



Procurement Process Improvement Project Action Plan Status Report

Monday, December 15, 2014

Action	Responsibility	Due Date	Status	Completion Date	Notes
1. Training Modules					
a. commodity codes	Eileen	11/30/2014	Cancel	N/A	no need due to eprocurement system implementation
b. vendor numbers	Eileen	11/30/2014	Cancel	N/A	no need due to eprocurement system implementation
c. procurement process (3 bid transfer to procurement)	Carsten	11/30/2014	Cancel	N/A	no need due to eprocurement system implementation
d. financial training	Eileen	12/31/2014			
e. OnBase	Lynn	11/30/2014	Complete	11/21/2014	OnBase will be utilized for electronic distribution of purchase orders. Email communication sent out on November 21, 2014. Users are provided with OnBase online training link. Training sessions (7) being provided in December 2014 and January 2015.
2. Implement/Expand Use of Docusign					
3. Update and implement e-form for vendor	Stephanie	12/31/2014	Cancel		no need due to eprocurement system implementation <small>see attachment</small>
4. Create new standardized form to initiate requisitions	Milena	11/1/2014	Complete	11/24/2014	new form posted to online library <small>see attachment</small>
5. Document new process	Karen/Laura	9/30/2014	Cancel	N/A	no need due to eprocurement system implementation <small>see attachment</small>
6. Reporting Analysis Project Team	AI	9/30/2014	Complete	9/30/2014	Visio document: current and future state
	Ayçe	12/31/2014			
a. Develop a systematic approach for institution-wide spend analysis (proactive management of suppliers)					
b. Develop methodology to measure savings, bottlenecks in the process, etc					
c. Dashboards/Reporting					
d. Review of data points (vendors, commodity codes)					
7. Automatic sorting and electronic distribution of purchasing records and implement ebid	Carsten	11/15/2014	Complete	11/15/2014	Purchasing records to be distributed electronically instead of paper form. Procurement internal workload distribution.



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8. Implement OnBase for electronic distribution of procurement documents	Lynn	11/15/2014	In progress	1/5/2015	POs to be distributed electronically instead of paper form effective January 5, 2015. Announcement sent out on November 21, 2014. OnBase being utilized for this purpose. Departments have been receiving electronic documents in addition to paper forms since November 1, 2014. Training sessions (7 sessions) being provided in December and January. On an annual basis, 68K copies of POs are printed, physically distributed and stored ^{see attachment for} communication
9. Email notice of intent	Carsten	9/18/2014	Complete	9/18/2014	For informal and formal bids, notice of intent is sent to all bidders when a bid other than lowest is chosen. The purpose of notification is to acknowledge all bidders of the award recipient, reasons for the choice and their rights to protest. This was mailed or faxed to all bidders (procurement 5 business days/year). Effective September 2014, to be emailed to the bidders (procurement 0.6 business days/year) ^{see attachment for calculations}
10. Set County standards for minimum approval levels	Pat	12/31/2014			

Action # 3

EMPLOYEE / VENDOR MAINTENANCE Form 3701 R6

INSTRUCTIONS: Use this form to request Employee or Vendor number additions (new), changes or deletions. Type or print legibly. Form must be completed in full or number will not be issued. Allow two weeks lead time whenever possible. To avoid errors, also email backup that shows the Vendor's name and address.

The selection of the "Vendor Type" in the check boxes below, determines where completed form should be emailed.

ACCOUNTS PAYABLE: ap@milwaukeecountywi.gov

PROCUREMENT: procurement@milwaukeecountywi.gov

TYPE OF REQUEST: (Please select one)	VENDOR TYPE (Your selection determines where completed form should be sent)	
	EMAIL TO ACCOUNTS PAYABLE	EMAIL TO PROCUREMENT
<input type="checkbox"/> New <input type="checkbox"/> Name Change <input type="checkbox"/> Other Change <input type="checkbox"/> Delete	<input type="checkbox"/> Attorney <input type="checkbox"/> Employee Travel or Mileage <input type="checkbox"/> Contractors <input type="checkbox"/> Health Care Provider <input type="checkbox"/> Rent Assistance <input type="checkbox"/> Professional Services <input type="checkbox"/> Other _____	<input type="checkbox"/> RX, PC or PG <input type="checkbox"/> PD Check above when Vendor # will be used on Advantage purchasing documents (RX, PC, PD, PG)
VENDOR #: (if Change or Delete)		

Vendor or Employee Name:		
Employee Org. Unit: (if requesting Employee #)	Employee Location: (if requesting Employee #)	
Vendor Tax ID Number:	Vendor Email Address: (if applicable)	
Vendor Address:		
Vendor City:	Vendor State:	Vendor Zip:
Vendor Contact Person: (if applicable)		
Vendor Phone Number:	Vendor Fax Number:	
Nature of Vendor's Business: (if you don't know, briefly tell us what you intend to buy from this vendor)		
Comments:		

INFORMATION ABOUT THE PERSON COMPLETING THIS FORM

Your Name:		Your Department:
Date:	Your Phone #:	Location:

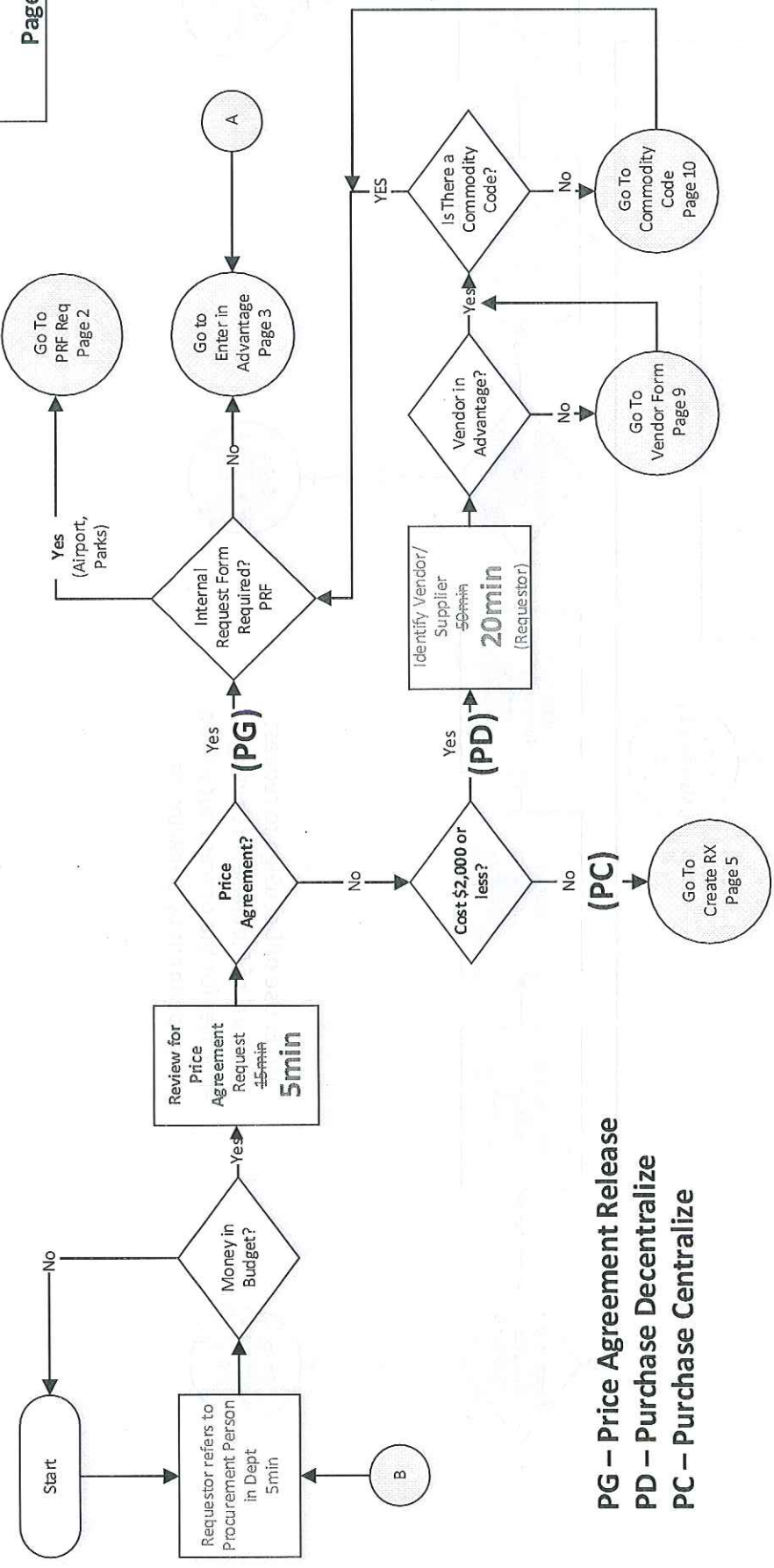
FOR ACCOUNTS PAYABLE/PROCUREMENT USE ONLY

Vendor #:	Date Entered into Advantage:	Entered By:
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For OWA and NON-Microsoft Outlook users, please "Save as..." and email as an attachment.

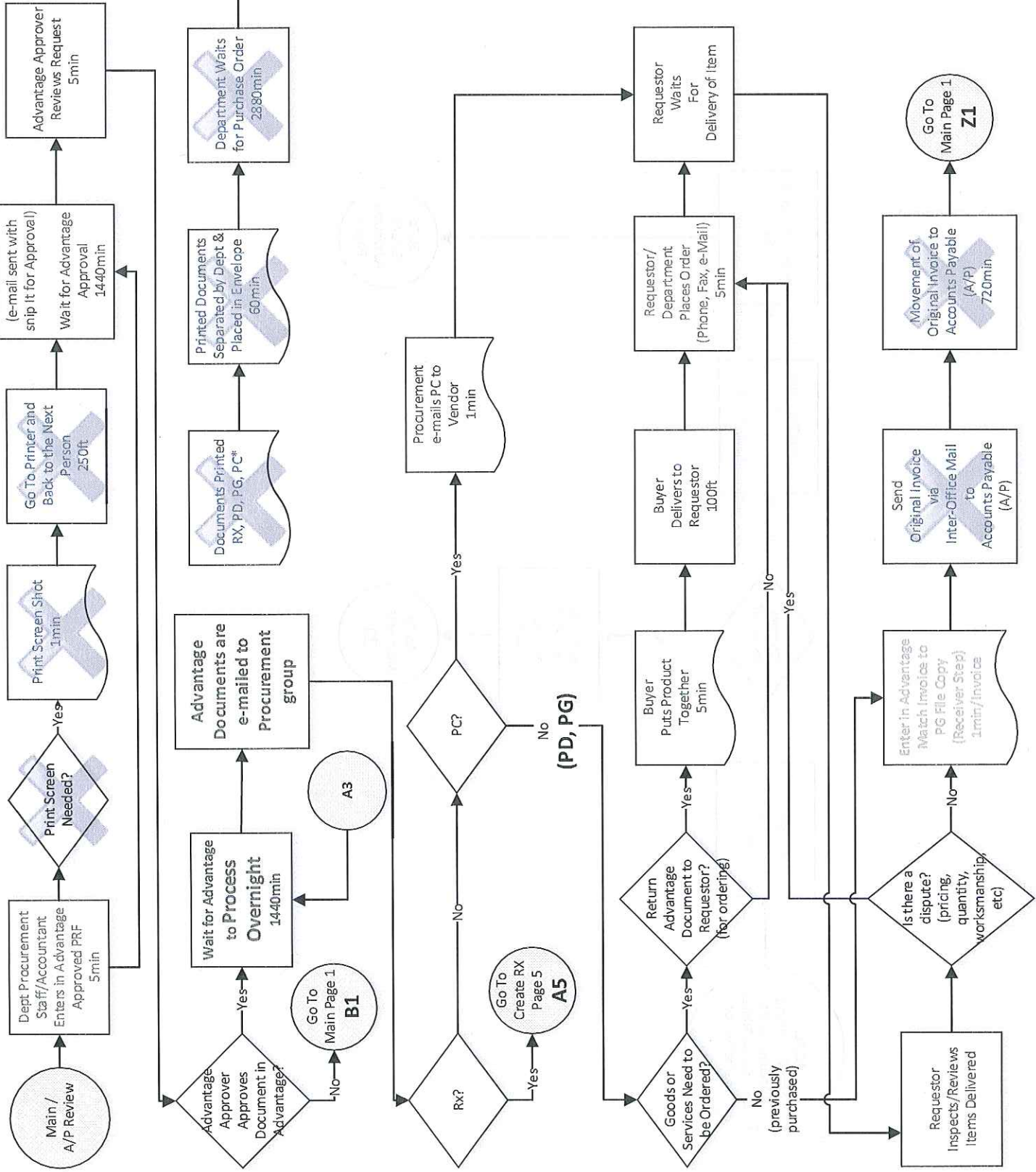
For Microsoft Outlook users, please use the "Email to.." buttons.

Action #5



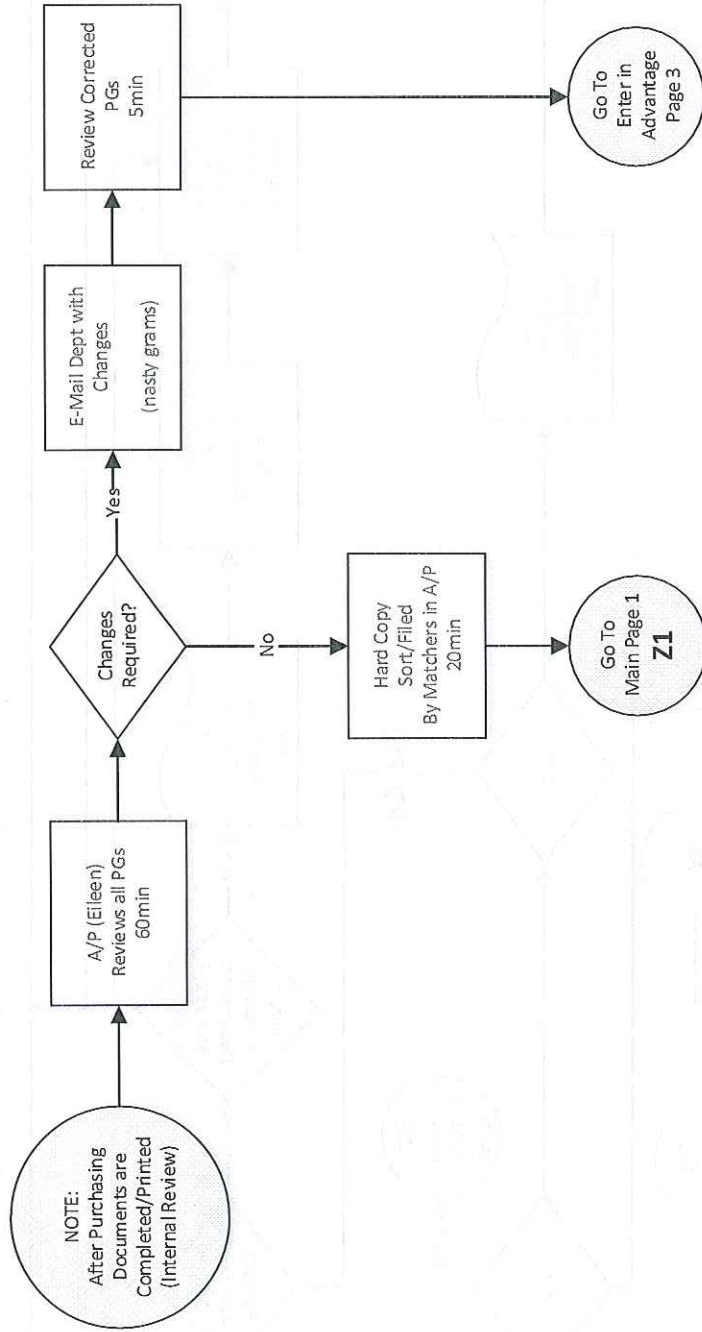
PG – Price Agreement Release
PD – Purchase Decentralize
PC – Purchase Centralize

Enter in Advantage Page 3

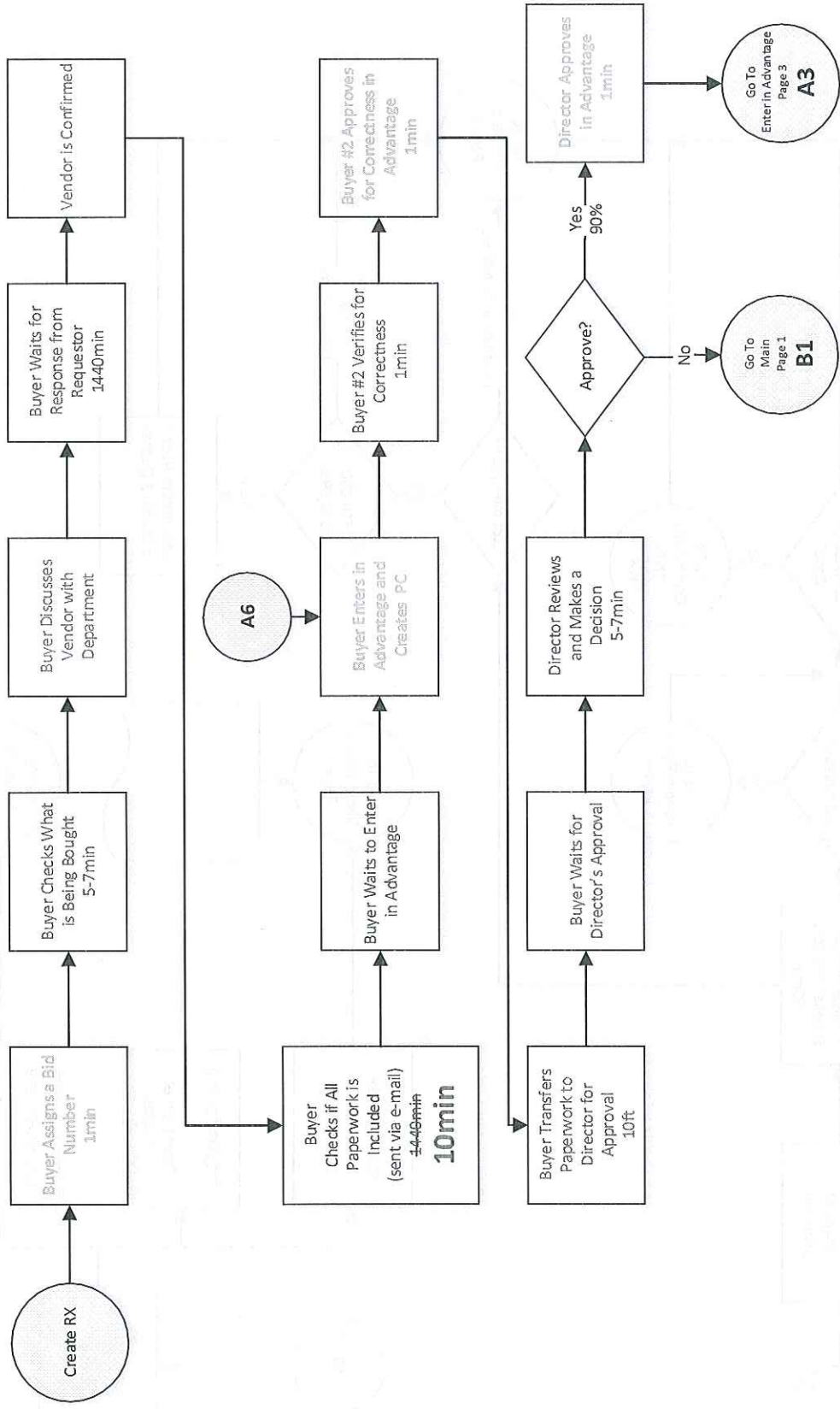


A/P Review

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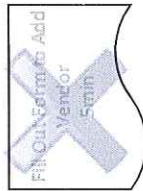
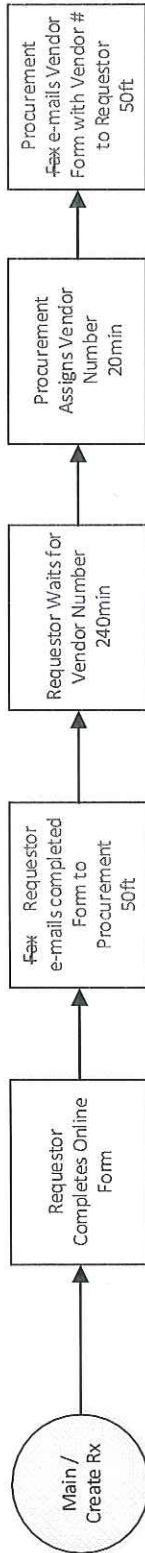
Discretionary





Vendor Form (PD, Rx)

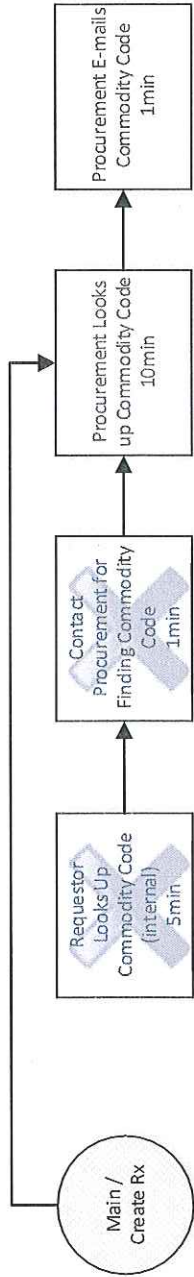
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10/12/11
10/12/11
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10/12/11

NOTE: Identifying Commodity Code to assign is now the responsibility of the Procurement group



Chiappetta ,Ayce

From: Lee, Patrick
Sent: Friday, November 21, 2014 4:34 PM
To: DL Adv Acct Clerk; DL Adv Problem Res
Subject: Purchase Order Electronic Distribution - Beginning January 5, 2015 Announcement

Part of the continuous improvement initiative of Milwaukee County, beginning Monday, January 5, 2015, the Purchase Orders (PD, PG, PC, etc.) and Change Notices will be produced and distributed electronically instead of paper form. OnBase Enterprise System will be utilized for this purpose.

This means that there will be NO Paper Copies of these documents sent to users.

Some of the merits of this conversion that have been identified include conservation of paper (sustainability) and reduced expenses (printing, physical distribution, paper copy storage). This distribution method will provide for faster distribution of your documents (1-3 days shorter), indefinite archiving of PO documents and ability for departments to distribute POs electronically. We appreciate your support in this effort. We understand this is a significant change, please take this opportunity to gain efficiencies within your department. We will be glad to assist you in any issue that may arise.

We will provide training and registration for a smooth transition.

TRAINING



- Online training sessions ^{15 min} will be provided in December 2014 and January 2015.
- Topics to be covered include OnBase log in, retrieval and viewing of purchase orders.
- If you wish to attend, please follow the link to complete "Training Registration" form. You will receive an email confirming your registration and link to the training event (Lync).

REGISTRATION FOR PAPERLESS POs



- Use the following link to view the current registered users. These users are currently receiving POs both as an attachment and a link to OnBase via email each morning. They have archival access to PO documents within OnBase.
- If your name does not appear on the list and you would like to register for distribution and OnBase access, please follow the link to complete the "Procurement Paperless Distribution" form online. You will receive an email confirming your registration.

[Training Registration Link](#)

[Registered Users Link](#)

[Procurement Paperless Distribution Form Link](#)

HOW TO INSTALL ONBASE FOR NEWLY REGISTERED USERS:

Follow these simple steps to install and view Purchase Orders online using OnBase:

1. Follow this link to install OnBase if you are not a current registered user.

http://ap71wpchc/Unity_Client_AP71WPCHC_PROD/UnityClientUnity_Client_AP71WPCHC_PROD.application

Press **INSTALL** button when presented with the installation.



Within 48 hours you will be able to sign in to OnBase (icon will be on your desktop) using the following format.

User Name: **firstname.lastname** (example: **john.smith** or **mary.wilson**)

Password: **password** (You will be required to change your password on first login)

2. Click on **Retrieval**
3. Choose one of the types under **PROC**. If you would like to see it all, choose first line of PROC, shift, choose last line of PROC. You can further filter based on keywords or date ranges. Click on **Find**.
4. Click on the purchase order document to view.

When a new PO or Change Order is issued, you will receive an email notification with an attachment of the PO document and a link to OnBase. Click on the link provided to login and view it online.

IF YOU WISH TO LEARN MORE ABOUT USE OF ONBASE PRIOR TO THE TRAINING MENTIONED ABOVE, PLEASE CLICK ON THE LINK BELOW:

[OnBase Training](#)
[Frequently Asked Questions \(FAQs\)](#)

QUESTIONS	Contact	Phone Number	Email
Procurement Questions	Patrick Lee	414-278-4137	Patrick.Lee@milwaukee
Document Distribution Questions	Lynn Fyhrlund	414-278-4132	Lynn.Fyhrlund@milwau
Technical Issues	IMSD Help Desk	414-278-7888	

If you know of any other individual that may need OnBase access or emails related to this memo would you please forward this correspondence.

Action Plan #9: email notice of intent

	Current	Future
Annual Sealed Bids	195	195
% of time not lowest bid accepted	30%	30%
Notice of Intent	59	59
Time Spent/Notice of Intent (min)	40	5
Time Spent/Year (min)	2,340	293
Business Days Spent/Year	5	0.6

*1 business day=8*60min=480min

