Source2Pay Project

Process – Research Purchase Options

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
Research Purchase Options
Current State Overview

Need for good and/or service → Research → Determine Method to obtain good and/or service → Submit request for processing requisition
Research Purchase Options
Current State Identified Issues

- System - issues related to system’s lack of ability to integrate and system functionality
- Policy – issues related to procurement policy
- Training – issues related to lack of understanding the process
Research Purchase Options

Current State Identified Issues

- Communication – issues related to providing information
- Organizational Acceptance – issues related to following policy
Develop enhancements to the policy code to provide a clear understanding of compliance and reduce the amount of effort to receive approval to purchase a good or service.
Research Purchase Options

Future State Recommendations

Develop a training program on the policies and procedures to be followed when researching and selecting a good and/or service to be used by the University.

Once the training program has been developed set the training as mandatory prior to receiving access to the system(s) which include iBuy, Banner, P-Card, and T-Card.
Research Purchase Options
Future State Recommendations

Develop a mandate for the University to use Awarded Vendors and contracts.
Research Purchase Options
Future State Recommendations

Develop a consolidated listing of all awarded contracts that is available to all users.
Research Purchase Options

Future State Recommendations

A new Source to Pay application should have ability to support the functionality of researching purchase options for goods and/or services.
Next Steps

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

Kristi Moore
OBFS - Business Solutions & Support
klmoore@uillinois.edu
217-333-6259
Thank YOU!