Source2Pay Project

Process – Create a Purchase Requisition

Future State

Focus Group Meeting

December 6 – 8, 2016
Agenda

- Welcome
- Introductions
- Current State Process Overview
- Current State Identified Issues
- Future State Recommendation
- Next in the project’s process
- Questions
Welcome!

- Introductions
  - Name
  - Department
  - Current Job
  - Goal for being participating on a Focus Group
Create a Purchase Requisition

Current State Overview

Receive purchase request
Confirm compliance documentation
Create requisition
Obtain approvals
Transmit Requisition
Create Purchase Requisition

Current State Identified Issues

- Communication – Issues related to providing information
- Human/User Error – Issues related to data entered into the system
- Process/Procedures – Issues related to current process and procedures
Create Purchase Requisition

Current State Identified Issues

- System Limitation – Issues related to the limitation of the current system applications
- Training – Issue related to lack of understanding on how to create a purchase requisition
- Multi systems
Create Purchase Requisition

Future State Recommendations

Create a solution to communicate the status of where a requisition is within the process.
Create a Purchase Requisition

Future State Recommendations

Develop a functionality to alert a user when a vendor’s information needs to be reviewed and updated with current information.
Create a Purchase Requisition

Future State Recommendations

Create a single location to communicate information regarding ‘Creating a requisition’.
Create a Purchase Requisition

Future State Recommendations

Determine ways to reduce non-conforming purchase orders.
Create a Purchase Requisition
Future State Recommendations

Develop consistencies in the procedures and provide a shared understanding by all users.
Create a Purchase Requisition
Future State Recommendations

Refine the existing training program on ‘Create a requisition’ to ensure the attendees have a shared knowledge of the requisition process.
Create a Purchase Requisition

Future State Recommendations

Require Users of the requisition system to attend training prior to access being granted to create a requisition.
Create a Purchase Requisition

Future State Recommendations

Work with existing system vendors to enhance capabilities until a new system can be implemented.
Create a Purchase Requisition
Future State Recommendations

Ability to import certified vendor information for diverse vendors into vendor ID in system.
Create a Purchase Requisition

Future State Recommendations

A new Source to Pay application should have ability to support the functionality of creating a requisition.
Create a Purchase Requisition

Future State

1. Receive purchase request
2. Receive electronic quote(s)
3. Confirm compliance documentation
4. Create requisition
5. Obtain approvals
6. Transmit Requisition
Next Steps

- Present feedback to Project’s process Team
- Finalize future state
Contact Information

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Thank YOU!