

# Business Operations Service Center



***Come visit us in  
ADM 355B!***

*“I just wanted to let you know that this is the first time in my 20 years, that we have been able to help foster “change” and be involved in a change process. This is very helpful to the people that do the day-to-day operations. Keep up the great work and moving forward to make change happen!”*

*- submitted by a member of the  
Process Improvement Advisory Team*

Business Operations provides Procurement, Shipping and Receiving, Environmental Health and Safety Services to the campus. The team also assists departments with developing and maintaining Practice Directives and Procedures, Quality Assurance, and process mapping and support.

The newly-launched Business Operations Service Center is located in ADM 355B. We are excited to support the campus community by providing the following complimentary services:

## **PO to GO Concierge Service**

For those who are new or do not regularly prepare requisitions for purchase orders, you can now get trained and have the process done on the spot. For more information, please contact Deanna Tam at [dytam@sfsu.edu](mailto:dytam@sfsu.edu) or Larry Lee at [larrylee@sfsu.edu](mailto:larrylee@sfsu.edu).

## **Process Improvement & Documentation**

The Quality Assurance Program provides review, strategic recommendations, and documentation of the University's critical business processes and also works closely with the Process Improvement Advisory Team. To learn more about these services, please contact Cheryl Leung at [csyleung@sfsu.edu](mailto:csyleung@sfsu.edu).

## **Practice Directive & Procedure Development**

The Policy Management & Compliance Program facilitates the development and improvement of departmental practice directives and procedures. Please contact [policies@sfsu.edu](mailto:policies@sfsu.edu).

## **Subpoena & Records Request Processing**

For assistance on responding to any kind of request for records, please contact Andrea Whipple at [whipplea@sfsu.edu](mailto:whipplea@sfsu.edu).

## ANNOUNCEMENT: SERVICE CENTER AND PO TO GO

Business Operations is pleased to announce a newly opened Service Center located in ADM 355B. Among other things the Service Center will be the home of the PO to Go program. Requesters interested in using this program no longer have to come to Corp Yard to take advantage of the resource, though we still prefer you make an appointment to be sure staff are available for you.

You may also stop by the Service Center for help with specific questions regarding requisitions or purchase orders or general information regarding the procurement process.

PO to Go, in addition to letting you walk out with an authorized Purchase Order, will help you get familiar and comfortable so you can enter your next requisition on your own. It's a great opportunity for those new to CFS requisitions or infrequent users of the module. But don't forget about the 2 hour monthly requisition refresher training offered every 2<sup>nd</sup> Thursday of the month at Corp Yard 146 from 10am to 12pm hosted by Nancy Trinh.

To register go to: [https://sfsu.co1.qualtrics.com/jfe/form/SV\\_37qFa8uRA2dXecJ](https://sfsu.co1.qualtrics.com/jfe/form/SV_37qFa8uRA2dXecJ).

Note: PO to Go is only available for commodity requisitions. Due to the need to review contractual terms, insurance, etc. requisitions for services are not eligible for PO to Go. Service Center staff are still happy to answer questions regarding service related requisitions and purchase orders.

Here are the steps to take advantage of PO to Go:

1. Contact Deanna Tam (53511, [dynam@sfsu.edu](mailto:dynam@sfsu.edu)) or Larry Lee (81833, [larrylee@sfsu.edu](mailto:larrylee@sfsu.edu)) to make an appointment.
2. Complete the Interim Requisition Form, <http://fiscaff.sfsu.edu/content/interim-requisition-form-0>. Be sure to include all details of your intended purchase including chartfield information and CFS vendor ID#. (Please contact Vendor Coordinator Minh Nguyen at ext. 83561 or [ngocmn01@sfsu.edu](mailto:ngocmn01@sfsu.edu) if your Vendor ID is not available in CFS)
3. Have the Interim Requisition Form signed by your approver as established in CFS. If you are not sure who this is, Procurement can look it up when you make your appointment.
4. Bring the completed Interim Requisition Form to your appointment at the Business Operations Service Center, ADM 355B. If you received a written proposal/quote from your vendor, bring that as well.
5. At your appointment, you will log in to CFS under your ID and perform all the data entry steps to create your requisition with the assistance and guidance of the Buyer.
6. Once your requisition is complete and your approver is verified, we will convert the requisition to a Purchase Order and print an authorized copy that you can take with you from the session.
7. Because the PO to Go bypasses the standard PO dispatch process, you'll need to be responsible to see that your vendor receives a copy of the PO via e-mail, fax or phone.

We hope you find the Service Center and PO to Go helpful. We are interested in your feedback and comments. Please send to Stephen Smith, [scsmith@sfsu.edu](mailto:scsmith@sfsu.edu).