

WWWHF Action Form

What	Who	When	How	Follow-up (Check up or Check back)
Develop Interactive Purchasing Decision Tree: see notes	Purchasing Information Technology Web Support			
Conduct Receiving Lean Event (Impacts Purchasing, Facilities & A/P)	VP to assign Leadership Team, event team, facilitator			
Create an eRequester user guide (for both Purchasing and “originator” staff)	Purchasing/Logistics Media Services to assist			
Conduct regular Purchasing Training event (Like “Web Editor Training”). Include system updates, new features, etc.	Purchasing			
Develop a contract process (how do you know when to use a contract and what type of contract)	Logistics			
Purchasers/originators need access to “penny drop” to verify funding is available prior to creating a requisition in eRequester	BA and budget			

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eRequester export report (replaces the “Follow-up” and FAE” spreadsheets manually created and manually entries (duplicate entries)	eRequester (vendor) Purchasing			
eRequester: add “tag-able” as a field and/or also add field for tag# & serial #	eRequester (vendor) Purchasing			
eRequester: develop a new form called “Annual Items” form. Stop using the General Supply form for annual orders for items. This provides for an eRequester search for open one-time orders to assist is follow up (open > 30 days). Also reduces need for follow-up spreadsheet.	Purchasing			
Once the export report (Follow-up & FAE) is created for eRequester, the report is converted to a shared google.doc. This way A/P can enter the invoice amount for FAE rather than Purchasing entering the PO amount. Additionally, Receiving can access and know what orders are outstanding and deliveries expected. Also eliminates two manually created spreadsheets (Follow-up & FAE).	eRequester (vendor) Purchasing			

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When vouchers and invoice vouchers are closed in eRequester then eRequester posts the information to a tab available to A/ P in eRequester.	eRequester (vendor) Purchasing A/P			
Clarify clear process when goods are received defective or damaged. This would allow timeliness to complete return within allowable window.	Purchasing	ASAP	Add to Purchasing procedures (training)	Yes
Explore “change order” in eRequester (to eliminate the requirement to cancel an order if a change is needed). If you receive one item against an order and a change is needed, you must cancel and initiate a new order).	eRequester Purchasing			
Raise credit card limits for those card holders who have repetitive needs that are over the current limit (reduce the use of eRequester).	Originators BAs Purchasing			
Explore processing credit cards through eRequester. Explore utilizing US Bank export to eRequester	eRequester Purchasing Card Holders			
When Purchasing doesn’t know what the item is send the requisition back to originator for clear information (the mophead example)	Purchasing			

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Create a "Purchasing email account."	Help Desk Purchasing			