

## **Web-Submission of Procurement Forms**

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## **Abstract**

*The University of Virginia's Procurement Services Department is responsible for maintaining and processing a large number of forms pertaining to various aspects of the procurement process. The Procurement Services staff recently redesigned its paper forms to an electronic format that can be submitted through the web. This innovation has significantly reduced the time and administrative cost required to process these forms and has contributed to the overall goal of saving money for the University by streamlining the procurement process.*

## **Introduction of the Organization**

The University of Virginia, founded by Thomas Jefferson in 1819, is one of the best universities in the United States. *US News & World Report* has ranked the University of Virginia as the best public university for four of the seven years since they began ranking public universities. Among all colleges and universities, the University has always ranked within the top 25 in the nation. The University of Virginia is noted for the architectural beauty of the historic Rotunda and Lawn, the heart of the “academical village” designed by Thomas Jefferson, and for a tradition of academic excellence. Many of the University’s programs such as Law, Business, Medicine, Architecture, and English have ranked among the top ten in the country over the past decade or so. The 19,000 students attending the University work within a true meritocracy and live by an Honor Code unique among American universities. Each student is exposed to the widest spectrum of disciplines – from arts and athletics to humanities and technology.

## **Statement of the Problem**

At the University of Virginia, the Procurement Services Department is responsible for all purchases and non-payroll payments made by the University. Procurement Services is responsible for maintaining and processing a wide variety of forms in as efficient and cost-effective manner as possible. In recent years, both the University of Virginia and the rules governing the procurement process have continued to grow while state funding for University operations has steadily declined. Procurement Services has been required to develop additional forms and process a higher volume of forms with fewer resources.

Faced with the challenge of doing more with less, Procurement Services could not continue to adhere to the relatively slow and costly traditional methods of processing forms. The time and administrative cost of handling forms had to be reduced as much as possible.

### **Design**

The basic redesign of Procurement Services' forms was made by the Information Technology manager working with other Procurement Services staff members according to their area of expertise and in consultation with departmental users throughout the University. It was decided that all forms not requiring an original signature would be put in an electronic format that could be filled out and submitted entirely on the web. One member of the IT staff was given the task of coding the forms in HTML and javascript. The forms were coded to alert the user to common mistakes such as neglecting to fill in required information or providing information in the wrong format. Once the form is complete, it is automatically e-mailed to an appropriate shared e-mail account, so that the submissions are always processed promptly, even when someone in Procurement Services is out of the office. The forms were also coded so the person submitting the form would automatically receive a copy of the form for his or her records.

### **Implementation**

It took one member of Procurement Services' IT staff approximately 96 hours to convert 12 forms to this electronic format that can be submitted through the web.

The new forms were posted on the Procurement Services' website (<http://www.virginia.edu/procurement>) as they were completed. Procurement Services staff makes sure departmental users and University vendors are aware of this resource and these forms are heavily used. In the month of September 2003 alone, for example, we processed nearly 600 vendor registration forms (Individual Payee Registration, US Vendor Registration, Foreign Vendor Registration, and Vendor Change Request), 125 Invoice Correction forms, 50 Stop Payment forms, and 37 Purchase Order Change requests.

### **Benefits**

There are numerous lasting benefits to this redesign of Procurement Services' forms. Web submission of forms saves the time and money of using the US Postal Service and is much faster than using the University's on campus mailing service. Coding the forms so that the user is alerted to common mistakes before the form is submitted saves the time required to review and return forms. The information typed into these forms can be electronically cut and pasted into our ERP application which saves time and reduces errors from retyping. Meeting record keeping and documentation requirements is made easier by the fact that the submitter automatically receives a copy of the submitted form and these forms can be stored, searched, and retrieved electronically. In sum, the creation of forms that can be submitted through the web is an important contribution to the overall goal of streamlining the procurement process and accomplishing more tasks with fewer resources.

## **Retrospect**

The only thing Procurement Services would have done differently is to have redesigned the forms earlier. This project was accomplished, however, without hiring additional staff and it had to be accomplished as part of the normal workflow.