DREXEL UNIVERSITY
Smart Source
Procure to Pay

A New Way to Buy...

Update   **June 5, 2015**

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

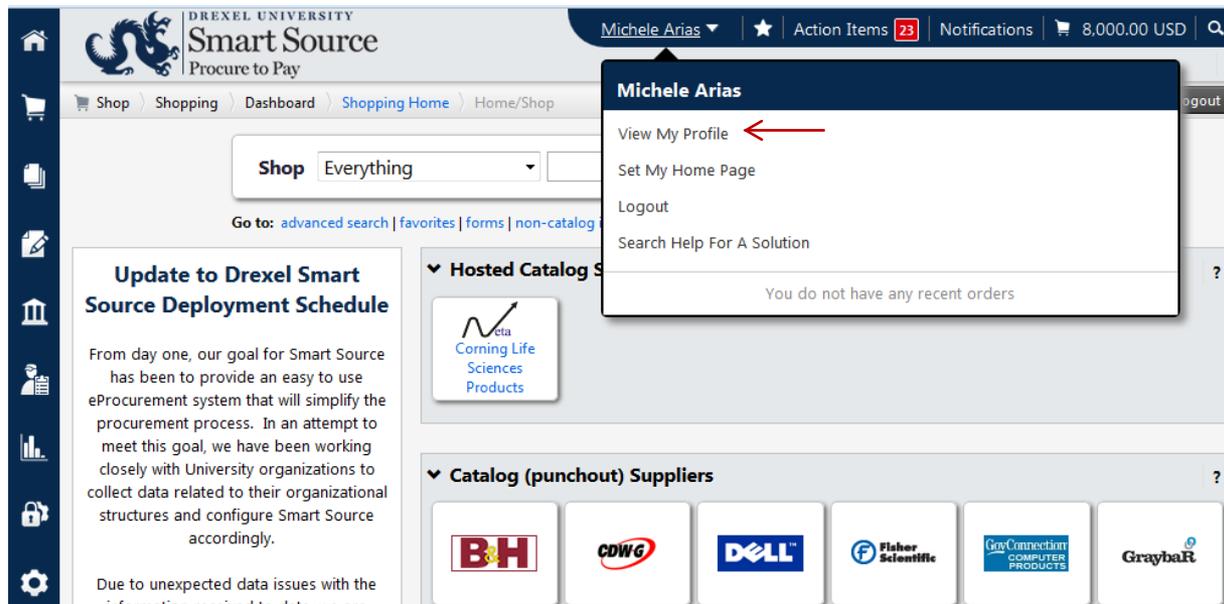# Smart Source Login and Data Security

- 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
        » Currently: Neta Scientific, B&H Photo, CDW-G, Dell, Fisher Scientific, GovConnection, Grainger, Graybar, Life Technologies, McKesson, McMaster-Carr, Perkin Elmer, Telrose Corp, Thomas Scientific, VWR International, Replica
        » 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