Munis Purchasing Process Improvement

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CLEVELAND PUBLIC LIBRARY
www.cpl.org

Project Description

Currently when creating a purchase request there are multiple steps needed in order to receive the item. Managers have commented about the complexity of the process, how intimidating and challenging it is to remember all the involved the steps, and the length of time it takes to receive (or not) the items, etc.

S.W.O.T.

STRENGTHS

Staff/Accounting
Department
Resources
Trust/Reputation
Knowledge/Skill
Support of Board

S.W.O.T.

WEAKNESSES

Bureaucracy
Loss of Quality Vendors
Slow Turnaround
Lack of Autonomy
Territorial/Control

S.W.O.T.

OPPORTUNITIES

Efficiency
Training
Shift in Culture
Faster Turnaround
Higher Morale
Brainstorming
Inter-Departmental

Meetings
Increased Knowledge
Expand Vendor Base
Enhanced External
Reputation

S.W.O.T.

THREATS

Entrenched Behaviors
Apathy
Current Company
Culture
Inter-Departmental
Cooperation
Fear of Change

MISSION

To streamline the purchasing process when aquiring materials & services making it more efficient and completing it in a timely manner.

GOALS

- Implementation of a system-wide training with the instructions for the new process
- Provide read-only access to Munis for end-users (managers)

OBJECTIVES

- To reduce purchase order number wait times by 25% after process launch and training
- To coordinate exchange and approval of "master" Terms & Conditions for all vendors & contractors by the end of 2020

PERFORMANCE MEASURES

- Survey managers pre and post process launch
- Pre-survey in October 2019 managers meeting/survey
- Feedback from legal department on adopting "master" terms and conditons for all vendors and contracted services
- Vendor/contractor compliance

DATA TRACKING & REPORTING

Quarterly review between managers (Facilities) and Accounting & Legal Departments
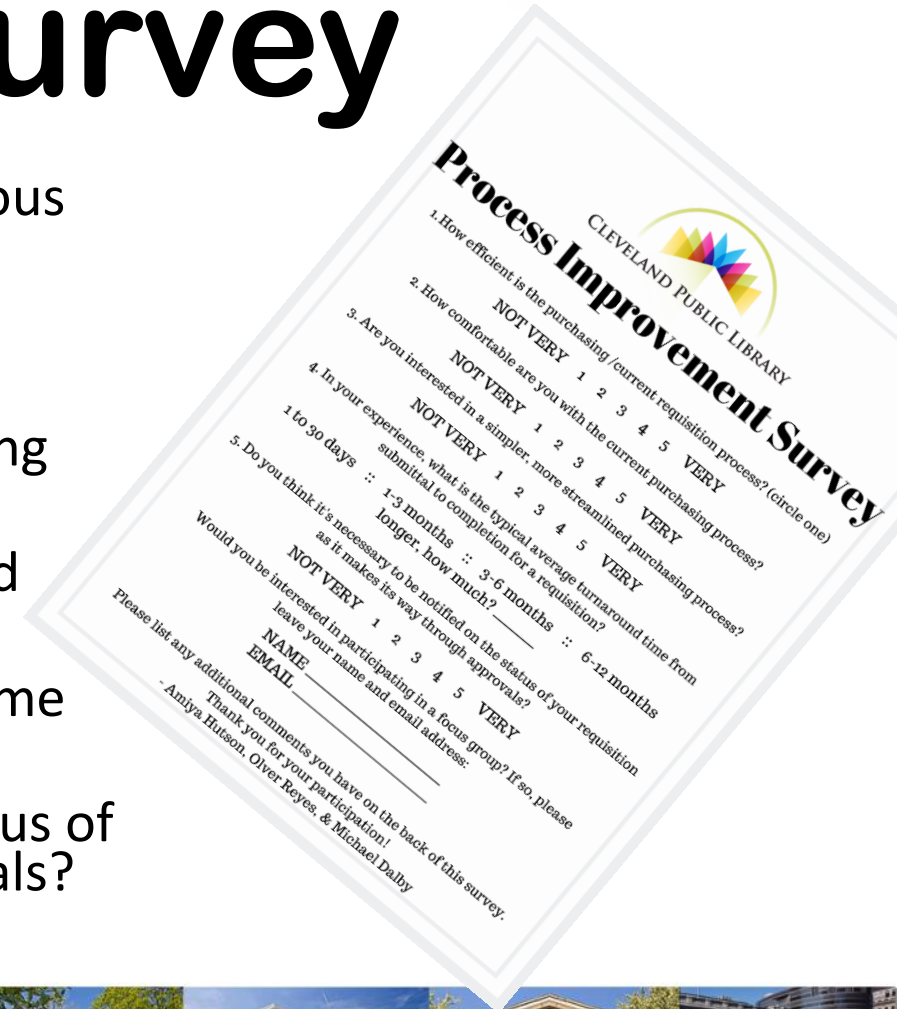
Management Survey

5 questions posed to over 50 managers from various departments

1. How efficient is the purchasing/current requisition process?

2. How comfortable are you with the current purchasing process?

3. Are you interested a more simpler more streamlined purchasing process?

4. In your experience what is the typical turnaround time from submittal to completion?

5. Do you think it's necessary to be notified of the status of your requisition as it makes its way through approvals?

Process Improvement Survey

CLEVELAND PUBLIC LIBRARY

1. How efficient is the purchasing /current requisition process? (circle one)
NOT VERY   1   2   3   4   5   VERY

2. How comfortable are you with the current purchasing process?
NOT VERY   1   2   3   4   5   VERY

3. Are you interested in a simpler, more streamlined purchasing process?
NOT VERY   1   2   3   4   5   VERY

4. In your experience, what is the typical average turnaround time from submittal to completion for a requisition?
1 to 30 days   ::   1-3 months   ::   3-6 months   ::   6-12 months
longer, how much? _____

5. Do you think it's necessary to be notified on the status of your requisition as it makes its way through approvals?
NOT VERY   1   2   3   4   5   VERY

Would you be interested in participating in a focus group? If so, please leave your name and email address:

NAME _____
EMAIL _____

Please list any additional comments you have on the back of this survey.

Thank you for your participation!

- Amiya Hutson, Olver Reyes, & Michael Dalby

Survey Results

How efficient is the purchasing/current requisition process?

How comfortable are you with the current purchasing process?

Are you interested a simpler more streamlined purchasing process?

In your experience what is the typical turnaround time from submittal to completion?

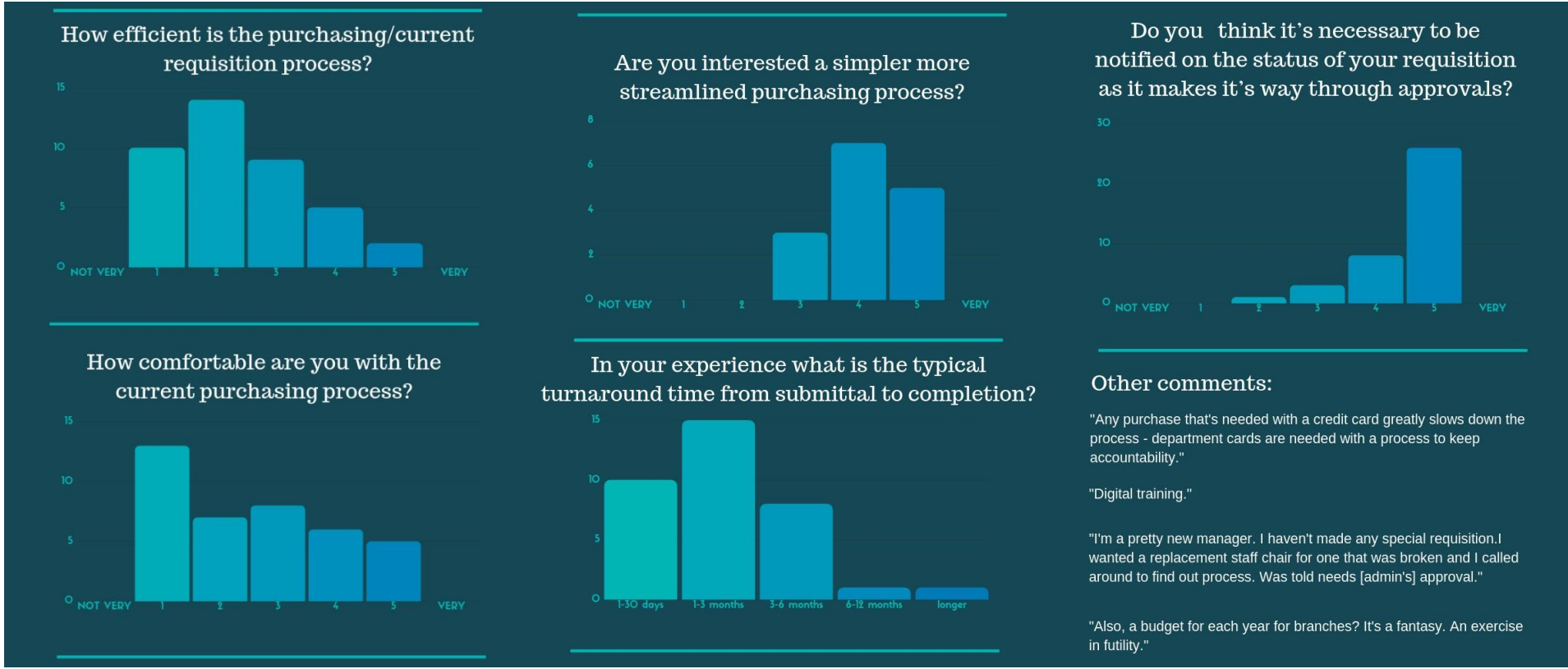Do you think it's necessary to be notified on the status of your requisition as it makes it's way through approvals?

Other comments:

"Any purchase that's needed with a credit card greatly slows down the process - department cards are needed with a process to keep accountability."

"Digital training."

"I'm a pretty new manager. I haven't made any special requisition.I wanted a replacement staff chair for one that was broken and I called around to find out process. Was told needs [admin's] approval."

"Also, a budget for each year for branches? It's a fantasy. An exercise in futility."

Manager Comments

Focus Group

10 managers from various departments (Branches, Main Library, Property Management) volunteered

Initial meeting discussed:

- Desired project outcomes
- Shared survey results
- Discussion about Munis
- Billing – why are hard copies needed in an electronic environment?
- Multiple signatures required
- Legal Terms & Conditions on purchases
- Does CPL need new software package

Desired Outcomes

1. Outline all the necessary steps in the process
2. Delete unnecessary steps
3. Make process paperless (electronic signature)
4. Streamline the process (enhance communication)
5. Comprehensive management training, in person as well as online

MPI Subcommittees

Created the "Munis Process Improvement (MPI) Task Force" with a unique email address to post feedback on assignments:

1. What Munis functions are currently available?

2. List of desired features

3. What do other libraries use/similar software to Munis

4. Training

5. Detail the steps in the ideal process

MPI Subcommittee Current/Desired Functions

- Items needed before entering a MUNIS REQ
- What to do if a vendor is not active in MUNIS
- How to enter a REQ
- How to duplicate a REQ
- How to copy and paste within a REQ
- How to Release a REQ into Workflows for approvals
- How to check where REQ is in Workflows approval process

- How to search for REQ How to browse REQs and convert list to Excel
- Checking MUNIS REQ
- Purchase Order status
- Invoice Processing
- Checking payment status
- After REQ Process
- Account Status
- How to approve payment

MPI Subcommittee Desired Features

Problem: For Capital Projects, we would like to have Purchase Orders sent to multiple individuals from our team. We have six buildings that will be under construction within the next two years, currently only the person who enters the requisition is notified when a PO has been converted. The whole capital projects team will need this information. As it stands, the person entering the requisition would have to manually forward the email to the intended recipient, this process should be automated through Munis.

Solution: Automate notifications process to allow more than one person to receive PO conversion emails.

MPI Subcommittee Alternatives

Software for HR, Payroll, Talent, Timekeeping, etc.

Kronos https://www.kronos.com/

Creative Microsystems, Inc. https://www.civicacmi.com/

Magnus Mart https://www.csuohio.edu/purchasing/magnus-mart

PeopleSmart https://www.oracle.com/applications/PEOPLESOFT/

MPI Subcommittee - Training

What is Munis?
Enterprise Resource Planning (ERP) software solution for Government Agencies and schools. Munis is a software client of Tyler Technologies --- Tyler has hundreds of other "software clients" that it offers to its customers. Core functions include: Financial services, Procurement, Human Resource Management, Payroll and Revenues.

How long is CPL under contract with Munis?
CPL renews it's Munis contract each year. CPL can add/remove "groupings" (i.e. finance, HR) and other "add-ons" (i.e. req entry, personnel management, fixed asset, etc.) as needed

What does CPL use Munis for?
CPL uses 2-Main "Groupings"/Product Suites to help manage and automate many back-office functions related to technology, services, and human resources. Each Grouping then has with a laundry list of "add-ons" we can elect to utilize to customize our Munis experience. Finance - Purchasing, Requisition Entry, Fixed Asset, Forms, etc. HR - Payroll & Benefits, Performance Management, Personnel Management. There were no additional add-ons that would appear to benefit the requisition process, at least from the manager's perspective.

Roadblocks

- Lack of vetted Munis alternatives

- Currently no internal Munis experts to rely upon for training

- Munis representative refused to speak with us, instead directed us to an internal staff

- Internal staff requested we cease and desist project

Successes

Creation of internal experts - Management Training forthcoming in the following areas:

- Munis Needs Assessment document
- How to enter a REQ in Munis
- Requisition Guidelines
- Where to Charge Items in Munis PDF file (dept. & general fund numbers)

All trainings will be found on the intranet in PDF format and given to staff who request a more formal face to face training

- P-Card usage now in place

Next Steps/Recommendations

Currently we are still in the process of...

- MUNIS User guides placed online

- MUNIS Job training

- Onboarding new staff during orientation

- Work with focus group on implementation