Source2Pay Project

Process – Data Analytics and Metrics

Focus Group Meeting

August 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

- Request for Data
- Identify Parameters
- Identify Tools & Data
- Extract & Scrub Data
- Create Report
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:

### Communications – Issues related to providing information
- Incomplete Data
- Incomplete requests
- Timeliness to run reports
- Multiple names for systems
  - Reports are often duplicated because they are not listed someplace where they can be viewed
- Users don’t know where to look or who to ask about generating reports
- Inconsistent submission of requests
- People in units do not know they can request reports

### Documentation – Issues related to lack of documentation
- Incomplete data
- Lacking documentation (looking for a field that no longer exists)
- Current documentation not updated

### Resources (Financial, Human) – Issues related to lack of sufficient staff or funding
- Users not knowing what systems to use
- Timeliness to run reports
- Users don’t have access to systems
- Users don’t know what to ask for

### Policy/Procedures – Issues related to Policies and Procedures
- Users don’t have the access to certain data tables/technology
### Technology – Issues related to system’s lack of functionality to support the process

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<th>Issue</th>
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<tr>
<td>Incomplete data</td>
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<td>Multiple systems to pull data</td>
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<td>Systems not interfacing</td>
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<td>System downtime</td>
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<td>Lack of tools to request and track reports</td>
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### Training – Issues related to lack of understanding the process

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<td>Users need substantial training time to develop reports</td>
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<td>Inaccurate data</td>
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<td>Users not knowing what systems they have to use</td>
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<td>People don’t know they can request reports</td>
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<td>Complexity of the process and systems used</td>
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<td>Misinterpretation of the data</td>
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<td>There are multiple names of systems that often mean the same thing</td>
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<td>Users don’t have a set of questions to ask when requesting reports</td>
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<td>Users don’t know who to ask</td>
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Recommendations

1. Create list of reports that can be self-generated vs. requested
2. Reduction in the number of systems (Long Term)
3. Centralized reporting resources
4. Publicize the individuals/units that create reports
5. Develop a template and workflow for requesting data/reports
6. Enhance the EDW to include additional data
7. Workflow in new system(s)
Your Input

- What are your recommendations?
Next Steps

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

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Thank YOU!