CONFIGURATION AND BUSINESS PROCESSES

Shop UW+
VISIBILITY TO STATUS

“I submit the paperwork, and then there’s a black hole for many weeks until it shows up in WISER”

“It seems to go from [Division] quickly and then it goes into a black hole and no one knows anything about it for 2 weeks”

“These [DPs] get "lost in space" for 6-8 weeks when they leave the department.”

• Users can see status for their orders, whose “desk” it’s on for approvals, payment status, etc.
• Users can see history of all actions for the end-to-end process, shopping-to-payment for their orders
• Some visibility may be limited due to confidentiality (e.g. recipients of test subject payments)
• Encumbrances will be visible in WISER
EASIER TO SEARCH AND LINK CONTRACTS

Phase I
• Central purchasing contracts repository implementation
• Search suppliers/associated contracts and link with purchase orders
• Notifications of important dates (e.g. term or pricing updates) can be set by contract administrators

Phase II
• Standard templates facilitate new contract authoring
• Supplier performance monitoring functionality introduced

“A better/easier vendor/contract search would also be nice.”

“There is just so much information required, and it is very hard to figure out if a vendor is on contract or not. These contracts seem to change without warning.”

“In need of a more robust search function.”
ELECTRONIC WORKFLOWS

“Online approval workflow would be a huge step forward.”
“The entire workflow should be in one tool, so that it is easy to find and track.”
“The fact that we were/are signing and routing paper is unacceptable.”

- Electronic workflows are a key element of the business process transformation
- A variety of factors can determine workflow (e.g. funding string, type of purchase, $ value of purchase, etc.)
- Approval requests will be sent by email with a link
- Alternative routing paths for workflow when approvers aren’t responsive
- The goal is to standardize workflows across campus while maintaining some flexibility to address unique situations
- Contract execution will be streamlined using electronic workflow and signature
- Electronic approvals will enhance internal controls
MOVE FROM PAPER TO ELECTRONIC PROCESSES

“That any of it is a paper process is a joke in today’s world. The time wasted for handwritten signatures, manual travel, manual tracking, and redoing lost paperwork is an expensive sunk cost - more than the time that would be spent on the learning curve of an electronic system. UW-Madison is at minimum 5-10 years behind the curve on this area, even with other UW universities in the state.”

• Paperless processes
• Electronic approvals and document attachment
• Easy access to supporting documents
• Electronic forms capability assists with:
  • Non-standard purchases (e.g. non-catalog, services, etc.)
  • DP and PIR requests
  • Encumbrance management
INTEGRATED SYSTEMS

“Need to go to different locations for different purposes on reqs and POs. Can this be combined into less locations?”

“It would be nice to combine the req creation and req lookup into one system.”

“...Add'l entries in secondary software It feels like there is a lot of redundancy, that the systems don't communicate effectively, and that the same information must be re-entered on multiple occasions.”

“Include in all-in-one tool with requisitions and PIRs”

• All purchasing and payment transactions run through one platform
• Integration with SFS to exchange data – SFS remains financial system of record
• Encumbrances in SFS flow to WISDM/WISER
• Integration with enterprise financial system
**BASIC ROLES**

**Shopper**
- Responsible for shopping for goods and services, creating carts, and assigning carts to Requestors.
- Limited user access outside of shopping functionality and purchasing permissions.
- Automatically assigned to every UW Employee.
- Do not need to know funding string.
- Can do purchase of less than $100 without additional funding approval.

**Requestor**
- Responsible for reviewing and submitting requisitions for approval.
- Finalizing accounting/shipping information, providing attachments and submitting requisitions for approval.
- A natural progression from the shopper role.

**Approver**
- Responsible for reviewing all requisitions submitted for their specific approval.
- May be allowed to approve, return, reject, forward, or add comments to requisition.
Cart Creation: Shopping cart created and submitted for workflow

Auto return or reject: Step driven to reduce human interaction before approvals

Department review: Approval step driven by financial or departmental threshold needs

Exception review: Approval step driven by product flags or other exception criteria

Purchasing review: Approval step driven by set criteria prior to PO creation and distribution

Purchase order creation: PO created for dispatch/distribution
SHARED SUPPLIER FILE

• Integration of UW-Madison’s Supplier file and Systemwide Supplier file into one at go-live
• Duplicate supplier clean-up in progress
• Every UW-Madison supplier number will change
• Continuing UW-Madison purchase orders will automatically update with new supplier numbers
• Access to historical data and old-to-new crosswalk in WISER
• Facilitates consolidation of spend across all campuses and leverage of pooled buying power

“Move it [DP process] online, with a shared vendor file and automated routing for approvals.”
VENDORS

• Dynamic dashboards will guide users to vendors who have the items they need
• Catalog Vendors
  • Current
    • 23 Vendors
    • 250K orders per year
  • Future
    • Add ~20 catalog vendors
    • Increase to ~400K orders per year

“Searching for products is difficult and not all state vendors have a punch out supplier.”
The search engine can be difficult (brings up items that have nothing to do with what I searched).”

“The shopping experience is not streamlined. It takes a lot of time to find items if you don’t have a specific item number. It is difficult to know the best place to get the item if it is offered from different suppliers.”
Training will provide staff with knowledge and skills needed to transition to ShopUW+

- Online role-based training will be provided
- Self-paced, self-service learning
- ShopUW+ Foundations

Based on their role(s) in the system, users will be aligned to a learning path that includes a variety of learning resources:

- Job Aids
- Self-paced e-learning & Micro-Learning Modules
- WebEx Interactive Knowledge Sessions
- Peer Coaching

ShopUW+ Essentials, a central web-based training repository, will house job aids, training materials and other information

Single point of contact for Customer Service

“Would be nice if there was a website or online training PPT I could access to refresh on rules.”

“...would appreciate overall and ongoing training on how to manage purchasing and payments for a whole office from a very basic level.”

“Refresher courses for contracts, requisitions, etc. would be helpful.”

“Great folks to help when needed!”
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Shop UW+

P2P WEBSITE: https://p2p.wisc.edu/