UPDATES:

PAYMENTWORKS / VENDOR DATA REVAMP &

MYUK AMAZON BUSINESS

PROCUREMENT SERVICES
JANUARY 2024

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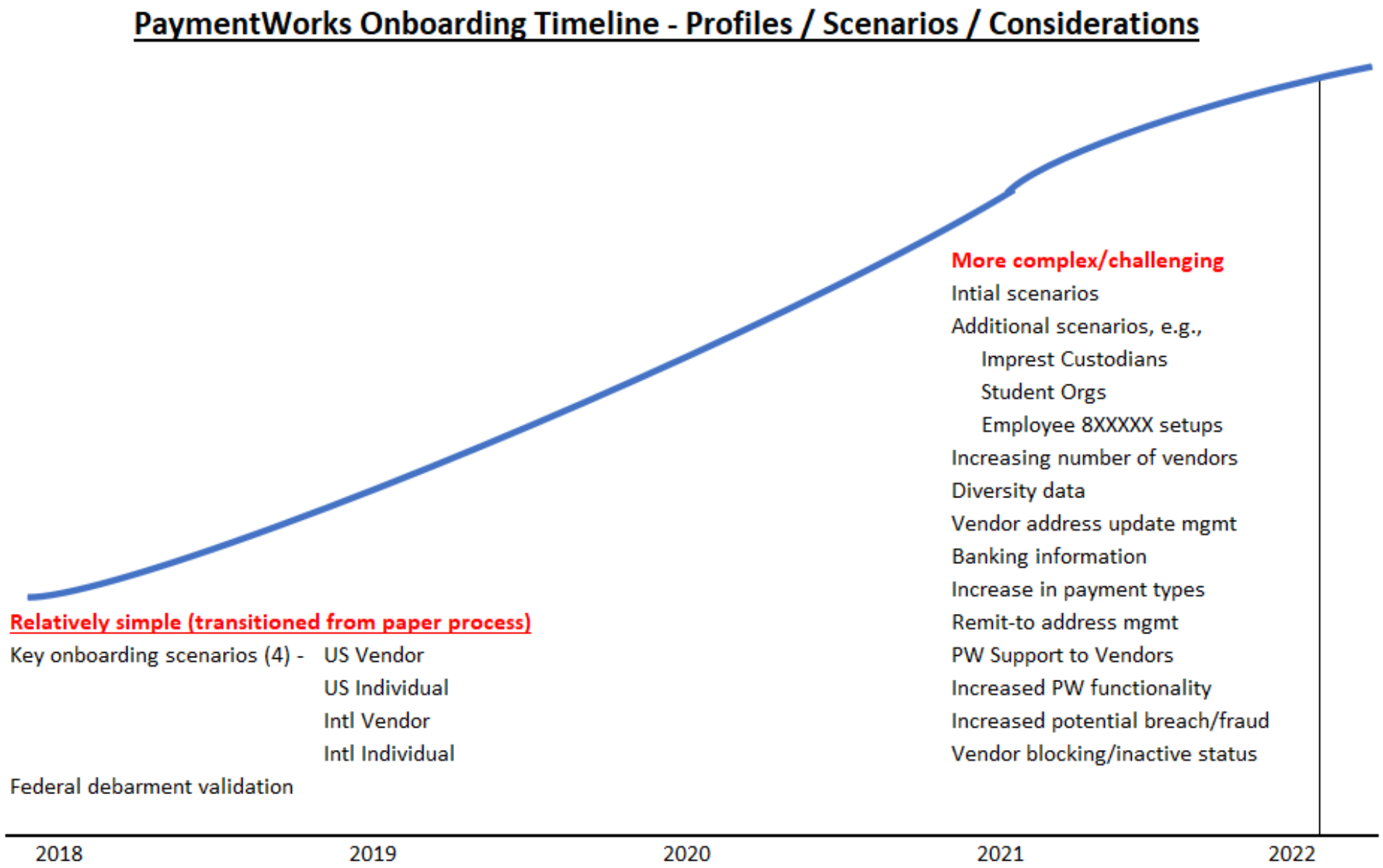
RECAP - PAYMENTWORKS 2018 THROUGH FALL 2022



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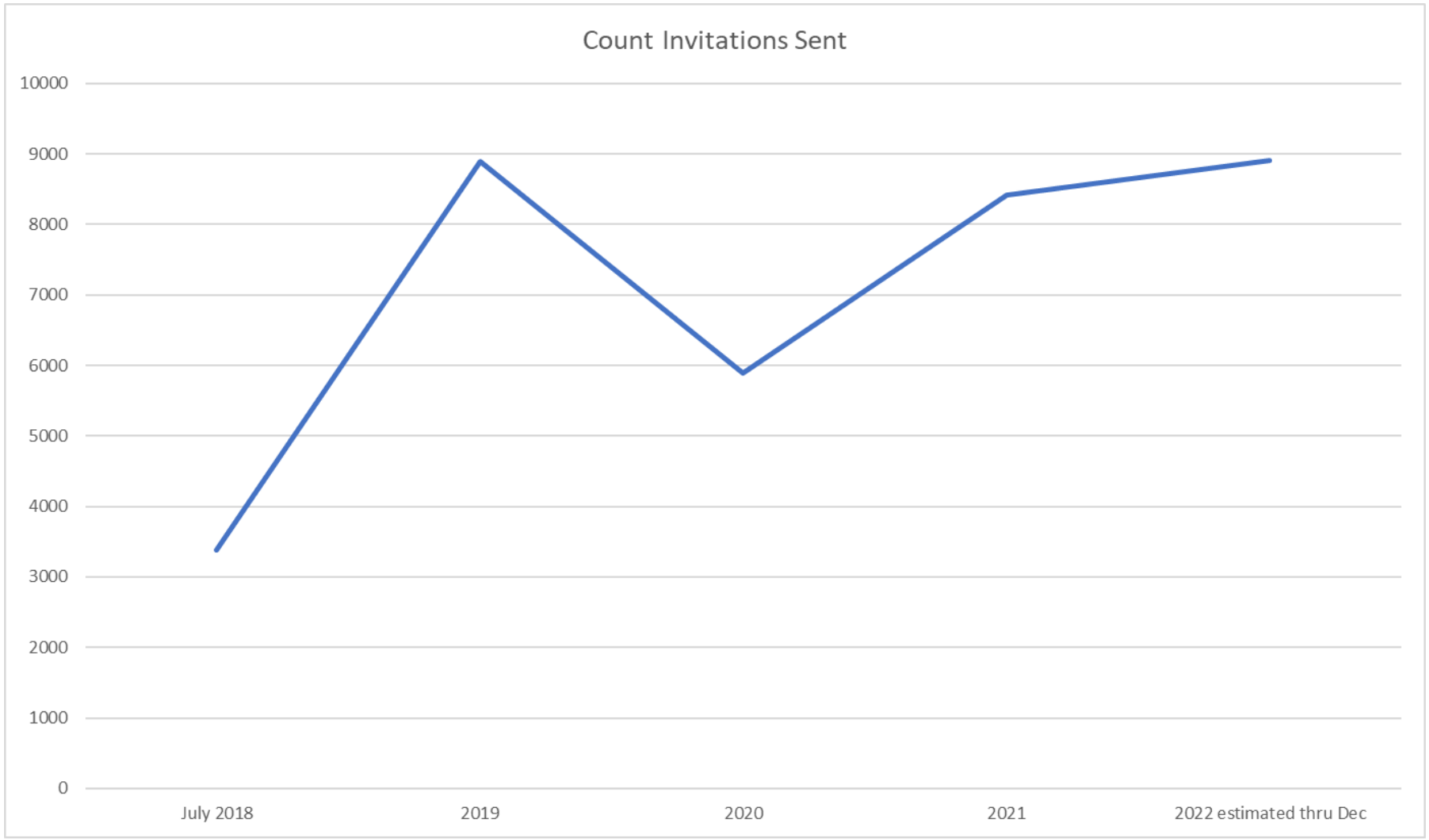
RECAP - FALL 2022: PAYMENTWORKS ONBOARDING / OVERVIEW

- Number PaymentWorks Invitations sent 2018-fall 2022: 34,200
- EOY Monthly (Apr/May/Jun) typically rises to: ~800 per month



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RECAP - FALL 2022: KEY ISSUES AND CHALLENGES

Process Stakeholders			
Department	Vendor	PaymentWorks	Procurement

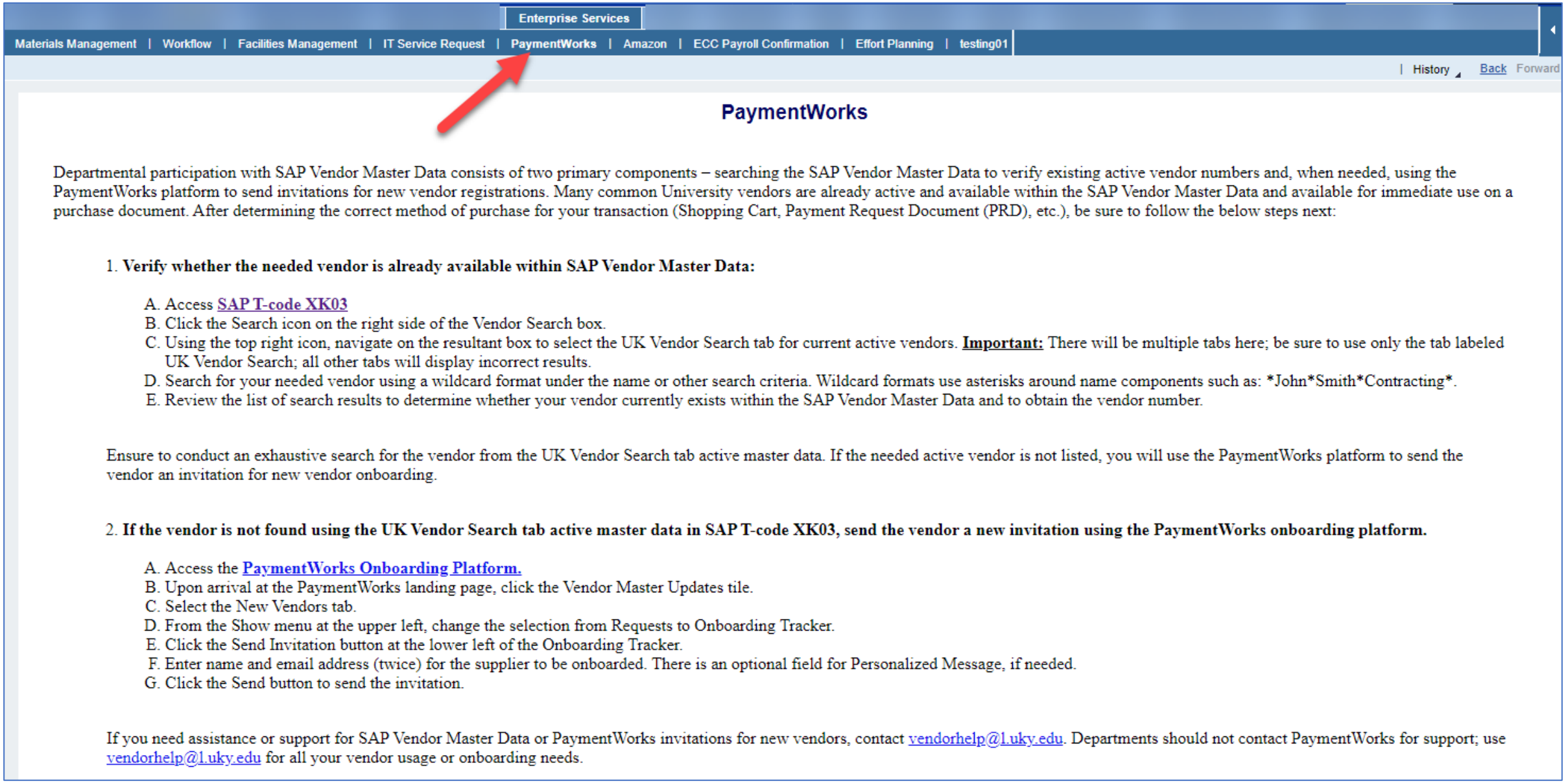
Characteristic	Status (As of Fall 2022, pre-revamp/transition)
Access (Dept)	Open-ended via myUK Enterprise Services tab, no formal role required, no potential to remove if needed
Training/working knowledge	No formal training required; Purchasing provides reference cards via website Some disconnect with SAP T-code related vendor lookups, occasional resistance to using available help resources
Role Boundaries	Not formally defined & misunderstood = potential for boundary violation
Onboarding scenarios	Increasing significantly
Vendor onboarding rate	Increasing to return of pre-pandemic rate
User count sending invites	Steady, but significant
Dept employee turnover	Increases rate of issues
Resources/Reference Materials	Vendorhelp email proven to be quality tool, but repetitive inquiries Current website materials need improved clarity, depth, and detail
Stakeholder frustration	Increasing based on above characteristics; creates delays, inefficiencies

UPDATE: REVAMP + TRANSITION COMPLETED JANUARY 2024

Revamp for PaymentWorks/Vendor Master Data (Dept) Users:

- Transition to role-based, similar to that of Shopper, Approver, Goods Confirmer
- New PaymentWorks tab assigned/removed per user; remains within Enterprise Services
- Course curriculum to maintain/receive the role/tab, 2 courses, ~30 mins each, myUK Learning:
  - Course 1 – FAST SAP Vendor Master Data and Onboarding (aka, “Concepts” course)
  - Course 2 – SAP Master Data and Onboarding – Technical
- Communicated via Purchasing listservs across summer into fall and late 2023/early 2024 + targeted emails to established 600+ PW users
- 1-17-24: ~450 employees took courses, received new tab

UPDATED PAYMENTWORKS LANDING PAGE 1-17-24



PaymentWorks

Departmental participation with SAP Vendor Master Data consists of two primary components – searching the SAP Vendor Master Data to verify existing active vendor numbers and, when needed, using the PaymentWorks platform to send invitations for new vendor registrations. Many common University vendors are already active and available within the SAP Vendor Master Data and available for immediate use on a purchase document. After determining the correct method of purchase for your transaction (Shopping Cart, Payment Request Document (PRD), etc.), be sure to follow the below steps next:

1. **Verify whether the needed vendor is already available within SAP Vendor Master Data:**

   A. Access SAP T-code XK03
   B. Click the Search icon on the right side of the Vendor Search box.
   C. Using the top right icon, navigate on the resultant box to select the UK Vendor Search tab for current active vendors. **Important:** There will be multiple tabs here; be sure to use only the tab labeled UK Vendor Search; all other tabs will display incorrect results.
   D. Search for your needed vendor using a wildcard format under the name or other search criteria. Wildcard formats use asterisks around name components such as: *John*Smith*Contracting*.
   E. Review the list of search results to determine whether your vendor currently exists within the SAP Vendor Master Data and to obtain the vendor number.

Ensure to conduct an exhaustive search for the vendor from the UK Vendor Search tab active master data. If the needed active vendor is not listed, you will use the PaymentWorks platform to send the vendor an invitation for new vendor onboarding.

2. **If the vendor is not found using the UK Vendor Search tab active master data in SAP T-code XK03, send the vendor a new invitation using the PaymentWorks onboarding platform.**

   A. Access the PaymentWorks Onboarding Platform.
   B. Upon arrival at the PaymentWorks landing page, click the Vendor Master Updates tile.
   C. Select the New Vendors tab.
   D. From the Show menu at the upper left, change the selection from Requests to Onboarding Tracker.
   E. Click the Send Invitation button at the lower left of the Onboarding Tracker.
   F. Enter name and email address (twice) for the supplier to be onboarded. There is an optional field for Personalized Message, if needed.
   G. Click the Send button to send the invitation.

If you need assistance or support for SAP Vendor Master Data or PaymentWorks invitations for new vendors, contact vendorhelp@l.uky.edu. Departments should not contact PaymentWorks for support; use vendorhelp@l.uky.edu for all your vendor usage or onboarding needs.

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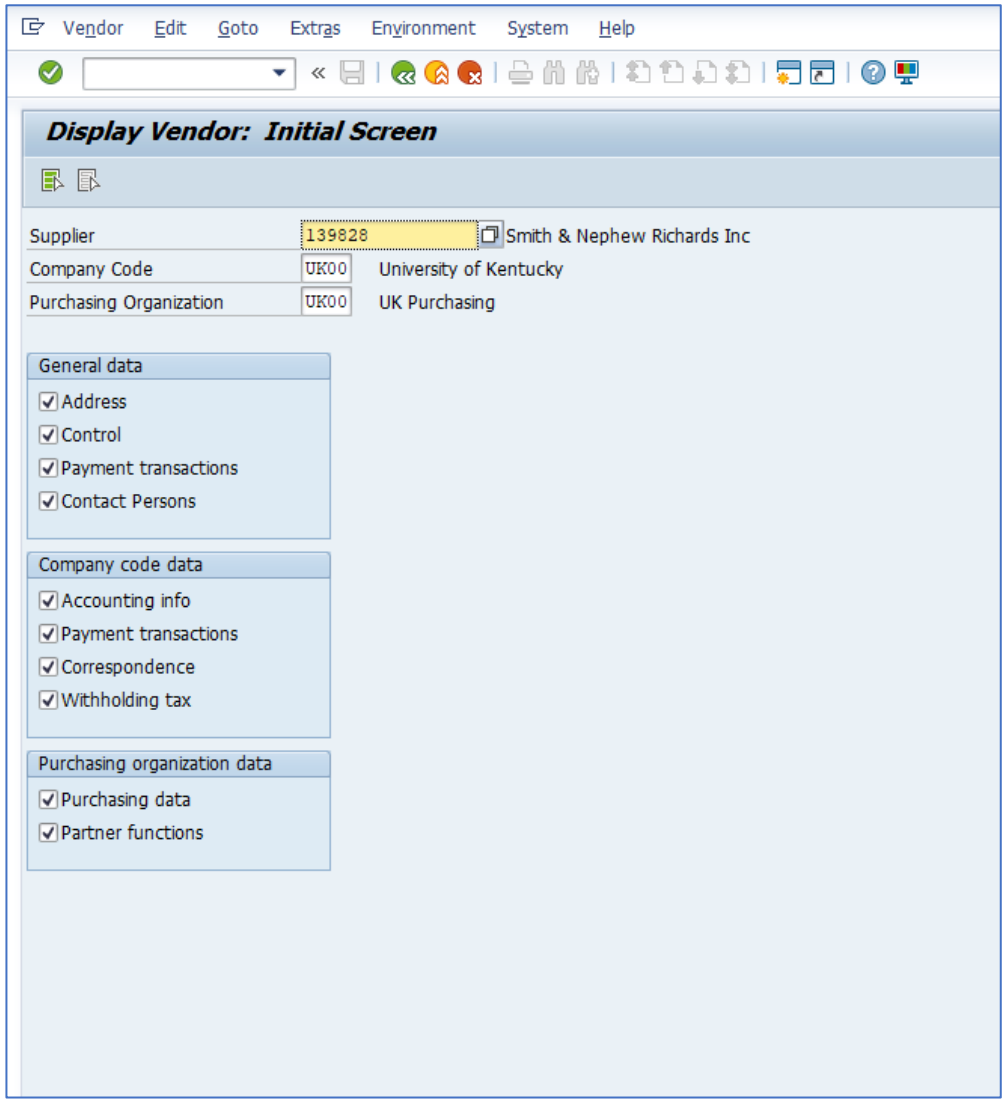
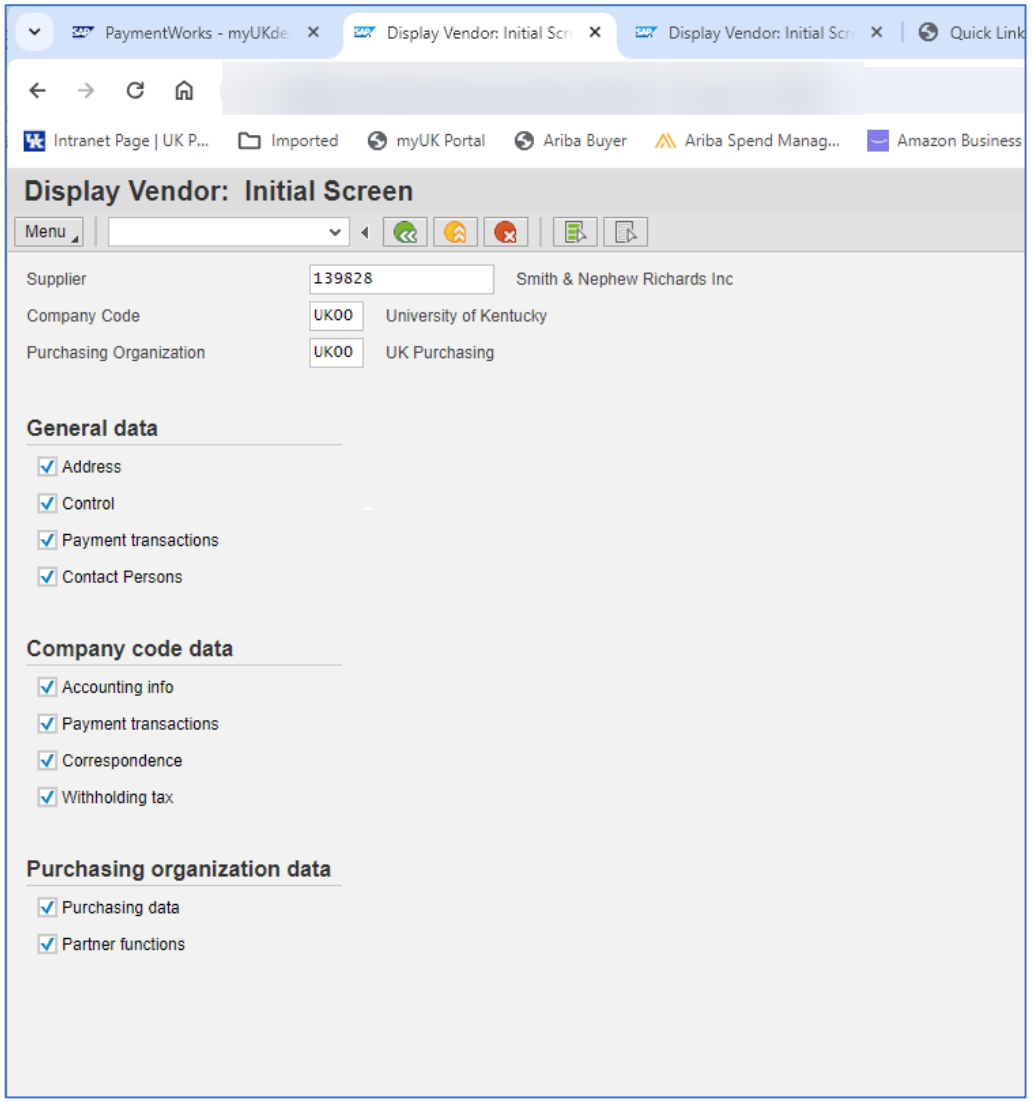
USERS HAVE TWO CHOICES FOR ACTIVE VENDOR LOOKUP



<< Traditional T-code

OR

>> New Web-Interface



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UPDATE: REVAMP COMPLETED SUMMER 2023

- Revamp / modernization of all Purchasing website reference materials:

- Dedicated section (D) on Learning Page, higher page placement, with more visibility
- PDFs for both myUK Learning Courses for reference
- Quick Help Guides: How to Search SAP Vendor Data, How to Send PaymentWorks invite
- Visual matrices: Roles and separation of duties, support decision-making, onboarding status indicators
- FAQ section – 60 questions and answers, top 10 listed directly on Learning Page
- All previous materials removed

Resource Number	Learning Resource Name	Learning Resource Description
D-01	SAP Vendor Master Data and PaymentWorks Onboarding – Concepts	High-level, broad concepts regarding SAP Vendor Master Data and PaymentWorks New Vendor Onboarding platform.
D-02	Vendor Master Data and PaymentWorks Onboarding – Technical	Technical approach to conduct needed tasks related to SAP Vendor Master Data searches and sending/monitoring new vendor onboarding invitations via Enterprise Services / PaymentWorks tab.
D-03	Quick Help Guide - How to Search SAP Master Data	Expedited help guide to search SAP Vendor Master Data for specific vendor(s).
D-04	Quick Help Guide - Using PaymentWorks – Invitations and Onboarding Dashboard	Expedited help guide to send invitations for and monitoring of new vendor onboarding invitations via the PaymentWorks platform.

GOING FORWARD

- Those seeking access/role for first time after 1-17-24 would follow Training Request Plan process
- For new role assignments, serve pre-requisites for those applying for Shopper, SAP Requisitioner, or PRD Creator role
- Available resources and references:
  - Procurement Services Learning Page (Section D)
  - Email vendorhelp@l.uky.edu

QUESTIONS:

PAYMENTWORKS

NEXT UP: MYUK AMAZON BUSINESS UPDATE

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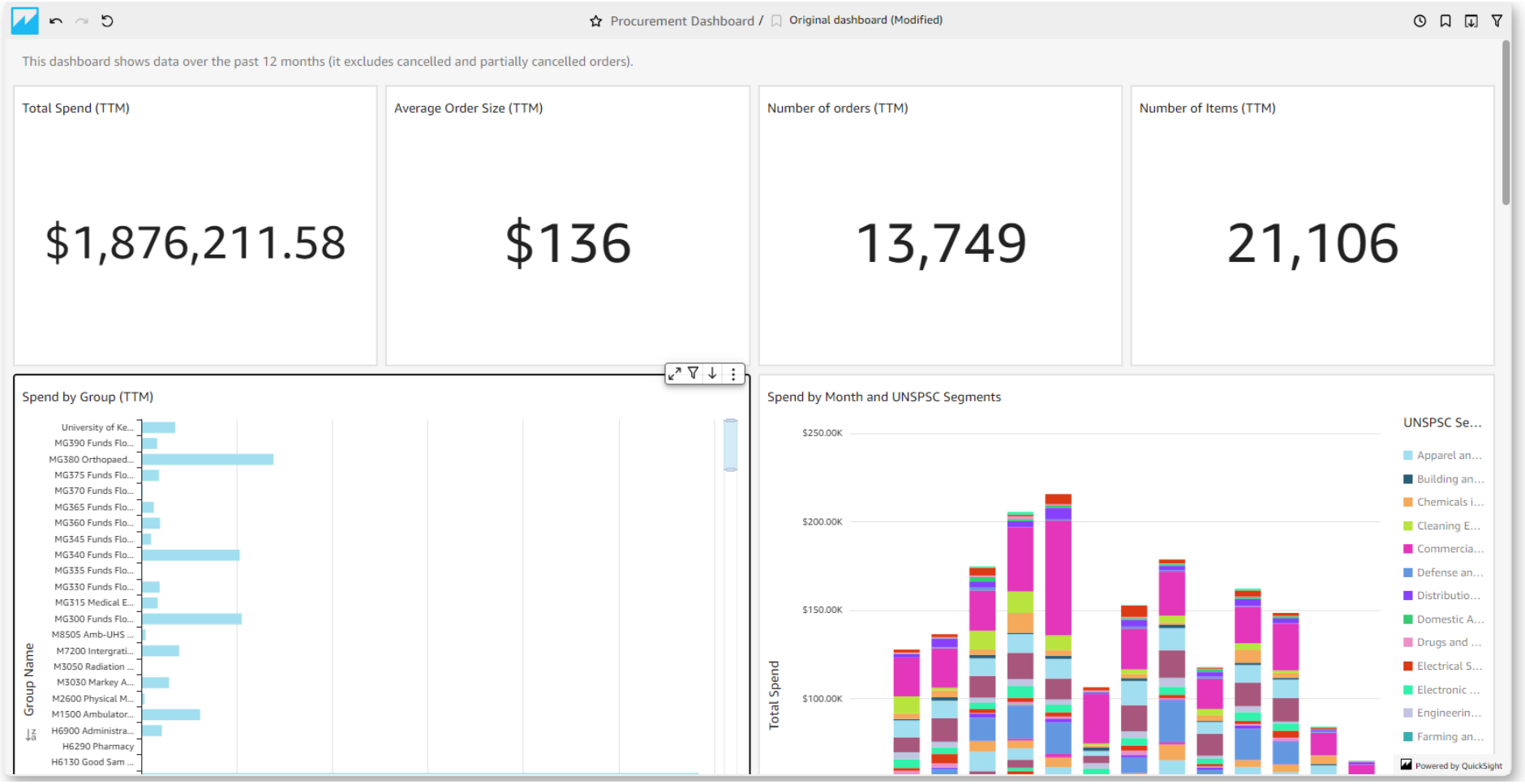
MYUK AMAZON BUSINESS RECAP/TIMELINE TO DATE

- January through August 2022 – Build and prep platform for deployment
- August 2022 – Go-Live Academic Campus
- September 2022 into spring 2023 – continued onboarding, migration of departmental accounts, cleanup, support. Also, onboarding of users with declining balance p-card needs for research
- Spring to August 2023 – Prep for UK HealthCare migration into myUK
- August 2023 – Migration of 125+ UKHC user platform into myUK
- Fall into winter 2023 – Continued UKHC support and onboarding, auditing (~125) and cleanup campus-wide
- Some remaining spring 2024; project/platform is virtually complete and engaged institution-wide.

METRICS TODAY

- 500+ departmental groups w/ 360 approvers (some serve multiple depts)
- 735 active Amazon shoppers creating orders during CY23



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INSTITUTIONAL SPEND OVERVIEW

Overview for Jul-Sep 2023

As compared to previous quarter

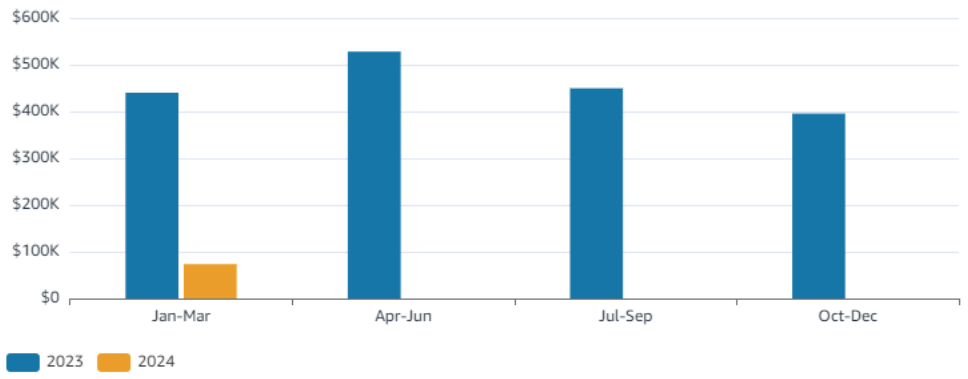
Total spend	Total savings	Total orders	Top category
$450K Down by 15%	$11K Down by 17%	3320	$59K Book

Overview for Oct-Dec 2023

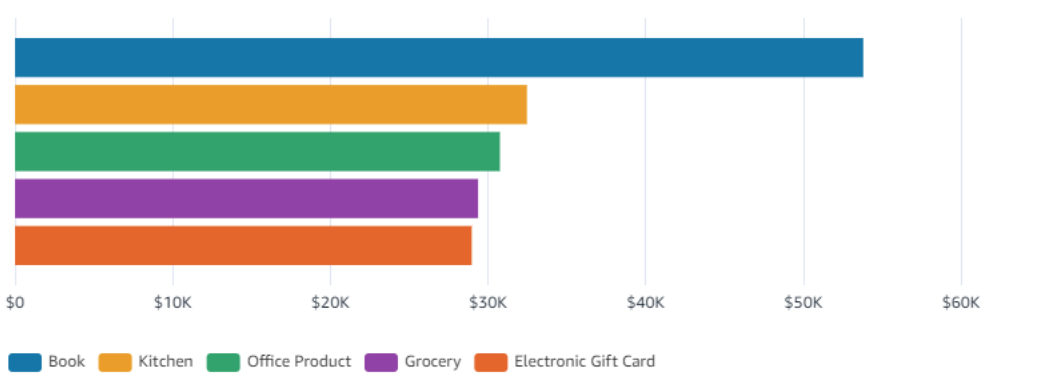
As compared to previous quarter

Total spend	Total savings	Total orders	Top category
$396K Down by 12%	$8.1K Down by 25%	3016	$54K Book

Annual spend comparison



Spend by category



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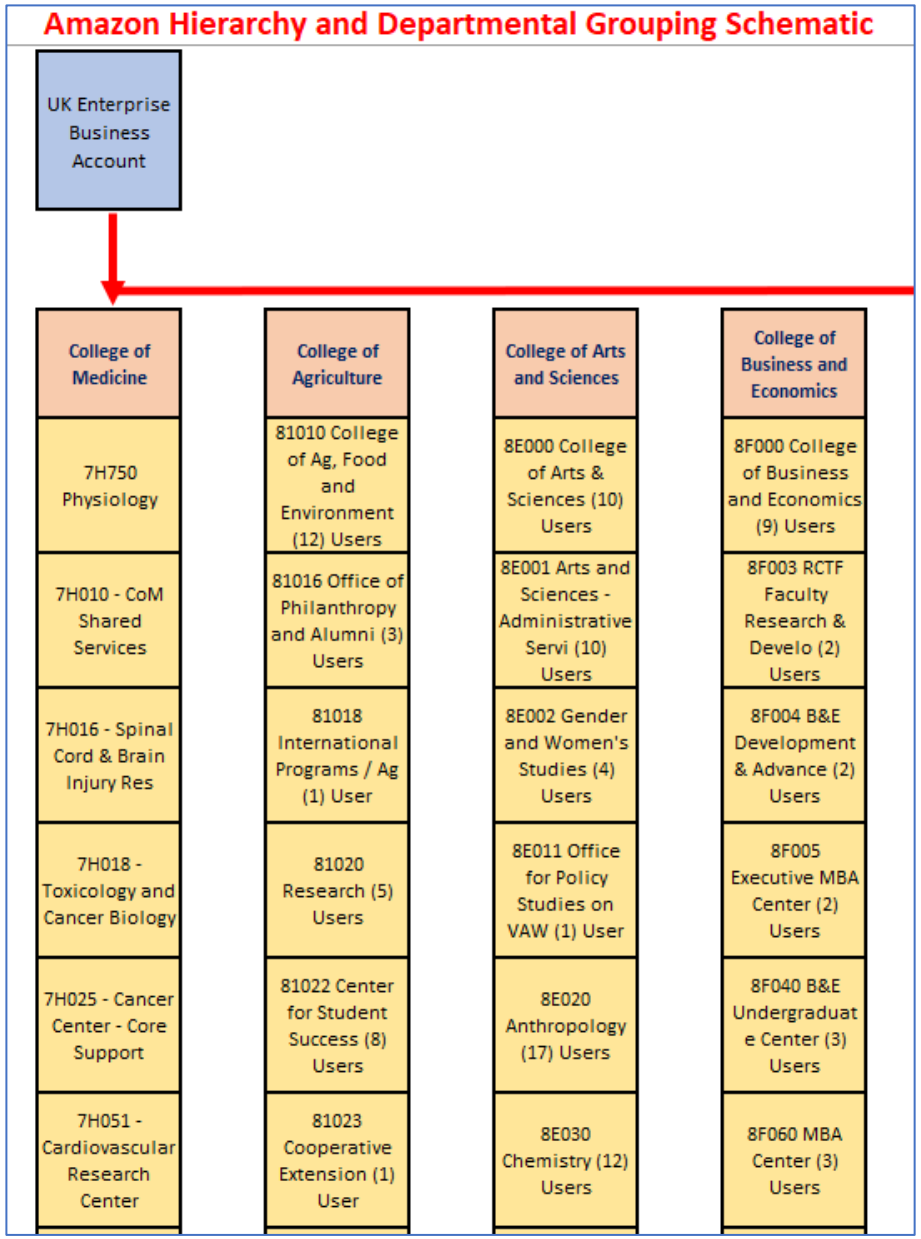
PLATFORM OPTIMIZATION

- myUK Amazon Business provides a limited number of analytics licenses as part of its institutional membership
- Current/next project: Deploying and optimizing analytics licenses (high-level)
    - Potential license holders currently being identified at top of college, unit levels
    - Licenses in process of being assigned
    - Provide access to dashboards and metrics for college/unit Amazon transaction streams

PLATFORM OPTIMIZATION



College or unit	Name
College of Communication and Information	License Holder 1
	License Holder 2
College of Dentistry	License Holder 1
College of Design	License Holder 1
	License Holder 2
College of Education	License Holder 1
	License Holder 2
College of Engineering	License Holder 1
	License Holder 2
College of Fine Arts	License Holder 1
	License Holder 2
College of Health Sciences	License Holder 1
	License Holder 2
College of Law	License Holder 1
College of Nursing	License Holder 1
	License Holder 2

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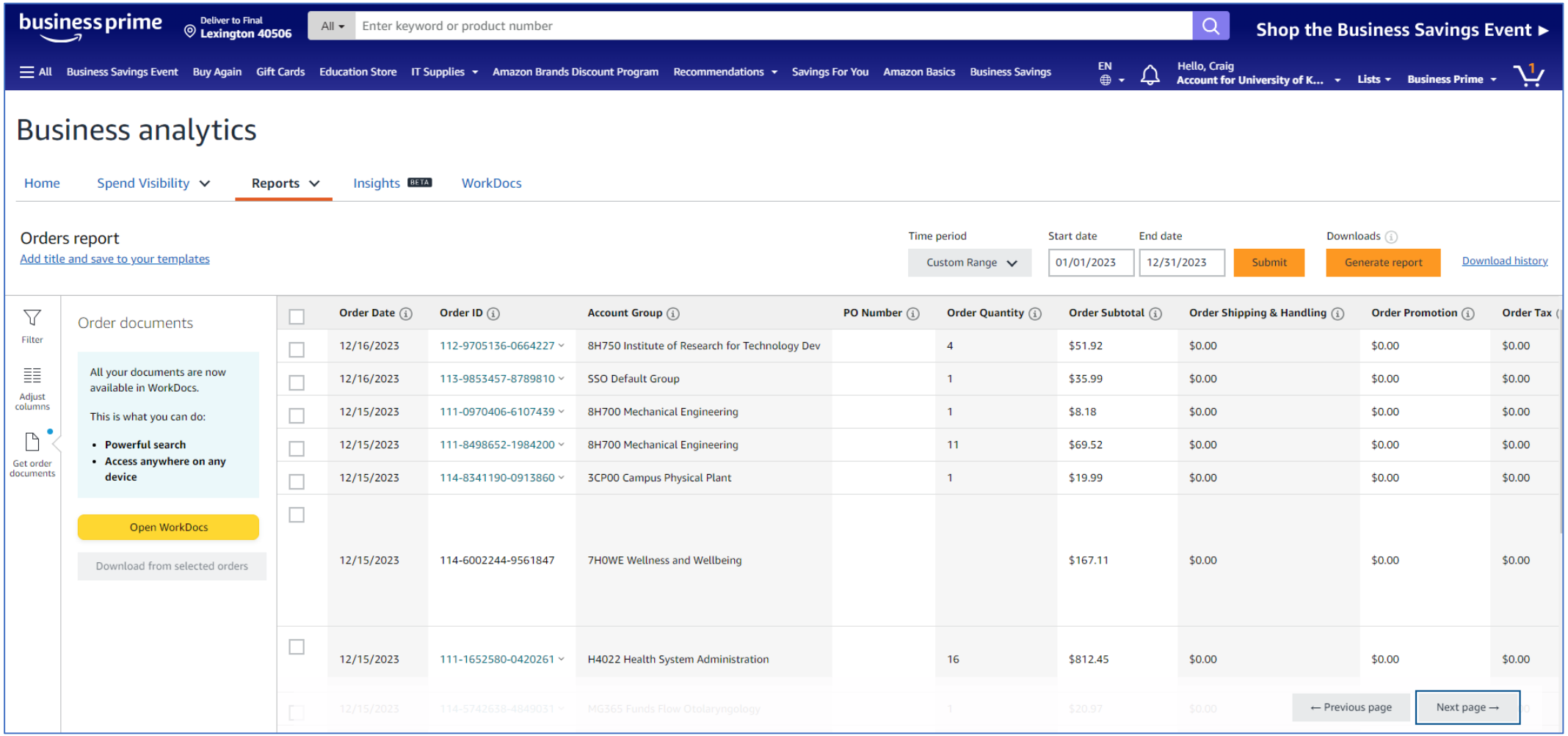
PLATFORM OPTIMIZATION – ADDITIONAL ANALYTICS DOWNLOADS

- License holders can also download/analyze raw data directly to their desktops, 50+ fields, very robust



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NEXT STEPS – ANALYTICS LICENSES

- Final determination of Amazon analytics licenses users (in process)
- Online learning session soon extended to those users; how to use analytics tools
- New learning materials on Procurement Services Learning page, section C (done)
- Follow-up session, two months out with users
- Yearly check-in (are licenses still used/needed, assignment changes needed, etc.?)

    - Note: limited number of licenses; other units can request ad-hoc reports via amazon@l.uky.edu if needed

QUESTIONS:

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