



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

8. Provide narrative in the Discussion/Comments box to describe the process used, or to detail problems encountered or note parameters for 5, 6 and 7 above.

A Purchase Plus Requisition Log for the period 3/1 to 3/31/06 was printed. There were 240 transactions. A random sampling of 24 actions (10%) was taken. The requisition date was compared to the PO date to determine the average number of days.

Administration, Department of

discuss with doa rep which contract to use & specifics needed on req create req and submit to doa doa approves and sends to vendor

Aging and Long Term Care, Board on

March 2006 Purchase Orders: Grants: 11 Grant Change Order: 1 Interagency Transfer Change Order: 1 Printing: 9 Commodities: 9 I added together the printing and commodities to get a stack of 18 purchase orders. I divided that into statewide contract and non-statewide contract po's. 12 were state contract po's. 6 were not on state contract. I looked up the approval chain on Purchase Plus. Purchase Plus cannot give the data IBIS seeks by the IBIS survey definition of the beginning and end of the procurement process. Regarding the IBIS definition of the beginning of the procurement process, DATCP has no way to find out when a requisition was drafted. DATCP can tell from the requisition form when the requisition was approved and ready to be entered on the Purchase Plus system for creation of a purchase order. That is the only beginning date we can capture from our requisition form. As for the ending date, we don't keep records of when we send out a purchase order. The closest date-stamp we have is when the last approver in Purchase Plus has approved the po. After that, the po is printed out, signed in the bureau of finance, and distributed to the division who is ordering the item. They release the po to the vendor by mail. They do not keep a record of their postmarks. I answered the questions using the data I do have. That is, from the date the division office manager signs the requisition and submits it to the person who will enter the requisition on Purchase Plus until the date the last approver (accounting) in our bureau of finance puts on their approval in Purchase Plus. This does not take account for printing the po, signing the po, distributing the po within DATCP, and sending the po out from DATCP.

Agriculture, Trade and Consumer Protection, Department of

During the month of March 06 we did not have any purchase orders. Any purchases we made (small) were done on a p-card.

Arts Board

[No Answer Entered]

Commerce, Department of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

The main problem is trying to get good data from a agency going the decentralized-to-centralized route for procurement. Ran report and randomly selected POs. Not an absolute average.

Corrections, Department of

Purchase requisitions are filled out by employees around the state and routed via email for approvals by managers. We are part of the Consolidated Agency Purchasing so a decision must be made to route through DOA or not. - There didn't happen to be any orders for services or orders over \$5,000 issued in March 2006. Orders that involve sealed bids would fall into the greater than 45 days category.

Educational Communications Board

Once the draft requisition is submitted, the agency budget officer approves requisition within 3-days if purchase is on the state contract. If the purchase is not on the contract, then staff check with legal counsel to ensure the purchase requisition language is appropriate. In all cases when contracting for services, legal counsel reviews language to ensure all contract provisions are met. Once legal counsel approves, the budget officer approves the requisition. Once the requisition has been approved, the vendor copy is sent to the vendor.

Elections Board

[No Answer Entered]

Employee Trust Funds, Department of

[No Answer Entered]

Ethics Board

We often issue a purchase order the same day the requisition is received.

Financial Institutions, Department of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

From the universe of all March 2006 purchase orders, documentation for every 10th purchase order was retrieved from agency purchase order files to respond to questions 5, 6 and 7. A total of 28 purchases were reviewed. Considerations regarding the length of time to process these purchases include: 1. On some purchases, simplified bid documentation was included that pre-dated the initial requisition date. The time between this pre-requisition activity and the initial requisition date was not counted in the determination of the number of days from requisition to purchase order or award. 2. The length of time between a given requisition and a particular purchase could be influenced by: a. fluctuations in seasonal purchasing needs b. staffing fluctuations – including, absences, vacations, vacancies, etc. c. approval delays – within the agency and at DOA: DET, DOA Procurement, etc.) d. length of time required for delivery e. variation in the complexity of the procurement – through established contract, simplified bid, RFB, RFP, etc.

Health and Family Services, Department of

We are still using paper requisition. The division forwards it to us, we log it in, work on it, and log in on the same previous log the PO number or DC for direct charges.

Historical Society, State

Not a very fair assessment since I was out two of the four weeks on vacation (less than 10 purchase orders).

Insurance Commissioner, Office of

Few and far between. SWIB has approximately 2 service related, non-IT, POs each year.

Investment Board, State of Wisconsin

DOJ uses an electronic purchase requisition form which is routed electronically for signatures. Once the requisition is prepared routing takes less than 1 day. Purchasing issues a PO to the vendor within 48 hours of receipt of a requisition unless there is a problem, such as quotes needed because not on contract.

Justice, Department of

Above answers do not include bidding process, if bidding is required process could take an additional two or three weeks.

Military Affairs, Department of

With staff cuts, it takes much longer to process requisitions.

Natural Resources, Department of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

[No Answer Entered]

Public Defender, Office of State

We are a Purchase Plus agency.

Public Instruction, Department of

Requests for purchases/services other than IT are sent to the fiscal office for budget approval and processing. Requests are usually processed within 3 days, including those requiring a purchase orders.

Regulation & Licensing, Department of

Used 10 PO's from requisitions started during March 06. Noticed that all IT related items take longer to approve causing questions #5 to be greater than 5 days.

Revenue, Department of

[No Answer Entered]

Secretary of State, Office of the

Depending on who is doing it, they will do a purchase req themselves or I will do it. It then goes to the applicable person(s) for signature and then back to me.

Tourism, Department of

Both questions 6 and 7 depend on the dollar amount. If under \$5000, question 6 would be 3 - 5 days. If over \$25,000, greater than 10 days. Same with question 7...depends on dollar amount. If less than \$5000, it would be less than 10 days. If between \$5000 and \$25000, it would be 10 - 20 days. If greater than \$25000, greater than 45 days.

Transportation, Department of

It's difficult to determine the amount of time it takes from the first draft of a requisition. I only know how long it takes from the time it is received in the Purchasing Office. Therefore I answered the questions from the time the requisitions were received in the Purchasing Office. I know for a fact that some people have a requisition generated, signed, and faxed to our office in about 15 minutes. Our turnaround time is about 24 hours in March.

University of Wisconsin System

Pulled random sample per instructions.

Veterans Affairs, Department of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

WSFP is an agency with a purchasing agent and a 1/2 time print buying manager. We abide by all the procurement laws and rules in our purchasing methods.

Wisconsin State Fair Park

When looking at all order types for March 2006 (approximately 300 orders), the average from the start of the request to creation of the order was 1 day. 200 of these orders took less than 1 day from the start of the request to creation of the order. It would take less than 1/2 hour from the start of any request to the creation of any type of order in the RAPIDS system if you eliminated the delay time for the different approval levels.

Workforce Development, Department of

10. Describe the process, problems, and parameters etc.

Purchase Plus PO Log was exported to Excel. The worksheet was sorted by the PO Amount column. The value range from \$10K through \$25K was isolated from the rest of the values. No problems encountered.

Administration, Department of

only po > \$10k was contract.. bid process has only been used by this agency for small specialty print / graphics design jobs

Aging and Long Term Care, Board on

I would go to our folder labeled Simplified Bids FY06 in our electronic files. I would open each simplified bid document to see if any bid awarded was over \$10K. If I needed the hard copy of the simplified bid form, I would look in my purchase order files because I attach the simplified bid form to the purchase order.

Agriculture, Trade and Consumer Protection, Department of

We generally do not have such big contracts being a very small agency. Unless we are doing a special event which we have not had for the past couple of years.

Arts Board

run P+ report and count

Commerce, Department of

Report is available from Purchase Plus. Must sort non-simplified bids. The data from BSI is much more difficult as multiple systems are involved.

Corrections, Department of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

Every order and requisition for the year would need to be pulled and analyzed. I would guess you could do that in a day - maybe 2.

Educational Communications Board

Staff obtain information from the agency's purchase order log, which is tracked in an excel spreadsheet.

Elections Board

[No Answer Entered]

Employee Trust Funds, Department of

[No Answer Entered]

Ethics Board

Query Access database

Financial Institutions, Department of

First, all\* purchase orders with totals between \$10,000 and \$25,000 (thresholds subject to this inquiry and simplified bidding) would be found by sorting on/by total PO amount in our PO (Access) database. There may be an indication in the Access database in the "reference" field if a PO is the result of a simplified bid or, if no indication is given in that field, the POs would then be physically pulled from the paper file to determine if the simplified bid record is attached or if the attached requisition otherwise indicates a simplified bid was conducted. \*This approach could only include DHFS' Central Purchasing Office PO data and would not include the institutional\*\* purchase orders. \*\*Institutional purchase orders resulting from simplified bids would need to be investigated by communicating the inquiry to each institutional business office and asking them to search their files accordingly in the most efficient manner.

Health and Family Services, Department of

This is readily available on FIRST.

Historical Society, State

I would be able to go through my p.o. log and determine the ones over \$10,000 and check for contracts. Since most of our goods and services are either on a state contract, or they are much higher than the simplified bid amount and require a separate RFP process. FOR ALL THE SCENARIOS IN THIS SECTION, THE AMOUNT OF TIME IS ESTIMATED AS IF I HAD ONLY THIS TASK TO DO IN THAT TIME PERIOD.

Insurance Commissioner, Office of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

We keep a log of all POs cut. The procurement approval documentation is kept in a file by vendor. SWIB cut 50 POs in FY06. 27 of which were greater than \$10,000.

Investment Board, State of Wisconsin

I would pull from an Excel spreadsheet all PO numbers with a value of \$10K or more. Then I would physically pull the PO's from file to determine which ones were issued based on a simplified bid process.

Justice, Department of

[No Answer Entered]

Military Affairs, Department of

Lack of staff and no automated procurement system.

Natural Resources, Department of

Since our agency is small and we do a lot of our purchases using the mandatory contracts it would not be hard for us to retrieve the information as described in the scenario.

Public Defender, Office of State

We would use our financial transaction database to arrive at the data.

Public Instruction, Department of

As a small agency DRL does not have many purchase orders. Most of them are under \$5,000 and fall under the "best judgement" practice.

Regulation & Licensing, Department of

Using purchase plus reports, query the POs in the range of \$10K & \$25K. From the list of PO's, I would have to view each PO individually (on or paper) to see if a simplified bid process was conducted.

Revenue, Department of

[No Answer Entered]

Secretary of State, Office of the

Look through purchase order log and use my knowledge of how we do things.

Tourism, Department of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

We would use DB2 reporting tools to mine the data from the appropriate tables.

Transportation, Department of

I would first have to get a list of all POs over \$10K. Then I would determine if any of the POs were issued to vendors on contracts and eliminate them. I would check the rest of the POs and see what is in the Reference field. We TRY to put a special number/code in that field if we did simplified bids.

University of Wisconsin System

Using the Wismart data download, filter based on the PD reference PROC8 (+ requisition number) or BID. DOA/DSF does not use the same PD references, although the encumbrances are usually on contract or exceeds simplified bidding thresholds.

Veterans Affairs, Department of

WSFP does purchase orders for all items/services that will cost over \$500. Our print manager keeps track of all PO's and puts out a monthly list by Alphabetical Order, by department, and numerical.

Wisconsin State Fair Park

Would do a Query in the DWD Wisard system requesting all FY06 Blanket and purchase orders between \$10,000.00 and \$25,000.00 that do not reference a contract, bulletin, or reference number. Creating this new report would take less then 10 minutes. Once the original report was created (canned report) it would take a couple of minutes to create this report for any time frame or FY.

Workforce Development, Department of

12. Describe the process, problems, and parameters etc. Does the total amount spent in this scenario include P-card transactions and if no, why? Does it include direct charge payments and if no, why?

Purchase Plus and/or DOA First reports would be generated to obtain those dollar amounts. This would not include P-Card transactions. Those would come from Access Online reports through US Bank. Direct charges could be pulled from Purchase Plus.

Administration, Department of

encumbered and spent approx \$45k

Aging and Long Term Care, Board on

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

1) I would do a vendor search in Purchase Plus to get a list of purchase orders to Insight Public Sector in FY06. 2) I would do a Wismart search to get a list of all payments to Insight Public Sector in FY06.

Agriculture, Trade and Consumer Protection,  
Department of

We did not use this vendor

Arts Board

Run P+ report all POs and payments in Purchase Plus

Commerce, Department of

Run Purchase Plus requisitiopn log for FY and vendor. No P-card nor direct pay data.

Corrections, Department of

A report could be run to get this information. This would include direct charges but would not include P-card transactions. To get P-card info we would need to pull hundreds of vouchers and enter that information into a spreadsheet.

Educational Communications Board

Within purchase plus, would review all purchase orders created for Insight, then would look to see how much money was left in the purchase order and whether the purchase order was liquidated or not. Staff would also review the agency's internal operating budget spreadsheets to determine total amount spent from the purchase order.

Elections Board

[No Answer Entered]

Employee Trust Funds, Department of

[No Answer Entered]

Ethics Board

Query access database and P-Card spreadsheet, if necessary. It could include p-card transactions and direct charges.

Financial Institutions, Department of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

An ad hoc query is run against the FMS transaction database using the parameters "vendor number" and "SFY" to identify both encumbrances and payments. The information does not include P-card transactions since P-card payment detail is not kept in the FMS database by vendor but only at an accounting string summary as is the case in WISMART. The information does include direct charge payments.

Health and Family Services, Department of

This is readily available on FIRST

Historical Society, State

Again, I would query my p.o. log and get a total. This would account for nearly all the transactions, since we purchase hardware and software types of goods using the purchase order. For actual payments, our accountant could run a report on the First system. Last, I could run a report on Access to query by company and get any minor p-card transactions.

Insurance Commissioner, Office of

SWIB tracks PO amounts encumbered and actual amounts paid. We have an internal vendor tracking system. No. We put all Insight procurements on PO. They are greater than \$5,000.

Investment Board, State of Wisconsin

For #1 I would pull all PO's issued to Insight during FY'06 and total them up. For #2 Accounting would run a FIRS report showing all payments made to Insight during FY'06

Justice, Department of

[No Answer Entered]

Military Affairs, Department of

Lack of staff and no automated procurement system.

Natural Resources, Department of

[No Answer Entered]

Public Defender, Office of State

It could include P-card transactions if necessary. Yes, it would include direct charge payments.

Public Instruction, Department of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

Using FIRSt and/or WISMART reports, verify encumbrances against purchase orders. Review P-card logs for any purchases. If any direct charge payments were made, they would be included. Information is pulled from FIRSt by FEIN number.

Regulation & Licensing, Department of

Staff can report from Wismart or from Purchase Plus on the total encumbrance to Insight as requested in part 1. They can also produce a report in either Wismart or Purchase Plus on the total spent but it would not include P-card transactions. It would include direct charges. The P-card administrator would have to request a report by vendor to include the P-card transaction amount spent.

Revenue, Department of

[No Answer Entered]

Secretary of State, Office of the

Look through YTD report, Scott Gletty's p-card usage, and direct charge tracking spreadsheet.

Tourism, Department of

We would use DB2 reporting tools to mine the data from the appropriate tables. Does not include Pcard txns as we do not allow computers and computer equipment to be purchased with Pcards. Direct charges would be included.

Transportation, Department of

I would have someone run a report from PeopleSoft. Depends on how long it would take them.

University of Wisconsin System

Pull wismart data on Insight from Data downloads less than one hour. Submit P-Card report request to AccessOnline and add to Wismart Data.

Veterans Affairs, Department of

Using our PO list we would just go alphabetically to Insight Sector and see what we spent. We use the PO system as much as possible and the P-card system as least as possible.

Wisconsin State Fair Park

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

DWD already has canned reports created for these scenarios. Both query would only require the end user to enter the vendor and the FY. It would only take DWD a couple of minutes to create these 2 reports out of the Wisard system which uses business objects to query against the DWD database.

Workforce Development, Department of

14. Describe the process, problems, and parameters etc. Does the total amount spent in this scenario include P-card transactions and if no, why? Does it include direct charge payments and if no, why?

Purchase Plus and Access Online reports could provide this information. It would take considerable time to compile monthly data and validate vendors to the certified listing.

Administration, Department of

[No Answer Entered]

Aging and Long Term Care, Board on

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

1) I would add up the purchase order amounts from all of the purchase orders I reported on my MBE monthly reports for FY06. 2) I would add up the totals on my MBE monthly reports for FY06. My numbers would include p-card transactions because those are required to be reported on the MBE report. My numbers would include direct charge payments because they are also required to be reported on the MBE report. I'm not sure if you want to figure in the time it takes me to generate my MBE report each month in the first place. Once I do that, the information referred to in 13 is easy to obtain. The problem is getting to the point of having 12 complete MBE reports to reference. I did not figure in that time. A more automatic way of connecting who is an MBE with who we purchased from did exist in Wismart. The problem was that our data was corrupted because agencies were calling some vendors MBE's who were not, officially. Once a vendor profile is entered in Wismart, it is there for all agencies to use. We all share that data. So when one agency erroneously entered a business as an MBE, we were forced to rely on erroneous data. Because we learned not to trust the Wismart MBE report anymore, we began to do our MBE report by hand. This means, each month we go through our list of hundreds of Wismart payments one-by-one and look for the needle in the haystack MBE, who we find by trying to match the businesses we paid with the businesses on the MBE search engine on the DOA website. Our list of payments includes both direct payments and payments from an existing purchase order. I also go through the p-card statements by hand and compare those businesses to those in the DOA MBE search engine. The process could be much more efficient. If the Wismart MBE report could be trusted to tell us what payments we made to MBE's from purchase orders and direct charge payments without me having to go through payments one-by-one and ask if the business paid is an MBE, the process would speed up considerably. Likewise if there was some automatic system to capture from the US Bank online system what purchases are MBE by automatically comparing the list of MBE's with all of DATCP's p-card purchases. Data corruption (calling a vendor an MBE when it is not) will be a risk inherent in IBIS as much as Wismart. The challenge will be to provide training adequate enough to prevent that kind of harm.

Agriculture, Trade and Consumer Protection,  
Department of

[No Answer Entered]

Arts Board

Can't identify minority vendors in p-card Can get P+ info

Commerce, Department of

No system in place to accumulate p-card data or direct charge data (BCE) Purchase Plus has encumbered dollars. FMS may or may not show payments.

Corrections, Department of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

We could run a report by vendor. There are very few minority vendors that supply broadcast equipment which is the bulk of our purchases. It would not include P-card for the reasons in #13.

Educational Communications Board

Would review the purchases made in purchase plus and with the state purchasing card.

Elections Board

[No Answer Entered]

Employee Trust Funds, Department of

[No Answer Entered]

Ethics Board

Query access database, which identifies minority vendors.

Financial Institutions, Department of

DHFS currently generates a standard monthly report of minority expenditures. Expenditure dollars for a fiscal year could be calculated using those monthly reports or a year-to-date report could be generated requiring minimal changes to the existing job parameters, i.e., less than 1 hour. The information does not include P-card transactions since P-card payment detail is not kept in the FMS database by vendor but only at an accounting string summary as is the case in WISMART. The information does include direct charge payments.

Health and Family Services, Department of

This includes Pcard statements, but no direct charge payment. We have to do this monthly for the MBE Director, so it would merely be pulling the monthly reports. The Purchasing Manager review the Pcard statements for MBE's and pulls copies of the POs when doing them. The biggest problem with our system is it is done manually and we probably lose a lot of information because I do it on memorizing the list of vendors. There is a very large chance that I miss some.

Historical Society, State

I have the purchase orders flagged and can run a total within a couple minutes. Each month I query the First system and get the actual spend for the minority report. Therefore I could add up the 12 reports for a total of the year's spend.

Insurance Commissioner, Office of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

Run monthly MBE report and report to DOA each month. We get a feed from WisMart for our Total Cost system. Then produced on spreadsheet.

Investment Board, State of Wisconsin

Accounting would run a FIRS report showing all MBE payments and encumbrances to MBE's. However, additionally, I have to review all bi-weekly p-card transaction reports to determine any payments made to MBE's as FIRS does not capture this information.

Justice, Department of

[No Answer Entered]

Military Affairs, Department of

Lack of staff and no automated procurement system.

Natural Resources, Department of

[No Answer Entered]

Public Defender, Office of State

No P-card data would be available. It would include direct charge payments. We have no ready way to identify MBE spending using current systems. It is a very manual process.

Public Instruction, Department of

IT vendors used are by contract (RFS) and are listed as minorities on VendorNet. Other vendors may have to be contacted to provide MBE status. In prior years, Office Max provided a list of MBE's that DRL had purchased from through the office supply contract, however, Office Depot has not provided such a list. Some purchasing from Office Depot may have to be investigated.

Regulation & Licensing, Department of

Using purchase plus reports, query the MBE POs for part 1 answer. Part 2 is more difficult. Purchase Plus can give us PO spend and direct charge spend with MBEs, but not P-card or travel card amounts. You would need to request reports specific for each MBE vendor through the P-card and travel card coordinator.

Revenue, Department of

[No Answer Entered]

Secretary of State, Office of the

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

Monthly spreadsheet is kept by accountant

Tourism, Department of

We would use DB2 reporting tools to mine the data from the appropriate tables.

Transportation, Department of

Again, I would have someone run a report from PeopleSoft. MBEs are coded in our vendor file.

University of Wisconsin System

Purchasing agents keep monthly reports and an annual report. The data would be readily available.

Veterans Affairs, Department of

Our print manager keeps tabs on this item as well.

Wisconsin State Fair Park

DWD already has canned reports created for these scenarios. Both query would only require the end user to enter the FY. It would only take DWD a couple of minutes to create these 2 reports out of the Wisard system.

Workforce Development, Department of

18. Describe the process, problems, and parameters etc. for 15, 16 and 17 above.

The Purchase Plus to WiSMART interface occurs every day at 10:30 a.m. Any requisition that gets approved after 10:30 a.m. must wait until 10:30 a.m. the following day for the interface to process.

Administration, Department of

not sure what you're talking about in these 3 questions..

Aging and Long Term Care, Board on

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

Once a purchase order is through all levels of approval in Purchase Plus, we must wait for the purchase order to upload into Wismart before we can print it. This means that if a purchase order is through the approval process in Purchase Plus anytime after 10:30 am one day, we won't be able to print it until after 10:30 am the next day. This could add a day to some purchase orders.

Agriculture, Trade and Consumer Protection,  
Department of

Once it is keyed in we have to wait 1-3 days for the actual PO or arrive by inter-departmental mail before sending it off to the vendor.

Arts Board

[No Answer Entered]

Commerce, Department of

#15 -- WCW enters data twice. Once into Platimum for Windows and once into Purchase Plus. BSI enters three times or more. #16 -- WCW's answer would be yes. The rest of the agency "no." All payments must be entered into FMS which then talks to WISMART.

Corrections, Department of

Employees fill out a requisition in an excel spreadsheet and it is entered into Wismart.

Educational Communications Board

[No Answer Entered]

Elections Board

[No Answer Entered]

Employee Trust Funds, Department of

[No Answer Entered]

Ethics Board

A requisition is used to enter the purchase order into WiSMART. Certain pieces of information are entered into an access database.

Financial Institutions, Department of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

A requisition is initiated (data typed into a Word form/template) by a requestor who may or may not type in the account coding in addition to the other data required (such as description, number, shipping address, etc..) The paper requisition then travels to various approvers (sometimes upwards of 3 depending on the requisition amount, type - IT, services purchases etc.) and appropriation (budget and/or accounting have to confirm the coding is appropriate to the activity and that the appropriation has sufficient funding prior to encumbrance) Once approvals are in place, the requisition makes its way to purchasing where some data is keyed into an Access database log where the requisition receive its assigned PO number. Then additional data is typed into another Access database template where it becomes a printable purchase order. Finally, the purchase order is keyed (encumbered) in FMS by purchasing. The carbon copies are distributed and the original PO is then mailed (or faxed) to the vendor.

Health and Family Services, Department of

The Division enters it into their data base (Access or Excel), Financial Services (FS)logs it in our data base in Access, Purchasing logs it into Wismart, when the PO is printed Purchasing logs in the PO number or Accounts Payable logs in the DC for direct charge in Financial Services'Requisition log. NOT ALL PO numbers and Direct charges get logged in the FS Requisition log. This is very time consuming.

Historical Society, State

Not much time is added because we have an on-line requisition form that all parts of our agency can access. In most cases, other personnel fill in the requisitions and forward them to me with signatures. The only requisitions I fill out are the requisitions for print jobs and an occasional simplified bid or contract emcumbrance.

Insurance Commissioner, Office of

Depends on funding source.

Investment Board, State of Wisconsin

Each bureau in DOJ has a purchasing liaison who prepares the purchase requisition and prepares the PO in Wismart. Once the requisition has been routed for all signatures it is reviewed by the DOJ Purchasing Manager. If approved the Purchasing Manager applies the final approvals to the Wismart document, prints it and mails it to the vendor.

Justice, Department of

[No Answer Entered]

Military Affairs, Department of

WiSMART, paper requisitions, purchase order logs in Access.

Natural Resources, Department of

\*\*\* DRAFT \*\*\*



# IBIS Survey - Agency Narrative Responses

Question - Response

Agency Name:

[No Answer Entered]

Public Defender, Office of State

Purchase Plus is our purchasing system.

Public Instruction, Department of

Entered in WISMART only.

Regulation & Licensing, Department of

Enter requisition in P+. Upon approval a PO is automatically created. P+ interfaces to Wismart but creates a 1 day delay for processing over night.

Revenue, Department of

[No Answer Entered]

Secretary of State, Office of the

Purchase req created and then if the purchase is for more than our de minimus we issue a purchase order.

Tourism, Department of

15: Data entered on a requisition that is entered by the end-user never needs to be entered throughout the rest of the purchasing process. No problems. The interface is simply a look-up to an external table that validates accounting information.

Transportation, Department of

Requisitions are received on paper and entered into PeopleSoft. We currently have no problem with the process. Vendor numbers, NIGP codes, class codes, FEIN number verification, and Certificates of Insurance verification are determined by Purchasing staff before a PO is issued. We also make sure the department is using the correct vendor if the item(s) are on contract.

University of Wisconsin System

[No Answer Entered]

Veterans Affairs, Department of

\*\*\* DRAFT \*\*\*



# **IBIS Survey - Agency Narrative Responses**

**Question - Response**

**Agency Name:**

---

The department needing a PO sends a PO request to Purchasing Agent, who fills in all the necessary codes and passed it to the CFO who has to approve of the purchase, then signs off on it and gives it back to the Purchasing Agent who then has them keyed in and printed.

Wisconsin State Fair Park

---

In RAPIDS data is only entered once including the receiving and payment process. RAPIDS interfaces with TED to validate coding but is unknown to the end user unless there is a coding error. Validation is done automatically at the first approval level and does not add any time to the cycle

Workforce Development, Department of

---

**Survey Parameters**   **Open Date:** 9/14/2006   **Close Date:** 10/9/2006   **Participants: 29**

---

**\*\*\* DRAFT \*\*\***