Agenda

- 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
Introduction
What is myUF Marketplace?

- 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?

- 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

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**System Go-live**

Oct. 28
myUF Marketplace Focus Groups

- 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

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
myUF Marketplace Change Management Workgroup

- 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
From two systems to one!

All payments and POs will now be housed in one location
From two systems to one!

All payments and POs will now be housed in one location
Other big wins

- 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.

<table>
<thead>
<tr>
<th>SEA-APPROVED VENDORS</th>
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<td>Fisher Scientific</td>
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<td>Office Depot/Mister Paper</td>
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<td>Bio-Rad</td>
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<td>Sigma-EMD Millipore</td>
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<td>Henry Schein</td>
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<td>Qiagen</td>
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Changes to expect
How will these changes affect your unit’s business processes?

- 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?

- 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:
  - Shopper originates a requisition
  - Department Approval * if required
  - Invoice Received

- Unencumbered Payment:
  - Invoice Received
  - Department Approval
  - Department Process
  - Single person Pooled Group
  - Sr. Assoc Controller
  - Dept. Controller

**Level 1:**
- Department Approval

**Level 2:**
- FA Dollar Limit Approval
- Additional Secondary Appr.
- DCE/Cater/CONST Asset

Immediate Pay Check

Group:
- Tammy Frost
- Penny Jackson
- Debbie Anderson
- Merle Bryant

-$100K
- $1M Controller
Roles and Access
How can you prepare for this change?

- 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?

- 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

Vendor Notification

- 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:

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*

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<tr>
<th>Date</th>
<th>Time</th>
<th>Location</th>
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<tr>
<td>Friday, September 20, 2019</td>
<td>9:00 AM – 11:00 AM</td>
<td>Dodge Island, UF Enterprise Systems</td>
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<td>Monday, September 23, 2019</td>
<td>9:00 AM – 11:00 AM</td>
<td>C1-121, Health Science Center Library (CommunCore)</td>
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<td>Friday, September 27, 2019</td>
<td>2:00 PM – 4:00 PM</td>
<td>Dodge Island, UF Enterprise Systems</td>
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<td>Thursday, October 03, 2019</td>
<td>2:00 PM – 4:00 PM</td>
<td>Dodge Island, UF Enterprise Systems</td>
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<td>Friday, October 11, 2019</td>
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<td>C1-121, Health Science Center Library (CommunCore)</td>
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<td>Tuesday, October 22, 2019</td>
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<td>C1-121, Health Science Center Library (CommunCore)</td>
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*More sessions will be added and opened to registration as needed.*
Training

- **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

- 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/
We’re here to help!

- Contact the myUF Marketplace Project Team at myUFMarketplace@ufl.edu

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

- Thank you for coming / tuning in!