Source2Pay Project

Process – Requisition Review & Assignment

Current State

Focus Group Meeting

January 24 – 26, 2017
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

*Begin*: When there is a transmission to purchasing

*End*: When a requisition is reviewed for completeness and purchase authority has been determined and assigned to a buyer
Process – Requisition Review & Assignment

1. Receive Approved Requisition
2. Review Requisition
3. Determine Procurement & Approval (if needed)
4. Assign to buyer
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OFFICE OF BUSINESS AND FINANCIAL SERVICES – Business Solutions & Support
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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!