Housekeeping

- Please set cell phones and pagers to silent
- Handouts
- Note cards for questions
- Sign-in sheets
Welcome and Introductions

Presenters:

• Anne Sullivan, Executive Vice President for Finance

• Joe Harney, VP Procurement Services / FIN ERP Procurement Sponsor

• Terry Park, Director of Procurement Systems / FIN ERP Procurement Functional Lead

• Kate Sheeran, Change Management Lead
Welcome and Introductions

Core Team Members:

- Karen Burke, CUMC Dept Surgery
- Kim Chadourne, Budget Office
- Kevin Cook, SPF
- Alice Gleason, Controller’s Office
- John Hogan, Facilities
- Mike Kerstan, Controller’s Office
- Brendan Mallee, EVPF
- Terry Park, Purchasing
- Ting Shi, CUMC Controller’s Office

Extended Team Members and Subject Matter Experts:

- Harry Aristakesian, Internal Audit
- Rebecca Balentine, SPA
- Fran Caracappa, CUMC Controller
- Paul Cassidy, Engineering
- Marlene D’Agostino, Anesthesia
- Brian David, Medicine
- Jo-Ann Espaillat, Irving Institute
- Joel Fine, Libraries
- Jody Grunfeld, MSPH
- Karen Hoffer, Lamont
- Hugh Horowitz, Procurement
- Andy Hrycyk, General Studies
- Sean Johnson, Procurement
- Joe Labetti, Procurement
- Joann Li, Pathology
- Wil McKoy, CUMC Budget Office
- Donna Messina, Astronomy
- Ed Moroni, Law School
- Scott Norum, A&S
- Dorothy Pearlman, Internal Audit
- Michael Reich, Procurement
- Patricia Reid, Treasury
- Narda Romero, P&S Central
- Audrey Rosenblatt, Arts & Sciences
- Dionida Ryce, Basic Sciences
- Joshua Sakolsky, Art History and Archaeology
- Eileen Valerio, Internal Audit
- Mary Ann Wanner, Dental School
- Anna Wojnarowska, Business School
System Go-Live - July 1, 2012

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≥ FIN ERP is our Project

≥ ARC is the name of our new financial system
Financials ERP Scope

Project Scope

- Redesign our Chart of Accounts in PeopleSoft Financials
- Implement a new General Ledger (core accounting module)
- Implement new Accounts Payable and Purchasing modules
- Implement Project Costing module; allows us to track certain activity across fiscal years
- Retrofit current Budget Tool for a new Chart of Accounts
- Design New Reporting—queries “in the system” and from the data warehouse
- Conduct Training
What is a Transition Session?

• Transition Sessions are intended to promote awareness and orientation to the changes that FIN ERP will bring and prepare you for the formal training and deployment of the new solution.

• Formal ARC System Training will begin in April 2012.

• Objectives for Today:
  – Introduce the new ARC Procurement solution
  – Understand what is changing and what is not changing
  – Provide functional overview of each Procurement transaction type
  – Review key Procurement interfaces
Key System Components of the FIN ERP Solution

- Application Security
- Chart of Accounts

**Finance**
- General Ledger
- Budget
- Project Costing

**Procurement**
- Purchasing
- Accounts Payable
- P-Card

**Reporting**
- PeopleSoft
- Financial Data Store

**Integrating Systems (i.e. Advance, PAC/LA, SIS, etc.)**

**Enabling Technology and Infrastructure**

**Operations and Maintenance**
Procurement Solution
ARC Procurement Solution
Procurement Lifecycle

- Project Team looked for opportunities to increase functionality, improve internal controls, and enhance information using ARC.
Procurement: Summary of Changes

• Increased Functionality
  • Additional automatic functions
  • Added efficiencies
  • More robust functionality
  • Some new complexity

• Improved Internal Controls
  • Systematic controls
  • New functionality providing additional controls
  • Opportunity to leverage system for improved controls

• Enhanced Information
  • Greater visibility into transactions
  • Direct access to more data
  • Integrated information on transaction life cycle
Procurement: Summary of Changes

- FINNSYS (VM)
- FFE
- CAPS
- FINNSYS (CO)
- WORKS
- APCAR

ARC
The New “Rules of the Road”
New System-Based Activities:
Budget Checking, Receiving, Matching

**Budget Checking:** Enables you to control commitments and expenditures automatically by checking them against predefined, authorized budgets.

**Pre-Encumbrance:** Part of budget checking, amount expected to spend, but for which there is no legal obligation to spend. Cleared when encumbrance is created.

**Receiving:** A system record of goods received from purchase orders.

**Matching:** Matching process compares vouchers with purchase orders (2-way) and receiving (3-way) documents. This ensures that you pay for only the goods and services that you order and receive.
Segregation of Duties: Requisitions

- We can leverage ARC functionality to require segregation of duties on all requisitions above a dollar threshold; $500 was selected.
- Requisitions will still be required for all services, regardless of dollar level (as they are today).
- Department approvals must be within an individual’s threshold limits.

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<th>Services</th>
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<td>&lt; $500</td>
<td>- Requisition not required</td>
<td>- Requisition required</td>
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<td></td>
<td>- Segregation of duties not required</td>
<td>- Must have different Requisition Initiator vs. Requisition Approver</td>
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<tr>
<td>&gt; $500</td>
<td>- Requisition is Required</td>
<td>- Requisition Required</td>
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<td></td>
<td>- Must have different Requisition Initiator vs. Requisition Approver</td>
<td>- Must have different Requisition Initiator vs. Requisition Approver</td>
</tr>
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</table>
Segregation of Duties: Vouchers

- Vouchers under $500 or associated with a PO need just one level of departmental approval
- **New:** non-PO Vouchers over $500 will require a separate initiator and approver
- Vouchers for TBERS, Cash Advances, Petty Cash Replenishments will continue to require a separate initiator and approver at all dollar thresholds
- Department approvals must be within an individual’s threshold limits

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<th>Non-PO Vouchers</th>
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<td>&lt; $500</td>
<td>• Voucher Initiator can be same as Voucher Approver</td>
<td>• Voucher Initiator can be same as Voucher Approver</td>
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<td>&gt; $500</td>
<td>• Voucher Initiator can be same as Voucher Approver</td>
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Changes for Each Procurement Transaction Type
Vendor Request

Consolidated Web Form

Vendor

Department

Vendor Record

Vendor Document

Vendor Management Review and Approval

- Streamlined vendor request
- Direct access for vendors to submit information to VM
- Online W9/W8
- Consolidated workflow, status visibility through email
- One vendor profile with multiple addresses

Controls

- All Vendor information must be entered centrally into ARC prior to transaction initiation

Information

- Ability to inquire on vendor information (i.e. address, contact) and vendor payment details
Vendor Request Form Mockup

Procurement Vendor Request Form

- **New Request**
- **Modify Request**

**Request ID:** Auto Generated Number

- **Vendor Name:**
- **PSFT Vend ID:**
- **Vendor Email:**
- **Vendor Contact:**
- **Vendor Phone:**

**Nature of Transaction**

- **Purchase of Goods or Services**
- **Employee Reimbursement**
- **Petty Cash**
- **Honoraria**
- **Prizes & Awards**
- **Refunds**
- **Human Subject Study**
- **Royalties**
- **Charitable Contributions**
- **Scholarship or Fellowship**
- **Sponsor**
- **Libraries Vendor**

I have read and agree to the Conflict of Interest statement:  
- **Yes**
- **No**

[Submit]  [Reset]

* Mockup fields and functionality subject to change
Vendor Look Up

- Search for Vendor by Vendor ID or Vendor Name

Look Up Vendor ID

Set ID: 
Vendor ID: 
Short Vendor Name: 

Search Results
Only the first 300 results of a possible 320 can be displayed.

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Short Vendor Name</th>
<th>Name 1</th>
<th>Name 2</th>
<th>Our Customer Number</th>
<th>Old Vendor ID</th>
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<td>Marks Diner</td>
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<td>1FEDRLANDR</td>
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</table>
Requisitions – ePro Module

Functionality
- No limits on # of line items
- Distribution at Line Item Level & More than 5 distributions
- Requester defaults, templates
- UWPA requisitions no require Purchasing review, at any $ level
- EDM integration, email notification

Controls
- Budget Checking (Manually and Automatically)
- Segregation of Duties
- Workflow Rules Direct Routing
  - Commodity Code Based
  - Dept Chartfield Based

Information
- New Commodity, Service codes
- Ability to inquire on requisition details, processing status
Requisitions – ePro Module

- Enter Requestor ID for Defaults
- Line Items Detail include Distribution Lines
Purchase Orders – Purchasing Module

Functionality
- Requisitions systematically generate Purchase Orders
- All Purchase Orders will systematically be dispatched

Controls
- Budget Checking

Information
- Ability to inquire on PO processing status and transaction activity summary (i.e. PO amount received, matched, and/or invoiced)
**Purchase Orders – PO Mockup**

![Image](image.png)

---

**Purchase Order**

<table>
<thead>
<tr>
<th>Payment Terms</th>
<th>Freight Terms</th>
<th>Ship Via</th>
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<tr>
<td>Net 30</td>
<td>Destination</td>
<td>Common</td>
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<tr>
<th>Buyer</th>
<th>Phone</th>
<th>Currency</th>
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<tr>
<td>Kenneth Schumacher</td>
<td>555-555-5555</td>
<td>USD</td>
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### Ship To:

144 North Street  
ADDRESS2  
ADDRESS3  
New York NY 10168  
United States

### Bill To:

144 North Street  
ADDRESS2  
ADDRESS3  
New York NY 10168  
United States

---

**Tax Exempt?** N  
**Tax Exempt ID:**  
**Line-Sch** Item/Description  
**Mfg ID**  
**Quantity** UOM  
**PO Price**  
**Extended Amt**  
**Due Date**

<table>
<thead>
<tr>
<th>1</th>
<th>Test Item for Hand on Demo</th>
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<tr>
<td>100.00 EA</td>
<td>100.00</td>
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</table>

**Schedule Total** 10,000.00

**Item Total** 10,000.00

**Total PO Amount** 10,000.00

---

**Authorized Signature**

---

*Mockup field subject to change*
Change Orders – Purchasing Module

Functionality
- Changes made directly to PO
- Change Orders that no longer require Central Approval:
  - POs to UWPAs
  - Decreases in PO Amount

Controls
- Budget Checking
- Segregation of Duties
- Workflow mirrors Requisition Workflow

Information
- Ability to inquire on change order details and history
Change Orders – Purchasing Module

- Changes made to Purchase Order directly
- Can change Line Information: including Quantity, Price and Distribution
Receiving – Purchasing Module

Functionality
- Receiving for:
  - Equipment
  - Hazardous Materials
  - Controlled Substances
- Ability to fully receive, partially receive, reject delivered goods

Controls
- Must have Requestor and/or Requisitioner role
- Items that require Receiving must be received in ARC prior to Voucher completion

Information
- Ability to inquire on PO receipt information and associated transactions (e.g., associated Vouchers and payments)
**Receiving – Purchasing Module**

- Receive items at the PO Line Item by Quantity

![Image of Receiving Module]

**Receive PO Quantity**
**Procurement Card – Purchasing Module**

**System Loads P-Card File**
- Transaction reconciliations, and approvals in ARC
- ARC generated vouchers then post to the General Ledger

**Reconcile Transactions**
- Allocations by cardholder/approvers are restricted by Dept & Account

**Approve Transactions**
- Ability to inquire for P-Card transactions
- Ability to drill back from General Ledger to P-Card transaction from Voucher

**System Generates Vouchers**
Procurement Card – Purchasing Module

- Reconcile and Approve P-Card transactions by Employee

![Image of Procurement Card Reconciliation interface]

<table>
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<tr>
<th>Transaction</th>
<th>Card Issuer</th>
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<th>Merchant</th>
<th>Status</th>
<th>Transaction Amount</th>
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<tr>
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<td>07/22/2000</td>
<td>ABC Office Supply</td>
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<td>740.00 USD</td>
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<td>350.00 USD</td>
<td>USD</td>
<td>Valid</td>
</tr>
</tbody>
</table>

**Define ChartField Information**

**Reconcile and Approve Statuses**
Voucher – Accounts Payables Module

Functionality
- For matched vouchers - No Central AP review
- Ability to adjust/correct vouchers for accounting purposes
- EDM integration for document viewing, email notification for Holds
- Posting after Approvals and budget checking

Controls
- Budget Checking
- PO Matching (2-way and 3-way)
- Segregation of Duties

Information
- Ability to inquire on voucher information based on numerous criteria
- Ability to inquire on payment information by payment date, payment method, or voucher
Voucher – Accounts Payable Module

- Copy PO or Receipt for Matching
- Enter Header, Line & Distribution Information
Integrating Systems

**Functionality**
- Staples/PSS User Default Chartfields and Single Sign On
- ARC generated vouchers for Integrated transactions
- Change in Fisher Scientific Process

**Controls**
- Segregation of Duties
- Streamlined Workflow

**Information**
- Inquire on integrated transaction through Vouchers
Online Inquiry

- Integrated System provides robust Online Inquiries:
  - Ability to inquire on single/multiple transactions
  - Real-time Inquires
  - Approval Transactions Inquiries
  - Download/Export Inquires to Excel
Online Inquiry Pages

- Transaction Visibility from Requisition through to Payment
To Summarize

• Integrated Solution
  • Disparate Components Consolidated into one System
  • Functionality not in the System is integrated into it

• Procurement Lifecycle Does Not Change
  • Processes from “Req to Check” Remain
  • Some Steps, Tools & Rules are More Systematic, Consistent

• Integration Has 3 Primary Characteristics
  • Increased Functionality
  • Improved Internal Controls
  • Enhanced Information
Facilitated Q&A
Meeting Wrap-Up
# ARC Training Timeline

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<th>2013</th>
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<td><strong>CORE ARC TRAINING</strong></td>
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<td><strong>Transition Session #1</strong></td>
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<td><strong>Transition Session #6</strong></td>
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## Core ARC Training

- **Wave 1:** Deliver WBT (Introductory Level)
- **Wave 2:** Deliver WBT & ILT (Detail level)
- **Follow-Up Training**
Project Resources

- Review FIN ERP Project Website: http://www.finance.columbia.edu/fin_erp/index.html

- Send Questions to FIN ERP Project Email Address: FINERP@columbia.edu

- School / Admin Unit Liaisons (see following slide for detailed list)
Your Extended Support Network:
FIN ERP School/Admin Unit Liaisons

Alumni and Development – Hannia Smith
American Assembly - Karla Garcia
Architecture - Elizabeth Alicea
Arts and Sciences - Ellen Binder
Athletics - James Grate
Business School - Janet Horan
Columbia College - Andrea Burrell
Continuing Education - Karyn Smith
Columbia Technology Ventures - Tony Cerone
CUMC - Raquel Marin-Oquendo
Earth Institute - Wayne Belcher
Facilities - Barbara Tracy
Finance - Lisa Rogerson
General Counsel - Helene Newman
General Studies - Robert Hoffmeister
GSAS - Rebecca Hirade
Journalism School - Lucia Viterbo

Kraft Center for Jewish Life - James Levin
Lamont Doherty Earth Observatory - Edith Miller
Law School - Gabriele Werffeli
Libraries - Kristine Kavanaugh
President’s Office - Kate Townsend
Provost’s Office - Michelle Baggan-Bacchus
Public Affairs/Government and Community Affairs - Allen Poole
Research - Debbie Stiles
School of Engineering and Applied Science - Anna O’Neill
School of International and Public Affairs - Patrick Bohan
School of the Arts - Barbara Batcheler
Social Work - Cynthia Kong
Student Administrative Services - Marcela Ruano