Agenda

1. Update: Purchasing, P-Card, MDM, and AP support form
2. Compliance requisition section
3. Supplier scorecards
Update: support form
Support form updates

A mash up of answers to frequently asked questions and a contact form for both departmental users and suppliers.

• Aims to answer your questions without submitting a request.

• This reduces the number of emails received to facilitate quicker responses to the requests that do come in.

• Routes question to the appropriate team based on how form is completed.
Email address is required to receive confirmation email.

Select a topic from the drop-down menu.
Form updates to reveal:

- Help text.
- Links to documentation and/or procedures.
- Option to submit request for additional support (in most cases).
Release date?

Anticipated launch: March 1.

- Infosessions will be held prior to and after form launch to address questions and solicit feedback to help improve the form.

- Lookout for an email with dates and times in early February!
Compliance section
What is it?

• A new, **required**, section of every requisition which captures purchases of restricted items.
  
  • Must answer yes or no prior to document submission.
    
    • If yes, check off restricted items being purchased.
  
  • Document routes to appropriate offices for review.
Compliance Details

Does your order include items from any of the below compliance areas? If Yes, check all that apply.
- Live Animals
- Radioactive Material (e.g. uCi, Ci, mCi, TBq, ATP, &-32P)
- Marketing & Communications

Lines

Guy Brown Products

Network Fulfillment Center 1
7111 Commerce Way, Brentwood, TN 37027 US

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 printer ink</td>
<td></td>
<td>EA</td>
<td>300.00</td>
<td>1</td>
<td>300.00 USD</td>
</tr>
</tbody>
</table>
Almost ready to go! The list below needs to be addressed before the request can be submitted.
- Required field: Does your order include items from any of the below compliance areas? If Yes, check all that apply.
- Required field: Commodity Code (Line 1)
- Required field: Commodity Code (Line 2)

Requisitions: 3115336

2020-11-12 000200838 02

Status: Draft

Compliance

Compliance Details

Does your order include items from any of the below compliance areas? If Yes, check all that apply.

Live Animals
Radioactive Material (e.g. uCi, Ci, mCi, TBq, ATP, &-32P)
Marketing & Communications

Yes
Select from all values...

Required field

Save Cancel

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<th>Product Description</th>
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</tr>
</thead>
<tbody>
<tr>
<td>1 printer ink</td>
<td>more info...</td>
<td>EA</td>
<td>300.00</td>
<td>1 EA</td>
<td>300.00 USD</td>
</tr>
</tbody>
</table>
- Increased transparency in the approvals workflow.
- No longer “stuck with Purchasing” (unless they’re working on it).
Restricted items

Eventually, this section will consist of many types of purchases, but to start it’s limited to:

• Radioactive chemicals
• Animals
• Marketing & communications
Eventually will include…

- Software purchases (currently reviewed on the SSSP form)
- INLOCC
- RPAC
- Tax
- Overseas Studies
- Public Safety
Release date?

- Still under review and testing but coming soon.
- Additional announcements will be sent to the BUY.IU news list and included in the *News & Notes* newsletter.
Supplier scorecards
What is it?

The Supplier Performance Evaluation tool in BUY.IU provides a new way to rate and review supplier performance.

Purchasing has always performed these reviews themselves. This new tool allows department stakeholders to participate in the process.
Process overview

1. Purchasing identifies supplier
2. Evaluation period determined; form created
3. Stakeholders identified and notified via email
4. Feedback received and reviewed by Purchasing
5. Purchasing discusses feedback with supplier
Rate the supplier’s performance in each area during the time period specified.

- Each area has a “Not able to rate” option.
- Ability to leave comments to provide additional context.
Who can see feedback?

• Suppliers can see general feedback scores in their portal.
  • Do not have access to reviewer information or free responses.
• Purchasing will be able to see who responded in what way.
  • This allows them to follow up with additional questions if needed.
Release date?

Departmental staff invitations will begin this spring.

You’ll receive two emails:

1. One from a contract manager in Purchasing who works with the supplier.

2. Another from supplier@iu.edu which contains a unique link to the evaluation.
Questions?