

Initiator Implementation Plan

Form Changes and Communications

Form	Change(s)	Communication Plan
Purchase Requisition	<p>Capture the Initiator name, replacing the term Requisitioner on the form.</p> <p>Capture the Preparer and Approver on the bottom of the form, along with any supplemental approver (e.g., department chair) for requisitions over \$100,000.</p> <p>Note that the Initiator can be captured once for the entire requisition or on a per line item basis.</p>	<p>Publish new form on Policies and Procedures site week of February 4.</p> <p>Distribute e-mail to all Requisition Approvers and Business Managers week of February 4.</p>
Check Request	<p>Captures the name of the Initiator, in addition to the Approver.</p>	<p>Publish new form on Policies and Procedures site week of February 4.</p> <p>Distribute e-mail to all Disbursement Approvers and Business Managers week of February 4.</p>

System Changes: January – March 2008

System	Change(s)	Communications
SciQuest	<p>Beginning week of February 4, SciQuest requisitioners will receive a warning message that Initiator will become a required field in March 2008.</p> <p>Beginning week of February 4, SciQuest Initiator data will be imported to Oracle.</p> <p>Beginning March 2008, Initiator will be required in SciQuest. Users will not be able to submit or approve a SciQuest requisition without providing an Initiator. (We will monitor Initiator usage to determine whether we make the data required as of March 1 or later in the month.)</p>	<p>Send e-mail to all SciQuest users and Business Managers week of February 4, notifying them of change and provide links to updated self-paced module to capture Initiator on SciQuest profile and requisitions.</p> <p>Send follow-up e-mail(s) to all SciQuest users prior to making Initiator required in March.</p>
Web Invoice Payment	<p>Beginning week of February 4, Web Invoice Payment (WIP) users will have ability to capture Initiator. Initiator will be optional, but prompt will indicate</p>	<p>Send e-mail to all WIP users and Business Managers week of February</p>

	<p>“Required as of March 2008.”</p> <p>Beginning week of February 4, WIP Initiator data will be imported to Oracle.</p> <p>Beginning March 2008, Initiator will be required in WIP. Users will not be able to submit or approve a WIP invoice without providing an Initiator. (We will monitor Initiator usage to determine whether we make the data required as of March 1 or later in the month.)</p>	<p>4, notifying them of change.</p> <p>Send follow-up e-mail(s) to all WIP users prior to making Initiator required in March.</p>
Procurement Inquiry	<p>Beginning week of February 4, invoices and purchase orders that have Initiator data captured will display it.</p> <p>If an invoice is matched to a purchase order that has captured the Initiator, the invoice will display the purchase order’s Initiator.</p> <p>Beginning week of February 4, Procurement Inquiry will also display the Preparer for Web Invoice Payments created on or after that date.</p>	<p>Publish an article on the Procurement web site describing the Procurement Inquiry changes.</p>

System Changes: April – June 2008

<i>System</i>	<i>Change(s)</i>	<i>Communications</i>
Expense Management System (EMS)	<p>The name of the Preparer of the EMS record will be passed to Oracle and displayed in Procurement Inquiry.</p> <p>If a purchase is made on behalf of someone else, the EMS user can note the Initiator name in the EMS Item Comment.</p>	<p>Send e-mail to all EMS users and Business Managers describing how they would update Item Comment to identify the Initiator for orders placed on behalf of others.</p>
OK to Pay Invoices Imported From Processing Services	<p>Invoice processing services will capture Initiator data on OK to Pay invoices. The data will be passed to Oracle and displayed in Procurement Inquiry.</p>	<p>Send e-mail to Business Managers and all Disbursement Approvers emphasizing the importance of capturing Initiator on OK to Pay invoices.</p>
Financial Reporting	<p>After changes are in place to capture Initiator, Preparer, and Approver on transactions, the Data Warehouse and associated reports will be modified to make the data available.</p>	<p>Send e-mail to Business Managers and Data Warehouse users describing the data and report changes.</p>