UNIVERSITY OF ILLINOIS

URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD

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

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD

Requisition Review & Assignment Current State Overview

Receive Approved Requisition → Review Requisition → Determine Procurement & Approval (if needed) → 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

UNIVERSITY OF ILLINOIS

URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD

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 has 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 purchase, 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 obtain, 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

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD

Thank YOU!