

***Online Assessment Tracking Database***

Sam Houston State University (SHSU)  
*2014 - 2015*

**Procurement And Business Services**

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**Goal** **Increase Efficiencies Of University Operations** 🔑  
Continue to develop and deploy automated solutions

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**Objective (P)** **Develop Automated Processes** 🔑  
Work within the new eProcurement SciQuest system to add approval of forms through the electronic workflow process, thus improving efficiencies for departmental end users.

**KPI Performance Indicator** **Automating Processes In Procurement And Business Services** 🔑  
Add Procurement and Business Services forms to the SciQuest system to automate the workflow and approval processes within the new eProcurement system, giving end users one system to operate in.

**Result** **Automation Of Forms** 🔑  
Procurement and Business Services has implemented the Non-Catalog form, Blanket Order form and the Purchase Order Change Notice within the new eProcurement system at this time. All forms have budget check and workflow for approvals behind them. Currently we have trained 246 campus end users who process purchase requests and our initial rollout is complete as of July 31, 2015. We will have ongoing training for new hires throughout the year, focused around HR hire dates.

We will continue to add additional forms to the system to increase efficiencies for our end users. Such forms will include the RA-22 Form -Request to Remove Equipment from Campus ,and the RC-21 Form -Request to Change Inventory.

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**Goal** **Data Driven Decisions** 🔑  
Develop and implement reporting tools and reports that allow visibility into revenue and expense activities within our Division

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**Objective (P)** **Financial Analysis Models** 🔑  
Develop and implement reporting tools and reports that allow measurement of procurement processes within SciQuest and Banner for University reporting and State reporting.

**KPI Performance Indicator** **Reporting Models For Procurement And Business Services** 🔑

Develop reports in SciQuest to produce analysis information on:

Spend by Supplier

Dashboard Reports for Departments on Spend

Spend Summary by ORG, Supplier and Item

Purchasing Reports by category

## Result

### Reporting Tools

The following reports can be generated from the new eProcurement system-

Spend by Supplier

Dashboard Reports for Departments on Spend

Spend Summary by ORG, Supplier and Item

Purchasing Reports by Category

Requisition Submit to Requisition Complete time

A few samples of the reports have been attached.

Procurement is also currently working with Texas State University (parent of our consortium buying catalogs) in the month of August on standardized reports for submittal to the Texas State University System. In addition, Procurement and Business Services will be creating a class and/or training materials for our end users on how they can pull their own reporting from the system.

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