26.0 Change Order Processing
Process Report
March 2018
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26.0 Change Order Processing

Overview

This process describes the steps involved when requesting, processing and posting a change order for purchases.

Illinois Mandate Symbol - 🎓

University Policy Symbol - 📚

Professional Mandate Symbol - 📦
Process Executive Summary

Business Process

The Change Order process exists to have steps and policies in place to make changes to a purchase order or a contract after it has been executed; the purpose of the process to have a process in place to make such changes.

The process starts when a need for a change order has been identified usually by a department unit from a vendor or Payables. The unit submits a request for a change order and/or works with Purchasing to determine if a change order needs to be posted on the procurement Bulletin. Once submitted Purchasing is responsible for getting the change order approved and posted to the Bulletin as well as processing it in either iBuy or Banner.

Once reviewed for completeness, the change order is submitted in Banner and the Unit receives a notification that it is completed.

Current Process Activities

Approach

The current state process activities were mapped by the Subject Matter Expert (SME) and project process team. A SIPOC diagram was created to capture the tasks executed by the University System departments. 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 customer focus group meetings in the University System. The process report was presented to the Source2Pay Director Council where they ranked the proposed recommendations for implementation.

Key Findings

- Unable to have an over tolerance based on the entire purchase order along with the over tolerance by line item.
- Very confusing when submit a service desk manager ticket for a change order, and received an email the service desk ticket is closed and haven’t received a response from purchasing
- Lack of communication on the status of a change order

Improvement Recommendations

The process team identified nine suggested improvements. The team selected six improvements to recommend for implementation. The Director Council reviewed the six recommendations and ranked the proposed recommendations for implementation.

Listed are the top four recommendations for implementation:

1. Use the Banner feature to send updated PO’s to the vendor (Urbana)
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2. Train Buyers to use the manual notify to send updates to requestors during the process in service desk.

3. Stricter enforcements to follow policies and procedures

4. Update service desk to allow multiple emails or distribution lists to receive change order notifications.
### Chapter 1: SIPOC Diagram

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Order Processing – Current State</td>
<td>January 2018</td>
</tr>
</tbody>
</table>

#### SUPPLIERS

<table>
<thead>
<tr>
<th>Who provides input to the process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit/department</td>
</tr>
<tr>
<td>Vendors</td>
</tr>
<tr>
<td>Payables</td>
</tr>
<tr>
<td>SPO</td>
</tr>
<tr>
<td>Purchasing</td>
</tr>
</tbody>
</table>

#### INPUTS

<table>
<thead>
<tr>
<th>What goes into the process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documentation (including invoice, estimates, pricing, revised terms and conditions)</td>
</tr>
<tr>
<td>PO</td>
</tr>
<tr>
<td>Change order justification form</td>
</tr>
<tr>
<td>Request for change order</td>
</tr>
<tr>
<td>SPO approval prior to posting</td>
</tr>
</tbody>
</table>

#### PROCESS

<table>
<thead>
<tr>
<th>How the inputs are transformed to outputs</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Identified need for change order</td>
</tr>
<tr>
<td>2. Submit a request for a change order</td>
</tr>
<tr>
<td>3. Review, assign and process change order</td>
</tr>
<tr>
<td>4. Complete change order</td>
</tr>
</tbody>
</table>

#### OUTPUTS

<table>
<thead>
<tr>
<th>What comes out of the process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed change order</td>
</tr>
<tr>
<td>Change order not able to be processed</td>
</tr>
<tr>
<td>Notification of service desk ticket (request for change order)</td>
</tr>
<tr>
<td>Unique “R” request number</td>
</tr>
<tr>
<td>Updated PO, contract, terms</td>
</tr>
<tr>
<td>Revised Bulletin Posting</td>
</tr>
<tr>
<td>Notification to Payables to process the invoice</td>
</tr>
</tbody>
</table>

#### CUSTOMERS

<table>
<thead>
<tr>
<th>Who received the outputs of the process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchasing</td>
</tr>
<tr>
<td>Unit/department</td>
</tr>
<tr>
<td>Vendors</td>
</tr>
<tr>
<td>Payables</td>
</tr>
<tr>
<td>Public</td>
</tr>
</tbody>
</table>

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26.0 Change Order Processing
Chapter 2: Suppliers

Suppliers provide input to the process:

University Department Units

What they care about: That the change order gets completed accurately and very timely.
When they care: As soon as they submit a request for a change order.

Vendors

What they care about: Accuracy of the purchase order and getting paid, correct any discrepancies of the purchase order
When they care: When an invoice is due or prior to shipment of the product or service

Payables

What they care about: that the invoice and the PO match
When they care: when they don’t match and an invoice cannot be processed

SPO

What they care about: Valid justification of the change order
When they care: When a change order is submitted to the SPO for review and approval

Purchasing

What they care about: Integrity of the purchase order being accurate, and the change order being processed correctly, having complete information in order to process the change order
When they care: As soon as they are notified that a change order may be needed

Business Rules

Internal departments rule: be proactive and request the change order as soon as possible
Chapter 3: Inputs

Inputs are information or verification which goes into the process

Supporting Documentation

Including invoice, estimates/quote, pricing and terms & conditions

Purchase Order

Change Order Justification Form

Request for Change Order

Either a service desk ticket or an email

SPO Approval Prior to Posting

Approval via an email and published within the Bulletin

Business Rules

Must have a Change order justification form if the change order involves the Bulletin

Supporting documents are required for all change orders
Chapter 4: Process

A process is defined as the method for transforming inputs into outputs:

Identify Need for Change Order

It is determined that a change order is needed when the University System department units are notified by the vendors that the PO pricing is incorrect, there needs to be specific language on the PO, the amount on the PO needs to be increased or there is a notice from Payables that the invoice cannot be processed. During this phase the Unit reviews and researches what needs to be changed.

Submit Request for Change Order

During this phase the Department unit submits a service desk form or email with a request for a change order, attaches supporting documentation if needed and submits the request.

Assign, Review, and Process Change Order

The change order request is submitted to the specific purchasing office. Purchasing reviews and confirms if a change order can be done and if it will require posting to the Bulletin. The review also involves checking Banner for previous purchase orders related to the change order or looking for duplicate change orders for the same request. If the change order needs to be updated on the Bulletin, Purchasing submits a change order justification form on the Bulletin to the SPO for approval, once approved the change order is posted. Purchasing then determines if an amendment to the contract is also needed.

If the change order is from iBuy, it is submitted after completing many checks; if rejected or originally not from iBuy, the change order is completed in Banner.

Complete Change Order

The change order is completed in Banner by Purchasing reviewing it for completeness. After it has been submitted in the Banner system, the Department receives a notification from services desk manager or an email that the change order is complete. Lastly, Departments must notify Payables if the change was due to an invoice issue.

Business Rules

Change orders must follow both university and higher education purchasing policies (Procurement code and any applicable rules)
Chapter 5: Outputs

Outputs are the resulting information or entities that are produced as part of the process:

Completed Change Order

Change Order Not Able to be processed

Notification of a Service Desk Ticket

Unique “R” or request number
A number that is generated by the CA Service desk manager system

Updated Documents
Includes purchase order, contract and terms

Revised Bulletin Posting

Business Rules
None
Chapter 6: Customers
Customers receive the output of the process.

Purchasing
What they want: Correct and accurate information in order to process a change order

Unit/Department
What they want: A completed change order processed in a timely manner so that payment can be made to the vendors

Vendor
What they want: A completed change order processed in a timely manner in order to be paid

Payables
What they want: The PO and the invoice to match in order to process the invoice

Public
What they want: Accurate information and transparency on Bulletin postings

Business Rules
[List any Business Rules]
Chapter 7: Customer - Oversight Roles

Customers who provide oversight and what oversight is needed: (Example Funders, OBFS, Auditors, Board of Trustees (BOT), Legislature, Public)

Internal and External Auditors

What they want: Compliance with the process and University & Procurement policies

Business Rules
Chapter 8: Questionnaire for Current State Analysis

1. Why does the process exist?
   To have steps and policies in place to make changes to a PO or contract after it has been executed.

2. What is the purpose of the process?
   To have a process in place to make changes to a PO or Contract after it has been executed.

3. What are the process boundaries (i.e., when does it start and end?)
   The process starts when a need for a change order has been identified.
   The process ends when a change order is complete, posted and/or customers have been notified.

4. What are the major activities/steps in the process?
   See Chapter 4: Process (Ctrl-click to follow link)

5. What is the expected outcome or output of the process?
   See Chapter 5: Outputs (Ctrl-click to follow link)

6. Who uses the output of the process, and why?
   See Chapter 6: Customers (Ctrl-click to follow link)

7. Who benefits from the process, and how?
   Units/departments, Vendors, Payables

8. What information is necessary for the process?
   See Chapter 3: Inputs (Ctrl-click to follow link)

9. Where does that information come from?
   See Chapter 2: Suppliers (Ctrl-click to follow link)

10. What effect does that information have on the process and output?
    The inputs and information are what go through the process and produce the outputs

11. Who is primarily responsible for the process?
    Purchasing

12. What other units/organizations participate in or support the process?
    Units/departments, Payables, vendors

13. What Information Technology system(s) support the process?
    - Banner
    - BDM
    - Bulletin
    - iBuy
    - iCS
    - Microsoft office suite (email etc)
    - Service Desk Manager

14. What policies guide or constrain the process?
    Procurement policy rules
    University policies
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15. How often does the process get executed? Multiple times a day

16. What are potential defects with respect to the process?
   - Systems don’t fully interface (iBuy and Banner don’t fully interface),
     - Ex. If there is an existing CO in Banner, and then one is done in iBuy, iBuy doesn’t know there is an existing CO and Banner doesn’t recognize the information coming through.
     - Ex. Difficult to process a CO in iBuy due to all the checks and reviews (change order process is not fully integrated with Banner) Some change orders go through to Banner and some don’t depending if PO has been closed – have to check Banner which is very manual.

   a. How often do the potential defects occur? Daily

17. What types of challenges have employees who participate in the process raised?
   - Too many people submit a request for the same change order within a unit
   - Too many sources or ways to submit a change order
   - Units do not know to notify Payables customer service when a CO has been processed and it was for issues due to an invoice (they tend to send it to an individual) or not at all (departments think Payables is automatically notified and then can cause the invoice not to be processed)
   - Units not knowing the status of a change order or not being notified when its complete (seems to depend on the Buyer)
   - Notification is sometimes going to an individual, and that requestor may no longer be an employee or available – recommend notifying a group, so others are notified
   - Having to work or complete a CO in multiple systems
   - Very time consuming to prepare a CO to process in iBuy, have to check things like vendor status, vendor is active, that there are no other change orders done in Banner, make sure there is accounting date (today 25% go through the process without being rejected and 75% have to be done in Banner)
   - Sometimes customers are not aware review and investigation must occur in order to complete a CO

18. What types of challenges or concerns have customers raised?
   - Notification is sometimes going to an individual, and that requestor may no longer be an employee or available – recommend notifying a group, so others are notified
   - Having to work or complete a CO in multiple systems
   - Very time consuming to prepare a CO to process in iBuy, have to check things like vendor status, vendor is active, that there are no other change orders done in Banner, make sure there is accounting date (today 25% go through the process without being rejected and 75% have to be done in Banner)
   - Sometimes customers are not aware review and investigation must occur in order to complete a CO

19. Will the process be changed by another initiative in the near future?
   None
Chapter 9: Questionnaire for Potential Process Improvement Candidates

1. How would the process operate differently in the “Perfect Situation?”
   Have one system to request, submit and process change orders. Departments would be atomically notified or have real time status of a change order. Payables would be automatically notified when a change order is complete that impacts invoices.
   A system that would be able to identify existing change orders and PO’s for a change order to eliminate duplicate change orders.

2. What does the team hope to achieve through this improvement?
   A streamlined or workflow process with a real time statuses of where the Change order is in the process.

3. Who would benefit from the desired improvement to the process? Purchasing, Units, Vendors and Payables
   a. How would we know? There would be less duplicate change orders, fewer systems to process change orders and fewer status calls regarding change orders. Invoices would be processed in a timelier manner.

4. What data can be provided with respect to the process performance (e.g. service rating, cycle time, customer survey responses, etc.)?
   Service Rating would improve since units would be more self-sufficient and be able to know the status real time.
   Cycle times should improve if working from one system so it reduces the time to research PO’s in multiple systems.

5. Who should be included in any improvement discussions for the process?
   Purchasing, Departments/Units, 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?
  - If it involves the SPO approval = can take up to 1 day to 2-10wks, depends if amendment is needed
  - If no Bulletin or amendment required = 1 day up to 2 weeks

- How many touchpoints are there per process?
  - At least 7

- How many steps are involved in each process?
  - At least 22
Chapter 11: Feedback from Customer Focus Groups – Current State

The Current State process was presented to each University’s Customer Focus Group on Tuesday, January 23, 2018 and Wednesday, January 24, 2018. A total of seven people attended with two people in attendance from UIC, zero people from UIS, and five people from UIUC.

University Focus Group Summary

At each of the University Focus Group meetings, the attendee were presented with the major process steps and a description of the tasks completed within each of the four main identified steps within the process.

The Units agreed with the process description. The units added another reason for a change order is when the CFOAPAL is changed during the life of the purchase order.

One Unit noted they normally submit a request for a change order via email. Once they submitted using the service desk request and received horrible turnaround time.

Key findings:

- Unable to change the CFOAPAL on a purchase order, causing to create a change order
- Unable to have an over tolerance based on the entire purchase order along with the over tolerance by line item.
- Very confusing when submit a service desk manager ticket for a change order, and received an email the service desk ticket is closed and haven’t received a response from purchasing
- Lack of communication on the status of a change order

University Focus Group Report

Process

- Submit email to purchasing for a change order. One department has completed a service desk ticket, but not timely response was received, so submit email
- Will receive an email when change order is completed
- If payables issues, will contain verbiage within email
- Payables is not included on email from purchasing when payables need to be involved
- Payables will sometimes help purchasing
- We are grant funded, we had been given different fund codes and half way through the year switch the cfopal, where we would require a change order
- Sometimes we have used all the funds and need to do a change order

Issues:

- Issues when the vendor will substitute an item for the original item on the PO. The price is the same, but the description is different, will need to create a change order.
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- Issues when payable and purchasing is on the email, and the department needs to follow up, sometimes multiple times
- Get an estimate for an item, the item in estimate changes
- Why can't simple things be changed by the department, example when the CFOAPAL changes. Either let run through and send through a JV, or send in a change order
- Not knowing the status of the change order until receive an updated PO, or permission to create a new PO.
- Would like the option of changing the CFOAPAL when an invoice come in or when we order it (we have a clearing account and do a JV)
- Biggest issues when we do a PO and the invoice doesn’t match PO and is over tolerance, think we should use 10% over by overall instead of line item – this has resulted in a change order
- Seems to take a long time once you submit it, and the service desk ticket doesn’t include your original message so you have to go back to look up which one it is
- Not notified when tickets are closed or where things are
- Review – seems to take a long time and the unit is not kept informed of the steps or where it’s at
- If the ticket is closed (once it’s sent on to purchasing) it should tell you why or if it’s only closed in service desk ticket and it’s still open if it was forwarded to a particular department
- Include in the new system the ability to change the CFOAPAL or contact change
- Lots of issues when the FOAPAL changes on the PO – very involved and causes a lot of duplicate effort
- Have to do change control based on your inventory process

Other:
- Daniel is very helpful
Chapter 12: Opportunities for Improvements

The following opportunities for improvement were identified through team discussions, focus groups, and Director Council. Issues were categorized and the issues shown in **Bold** are connected to a Recommendation for Improvement in [Chapter 15: Recommendations for Improvements](#).

### Communications – Issues related to providing information

<table>
<thead>
<tr>
<th>C1</th>
<th>Notification is sometimes going to an individual that may no longer be an employee or available, recommend notifying a group so others are notified.</th>
</tr>
</thead>
<tbody>
<tr>
<td>C2</td>
<td>Units not knowing the status of change order or not being notified when its complete</td>
</tr>
</tbody>
</table>

### Policy/Procedures – Issues related to Procurement Policies and Procedures

<table>
<thead>
<tr>
<th>P1</th>
<th>Too many sources or ways to submit a change order</th>
</tr>
</thead>
<tbody>
<tr>
<td>P2</td>
<td>It is University policy that the over tolerance is 10% or $150 per a line item – this causes Over tolerance by line item not by overall purchase</td>
</tr>
</tbody>
</table>

### Technology – Issues related to system's lack of functionality to support the process

<table>
<thead>
<tr>
<th>T1</th>
<th>Very time consuming to prepare a CO in iBuy, having to check too many items like vendor status, active vendor and that there are no other CO's in Banner</th>
</tr>
</thead>
<tbody>
<tr>
<td>T2</td>
<td>Having to work or complete a CO in multiple systems</td>
</tr>
<tr>
<td>T3</td>
<td>Systems don't interface</td>
</tr>
<tr>
<td>T4</td>
<td>Lack of an electronic workflow for CO's</td>
</tr>
<tr>
<td>T5</td>
<td>Can't do a CO in iBuy for the following: unit of measure, item description, catalog number, deliver options, FOB and clauses. These will not flow to Banner</td>
</tr>
<tr>
<td>T6</td>
<td>When CFOAPALs are changed via change order, problems are caused downstream in the process which is why we don’t allow CFOAP changes via change orders</td>
</tr>
</tbody>
</table>

### Training – Issues related to lack of understanding the process

<table>
<thead>
<tr>
<th>TR1</th>
<th>Sometimes customers are not aware how much review and investigation must occur in order to complete a CO</th>
</tr>
</thead>
<tbody>
<tr>
<td>TR2</td>
<td>Too many people submit a request for the same change order within a unit</td>
</tr>
<tr>
<td>TR3</td>
<td>Units to not know to notify Payables when a CO has been processed and it was for issues due to an invoice</td>
</tr>
<tr>
<td>TR4</td>
<td>On line training materials should be kept updated</td>
</tr>
<tr>
<td>TR5</td>
<td>Finding training documentation should be easier</td>
</tr>
</tbody>
</table>
Chapter 13: Suggested Improvements

The following recommendations came from discussions with the process team members, and/or the Director Council, and/or University System focus groups. Not all improvements were selected by the process team. The selected improvements were presented to the University focus groups for feedback, and are recommended from review by the Director Council. A Suggested Improvement displayed in bold is associated with a Recommendation for Improvement, and is further discussed in Chapter 15: Recommendations for Improvements.

<table>
<thead>
<tr>
<th>Number</th>
<th>Category</th>
<th>Suggested Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Communications</td>
<td>A system that generates automatic updates to requestors in Banner</td>
</tr>
<tr>
<td>2</td>
<td>Communications</td>
<td>Train buyers to use the manual notify option in the service desk (2 votes)</td>
</tr>
<tr>
<td>3</td>
<td>Policies and Procedures</td>
<td>Only allow one entry point for CO’s requests (1 vote)</td>
</tr>
<tr>
<td>4</td>
<td>Policies and Procedures</td>
<td>Stricter enforcement of following policy and procedure (2 Votes)</td>
</tr>
<tr>
<td>5</td>
<td>Technology</td>
<td>For Now only complete change orders in Banner</td>
</tr>
<tr>
<td>6</td>
<td>Technology</td>
<td>Banner &amp; iBuy need to be fully integrated so change orders can work in iBuy (1 Vote)</td>
</tr>
<tr>
<td>7</td>
<td>Technology</td>
<td>Have only one or fewer systems for change orders that include: create, submitting, tracking, completing, notifying and reporting (6 Votes)</td>
</tr>
<tr>
<td>8</td>
<td>Technology</td>
<td>Update Services desk to allow either multiple emails to be entered to receive notifications or distribution lists to receive notifications (5 Votes)</td>
</tr>
<tr>
<td>9</td>
<td>Technology</td>
<td>Test and implement in Urbana the feature in Banner that allows updated PO’s to be sent to the Vendor like it does in iBuy (3 Votes)</td>
</tr>
</tbody>
</table>
Chapter 14: Feedback from Customer Focus Groups – Future State

The Future State process was presented to each University’s Customer Focus Group on Feb 27 and 28, 2018. A total of 4 people attended with [list number] people in attendance from UIC, 0 people from UIS, and 3 people from UIUC.

Campus Focus Group Summary

- Teach the buyers to use the notes feature in service desk such that it will then notify the requestor
- Stricter enforcement – would prefer ‘one on one consults” to help the requestor understand the situation
- Fewer systems for change orders
  - Service desk is so delayed with updates
  - Not done enough in Service Desk to have an opinion
  - Difficult to follow the history today

Campus Focus Group Report

UIUC Campus
- When CFOAPALS are changed via change order… still don’t like that the department cannot make those changes
- Need to reevaluate the process that allows departments to have multiple people executing Change Orders from a dept, sometimes there are multiple from the same dept

Recommendations
- Only person that can access the ticket assigned to a change order is the person that initiated it, can that be changed?
  - Yes, this is one of the ideas of the recommendation
- Teach the buyers to use the notes feature in service desk such that it will then notify the requestor
- Stricter enforcement
  - No, should say ‘one on one consults” would be better to help the requestor understand the situation, sometimes there are things that cannot be changed
- Ticketing system should notify the originator any time a change happens to that ticket
- Before it’s closed, the Originator is asked if it’s ok to close it
- Sometimes the ticket is closed but the PO and the encumbrance are still not close/released
  - Delay between when the ticket is marked closed and when the encumbrance is released, due to the Purchasing internal processes that utilize students to do the closing in mass

- What happened to the dept being able to change CFOAPALs or change the Contact info? Can any of this be done now?
  - Would replace the need for a Change Order

UIC
- Had instances when been asked to update a Vendor #, go to do but then they think the old invoices are nonconforming
- Fewer systems for change orders
  - Feels Service desk is delayed with updates
  - Not done enough in Service Desk to have an opinion
  - Difficult to follow the history today

Good overall if we get more notifications from the buyers
Chapter 15: Recommendations for Improvements

The recommendations have been identified for improvement. Three different categories were identified for the improvements, and each improvement received a level of implementation. 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 process better, help the users understand the process, and make sure the process works.

<table>
<thead>
<tr>
<th>Number</th>
<th>Describe Potential Solutions</th>
<th>Category</th>
<th>Implementation Level</th>
<th>Related Issue(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Use one or fewer system(s) for Change orders that allows a requestor to create, submit, track, complete, notify and report on change orders. Reduce the number of current systems by making it mandatory for everyone to submit a change order using Service desk. Update services desk to allow multiple emails to be notified or use distribution lists, train buyers to use the manual notify to update users throughout the process and only process change orders via Banner. Also look into using the existing feature in Banner to send updated PO’s to the vendor. By having change orders submitted via service desk will help with reporting on change orders, and remind users and buyers to work on change orders. Service desk also allows requestors to add attachments. This solution would enforce the following of policies and procedures and in turn improve customer service, eliminate confusion and allow requesters to better track their requests instead of sending emails.</td>
<td>Technology</td>
<td>Short Term</td>
<td>T1, P1, C1, C2</td>
</tr>
<tr>
<td>2</td>
<td>Update service desk to allow multiple emails or distribution lists to receive change order notifications.</td>
<td>Technology</td>
<td>Short Term</td>
<td>C1</td>
</tr>
<tr>
<td>3</td>
<td>Use the Banner feature to send updated PO’s to the vendor (Urbana) Test and implement in Urbana the Banner feature that allows updated POs to be sent to the Vendor.</td>
<td>Technology</td>
<td>Short Term</td>
<td>T7</td>
</tr>
<tr>
<td>4</td>
<td>Stricter enforcements to follow policies and procedures Agree to one process with few systems, quit making exceptions, and return all change order requests to the requestor if the agreed process is not followed.</td>
<td>Policy and Procedure</td>
<td>Short Term</td>
<td>P1</td>
</tr>
<tr>
<td>5</td>
<td>Train Buyers to use the manual notify to send updates to requestors during the process in service desk.</td>
<td>Training and Communications</td>
<td>Short Term</td>
<td>C1</td>
</tr>
</tbody>
</table>
### 26.0 Change Order Processing

<table>
<thead>
<tr>
<th>Number</th>
<th>Describe Potential Solutions</th>
<th>Category</th>
<th>Implementation Level</th>
<th>Related Issue(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Fully Integrate iBuy and Banner to process change orders from two sources</td>
<td>Technical</td>
<td>Long Term</td>
<td></td>
</tr>
</tbody>
</table>
The recommendation for improvements were reviewed and the potential solutions were prioritized by the Director Council. The below matrix contains the potential solutions for short term implementation and each ranked score.

<table>
<thead>
<tr>
<th>Solution Prioritization Matrix: Change Order Processing</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Describe Potential Solutions</strong></td>
</tr>
<tr>
<td>---------------------------------</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
<tr>
<td>6</td>
</tr>
</tbody>
</table>
## Chapter 17: Future State SIPOC Diagram

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Order Processing – Future State</td>
<td>March 2018</td>
</tr>
</tbody>
</table>

### SUPPLIERS

**Who** provides input to the process

Unit/department

Vendors

Payables

SPO

Purchasing

### INPUTS

**What** goes into the process

Documentation (including invoice, estimates, pricing, revised terms and conditions)

PO

Change order justification form

Request for change order

SPO approval prior to posting

### PROCESS

**How** the inputs are transformed to outputs

1. Identified need for change order
2. Submit a request for a change order
3. Review, assign and process change order
4. Complete change order

### OUTPUTS

**What** comes out of the process

Completed change order

Change order not able to be processed

Notification of service desk ticket (request for change order)

Unique “R” request number

Updated PO, contract, terms

Revised Bulletin Posting

Notification to Payables to process the invoice

### CUSTOMERS

**Who** received the outputs of the process

Purchasing

Unit/department

Vendors

Payables

Public
Chapter 18: Future State Requirements

This is a comprehensive list of functional requirements and technical requirements for the future state of the [list process] 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.

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)
Chapter 19: Subject Matter Expert Team

The following individuals participated on the Subject Matter Expert Team of the BPI Change Order Processing project:

<table>
<thead>
<tr>
<th>Name</th>
<th>University/Department</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Susie Baker</td>
<td>University of Illinois System Office/Payables</td>
<td>Assoc Dir Payment Serv</td>
</tr>
<tr>
<td>Jennifer Black</td>
<td>UIUC/Crop Sciences</td>
<td>Account Technician III</td>
</tr>
<tr>
<td>Ken Burger</td>
<td>UIUC-Purchasing</td>
<td>Asst Dir of Purchasing</td>
</tr>
<tr>
<td>Vernell Hammons</td>
<td>University of Illinois System Office/Office of Diversity</td>
<td>Supplier Diversity Coordinator</td>
</tr>
<tr>
<td>Barb LeGrant</td>
<td>University of Illinois System Office/AITS</td>
<td>Assoc Dir Bus Info Syst</td>
</tr>
<tr>
<td>Karen Mueller</td>
<td>University of Illinois System Office/Strategic Procurement</td>
<td>Bus/Adminv Assoc</td>
</tr>
<tr>
<td>Karen Sivils</td>
<td>University of Illinois System Office/AITS</td>
<td>IT Coord Software Anlys</td>
</tr>
<tr>
<td>Marge Stanko</td>
<td>UIC-Purchasing</td>
<td>Purchasing Officer III</td>
</tr>
<tr>
<td>Maria Thompson</td>
<td>UIUC/Facilities and Services</td>
<td>BAA Procurement Manager</td>
</tr>
</tbody>
</table>
Chapter 20: University Focus Group Participants

The following list of individuals participated in a University Focus Group meeting either during the current state and/or the future state of the BPI Change Order Processing project.

<table>
<thead>
<tr>
<th>Name</th>
<th>University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Penny Benner</td>
<td>UIUC</td>
</tr>
<tr>
<td>Cathrine Cunningham</td>
<td>UIUC</td>
</tr>
<tr>
<td>Rene Dunnam</td>
<td>UIUC</td>
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<tr>
<td>Angie Helmuth</td>
<td>UIUC</td>
</tr>
<tr>
<td>Denise Lee</td>
<td>UIC</td>
</tr>
<tr>
<td>June Luna</td>
<td>UIUC</td>
</tr>
<tr>
<td>Jessica Salgado</td>
<td>UIC</td>
</tr>
<tr>
<td>Mary Urbina</td>
<td>UIC</td>
</tr>
</tbody>
</table>
Appendix A: Business Glossary

None