

Source2Pay Project

Process – Receiving Products and Services
Current State
Focus Group Meeting
April 2017

Agenda

- Welcome/Introductions
- Source-to-Pay 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 – Receiving Products and Services

Purpose of the process

The process 'Receiving Products and Services' exist to:

'Acknowledge the product or service is received by the University and payment can be issued'

Process – Receiving Products and Services

Process Boundaries

Begins:

When one of the following situations occur:

- 'Receipt Required' noted on the purchase order in the Banner System
- A Banner Invoice totals in the amount of \$50,000 or more
- e-Invoice in iBuy contains a line item of \$5,000 or more

Ends:

Department unit acknowledges receipt of a good or service in the Banner system or iBuy

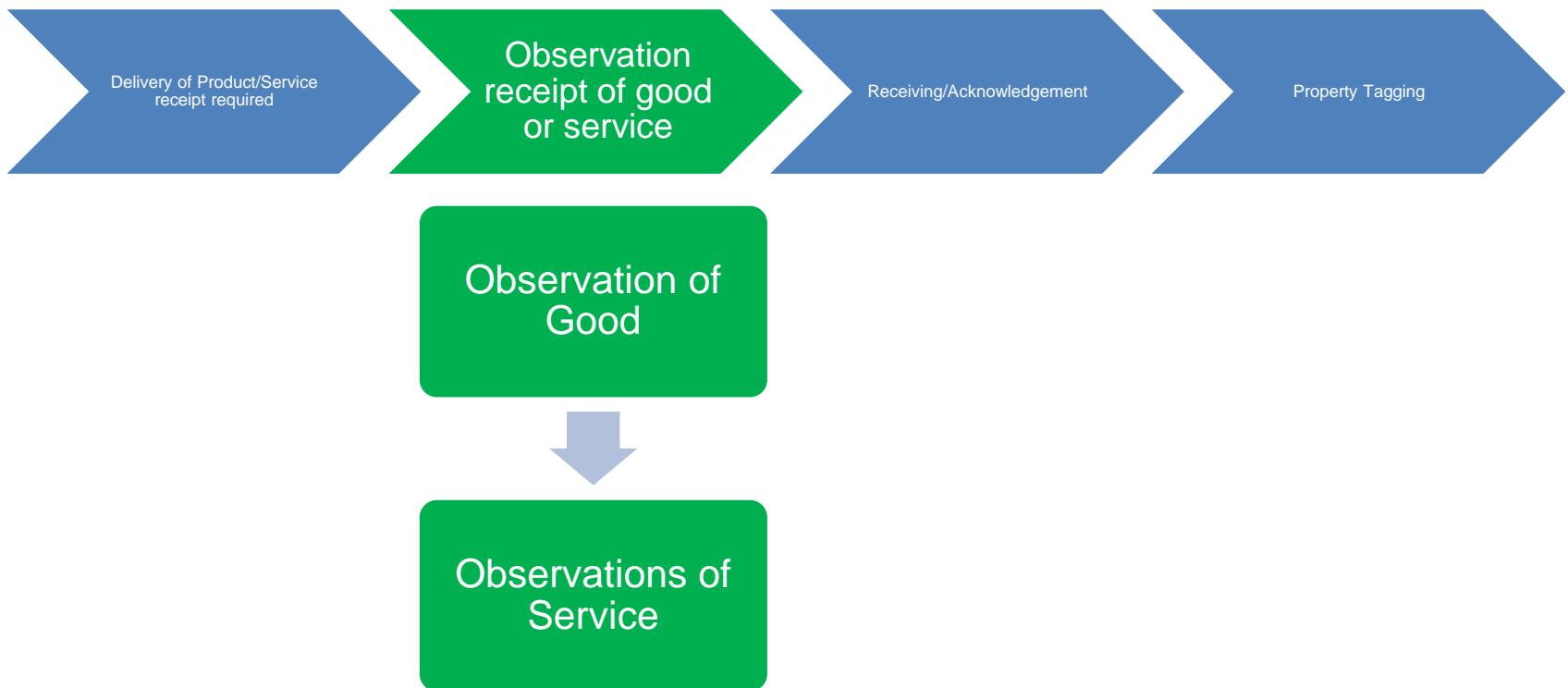
Process – Receive Products or Services



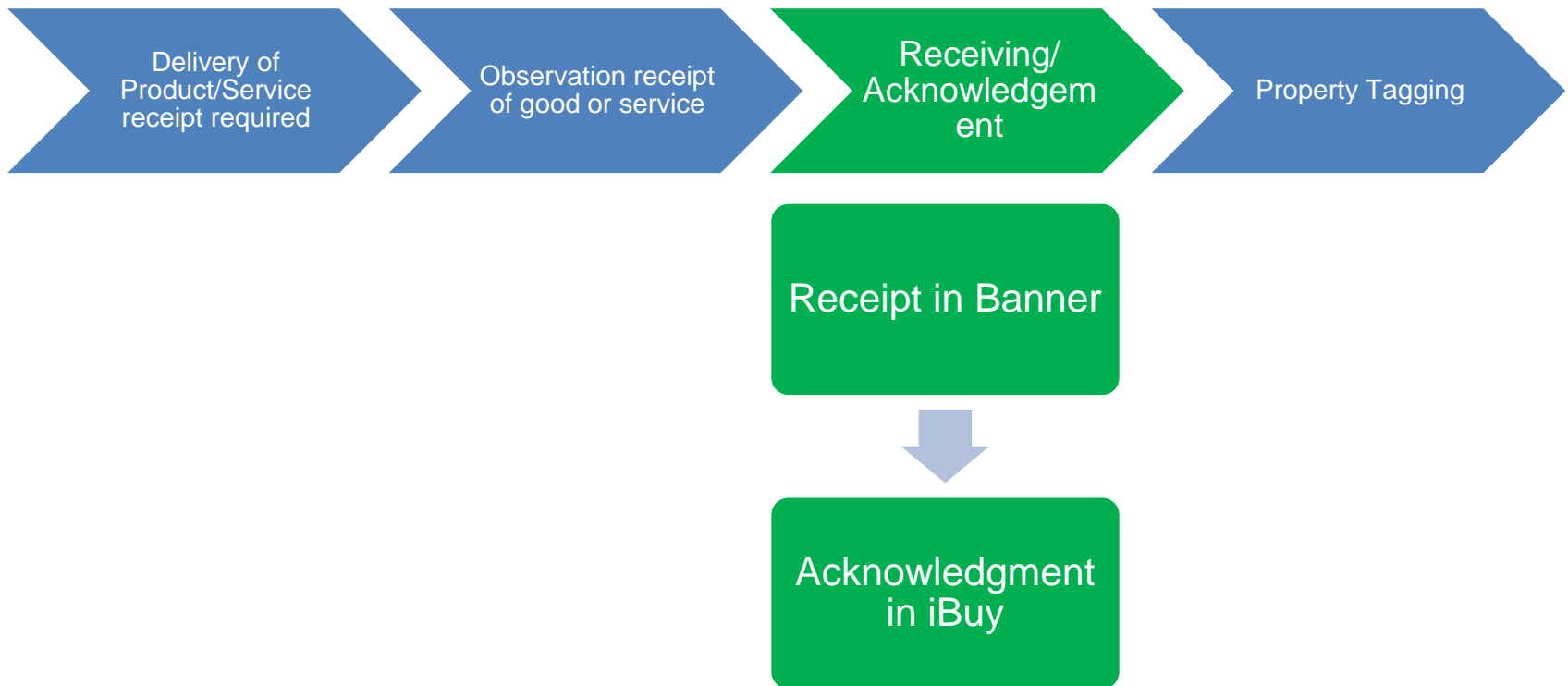
Process – Receive Products or Services



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Process – Receive Products or Services



What do you do to Receive Products or Services?

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!