

I'm a new employee and I need...

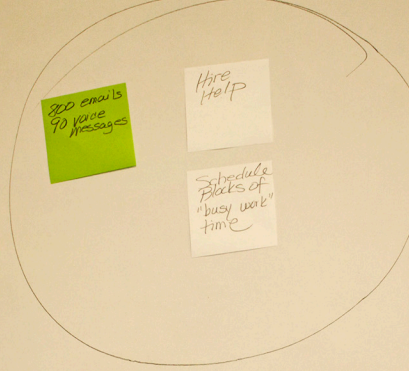
Computer

1

Hire project person to clean up vendors
Vendor list are not complete
ITF assets
Purchasing can email to
Purchasing can email to
Purchasing can email to
Purchasing can email to

Can a Requester
Have to
Have to
Have to

2



3

NO Financial
Approval Authority
Purchasing List all products
Vendor List all products
Equipment List
Purchasing List all products
Vendor List all products
Equipment List
Purchasing List all products
Vendor List all products
Equipment List

4

Approval Authority
Purchasing List all products
Vendor List all products
Equipment List
Purchasing List all products
Vendor List all products
Equipment List
Purchasing List all products
Vendor List all products
Equipment List

5

Place Order w/ Vendor
Email direct from a Requester
Vendor List all products
Equipment List
Purchasing List all products
Vendor List all products
Equipment List
Purchasing List all products
Vendor List all products
Equipment List

6

Delivered by...
Purchased Service
Vendor List all products
Equipment List
Purchasing List all products
Vendor List all products
Equipment List
Purchasing List all products
Vendor List all products
Equipment List

7

Employing Client
Vendor List all products
Equipment List
Purchasing List all products
Vendor List all products
Equipment List
Purchasing List all products
Vendor List all products
Equipment List

Future VSM

Action
Purchasing
Purchasing
Recommendation
Kaiser in Needed

①

Determine estimate cost
→ Check Budget to object

IF OK →
IF Not OK → STOP

Go to Purchasing Method
Correct Missing Information

Go to Purchasing Decision Tree

STOP = No
Go to BP try to verify other funds & grant
*Note #1 - sign diff subject
YES → BP sends email to request to move

PO Annual

PO one-time

Credit Card

Office Dept

Buy up PO

Use Card #

Originator orders receipt

Purchasing receives/forwards approves

originator buys item and asks to be invoiced and receives item

originator buys item and completes inv. receipt

Annual

RFQ \$70,000 Purchasing

\$70,000 Purchasing

Item Received

Item Not Received

originator is placed in E-Proc as leader destination

inv. e-req packing method and digital attachment to purchase order and appears

Annual

RFQ \$70,000 Purchasing

Purchasing creates I/PD in eRequestor

Purchasing end of month sends PO statement to cardholder

Cardholder sends receipt item qty, date & PO number sent to Purchasing by deadline

Purchasing performs 30 point check

missing on audit issue Purchasing resolves w/ card holder

②

Purchasing sends PO to vendor

If tangible note in eRequestor

Requestor creates receipt

Requestor uploads to Home-Markets

Purchasing sends by Master DE statement

Purchasing brings to AP, AP signs received for each portion

Order #3 Received Defective or damaged

Whoever discovers follows purchasing procedure

Purchasing follows Return Procedure writes R/P

③

Item Received

Receiving receives or in eRequestor assign #

Ryan writes # in packing slip

Package & packing slip are delivered to employee originator

Originator signs packing slip & brings back to Purchasing

Purchasing scans into MRP & uploads

Purchasing attaches scanned PO in eRequestor

Purchasing original PO in folder 1x day contents delivered to MRP

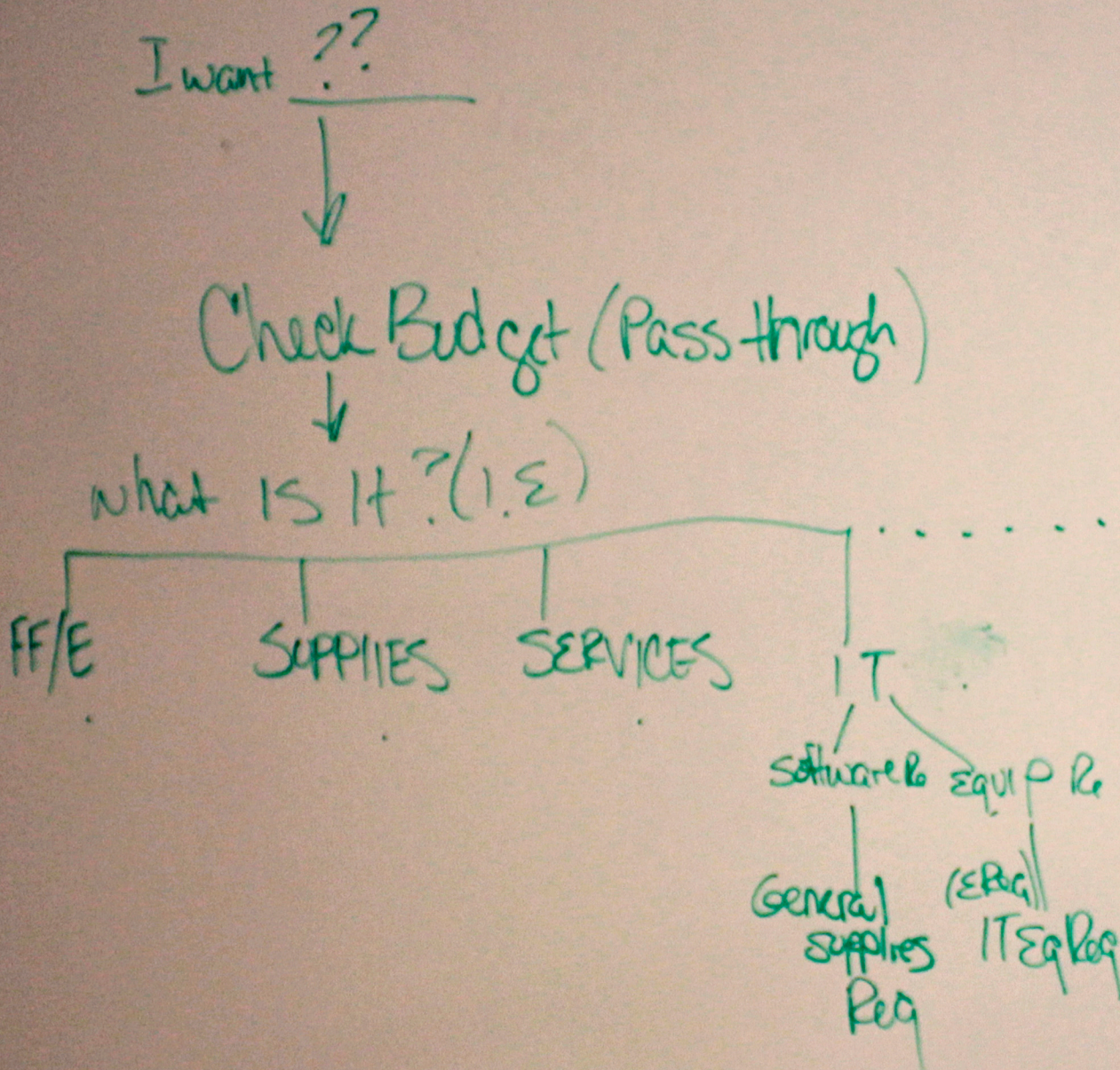
Initiate order

Process Order

Receive Order

Pay for order

Purchasing Decision Tree



Presentation Outline

1. Review Current Process (Cheryl)
2. Review Future Process (Sharon)
3. Review Recommendations (Karen) (A) explain decision tree (Molly)
4. Review Action (WJWH) Form - Marlene
5. Review Impact Effect Matrix - Leanne

How much time does it take?

- Cycle Time
 - time to complete task from one batch / doc step
- Queue / Lag
 - time work is held up or waiting
- Process Time
 - Cycle time + Queue time

Parking Lot

→ What method of purchasing is appropriate

- PO - Purchase w/ end date
- PO - Annual Order (good for 1 year)
- credit card
- Go buy w/o PO
- Petty Cash (↓ \$35 + time limit)

Communicate Decision Tree

E-Requestor
- track orders not received
- search feature

Directory
New employee
• Badge?
• Erequestor
• HPK

Systematic process of exiting employees

e-Requestor
Training

PAIN POINT
Budget authorities out
- holds up process

Bank of America Credit Card Purchase tracking

Consequences for Over spending to BA

PAIN POINT
Who is a good vendor to use?
Info not shared / no bulk advantage

Would Media Services Create a TRAINING FOR Ereq.