

Cycle 1 Report-Out



May 10, 2018

Meeting Outline



1

Opening Remarks

10:00am – 10:20am
Jane Kaufman, Mike T., Craig Pollock

2

Video

10:20am – 10:30am
Title TBD

3

Ignite Overview

10:30am – 11:00am
Jane Kaufman

4

Break

11:00am – 11:10am

5

Reports: *VSM • PLC • SOP*

11:15 – 12:00pm
Larry Williams, Myhanh Fallarino, Joel Roach

6

Lunch

12:00pm – 12:30pm
Will be provided

7

Reports: *Reporting • Change Mgt. • QA • PLC*

12:30pm – 1:45pm
Richard Ishmael, Teddy Artemiuo,
Tawna Lawrence, Myhanh Fallarino

8

Break

1:45pm – 2:00pm

9

Group Exercise

2:00pm – 2:45pm
What's in the room?

10

Closing

2:45pm – 3:00pm
Jane Kaufman

Video

Guiding Principles

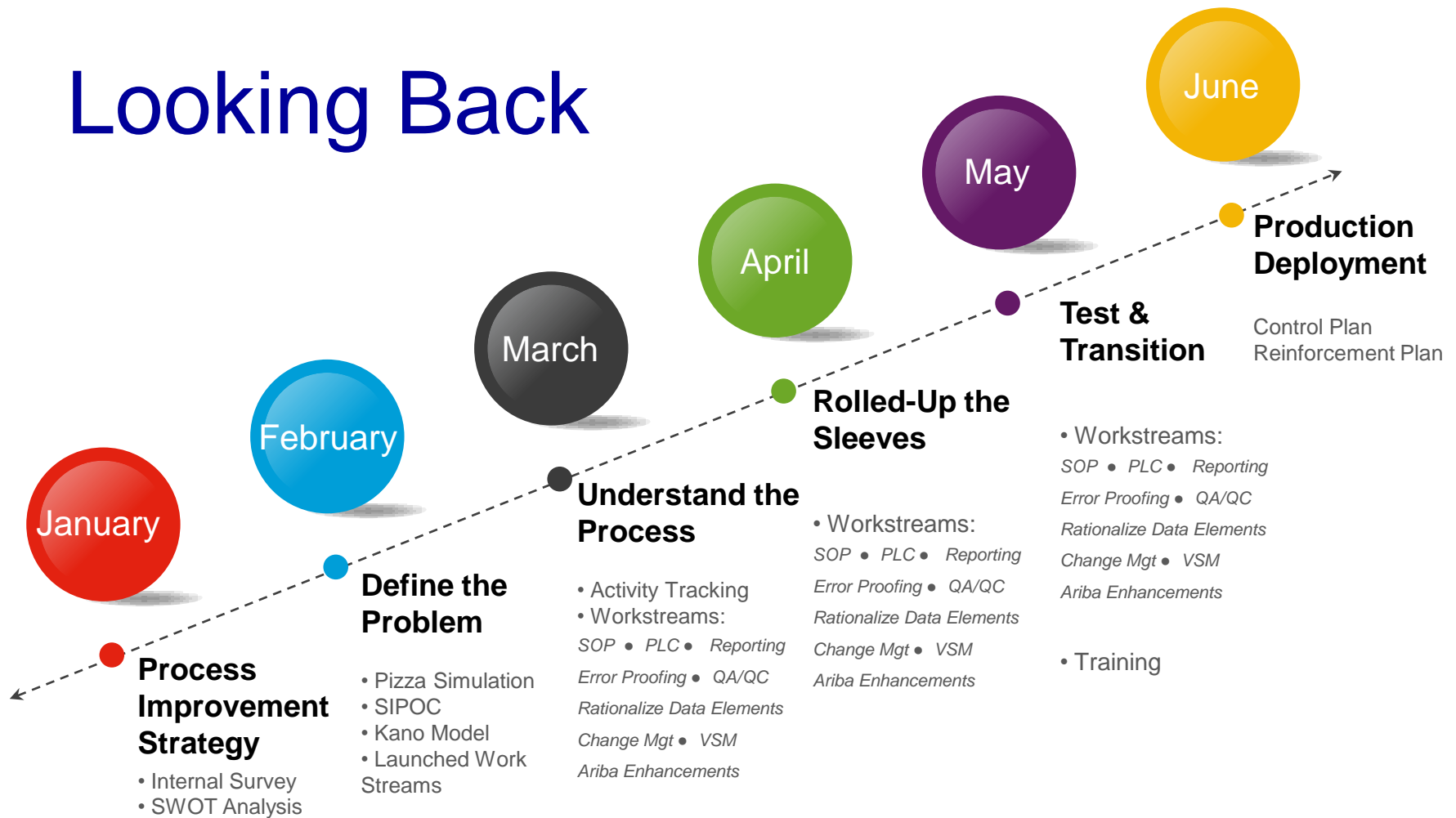
Our core values require us to “do it better”

Our Journey

- In 2017, organization and management changes in IT drove considerably more contract volume and exposed deficiencies in the procurement process
- After gathering customer sentiment, we heard that:
 - ✓ The process takes too long
 - ✓ It's hard to get status
 - ✓ Data in Ariba is bad and unreliable
- Mr. Moran said, “...*the future belongs to those who prepare for it.*”
- *Heeding Mr. Moran's advice, we set out to “do it better” by sparking change in Procurement*



Looking Back



Plan

Do

Check

Act

Leaning on Our Core Values

Accountability

Innovation

Consideration

Cooperation

Communication



Accountability

- Accountability was a primary focus area for PDCA cycle #1
- Rather than pointing the finger and blaming others, we committed ourselves to fixing the portion of the process we control
- We launched nine work streams to improve the process



Innovation

- Set an atmosphere of creative problem solving and empowered the team to question the status quo
- As we examined our process, system, & data no suggestion was too small or too silly
- Eliminated unnecessary fields & unused reports, activated unused modules, and established a standard work model



Consideration

- We placed the customer at the center and sought to understand their needs
- Used the Kano model to categorize requirements: “must-have”, “nice-to have”, and “delighters”
- Considered the associates and how to support each of you through the changes



Remember the stress-relieving Fun Events?

Mar 2 – Wawa • Mar 16 – Mocktail Party
Mar 30 tie dye t-shirts • Apr 4 Little Havana
April 20 ice cream social

Cooperation

- While we experienced creative tensions, we learned how to compromise and support each other
- We also asked for your flexibility as we placed you on work streams outside your natural comfort zone
- Finally, we asked that you to reach for “better” rather than “best” or “perfect”



Communication

- Communication was central to our success
- We had daily stand-up meetings, stakeholder updates, and regular sponsor meetings with Mike T.
- Consulted with Corp Comm for messaging and branding



Call-to-Action

The success of this change is everyone's responsibility

| IGNITE: Questions I need to answer | Do I have this info? | If no how will I obtain this info? | By when? |
|---|----------------------|------------------------------------|----------|
| Why is this change important to JMF? | Yes or No | | |
| Why is this important to Procurement? | Yes or No | | |
| What outcomes result from this change? | Yes or No | | |
| How will my customer/partners be impacted? | Yes or No | | |
| How can I contribute to the successful implementation of this change? | Yes or No | | |

By the end of Friday you should be able answer “yes” to each of these questions

Break

10 minute break

Value Stream Mapping



Goal



Objective

Document the process structure, flow of information and highlight critical insights.



The “Why”

Focus management on the most critical components of the process that require attention • Reduce Rework • Reduce Downstream NVA • Identify Product Families • Assign service levels and allocate proper staffing • Increase RTY



Impact

Improve management of the process • Use data to pinpoint kaizen improvements • Ensure appropriate staffing levels based on process capability • Increase confidence in the process

Components of Improvement

01

Organization / Behavior

Elevate our operational standards and performance as we adjust to more demanding customer expectations.

02

Process

Document the structure of our process, the flow of information through the process, uncover critical insights to fortify the process.

03

Data

Become stewards of our data. Manage our data as an asset and leverage it to drive operational excellence.

04

System

Adjust our usage of system(s) to improve operations and deliver customer recognizable value.



What is Value?



This is why customers pay us!

Impacts the *form-fit-function*



Eliminate

Identify & Eliminate Waste

Transportation • Inspection • Motion • Wait Time • Over-Processing • Over-Production • Defects • Human Talent

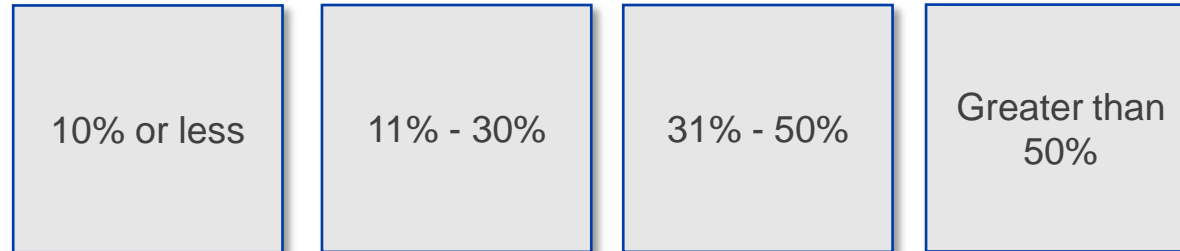


Control, Minimize, Reduce

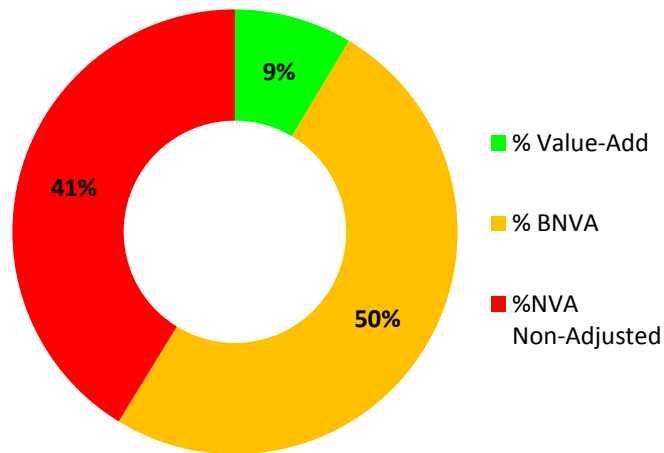
Required but needed for the process to function

How do you think we did?

What portion of our work activity do you believe was measured as value add?



VAN Analysis



- Not an “atypical” result
- Requires intentional effort and reinforcement to focus on what we will do with distinction to bring value to our customers

SWOT Analysis

Strength

Management Support

Team Cohesion

- We work together as a team
- We all want to be successful

Technical Knowledge

- Knowledge of specific commodities
- Support within the group
- Handling contracts
- Negotiation

Desire to Serve Customer

Tenure

- Long serving associates

Flexibility / Embrace of change

- Some will embrace change

Weakness

Strategy

- Do not / cannot see the bigger picture
- Lack of Strategic Thinking

Process

- Process takes too long
- Process is inconsistent
- Lack of std. operating procedures

Communication

- Poor (lack of) comm with outside groups
- Poor communication between internal groups

Organization, Behavior, Resources

- Silo'd Procurement operational setup
- Wrong resources doing the wrong work
- Lack of accountability

Data & Reporting

- Bad (inaccurate) data
- Lack of robust reporting

Systems & Tools

- Underutilized tools

Opportunities

Strategy

- Incorporate more strategic planning

Customer Impact

- Opportunity to grow into other areas
- Improve cohesiveness with other groups
- To touch more areas than ever before
- Gain confidence of customer

Process & Data Improvements

- Improve Data & Reporting
- Improve visibility

The "Deal"

- Examination of contracts and do more heavy lifting so partners can do less

Cooperation from Partners

- Legal will now use (work within) Ariba

Systems & Tools

- Opportunity to reengineer Ariba

Threats

No Confidence

- Customers work around us
- They believe they can do it better
- Not required to invite us to the table
- Lack of support from liaison groups

Failure

- Failure to show significant improvement
- Unwillingness to embrace change
- Frustration from internal and external events
- No motivation

Loss of Customer(s)

- May not use Procurement
- Customers will do their own negotiating
- Customers might do it better

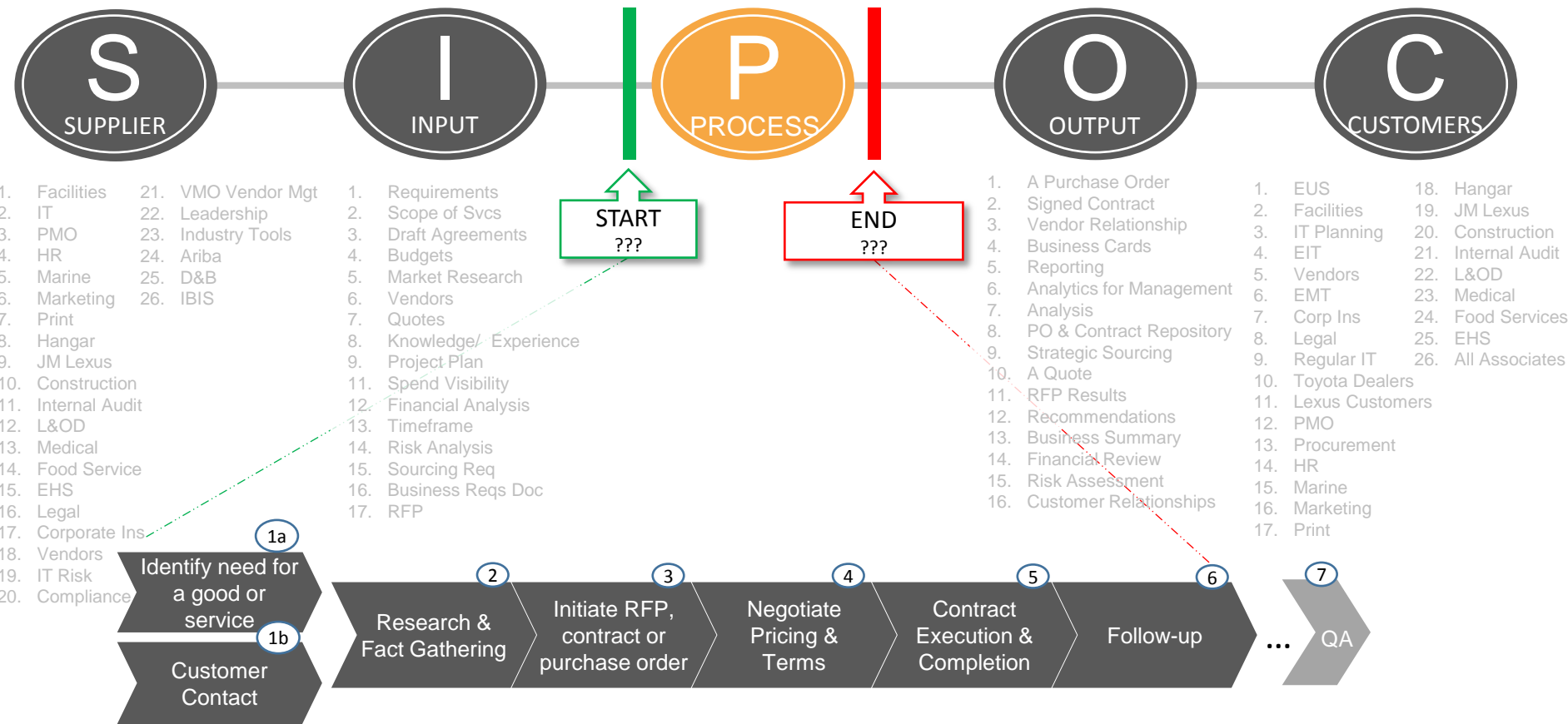
Obsolescence

- Become irrelevant

Bad data

- No sense of urgency

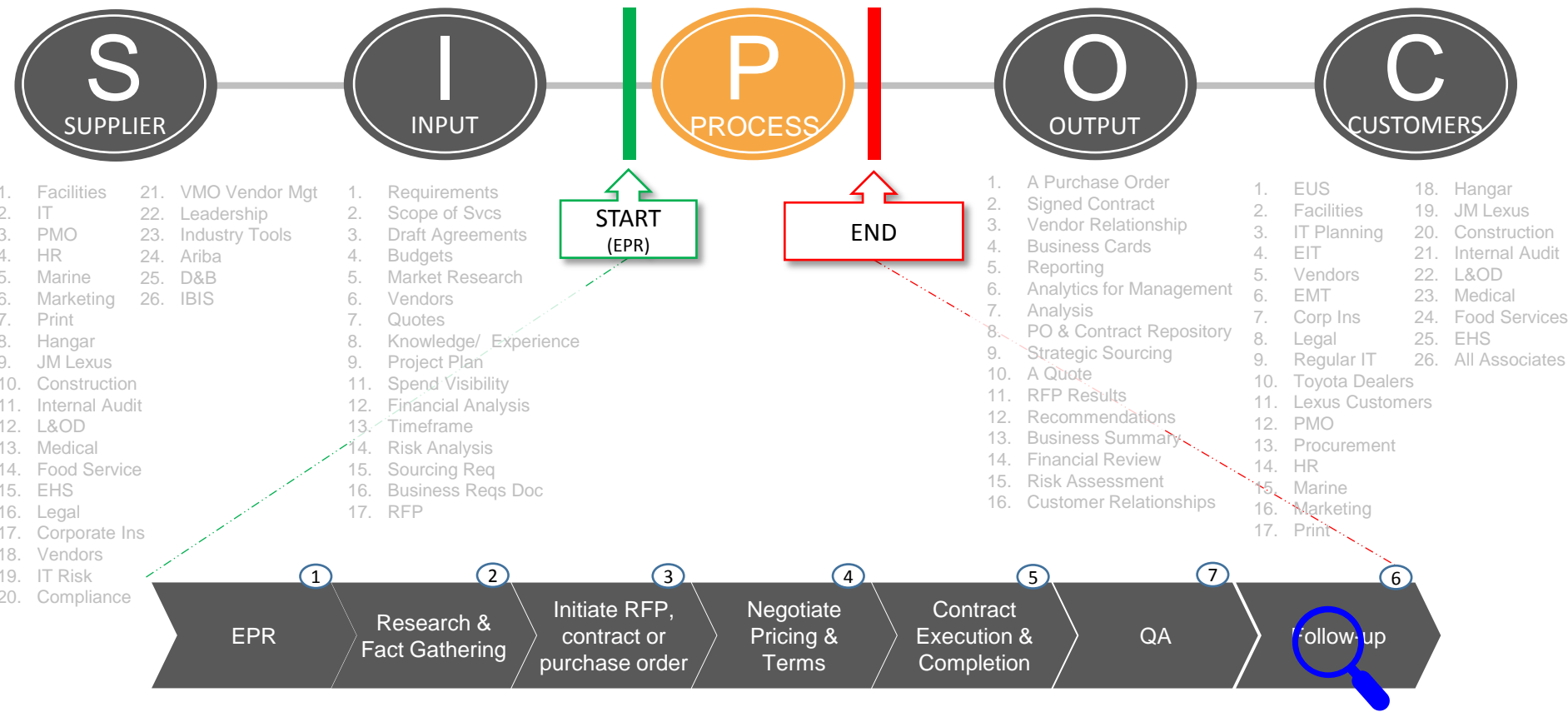
SIPOC: Procurement Process [BEFORE]



SIPOC (Before)



SIPOC: Procurement Process [AFTER]



SIPOC (After)



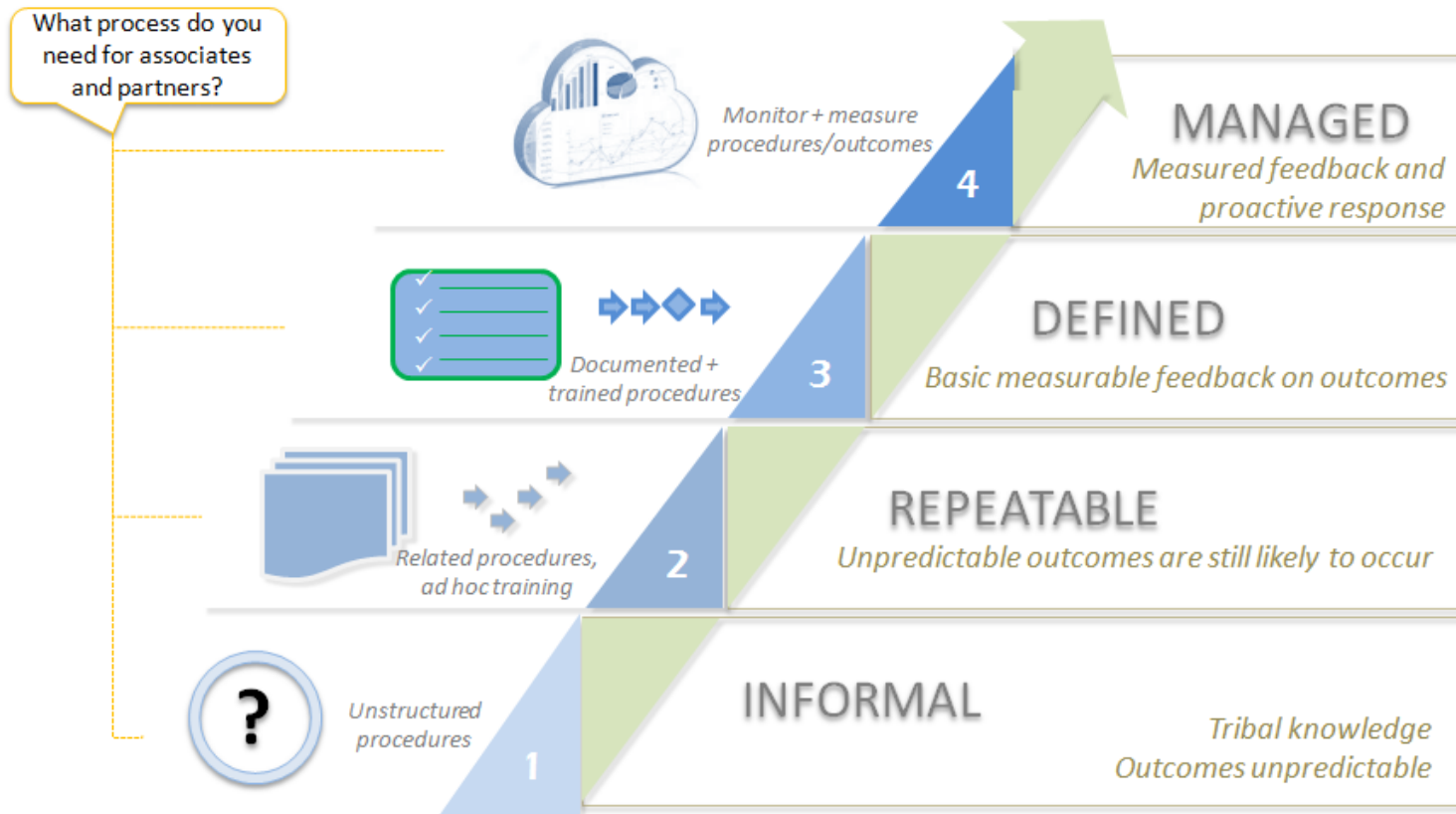
Focus on Our Core Mission

| Items | Description |
|--------------------------|--|
| 1. Checking Invoices | Checking to see if the vendor gets paid |
| 2. Check Request | If a contract says that it needs 50% of the invoice to be paid, Buyer will get and initiate that request |
| 3. CER Requests | Sometimes the Buyer starts or initiates the CER for the Customer |
| 4. Requisitions | Creating Requisitions On Behalf of the Customer |
| 5. ITRAQ Requests | Creating an ITRAQ for the customer |
| 6. Tracking down COI | Getting COI's for Corporate Insurance |
| 7. Redlines | Marking-up the language in contracts |
| 8. Working Outside Ariba | Allowing users and partners to work the process outside the system. |

STOP!



Confidence in Our Process



What You Did!

1. Standard Work Model
2. Universal Starting Point
3. Empowered the Buyer
4. Guaranteed Quality
5. Commitment to Data Stewardship
6. Essential Operational Reporting
7. Measure the “Whole” process
8. Reduced NVA work
9. Drive accountability
Buyer • Partner • Customers
10. Continuous Improvement Culture



Next Steps

1. “Operationalize” the new standard
2. Execute Data Remediation
3. Establish new Hoshin Plan (3-5 years)
4. Groom the backlog for phase-2
5. Engage Customers & Partners

| | Phase 1 | Phase 2 | Phase 3 |
|-------------------|---------|---------|---------|
| Procurement Focus | ● ● ● | ● ● ● | ● ● |
| Partners Focus | ● | ● ● | ● ● ● ● |
| Customers Focus | ● | ● ● | ● ● ● ● |

Questions?



Any Questions

Visibility into Procurement Life Cycle



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*Procurement is
Sparking Change*

Team Members:

**Myhanh Fallarino
Joel Roach
Teri Hernandez
David D'Addario**

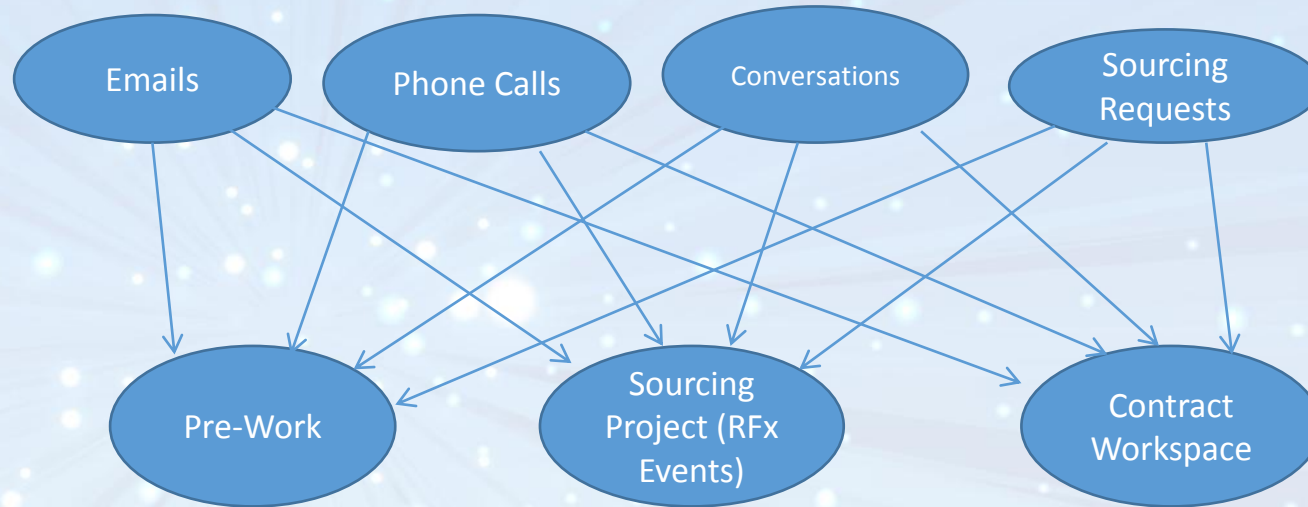
Expand/Enhance Review Task to PLC

Procurement Process



- SIPOC – Process
- Review Task was not Enough
- Expand (Bigger Picture)
- Consistency and Visibility across Tasks
- Change Process/ Incorporate into Ariba

Current State



- **No Story/Flow**
- **Only some tasks can be tracked**
- **Minimal visibility**

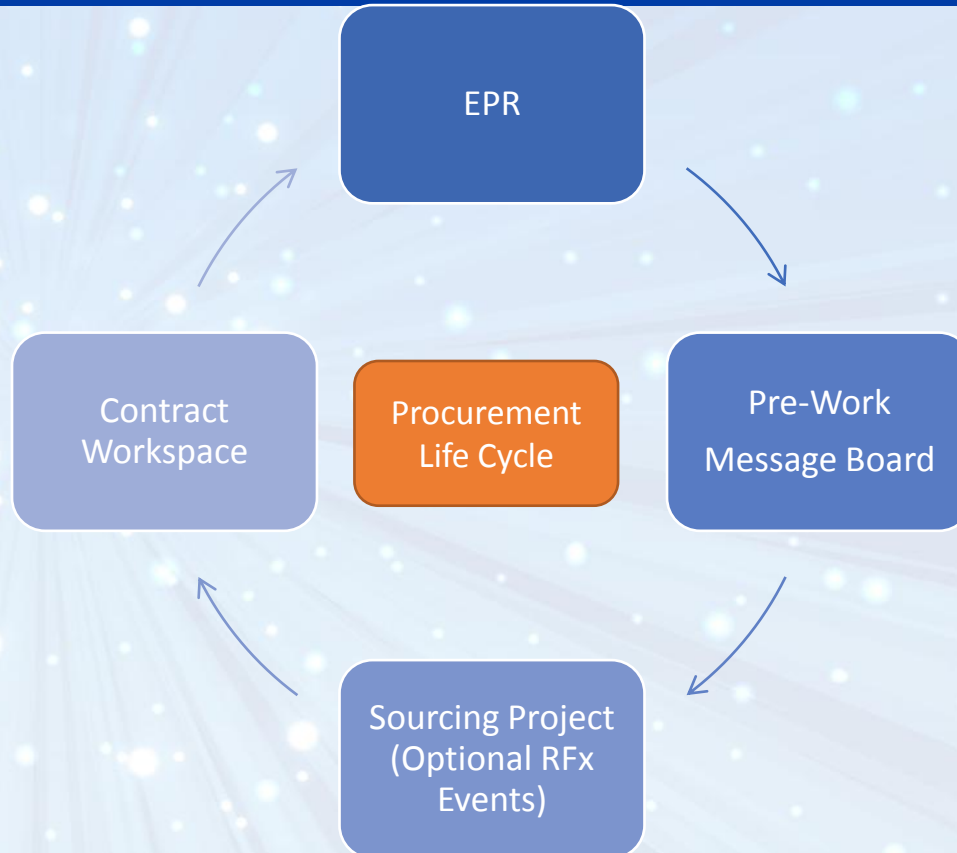
- **Inconsistency**
- **Workspaces are not linked to each other**

Visibility into Procurement Life Cycle

Goal: Provide End to End Visibility to Requesters, Management, and Internal Partners while creating consistency across all Buyers within the Procurement Organization.



Future State



Questions



Standard Operating Procedure



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Procurement is
Sparking Change

- Joel Roach
- Richard Ishmael
- Jim Parker
- David Vertner

Goal



Objective

Provide prescriptive instructions to ensure that work is processed correctly the first time.



The "Why"

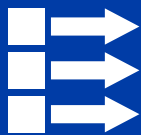
- Reduce data entry errors / omissions
- Reduce missing processing steps
- Reduce rework
- Increase consistency



Impact

- Increase customer confidence and trust in the process
- Improve partner & stakeholder satisfaction
- Enable more effective cross training & on-boarding

SOP Design Considerations



Common Format

- Mirrors the Ariba flow
- Facilitate ease of use



Easy Access

- Appian Platform
- Organized by process steps



Prioritized

- Phase – 1 (critical SOPs)
- Phase – 2

SOP Blueprint



Example – Table of Contents



Procurement

Table of Contents

| | |
|--|------|
| 1. How to Create a Sourcing Project – Accessories..... | 4 |
| 1.1 Purpose & Scope | 4 |
| 1.2 Process Summary | 4 |
| 1.3 Process Guide | 5-23 |
| 1.3.1 Standard Naming Convention | 7 |
| 1.3.2 Search Filters | 21 |

1. How to Create a Sourcing Request – Accessories

1.1 Purpose & Scope

This standard operating procedure focuses on Sourcing Requests specific to Accessories. Its purpose is to effectively and efficiently bid out accessories requests made by our internal customers. Therefore, any Buyer or Procurement staff creating a Sourcing Request of this type must follow the procedures identified herein.

1.2 Process Summary

The Process Summary referenced below will outline the basic steps in sequential order to complete this Sourcing Request. For a detailed explanation, please review the Process Guide.

1. Log into Ariba.
2. Click on "Create" Button on right.
3. Click on "Sourcing Project".
4. Add Name per Standard Naming Convention.
5. Add a short description of what you are sourcing.

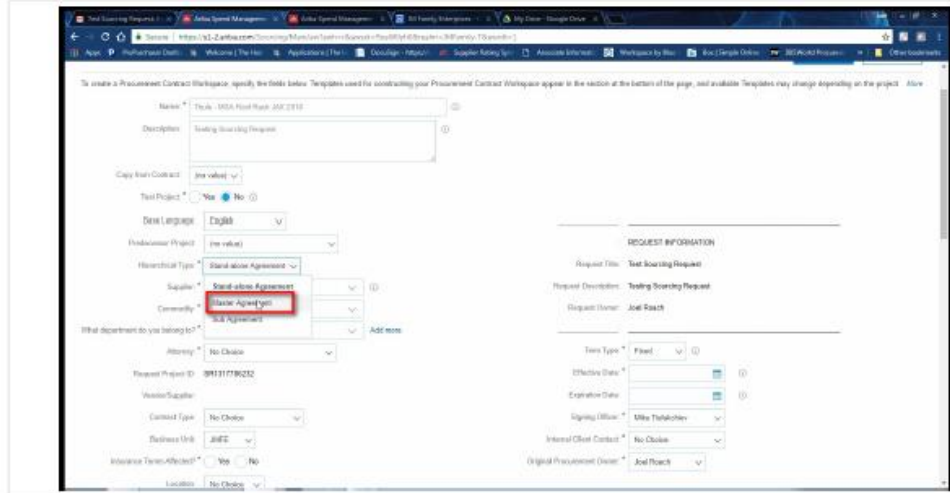
StepShot Example

Title →

Screen
Snap-shot →

Instructions →

Hierarchical Type



To create a Procurement Contract Workspace, specify the fields below. Templates used for constructing your Procurement Contract Workspace appear in the section at the bottom of the page, and available Templates may change depending on the project. [More](#)

Version *

Description

Copy from Contract

Test Project ☐ Yes ☒ No

Desk Language

Production Project

Hierarchical Type

Supplier

Commodity

What department do you belong to?

Attorney *

Request Project ID

Vendor Supplier

Contact Type

Business Unit

Intentional Terms Affected *

Location

REQUEST INFORMATION

Request Title

Request Description

Request Owner

Term Type

Effective Date

Expiration Date

Signing Office

Internal Client Contact

Original Procurement Owner

Select Master if the agreement type is MSA, PSA, TSRA, TSA, EULA, APPA or Subscription Agreement

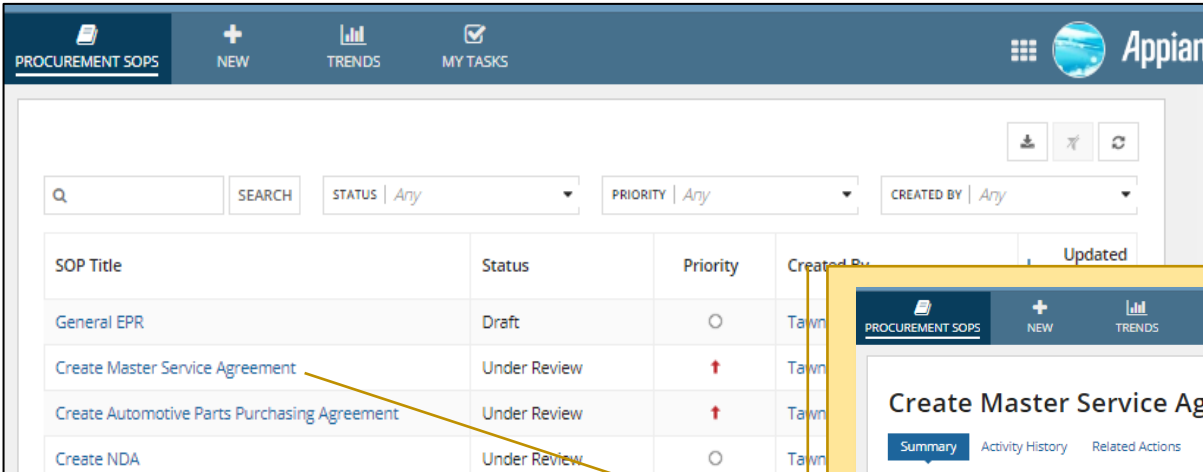
Select Stand Alone for an agreement that cannot have a sub-agreement e.g., NDA. This agreement has terms and conditions but will not govern any other agreement. An SOW is not a standalone agreement.

Select Sub-Agreement if the contract is governed by a Master agreement, For example, an SOW is a sub-agreement, i.e. MSA, etc.

SOP Repository & Access


SOPs stored in Appian

- Ease of Access
- Ease of Managing



The screenshot shows the Appian interface for the 'PROCUREMENT SOPs' repository. It includes a navigation bar with 'NEW', 'TRENDS', and 'MY TASKS' options. Below the navigation bar is a search and filter section with fields for 'Q', 'SEARCH', 'STATUS | Any', 'PRIORITY | Any', and 'CREATED BY | Any'. The main content area displays a table of SOPs with columns for 'SOP Title', 'Status', 'Priority', 'Created By', and 'Updated'.

| SOP Title | Status | Priority | Created By | Updated |
|--|--------------|----------|------------|---------|
| General EPR | Draft | ○ | Tawn | |
| Create Master Service Agreement | Under Review | ↑ | Tawn | |
| Create Automotive Parts Purchasing Agreement | Under Review | ↑ | Tawn | |
| Create NDA | Under Review | ○ | Tawn | |



The screenshot shows the 'Create Master Service Agreement' form in the Appian interface. It includes a navigation bar with 'NEW', 'TRENDS', and 'MY TASKS' options. The form has tabs for 'Summary', 'Activity History', and 'Related Actions'. The 'Summary' tab is active, showing details for the SOP. The form includes fields for 'SOP Title', 'Key Topics', 'SIPOC', 'SOP Owner', 'Roles', 'Created By', 'Created On', 'Operational Metrics', 'Training Level', 'Status', 'Priority', 'Updated By', and 'Updated On'. There are also buttons for 'UPDATE RECORD', 'SEND TASK', and 'DELETE PROCUREMENT SOP'. At the bottom, there is an 'Attachments' section with a table for file uploads.

| File | Uploaded On |
|---|-------------|
| Creating a Master Service Agreement.pdf | 9:48:28 AM |

Questions?



Any Questions

Operational Reporting



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Sparking Change*

Team Members:

Richard Ishmael
Teddy Artemiou
Michael Benishek
Michael Crapp
Tiffany Hughes
Teri Hernandez

Short story before we begin



The process takes too long!



Really?



**Where is my stuff?
Why is it so hard to get status?**



It's with "Procurement"!

Workstream Objectives



1. Provide dynamic reporting dashboard on the Procurement Life Cycle to provide
 - Visibility
 - Transparency
 - Awareness
2. Define report styles based on roles
 - VPs and above
 - Directors
 - Managers
 - Requesters/Customers
3. Determine future cadence for releases to address
 - Fixes
 - Enhancements
 - New Customer Requests

Lessons Quickly Learned

Can't boil the ocean in 9 weeks!



Reporting Limitations



- ❖ Ariba can provide static reporting but does not allow you to drill down from a report table, graph or provide detail on hover
- ❖ Ariba cannot join multiple tables and present a consolidated view
- ❖ Ariba cannot calculate number of days between a start and end date

Phase 1 Accomplishments



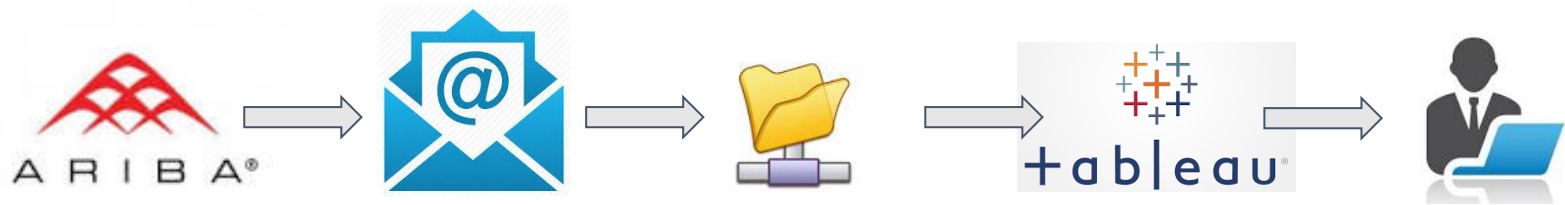
- ❖ Identified the customers that would benefit the most from our Phase 1 report
 - Facilities, IT, PMO

- ❖ Created Phase 1 report layout
 - captured customer requirements
 - mapped these requirements to data points in Ariba

- ❖ Explored tools to report on the Ariba data
 - Appian, Cognos, Excel, SharePoint, **Tableau**

Phase-1 Manual vs. Phase-2 Automated

Phase 1



Phase 2



Phase-1 Report



- [Phase 1 Report \(v1.0\)](#)

Lunch

30 minute lunch break

Change Management



Change Management Team

Teddy Artemiou
Jane Kaufman
Celeste Fouty
Jim Parker
Aristeus Johns

Change Management Initiative



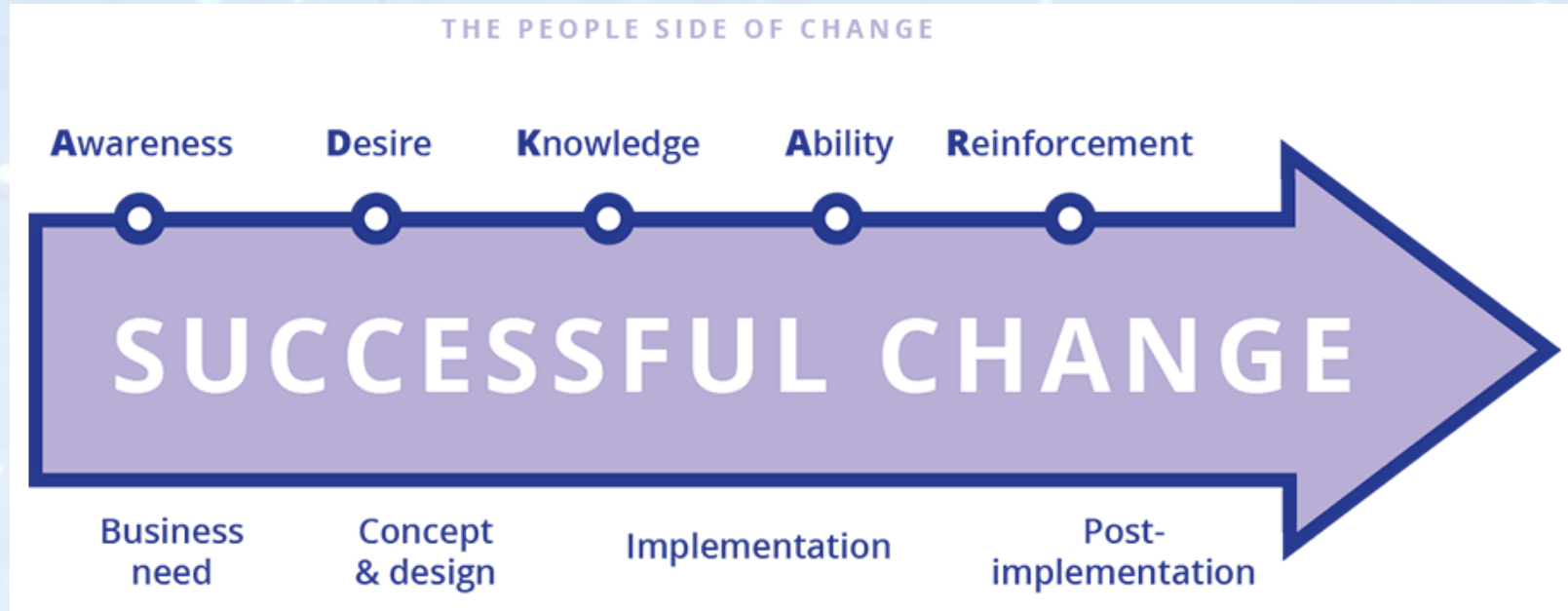
- Objective - internal and external focus
- Goal – reduce resistance and provide clarity to the purpose and intent of the transformation

“Associates are our most important asset”

- Benefits – increase trust in our brand and improve the chances for success


Change Management Approach

- Use ADKAR approach to usher in the change



Complexity Assessment

- Three areas assessed to determine complexity – the characteristics of the change, the impacted to associates and leadership support
- Results - medium complexity project



Early Change Complexity Assessment

Enterprise Business
Process Office

CHANGE CHARACTERISTICS ASSESSMENT

Project/Initiative Name

High-level description of the changes that will result from this project/initiative

The procurement process is unreliable, takes too long, and provides little visibility. Customers engage with the procurement process in a myriad of ways and the process is not executed in a consistent or standard manner. Additionally, the support system intended to enable the process (i.e., Ariba) is not optimally configured to provide robust orchestration, control, measurement, or visibility.

The Procurement department will launch a department-wide transformation initiative to correct the process and satisfy customers. Procurement will focus on understanding customer expectations, defining standard processes, and establishing a performance baseline and targets. We will strengthen our interfaces with partners and ultimately reduce errors and rework.

Think it through: Consider the scope of the changes. What will be impacted?

| | | | | |
|----------------------|-----------------------|-------------------|----------------------------|--------------|
| • Processes | • Policies/Procedures | • Job Roles | • Associate Compensation | • Customers |
| • Systems/Technology | • Data/Information | • Staffing Levels | • Organizational Structure | • Compliance |

What we are doing?

- Developed a project brand and re-faced our HUB space
- Completed a stakeholder assessment
 - Determined impact of change to different groups
 - Determined training strategy for each group
- Develop a communication and training plan
- Complete surveys
 - Internal survey completed
 - External pulse survey to be distributed this week

CELEBRATE



- March 2nd WAWA Milkshakes
- March 16th celebrated the kick off with a Mocktail party
- March 19th celebration lunch at Cracker Barrel for the JAX team
- March 30th celebrated the first month of the project with a tie dye party
- April 5th celebrated a long week with the Ariba resource by having a department lunch
- April 20th celebrated big push to complete testing by having a “Make your own Sundae” event
- More to come as we GO LIVE.....

CELEBRATE





Quality Assurance

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Goal



Objective

Prevent downstream errors and reduce costly rework



The “Why”

- Eliminate passing data entry errors / omissions downstream
- Eliminate missed processing steps
- Increase consistency



Impact

- Elevate team performance
- Improve process control and governance
- Increase customer confidence and trust in the process
- Improve partner & stakeholder satisfaction

Quality Assurance

Process improvement efforts should continuously strive to improve quality outcomes

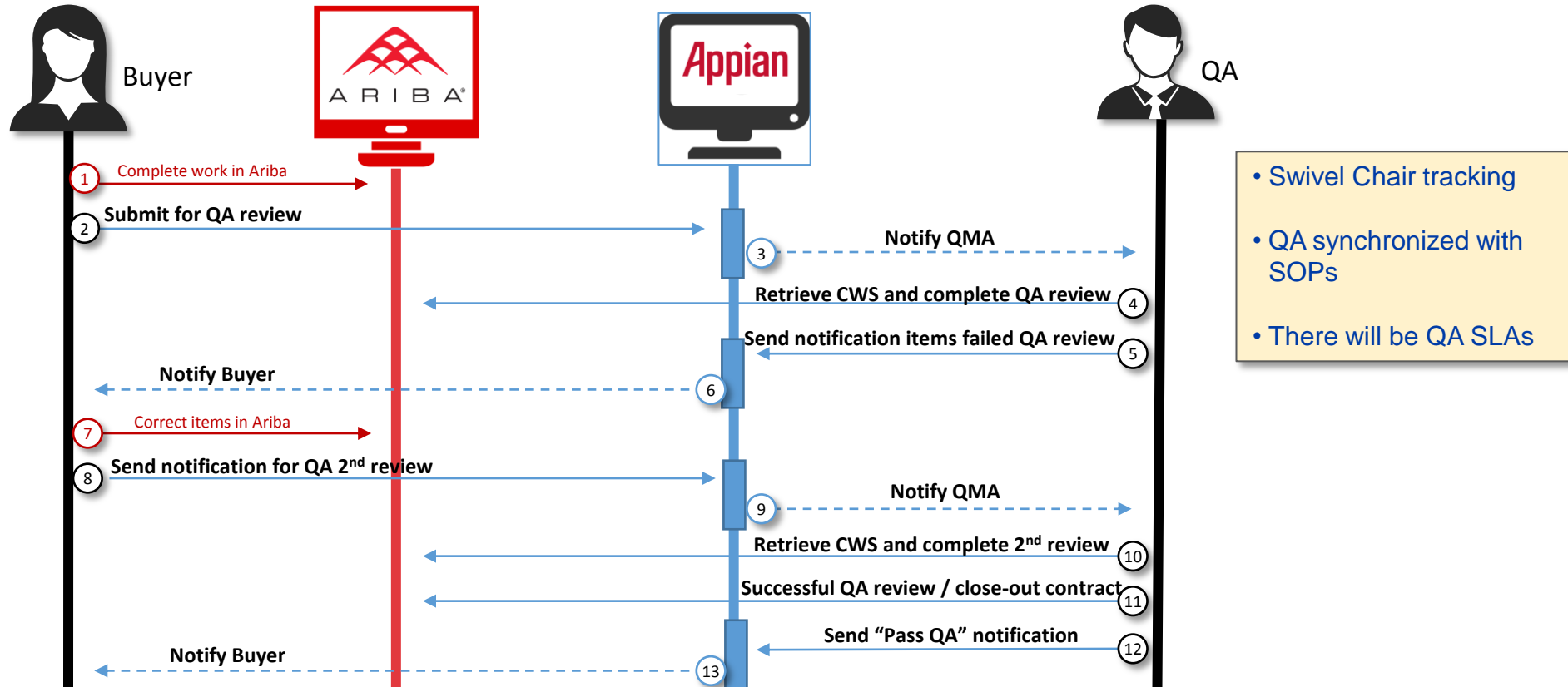


- * A strategy of problem prevention – focus on the “process”
- * An efficient and repeatable process leads to better work products
- * QA is everyone’s responsibility

Quality Assurance Workflow



Swivel Chair QA



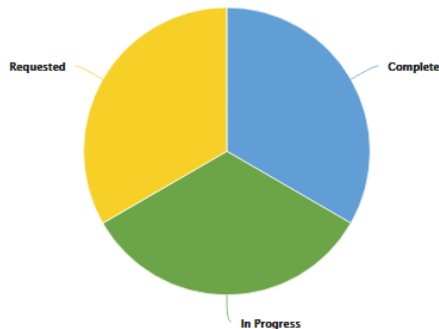
Swivel Chair QA

| QA REVIEWS | | | | |
|---|-------------|----------|----------------|------------|
| <div> <div>✓</div> <div>+</div> <div>TRENDS</div> <div>MY TASKS</div> </div> <div> <div>Appian</div> </div> | | | | |
| <div> <div>Q</div> <div>SEARCH</div> <div>STATUS Any</div> <div>PRIORITY Any</div> <div>CREATED BY Any</div> </div> | | | | |
| QA Review title | Status | Priority | Created By | Updated On |
| Review #2 | Requested | ⚠ | Tawna Lawrence | 1:12:10 PM |
| Review #1 | Complete | ○ | Tawna Lawrence | 1:11:54 PM |
| Review #3 | In Progress | ○ | Tawna Lawrence | 1:10:37 PM |

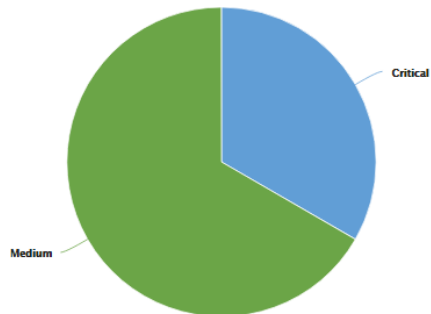
Add New QA Review

| | |
|--|--|
| QA Review title * | Parent Project ? |
| <input type="text" value="Copy/Paste contract workspace title"/> | <input type="text" value="--- Select a Value ---"/> |
| Status * | Published |
| <input type="text" value="--- Select a Value ---"/> | <input type="text" value="--- Select a Value ---"/> |
| Priority | Supplier |
| <input type="text" value="--- Select a Value ---"/> | <input type="text" value="--- Select a Value ---"/> |
| QA REVIEW STARTED | Affected Parties |
| <input type="text" value="mm/dd/yyyy"/> | <input type="text" value="--- Select a Value ---"/> |
| Hierarchy Type | Commodity |
| <input type="text" value="--- Select a Value ---"/> | <input type="text" value="--- Select a Value ---"/> |
| Expiration Date | Term Type |
| <input type="text" value="--- Select a Value ---"/> | <input type="text" value="--- Select a Value ---"/> |
| Email Notification Days | Amendment selected as contract type ? |
| <input type="text" value="--- Select a Value ---"/> | <input type="text" value="--- Select a Value ---"/> |
| Expiration Reminder Sent in Days | Check if it changes terms of an agreement |
| <input type="text" value="--- Select a Value ---"/> | <input type="text" value=""/> |
| Notice Period Days | SR# |
| <input type="text" value="--- Select a Value ---"/> | <input type="text" value=""/> |
| Notice Email Recipient | SP# |
| <input type="text" value="--- Select a Value ---"/> | <input type="text" value="(if needed)"/> |
| Notice Email Notification in Days | Shortcut |
| <input type="text" value="--- Select a Value ---"/> | <input type="text" value="to executed doc on SR"/> |
| Notice Reminder Sent in Days | Rejection Comments |
| <input type="text" value="--- Select a Value ---"/> | <input type="text" value="Describe the reason one or more items didn't pass the QA review"/> |

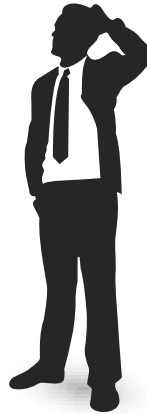
QA Reviews by Status



QA Reviews by Priority



Questions?



Any Questions

Visibility into Procurement Life Cycle



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*Procurement is
Sparking Change*

Team Members:

**Myhanh Fallarino
Joel Roach
Teri Hernandez
David D'Addario**

E-Procurement Request (New Look)



One Point of Entry for All Requesters

Create Sourcing Request Create Cancel

To create a Sourcing Request, specify the fields below. Templates used for constructing your Sourcing Request appear in the section at the bottom of the page, and available Templates may change depending on the project attributes you enter.

Name: Translations ⓘ

Description: Translations ⓘ

Copy from Project:

Test Project: * ☐ Yes ☐ No ⓘ

Base Language:

Predecessor Project: ⓘ

Are you Requesting on behalf of someone else? * ☐ Yes ☐ No

Signing Officer:

Is there a supplier already selected? * ☐ Yes ☐ No

What department do you belong to?

Requester: ⓘ

Procurement Associate: *

Currency:

FINANCIAL

GENERAL INFORMATION

Select a template

Select the template you want to use, and answer any questions related to it to create your project. How you set the fields in the section above

- ☐ General E-Procurement Request
- ☐ IT E-Procurement Request

- **Eliminated D-Forms**
- **Consistency across all Buyers**
- **Department Drives Conditions/Workflows**
- **Error proof for Requesters**
- **Short cut to Executed Contract**
- **Automation on Approval Workflows**

E-Procurement Request New Look



Visibility for Requesters

Overview

Actions

Tasks

Actions

ID: SR1313126227 ⓘ

Version: Original

Project Status: Gray

GENERAL INFORMATION

Requester: Myhanh Fallarino ⓘ

Signing Officer: No Choice

Process Status: No Choice ⓘ

Project State: Active ⓘ

Procurement Associate: Myhanh Fallarino

Due Date: ⓘ

FINANCIAL

Test Project: Yes ⓘ

Base Language: English

Currency: US Dollar

Access Control: (no value) ⓘ

Are you Requesting on behalf of someone else?

Is there a supplier already selected? No

Business Unit: No Choice

Description: ⓘ

Team:

Myhanh Fallarino

Approval for E-Procurement Request * ▾

* Indicates required task

Documents

Actions

Shortcut to MSA_072309_EXEC MF (11008).pdf ▾

Published

Customer Supporting Documents ▾

Amendment to Subscription Agreement(04.13.17) v1 TS ▾

Draft

🔒

NDA for Diversified Maintenance 110115 V1 ▾

Draft

🔒

Procurement Process ▾

Myhanh Test 6 ▾

Not Created

Create Sourcing Project -

Not Created

Announcements

New

Details

email2workspace-prod+JMFfamily-T+SR1313126227+dple@ansmtp.ariba.com

4/21/2018

Myhanh Fallarino

Need More Data

4/21/2018

Myhanh Fallarino <myhanh.fallarino@jmfamily.com>

Drafting up Scope of Services to Review with Customer

4/21/2018

Myhanh Fallarino

Meetings with Customer

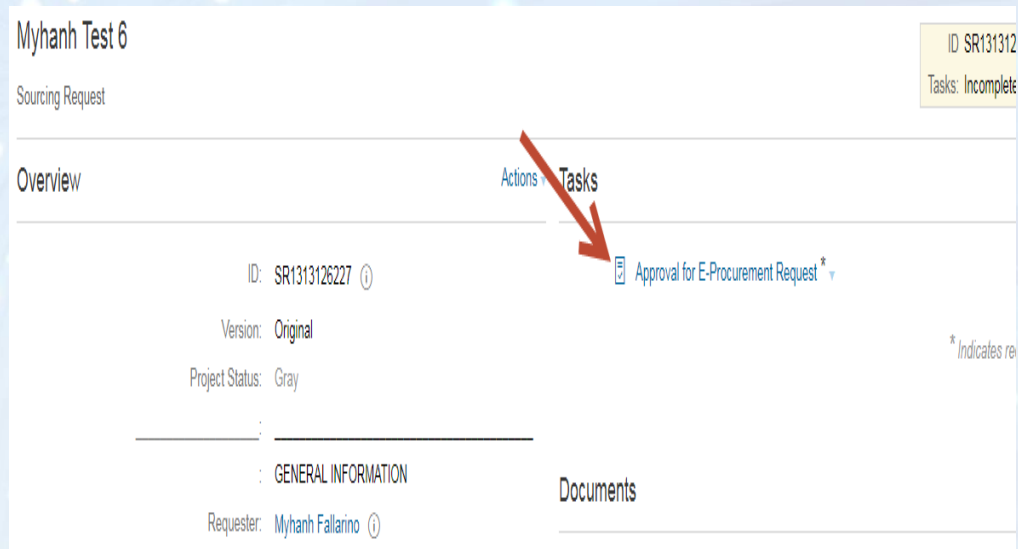
4/21/2018

Myhanh Fallarino

EPR General Approval Workflow

Changes to EPR Workflow:

- Eliminated Procurement Review
- Added an Approval Workflow for Buyers to Approve/Deny Requests
- Completion of one workflow automatically starts another
- One e-mail notification for EPR



The screenshot displays the 'Myhanh Test 6' Sourcing Request page. The 'Overview' tab is active, showing details for ID: SR1313126227. A red arrow points to the 'Approval for E-Procurement Request' task, which is marked as incomplete. The page also shows the 'Actions' and 'Tasks' tabs, and a 'Documents' section at the bottom.

Myhanh Test 6

Sourcing Request

ID: SR131312
Tasks: Incomplete

Overview

Actions Tasks

ID: SR1313126227 ⓘ

Version: Original

Project Status: Gray

* Indicates re

GENERAL INFORMATION

Requester: Myhanh Fallarino ⓘ

Documents

EPR IT Approval Workflow

Process Change to IT Approval Workflow

- **IT Planning Review – Capability to Approve or Deny**
- **Automatic Workflow to IT Procurement**
- **Buyer has capability to Approve or Deny Requests**
- **Capability to add Requester in IT Procurement Workflow**

IT E-Procurement Request

Sourcing Request

[Overview](#) [Conditions](#)

Properties

Actions ▾ Tasks

Name: IT E-Procurement Request ⓘ

Description: ⓘ

Version: v2

ID: SR1308990607 ⓘ

⌚ Approval for IT Business Office * ▾

⌚ Approval for E-Procurement Request * ▾

Message Board

Pre-Work Prior to Contract Workspace

- Meetings
- Demos
- Site Visits
- Negotiations
- Preparations of Scope of Services/Requirements
- E-mail strings w/Partners, Customers, Vendors, Outside Counsels, etc.

Overview

Actions ▾

Tasks

ID: SR1313126227 ⓘ

Version: Original

Project Status: Gray

GENERAL INFORMATION

Requester: Myhanh Fallarino ⓘ

Signing Officer: No Choice

Process Status: No Choice ⓘ

Project State: Active ⓘ

Procurement Associate: Myhanh Fallarino

Due Date: ⓘ

FINANCIAL

Test Project: Yes ⓘ

Base Language: English

Currency: US Dollar

Access Control: (no value) ⓘ

Are you Requesting on behalf of someone else?

Is there a supplier already selected? No

Description: ⓘ

Team:

Myhanh Fallarino

Approval for E-Procurement Request * ▾

* Indicates required task

Documents

Actions

Customer Supporting Documents ▾

Amendment to Subscription Agreement(04.13.17) v1 TS ▾ Draft ⓘ

NDA for Diversified Maintenance 110115 V1 ▾ Draft ⓘ

Procurement Process ▾

Myhanh Test 6 ▾ Not Created

Create Sourcing Project ▾ Not Created

Announcements

New Details

email2workspace-prod+JMFfamily-T+SR1313126227+dple@ansmtp.ariba.com 4/21/2018 Myhanh Fallarino

Drafting up Scope of Services to Review with Customer 4/21/2018 Myhanh Fallarino

Meetings with Customer 4/21/2018 Myhanh Fallarino

Welcome to the project! 4/21/2018 Myhanh Fallarino

Contract Workspace

Changes:

- **Compact View Only**
- **Eliminated phases**
- **Simple Tasks**
- **Provide shortcut to executed contract**
- **Review/Approval Task**
- **Creating Predecessor Project (only if SP was created)**

Myhanh PLC Test

Contract Workspace (Procurement)

Overview

Contract ID: CW2008991

Contract Status: Draft

Version: Original

Owner: Myhanh Fallarino ⓘ

Test Project: Yes ⓘ

Commodity: Facilities management 811... [View more](#)

Base Language: English

Departments: 8 Facilities

Access Control: (no value) ⓘ

Description: ⓘ

Team:

Myhanh Fallarino; JMFE Procurement; JMFE Facilities; JMFE Legal;

Actions ▾ Tasks

⌚ Review/Approval for Agreement * ▾

⌚ Signature for Agreement * ▾

⌚ Signature Task Complete ▾

Documents

📁 Fully Executed Agreement ▾

📁 Agreement ▾

📁 Other Documents ▾

Review/Approval Task

Changes:

- Remove Review Task
- Combined Review/Approval into one Task
- Reviewers/Approvers can Approve or Deny
- Buyers are included throughout process
- Buyers can add more value
- No confusion on versions
- Eliminating potential errors for Requesters
- Frequency and # of days are tracked
- Simple contracts will flow quickly


Approval Task

This task requires approval on one or more documents. Prior to submitting this task, documents must be ready for


Myhanh PLC Test / [Review/Approval for Agreement](#)

TSK1306559787 Review/Approval for Agreement





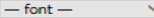



Serial flow of approvers with Project Owner in the flow to add Ad Hoc approvers if needed.

1.  Agreement (Read Only)

2. Specify Due Date

☐ Days after parent phase starts: None ⓘ
☒ Fixed Date: 

3. Provide an initial message and click Submit

 **B** *I* U       

Additional Attachments...

4.

Questions



Break

15 minute break

What's in the Box?

1. Split up into 3-4 groups.
2. Select an item from the box.
3. Meet as a team for 15 minutes.
 - Itemize the positive attributes and features of your object
 - Itemize the functional (or decorative) purpose of your object
 - Establish a statement of value for the object
(i.e., *"The object has value because..."*)
 - Outline the reason(s) someone should buy the object from your team
 - Develop a quick 2-3 minute ad (or a commercial skit) for your object
4. When called upon, your team will make it's **most compelling** case to have the other groups buy your object.