Research Administrator’s Forum
i-Buy NYU Sneak Peek
April 14, 2016
Opening Remarks and Introductions

Key Changes

Sneak Peek/Demonstration

Next Steps
What is Project Lighthouse/i-Buy NYU?
What is Project Lighthouse/i-Buy NYU?

• Part of a University-wide initiative to improve the overall process of buying goods/services and paying suppliers.

• Involves the implementation of a new system, i-Buy NYU, which will replace eReq and two payment request forms:
  • Business Payment Form (BUS5000)
  • Payment to Individuals Form (IND4000)

• i-Buy NYU will impact anyone who buys goods or services at the University and is targeted to go-live on June 20, 2016.
Guiding Principles

• Enhance the NYU community’s quality of service through **improved transparency** into ordering and payment processes
• Ensure a **user-friendly experience** with an ease of use platform supported by self-service capabilities
• Adopt a **simple and consistent solution**, using best-in-class processes and technology
• **Eliminate paper forms** to increase efficiency, consistency and timeliness of transaction processing
• Implement simplified, yet effective, controls
Roles in i-Buy
NYU
Transactions are centered around the following key roles:

1. **The Shopper**
   - Selects items and adds them to a shopping cart
   - Assigns a cart to a Requestor within their school/department for review
   - Can acknowledge receipt of goods/services
   
   **Note:** All University employees will have the role of Shopper. Shopper cannot submit an order.

2. **The Requestor**
   - Reviews shopping carts assigned to them by a Shopper in their school/department*
   - Submits carts for approval
   - Acknowledges receipt of goods/services
   
   *Requestor will receive an email when a shopping cart has been assigned to them

3. **The Approver**
   - Reviews Purchase Requisitions*
   - Confirms purchases are accurate, complete, and compliant
   - Approves or returns requisitions**

   *Approver will receive an email notification when a requisition requires their approval.
   **Approvers have the ability to edit requisition details, including chartfields.
Key Changes to Grants-Related Processes (Funds 24/25)
Approval workflows for Funds 24/25 requisitions will be driven by the existing Departmental Administrator (DA) and Principal Investigator (PI) data within FAME, with the following rules:

- For Grants POs and Invoices (excluding subawards) **up to $5,000**, approval will be required by Dept. Admin.
- For Grants POs and Invoices (excluding subawards) **more than $5,000**, approval will be required by both Dept. Admin and PI.
- For all Subaward requisitions and invoices, approval will be required by both Dept. Admin and PI, **irrespective of dollar amount**.

As part of the i-Buy NYU release, **Flextecs will be decommissioned.** Please note the following important cut-off dates:

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
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<tbody>
<tr>
<td>Midnight, June 3</td>
<td>Last day for POs to be loaded in Flextecs.</td>
</tr>
<tr>
<td>Midnight, June 4</td>
<td>Last day to load invoices in Flextecs. Any invoices received after June 4 will be processed in i-Buy NYU.</td>
</tr>
<tr>
<td>Midnight, June 10</td>
<td>Last day for PIs to approve invoices in Flextecs. <strong>Any unapproved invoices as of June 10 will be canceled by Flextecs and reprocessed in i-Buy NYU from June 20 onwards.</strong></td>
</tr>
<tr>
<td>Midnight, June 14</td>
<td>Last day to process invoices through Accounts Payable.</td>
</tr>
<tr>
<td><strong>i-Buy NYU go-live:</strong> June 20th, 2016</td>
<td>All subaward invoice payments will be initiated via the Subaward Form in i-Buy NYU.</td>
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</table>

**NOTE:** Beginning July 1, 2016, invoice images and approval data from Flextecs can be requested by contacting the FinanceLink Service Center ([askfinancelink@nyu.edu](mailto:askfinancelink@nyu.edu) or x81111).
To order goods/services or issue payments to subawardees, all suppliers must be active within i-Buy NYU.

New suppliers can be added via the Supplier Request Form (accessible from i-Buy NYU homepage).
• Invoices can be submitted in i-Buy NYU one of the following ways:

Option 1: E-INVOICE
- Invoice submitted via web form or CXML
- Invoice received in i-Buy NYU

Option 2: PAPER INVOICE
- Supplier sends invoice
- Invoice received centrally
- Invoice scanned
- Invoice received in i-Buy NYU
Sneak Peek of i-Buy NYU
Demo: Funds
24/25 Process
Demo: Subaward Form
Next Steps
Thank you!

- User Acceptance Testing (UAT) will start at the end of April and will include 1-2 sessions exclusively for Departmental Administrators and Principal Investigators.
- Training will start in late May to early June.
- **Questions?** Contact project.lighthouse@nyu.edu, or visit the i-Buy NYU Resource Portal to access project documents: https://sites.google.com/a/nyu.edu/ibuy-nyu/