Source2Pay Project

Process – Purchase Order Processing

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 – Purchase Order Processing

Purpose of the process
To provide a financial/fiscal commitment and/or to purchase a good or service between the University and a vendor.
Process – Purchase Order Process

Process Boundaries

**Begins:**
requisition has been assigned to a purchasing buyer.

**Ends:**
when a vendor receives a completed and approved purchase order
Process – Purchase Order Processing

1. Receives Approved Requisition
2. Review Requisition for Completeness
3. Obtain Additional Documentation
4. Create Purchase Order
5. Complete Purchase Order
Process – Purchase Order Processing

Receives Approved Requisition

Review Requisition for Completeness

Obtain Additional Documentation

Create Purchase Order

Complete Purchase Order
Process – Purchase Order Processing
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What do you do to Process Purchase Orders?
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!