Source2Pay Project

Process – Create a Purchase Requisition

Current State

Focus Group Meeting

October 25 – 27, 2016
Agenda

- Welcome
- Introductions
- Source2Pay Project Overview
- Project’s Process Details
- Process Current State
- Current State Identify Issues
- Next in the project’s process
- Questions
Welcome!

- Introductions
  - Name
  - Department
  - Current Job
  - Goal for being participating on a Focus Group
Source2Pay Project

- Our current source-to-pay procedures at the University has significant opportunities for improvement and impact every department within the University system.
Project Purpose/Goal

- Identify process improvements throughout source to pay process
- Develop RFP
- Ultimate goal is to minimize, improve & standardize IT platforms
Project Process

- Capture Current State
  - Map process
  - Current state document
  - Present to campus in focus group setting
  - Present feedback to the team
  - Finalize current state
  - Present to Director Council
Project Process

- Create Future State
  - Map process
  - Identify Issues
  - Brainstorm recommendations
  - Present to campus in focus group setting
  - Present feedback to the team
  - Finalize proposed solutions
  - Present to Director Council
Create a Purchase Requisition

Process Boundaries
Start: Vendor identified for the purchase of a good/service

End: Completed/Approved requisition transmitted.
Create a Purchase Requisition

Receive purchase request → Process purchase request → Create Requisition → Obtain Approvals → Transmit
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Create a Purchase Requisition

1. Receive purchase request
2. Process purchase request
3. Create Requisition
4. Obtain Approvals
5. Transmit
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Create a Purchase Requisition

1. Receive purchase request
2. Process purchase request
3. Create Requisition
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5. Transmit
What do you do to Create Purchase Requisition?
Current State

Issues with the current process?
Next Steps

- Present feedback to Project’s process Team
- Finalize current state
- Begin future state
- Present future state to each campus
Contact Information

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Thank YOU!