

P2P: Procure to Pay Automation Project

The P2P Procure to Pay Automation Project is part of the system wide Administrative Transformation Project. The goal of the project is to increase automation and standardization in the purchasing process across UW system.

The system will be **ShopUW+** although as you can see below it is much more than just a new iteration of ShopUW+. This cloud-based system will automate workflows and eliminate paper transactions. Visit the P2P website [here](#).

Phase One is launching April 16, 2021.

The following table explains some of the changes that are coming and compares the current and future state of the processes.

Current Name	Future Name	Current Format	Future Format
Shop@UW	ShopUW+	Limited to eCommerce	Requisitions PO's Contracts Sourcing Electronic Invoicing Accounts Payable
DP Direct Payments	Form	Paper and Signatures	Electronic form with workflow approvals
PIR Payment to Individual	Form	Paper and Signatures	Electronic form with workflow approvals
Purchased Services Form	Form	Paper and Signatures	Electronic form with workflow approvals
Sole Source Justification	Form	Paper and Signatures	Electronic form with workflow approvals
Contract Search Tool	Contract Module	Web Lookup	Searchable Integrated with requisitions Phase 2 - electronic workflow approvals
W9	W9	Paper or FAX	Phase 2 - vendor submission through electronic portal
Insurance certificate	Insurance certificate	Paper or FAX	Phase 2 - vendor submission through electronic portal

Basic Roles

Every employee will automatically be a Shopper. Shoppers can choose and put items to purchase in their ecommerce shopping cart or create requests for items and send to a Requester to submit requisitions.

Each unit will identify a "Requester" who will review all requests for their unit. The Requestor will be responsible for choosing the funding strings and ensuring unit purchasing policy is adhered to. The Requester completes the order or requisition and submits.

A Requester has the authority to purchase up to \$100 of items from a ShopUW+ catalog vendor without additional approvals. If the item is over \$100, the request is forwarded to the Approver.

The Approver will review the purchase, the funding string, and approve the purchase.



Shopper	Requester	Approver
▪ Responsible for shopping for goods and services, creating carts, and assigning carts to Requesters. • Limited user access outside of shopping functionality and purchasing permissions • Automatically assigned to every UW Employee • Do not need to know funding string	▪ Responsible for reviewing and submitting requisitions for approval. • Finalizing accounting/shipping information, providing attachments and submitting requisitions for approval • Must complete required funding string information • A natural progression from the shopper role	• Responsible for reviewing all requisitions submitted for their specific approval • May be allowed to approve, return, reject, forward, or add comments to requisition

There may be additional Roles based on the cost or type of item.

Training and User Support

The Project team is creating training for all users of the new system. This [video](#) provides an overview on the support users can expect from the project team.

- 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

Workflows

Business Process workflows are critical to any process improvement. As each process is rolled out, the project team will also provide process workflows.

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