• 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
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
i-Buy NYU Refresher
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
   
   **Note:** 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**

**Note:**

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

Option 1: E-INVOICE
- INVOICE SUBMITTED BY SUPPLIER VIA WEB FORM OR CXML
- INVOICE RECEIVED IN I-BUY NYU

Option 2: PAPER INVOICE
- SUPPLIER SENDS INVOICE TO NYUINVOCES@NYU.EDU*
- INVOICE RECEIVED CENTRALLY
- INVOICE SCANNED
- INVOICE RECEIVED IN I-BUY NYU

*Acknowledgement email is provided.
<table>
<thead>
<tr>
<th>DO…</th>
<th>DON’T…</th>
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<tbody>
<tr>
<td>• Issue a purchase order to a supplier PRIOR to the goods/services being received</td>
<td>• Copy <a href="mailto:askfinancelink@nyu.edu">askfinancelink@nyu.edu</a> on any invoice submissions</td>
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<tr>
<td>• E-mail all invoices to <a href="mailto:nyuinvoices@nyu.edu">nyuinvoices@nyu.edu</a> (and encourage your supplier to send them directly!)</td>
<td>• Resend invoices to <a href="mailto:nyuinvoices@nyu.edu">nyuinvoices@nyu.edu</a>, as that will result in duplicates and delays in payment</td>
</tr>
<tr>
<td>• Ensure the full, 10-digit PO number is listed on your invoice (e.g. iB00001234)</td>
<td>• Send any other emails to <a href="mailto:nyuinvoices@nyu.edu">nyuinvoices@nyu.edu</a> as they will result in an error notification</td>
</tr>
<tr>
<td>• Send only one attachment to <a href="mailto:nyuinvoices@nyu.edu">nyuinvoices@nyu.edu</a> (attachment can contain multiple invoices but cannot exceed 5MB)</td>
<td>• Include a cover sheet in the attachment containing the invoices</td>
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Training and Support
On-Demand Training Materials

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
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.
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
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!