Source2Pay Project

Process – Requisition Review & Assignment
Future State
Focus Group Meeting
February 28, March 1 & 2, 2017
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
Requisition Review & Assignment

Current State Overview

1. Receive Approved Requisition
2. Review Requisition
3. Determine Procurement & Approval (if needed)
4. Assign to buyer
Requisition Review & Assignment

Current State Identified Issues

- Communications
  - Issues related to providing information

- Resources
  - Issues related to lack of sufficient staff or funding
Requisition Review & Assignment
Current State Identified Issues

- Technology
  - Issues related to system’s lack of functionality to support the process
  - Examples
    - Display information
    - Send Notification
    - Attachments
Requisition Review & Assignment

Future State Recommendations

More Staff or better allocation of current staff
Requisition Review & Assignment

Future State Recommendations

Work with existing system vendors to enhance functional capabilities until a new system can be implemented.
Requisition Review & Assignment
Future State Recommendations

Send a notification to the requisitioner when the requisition is assigned to a buyer
Requisition Review & Assignment
Future State Recommendations

Attach documents to a requisition
Requisition Review & Assignment
Future State Recommendations

Route a requisition containing a radioactive and/or control substance for the appropriate review for proper permits and isotope numbers and receive approval prior to placing the purchase.
Requisition Review & Assignment
Future State Recommendations

Central communications area to upload requisition documentation and provide comments
Requisition Review & Assignment

Future System Functionality

- The ability to track workload of buyer assignment
- The ability to have defined level requisition assignment, e.g. Requisition type – Solicitation, RFI, RPF, dollar amount)
- The ability to return a requisition to the requisitioner
- The ability to have documents attached to the requisition, and remain associated to the requisition as it progresses through the workflow
- The ability to view main information of a requisition without having to view the entire requisition, information including; Chart/Org, department, vendor
Requisition Review & Assignment
Future System Functionality

- The ability to define a renewal frequency to a requisition, e.g. standing order
- The ability to define a type of requisition, renewal, standing order
- The ability to allow for data integration between system applications
- The ability to have a wizard type of application to guide the user when creating a requisition, define the type, and prompt for attachment of required documentation
- The ability to view the attached documentation
Requisition Review & Assignment

Future System Functionality

- The ability to base approvals on the type of commodity being purchased, e.g. Radioactive, controlled substance needs approval prior to routing requisition to purchasing
- The ability to send an email notification at defined steps/statuses within a workflow, assigning a requisition to a buyer
- The ability to assign multiple requisitions easily, drag and drop functionality
- The ability to attach documents by different roles; requisitoner, buyer
- The ability to have an assigner screen display:
  - Requisition amount
  - Requisitioner information – e.g. Name, email address, phone number
  - Requisition type – Sole Source, CFS, RFP
  - Attached documentation
Requisition Review & Assignment

Future System Functionality

- The ability to return a requisition for additional information to the requisition once approval has been obtained, without having to route through the approval process again
- The ability to include internal and external notes
- The ability to view a workflow in the format of a dashboard
- The ability to set specific approval queues, specific commodities
- The ability to define the assignment to a buyer based on predefined data being met.
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!