Strategic Sourcing Without Supplier Enablement

Session #26774

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Anaheim, California

Your Presenters

- David Best

- Senior Business Analyst

- Seven Years with ERP

- Past Associate Director of Purchasing

- 42 Year Seminole

Overview

- When FSU encountered an urgent need to convert legacy bidder records and track bid events the decision was made to use PeopleSoft Strategic Sourcing for that purpose even though the ERP system did not include a supplier portal.

Response to Need

Phase 1 Strategic Sourcing Implementation without Supplier Enablement :

1. *Store Bidder records and categorizations in OMNI (FSU PeopleSoft System)*
2. *Enable Purchasing Dept staff to add and update bidder records online, and*
3. *Create numbered competitive solicitation events within PeopleSoft Financial/SCM.*

Florida State University

……a public university with an emphasis on research, education and public service.

- ➢ **Located in Tallahassee, the capital city of Florida**

- ➢ **Over 39,000 students**

- ➢ **Over 14,000 employees**

- ➢ Annual Operating Budget: $1.1B

FSU and Oracle

- Big Bang go live with PeopleSoft Financials version 8.4 on July 1, 2004 and HR on December 17, 2004.

- Currently on FIN version 8.9, MP5.

- Upgrade to FIN version 9.0, MP5 and conversion from DB2 to Oracle Database Go Live on April 6, 2009.

History of Bidder Management

- Three Ring Binders

- dBase

- Outsource to App Service Provider

- Oracle Strategic Sourcing

Project Timeline

- **Project Assessment**
  - *First Look*   *Sept 1, 2007*
  - *Formal Approval*   *Nov 15, 2007*

- **Configuration through Stabilization**
  - *Setup*   *Nov 16, 2007*
  - *Go-Live*   *Feb 21, 2008*
  - *Stabilization Ends*   *March 25, 2008*

In Scope, Phase 1

Load Legacy Bidder Records

Employee Online Bidder Registration and Management

Create Bid Events

Out of Scope

- Bidder Self Registration via Supplier Portal
- Bidder Self Service Maintenance
- Event Posting
- Open Period Event Management
- IM via MultiChannel Franework
- Receipt of Bids
- Awards

Preliminaries

- PeopleBooks
- Explore with Delivered Roles
- Fit Gap Analysis
- Estimate Resource Requirements
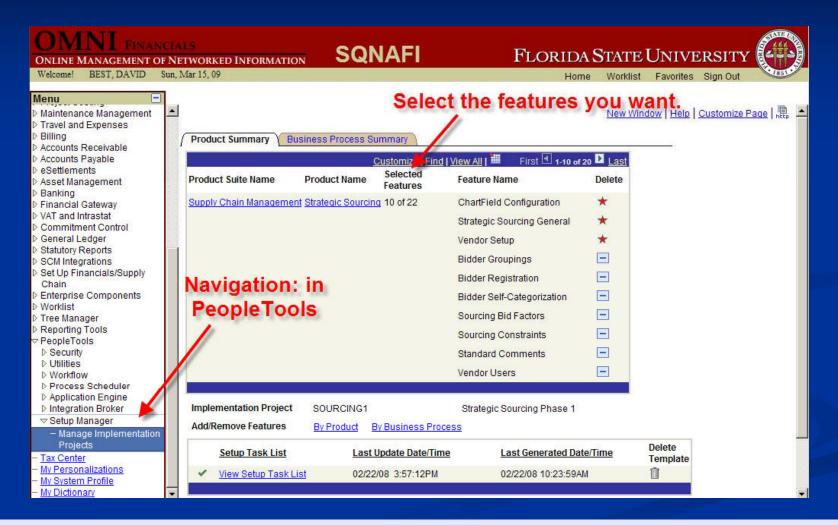- Project Plan
- Document from the Outset

Setup Manager

- **Create Sourcing Project**

- **Track Completion of Sourcing Tasks**

- **Security Issues**
  - *Delivered Role:*
    - PTLT_IMPLEMENTER
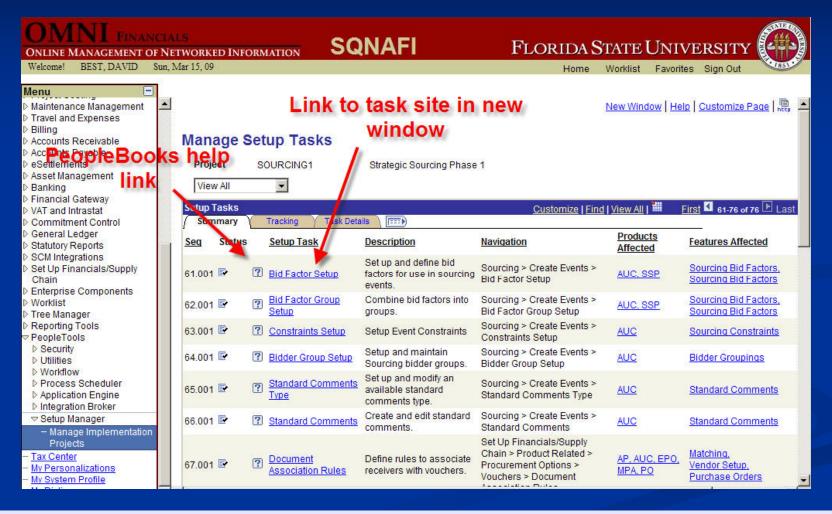   - PTLT_PROJECT_MGR
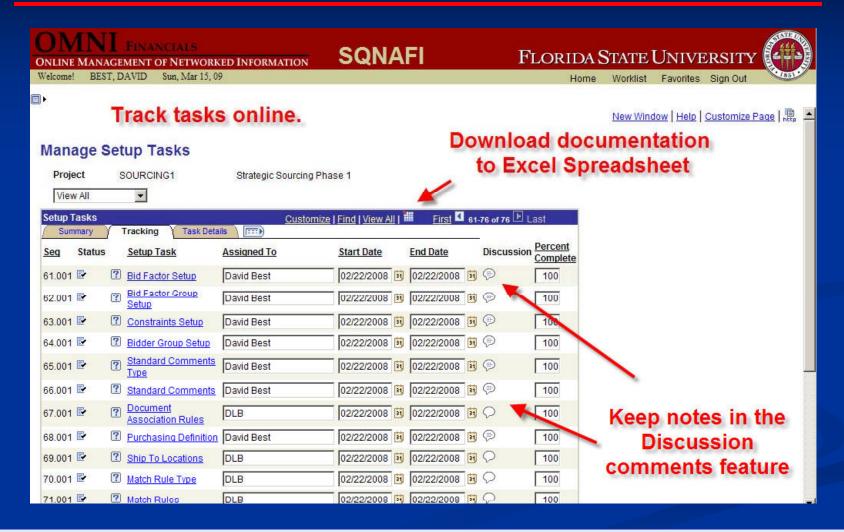 - *Access to Task List Pages and Components*

Select Options & Create Project

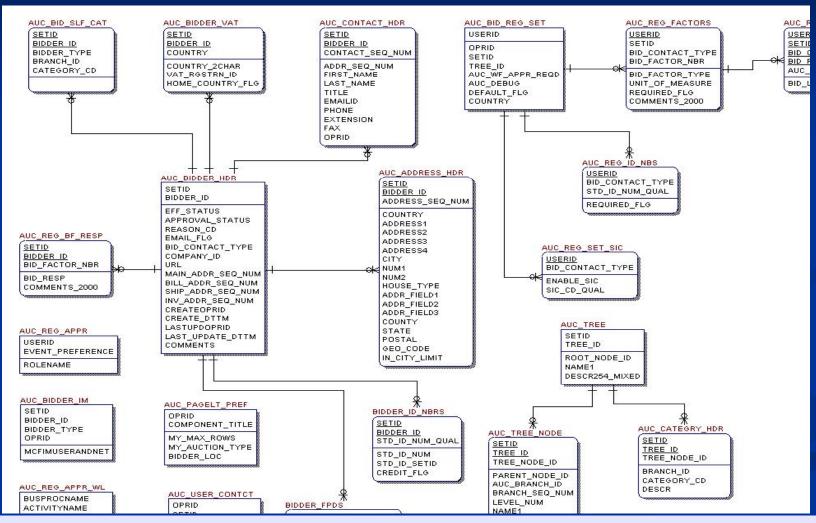# Setup Summary

Online Project Tracking

Download to Spreadsheet

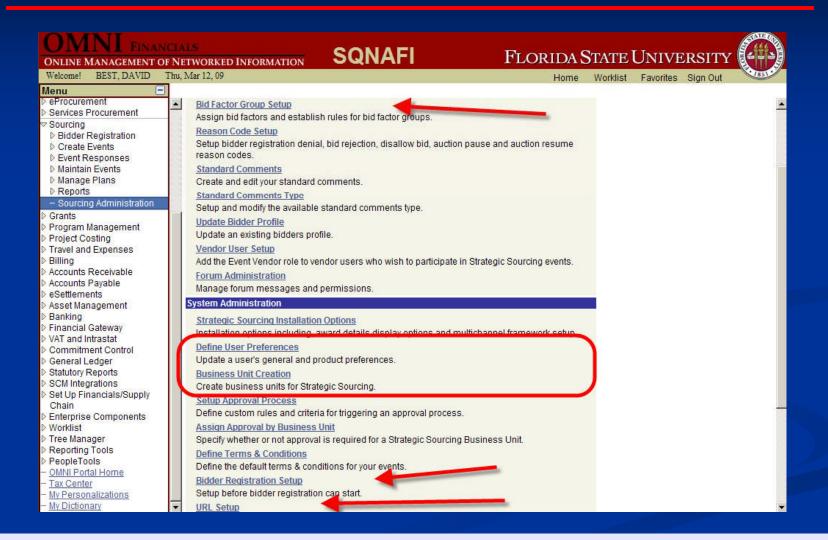|	A	B	C	D	E
G67			fx		
1	TASK	TASK_NAME	ASSIGNED	PCT_COMPLETE	PTLT_DISCUSSION
64	56.001	Notification Templates	David Best	100	Will be needed for Phase 2. Add to Config guide.
65	57.001	Create SelfCategorization Tree	David Best	100	Used temporary All Items tree until the fix for adding a tree in Self Categorization Tree is migrated.
66	58.001	Bidder Registration Setup	David Best	100	Add to Config Guide. Use user_id FSU_BIDDER. Set up all Purchasing Dept staff who will access sourcing.
67	59.001	Define Terms and Conditions	David Best	100	Use TBD for Phase 1
68	60.001	Administer File Attachments	David Best	100	Not needed until Phase 2.
69	61.001	Bid Factor Setup	David Best	100	Set up sample numeric type bid factor for testing. Revise when details are provided by buyers and more fully understood.
70	62.001	Bid Factor Group Setup	David Best	100	No using this until bid factor setup is more fully understood and used by buyers.
71	63.001	Constraints Setup	David Best	100	Not setting up any constraints in Phase 1.
72	64.001	Bidder Group Setup	David Best	100	Available but could not finish a bidder group setup because of an error message saying that I did not have the correct user preferences. Note: Defining User Preferences is not done until task # 76, which is the last task.
73	65.001	Standard Comments Type	David Best	100	Set up Type NAS: Not As Specified
74	66.001	Standard Comments	David Best	100	
75	67.001	Document Association Rules	DLB`	100	
76	68.001	Purchasing Definition	David Best	100	Set up FSU01 as the SS Unit
77	69.001	Ship To Locations	DLB	100	

Sheet1 (2) / Sheet1 / Sheet2 / Sheet3
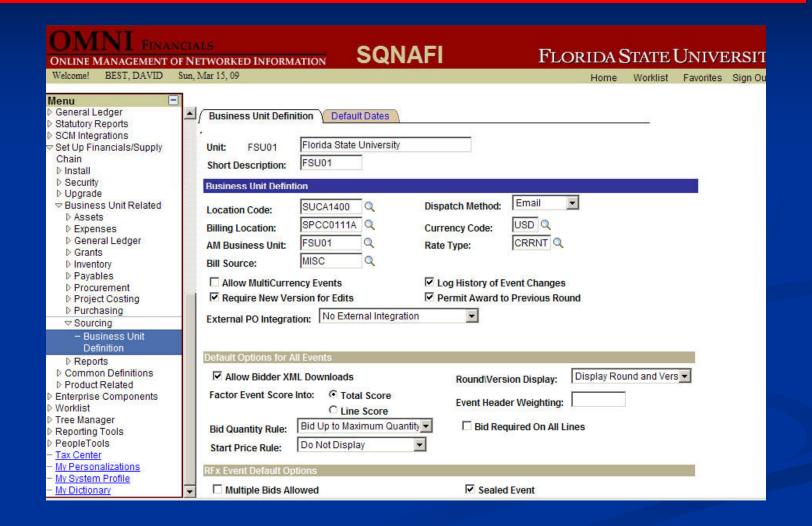
ERDs

Configuration

Configuration

- BU Setup

- Define User Preferences

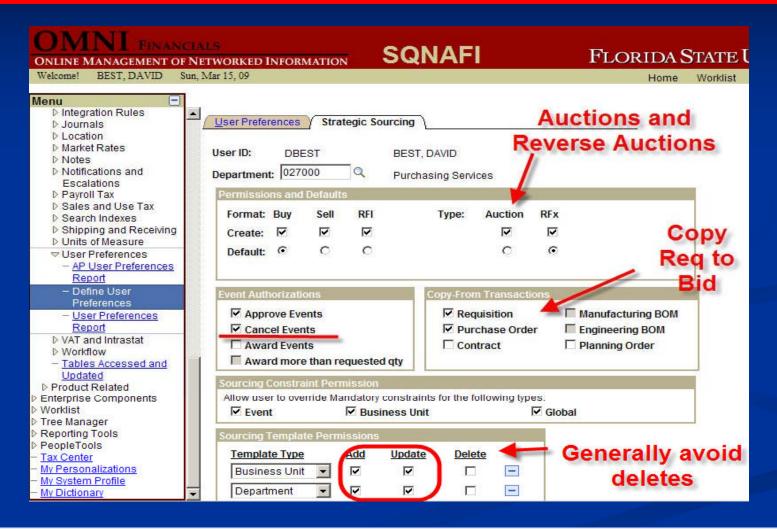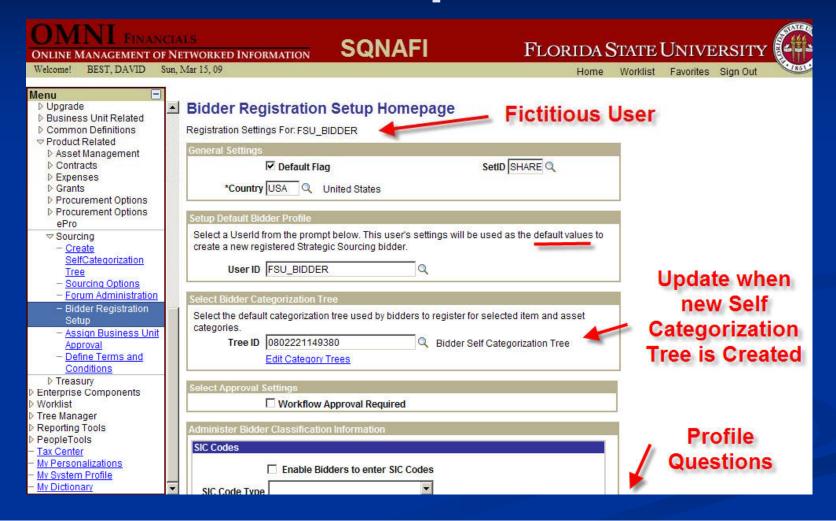- Bidder Registration Setup

BU Definition

Define SS User Preferences
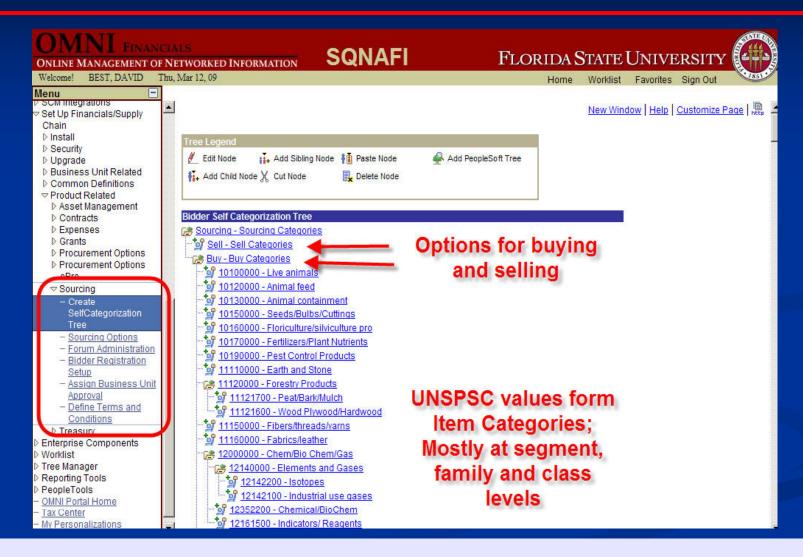
Bidder Registration Setup

Build Categorization Tree

- **Tree Manager**
  - *New Security Roles*
  - *Self Categorization Tree*

- **UNSPSC Structure**
  - *Hierarchical Taxonomy for Roll Ups*
  - *1,350 Item Category Codes for eProcurement*
  - *407 Bidder Self Categorization Codes*
    - Buyers Finalize Category Codes

SelfCategorization Tree

Goal # 1

Store Bidder records and self-categorization codes

Import Legacy Bidders

- **Obtain Master File from Hosted Application**
  - *Ownership*
  - *17,905 Bidder Records for IK*

- **Cleanse and Organize Bidder Data**
  - *Remove Duplicate Bidders*
    - No Unique Identifier
  - *Determine Requirements for Valid Bidders*

Minimum Requirements

- *Original IK Bidder File*   *17,905*
- *All with an Email Address*   *5,941*
- *Email and Address*   *5,862*
- *Email, Address & Phone*   *5,797*
- *Email, Address, Phone, Contact*   *4,395*
- *Email, Complete Address, Phone, Contact*

3,921

Take Out the Garbage

- **Invalid Email Addresses**
  - *Format*
  - *Domain*
- **Invalid Phone or Fax Number**
- **Invalid Government Classification**
- **No Commodity Classification**

Identify Required Fields

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Identify Required Fields

	A	B	C	D	E	F
	Field	**Required**	**Default Setting**	**Load From IK Sheet/Column**	**IK Column Description**	**Comments**
48						
49	Company	Y	N/A	Data/F	Company Name	IK has no naming conventions
50	URL	N	N/A	Data/F	Url	
51	First Name	Y	N/A	Data/H	Full Name	Column H has First, Last, and Prefix in one field. How should this be split? Also, many bidders have "Primany Contact" as the contact name.
52	Last Name	Y	N/A	Data/H	Full Name	Ditto M75
53	Title	N	N/A	Data/I	Title	Mostly blank in IK data
54	Email ID	Y	N/A	Data/T	Email	Need cleanup on syntax
55	Telephone	Y	N/A	Data/P	Phone 1	IK data inconsistantly formated. Some have extension in same field as area code, exchange, number. Home or Work. Some have 2 periods in format others have only one period.
56	Ext	N	N/A	Data/P	Phone 1	Ditto M79
57	Fax	N	N/A	Data/R	1	IK data inconsistantly formated. Some have extension in same field as area code, exchange, number.
58	User ID	Y	TBD			TBD: need convention for creating bidder User ID
59						
60	Currency Code	N	USD			
61						

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Look Ahead

Question: Should bidder records be added to PSOPRDEFN and PSOPRALIAS?

PSOPRDEFN & PSOPRALIAS

OPRID	VERSION	OPRDEFNDESC	EMPLID	EMAILID	OPERPSWD	ENCRYPTED
BID0000105	1	BRIAN SHEA		RFP@INDUSTRIALSOLU TIONSGROUP.NET	5JSOsHwlGbMYNBEsb/ dfGCvFgMw=	1
BID0000106	1	ROBERT BRAGAGLIA		sales@xicomputer.com	kLEJw3dmcvN3a2zms1 UC0E9Yme4=	1
BID0000107	1	PRIMARY CONTACT		INFO@1-888- MAGNETS.COM	kLEJw3dmcvN3a2zms1 UC0E9Yme4=	1
BID0000108	1	PRIMARY CONTACT		INFO@101PHONES.CO M	kLEJw3dmcvN3a2zms1 UC0E9Yme4=	1
BID0000109	1	STEPHEN DETTON		SALES@10-S.COM	kLEJw3dmcvN3a2zms1 UC0E9Yme4=	1

OPRID	OPRALIASVALUE	EMPLID	CUST_ID	VENDOR_ID	BIDDER_ID
BID0000445	0000000445				0000000445
BID0000446	0000000446				0000000446
BID0000447	0000000447				0000000447
BID0000448	0000000448				0000000448
BID0000449	0000000449				0000000449

Map Data to Bidder Tables

- **Source Date Files**
  - *^ Delimited Spreadsheet*
  - *Bidder UNSPSC in DAT file*
- **Target Sourcing Tables**
  - *AUC_BIDDER_HDR*
  - *AUC_ADDRESS_HDR*
  - *AUC_USER_CONTCT*
  - *AUC_BID_SLF_CAT*
  - *FSU_AUC_GOV_CER*

Specification Document

Conversion Flow, Systems

- *Source(s):* IK bidder records in Excel spreadsheet.
- *Target(s):* AUC_BIDDER_HDR, AUC_ADDRESS_HDR, BIDDER_ID_NBRS, AUC_USER_CONTCT, AUC_BID_SLF_CAT, AUC_CONTACT_HDR

Assumptions

- IK bidder records can be loaded into OMNI AUC bidder files using CI or App Engine processes.
- The processes can perform formatting and editing as described below.

Dependencies

- Clean up and preparation of the IK bidder by the Purchasing Dept prior to loads.

Source Data Extraction

Selection Criteria
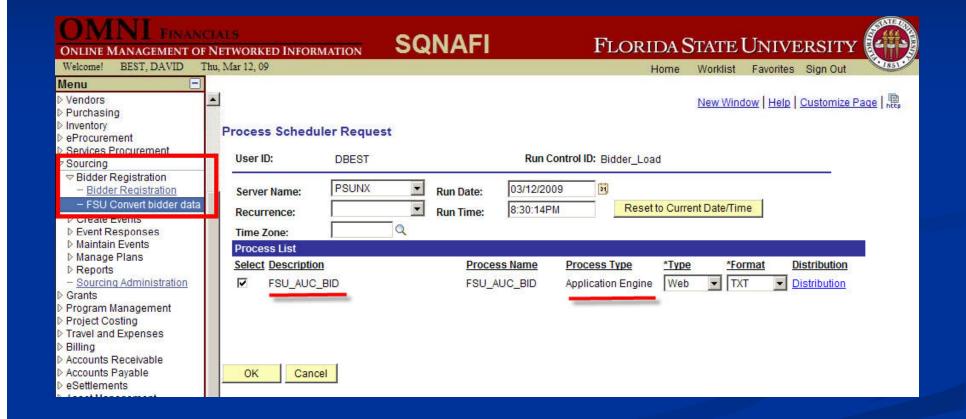
- Excel spreadsheet (See FSU_BID_IKEY_20071206)

Formatting Rules

- In Step 1, All IK bidders will be loaded as Bidder Type "Business" (default)
- In Step 1, All IK bidders will be loaded as "Selling goods/Services" (default)
- In Step 2, Company names longer than 40 characters will be truncated.
- In Step 2, the distinction in the IK data for "Work" or "Mobile" phone numbers will be disregarded. Also, we will not attempt to extract extensions from the single Phone1 field for the IK data. Instead, the load will use only the area code, exchange, and number, (numbers) as separated in the cell by periods.

FSU Conversion Specification Master.doc   Page 4 of 9

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Build Process and Load Data

Build Process and Load Data

■ Application Engine Process
  ■ *Defaults*
  ■ *Order of Precedence*
  ■ *Edits*
  ■ *Truncations*
  ■ *Convert*
  ■ *Generate*

Build Process and Load Data

■ Test and Validate

- *Control Report and Error Handling Log*
- *Start Small*
- *Iterative Process*

1,791 Valid Vendors Loaded

Goal # 2

Employee Bidder Management
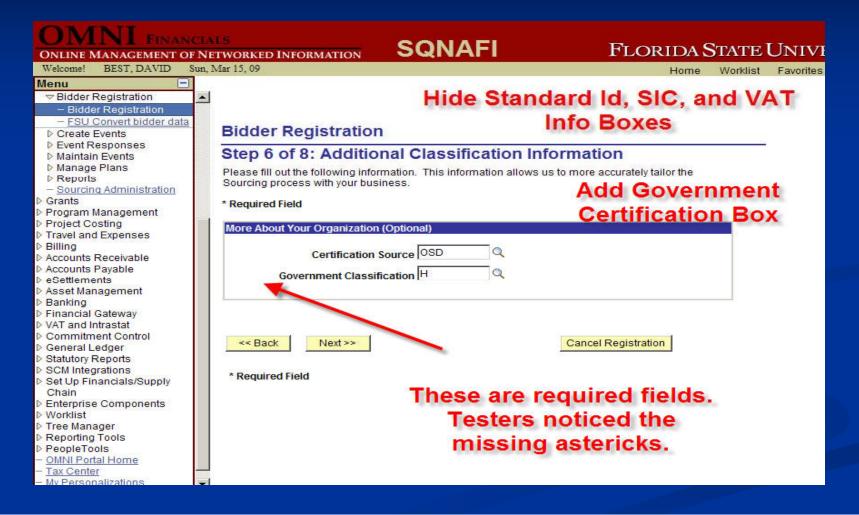
- Modify Bidder Registration
- Modify Maintain Bidder

Modifications to Bidder Registration

- Provide staff access to online Bidder Registration via the employee portal
- Auto-generate sequentially numbered and formatted user ids
- Auto-assign a user password
- Block email notification approval message

Modifications to Bidder Registration

- **Create Page Modifications**
  - *Hide and Grey-out fields*
  - *Change selected fields to required status*
  - *Set Defaults to aid data entry*
- **Change Additional Classification Numbers**
  - *Remove Standard ID, SIC, and VAT information*
  - *Add FSU_AUC_GOV_CER box*

Modifications to Bidder Registration

Modifications to Bidder Registration

New custom table: FSU_AUC_GOV_CER

SETID	BIDDER_ID	EFFSEQ	EFFDT	GOV_CLASS	CERTIF_SOURCE
SHARE	0000000179	1	2008-02-25	C	NONE
SHARE	0000000180	1	2008-02-25	R	NONE
SHARE	0000000181	1	2008-02-25	M	OSD
SHARE	0000000182	1	2008-02-25	A	NONE
SHARE	0000000183	1	2008-02-25	A	NONE
SHARE	0000000184	1	2008-02-25	C	NONE
SHARE	0000000185	1	2008-02-25	A	NONE
SHARE	0000000186	1	2008-02-25	A	NONE
SHARE	0000000187	1	2008-02-25	O	NONE
SHARE	0000000188	1	2008-02-25	A	NONE
SHARE	0000000189	1	2008-02-25	A	NONE
SHARE	0000000190	1	2008-02-25	C	NONE
SHARE	0000000191	1	2008-02-25	A	NONE

Maintain Bidder

- Set up Staff as Bidder Registration Users
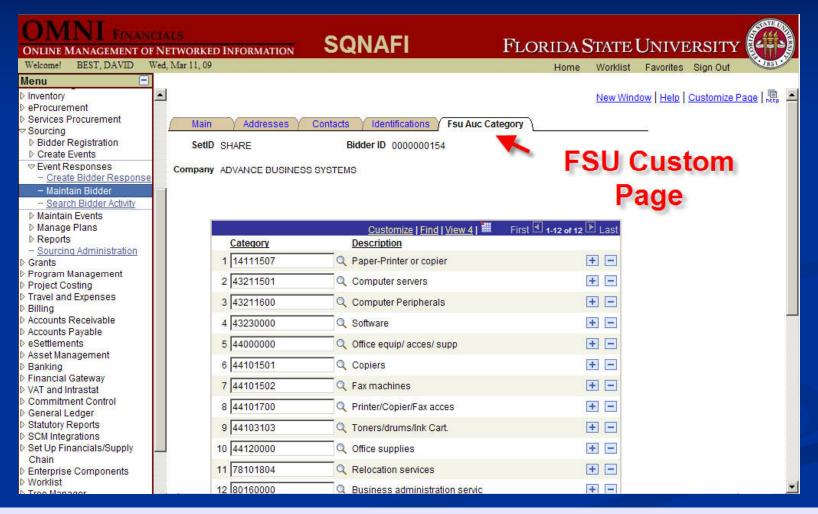- Modifications to Component
- Customization for Category Maintenance
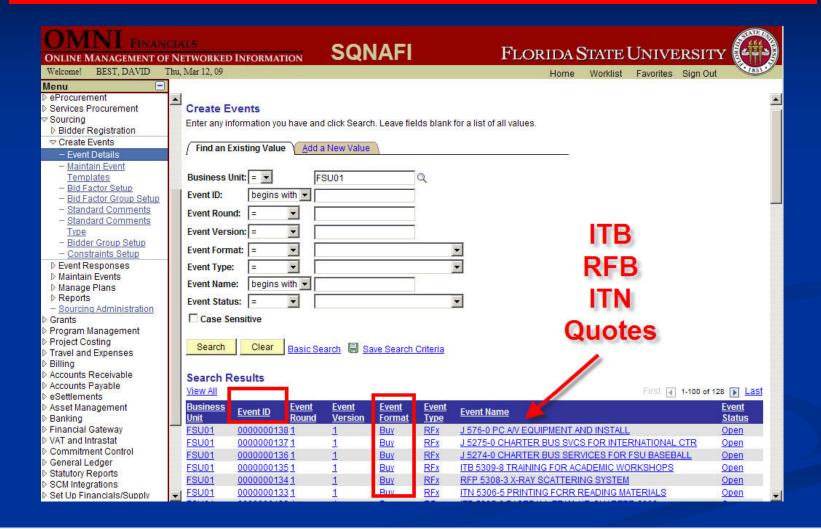
Modified Bidder ID Page

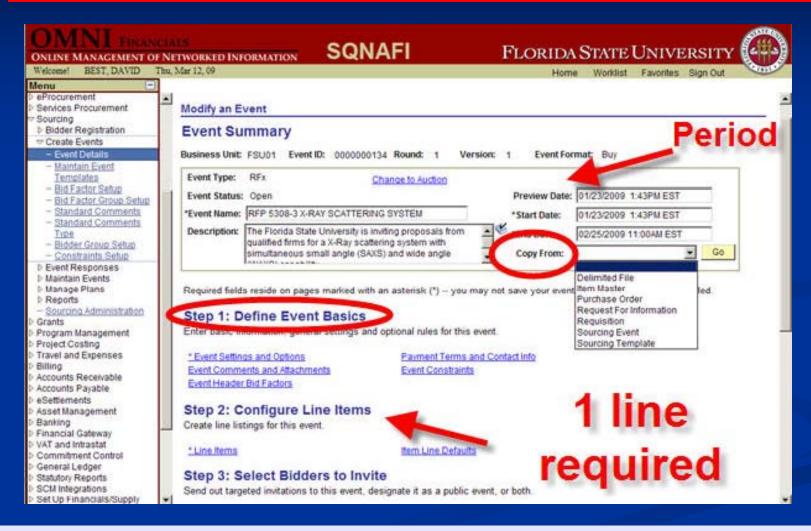# Modified Bidder ID Page

Goal # 3

Create Bid Events

Create Bid Events

- **Event Naming and Definition**
- **Configure Line Items**
- **Select Bidders to Invite**
  - *Search for Bidders*
  - *Recommend Bidders*
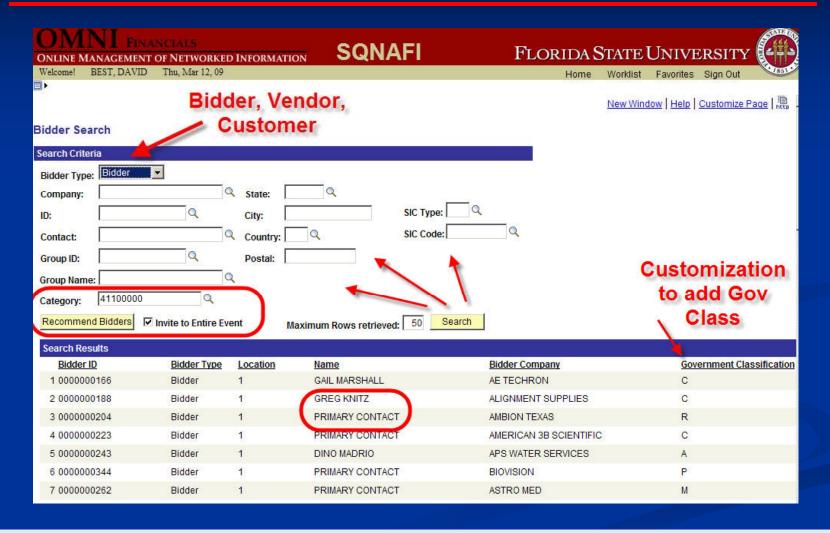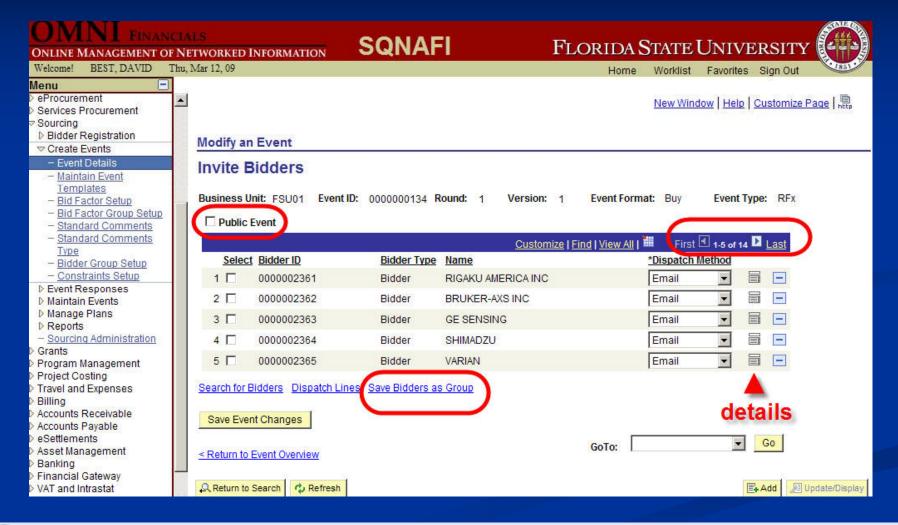 - *Save as Bidder Group*
- **Modifications and Customizations**

Create Events

Create Events

Create Events

Create Events
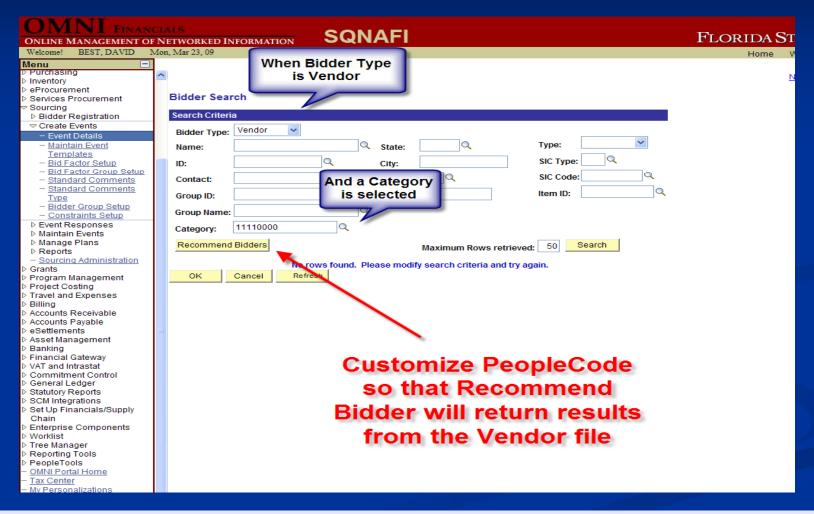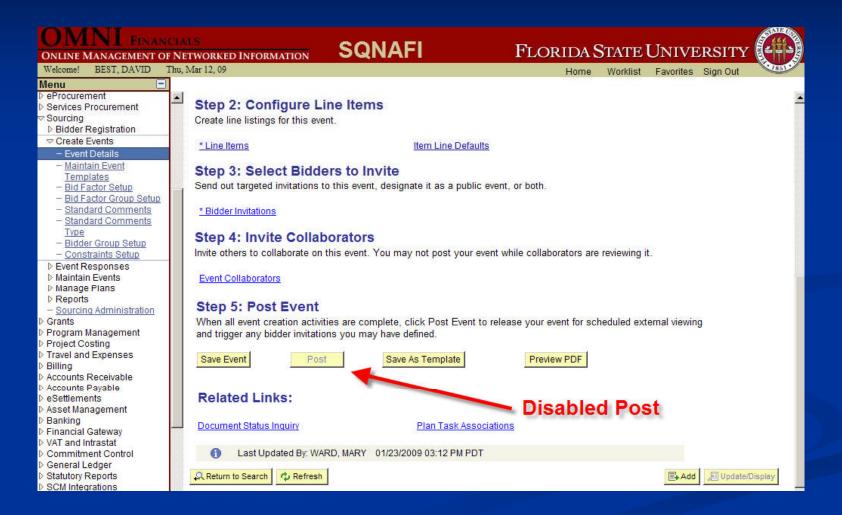
Create Events

Create Events

Custom Security Roles

- **FSU_SOURCING_SUPERUSER**
  - *For ERP*

- **FSU_SOURCING_MANAGER**
  - *For Purchasing Department*

Home Team Technical Tasks

- **Maintain a Stand-Alone Online Bidder Registration Web Site**
  - *Mirrors Sourcing Registration Requirements*
- **Merge Bidder List Into Solicitation Notification Process**
- **Advertise and Administer Bid Events**

Test, Train, Go Live, Stabilize

- Merge testing and training for small group of users.

- Go Live for Central Office only

- Be wary of short stabilization period

Questions?

Contacts

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