An ePro to eMarket SciQuest Sandwich

Session #26696

March 25, 2009

Anaheim, California

Presenter

- David Best
- Senior ERP Analyst
- Seven Years with ERP
- Past Associate Director of Purchasing
- 42 Year Seminole

Co-Presenter

- Amar Tekriwal
- EPR Analyst IV
- 7 Years as a PeopleSoft Developer

Overview

Florida State University partnered with SciQuest Inc. during 2008 to implement an electronic marketplace that provides users with access to shop among online catalogs and place orders seamlessly using PeopleSoft requisitions, workflow approval, commitment control, and EDX dispatch.

Agenda

The 16 week core project ran concurrently with fiscal year end close and PO rollover, yet was completed successfully and within budget by:

- Controlling the scope of the project;
- Using in-house resources; and
- Leveraging SciQuest's software and project management expertise.

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 an Oracle Database…Go Live on April 6, 2009.

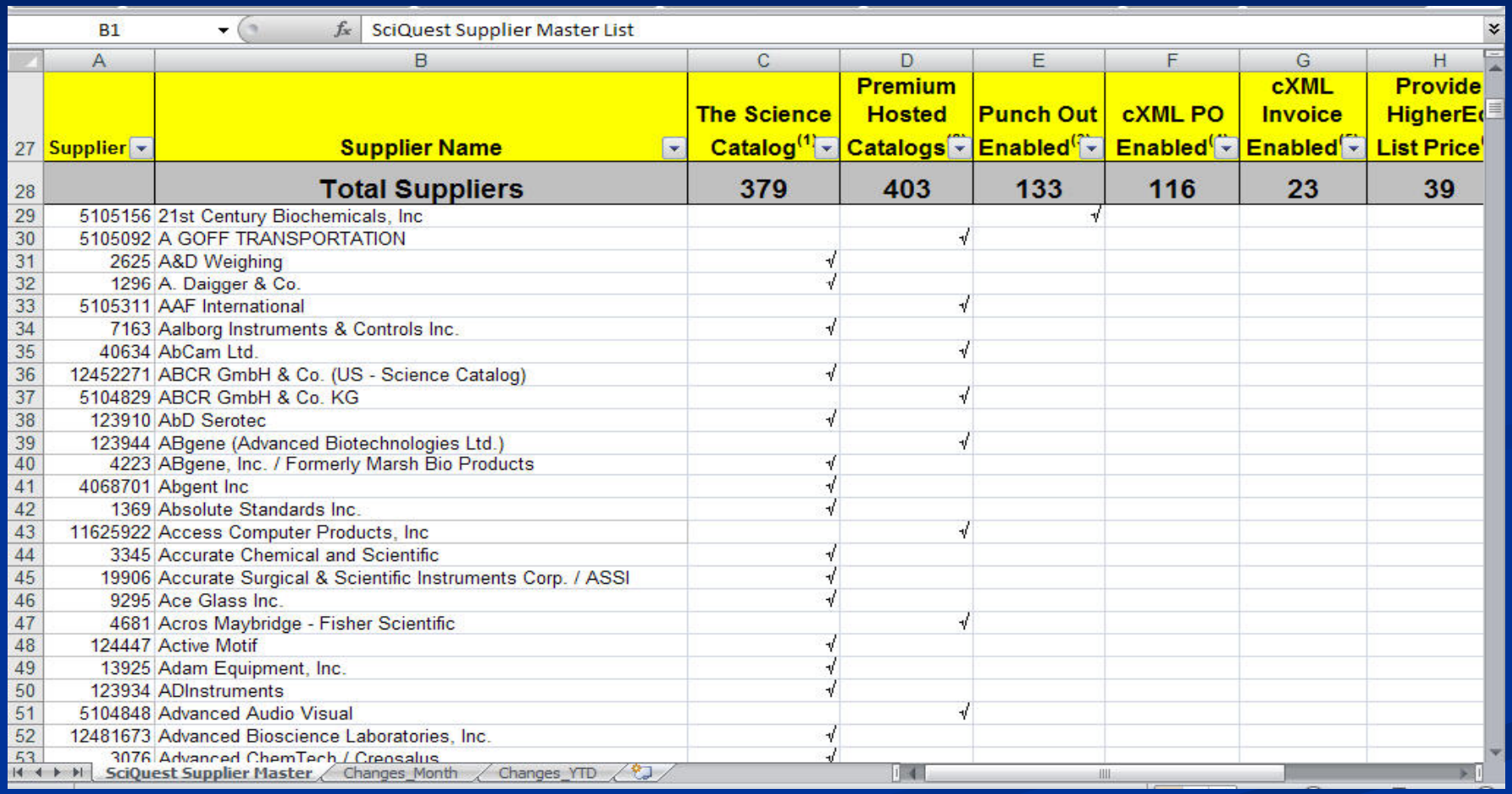
FSU and SciQuest

- Product Research
- Consortium ITN
- Product Licenses
  - *Spend Director, Total of 50 Catalogs*
    - Four Content Packs (10 ea) for hosted and/or Punch-out Catalogs
    - One Science Catalog Pack(10 ea)
    - One Chemical Structure Search Tool
    - One E & I Catalog license
  - *Order Manager*

Project Plan Miles Stones

Planning Session	May 14, 2008
Kickoff	June 5 - 6
Design Session 1	June 19
Design Session 2	July 19
Solution Validation	August 5 - 12
Migration to QA	August 12
User Acceptance Testing	August 19 – September 5
Site Cleanout	September 5
Migration to Production	September 8
Transition to Support	October 6
Campus-wide Rollout	January 23, 2009

Supplier Selection and Enablement



B1 — SciQuest Supplier Master List

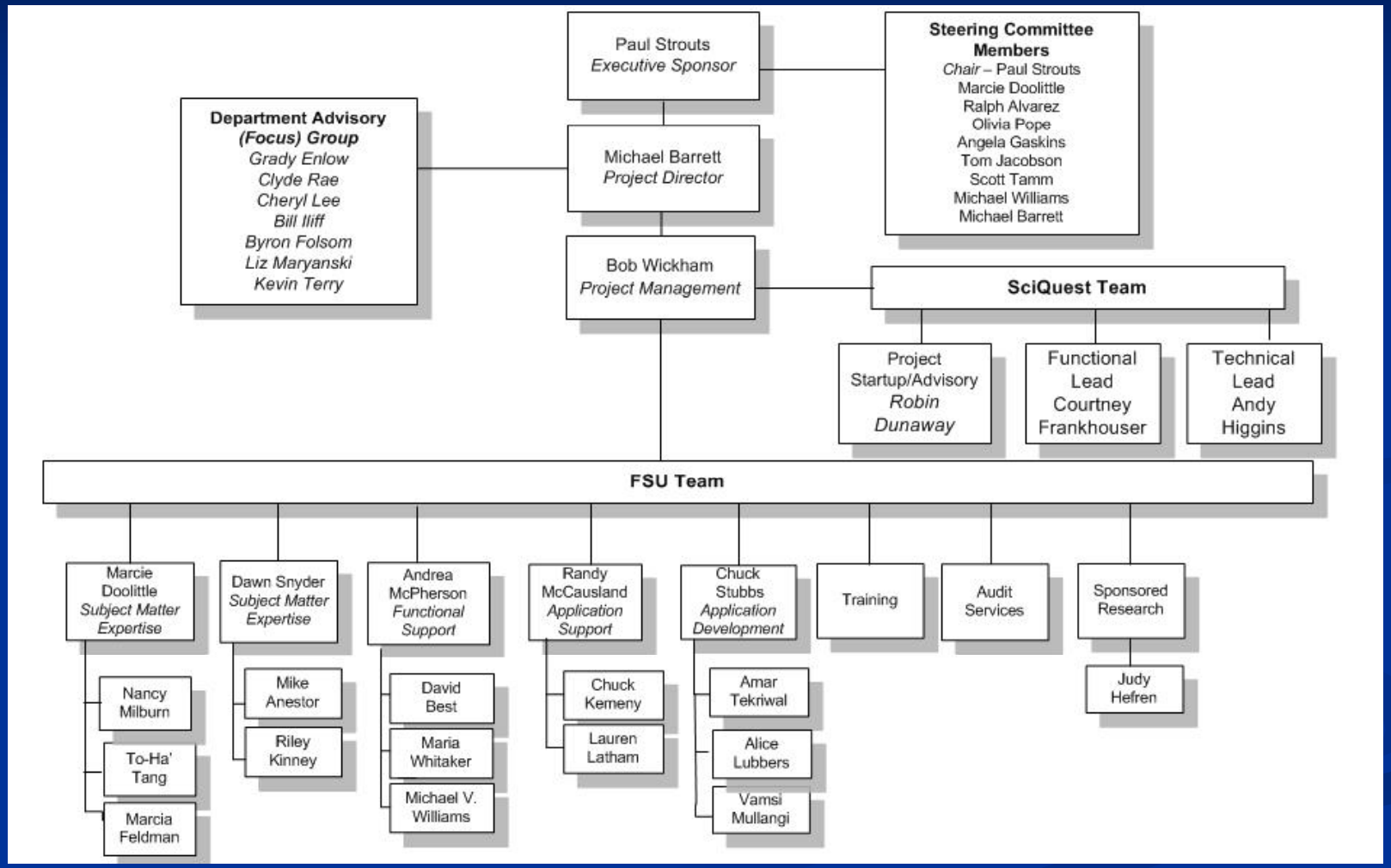
	A	B	C	D	E	F	G	H
27	Supplier	Supplier Name	The Science Catalog(1)	Premium Hosted Catalogs	Punch Out Enabled	cXML PO Enabled	cXML Invoice Enabled	Provide HigherEd List Price
28		**Total Suppliers**	**379**	**403**	**133**	**116**	**23**	**39**
29	5105156	21st Century Biochemicals, Inc			√			
30	5105092	A GOFF TRANSPORTATION		√				
31	2625	A&D Weighing	√					
32	1296	A. Daigger & Co.	√					
33	5105311	AAF International		√				
34	7163	Aalborg Instruments & Controls Inc.	√					
35	40634	AbCam Ltd.		√				
36	12452271	ABCR GmbH & Co. (US - Science Catalog)	√					
37	5104829	ABCR GmbH & Co. KG		√				
38	123910	AbD Serotec	√					
39	123944	ABgene (Advanced Biotechnologies Ltd.)		√				
40	4223	ABgene, Inc. / Formerly Marsh Bio Products	√					
41	4068701	Abgent Inc	√					
42	1369	Absolute Standards Inc.	√					
43	11625922	Access Computer Products, Inc		√				
44	3345	Accurate Chemical and Scientific	√					
45	19906	Accurate Surgical & Scientific Instruments Corp. / ASSI	√					
46	9295	Ace Glass Inc.	√					
47	4681	Acros Maybridge - Fisher Scientific		√				
48	124447	Active Motif	√					
49	13925	Adam Equipment, Inc.	√					
50	123934	ADInstruments	√					
51	5104848	Advanced Audio Visual		√				
52	12481673	Advanced Bioscience Laboratories, Inc.	√					
53	3076	Advanced ChemTech / Creosalus	√					

SciQuest Supplier Master | Changes_Month | Changes_YTD

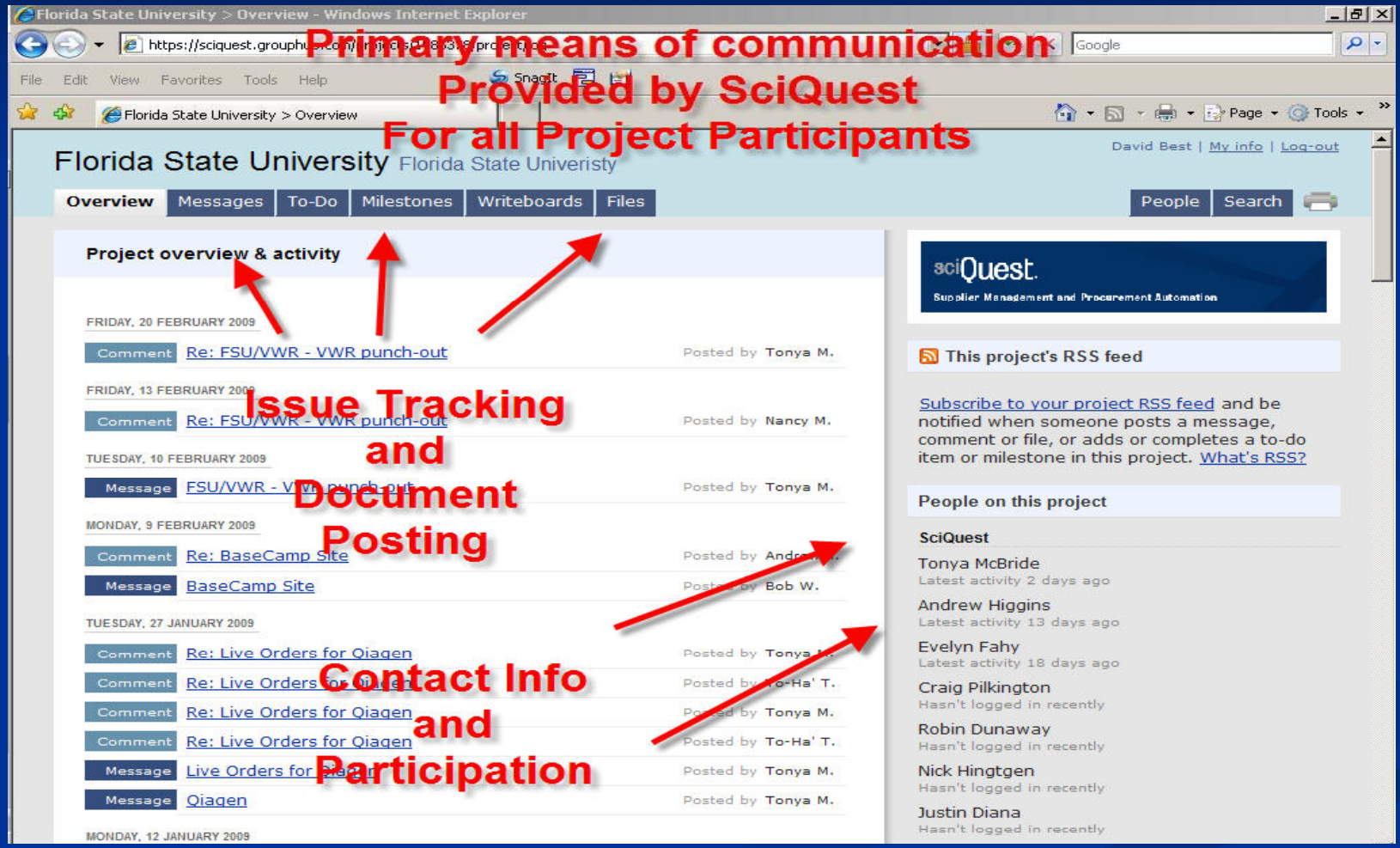
FSU Supplier Recommendations

- *Top 34 Candidates Identified*
  - Spend, Catalog Type, Supplier Capabilities
- *Strategic Sourcing and Contracts*
  - FSU Contracts
  - Piggyback Contracts
  - Documentation and Price/Product Validation
    - Original Catalog Load
    - Update Tool from SciQuest
- *Ongoing Selection and Enablement*

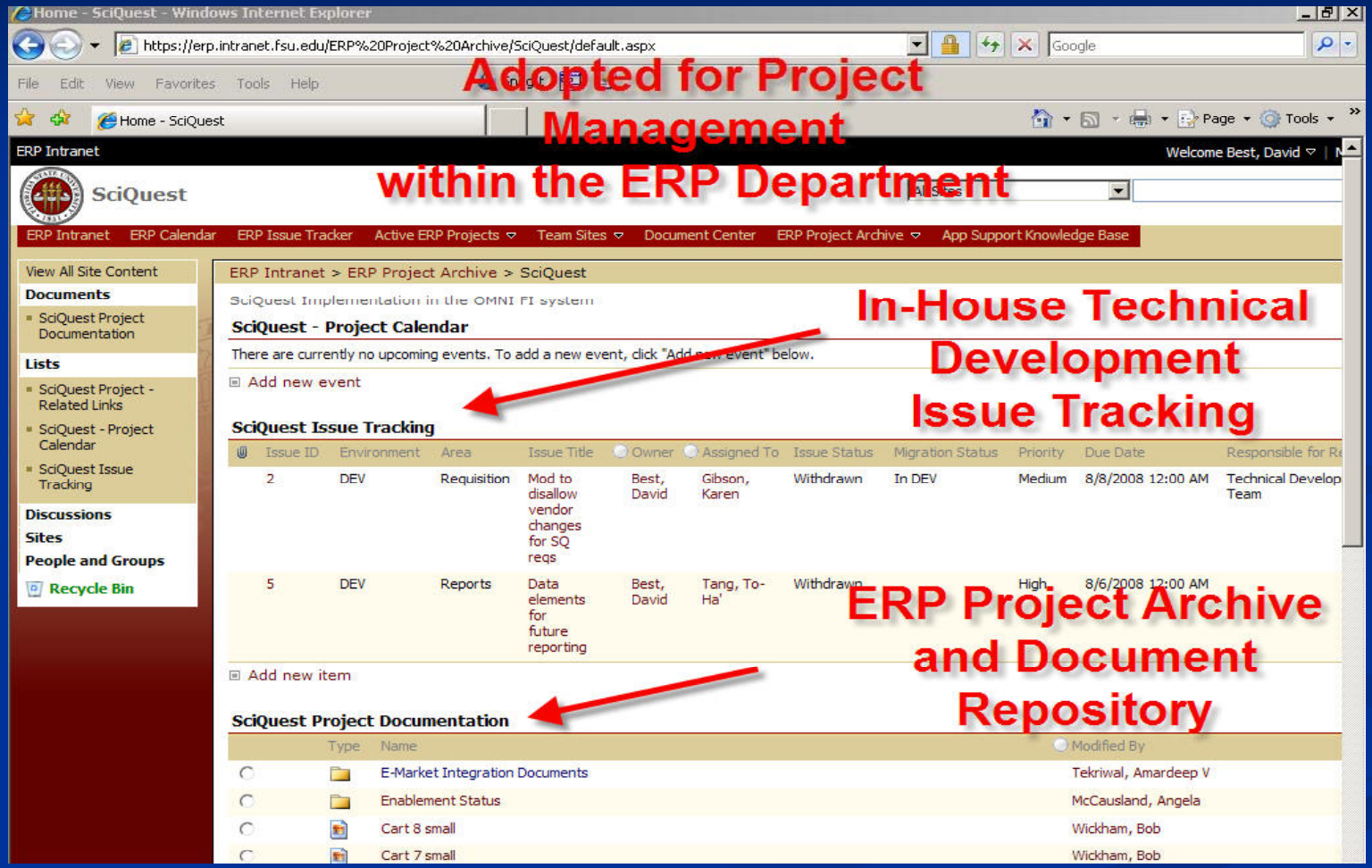
Project Teams and Tools



BaseCamp


Primary means of communication
Provided by SciQuest
For all Project Participants
Florida State University > Overview - Windows Internet Explorer
Florida State University > Overview
Florida State University Florida State Univeristy
David Best | My info | Log-out
Overview
Messages
To-Do
Milestones
Writeboards
Files
People
Search
Project overview & activity
FRIDAY, 20 FEBRUARY 2009
Comment Re: FSU/VWR - VWR punch-out Posted by Tonya M.
FRIDAY, 13 FEBRUARY 2009
Comment Re: FSU/VWR - VWR punch-out Posted by Nancy M.
TUESDAY, 10 FEBRUARY 2009
Message FSU/VWR - VWR punch-out Posted by Tonya M.
MONDAY, 9 FEBRUARY 2009
Comment Re: BaseCamp Site
Message BaseCamp Site Posted by Bob W.
TUESDAY, 27 JANUARY 2009
Comment Re: Live Orders for Qiagen Posted by Tonya M.
Comment Re: Live Orders for Qiagen Posted by To-Ha' T.
Comment Re: Live Orders for Qiagen Posted by Tonya M.
Comment Re: Live Orders for Qiagen Posted by To-Ha' T.
Message Live Orders for Qiagen Posted by Tonya M.
Message Qiagen Posted by Tonya M.
MONDAY, 12 JANUARY 2009
Issue Tracking and Document Posting
Contact Info and Participation
sciQuest
Supplier Management and Procurement Automation
This project's RSS feed
Subscribe to your project RSS feed and be notified when someone posts a message, comment or file, or adds or completes a to-do item or milestone in this project. What's RSS?
People on this project
SciQuest
Tonya McBride
Latest activity 2 days ago
Andrew Higgins
Latest activity 13 days ago
Evelyn Fahy
Latest activity 18 days ago
Craig Pilkington
Hasn't logged in recently
Robin Dunaway
Hasn't logged in recently
Nick Hingtgen
Hasn't logged in recently
Justin Diana
Hasn't logged in recently

SharePoint


Home - SciQuest - Windows Internet Explorer
https://erp.intranet.fsu.edu/ERP%20Project%20Archive/SciQuest/default.aspx
Adopted for Project Management within the ERP Department
ERP Intranet
Welcome Best, David
SciQuest
ERP Intranet | ERP Calendar | ERP Issue Tracker | Active ERP Projects | Team Sites | Document Center | ERP Project Archive | App Support Knowledge Base
View All Site Content
Documents
SciQuest Project Documentation
Lists
SciQuest Project - Related Links
SciQuest - Project Calendar
SciQuest Issue Tracking
Discussions
Sites
People and Groups
Recycle Bin
ERP Intranet > ERP Project Archive > SciQuest
SciQuest - Project Calendar
There are currently no upcoming events. To add a new event, click "Add new event" below.
Add new event
In-House Technical Development Issue Tracking
SciQuest Issue Tracking
Issue ID | Environment | Area | Issue Title | Owner | Assigned To | Issue Status | Migration Status | Priority | Due Date
2 | DEV | Requisition | Mod to disallow vendor changes for SQ reqs | Best, David | Gibson, Karen | Withdrawn | In DEV | Medium | 8/8/2008 12:00 AM | Technical Develop Team
5 | DEV | Reports | Data elements for future reporting | Best, David | Tang, To-Ha' | Withdrawn | | High | 8/6/2008 12:00 AM
Add new item
ERP Project Archive and Document Repository
SciQuest Project Documentation
Type | Name | Modified By
E-Market Integration Documents | Tekriwal, Amardeep V
Enablement Status | McCausland, Angela
Cart 8 small | Wickham, Bob
Cart 7 small | Wickham, Bob

Integration Overview

- Direct Connect and PV Dispatch
  - *Implementation Standards*
  - *EDX Dispatch to Order Manager*
- Integration Broker
  - *Technological Backbone of Direct Connect*
  - *Facilitates Synchronous Messaging*
    - Message Structure
    - Message Format
    - Transport Disparities

Integration Overview Continued

- webMethods
  - *Third party software*
  - *Integrates business processes through real-time, controlled, and secure connections*
  - *Hub architecture*
  - *Reformat/map data for SciQuest*

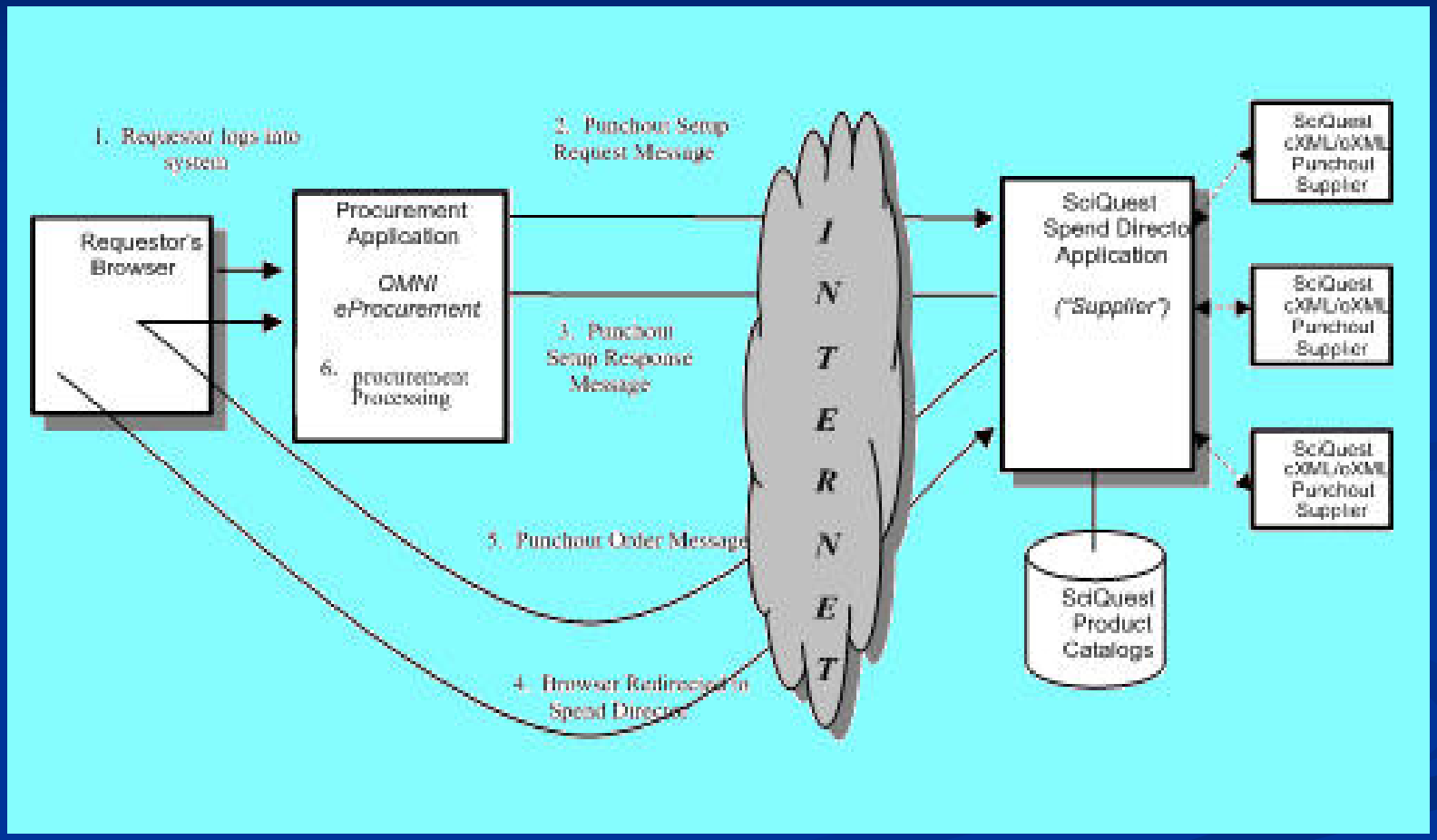
LDAP Integration for User Authentication

- Standard Steps
  - *User logs into SciQuest via application login page.*
  - *Enters username and password*
  - *If authentication is LDAP or if user does not exist, a request is sent to the customers LDAP server.*
  - *If successful, user is redirected to Selectsite*

LDAP Integration for User Authentication

- FSU Steps
  - *User Logs into OMNI and punches out to SciQuest*
  - *Automatically Create Users upon first login and successful LDAP authentication*
  - *Automatically Approve Users*
  - *Session and Inactivity Timeouts*
  - *User Information*

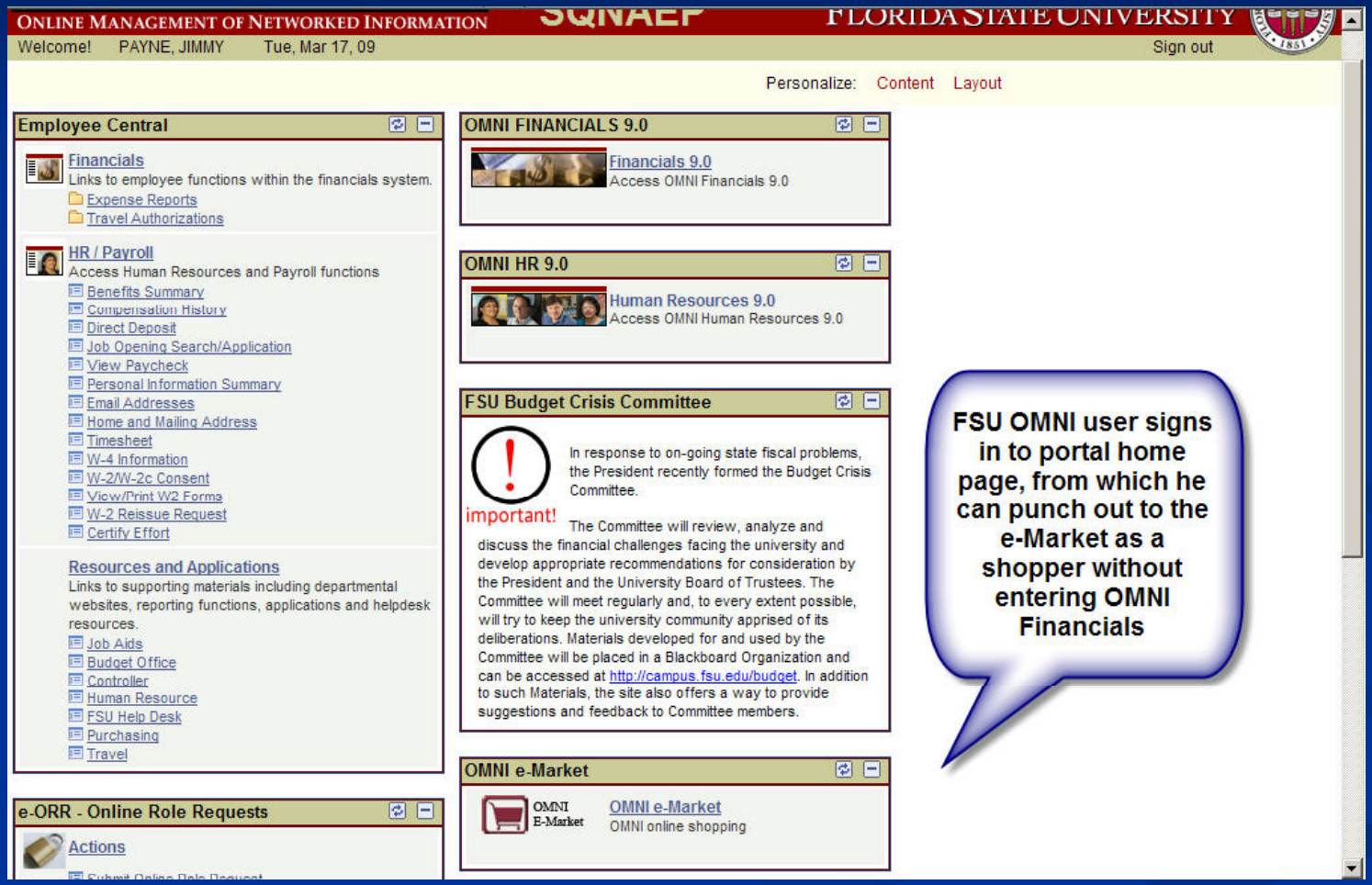
Punch-in and Cart Return



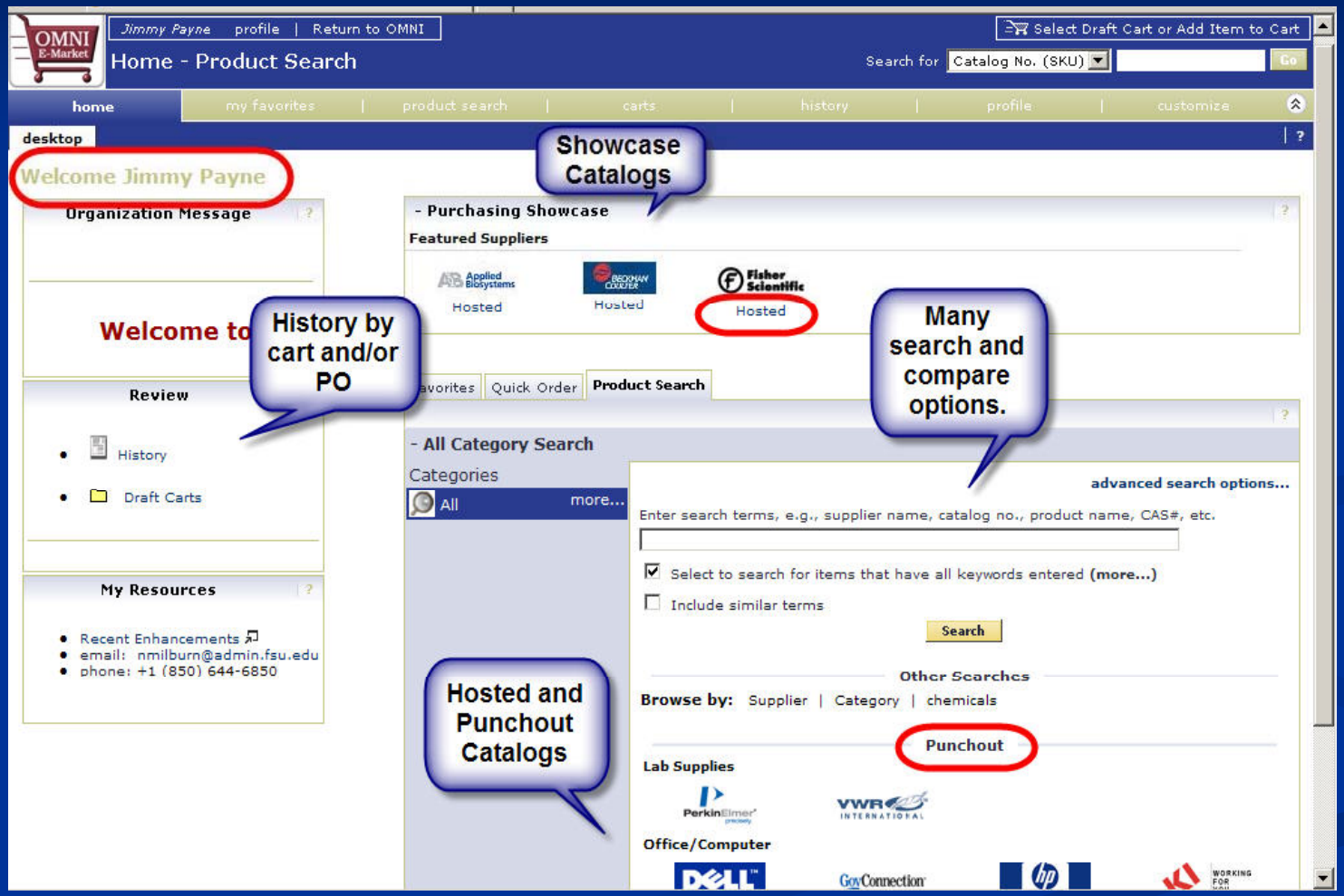
How It Looks Online

- Shopper Signs in to OMNI and Punches Out to SciQuest
- Shops from among hosted or punchout catalogs
- Saves and assigns a cart
- Requester Punches Out and Returns Cart to OMNI Requisition

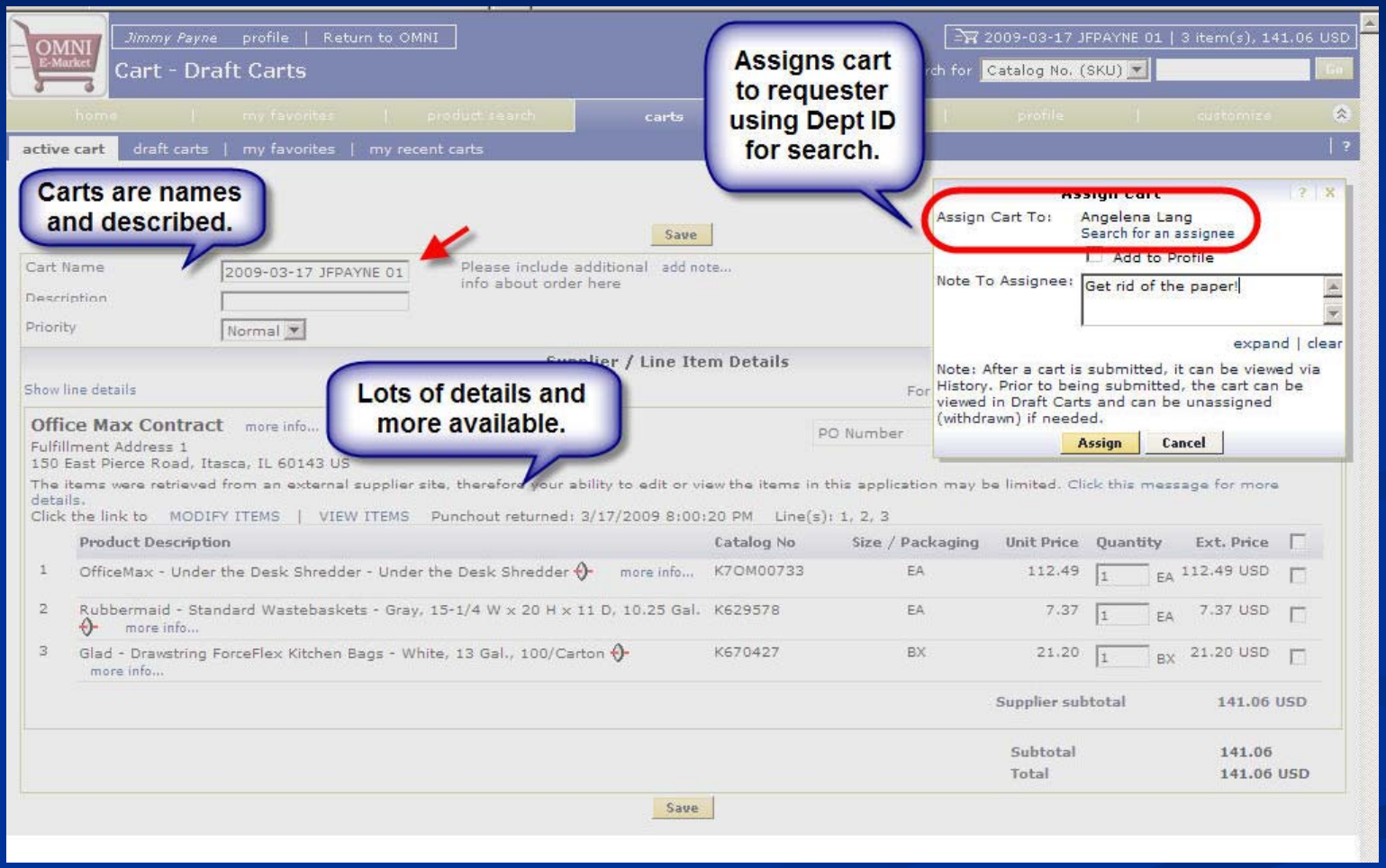
How It Looks Online



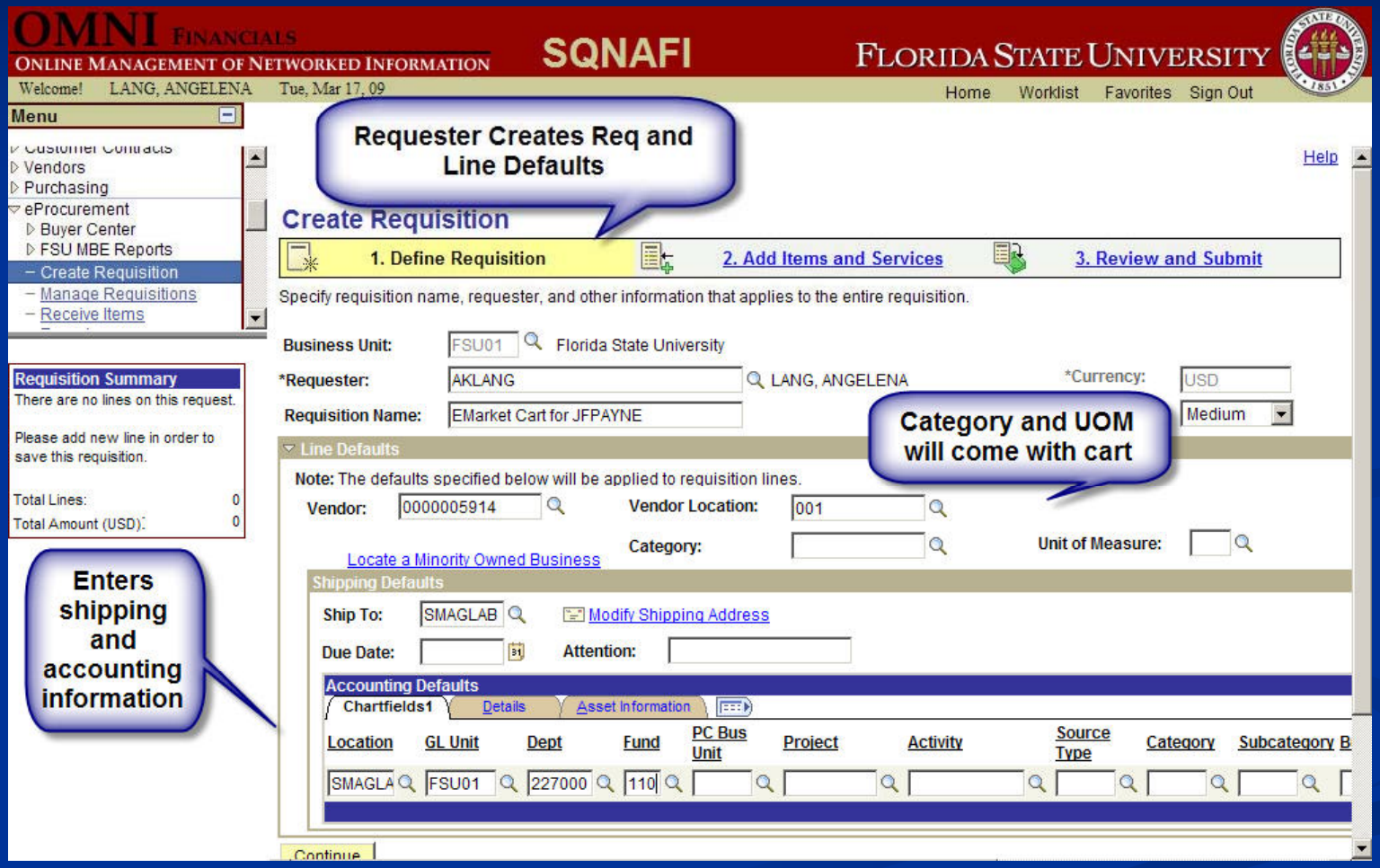
How It Looks Online



How It Looks Online



How It Looks Online



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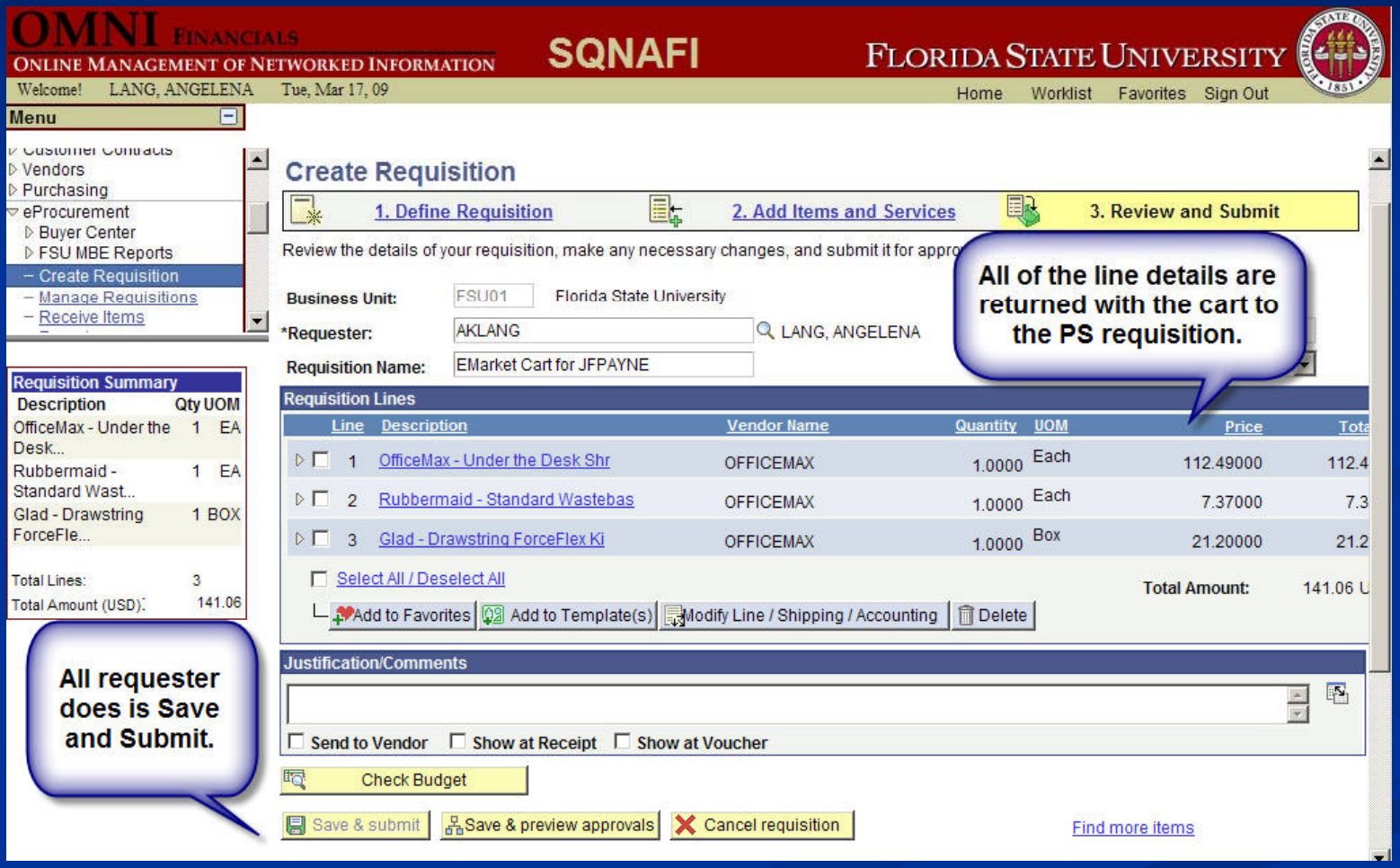


Punch-in and Cart Return

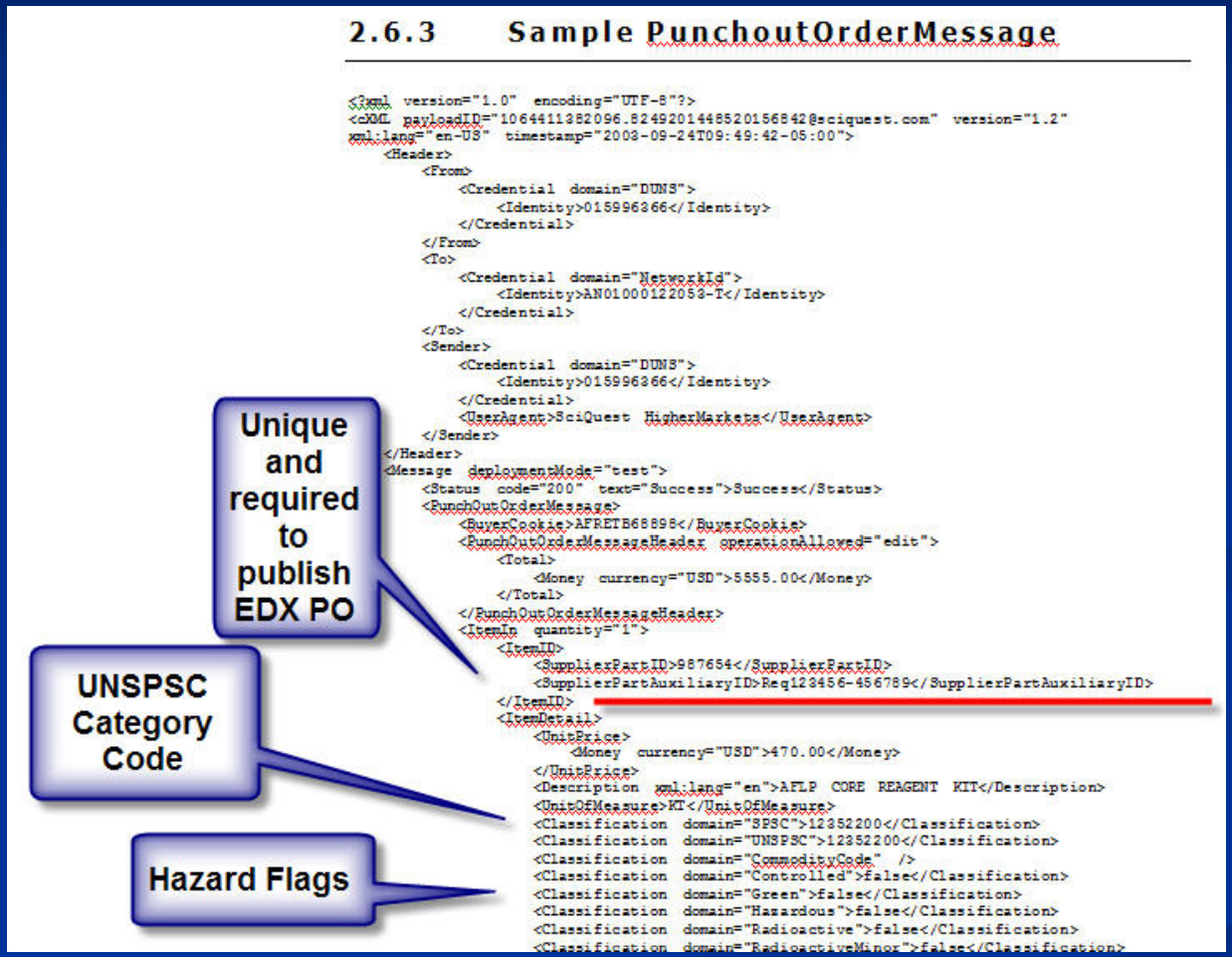
- Givens
  - *cXML 1.2 standard (Ariba's standard format for exchanging XML documents)*
  - *UNSPSC used as commodity code for PunchOutOrderMessage*
- PunchoutSetup Request
- PunchoutSetup Response
- Cart return

Punch-in and Cart Return

Sample of elements contained in a Punchout Cart Return Message

cXML Field Name	Spend Director Usage
BuyerCookie	Unique session id established by PeopleSoft in the PunchOutSetupRequest
PunchOutOrderMessageHeader/Total/Money	The total value of the line items included in this shopping cart
ItemIn quantity=""	The returned value indicates the quantity of item indicated by the ItemIn details.
ItemIn/ItemID/SupplierPartID	Value from supplier to identify item
ItemIn/ItemID/SupplierPartAuxiliaryID	This field should be passed back for edits in subsequent request messages
ItemIn/ItemDetail/UnitPrice	The price of a single unit of the item
ItemIn/ItemDetail/Description	The description of the item
ItemIn/ItemDetail/UnitOfMeasure	The unit of measure of the single unit item
ItemIn/ItemDetail/Classification domain="UNSPSC"	The UNSPSC as defined in the hosted catalog system
ItemIn/ItemDetail/Classification domain="SPSC"	The same as UNSPSC as above
ItemIn/ItemDetail/Classification domain="Controlled"	This the product flag for Controlled items
ItemIn/ItemDetail/Classification domain="Green"	This the product flag for Green items
ItemIn/ItemDetail/Classification domain="Hazardous"	This the product flag for Hazardous items
ItemIn/ItemDetail/Classification domain="Radioactive"	This the product flag for Radioactive items
ItemIn/ItemDetail/Classification domain="RadioactiveMinor"	This the product flag for Radioactive Minor items
ItemIn/ItemDetail/Classification domain="SelectAgent"	This the product flag for Select Agent items
ItemIn/ItemDetail/Classification domain="Toxin"	This the product flag for Toxic items
ItemIn/ItemDetail/ManufacturerPartId	The part id from the hosted category as given to SciQuest
ItemIn/ItemDetail/ManufacturerName	The manufacturer name from the hosted category as given to SciQuest
ItemIn/SupplierId domain="DUNS"	The supplier DUNS as defined in the SciQuest hosted category or provided by Florida State University for that specific supplier
Extrinsic Name="CartID"	This field is the internal SciQuest cart id and will need to be passed back in the PO Import
Extrinsic Name="CartLineID"	This field is the internal SciQuest cart line id, and will need to be passed back in the PO Import. This field eliminates the need to pass back additional information about the item ordered in the PO Import and will create a link between the

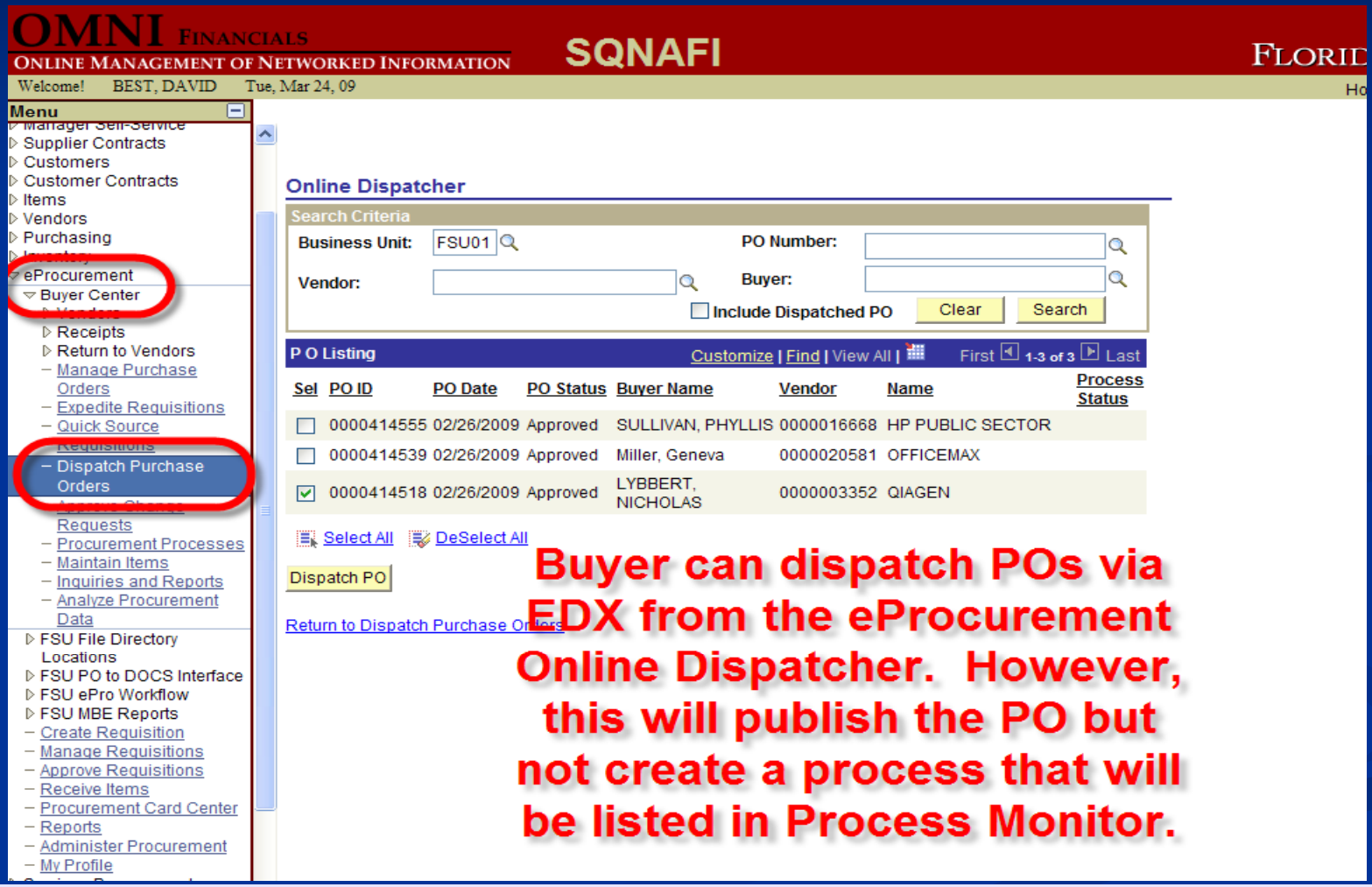
Punch-in and Cart Return



PO Dispatch Via EDX

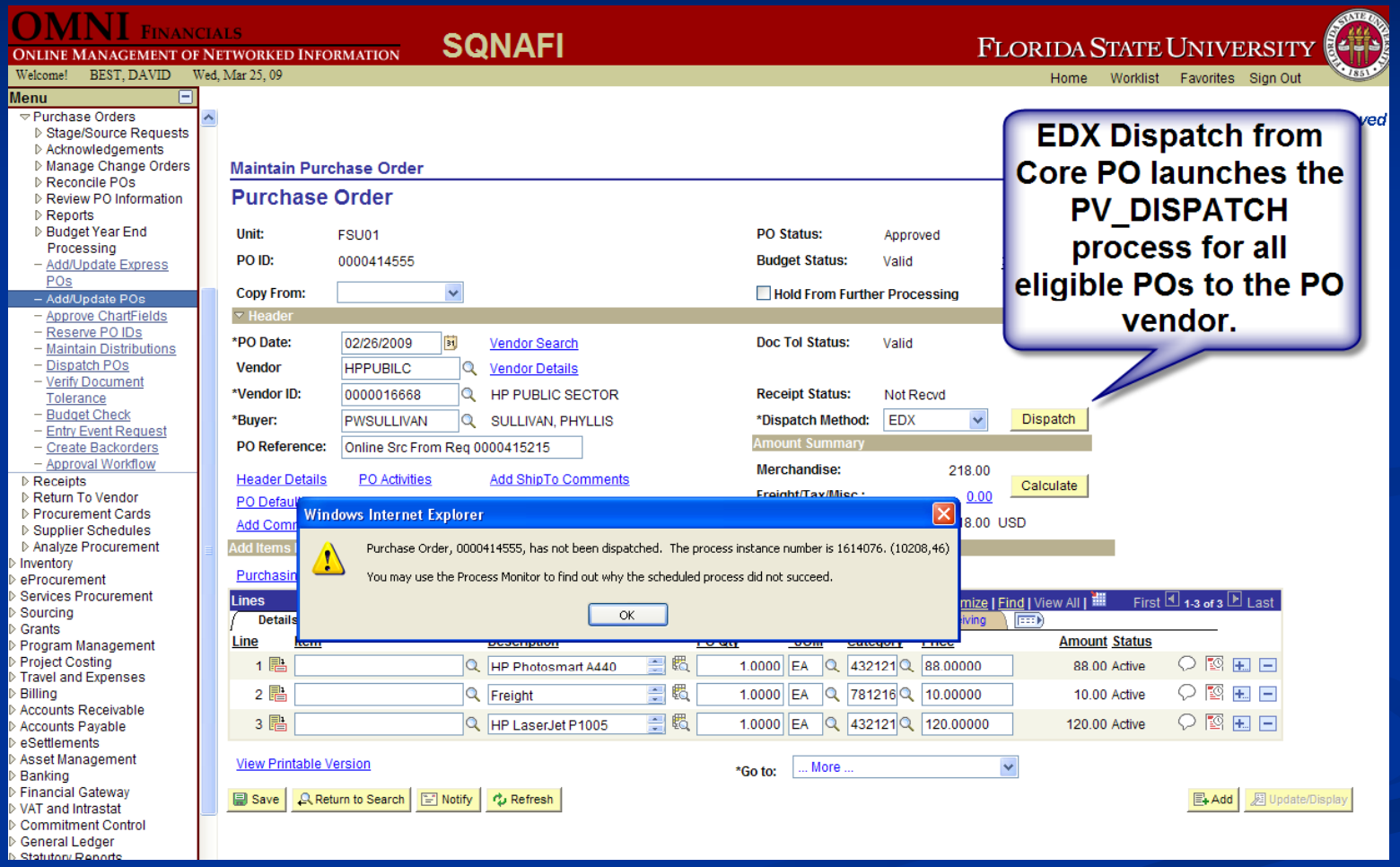
- Online Single PO Dispatch from Core PO or ePro
- Batch Publishing via PV_DISPATCHER
- Monitor EDX Dispatch in ePro and Integration Broker
- Research Sent POs in SciQuest Order Manager

PO Dispatch Via EDX

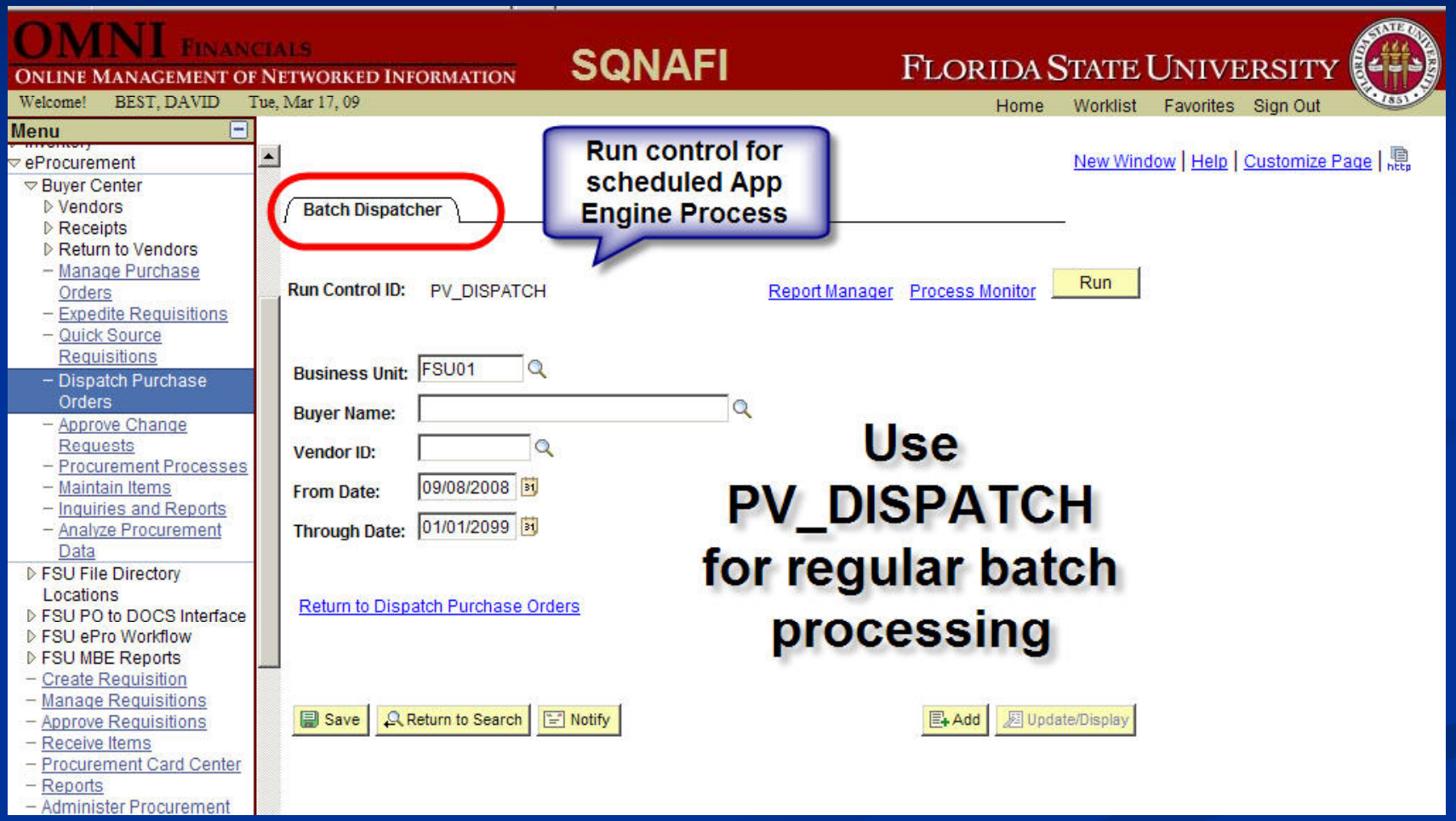


Buyer can dispatch POs via EDX from the eProcurement Online Dispatcher. However, this will publish the PO but not create a process that will be listed in Process Monitor.

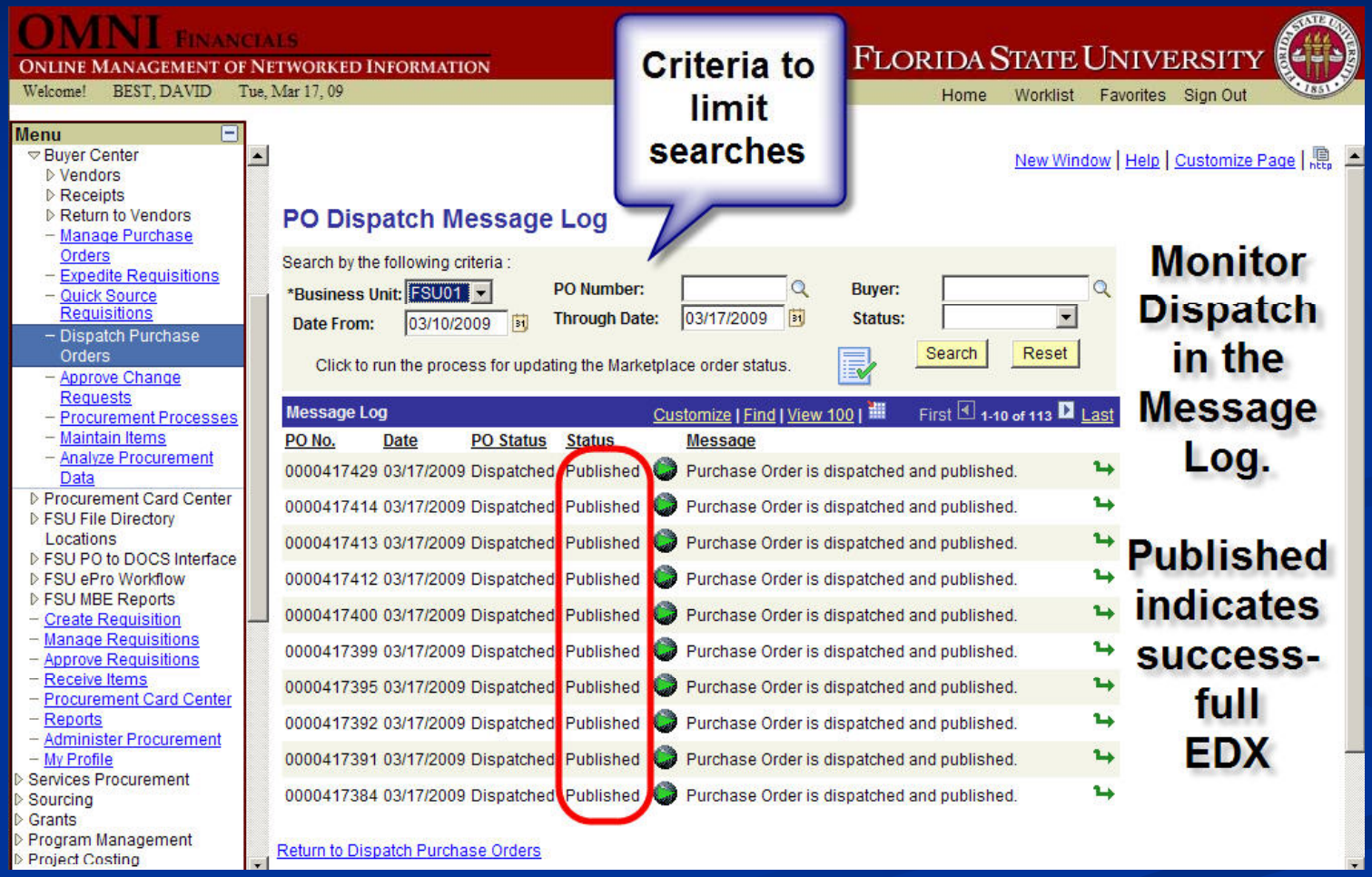
PO Dispatch Via EDX



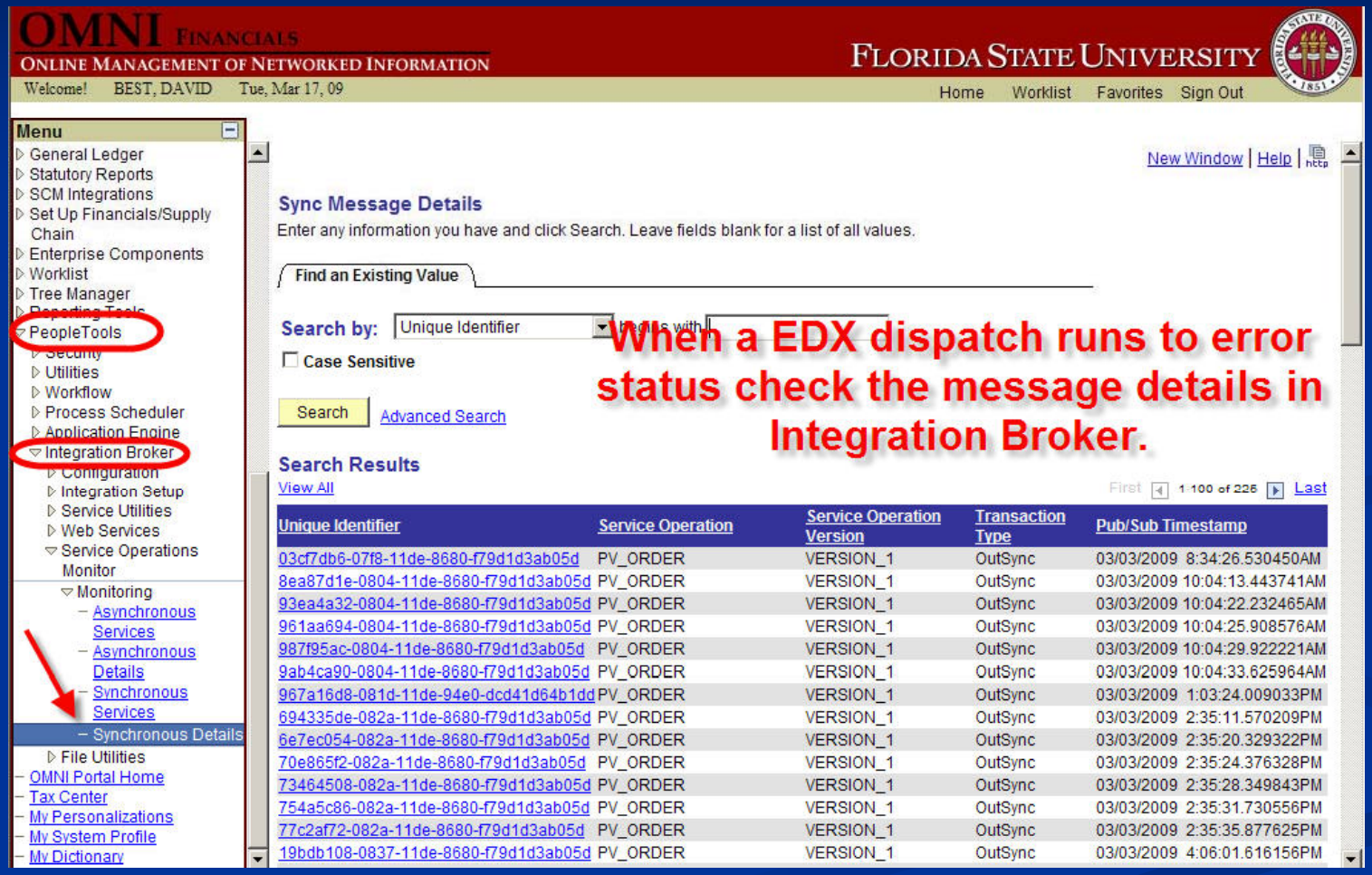
PO Dispatch Via EDX



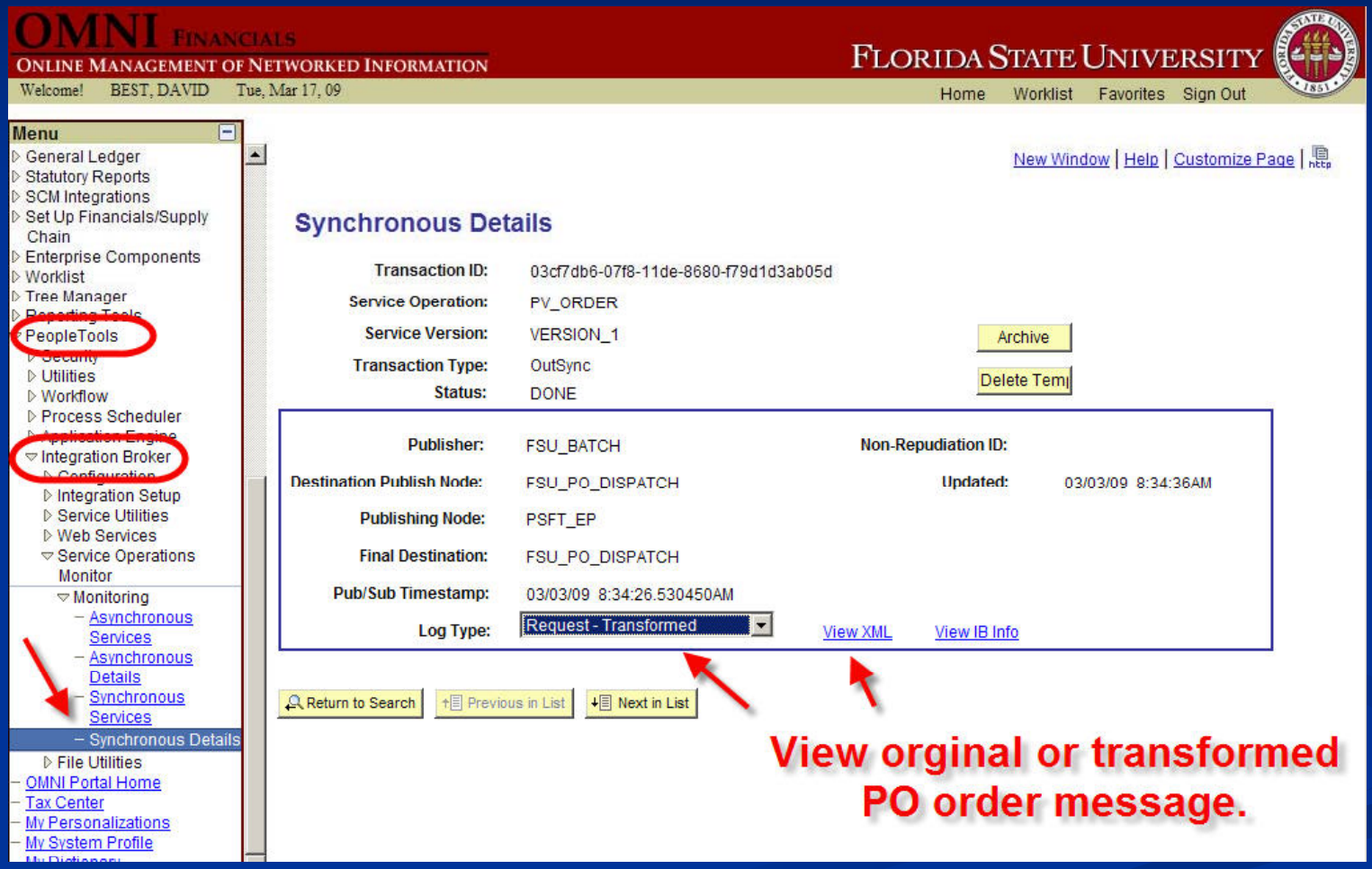
PO Dispatch Via EDX



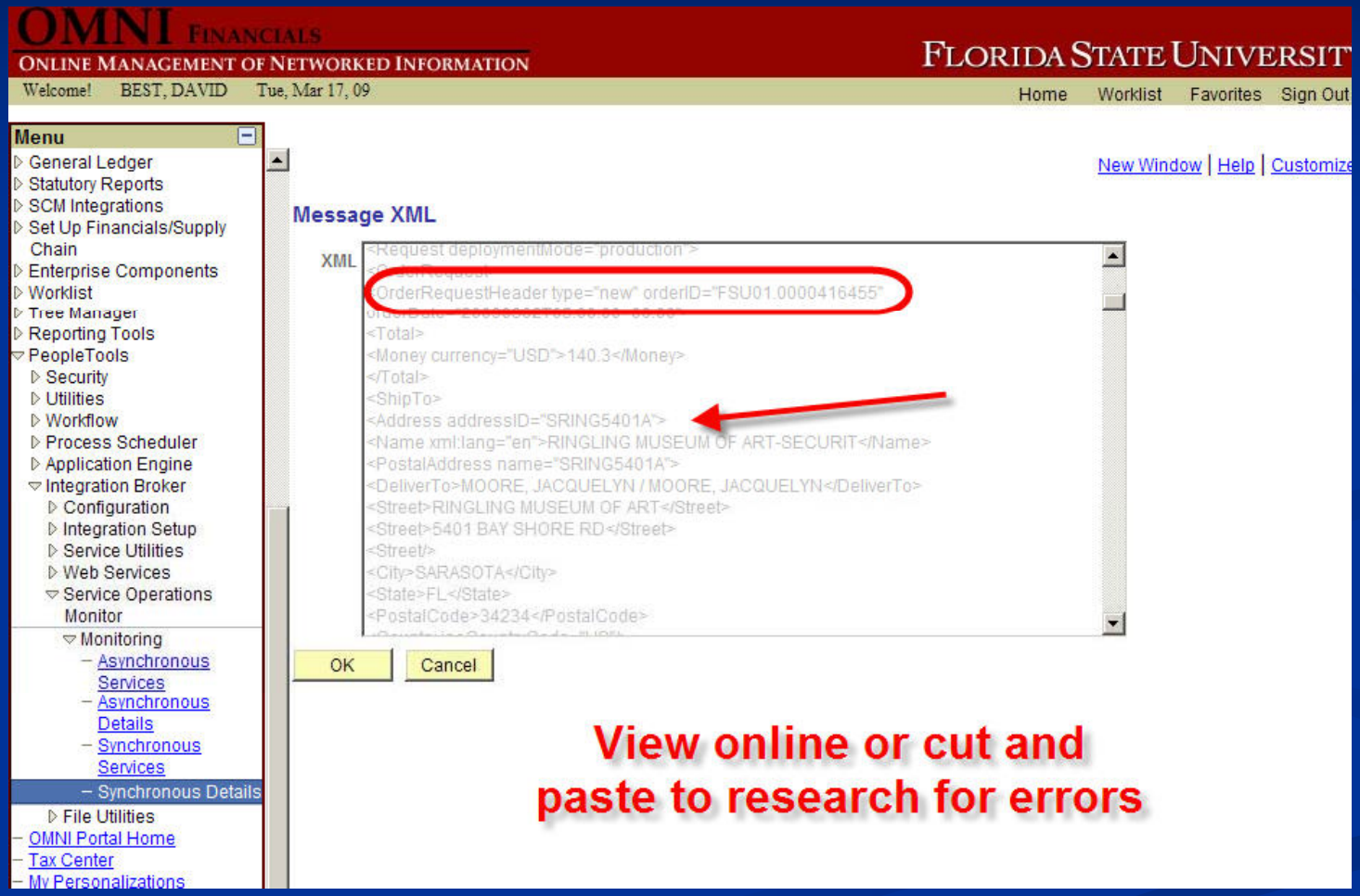
PO Dispatch Via EDX



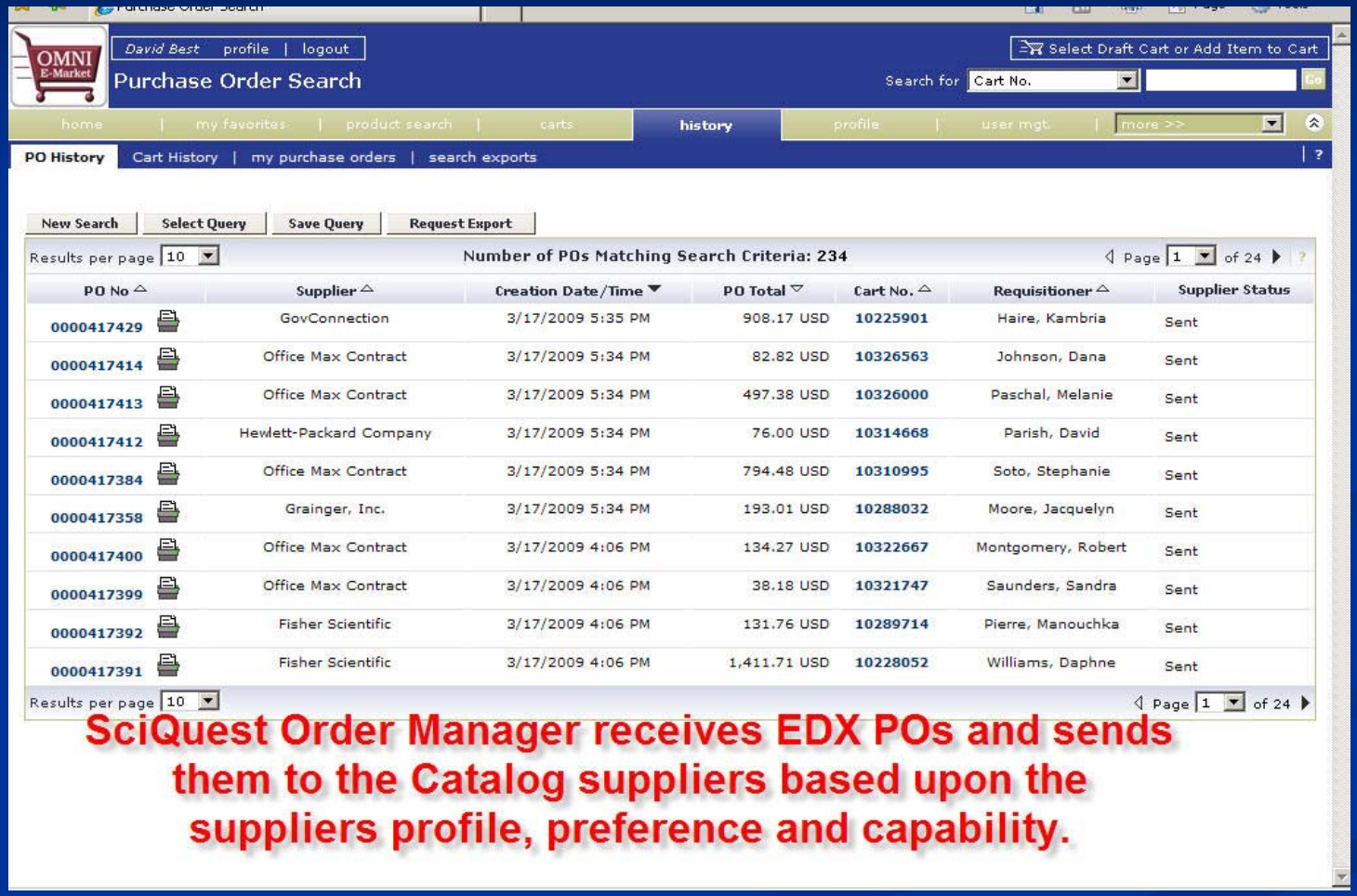
PO Dispatch Via EDX



PO Dispatch Via EDX

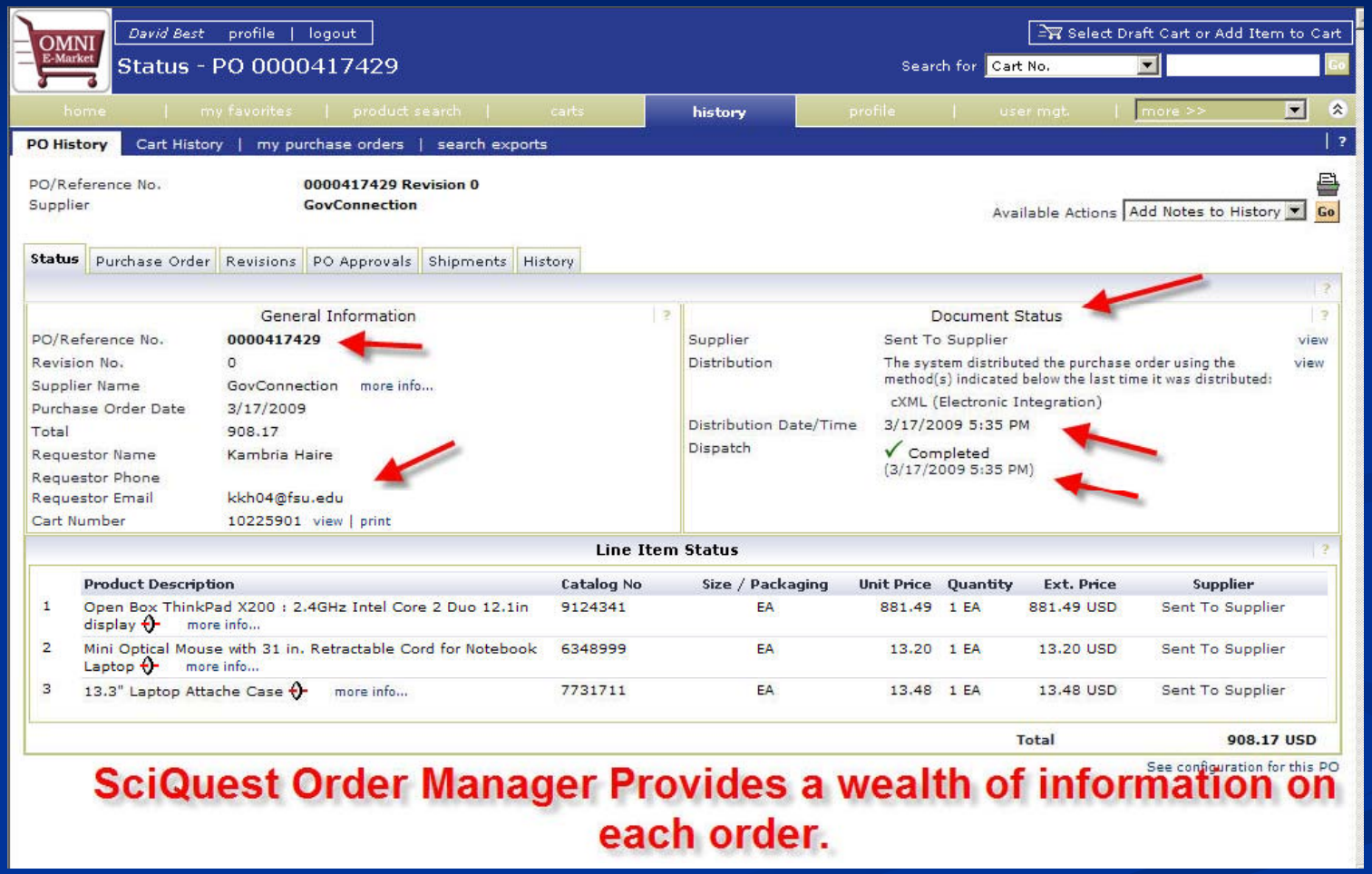


PO Dispatch Via EDX



SciQuest Order Manager receives EDX POs and sends them to the Catalog suppliers based upon the suppliers profile, preference and capability.

PO Dispatch Via EDX



SciQuest Order Manager Provides a wealth of information on each order.

PO Dispatch Via EDX

You forwarded this message on 3/13/2009 3:25 PM.
Extra line breaks in this message were removed.

From: support@sciquest.com
To: support@sciquest.com; Tekriwal, Amardeep V; Best, David; Tang, To-Ha'
Cc:
Subject: FSU PROD PO 0000417218 non-200 XML response
Sent: Fri 3/13/2009 2:34 PM

PO identified by PO_ID

webMethods has posted the FSU PO Import document to SelectSite, but received a 201 response. A 200 (Success) message has been returned to the calling program, however investigation is required to resolve the issue.

SCIQUEST SUPPORT: If a 201 response was returned, it is a data issue, and it is the responsibility of FSU to correct it. It would be advisable to contact them proactively and offer assistance if required, however. If some other error code was returned (such as a 500), we should investigate the cause of the error.

RESPONSE:

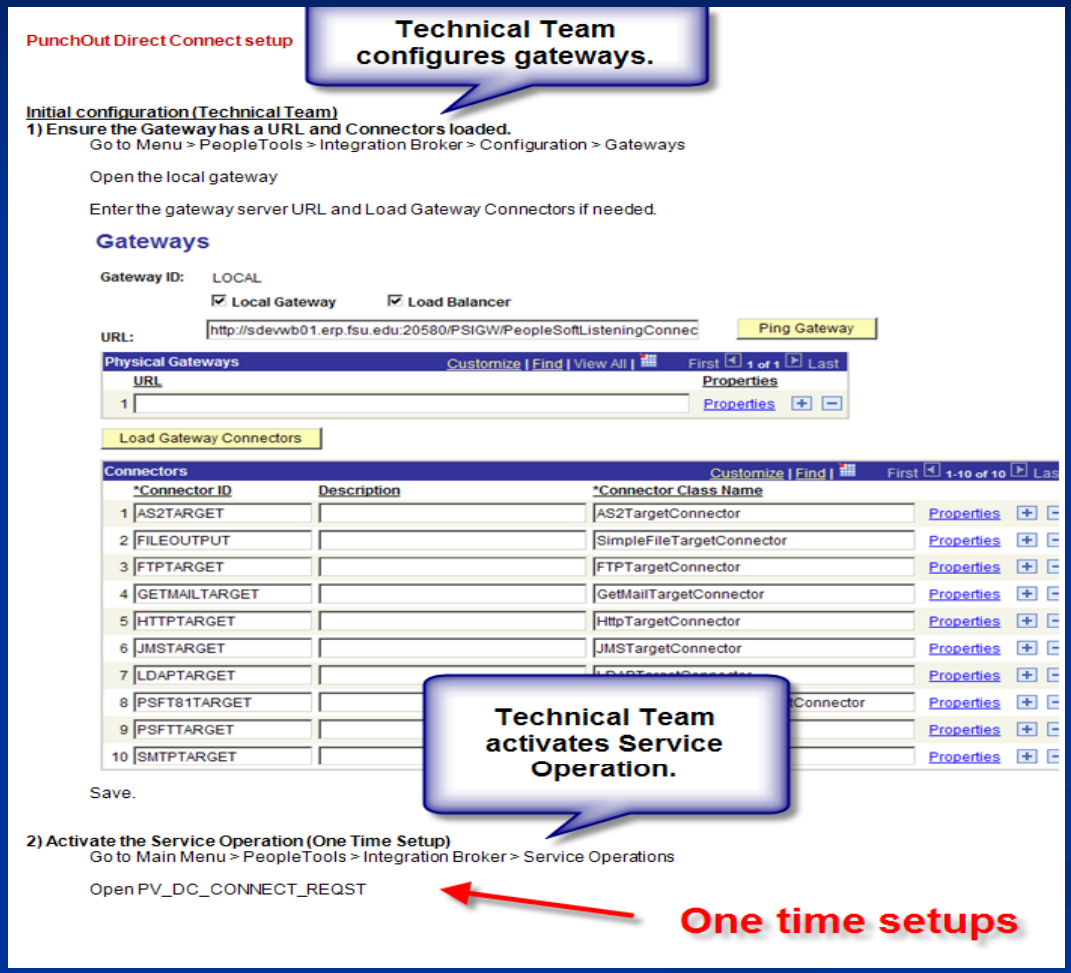
```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE PurchaseOrderMessage SYSTEM "http://solutions.sciquest.com/app_docs/dtd/po/PO.dtd">
<PurchaseOrderMessage version="2.0">
      <Header>
            <MessageId>
                  1236969247439
            </MessageId>
            <Timestamp>
                  2009-03-13T14:34:07.439-04:00
            </Timestamp>
      </Header>
      <ResponseMessage>
            <Status>
                  <StatusCode>
                        201
                  </StatusCode>
                  <StatusText>
                        XML parsing executed and completed successfully, but failed due to invalid data
```

Email alerts are sent immediately when an EDX dispatch encounters an error

Direct Connect Setup

- One Time by IT-Technical and IT-App Support
- One Time by Functional
- Linked Supplier Setup

Direct Connect Setup



Direct Connect Setup

FUNCTIONAL STEPS:

One time functional task

1) Create Direct Connect Type (One-Time)
Go to Main Menu > eProcurement > Administer Procurement > Maintain Supplier Integration > Direct Connect Methods

Access via ePro Administer Procurement

Direct Connect Methods

Direct Connect Method:	PUNCHOUT_SCIQS
Root Package ID:	FSU_PV_EXTERNAL_APP_SUPP
Application Class Path:	DirectConnectSciQuest
Description:	SciQuest EXTRINSIC method

Properties Customize | Find | View All | First 1-13 of 13 Last

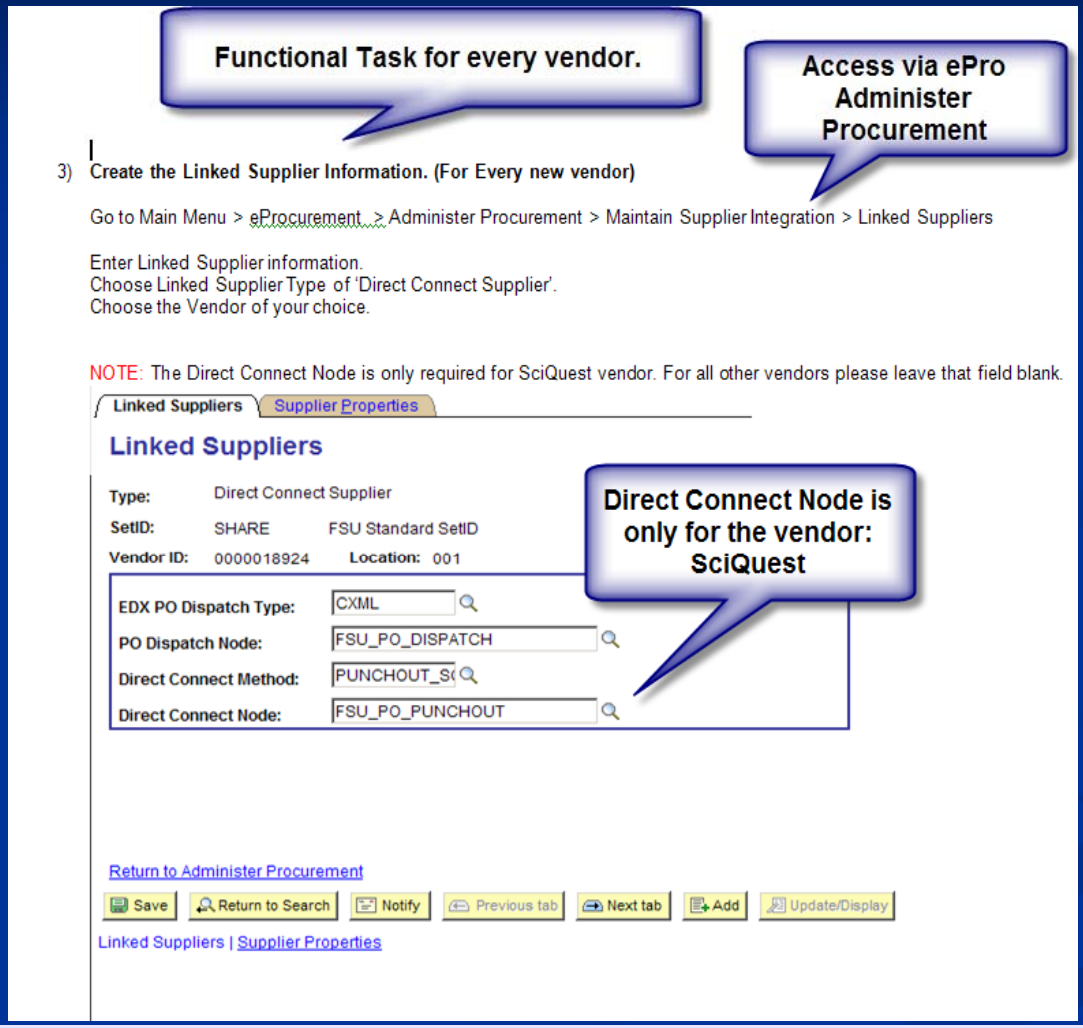
	Property Name	Description
1	ALLOW_EDIT	'Y' if vendor allows editing of items via PunchOut
2	ALLOW_SHIPPING_EDIT	'Y' if vendor allow shipping info. while editing
3	ALLOW_VIEW	'Y' if vendor allows viewing of item descriptions
4	CATEGORY_ID	Default Category ID for this vendor
5	FROM_DOMAIN	Header.From.Credential.domain
6	FROM_IDENTITY	Header.From.Credential.Identity
7	KEYWORDS	Search keywords
8	LOAD_PORTAL	Load Portal upon return from vendor's site ('Y' / 'I
9	SENDER_DOMAIN	Header.Sender.Credential.domain
10	SENDER_IDENTITY	Header.Sender.Credential.Identity
11	SHARED_SECRET	Header.Sender.Credential.SharedSecret
12	TO_DOMAIN	Header.To.Credential.domain
13	TO_IDENTITY	Header.To.Credential.Identity

Return to Administer Procurement

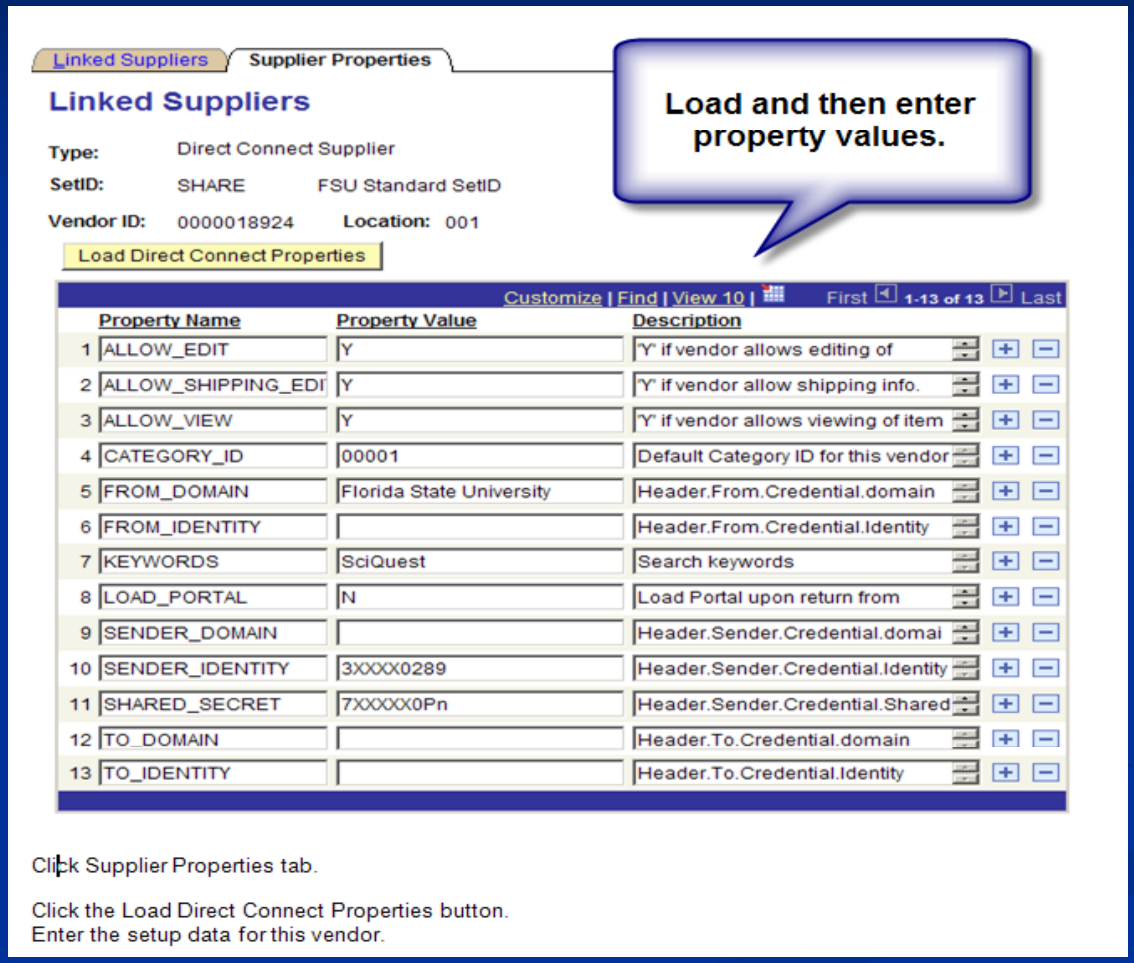
Save | Return to Search | Notify | Add | Update/Display

2) Create EDX Dispatch Type (One-Time)
Go to Main Menu > eProcurement > Administer Procurement > Maintain Supplier Integration > EDX PO dispatch Types

Direct Connect Setup



Direct Connect Setup



Click Supplier Properties tab.

Click the Load Direct Connect Properties button.
Enter the setup data for this vendor.

New Roles for OMNI Users

- Window Shopper (view only)
- Shopper
  - *Shop*
  - *Assign Carts*
    - Three Digit Departments
- Requester
  - *Shop*
  - *Assign Carts*
  - *Return Carts to OMNI Requisition*

Other Issue Areas of the Project

- Name, Logo, Colors
- Category Codes
- UOM
- PO Acknowledgements
- Ship To Addresses

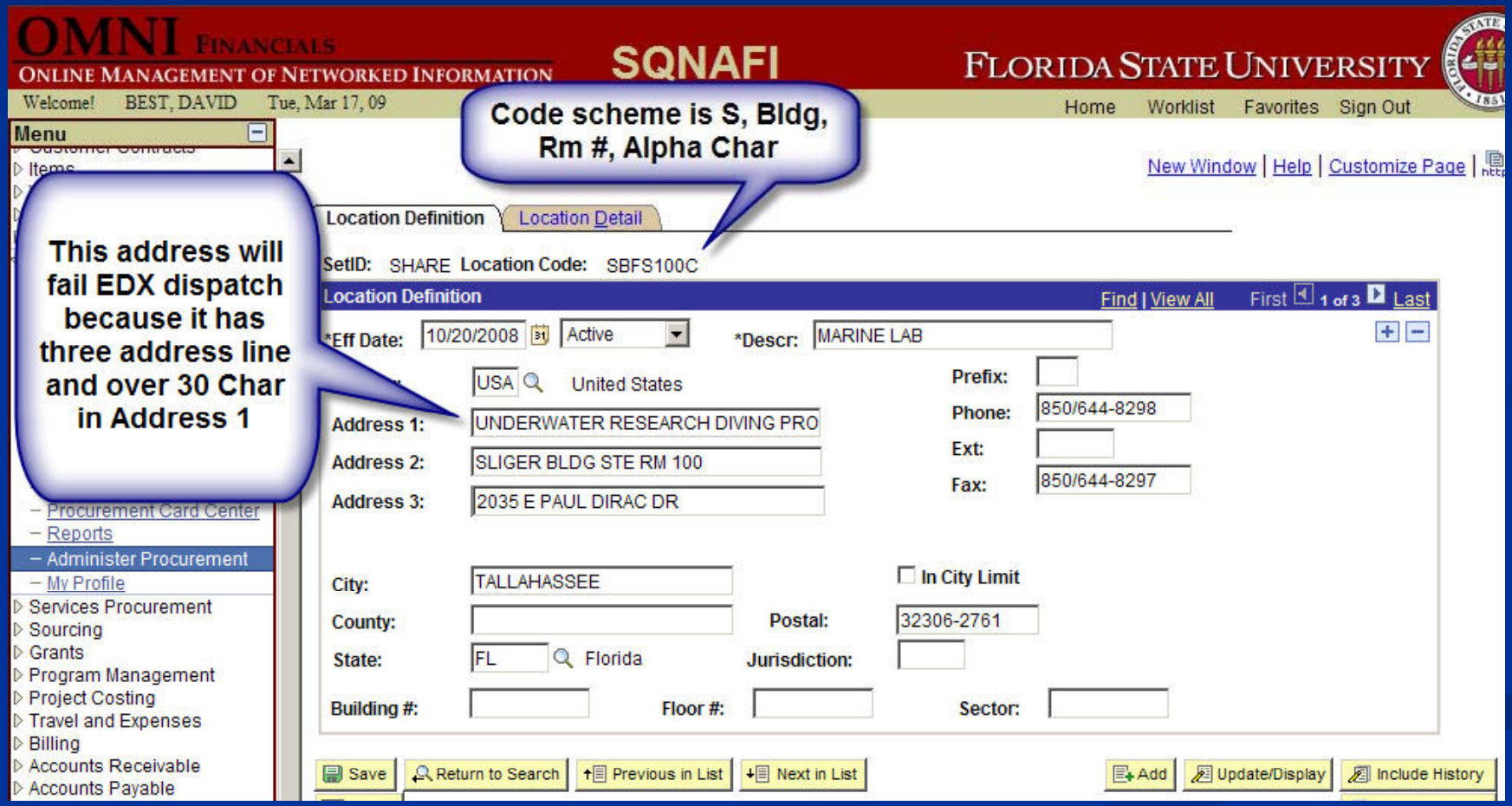
Ship To Addresses

L142 — Qiagen can append the PO number to the attn: line.

	A	J	K	L	M
1	**Supplier Enablement Functional Spec.**	*** Office Max 0000020581 (1DT_2ST)**	**Perkin Elmer (0000005117)**	***Qiagen (0000003352) 2DT_1ST**	***Sigma (2DT_1ST)**
133	a. What is the character limit for BillTo code?	6			
134	Does the vendor ship to the address on the PO or do they use an internal shipping code from their own system?	Internal Code, uses Shipto Code	Goods will be shipped to the internal shipping code and address configured. ShipTo code from cXML is used to map to internal maintained code and shipment is done to address configured for that code at PerkinElmer.	Address on cXML PO.	Need list of Address Codes; reads address off of the PO and compares to Code
135	a. What is the character limit for ShipTo code?	6			
136	DeliverTo lines	1, 26 character max	1, 40 Attention to: Can put into 2 deliver to lines		2, 35
137	a. What is the maximum number of <DeliverTo> lines that the vendor can support?			One line 40 characters	
138	b. What is the maximum character limit for each of these lines?				
139	Street lines	2, 26 character max per line; system truncates after 26 characters	2 - does not read from PO.		1, 35
140	a. What is the maximum number of <Street> lines that the vendor can support?			One Line. 60 characters	
141	b. What is the maximum character limit for each of these lines?				

Reduce Ship To Addresses to lowest common denominator!

Ship To Addresses



Ship To Addresses

- Changed over 800 Delivery Locations to conform with lowest common denominator among supplier Ship To requirements:
  - *Limit of two address lines*
  - *Limit of thirty characters per address line*
  - *Manual task that required research*
  - *Implemented address line conventions*

Ship To Addresses

- Late customization to add Attention field value from requisition header defaults to the POPO005 and FSUPOPO5 SQR processes.
  - *Header and body of PO*
  - *PO line spacing tight when used with line comments*
  - *Random Names on Core PO requisitions*

Go Live and Rollout

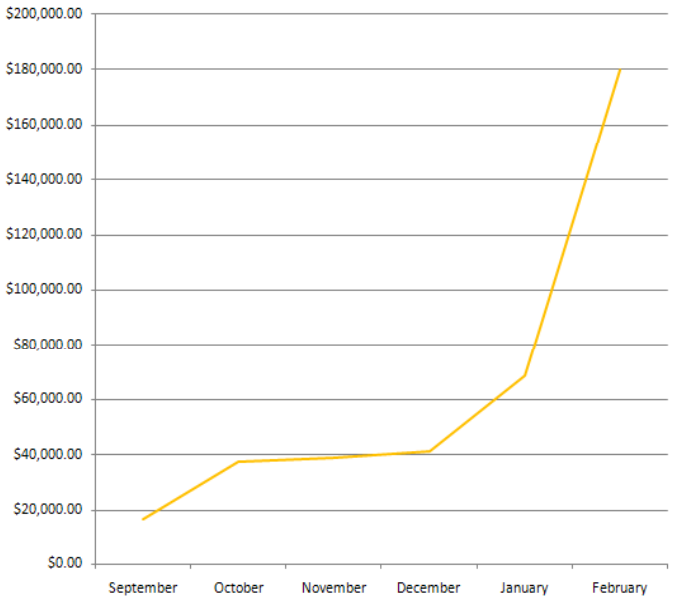
- SciQuest Environments
  - *User Integration Testing (UIT)*
  - *Production Environment*
- Live Order Cleanout and Crossover
- Pilot Rollout to Selected Departments
  - *Temporary Role, Security and Permissions*
  - *Live Order Testing with Suppliers*
- University-Wide Rollout

Three Month Review

- Lessons Learned
  - *Become tighter and more consistent in contract negotiations*
  - *Need a greater portfolio of suppliers*
  - *Need to reduce Blanket POs*
- Usage
  - *600 Requester enabled*
  - *Volume of orders and total spend rising sharply*

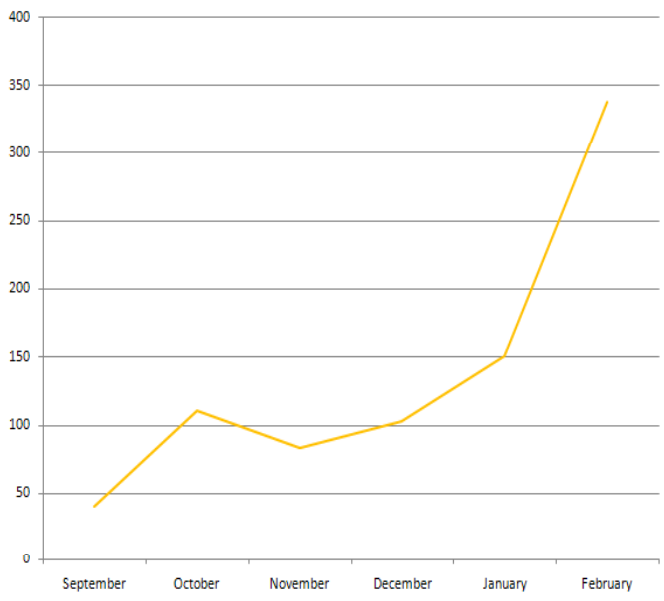
Three Month Review

Total Spent By Month



Total Spent By Month	
Month	**Amount**
September	$16,401.06
October	$37,097.37
November	$38,687.85
December	$40,837.84
January	$68,456.62
February	$179,631.54
Total Spend:	**$381,112.28**

Total PO Count By Month



Total PO Count By Month	
Month	**Count**
September	40
October	110
November	83
December	103
January	150
February	338
Total PO Count	**824**

Three Month Review

- Best Features
  - *Shopper like ease of finding items and saving carts*
  - *Requesters like not having to keystroke enter line items*
- Worst Features
  - *Approvers must approve more requisitions*
  - *Ship To address changes*
  - *Buyers save time in sourcing*

Three Month Review

- ROI
  - *Provost wants to see cost per transaction over time to evaluate success*
  - *Need to work on spend matrixes for accurate evaluation*
    - % of addressable spend in eMarket vs. Peoplesoft
    - Number of suppliers enabled
    - Time spent from req to check
    - Elimination of errors in orders

Questions?

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