Source2Pay Project

Process – Receive Products and Services
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
Receiving Products and Services
Current State Overview

1. Delivery of Product/Service receipt required
2. Observation receipt of good or service
3. Receiving/Acknowledgement
4. Property Tagging
Receiving Products and Services

Current State Identified Issues

- Two different systems two different ways to process
- Not receiving the ‘Receipt Required’ Notification
- Banner Receiving process is cumbersome, and requiring input of information not needed such as shipper information.
- Review reports to know when to receive a product or service in to a system
Receiving Products and Services

Future State Recommendations

Create an online training module for the receiving products and services process, and mandate completion of the training prior to receiving access to the system
Receiving Products and Services

Future State Recommendations

Create online training to insure proper entry of equipment line items and account code when creating a requisition
Receiving Products and Services
Future State Recommendations

Research and determine the feasibility to receive products at a single location at each University
Receiving Products and Services
Future State Recommendations

Redefine the process for ‘Standing Orders’ in the iBuy applications to function the way ‘Standing Orders’ process within the Banner application.
Receive Products and Services

Future System Requirements

- Ability to generate advanced shipping notifications from the vendor on the quantity of items and date they shipped, as well as the whereabouts of items during the process of sending and receiving
- Ability to provide notifications to the requestor (or defined recipient) if items are shorted or shipped back to the vendor
- Ability to support workflow
- Ability to allow users to print information from the system
- Ability to create/generate reports
Receive Products and Services
Future System Requirements

- Ability to provide a user friendly interface which would:
  - Be more intuitive
  - Had a workflow wizard to step the user through the process
  - Contains help buttons with pop ups.
  - Provides a main screen with all necessary action items would appear on so that the work could be delivered to the user

- Ability to receive multiple invoices to handle over tolerance (eliminate the need to override the receiving if multiple invoices on a purchase order with a quantity of ‘1’)

Receive Products and Services
Future System Requirements

- Ability to generate automated notifications when invoices are paid, regardless of thresholds
- Ability to allow users to attach receipts, pictures, and damage claims
- Ability to provide audit trails (email out of the system with the system keeping track)
- Ability to provide on screen “help” comments to assist with issues (avoid calling for an answer)
- Ability to have workflow with customization options for email notifications
- Ability to allow users to designate who should be contacted regarding receiving
- Ability to provide mobile access/app to the applications
- Ability to integrate data with other applications
Next Steps

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