Source2Pay Project

Process – Purchase Order Processing

Future State

Focus Group Meeting

February 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
Current State Overview

- Receives Approved Requisition
- Review Requisition for Completeness
- Obtain Additional Documentation
- Create Purchase Order
- Complete Purchase Order
Current State Categories of Issues

- Documentation – Issues related to lack of documentation
- Policy/Procedures – Issues related to Procurement Policies and Procedures
- Resources (Financial, Human) – Issues related to lack of sufficient staff or funding
- Technology – Issues related to system’s lack of functionality to support the process
- Training – Issues related to lack of understanding the process
Issues Identified:

- No status of where things are in the process
- No notification of complete POs in Banner
- Getting/having all the required & complete information to proceed (missing info and documents)
- Inconsistent approval levels for buyers
- Relief on the Procurement Code
- Buyers have too many requisitions/big workload
- Lack of staff
- Inconsistent approval levels for buyers
Recommendations

1. Update Banner so that when a PO is approved or printed the requestor is emailed or notified – It is most important for requestors to have the PO number

2. Documentation checklist for requestors
Recommendations

3. Procurement code changes

4. Hire more staff
Recommendations

5. Use iBuy more at UIUC & UIS

6. Raise the iBuy threshold to $10K

7. Update buyers approval in all systems
Recommendations

8. Offer hands on open forums/lab between purchasing & units (quarterly or semiannually)

9. Overall & targeted training (specific purchases like purchases with federal funds and on-boarding of new staff) on policies and process for department and buyers
Recommendations

10. Create Training Manuals
Your Input

- What are your recommendations?
Next Steps

- Present feedback to Project’s process Team
- Finalize future state
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Thank YOU!