



Online Purchase Requisition Project Review

August 6, 2013



TABLE OF CONTENTS

1. Project Identification.....	3
2. Project Description	4
3. Accomplishments	5
4. Plan for Resolution	7
5. Recommendations.....	8
6. Comments.....	9



1. PROJECT IDENTIFICATION

Project Identification	
Project Name	Online Purchase Requisition Workflow
Project Time Period	04/01/13 – 07/09/13
CWU Project Manager	Tina Short
CedarCrestone Project Manager	Gene Shoda



2. PROJECT DESCRIPTION

Below are the major 'components' of this project:

Project Components		
FEATURE	STATUS	COMMENTS
Purchase of PeopleSoft eProcurement Module	Complete	When the project team evaluated the delivered requisition area within the Purchasing module, it was determined to be difficult for end user data entry. The eProcurement module provided new AWE workflow technology and a friendlier user interface for requesters and approvers.
Implementation of eProcurement Module	Complete	
Setup of AWE Workflow Routing for ePro Module	Complete	The delivered requisition area within the Purchasing module uses an older technology for workflow called Virtual Approver. With the purchase of the eProcurement module, we were able to utilize AWE workflow routing. This tool allows for more control and routing options for the functional business area.
Security for AWE Workflow (Dynamic Role)	Complete	The project team uses dynamic role assignment to add and remove page access to the Online eProcurement module. The FMS System automatically removes and adds roles to users which provides time savings for the security group and also allows users timely access. It also provides an extra layer of security in that the system will automatically remove access based on system setup.
Security for eProcurement Module	Complete	

3. ACCOMPLISHMENTS

During the project, a number of deliverables and tasks were completed.

Deliverables	
Deliverable / Task	Comments
Project Charter	
Project Plan	
Communication Plan	
Fit Gap Analysis Report	
ePro System Design Document	
Functional/Technical Specs	
Questionnaire Sent to Focus Group	Sent to 31 users
Focus Group Sessions	6 sessions were held
Testing Plan and Execution	
Business Process Documentation	
Query Development	
Training Plan and Delivery	9 sessions delivered as of 8/6/2013
Training Documentation	
Deployment Plan	
Post Go Live Support	Included Help Desk in deployment process and provided support materials.



Other Accomplishments	
Accomplishment	Comments
Revision of the 3-10-615 Purchasing Procedure	
Knowledge Transfer	This included consultant transfer to CWU functional and technical staff as well as dissemination of the information to support teams, trainers and Help Desk. It included documentation, code reviews, set up and processing reviews.
Online Training Documentation Available for Requestors and Approvers to Reference	



4. PLAN FOR RESOLUTION

The following matrix details those 'items' that need to be completed between the time this document was turned over to CWU and when they will be completed.

Plan for Resolution		
FEATURE	STATUS	PLAN FOR RESOLUTION
Delegation Access for Approvers	Complete as of 8/6/13	



5. RECOMMENDATIONS

The following are recommendations that have been generated as a result of this project.

Recommendations		
DESCRIPTION	CRITICALITY	AREA
Establish backups for key project personnel and provide knowledge transfer to them.	High	Functional
During project planning, assess any training needs (functional or technical) and provide for training as part of the project plan.	Medium	Project Sponsorship / Project Management
Post Go Live Training Support	Medium	Project Management/Project Sponsorship
Post Go Live Reporting Support	Medium	Project Management/Functional



6. COMMENTS

Comments		
COMMENT	SUBMITTED BY	FOLLOW UP
Contact Requesters who have entered Requisitions post go live to solicit their feedback.	Tina Short	