

UF

An Introduction to

*my*uf marketplace

September 19, 2019





## Agenda

# Agenda

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- Introduction
- Timeline
- Benefits of the new system
- Changes to expect
- Roles and Access
- Training and Resources
- Q&A

*For those joining us  
online...*

**Have a question?  
Email us at:**

**[myUFMarketplace@ufl.edu](mailto:myUFMarketplace@ufl.edu)**  
**u**

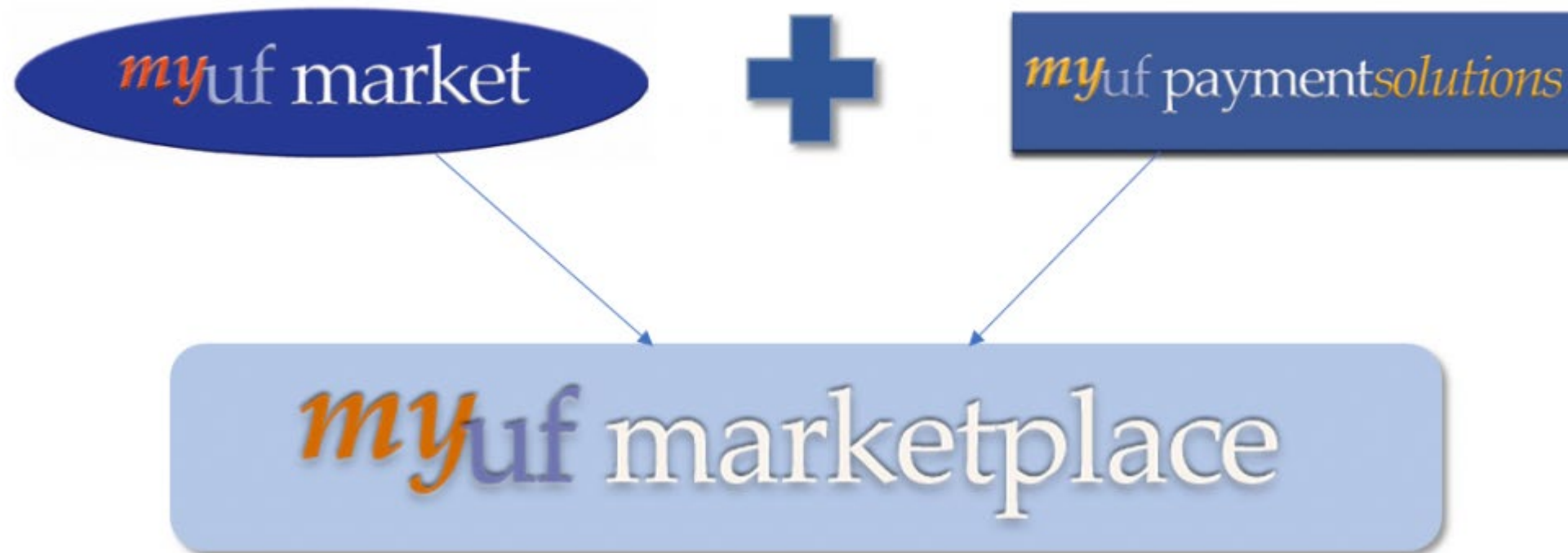


## Introduction

# What is myUF Marketplace?

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- myUF Marketplace is a new single procure-to-pay system designed to streamline processes for our faculty and staff using the current myUF Market platform.













# How did we get here?

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- UF introduced myUF Payment Solutions in 2014 to streamline, digitize and automate invoicing and vouchering.
- At that time, myUF Market (Sciquest>Jaggaer) did not have payment functionality, so UF selected Corcentric as its vendor.
- Today, new functionality is now available that will allow both functions to exist in one system using myUF Market.
- Having POs and invoices in one system will resolve many issues.
- While we know there may be some bumps getting there, we also know this will ultimately improve things for everyone!

## Project Timeline

# Project Timeline

Activity	OCT – NOV 2018	DEC – JAN 2018 / 19	FEB – APR 2019	MAY – SEPT 2019	OCT – DEC 2019
Focus Group Inform & Feedback					
Project Pre-Planning					
Campus Engagement Business Transformation			 		
Marketplace Design and Build					
Focus Group Solution Validation					
Training					
Marketplace GO LIVE					

**System  
Go-live**



**Oct. 28**



# myUF Marketplace Focus Groups



## UNITS REPRESENTED

Business Services Division  
College of the Arts  
College of Dentistry  
College of Education  
College of Health and Human Performance  
College of Journalism and Communications  
College of Law  
College of Liberal Arts and Sciences  
College of Medicine  
College of Nursing  
College of Pharmacy  
College of Planning, Design & Construction  
College of Public Health and Health Professions  
College of Veterinary Medicine  
Contracts and Grants  
Facilities Services  
Herbert Wertheim College of Engineering  
IFAS  
Wayne Reitz Union  
Office of the Chief Financial Officer  
Office of the Provost  
Office of Research  
Student Health Care Center  
University Housing  
University Registrar  
Warrington College of Business

- Held October 2018
- High-volume representatives from all colleges
- Current state, future state and demo discussions
- Representatives took info back to departments for feedback, which was considered during design phase

# myUF Marketplace Change Management Workgroup

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- Began meeting in the Spring of 2019
- Designed to anticipate potential challenges and opportunities for communication and training to support the transition

Anthony Barrett  
Zac Bielling  
Dianna Brook  
Angie Brown  
Amanda Burkett  
Barbie Cromwell  
Lisa Deal  
Lawanna Duncan  
Tammy Frost

Cindy Futral  
Danielle Godwin  
Ruth Harris  
Nicola Heredia  
Robin Hull-Kress  
Nikki Lyons  
Victoria Masters  
Michelle McAdams  
Donna McKee (Huron)

Daniel Morgan  
Marianne Preisler  
Kimberly Rovansek  
Randy Staples  
Rita Steff  
Alicia Turner



## Benefits of myUF Marketplace

# From two systems to one!

All payments and POs will now be housed in one location

**myuf market**

1 of 11 Results

Invoice Number: **V0000314** Supplier Account No. Taking action on this document acknowledges receipt of goods or services on behalf of the University.

Supplier Invoice No. **1137497** Invoice Image [19248909630001.pdf](#)

Supplier Name: **Huron Consulting Group LLC**

Buyer Invoice Approvals **Matching** Comments Supplier Messages Attachments (1) History

Please see the highlighted items below for any matching exceptions.

Show Related Documents Expanded

**PO Number : UIT1902018**

Match Status	Matching Method	Invoice Line No.	PO Line No.	Catalog No.	Description	Size/Packaging	Unit Price	Quantity	Ext. Price
Matched	2 Way PO/Invoices <a href="#">show matching rules</a>	1	1		Consulting	1/LO	1,902.00 USD	1	1,902.00 USD

Matching Exceptions:

- Invoice extended price exceeds PO by: 29.00 USD


Matching Summary

	Ordered	Received	Net Invoiced
Quantity:	1	--	3
Unit Price	5,000.00 USD	--	50.00 USD - 3,077.00 USD
Ext. Price:	5,000.00 USD	--	5,029.00 USD
Document DTS&H:	0.00 USD	--	0.00 USD



# From two systems to one!

All payments and POs will now be housed in one location



PO/Reference No. **UIT1902018 Revision 0** Available Actions

Supplier **Huron Consulting Group LLC**

[Status](#)
[Purchase Order](#)
[Revisions](#)
[PO Approvals](#)
[Change Requests \(1\)](#)
[Invoices](#)
[Comments \(1\)](#)
[Attachments](#)
[History](#)

General Information		Document Status	
PO/Reference No.	<b>UIT1902018</b>	PO status	Open
Revision No.	0	Workflow	✓ Completed (8/18/2019 9:20 AM)
Supplier Name	Huron Consulting Group LLC <a href="#">more info...</a>	Distribution	The system distributed the purchase order using the method(s) indicated below the last time it was distributed: Fax: +1 312-583-8701 Manual
Purchase Order Date	8/18/2019	Distribution Date/Time	8/18/2019 9:20 AM
Total	5,000.00	Supplier	Sent To Supplier
Shopper Name	Gator Requestor		
Shopper Phone			
Shopper Email	<a href="mailto:mpreis@ufl.edu">mpreis@ufl.edu</a>		
Requisition Number	2740951 <a href="#">view</a>   <a href="#">print</a>		

**Line Item Status**

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Receiving	Invoicing	Matching
1	Consulting <a href="#">more info...</a>		1/LO	5,000.00	1 LO Add discount...	5,000.00 USD	none	⚠ Over Invoiced	⚠ With Forced Matches

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

**Total 5,000.00 USD**

## Other big wins

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- Integration of POs, vendors and vouchers between myUF Marketplace and myUFL system almost instantaneously instead of overnight
- Invoices will be sent electronically into system where POs live
- Because of this, PCards will no longer be the most efficient means of processing in the system and their use in the Marketplace will be discontinued (still be used outside)
- Thanks to focus groups, we are also taking this opportunity to change the UFFPA process — *We heard you!*
- Budget-checking previously unavailable will now be available (e.g., vouchers will budget check)
- The recurring invoices process is vastly improved
- During our open house demonstration a few users stated “Thank you for choosing a system that we already know how to use.”



# Select Expedited Approval (SEA)

- myUF Marketplace will be programmed to provide for Select Expedited Approval (SEA).
- Invoices received from the 8 vendors listed at right for \$500 or less will automatically approve (*no department approval required*) and flow to myUFL to build the voucher for payment.
- Payments will be made based on the vendor's pay terms. (*Provides a window to resolve any potential discrepancy*)
- Departments will be able to search for these invoices.
- Invoices can be opened and additional attachments added to the backup documentation.

## SEA-APPROVED VENDORS

Fisher Scientific

Office Depot/Mister Paper

Bio-Rad

Sigma-EMD Millipore

Henry Schein

Qiagen

Airgas

Changes to expect

# How will these changes affect your unit's business processes?

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- Pcard usage will be discontinued in the Marketplace.
- All transactions require a business justification.  
*Not a change, but a chance to ensure this is being done properly*
- Due to new functionality, the UFF-PA is no longer needed for these transactions. All AP processors will need to take the UFF Fund Administrator Training if they have not already done so. (**UF\_ADV006\_OLT Fund Administrator Training**)
- No longer a need to distribute POs by quantity or amount — just pick the right form and it defaults for you



# How will these changes affect your unit's business processes?

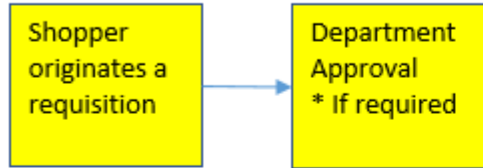
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- Change Order integration into the Marketplace is in process
- Conversion to the Marketplace
  - Invoices in Corcentric
  - Access to Corcentric
  - Images
- Unencumbered transactions will require a second level of approval.

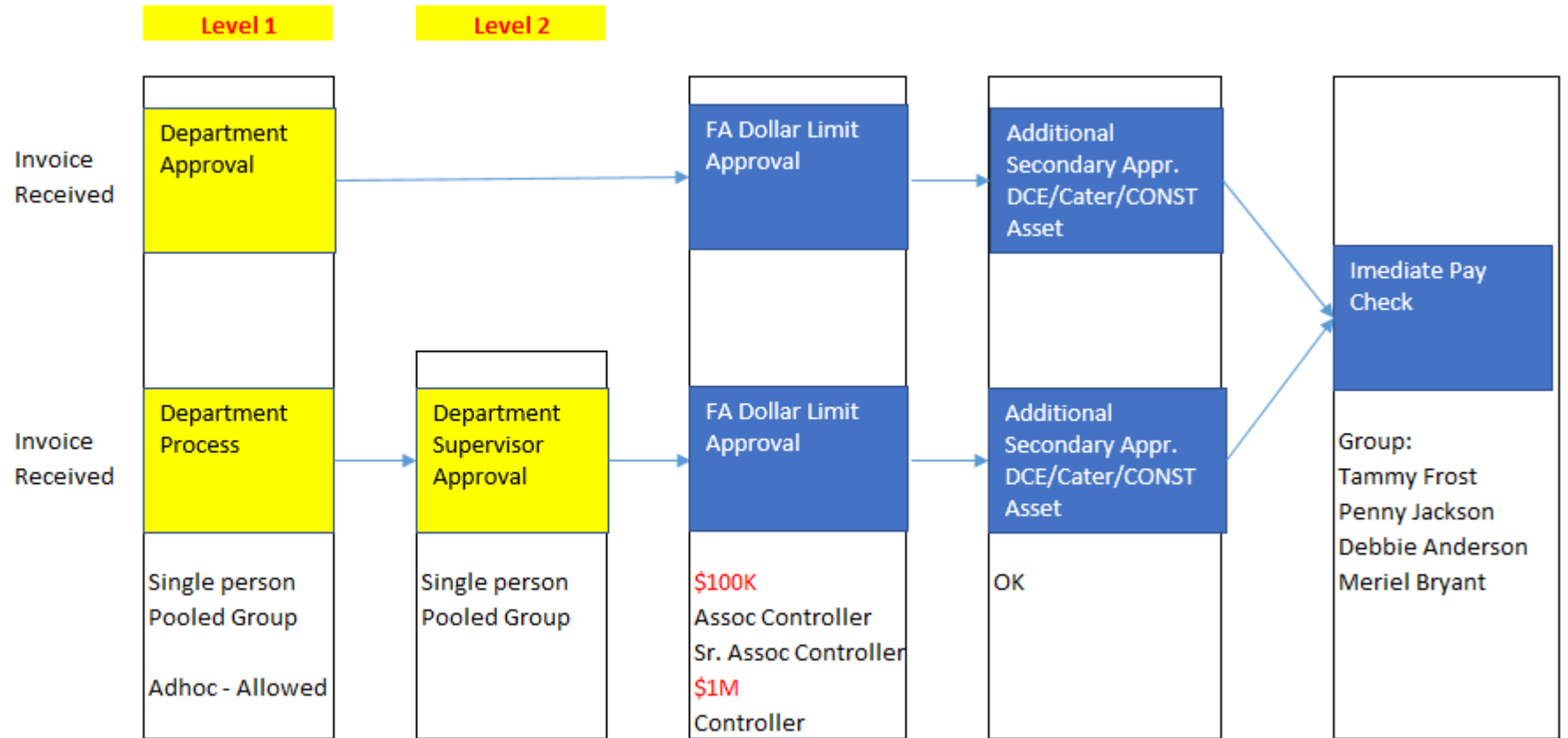
# New department approval workflow

Departmental Approvals:

Encumbered Payment:



Unencumbered Payment:



## Roles and Access



## How can you prepare for this change?

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- Department administrators can begin thinking now about how their business processes will change.
- Two levels of approvers will be needed:
  - Level 1: Same as the current AP Approver role today.
  - Level 2: New. A second level department approval will be required for unencumbered transactions. A list has been distributed by UF Disbursement Services to acquire this information.
  - Goal – 2 sets of eyes on every transaction
  - Every unit will need Level 1 and Level 2 approvers.

# How will these changes affect your unit's business processes?

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- The current UF Market roles will be utilized in AP as well:
  - UF\_N\_MKT\_REQUESTOR (*AP Level 1 Approver*)
  - UF\_N\_MKT\_FINANCIAL\_APPROVER (*AP Level 2 Approver*)

If you currently have one of these roles, you will be setup in AP as a Level 1 if you also currently have the UF\_AP\_APPROVER role or Level 2 if you notify Disbursements.
- If you do not have one of these roles, ask your DSA for access
- More information on roles available at:  
<http://www.fa.ufl.edu/directives/myuf-marketplace/>

# Vendor Notification

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- Vendors have been notified  
The UF Marketplace will allow for invoice submissions by vendors via email, fax or snail mail  
The existing email address with Corcentric today will forward all invoices received during a grace period
- If you would like to notify anyone, a template notification letter is available on the myUF Marketplace section of F&A website:

<http://www.fa.ufl.edu/wp-content/uploads/2019/04/UF-Supplier-Letter-for-Invoice-Submission.pdf>



## Training and Resources

# Training

- **Hands-on Sessions** — *Before go-live to get accustomed to the new system*
- Registration is open in myTraining
  - ***UF\_PST082\_ILT myUF Marketplace Overview***

Date	Time	Location
Friday, September 20, 2019	9:00 AM – 11:00 AM	Dodge Island, UF Enterprise Systems
Monday, September 23, 2019	9:00 AM – 11:00 AM	C1-121, Health Science Center Library (Communicore)
Friday, September 27, 2019	2:00 PM – 4:00 PM	Dodge Island, UF Enterprise Systems
Thursday, October 03, 2019	2:00 PM – 4:00 PM	Dodge Island, UF Enterprise Systems
Friday, October 11, 2019	2:00 PM – 4:00 PM	C1-121, Health Science Center Library (Communicore)
Tuesday, October 22, 2019	2:30 PM – 4:30 PM	C1-121, Health Science Center Library (Communicore)

\*More sessions will be added and opened to registration as needed.

# Training

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- **Just-in-Time Training** — *Simulations and Instruction Guides will be available to support you upon go-live on the myUF Marketplace Toolkit*
- **Open lab sessions** — *Post- go-live opportunities to bring your work and questions to labs with the core office team*
- **Full course updates** — *Post- go-live, later in 2019; will be required*
- **UFF Training - UF\_ADV006\_OLT Fund Administrator Training**



## Further resources

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- Visit the [myUF Marketplace](#) section of the Finance and Accounting website for:
  - New workflow
  - Information on roles
  - Template letter for vendors
  - Frequently Asked Questions (*coming soon*)
  - Terminology (*coming soon*)
  - Recording of this presentation (*coming soon*)

<http://www.fa.ufl.edu/directives/myuf-marketplace/>

Q&A

# We're here to help!

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- **Contact the myUF Marketplace Project Team at [myUFMarketplace@ufl.edu](mailto:myUFMarketplace@ufl.edu)**
- **Visit <http://www.fa.ufl.edu/directives/myuf-marketplace/>**
- **Thank you for coming / tuning in!**