Source2Pay Project

Process – Contract Processing
Future State
Focus Group Meeting
May 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
Contract Processing
Current State Overview

1. Identify Need/Obtain Approvals
2. Draft/Review/Edit Contract
3. Negotiate Contract
4. Approvals/Execution of Contract
Contract Processing
Current State Identified Issues

Communication –

Issues related to providing information

- Purchasing unable to review in a timely manner
- Departments initiates contracts with the wrong contract processing office
- Difficult to know who to call
Contract Processing
Current State Identified Issues

Documentation –
Issues related to lack of documentation

- Unclear and no written guidelines
- Departments submit incomplete or inaccurate contract information
- Difficult to know who to call
Contract Processing
Current State Identified Issues

Policy and Procedures – Issues related to Procurement Policies and Procedures
  ▪ Departments receive incorrect or conflicting guidance from OBFS offices

Resources – Issue related to lack of sufficient staff or funding
  ▪ Not enough time or staff to quickly and efficiently review all agreements due to volume of requests and staffing shortages
Contract Processing
Current State Identified Issues

Technology –
Issues related to system’s lack of functionality to support the process

- Due to multiple entry points, it is a challenge to assign and track contract status
- Learning curve of iCS application
Contract Processing
Current State Identified Issues

Training –
Issues related to lack of understanding the process

- Departments submit incomplete or inaccurate contract information
- Departments receive incorrect or conflicting guidance from OBFS offices
- Some iCS training only happens once a year
Contract Processing
Future State Recommendations

Develop a University job aid on what contract types are processed by which specific office
Contract Processing

Future State Recommendations

Develop Purchasing Contracts 101 training for users to learn best practices for creating a purchasing contract.
Contract Processing

Future State Recommendations

Fill vacancies/increase staffing for the position of contract coordinators and support staff.
Contract Processing
Future State Recommendations

Develop an alternative model to train users in the iCS application
Contract Processing
Future State Recommendations

Explore the possibility of a view-only role within the iCS application
Contract Processing
Future State Recommendations

Process contract consistently across the University System.
Contract Processing
Future State Recommendations

More transparency between department and purchasing
Contract Processing
Future State Recommendations

Increase the threshold for contract for service under $10,000 template to $20,000 with ongoing post audit
Contract Processing
Future State Recommendations

Option/Program for more delegated authority to department
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Future System Requirements

- Ability to have workflow tracking
- Ability to create/generate reports
- Ability to access historical contract information
- Ability to provide an audit trail (Include documentation of action that occur within the system, timestamping throughout the workflow process)
- Ability to access contracts via a web based application
- Ability to obtain/perform electronic signatures
- Ability to separate and identify types of contracts, payable, No Fund, Revenue Generating
- Ability to track multiple contract versions
- Ability to provide and electronic repository of fully executed contracts
Contract Processing
Future System Requirements

- Ability to provide a user friendly interface
  - Intuitive
  - Easy to interpret
  - Provides an ease of use
  - Screen guides user through the action to be performed

- Ability to provide an acceptable response time to the user
  - Displays an indicator on the screen when there is interaction to indicate something is being processed
  - Instantaneous response
Contract Processing

Future System Requirements

- Ability to provide transparency of transaction status
- Ability to not utilize JAVA
- Ability to run seamlessly on all major web browsers
- Ability to provide ‘Drag and Drop’ functionality for uploading documents
- Ability to provide Historical trails
- Ability to provide a checklist for tasks
- Ability to import data from other systems (Vendor information, Unit information)
- Ability to set up an automatic distribution of a fully executed contract
- Ability to edit documents in the system
Contract Processing
Future System Requirements

- Ability to provide a functionality to approve and provide a signature via email
- Ability to provide the functionality to integrate documents with edits/redline
- Ability to integrate business rules for approvals/routing tasks
- Ability to provide a robust search (Include example of what this may look like – Search by contract number, search by department)
- Ability to provide a proxy for a role
- Ability to provide email notifications with electronic approval
- Ability to provide mobile access to the applications
- Ability to set up reminders to complete any task within a status
- Ability to easily view the status of a contract
- Ability to upload documents into or relate to a contract
Contract Processing
Future System Requirements

- Ability to mark follow ups, check in with OBFS, Units, and Vendors
- Ability to have the functionality to have a user set up reminders
- Ability to email from the application
- Ability to define task lists
- Ability to setup notification/reminders for a task
- Ability to search on any date field
- Ability to search within a document without compromising system speed and security
Next Steps

- Present feedback to Project’s process Team
- Finalize future state
Contact Information

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Thank you!