



**Finance
Strategic
Transformation**

Project Goods & Services Guide

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**UNIVERSITY
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Updating the Goods & Services Guide | Summary

Issue: The Goods & Services Guide (G&S) is an informative piece of document that educates users on the policies and procedures of how to procure different goods & services. The guide was outdated as it still had legacy Oracle terms and procedures that no longer comply with today's policies and regulations. There had been much confusion regarding the correct operational procedures among department users, including internal PSDS members who use this guide daily to answer customer service questions.

Actions Taken: First, the Business Solutions (BSA) team developed a new framework that aimed to encapsulate updated, important information and a simplified visual representation. Next, BSA collaborated with the Sourcing, Disbursement/AP, and T&E teams on a weekly basis to update content based on commodity type and procurement method (PO, SIR, T&E, Reimbursements). The teams extensively researched the policies and procedures with the aim to ensure that the descriptions were concise, accurate, and informative to everyone. The completed structure and information were sent to the Business Systems Team from Financial Strategy to upload to the UVAFinance [website](#) just in time for the new FY.

Impact: PSDS created strategic value that would rebuild trust through transparency and accountability. This project aims to yield good, long-term partnerships with users.

Changes:

- Clear commodity descriptions that direct to policies and procedures
- Preferred method of procurement
- Ability to search on the title with auto-population
- Updated terminology to match Workday Financials

Major Contributors:

- Kevin Crabtree, John Gerding, Joel Kreider
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- Caleb Knapton, Susanna Huang

Next Steps | Recommendation of Governance, pt 1

Steps- Requesting new content:

1. Department users send email to AskFinance about the changes, new information, etc. that they want to see on the G&S guide
2. T1 User Success team to escalate Salesforce case to the Business Solutions Queue for initial review of merit in 1-2 business days
 - BSA to review change data from SF after the 1st year to see content changes to the guide that were implemented
 - Whole framework and content to be reviewed annually, starting around 2-3months before the end of the FY
3. BSA to review the case and connect with the Functional Area Owner (Sourcing, AP, or T&E) of the proposed change(s) within 1 business week
4. Functional Area Owner(s) will review, discuss, and finalize changes, noting the type of procurement dependencies (turnaround time depends on the complexity of the commodities and change request volume)
5. BSA will communicate the final decision to users
 - BSA will maintain the content and quality of G&S, and work with the Business Systems team as needed to upload new fields

Next Steps | Recommendation of Governance, pt 2

Steps- Requesting new spend category:

1. Department users will send email to AskFinance about adding new spend categories for Purchase Orders and Supplier Invoice Requests, or new expense items for Reimbursement
 - If the Workday Support team (T3) wants to make configurations in this regard before any PSDS involvement, T3 will notify PSDS and expect 2 business days to respond
2. T1 User Success team to escalate Salesforce case to the Business Solutions Queue for initial review of merit in 1-2 business days
3. BSA to review the case and connect with the Functional Area Owner (Sourcing, AP, or T&E) of the proposed spend categories within 1 business week
4. Functional Area Owner(s) will review and discuss which type of method of procurement the new spend categories should be enabled on
5. Recommendation and decision will go to the desk of the Sr. Director of PSDS for approval
6. Approval of new spend categories will escalate to the T3 for configuration
 - T3 to notify BSA of its completion
7. BSA will communicate the final decision to users
 - BSA will update G&S accordingly

Continuous Improvement | Proposed Governance Model

01

Stakeholder

Propose Changes

Send email to AskFinance

Identify discrepancies, gaps, and inaccuracies

02

Business Solutions & Data Analysis

Central Hub

Initial review of change value/merit on an ad-hoc basis

Connect with the appropriate functional area owner(s)

Review framework & all content annually, 2-3 months before FY end

03

Functional Area Owners

Sourcing, AP, or T&E

Review proposed change(s), discuss, and conduct research

Identify dependencies and where to enable the spend categories

Approve and finalize

04

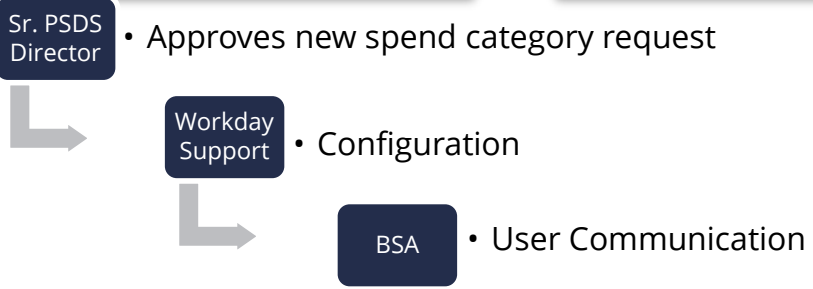
Business Solutions & Data Analysis

Update Website

G&S Guide administration

Ensure quality of user interface

Work with the Business Systems team to upload major updates





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**BSA Team: Addie Coe, Sharon Farina,
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AP Team: Alison Hyler