

# Source2Pay Project

Process – Requisition Review & Assignment  
Current State  
Focus Group Meeting  
January 24 – 26, 2017

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# 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

# Process – Requisition Review & Assignment

## Purpose of the process

The process 'Requisition Review & Assignment' exist to:

- 'Perform a high-level review of the requisition and then assign the requisition to a buyer.

- The requisition is reviewed for the complexity of the commodity being purchased and the level of experience of the buyer to review the entire requisition and generate a purchase order.

- In addition, this process provides the ability to manage the work assignments to all purchasing buyers.'



# Process – Requisition Review & Assignment

## Process Boundaries

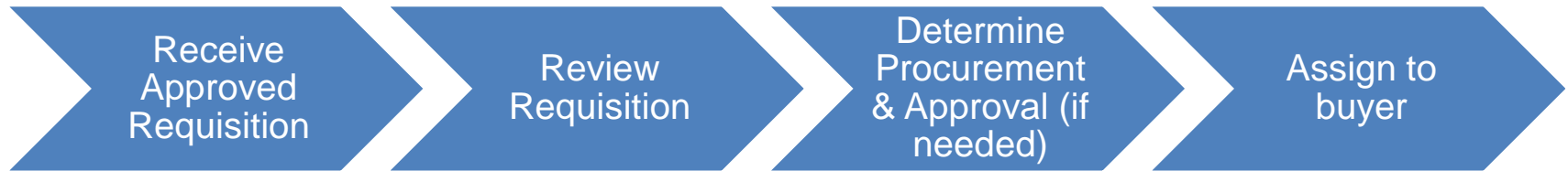
### Begins:

When there is a transmission to purchasing

### Ends:

When a requisition is reviewed for completeness and purchase authority has been determined and assigned to a buyer

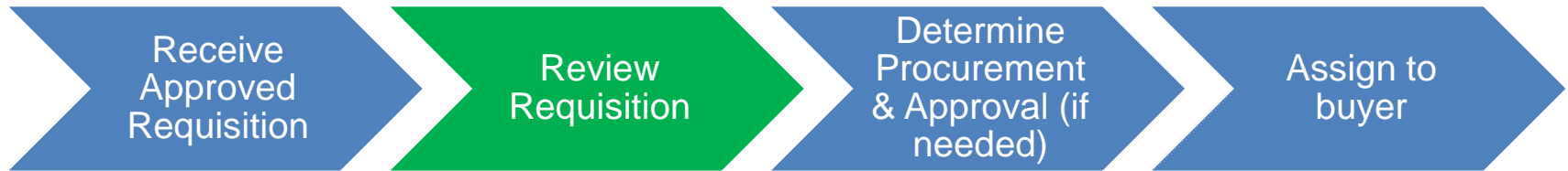
# Process – Requisition Review & Assignment



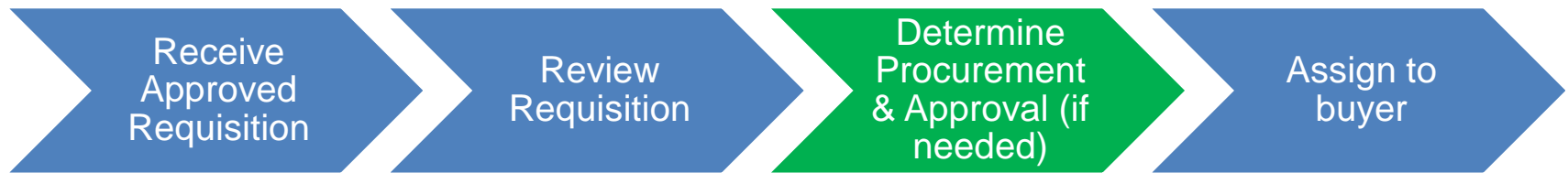
# Process – Requisition Review & Assignment



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# Process – Requisition Review & Assignment



# Process – Requisition Review & Assignment



# How are you involved in the Requisition Review & Assignment process?

# 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!