



Research Administrator's
Forum
i-Buy NYU Refresher

September 13, 2016



- Opening Remarks and Introductions
- i-Buy NYU Refresher
- Best Practices
- Training and Support
- Q&A

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
- Involved the implementation of a new system, **i-Buy NYU**, which replaced eReq, Flextecs and two payment request forms:
 - Business Payment Form (BUS5000)
 - Payment to Individuals Form (IND4000)
- i-Buy NYU impacts anyone who buys goods or services at the University and went live on June 27, 2016

- 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

A white banner is suspended from a building facade, partially obscured by green tree branches. The banner is blank in this section.

i-Buy NYU Refresher

A white banner is suspended from a building facade, featuring the NYU logo and the text "NYU" in blue. The banner is partially obscured by green tree branches.

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/dept 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/dept*



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



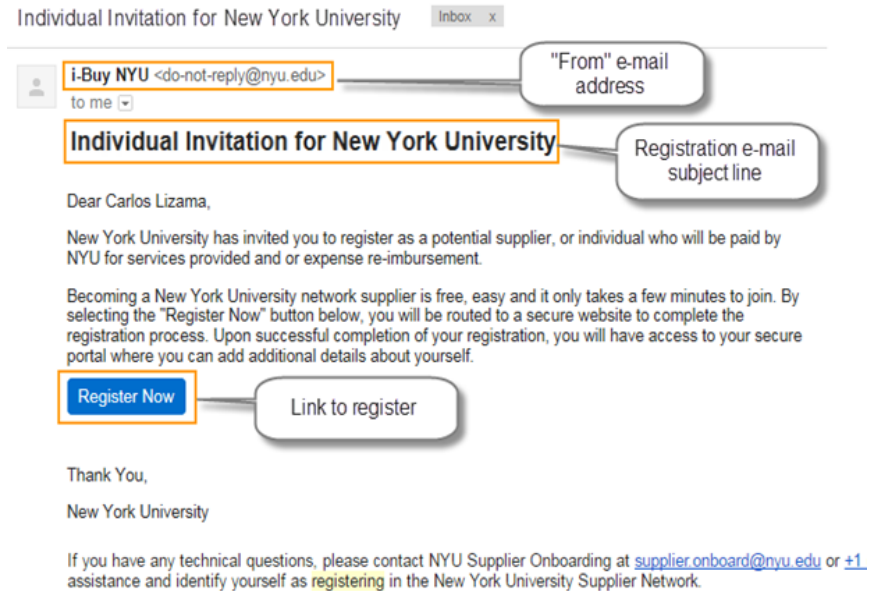
Approves or returns requisitions**

***Approver** will receive an email notification when a requisition requires their approval.

****Approvers** have ability to edit requisition details, including chartfields.

- Approval workflows for Funds 24/25 requisitions are 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**

- To order goods/services or issue payments to subawardees, all suppliers (including individuals) must be active within i-Buy NYU
- New suppliers can be added via the Supplier Request Form (accessible from i-Buy NYU homepage)
- Requests for new suppliers are sent to the Supplier Onboarding Team to review – once approved, suppliers will receive an invitation to register



Individual Invitation for New York University Inbox x

i-Buy NYU <do-not-reply@nyu.edu>
to me

Individual Invitation for New York University

Dear Carlos Lizama,

New York University has invited you to register as a potential supplier, or individual who will be paid by NYU for services provided and or expense re-imbusement.

Becoming a New York University network supplier is free, easy and it only takes a few minutes to join. By selecting the "Register Now" button below, you will be routed to a secure website to complete the registration process. Upon successful completion of your registration, you will have access to your secure portal where you can add additional details about yourself.

Register Now

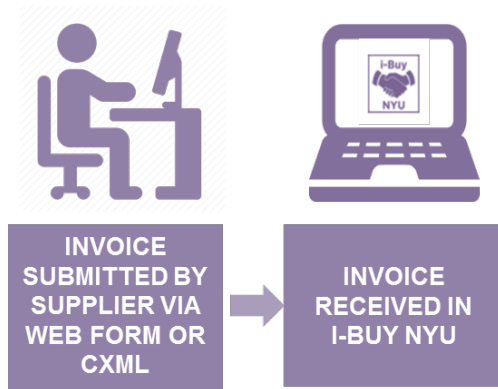
Link to register

Thank You,
New York University

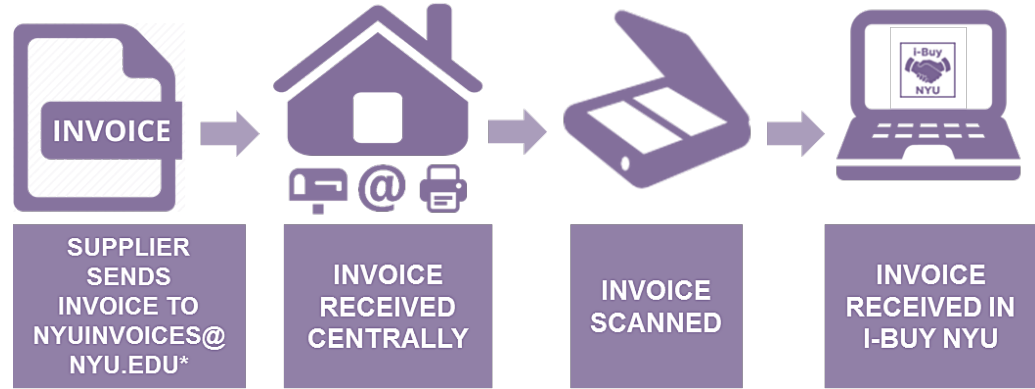
If you have any technical questions, please contact NYU Supplier Onboarding at supplier.onboard@nyu.edu or +1 assistance and identify yourself as **registering** in the New York University Supplier Network.

- Invoices can be submitted in i-Buy NYU one of the following ways:

Option 1: E-INVOICE



Option 2: PAPER INVOICE



*Acknowledgement email is provided.

DO...	DON'T...
<ul style="list-style-type: none">• Issue a purchase order to a supplier PRIOR to the goods/services being received	<ul style="list-style-type: none">• Copy askfinancelink@nyu.edu on any invoice submissions
<ul style="list-style-type: none">• E-mail all invoices to nyuinvoices@nyu.edu (and encourage your supplier to send them directly!)	<ul style="list-style-type: none">• Resend invoices to nyuinvoices@nyu.edu, as that will result in duplicates and delays in payment
<ul style="list-style-type: none">• Ensure the full, 10-digit PO number is listed on your invoice (e.g. iB00001234)	<ul style="list-style-type: none">• Send any other emails to nyuinvoices@nyu.edu as they will result in an error notification
<ul style="list-style-type: none">• Send only one attachment to nyuinvoices@nyu.edu (attachment can contain multiple invoices but cannot exceed 5MB)	<ul style="list-style-type: none">• Include a cover sheet in the attachment containing the invoices



A photograph of a classical building facade with a white banner hanging from a pole. The banner features the NYU logo and the text 'NYU'. The building has ornate architectural details, including columns and decorative moldings. Green foliage is visible in the foreground and background.

Training and Support

NYU

Step-by-Step Tip Sheets:

- Submitting Punchout Order
- Submitting Non-Catalog Order
- Submitting Catalog Order
- Customizing Profile and Setting Favorites
- Approving a Requisition
- Returning/Rejecting Requisition
- Receiving Goods and Services
- Searching Documents
- Setting up Recurring and Pre-Payment Requests
- Creating Standing Orders
- Splitting Chartfields
- Copying Requisitions
- Requesting a New Supplier
- Requesting Foreign Currency
- Commodity Codes
- Requesting Change Orders
- Understanding i-Buy NYU Forms
- Managing your shopping cart/approval queue
- **New** Supplier Registration
- **New** Managing Invoices

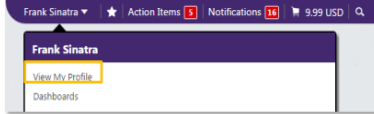

CUSTOMIZING YOUR USER PROFILE


WHAT'S MY PROFILE?

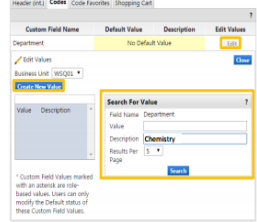
Profiles in i-Buy NYU allow you to make the buying and paying process more efficient and customize your user experience by allowing you to save default information, shopping addresses, frequently used chartfield values, cart assignees, notification preferences and email approval options. **Note**, some of the values in your profile are maintained administratively and cannot be changed – these include user roles, permissions, order settings and approval settings.

LET'S GET STARTED

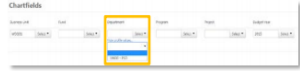
1. Login to i-Buy NYU via the Work tab of **NYUHome** using your Net ID and Password.
2. From the i-Buy NYU home page, click your name in the dashboard located in the top right and select **View My Profile** from the menu.



2. Within this menu, you have the option of defaulting Department, Fund, Program and Project. Be selective in what accounting values should actually be used as defaults for every order. Click the **Edit** button.
3. Click the **Create New Value** button and search using the value or description (Example: *Department Description = Chemistry*).



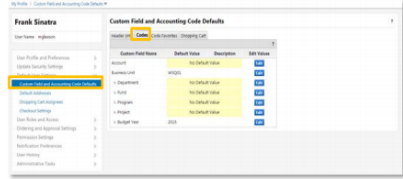
4. Select the desired value(s) and click the **Add Values** button.
5. The selected values will now appear as drop-down values that are quickly accessible during the Chartfield selection step of the Checkout process, as shown below.



6. For your first checkout, you will be prompted to add a shipping address to your profile. Click **Want to use a different address? Click here to add addresses to your profile**, then click **Select Address for Profile**, and search the directory using the building name or street number.

SETTING CHARTFIELD DEFAULTS

1. Click **Default User Settings > Custom Field and Accounting Code Defaults** and then **Codes**.



Video Tutorials:

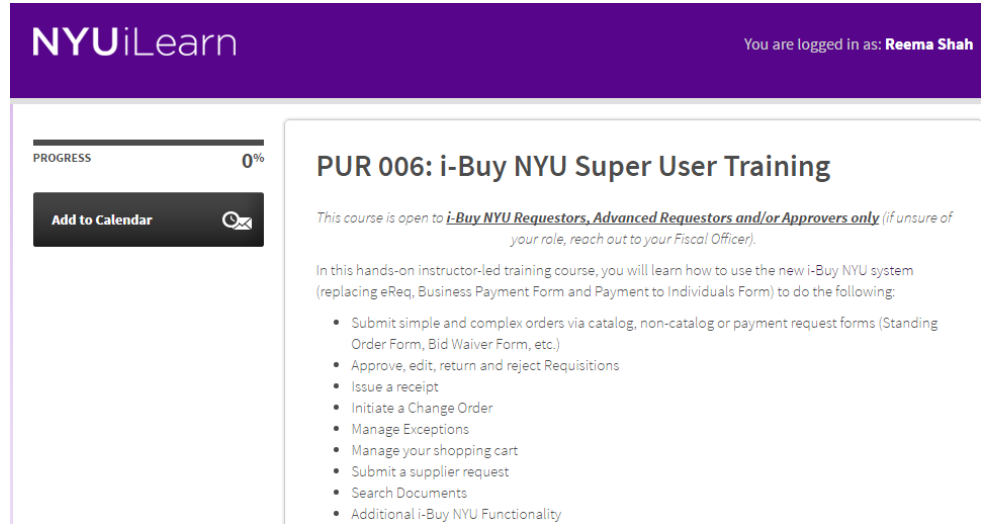
- Customizing Profile and Setting Favorites
- Total Supplier Management (Supplier Requests)
- Submitting Non-Catalog Order
- Creating Standing Orders
- Submitting Catalog/Punch-out Orders
- Receiving and Matching
- Approving a Requisition
- Returning/Rejecting Requisition
- Change Orders
- Searching Documents



Instructor-led training available:

- **September 16**
9am to 12pm
- **September 23**
9am to 12pm


Login to iLearn and search for the course PUR 006 to enroll.



The screenshot shows the NYU iLearn interface. At the top, the NYU iLearn logo is on the left and the user is logged in as Reema Shah on the right. Below the header, there is a progress bar showing 0% completion. A button labeled 'Add to Calendar' is visible. The main content area features the course title 'PUR 006: i-Buy NYU Super User Training' and a note that the course is open to i-Buy NYU Requestors, Advanced Requestors, and/or Approvers only. A list of topics to be covered in the training is provided below.

NYUiLearn You are logged in as: **Reema Shah**

PROGRESS 0%

[Add to Calendar](#) 

PUR 006: i-Buy NYU Super User Training

*This course is open to **i-Buy NYU Requestors, Advanced Requestors and/or Approvers only** (if unsure of your role, reach out to your Fiscal Officer).*

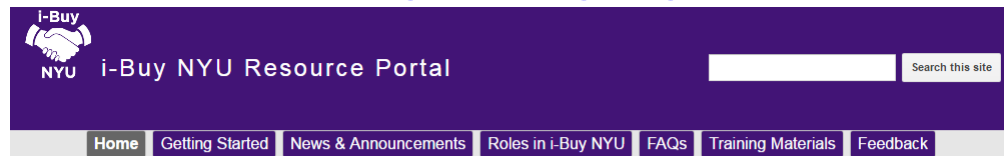
In this hands-on instructor-led training course, you will learn how to use the new i-Buy NYU system (replacing eReq, Business Payment Form and Payment to Individuals Form) to do the following:

- Submit simple and complex orders via catalog, non-catalog or payment request forms (Standing Order Form, Bid Waiver Form, etc.)
- Approve, edit, return and reject Requisitions
- Issue a receipt
- Initiate a Change Order
- Manage Exceptions
- Manage your shopping cart
- Submit a supplier request
- Search Documents
- Additional i-Buy NYU Functionality

Central repository for all things i-Buy NYU:

- i-Buy NYU Introductory Guide
- Glossary of Terms
- Training Materials
- Buying and Paying Guide
- Commodity Code-to-Account Code Crosswalk
- Change Order Matrix

bit.ly/ibuynyu



The screenshot shows the top navigation bar of the i-Buy NYU Resource Portal. It features the i-Buy NYU logo on the left, the text "i-Buy NYU Resource Portal" in the center, and a search bar on the right. Below the main header is a secondary navigation menu with buttons for "Home", "Getting Started", "News & Announcements", "Roles in i-Buy NYU", "FAQs", "Training Materials", and "Feedback".

Welcome to the i-Buy NYU Resource Portal! Here, you will find up-to-date information regarding the i-Buy NYU project as well as training videos, step-by-step tip sheets, and other helpful resources. [Are you a new i-Buy NYU user? Click here to get started!](#)



[i-Buy NYU Training Materials](#)

Download training material: i-Buy NYU Tip Sheets, Training Videos, and other materials.



[News & Announcements](#)

View announcements and communications.



[Presentations & Resources](#)

Access the Buying & Paying Guide, Commodity-Code Mapping Document, and additional resources.



[Calendar](#)

Access the master training schedule.



[Need help?](#)

Can't find the answer to your question on the resource portal? Contact the FinanceLink help desk:

Phone: 212-998-1111

Email: askfinancelink@nyu.edu



[Q & A](#)

Access the list of Frequently Asked Questions.

Questions about i-Buy NYU system? Contact FinanceLink helpdesk:



askfinancelink@nyu.edu



212-988-1111 (Option 4)

Questions regarding Project set-up, PI/DA roles, etc?

Contact appropriate SPA team:



SPA.Team.1@nyu.edu

SPA.Team.2@nyu.edu



[Visit SPA website](#)



Questions?





Thank you!

