UNIVERSITY OF ILLINOIS

URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD

Source2Pay Project

Process – Create a Purchase Requisition
Future State
Focus Group Meeting
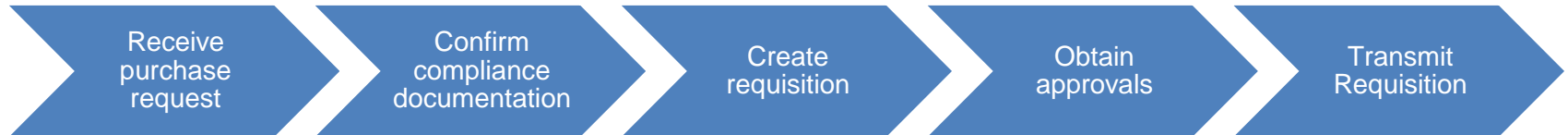December 6 – 8, 2016

Agenda

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

OFFICE OF BUSINESS AND FINANCIAL SERVICES – Business Solutions and Support 12/12/2016 **2**

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.

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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

Receive purchase request	Receive electronic quote(s)	Confirm compliance documentation	Create requisition	Obtain approvals	Transmit Requisition

Next Steps

- Present feedback to Project's process Team
- Finalize future state

Contact Information

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Thank YOU!