

3.0 Create a Purchase Requisition Process Report

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Overview

When a University System department has completed their research and identified the need for a good or service, they communicate those requirements into a requisition that conforms to the expectations of University Purchasing. The requisition will be for one of these requisition types: One time purchase, Authority for Restricted/Prohibited Purchase, Unauthorized Purchase (non-conforming), Standing Order, Orders against Master Contracts, and Blanket Orders.

Many University System departments have pre-processes to gather approvals and/or signatures prior to the creation of the requisition. Some University System departments have external systems that generate work orders that must be created first. Others use an internal form to gather and document the necessary approvals required by the University System department. Once those pre-processes are completed, request is given to the person within the department that is authorized to submit requisitions. That person then inputs the requisition into one of the two current requisitioning systems (Banner and iBuy).

Illinois Mandate Symbol - 

University Policy Symbol - 

Professional Mandate Symbol - 

Process Executive Summary

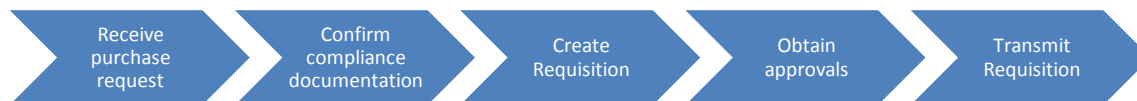
Business Process

This process begins when a University System department has identified a good and or service to be purchased. The vendor may or may not have been determined. One of the following specific situations may need to be addressed in a requisition:

- Restricted/Prohibited purchase verify compliance, and capture authorizations for the purchase
- Unauthorized Purchase process exists to provide and approve payment for a good or service request that is submitted after goods are order or work has started, or after invoice received.
- Standing Orders process exists to establish an existing authorized purchase order against which goods or services can be obtained when needed
- Orders Against Master Contracts exists to execute purchases in an efficient manner
- Blanket Order Process exists to allow for tracking multi-year payments against loans for accounting purposes

The University System department will receive a purchase request, when applicable, obtain interdepartmental approval manually. The University System department Requisitioner confirms compliance documentation has been obtained. Once the information is confirmed, the Requisitioner creates a requisitions in one of the two requisition systems (iBuy or Banner). The requisition system will route the requisition through predefined approval business rules, once the system received the approvals the requisition is completed, considered approved, and transmitted to the next process.

Current Process Activities



Approach

The current state process activities were mapped by the Subject Matter Expert, SME, and the project process team. A SIPOC diagram was created to capture the tasks executed by the department. The SME project team identified opportunities for improvement and brainstormed potential solutions. The current state was presented, issues were identified, and recommendations were discussed at the customer focus group meeting in the University System. The process report was presented to the Source2pay Director Council where they ranked the proposed recommendations for implementation.

Key Findings

The following areas have opportunities for improvement

- Communication
 - 6 issues related were to lack of providing information
- Human/User Error
 - 2 issues related to data being entered incorrectly into the systems
- Multi Systems
 - 5 issues related to having more than one system to process requisitions into
- Process/Procedures

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- 16 issues related to the current process and procedures
- System Limitations
 - 15 issues related to the limitations of the current system applications
- Training
 - 12 issues related to lack of understanding on how to create a purchase requisition

Improvement Recommendations

The process team identified 32 suggested improvements. From the 32 suggested improvements, the team selected 10 improvements to recommend for implementation. The Director Council reviewed the 10 recommendations and ranked the proposed recommendations for Implementation.

Listed are the top four recommended improvements for implementation:

1. Require Users of the requisition system to attend training prior to access being granted to create a requisition.
2. Create a single location to communicate information regarding 'Creating a requisition'.
3. Refine the existing training program on 'Create a requisition' to ensure the attendees have a shared knowledge of the requisition process.
4. Ability to import certified vendor information for diverse vendors into vendor ID in system.

Chapter 1: SIPOC Diagram

Process Name				Date
3.0 Create a Purchase Requisition – Current State				10/13/16
SUPPLIERS	INPUTS	PROCESS	OUTPUTS	CUSTOMERS
<u>Who</u> provides input to the process	<u>What</u> goes into the process	<u>How</u> the inputs are transformed to outputs	<u>What</u> comes out of the process	<u>Who</u> received the outputs of the process
University System departments Vendors (for insurance information, when needed) Grants & Contracts UI Risk Management (for insurance information, when needed) University Payables	Quotes Order Details (price/quantity/C-FOAPAL, other details) Approvals Documentation (Prohibited approval, Restriction approval, Non-Conforming Letter, Special Payment Request Form) Notification of update to Vendor ID	Receive Purchase Request Confirm Compliance Documentation Create Requisition Obtain Approvals Transmit Requisition	Approved Requisition Quotes (as attachments) Approvals Audit Trail	Purchasing

Chapter 2: Suppliers

2.1: University System department

What they care about: Obtaining goods and services in a timely, cost-effective manner

When they care: Whenever the need arises within a University System department

2.2: Vendors

What they care about: Providing goods and/or services, and any required insurance documentation to the University

When they care: When the good/service is requested, and or when insurance documentation is requested

2.3: Grants & Contracts

What they care about: Ensuring monies are spent only towards items allowed per the grant contract that provided the funds.

When they care: Anytime grants funds are used for the purchase of goods or service

2.4: UI Risk Management

What they care about: Managing risk for expenditures

When they care: Anytime insurance is needed for an expenditure and it is determined that Vendor is not supplying the insurance certification

2.5: University Payables

What they care about: Vendor information is accurate and current

When they care: Anytime a vendor is needed to conduct business with the University

Business Rules

Insurance certification is sometimes required for certain purchases. This can be provided by the Vendor or UI Risk Management, depending on the type of purchase. 

Purchase through a vendor certified in the Business Enterprise Program is preferred when all else is equal 

Chapter 3: Inputs

3.1: Quotes

Vendors that may be able to provide the goods or service are contacted by the University System department and specifications and pricing are requested.

3.2: Order Details

Once the Vendor is selected, the University System department creates a request for that good or service, and includes the following specifications

- Accounting data (C-FOAPAL)
- Delivery date
- Delivery terms
- Department information
- Departmental reference and tracking IDs (references to external systems)
- Document comments (Special Instructions)
- Hospital delivery location
- Item comments
- Item description
- Number of units
- Payment terms
- Pricing per unit
- Requestor contact information
- Service start and end date
- Ship to address
- Shipping terms
- Vendor address
- Vendor ID
- Vendor name

3.3: Approvals

Many University System departments have a pre-approval process prior to the creation of a Requisition. These are handled either manually or through external systems, and should happen prior to the requisition being created.

3.4: Documentation

Supporting documentation should be added to the requisition or sent to Purchasing for attachment to the purchase order that will be created based on the requisition. Supporting documentation includes but not limited to the following:

- Certifications of Insurance
- Non-conforming Letter
- Prohibited approval
- Restriction approval
- Special Payment Request form

Business Rules

University policy 7.2 for purchases 

Chapter 4: Process

4.1: Receive Purchase Request

A University System department initiates the process to request the acquisition of a good or service, and determines and obtains any pre-approval that the University System department may utilize.

4.2: Confirm Compliance Documentation

The authorized person within the University System who has permissions to create requisitions within the University requisitioning systems receives a request from someone within their department for the acquisition of a good or service. The authorized person reviews the request to confirm the request is not prohibited, and/or contains any restrictions, the vendor's terms and conditions requires a Special Payment Request, and/or Non-conforming Letter.

4.3: Create Requisition

The authorized person within the University System who has permissions to create requisitions within the University requisitioning systems receives a request from someone within their department for the acquisition of a good or service. The authorized person then makes a determination of the characteristics of the request, and verifies it meets criteria for one of the requisition types. These include:

- One-time purchase
- Unauthorized Purchase (non-conforming)
- Standing Order
- Orders against Master Contracts
- Blanket Orders
- System used is determined by campus and by Payment Terms
 - UIC
 - If Payment Terms= "Net 30" then iBuy must be used
 - If Payment Terms are not "Net 30" then Banner must be used
 - UIUC or UIS, University System department can decide to use either Banner or iBuy
- Both processes have many similarities
 - Each requires the University System department to enter order details as seen in section [3.2](#)
 - Each requires the University System department to provide the quotes obtained, if any
 - iBuy-attached directly to requisition
 - Banner-Faxed/emailed to Purchasing to be attached to purchase order
- Key differences
 - iBuy offers Catalogs for purchasing items from a certain awarded Vendors with University negotiated pricing
 - iBuy allows University System departments to attach documents directly to the requisition.

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- iBuy provides email notifications when various steps of the workflow are completed.
- If <\$5,000, potential for the University purchase order to immediately be generated and transmitted once the iBuy requisition is approved by the University System department.

4.4: Obtain Approvals

- Each requisitioning system (Banner, iBuy) offers approval queues through which each requisition is evaluated and automatically routed through necessary approvers within the organizational code, Org Code.
 - Approvals can be driven by different criteria:
 - Dollar thresholds
 - Use of grant funds
 - Type of item purchased

4.5: Transmit Requisition

- Once all approvals are obtained, the system forwards the Requisition to Purchasing.

Business Rules

- On the UIC Campus, all purchases that have terms equal to “Net 30” must go through the iBuy system. 📄
- Approval processes 📄
 - Approvals can be based on the following criteria:
 - Type of monies spent (grant funds, state funds, etc.) 📄
 - Type of goods or service being acquired (i.e. controlled substances, furniture, etc.) 📄
 - Dollars spent
 - Each University System department can specify different levels of approval required
 - These levels are not necessarily consistent between University System department
 - i.e. University System department “A” may require director-level approval at \$5,000+, while University System department “B” may not require director-level approval until \$25,000+
- Quotes
 - Any quotes obtained are to be saved and attached to the requisition (iBuy) or emailed to the Purchasing department referenced on the requisitions and purchase order (Banner). 📄
 - University policy 7.2 for purchases 📄

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- The order to select a vendor from most preferred to least-preferred is the following:
 - Awarded Vendor that has a catalog in iBuy
 - Awarded Vendor that does not have a catalog in iBuy
 - Non-awarded Vendor that is already configured in Banner/iBuy
 - Non-awarded Vendor that is not already configured in Banner/iBuy

University System departments are encouraged to use diverse vendors in these categories when possible.

This does not take into account other considerations such as purchases from BEP vendors, pricing, availability, etc. 

- Insurance certifications are required for certain types of goods or services to ensure risk management 
- All information on the requisition needs to be accurate prior to finalization.

Chapter 5: Outputs

5.1: Approved Requisition

All approvals have been obtained, and the requisition is ready to be transmitted

5.2: Quotes (as attachments)

All quotes obtained are attached to the requisition, or are available for attachment to the purchase order that will be issued

Note: As quotes cannot be electronically attached to a Banner requisition or a Banner purchase order the quote(s) are emailed to the Purchasing department to be referenced and put into the Banner Document Management system.

5.3: Approvals Audit Trail

Requisitioning systems (Banner, iBuy) have audit history available for all the various approvals that a specific requisition obtained.

Business Rules

None

Chapter 6: Customers

6.1: Purchasing

What they want: Completed requisition that includes all necessary details and approvals

Business Rules

None

Chapter 7: Customer - Oversight Roles

[Describe what oversight is needed (e.g. Funders, OBFS, Auditors, Board of Trustees BOT, Legislature, Public)]

7.1: Environmental Safety

What they want: Compliance with all Federal and State laws and University mandates and policies regarding items potentially harmful to the environment

7.2: Central Management Services

What they want: Compliance with State laws and regulations regarding diversity spending.

Business Rules

None

Chapter 8: Questionnaire for Current State Analysis

1. Why does the process exist?

The overall process exists to allow University System departments to obtain goods and services to provide and conduct teaching, business, and operations of the University System while maintaining compliance with all Federal, State and University policies and procedures.

There are specific situations that need to be considered when obtaining a good or service. A request to purchase can contain one or more of the following unique situations:

- Restricted/Prohibited purchases exists to comply with Federal, state and University policy
 - Confirm permits to handle special commodities
 - Mitigate risk with certificates of insurance and/or financial disclosures
- Unauthorized Purchase (non-conforming) process exists to account for goods and services obtained when proper purchasing sequence/policies were not followed
- Standing order process exist to allow for anticipated and unanticipated needs for a good or service for which the specific date or quantity is not known throughout the fiscal year.
- Orders Against Master Contracts exists to provide ability to purchase good or service against an awarded or executed contract
- Blanket Order process exists to track multi-year payments against loans for accounting purposes

2. What is the purpose of the process?

The overall process is to acquire goods and services in a timely manner in accordance with Federal, State and University policy with appropriate documentation and approvals.

One or more of the following unique situations may be addressed in a requisition:

- Restricted/Prohibited purchase verify compliance, and capture authorizations for the purchase
- Unauthorized Purchase process exists to provide and approve payment for a good or service request that is submitted after goods are order or work has started, or after invoice received.
- Standing Orders process exists to establish an existing authorized purchase order against which goods or services can be obtained when needed
- Orders Against Master Contracts exists to execute purchases in an efficient manner
- Blanket Order Process exists to allow for tracking multi-year payments against loans for accounting purposes

3. What are the process boundaries (i.e., when does it start and end?)

Start: Vendor identified for purchase of a supply/service

End: Completed/Approved Requisition Transmitted

4. What are the major activities/steps in the process?

See [Chapter 4: Process](#) (Ctrl-click to follow links)

5. What is the expected outcome or output of the process?

See [Chapter 5: Outputs](#) (Ctrl-click to follow links)

6. Who uses the output of the process, and why?

See [Chapter 6: Customers](#) (Ctrl-click to follow links)

7. Who benefits from the process, and how?

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- University System departments benefit by successfully obtaining their needed good or service
 - Purchasing benefits when complete/accurate information is submitted in a requisition and quotes and attachments are provided to the Purchasing department
 - Payables benefits from accurate payment information
- 8. What information is necessary for the process?**
See [Chapter 3: Inputs](#) (Ctrl-click to follow links)
- 9. Where does that information come from?**
See [Chapter 2: Suppliers](#) (Ctrl-click to follow links)
- 10. What effect does that information have on the process and output?**
It provides the information needed to create a purchase order for a good or service
- 11. Who is primarily responsible for the process?**
Requisitions are generated by authorized staff within University System departments
- 12. What other units/organizations participate in or support the process?**
- 13. What Information Technology system(s) support the process?**
- Banner
 - Banner Document Management
 - Exchange
 - iBuy
 - Microsoft Outlook
 - RightFax
- 14. What policies guide or constrain the process?**
- Grants/contracts that govern how funds are spent
 - Illinois Procurement Code and related Higher Education procurement rules
 - University policies related to restricted/prohibited purchases
- 15. How often does the process get executed?**
Multiple times per day
- 16. What are potential defects with respect to the process?**
- Inaccurate/incorrect information can lead to the creation of a purchase order that does not accurately reflect the University's need or is unable to be paid without a change order.
 - Non-uniform way of placing requisitions at all campuses.
 - Insufficient controls to monitor for compliance with regulatory and University policy requirements
- How often do they occur?**
Frequently
- 17. What types of challenges have employees who participate in the process raised?**
- University System users have a hard time knowing what vendors have pre-approved contracts for certain items
 - Lack of complete/accurate information on requisitions
 - Purchasing website does not encompass all up to date rules regarding purchasing

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- a. "Types of purchases" section does not encompass every single purchase and or illustrate every scenario
- Multiple systems result in confusion of University System departments as to where to start.
 - a. iBuy -vs- Banner
- How to see where a requisition is in the workflow (who it is with, what step in the process, etc.) varies by system
- When changes are made to a requisition once received by purchasing are not always communicated back to the originator

18. What types of challenges or concerns have customers raised?

- Purchasing-University System Users are offered training but don't always attend prior to being granted authority to create a requisition
- Purchasing-Need to support/maintain multiple systems
- Purchasing- Multiple points of entry with work flowing in
- University System departments units – Challenge of utilizing multiple systems
- Determining where a requisition is in the workflow (who it is with, what step in the process, etc.)
- Depending on the requisitioning system, updates about requisitions are not always communicated back to the originator

19. Will the process be changed by another initiative in the near future?

- Federal and State mandates can impact the process
- University policy changes can impact the process.
- Changes to system applications used to perform the process
 - Banner XE upgrade
 - Upgrades to the current iBuy system
 - Potential new ERP system will have a significant impact to the entire process.

Chapter 9: Questionnaire for Potential Process Improvement Candidates

1. How would the process operate differently in the “Perfect Situation?”

- All purchasing done in one system
 - Ability to interface to other systems, such as contract system
 - Ability to make the system work differently based on the University on which it is being used (UIC, UIS, UIUC)
- Visibility of workflow and where the process resides
- Email notification when status changes
- Purchasing restrictions and other policy limitations would be reflected in the system
 - End user has to go to OBFS website to determine prohibited items, the system should alert user if attempting to purchase
- Allow for ad-hoc approval routing prior to the system approvals
- Customizable approval paths
- Ability to attach all required documentation to the requisition
 - Predefined forms for all required documents
- Provide information for departments that define the system requirements for integrations into the system
- Access to historical information regarding vendor disclosures that other departments may have already obtained
- Ensure that customers still have the ability to complete their requisitions and the system doesn't have constraints that it increase the workload on the customer

What does the team hope to achieve through this improvement?

- Reduction of time spent creating requisitions
 - Improved efficiencies
 - Fewer mouse clicks
 - Fewer people involved
 - Streamline process
 - Improved staff attitudes

Who would benefit from the desired improvement to the process?

- University Departments
 - Students
 - Faculty
 - Staff
- Vendors
- Anyone that touches a requisition

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a. How would we know?

- Feedback from University Units
- Less time spent in receiving goods or services
- Reduction in non-conforming requisitions
- Analysis of time spent
- Fewer Service desk tickets
 - Facilities
 - AITS
 - BSS

What data can be provided with respect to the process performance (e.g. service rating, cycle time, customer survey responses, etc.)?

- Time spent in process of requisition to purchase order process
- Surveys
- Measure quantity of call prior to and after implementation

2. Who should be included in any improvement discussions for the process?

- High-volume units
 - IT department of those areas
- Unique department units
 - Library
 - Facilities (Utilities)
 - Medical facilities
- Smaller department units who have smaller number of staff
- Purchasing
- Payables

Chapter 10: Current State Metrics

Metrics in three areas is being collected on each process. These metrics will be used to measure success in the future state.

- **How long does the process take from Start to finish?**

The length of time it take to create a purchase requisition depends on many elements including the date of the quote (quotes expire after 30 days), if the vendor is setup in Banner and/or iBuy, if an external requisition system is being used.

If all documentations is present and vendor is known the direct entry into one of the two requisition applications can take 10 minutes to 1 hour.

If the documentation needs to be obtained or created or the vendor is unknown, the process can take 1 day to 6 months, or even longer.

- **How many touchpoints are there per process?**

The number of touchpoints can vary depending on the number of line items on a requisition and the number of attachments included on a requisition.

- **How many steps are involved in each process?**

The Create Purchase Requisition has 90 steps involved.

Chapter 11: Feedback from Customer Focus Groups – Current State

The Current State process was presented to each University's Customer Focus Group on October 18-20. A total of 26 attended with 7 participants from UIC, 2 people from UIS, and 17 people from UIUC.

Campus Focus Group Summary

- Nothing new was noted in the sessions that we had not heard in previous sessions from a process standpoint, so all processes had been accurately conveyed from the SME team.
- Majority of the feedback focused on confusion and lack of training for the requisition process, and have also been noted in other processes.

Campus Focus Group Report

Issues:

Overall

- Inconsistencies between departments
 - Between Purchasing and Payables
 - Ex: What is the acceptable variance for shipping charges
 - Between Purchasing Buyers
 - Buyer "A" says yes and Buyer "B" says no
- iBuy the preferred requisition method over Banner
 - Punchouts don't list out of stock when submitting the Requisition, why?
 - Can easily see status in iBuy but not in Banner
 - How do you process an emergency without a proper vendor maintenance form
 - Vendor information sometimes has to be updated due to being out of date, but we have no way to know when we select the Vendor to request that update.
- Delays when the Vendor isn't in Banner or iBuy due to need for Vendor to return Vendor Maintenance Form.

Banner

- If we copy a Requisition to save time, the notification goes to the wrong person, unless you were the person that created the original
- Document text in Banner is bad since you have to page down
- Events are very difficult to process in Banner due to the requirement that the PO exists prior to payment, but many locations want payment when venue is initially booked.

iBuy

- Users have no idea why a requisition has been rejected in iBuy - purchasing doesn't enter a reason, have to go into iBuy and see notes on PO
- Commodity codes in iBuy are worthless for hospital - can search in iBuy, but in Banner it's difficult
- Can't do special payments in iBuy

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Training

- Insufficient resources
 - OBFS website a “black hole”
 - Sometimes know the information is there as have found it previously, but cannot replicate the steps I used to find it previously
 - Which system to use
 - What rules govern that type of purchase
 - Which Vendors are contracted
 - Users not trained on what needs to be line items vs. just attached a quote
 - Job Aids missing a step, or don't fully explain the “why” behind the reason for selecting a field, or explain the repercussions if it is done incorrectly
 - Instructions sometimes written in hard-to-understand language
 - (We asked for specifics so that we can address.)
- Strong desire to have a specific person to call within University Purchasing for assistance instead of going into an email queue

Recommendations:

- A “wiki” or Wizard to guide us as to which system to use/which Vendor to use based on the requisition
- Improvements on the time between Vendor form versus having it in the system
- Nice to see the status of a Requisition in Banner, have it in iBuy
- Notifications of approvals or delays in Banner, rather than having to go into the system and hunt for it
- Ability to list two people as Contact info if Purchasing or Payables has questions
- Notification in Banner of tasks on which to act
- Be able to issue a requisition without a vendor maintenance form being issued - this can happen now but it's not very clear. Would be helpful for Emergency requisitions if using a new vendor
- Ability to copy/paste in Banner, have to re-enter the vendor terms into Banner.
- In iBuy at the final review, you push send, you have to ask your approver to send it back to you to correct (retrieve it) or at least a message before you submit "are you sure"
- Would like to see if there are attachments and some internal notes when using the mobile interface
- Be able to do special payments all in iBuy

Out of scope

- Update vendor maintenance (be helpful if the vendor maintenance part was part of the requisition - instead of fax) and be notified when the vendor has been updated
- Notification when a Vendor is updated
- Ability to know when we select a Vendor that the Vendor info is out of date.

Chapter 12: Opportunities for Improvements

The following opportunities for improvement were identified through team discussions, with Customer Focus Groups, Director Council, and the process project SME team. Issues were categorized into six categories, covering Communications, Human/User Error, Multi-Systems, Process/Procedures, System Limitation, and Training.

Communication – Issues related to providing information

C1.1	Purchasing website does not encompass all up-to-date rules regarding purchasing (type of purchase sections does not encompass every single purchase and or illustrate every scenario)
C1.2	How to see where a requisition is in the workflow (Who it is with, what step in the process) varies by system
C1.3	When changes are made to requisitions once received by purchasing are not always communicated back to the originator
C1.4	Depending on the requisition system, updates about the requisition are not always communicated back to the originator
C1.5	Receiving conflicting information from procurement services when entering specific information on a requisition
C1.6	Unable to contact a specific person directly when calling University Purchasing for assistance instead of going into an email queue

Human/User Error – Issues related to data entered into the systems

C2.1	Receiving conflicting information from purchasing buyers when entering specific information on a requisition
C2.2	Data Entry Errors from quote to requisition

Multi Systems– Issues related to having more than one system to process requisitions

C3.1	Non-uniform way of placing a requisition at all Universities
C3.2	Multiple systems result in confusion of University System departments as to where to start (iBuy vs Banner)
C3.3	Purchasing - Needs to support/maintain multiple systems
C3.4	Purchasing - - Multiple point of entry with work flowing in
C3.5	University System departments - Challenge of utilizing multiple systems

Process/Procedures – Issues related to current process and procedures

C4.1	Non-uniform way of placing a requisition at all Universities
C4.2	Purchasing website does not encompass all up-to-date rules regarding purchasing (types of purchases section does not encompass every single purchase and or illustrate every scenario)

3.0 Create a Purchase Requisition

Process/Procedures – Issues related to current process and procedures	
C4.3	How to see where a requisition is in the workflow (who it is with, what step in the process) varies by system
C4.4	Receiving conflicting information from purchasing buyers when entering specific information on a requisition
C4.5	Delays when the vendor isn't in Banner or iBuy due to need for Vendor to return Vendor Maintenance Form
C4.6	When copying a requisition in Banner to save time, the notification goes to the wrong person, unless you were the person that created the original
C4.7	Events are very difficult to process in Banner due to the requirement that the PO must exist prior to payment, but many locations want payment when venue is initially booked
C4.8	Users have no idea why a requisition has been rejected in iBuy, purchasing doesn't enter a reason, have to go into iBuy to see notes on PO
C4.9	Can't do special payment requests in iBuy
C4.10	Unable to contact a specific person directly when calling University Purchasing for assistance instead of going into an email queue
C4.11	Too many exceptions
C4.12	Too many outside steps/forms
C4.13	Too many non-conforming requisitions
C4.14	Over tolerance issues
C4.15	No overage tolerance i.e. meals, reception requirements, change order which result in delay of payment to vendors
C4.16	Service call quote may depend on needs once vendor is on site

System Limitation –Issues related to the limitation of the current system applications	
C5.1	Insufficient controls to monitor for compliance with regulatory and University policy requirements
C5.2	University System users have a hard time knowing what vendor(s) have pre-approved contracts for certain items
C5.3	How to see where a requisition is in the workflow (who it is with, what step in the process) varies by system
C5.4	Document text in Banner is bad since you have to page down
C5.5	Users have no idea why a requisition has been rejected in iBuy, purchasing doesn't enter a reason, have to go into iBuy to see notes on PO
C5.6	Commodity codes in iBuy aren't useful for the Hospital
C5.7	Commodity codes search in iBuy, but difficult in Banner
C5.8	Cannot edit specific areas of requisition once approved
C5.9	These are integrations issues between Banner and iBuy
C5.10	Requisitioning system does not interface with other purchasing systems

3.0 Create a Purchase Requisition

System Limitation –Issues related to the limitation of the current system applications	
C5.11	Inability to process requisitions with non-net 30 payment terms in iBuy
C5.12	no easy/standard electronic upload/download definitions or ability to do so
C5.13	Not being able to retrieve requisitions
C5.14	status of contract/service agreements
C5.15	How do you identify what vendors supply in Banner & iBuy
C5.16	Difficult to identify diverse vendors in requisition system(s)

Training – Issue related to lack of understanding on how to create a purchase requisition	
C6.1	Lack of complete/accurate information on a requisition
C6.2	University System users have a hard time knowing what vendor(s) have pre-approved contracts for certain items
C6.3	How to see where a requisition is in the workflow (who it is with, what step in the process) varies by system
C6.4	When changes are made to a requisition once received by purchasing are not always communicated back to the originator
C6.5	Purchasing-University System Users are offered training but don't always attend prior to being granted authority to create a requisition
C6.6	Depending on the requisition system, updates about the requisition are not always communicated back to the originator
C6.7	Receiving conflicting information from purchasing buyers when entering specific information on a requisition
C6.8	When copying a requisition in Banner to save time, the notification goes to the wrong person, unless you were the person that created the original
C6.9	Users have no idea why a requisition has been rejected in iBuy, purchasing doesn't enter a reason, have to go into iBuy to see notes on PO
C6.10	Job Aides incomplete, missing steps, doesn't explain the 'why' behind the reason to select a field or input information, written hard to understand
C6.11	Ability to see who requisition is assigned to
C6.12	Too many non-conforming requisitions

Chapter 13: Suggested Improvements

The following recommendations came from discussion with the process team, the project Director Council, and customer focus group sessions. Not all improvements were selected by the process team. The selected improvements, in bold, were presented to the customer focus groups for feedback, and are recommended for review by the Director Council. (Further discussed in [Chapter 15: Recommendations for Improvements](#))

Number	Change Category	Suggested Improvement
1	Communications	Communications – Tracking, email status
2	Communications	Purchasing commodity list by buyers
3	Human/User Error	Go back to commodity purchasing
4	Multi-System	Single requisition system
5	Process/Procedures	Vendor maintenance online update and request for vendors
6	Process/Procedures	Update Purchasing website, revamp OBFS Purchasing website to be more complete and up-to-date
7	Process/Procedures	Impose a penalty on non-conforming orders
8	Process/Procedures	Consistent processes and procedures, shared and understood by all
9	Process/Procedures	Train on proper purchasing sequence
10	Process/Procedures	Standardize forms, electronic
11	Training	Restructure training, include webinars
12	Training	Require Training
13	Training	Offer refresher iBuy/Banner training on specific topics
14	Training	Update Job Aids
15	Training	Promo and communicate availability of training resources and add more resources for training
16	System Limitation	Work with existing system vendors to implement enhancements
17	System Limitation	Ability to import certified vendor information for diverse vendors into vendor ID in system
18	System Limitation	System Interface with all University Systems
19	System Limitation	Enhance current system(s) or replace, iBuy is more user friendly and probably more flexible – enhance iBuy
20	System Limitation	Ability to access documents, past sole source RFPs, contracts, etc.
21	System Limitation	Allow special payment requests in one system
22	System Limitation	Training and Communications on identifying diverse vendors
23	System Limitation	Have a diverse vendor filter
24	System Limitation	Commodity code search (similar to Account Code Search)
25	System Limitation	Maintain a commodity code search (i.e. State of WI has a NIGP code search)
26	System Limitation	Single up-to-date location to find existing contracts
27	System Limitation	Have a category filter i.e. commodity service by vendor
28	System Limitation	Update purchasing website with current contracts that we can purchase from and other consortiums, i.e. IPHEC
29	System Limitation	Ease of data input and export from shadow systems
30	System Limitation	Ability to retrieve your requisition if still in the working queue (iBuy and Banner)
31	System Limitation	Allow Change orders on requisitions
32	System Limitation	Ability to track contracts and service agreements

Chapter 14: Feedback from Customer Focus Groups – Future State

The Future State process and recommendations were presented to each University's Customer Focus Group December 6 – 8, 2016. A total of 24 people attended with 6 people in attendance from UIC, 3 people from UIS, and 15 people from UIUC.

Campus Focus Group Summary

The Customer Focus Group received an overview of the current state for the process Create a Purchase Requisition. The issues within the current process that were identified by the SME project team, the Director Council, and the Customer Focus Groups on the current state were reviewed. The ten recommendations from the SME team were presented, after each recommendation was presented the group had a discussion. The groups provided suggestion they would like be included within some of the recommendations details. Not all recommendations received suggestions, the group agreed with the recommendation as it was presented.

Campus Focus Group Report

Recommendations

Reduce Non-conforming purchase orders

- Focus must be on training and consistent training
- Ability to note when different funds could be used
- What is considered non-conforming need to be more clear
- Develop examples of what is non-conforming
- Review current non-conforming purchase orders and determine what is common and what needs to change to make the process work

Develop Consistencies in procedures

- "Spot On!" This is needed

Refine existing training programs on create a requisition

- Make this online training
- Would recommend searching and shopper training and also basic knowledge of the process
- Recommend certifications and a quick test
- NOT a big fan, concerns when training is available to when someone needs access into the system.
- Recommend temporary access and give a timing option to complete training by, if not remove access.
- Recommend a user group to swap tips and tricks
- Training and understanding should be required for all helpdesk staff to assist customers
- Some people need one-on-one training
- Training include some hands on exercises

New System to support the Create a Purchase Order functionality

- Really would like the ability for a vendor to send an e-quote

3.0 Create a Purchase Requisition

- More graphical interface
- Ability to copy and paste
- Ability to wrap text
- Ability to add attachments the flow through the system onto the purchase order
- Provide system help like using a '?' or popups
- Ability to cancel a requisition/purchase order or retract it

Chapter 15: Recommendations for Improvements

Within the process 'Create a Purchase Requisition', ten recommendations have been identified for improvement. five different categories were identified for the improvements, and each improvement received a level of implementation. The categories include communications, multi-systems, process/procedures, system limitations, and training. There are two levels of implementation: "short-term" indicates improvements suggested for the current system and process prior to the development of an RFP, and "long-term" indicates improvement to the process with an RFP for a new system. The recommendations are in order to make the create a purchase requisitions process better, help the users understand the process, and make sure the process works.

Num ber	Describe Potential Solutions	Category	Impleme ntation Level	Related Issue(s)
1	Create a solution to communicate the status of where a requisition is within the process. We are recommending to create a working group with representation from Procurement Services (Purchasing from each University) University System departments, and OBFS – Business Solutions & Support (iBuy production support), to create a solution to address the communication of the status of where a requisition is within the process. The working group would be charge to: - Review the current functionality of both requisitioning systems (iBuy and Banner) - Review current documentation of each system for accuracy, update if needed - Determine best method to communicate documented functionality to the University System departments, create implementation plan, and execute plan. - Method to communicate using existing functionality with each requisitioning system - Review current procedures when Purchasing department responds to inquiries and train staff to insure consist methods are being followed As a result of communicating the current documented functionality of both requisitioning system, the University System's employees will be provided with: - Knowledge of the status of a submitted requisition within the requisitioning system - Reduction in calls for daily support for University System department and unit supporting the inquiry	Communication	Short	C1.1, C1.4, C4.3, C4.8, C5.3, C6.3, C6.4, C6.11

3.0 Create a Purchase Requisition

Num ber	Describe Potential Solutions	Category	Impleme ntation Level	Related Issue(s)
2	Develop a functionality to alert a user when a vendor's information needs to be reviewed and updated with current information. We are recommending a new application has the ability to alert a user, based on a determine time interval, updated vendor information needs to be obtained from the vendor. Example: University System department reviews a vendor and their listing of goods and services available for selection. The system displays a notification letting the user know to request current information from the vendor prior to proceeding to conducting business with selected vendor. <i>Note: Update this recommendations with the Vendor Maintenance and Update process.</i> The functionality will help the University System departments know the vendor information is current and will remove any delays in submitting a purchase requisition for goods and/or services. <i>Director Council</i> <i>Include as a requirement in the future system.</i>	Process/ Procedure	Long	C4.5
3	Create a single location to communicate information regarding 'Creating a requisition'. The communication will provide authorized users with information needed to prepare and complete a requisition. A working group should be formed to formalize what will be communicated, including: • Awarded vendors • Vendors by commodity • Commodities by vendors • Type of Vendor (BEP certification, minorities, females, person with disabilities, small business, Veterans, facilities for persons with disabilities, Illinois Correctional Industries, and IPHEC) • Regulations/Rules/Policies/ ○ Changed in State Procurement Code ○ Changed in University policies • Requirements for creating a requisition • Matrix regarding ○ Type of options are available to use to make a purchase ○ When to make a purchase ○ Method to purchase with	Process/ Procedure	Short	C1.1, C1.5, C2.1, C4.2, C4.4, C6.1, C6.7, C6.10

3.0 Create a Purchase Requisition

Num ber	Describe Potential Solutions	Category	Impleme ntation Level	Related Issue(s)
	• Training time and location • Known system outages The recommended working group should include members from: • OBFS – Business Solutions and Support • OBFS – Procurement Services departments • AITS • University System departments			
4	Determine ways to reduce non-conforming purchase orders. We are recommending OBFS Leadership support this recommendation to create a committee to evaluate ways to reduce non-conforming purchase orders. The committee would make recommendations to address compliance with policy to help eliminate non-conforming purchase orders, as well as exception criteria that would allow for emergency situations. The working group will be charge to: • Develop and evaluate metrics for current non-conforming purchase orders. The metrics would include: ○ Number of non-conforming ▪ University, Department ○ Causes for non-conforming purchase orders • Develop recommendation to reduce non-conforming purchase order ○ Training University employees, not only staff to research to purchase or creating a requisition ○ Research State procurement when a purchase is over the bid limit and the purchase requisition is non-conforming ○ Define what is considered to be non-conforming, which examples The recommended committee would include: • Non-compliant University System departments • Compliant University System departments • Procurement Services (Purchasing – all three Universities, Payables) As a result of reducing non-conforming purchase orders the following would be achieved:	Process/ Procedure	Short	C4.7, C4.9, C4.11, C4.13, C6.12

3.0 Create a Purchase Requisition

Num ber	Describe Potential Solutions	Category	Impleme ntation Level	Related Issue(s)
	- Compliance with Procurement Code - Vendors paid timely - Reduction in rework by University System departments and the Procurement Services departments <i>Director Council:</i> <i>Involve the colleges to determine the best way to educating faculty and staff.</i>			
5	Develop consistencies in the procedures and provide a shared understanding by all users. We are recommending a working group be created to review procedures to incorporate the following: - Examples to illustrate the requirements in for using both current requisitioning system (iBuy and Banner) - Examples of conforming and non-conforming purchase requisitions - Examples relevant to all Universities - Create a standard format that will provide consistency We recommend the working group have representation from: - University System departments - Procurement Services (Purchasing and Payables - OBFS – Business Solutions & Support – Training and instructional design group As a result, the University System departments will have consistency in the procedures with a shared understanding of the process to help eliminate further conversations on how to submit a purchase requisition.	Process/ Procedure	Short	C1.1, C1.5, C2.1, C4.2, C4.4, C6.1, C6.7, C6.10
6	Refine the existing training program on ‘Create a requisition’ to ensure the attendees have a shared knowledge of the requisition process. We are recommending a working group be created, with representation from OBFS – Business Solutions and Support, OBFS Procurements Services and University System departments units. The working group will be charged to: - Define the types of role(s) required to obtain training - Staff submitting a requisition - Approvers of a requisition - Procurement Services – Purchasing - Helpdesk staff to assist customers - Incorporate training on the vendors of Business Enterprise Program, (BEP certification, minorities, females, person with disabilities, small business,	Training	Short	C1.5, C4.2, C4.4, C6.1, C6.2, C6.5, C6.7, C6.9, C6.10, C6.12

3.0 Create a Purchase Requisition

Num ber	Describe Potential Solutions	Category	Impleme ntation Level	Related Issue(s)
	Veterans, facilities for persons with disabilities, and Illinois Correctional Industries) and how to identify them in the requisitioning systems (iBuy and Banner). • Develop a self-guided Online training program with certification ○ Provides ability for end user to schedule the training ○ Include hands on exercises to create a purchase requisition • Develop an Instructor led training program with certification ○ Provides ability for end user to receive one-on-one consistent training ○ Include hands on exercises to create a purchase requisition • Develop an 'Open Lab' program to allow user to bring in real-time issues with questions • Develop a User Group for each University with representation from Procurement Service ○ Allow user who perform the job tasks an opportunity to learn tips and trick. • Define the continuous training with certification on a set interval. Once an attendee is certified, recommend renewing certification bi-annually. As a result of the training, the attendees will have shared knowledge of • How to submit a requisition in the system and the system's features • Awarded vendors • BEP Vendors • Policies on buying goods and services for the University • How to obtain current information about creating a requisition for the University			
7	Require Users of the requisition system to attend training prior to access being granted to create a requisition. Utilize the refined training project, recommendation number 6, for the User to obtain the knowledge on how to create a requisition and related policies prior to access being granted to the requisition system. We requesting OBFS leadership support this recommendation, and create a committee to formalize the policy and include: • Create a test for certifications	Training	Short	C1.5, C4.2, C4.4, C6.1, C6.2, C6.5, C6.7, C6.9, C6.10, C6.12

3.0 Create a Purchase Requisition

Num ber	Describe Potential Solutions	Category	Impleme ntation Level	Related Issue(s)
	○ Determine the acceptable grading scale to achieve certification ○ If certifications is not obtained, allow requirements to retake test. ○ Allow for process to be repeatable after a set date interval for renewal of certification ● Recommendations on quick time frame once certifications is obtained to when access is granted ● Guidance on how to handle Users who currently have access to the system ● How to address continued training once the access has been granted ● Include functionality, once certification is obtained communicate a request to grant access to system(s) As a result of the certification training of creating a purchase requisition, the University employee will be provided with: ○ Consistent training at all University System departments ○ Knowledge and a shared understanding of policies and procedures regarding purchase requisitions ○ Less mistakes when submitting a requisition request to purchase a good and/or service resulting is less corrections ○ Receiving the good and/or service timely			
8	Work with existing system vendors to enhance capabilities until a new system can be implemented. We are recommending to reconvene the iBuy Improvement Enhancement team, and include AITS, and University System departments. This group will further define the system requirements for the following recommended system enhancements in the iBuy and/or Banner applications, and review any need enhancements related to iCS. ● <i>iBuy needs to be able to pass the PO Term field data into Banner.</i> Currently when the data exports from iBuy, the value is 'Null'. This results in need for UPayables to manually update each invoice to contain the value of Net30 in Banner. The iBuy application need to be able to add a value in the PO Term field. ● <i>Shipping Term</i> – The iBuy application needs a field to add the Shipping Terms, and include the value in the export values to be imported into the Banner application.	System Limitation	Short	C5.11

3.0 Create a Purchase Requisition

Num ber	Describe Potential Solutions	Category	Impleme ntation Level	Related Issue(s)
	<i>Standing orders</i> – Enhance the standing order process in iBuy to interface into Banner. <i>Change Orders</i> – Enhance the iBuy system to pass the PO terms and shipping information to updates changes into Banner. <i>Allow iBuy to have the ability to accept e-Quotes that flow into the non-catalog order process.</i>			
9	Ability to import certified vendor information for diverse vendors into vendor ID in system. This is a current project to import diverse vendors into the requisitioning system, iBuy. The results of the import will be communicated to each University from the Procurement Diversity department. We recommend a working group representing AITS, OBFS – Business Solutions & Support, Procurement Diversity Office, and Procurement Services (Strategic Procurement, and Payable (Vendor Maintenance team) be charged with determine how to implement importing certified vendor information for diverse vendors into the process flow into the other requisitioning system Banner. Note: Team members acknowledges using diverse vendors is an important topic.	System Limitations	Short	C5.16
10	A new Source to Pay application should have ability to support the functionality of creating a requisition. The benefits include: - Departments will have one system in which to work - Maintain and support one system - One system in which to train - One system from which to report - Improve processing time - Consistency of procedures The functionality should include: - Ability to have a workflow within the entire system to see the status the requisition is in during the process - Provide APIs to interface with systems - Provides a user friendly visual application - Ability to generate reports on the data within a requisition - Ability to access historical information	Multi System	Long	C1.2C C1.3, C3.1, C3.2, C3.3, C3.4, C3.5, C4.1, C4.3, C4.5, C4.6, C4.8, C4.9, C5.1, C5.2, C5.3, C5.5, C5.6, C5.7, C5.8, C5.9, C5.10, C5.11, C5.12, C5.13, C5.14, C5.15, C5.16

3.0 Create a Purchase Requisition

Num ber	Describe Potential Solutions	Category	Impleme ntation Level	Related Issue(s)
	• Ability to access documents, previous Sole Source RFPs, Contracts, vendor quotes, and other documents that are attached to a purchase requisitions • Ability to communicate special payment requests on a purchase requisition, and allow the request to flow through the workflow of the system • Ability to have more than one set payment term • Ability for a vendor to be assigned a type, such a diverse vendor classifications • Ability to search for commodity codes assigned to a good or service and display vendors selling the good or service being searched • Ability to search for a vendor and display commodity codes assigned to a good or service • Ability to allow for changes to a purchase requisition • Ability to set up notifications within a workflow to notify set recipients • Ability to search for a contract ○ Search by types: ▪ CMS (State Master Contracts) ▪ Consortia ▪ Illinois Correctional Industries ▪ University ▪ University System ○ Search results display a summary of contract detail • Ability to search for specific keywords within a contract • Ability to copy and paste text • Ability for text to wrap, for ease of view • Ability to add attachments, and the attachments flow through the system onto the purchase order • Provide system help available to user, possible pop-up after clicking on an icon • Ability to cancel a requisition or purchase order • Ability to retract a requisition once submitted <i>Director Council</i>			

3.0 Create a Purchase Requisition

Num ber	Describe Potential Solutions	Category	Impleme ntation Level	Related Issue(s)
	<i>Include:</i> • Ability to add attachments and flow through to the purchase order. ○ Ability to determine internal documents ○ Ability to determine external documents • Ability for the user to customize notification preference. • Ability to copy a requisition			

Chapter 16: Solutions Prioritization Matrix

The recommendation for improvements were reviewed and the potential solutions were prioritized by the Director Council. The below matrix contains the potential solutions and each ranked score.

Solution Prioritization Matrix: Create a Purchase Requisition						
There are two levels of implementation						
'Short Term' notes improvements on the current system and processes prior to the RFP for a new system						
'Long Term' notes improvement to the process with a RFP for a new system.						
Describe Potential Solutions	Ease of Implementation:	Permanence of the Solution:	Impact of the Solution:	Cost of the Solution:	Total Score (Average of The total product from each participant):	Ranking
	1 (very difficult) - 5 (very easy)	1 (temporary) - 5 (permanent)	1 (low) - 5 (high)	1 (high) - 5 (low)		
	Avg of attribute from each participant)	Avg of attribute from each participant)	Avg of attribute from each participant)	Avg of attribute from each participant)		
Create a solution to communicate the status of where a requisition is within the process.	2.33	3.89	3.33	2.78	92.78	6
Create a single location to communicate information regarding 'Creating a requisition'.	3.78	3.89	3.67	3.67	189.56	2
Determine ways to reduce non-conforming purchase orders.	2.56	3	3	3.22	94.56	5
Develop consistencies in the procedures and provide a shared understanding by all users.	2.22	2.67	3.11	2.89	68.33	7
Refine the existing training program on 'Create a requisition' to ensure the attendees have a shared knowledge of the requisition process.	3.44	3.56	3.33	3.33	159.22	3

3.0 Create a Purchase Requisition

Require Users of the requisition system to attend training prior to access being granted to create a requisition.	3.44	3.78	3.78	3.67	195.56	1
Work with existing system vendors to enhance capabilities until a new system can be implemented.	2.33	2.89	3.44	1.78	49.44	8
Ability to import certified vendor information for diverse vendors into vendor ID in system.	2.89	3.78	3.56	3.33	152.22	4

Chapter 17: Future State SIPOC Diagram

Process Name				Date
3.0 Create a Purchase Requisition – Future State				12/02/16
SUPPLIERS	INPUTS	PROCESS	OUTPUTS	CUSTOMERS
<u>Who</u> provides input to the process	<u>What</u> goes into the process	<u>How</u> the inputs are transformed to outputs	<u>What</u> comes out of the process	<u>Who</u> received the outputs of the process
University System departments Vendors Grants & Contracts UI Risk Management (for insurance information, when needed)	Electronic formatted requisitions Order Details (price/quantity/C-FOAPAL, other details) Quotes, attachments and electronic formatted files Contracts and service agreements, if needed Approvals Documentation (Prohibited approval, Restriction approval, Non-Conforming Letter, Special Payment Request Form)	Receive Purchase Request Receive electronic quote(s) Confirm Compliance Documentation Create Requisition Obtain Approvals Transmit Requisition	Approved Requisition Quotes (as attachments) Approvals Audit Trail Interface to contract system	Purchasing

Chapter 18: Future State Requirements

This is a comprehensive list of functional requirements and technical requirements for the future state of the Create a Purchase Requisition process. Excluded from this list are any requirements for functionality outside of the scope of this specific process, such as security, accessibility, etc., which will be handled in a different process.

The Create a Purchase Requisition provides the:

- Ability to have a workflow within the entire system to see the status the requisition is in during the process
- Provide APIs to interface with systems
- Provides a user friendly visual application
- Ability to generate reports on the data within a requisition
- Ability to access historical information
- Ability to access documents, previous Sole Source RFPs, Contracts, vendor quotes, and other documents that are attached to a purchase requisitions
- Ability to communicate special payment requests on a purchase requisition, and allow the request to flow through the workflow of the system
- Ability to have more than one set payment term
- Ability for a vendor to be assigned a type, such as diverse vendor classifications
- Ability to search for commodity codes assigned to a good or service and display vendors selling the good or service being searched
- Ability to search for a vendor and display commodity codes assigned to a good or service
- Ability to allow for changes to a purchase requisition
- Ability to set up notifications within a workflow to notify set recipients
- Ability to search for a contract
 - Search by types:
 - CMS (State Master Contracts)
 - Consortia
 - Illinois Correctional Industries
 - University
 - University System
 - Search results display a summary of contract detail
- Ability to search for specific keywords within a contract
- Ability to copy and paste text
- Ability for text to wrap, for ease of view
- Ability to add attachments, and the attachments flow through the system onto the purchase order
- Provide system help available to user, possible pop-up after clicking on an icon

3.0 Create a Purchase Requisition

- Ability to cancel a requisition or purchase order
- Ability to retract a requisition once submitted

Chapter 19: Subject Matter Expert Team

The following individuals participated on the Subject Matter Expert Team of the BPI [List Process] project:

Name	University/Department	Title
Aaron Rosenthal	OBFS - UIC Purchasing	ASST DIR CONTRACTS AND SYST
Barb LeGrant (Technical SME)	OBFS-Business Solutions & Support	ASSOC DIR BUS INFO SYST
Dan Szajna	OBFS – AVP Procurement Services	Assoc Dir COMPL POLICY CONFL
Jacqueline Anderson	OBFS - UIUC Purchasing	BUSINESS/ADMINV ASSOCIATE
Jana Sage	UIUC-Intercollegiate Athletics	ADMINISTRATIVE AIDE
Maria Thompson	UIUC Facilities and Services	BAA PROCUREMENT MANAGER
Mary Urbina	UIC – Biologic Resources Laboratory	Assoc Director of Business Affairs
Megan Wells	OBFS – UIUC Purchasing	Contract Coordinator
Mike Long (Technical SME)	OBFS-Business Solutions & Support	SR APP SPEC
Mike Nevill	UA – AITS	Asst Dir TAM
Susie Baker	OBFS-University Payables	ASSOC DIR PAYMENT SERV
Suzanne Lowry	UIUC-Civil & Environmental Eng	RES AND POLICY ANALYST
Vernell Hammons	OBFS - Procurement Diversity	SUPPLIER DIV COORD
Viktor Glozeris	UIC- Facilities Management Admin	ASST DIR OF SYSTEMS & SVCS

Chapter 20: Campus Focus Group Participants

The following list of individual participated in a Campus Focus Group meeting either during the current state and/or the future state of the BPI [List process] project.

[List each participant, Last Name, First Name, and sort in Alphabetical order.]

Name
Aldana, Magda
Benner, Penny
Black, Jennie
Brewer, Grant
Cole, Ann
Curtis, Beverly
Dillman, Cindy
Dinglasan, Michelle
Fricke, Jim
Gavel, Jennifer
Gerard, David
Harmon, Allison
Helmuth, Angie
Helregel, Sandra
Hendrick, Amy
Johnson, Kimberly
Kilmer, Eleanor
Lee, Denise
Lile, Andrea
Luna, June
Lynn, Laquashei
McCallen, Mary Kay
Mecum II, Kipling
Myers, Karen
Pugh, Elizabeth
Reynolds, Maile

3.0 Create a Purchase Requisition

Name
Riddle, Lynette
Simpson, Evan
Stewart, Aaron
Sully, Myra
Verchota, Maureen
Volk, Emily
Williams, Daniel

Appendix A: Business Glossary

Master Contract

Contract where Purchase Orders refer to the original contract when goods or services are needed that meet the specifications of the master contract

Recurring Order

Order with recurring need of good or service with specified delivery time and quantity

Standing Order

Order with recurring need of good or service on an as-needed basis with undefined quantity

University

Each Campus

University System

All campuses and their extensions, and Administration

Catalog Vendor

A vendor for which the University has a strategic contract in place and for which preapproved contracted items with set pricing can be ordered through iBuy either from a hosted or punch-out catalog.

Terms used within the iBuy application pertaining to a catalog vendor.

Hosted catalog vendor has their catalog of products reside within the iBuy application, and displays the items and pricing.

Punch-out vendors allow you to go to the vendor's website and add products to a shopping cart that will be loaded into iBuy.

Contracted Vendor

A vendor for which the University has a strategic contract in place.

Non-Catalog Vendor

A vendor for which the University does not have a strategic contract with catalog in place in iBuy, but that users can still purchase from.