

Source2Pay Project

Process – System Security Authority/
Charge Card On-boarding
Future State
Focus Group Meeting
March 2018

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

Process – System Security/Authority and Charge Card On-boarding

Purpose of the process

The process ‘System Security/Authority and Charge Card On-boarding’ exist to:

‘Provide access to applications supported by Purchasing and Procurement Services, and provide a charge card for small purchases, which allow authorized employees the tools to perform their job duties’

Process – System Security/Authority and Charge Card On-boarding

Process Boundaries

Begins:

When a need has been identified to access a Purchasing or Procurement Services' application(s), or a need for a charge card has been identified

Ends:

When the request has been granted or the request has been denied with a reason provided.

Process – System Security/Authority and Charge Card On-boarding



Customer Focus Groups Summary

Process - System Security & Authority

The units follow the process described.

Issues identified were with the SecApp and the difficulty a USC has in determining what access a user needs to be granted.

System Security & Authority Future State Recommendations

Provide a list of available access profiles for the applications Procurement Services and Purchasing provide support to

System Security & Authority Future State Recommendations

**Create a visual workflow to
communicate the timeline to
create/grant access to the Procurement
Services and Purchasing applications.**

System Security & Authority

Future State Recommendations

Document the process and procedures for on-boarding and update of access to the Procurement Services and Purchasing applications.

System Security & Authority Future State Recommendations

Create a project to capture and document the process and procedures for off-boarding of a Procurement Services and Purchasing applications.

System Security & Authority Future State Recommendations

Create two new profiles to be used within the applications that Procurement Services and Purchase support.

System Security & Authority

Future State Recommendations

Provide system notifications when access has been granted to the applications Procurement Service and Purchasing provided support to.

System Security & Authority

Future State Requirements

- Ability to have automated workflow
- Ability to have one entry point to request access
- Ability to have a status assigned to the request
- Ability to view the status of the request as it moves through the workflow to be processed
- Ability to define profiles for purchasing and procurement services
- Ability to define profiles for purchase roles
 - The ability to define dollar limit access
 - The ability to define dollar limit access at different levels
- Ability to have levels of approvals
 - Director/Department head

Customer Focus Groups Summary

Process – Charge Card On-boarding

The units follow the process described.

Issues identified were differences in limit amounts a unit gave a card and the bank had a higher limit on the card.

Charge Card On-Boarding Future State Recommendations

Create a visual workflow to communicate the timeline to approve and grant access to a University Charge Card.

Charge Card On-Boarding Future State Recommendations

Document the process and procedures for on-boarding and update of access to a University Charge Card.

Charge Card On-Boarding Future State Recommendations

Create a project to capture and document the process and procedures for off-boarding an issued University Charge Card.

Charge Card On-Boarding Future State Recommendations

**Create a list of Department Head and
their chart/org**

Charge Card On-Boarding Future State Requirements

- Ability to support multiple types of Charge Cards in one system
- Ability to have a web based application/agreement form that is sent with the request
- Ability to have workflow to include the following:
 - Ability to see the status of the requested Charge Card
 - Ability to receive a type of notification/alert
 - Notification/alert include when
 - Information is incomplete
 - Information is completed
 - Application is sent to the bank for processing
 - When the card is issued

Next Steps

- Present feedback to Project's process Team
- Finalize future state

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Thank you!