Source2Pay Project

Process – Change Order Processing
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
- Goal for being participating on a Focus Group
Current State Overview

- Identify Need for Change Order
- Submit Request for Change Order
- Assign, Review & Process Change Order
- Complete Change Order
Identified Issues

- Notification is sometimes going to an individual no longer an employee
- Units not knowing the status of change order
- Too many ways to submit a change order
- It is University policy that the over tolerance is 10% or $150 per a line item
- Very time consuming to prepare a CO in iBuy
Identified Issues

- Having to work or complete a CO in multiple systems
- Systems don’t fully interface
- Lack of an electronic workflow for CO’s
- When CFOAPALs are changed via change order, problems are caused downstream in the process
- Too many people submit a request for the same change order within a unit
- Units don’t know they need to notify Payables when a CO has been processed and the need for the change order was due to issues on a received invoice
Future State Recommendations

Use one or fewer system(s) for Change orders that allows a requestor to create, submit, track, complete, notify and report on change orders.
Future State Recommendations

Stricter enforcements to follow policies and procedures
Future State Recommendations

Fully Integrate iBuy and Banner to process change orders from two sources
Future State Requirements

Ability to:
1. Have an electronic workflow for change orders
2. Create, submit, track, complete, notify and report on Change Orders
3. Allow attachments of documentation to a change order request
4. Cross reference change orders for duplicates
5. Fully integrate with all systems including payables, purchasing, accounting and fixed assets
6. All fields on a PO need to be available when creating a CO including (C-FOAPAL, Qty, price, ship to, commodity code, accounting date, unit of measure, item description, catalog number, delivery options, FOB clauses and customer fields)
Next Steps

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