

BIG News for a New Year

Happy New Year from Project SourcePoint!

We are kicking off the year with a big announcement that we have officially postponed our SourcePoint (SAP Ariba) Go-Live date to **April 12th, 2021**. This decision was made due to several factors, including:

- Scheduling conflicts with the beginning of the Spring term
- Time to map To-Be Business Processes in collaboration with Universities for improved implementation

This extension will allow more time for training development and delivery, additional integration testing opportunities, and additional time to prepare for the future of SourcePoint.

We will provide additional information in future communications regarding cutoff dates for procurement functionality in SAP and the retirement of ProcureWare.

Thank you for your support and we look forward to a successful Go-Live in April!

A Message from SourcePoint Leadership



Jenny Doherty,
SourcePoint
Executive Sponsor

Happy New Year!

2021 is the year that we will launch a new, best-in-class e-procurement tool, which will go live in just a few months. We call it SourcePoint, and it's powered by SAP Ariba. Think of it as a major upgrade to the SAP system that we use today – like getting a new car with the latest bells and whistles. Instead of back-up cameras and all-wheel drive, we're getting cloud-based access from any device (PC, mobile phone), direct access to supplier catalogs (Staples, Grainger, etc.), and an automated procure to pay process among other things.

Please take a few minutes to read this newsletter to learn more and sign up for some upcoming short demos so you can get a preview of the tool prior to the training sessions in March.

Training Information & Updates

With a new Go-Live date of **April 12th, 2021**, we have shifted our training dates to March. This change means we have more time to get SourcePoint ready for use and have a longer ramp for training activities.

The team has been hard at work building training materials including virtual classroom sessions, demo videos, quick reference guides, and hands-on simulations. We have built a flexible, customizable plan that we are really excited about and hope that you will be too!

When will I receive training for SourcePoint?

Select training materials will be available beginning early next month, with more being added as we get closer to Go-Live. We are using a blended approach (mix of real-time virtual training and resources) with a focus on getting the training you need, just in time, for the role you perform.

Where can I sign up for live training?

Information on which courses you should take for your role will be included in the February newsletter. Registration links will be sent via personalized invitations (based on your role) beginning February 15th.

I have a specific learning preference. What about me?

Not to worry! We have something for everyone!! You learn by doing? Great! We will have hands-on simulations included in every session. You like to look at the materials beforehand? Super! We will have everything loaded on the SourcePoint Training Portal for your convenience (you can even print and take notes)! If you have any questions or need any special accommodations, please reach out to the **SourcePoint Change Management Lead, Carley Kramer** at cakramer@passhe.edu.

Is training required?

Training will be required for high-volume SourcePoint users especially those in Procurement, Accounts Payable, and Receiving. We highly recommend that all SourcePoint users review training resources available for your role.

The SourcePoint Training Team is looking forward to seeing you (virtually) in March! For now, check out the Open House Demo section below to register for our upcoming sessions.

Approvals in SourcePoint

With a new system, we will also be updating our purchase requisition approval processes. We are moving from a highly complex approval matrix with many exceptions to a simplified standard structure. Different types of approvals have been considered (Fund Center, Asset Approver, IT Approver, etc.).

Problem

Over 4,000 Requisition Rules across Universities

- Complex approval conditions
- Not digestible for analysis
- Not programmable in SourcePoint

Solution

Standard Requisition Approval Rules

- Based on best practice provided by SAP Ariba
- Consensus from VP Workgroup
- Flexible to needs of each University

For fund center approvals, we will use a simplified five level approach:

Approval Level	Threshold	Example A: 5 Approvers	Example B: 3 Approvers	Example C: 3 Approvers
L1	\$0 - \$1000	Cost Center Manager	Cost Center Manager	
L2	\$1000 - \$5000	Chair	Director	Cost Center Manager
L3	\$5000 - \$25,000	Dean		
L4	\$25,000 - \$250,000	Provost	VP Admin and Finance	Director
L5	\$250,000 and up	VP Admin and Finance		VP Admin and Finance

Each university is configuring their fund center approval workflows using these level options to meet their needs.

Additional conditional approvals will be automatically included and routed within SourcePoint (IT, Assets, etc.). You will also have the option to manually add approvers to the workflow, as needed. More information to come during future demos and training!

Business Advocate Network Spotlight

We are so thankful for the work all our Business Advocates are doing to make SourcePoint a success! We're excited to announce our new **SourcePoint Business Owners** who will identify any change impacts between the existing and new business processes to help the universities with the transition to the new tool. They will also be the primary points of contact for the universities post Go-Live.



Your local Business Advocates have been hard at work completing testing, preparing for training activities, and leading mini demos across campuses!

Our Testing Team is thrilled to announce that we achieved a **94% pass rate** with over **200 scripts** tested. Congrats to everyone involved!

Huge shout out to the following teams for hosting informal Q&A sessions for their universities: **IUP, WCU, Cal U, Clarion, Mansfield, Lock Haven, Edinboro, and Kutztown**. There are more sessions being scheduled, so be on the lookout for future invitations from your local Business Advocates!

For a list of Business Advocates and to get in touch with your representatives, please click [here](#).

Open House SourcePoint Demos

Thank you to the 900+ participants who joined our SourcePoint demos last year! It has been exciting showing off the months of hard work that have gone into building SourcePoint for PASSHE. In this new year, we will continue hosting periodic 30-minute open demonstrations with the SourcePoint experts, giving you an opportunity to see the system in action and ask questions.

To register for upcoming sessions, please use the below links:

The **Guided Buying** demo will provide a look at the basic procurement process featuring a modern home page and simple search field for a user-friendly experience to purchase goods and services.

[Guided Buying \(Session A\), January 13th, 2021, 1pm Eastern](#)
[Guided Buying \(Session B\), January 14th, 2021, 1pm Eastern](#)

The **Supplier Request** demo will walk you through the process of adding a new vendor to SourcePoint.

[Supplier Request \(Session A\), January 20th, 2021, 1pm Eastern](#)
[Supplier Request \(Session B\), January 21st, 2021, 1pm Eastern](#)

The **Approvals** demo will show you how easy it is to review and approve requests in SourcePoint.

[Approvals \(Session A\), January 26th, 2021, 1pm Eastern](#)
[Approvals \(Session B\), January 27th, 2021, 1pm Eastern](#)

Please only sign up for sessions you will be able to attend as registration is limited. We will record the demos for those unable to attend and post on the [SourcePoint Portal](#).

SourcePoint Survey



We want to hear from you! Please complete our [SourcePoint Survey](#) to help us better understand the perspectives of our colleagues across PASSHE. Your feedback will help us better customize the technology to fit our needs, plan for training, and provide an enhanced SourcePoint user experience.

If you have questions, comments, concerns or want to get involved, please contact the **SourcePoint Change Management Lead, Carley Kramer** at cakramer@passhe.edu.

Your SourcePoint Leadership Team



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