A New Way to Buy...

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What is Smart Source?

- Smart Source is a Software as a Service application provided by SciQuest, Inc.
  - Smart Source is a tool to make the purchase of goods/services more effective and efficient for faculty and staff by automating the procure-to-pay process.
  - There is no need to install software; Smart Source is a “cloud” based application accessed through DrexelOne on the Employee Tab.
    - Must be a student, staff or faculty for DrexelOne access.
    - Do not share DrexelOne login credentials.
      » Can cause safety and security issues.
Smart Source Login and Data Security

• Acknowledge Data Access upon login
  – Smart Source contains proprietary information in a transparent fashion
    • Those accessing the system should be aware of and acknowledge their understanding of the requirement to adhere to University policies relative to data access and system security.
    • Shopper roles do not have access to system data
  – Data Risk
    • Open Access-Transparency
      – Ability to download information from system
        » Have a right to data for analysis purposes
        » Strive to protect data and secure system information
        » Responsibility with Information (No trolling)
Purchasing Tools

- Two ways to purchase: Smart Source (RTP) and P-Card
  - P-Card use and Smart Source
    - P-Card will not be used in Smart Source but will continue to play a strategic role outside of Smart Source for:
      - Travel and entertainment
      - Suppliers who are not yet enabled as a hosted or punch-out supplier
        » This is an initial list and additional suppliers will be enabled as time permits
Setting Up Your Profile

• From the home page, select your name from the menu bar and then select the **View my Profile** link from the drop down menu.
Setting Up Your Profile

• The profile page appears. Verify your phone number and email address is correct. Email should remain a Drexel domain address.
Setting Up Profile

• Your profile can be customized in such a way as to eliminate rekeying of information as you create carts or key forms
  – Name, Phone Number, Email
    • Email must remain a Drexel domain address
      – Notifications from Smart Source will be sent to this address
  – Language, Time zone, Display, Password
    • You will not need to change access is from DrexelOne
Setting Up Profile

– Defaults & User Settings
  • Account codes
    – Ability to save Cost Center Favorites
      » You can set cost center default for fund and orgn
      » Do not set default for Acct code
  • Addresses
    – Ship to: select from Receiving Dock/other campus address
    – Bill to: this address will default automatically
  • Cart assignees for approval (2 names)
    – Shoppers need to know who to assign their carts to in their respective area

Changing Ship to Addresses Job Aid
Catalogs

• Hosted
  – A hosted catalog is a supplier provided catalog of goods and services that is loaded, and maintained, by the University

• Punch-out
  – Supplier’s maintained catalog of goods/services. Select items to fill your cart. At checkout the cart is returned to Smart Source to complete
    • Similar to traditional shopping sites
    • No two punch-out sites operate the same
    • Any saved favorites/carts/orders will not be transferred into system
    • System Time Outs
      – Punch-out Suppliers have varying session timeouts
      – Bringing your items back into Smart Source will save your cart
Roles-Shoppers and Requesters

• Shoppers- Catalog access only
  – Places items in a cart from a catalog Supplier and assign the cart for a requester to review/complete (Example: Lab assistants)

• Requester- Catalog and Forms access
  – Inputs/corrects cost center information as needed on shoppers’ carts, can order directly; all carts route to an approver (Example: New employees)

• Requester Plus- Catalog and Forms access + approval up to $4999
  – Inputs/corrects cost center information as needed on shoppers’ carts, can order directly; role has implicit approval up to $4999 so carts are completed without and additional approval (Example: P-Cardholders)
Roles-Approvers

- Approvers are notified via email when a document has been routed for their approval; email contains a link that takes the recipient directly to DrexelOne.
  - To approve or return a request or invoice, one must first assign to oneself.
- Carts are automatically routed for review for:
  - Accuracy (cost center, shipping information, etc.)
    - Approvers cannot modify a request—must return to requester for resubmission.
  - Allowable/Business purpose of goods/service being requested.
  - Purchase is consistent with University policy, procedures, and guidelines
    - Tax determination, contract protocol, etc.
  - Act as a second set of eyes on the transaction.

[Approver User Guide] [Approving a Requisition Job Aid]
Approval Levels

- For most cost centers there is a single approval level in Smart Source. Where departments have opted to have two levels, the first is up to $25,000; the second is >$25,000
  - Each department has two individuals in each approval level
  - Requests will be subject to reviews beyond departmental level based on the characteristics of the request. Approval steps can be viewed by selecting the PR Approvals tab from the requisition.
Notification and Action Items

• Smart Source Banner on the top right of any page in Smart Source displays action items to all your assigned or unassigned requests, invoices and approvals
  – Action Items provide quick links identifying transaction groupings and counts. By clicking on the groupings, you can drill down to the document requiring your action
    • Examples- Cart Returned, etc.
  – Notifications are set by the end user and can be informational or provide more detail of the transaction requiring an action (this is just a notice)
Invoice Approvals

- Invoice Approvals
  - Will be sent to shopper or the user who created the cart
  - User will receive two notices with link, on 3rd notice approval will default
  - You have the ability to assign (forward) invoice for approval
  - Review invoices for:
    - Accuracy (PO referenced, line item(s), quantity, overall amount, etc.)
    - Discount, tax, shipping and handling

[Approving an Invoice Job Aid]
Placing An Order

• Fill Cart
  – Adding a Punch-Out Item to your cart (Punch-Out Job Aid)
  – Adding a Non-Catalog Item to your cart (Non-Catalog Item Job Aid)

• Checkout or Assign
  – Either Click “Submit Requisition” to complete the request or assign the cart to a requester
Proceed to Checkout

• Indicators for missing information
  – Shipping and Billing address
  – Accounting Codes
    • Select from cost center favorites or search by number or name
    • Banner updates once a day ([Changing Funding Sources Job Aid](#))
  – Internal Notes and Attachments (viewed by Drexel)
    • Quotes, Bids, Email Requests
  – External Notes and Attachments (Viewed by Suppliers)
    • Attachments cannot be viewed by Punch-out Suppliers
      – Contact Punch-out Supplier with additional information
  – Final Review
Proceed to Checkout-Approval Tab

• Ability to see where the order stands
  – Approvals: Banner, Financial, Research, Procurement, etc.
    • May need to follow up with financial approvers
    • Ability to assign to approver; approver has the ability to assign approval to themselves
  – Everything you order will create a PO and encumber funds
  – Supplier could have information in a matter of minutes
    • Change Orders
      – Do not contact Supplier to add items to existing order; process a new order for additional items
Other Forms

• Multi Year Funding Source
  – For purchases that cross multiple fiscal years; not common

• Sub-award
  – Procurement of specific services or program related tasks for grant funds
Other Forms

• Sole Source Justification
  – Exemption Criteria Overview
    • One of a Kind, Compatibility, Replacement Part, Delivery Date, Research Continuity, Unique Design, Emergency
  – Once submitted and approved as sole source, will turn into PO

• Check Request
  – There is a limited application for check request (Check Request Job Aid)
    • Honoraria, prizes/awards, postage, sponsorships
    • Staff/Student non-travel reimbursements
    • Travel & Entertainment Reimbursements Non-Employees
      – Example: faculty candidates
Check Requests not in Smart Source

- Student Refunds
- Patient Refunds
- Interlibrary Loans
- Clinical Trial Reimbursements
- Some payroll withholdings payable to a 3rd party (e.g., United Way, union dues)
- Legal Settlements
- Other sensitive/confidential payments
Search Functions

• Simple Search
  – Click on the Home/Shop page. Enter the Product Description, or Catalog Number in the Search box. Click on the Drop Down box to limit the search by category.

• Advanced Search
  – Click on Advanced Search to display additional filters such as Supplier Name or SKU.
Browse Functions

• Browse Suppliers
  – Click on Browse: suppliers to view an alphabetical listing of suppliers. Click on a contracted supplier name to display a list of product categories; click view (incl. sub-categories) to view that category’s products.

• Browse Categories
  – Click on Browse: categories to view a listing of product categories. Click on the plus sign to expand and view listed products within each category. Click on view (incl. sub-categories) to see products in a Search Results listing.

• Browse Chemicals
  – Click on Browse: chemicals to locate chemicals and reagents by their molecular structure or sub-structure. Users can draw structures and the system provides a list of matching items in the results display.
Functions Not Performed In Smart Source

• Travel and Expense Reporting
  – T&E will continue as a paper based process as it is today