

Project Overview

Project: Budgeting & Procurement Process

Industry: Healthcare

Customer Profile

Integrated healthcare delivery provider. The healthcare verticals of the company span diagnostics, primary care, day care specialty and hospitals, with an asset base in 7 countries, many of which represent the fastest-growing healthcare delivery markets in the world.

Currently, the company operates its healthcare delivery network in Dubai, Hong Kong, India, Mauritius, Singapore, Sri Lanka, and Nepal with 76 hospitals, over 12,000 beds, over 600 primary care centers, 191 day care specialty centers, over 230 diagnostic centers and a talent pool of over 23,000 people.

Requirement

Hospital leveraged Microsoft SharePoint to manage its budget allocations on monthly basis. A budget form was created for an item and was subsequently send to a set of end users for their approval.

The parameters of the budget form guides the initiator to select the approvers manually. Further process to enhance the procurement process was now required. So, based on the budgeted items, vendors were to be selected whenever an item was to be procured and compared. Then a recommendation note (RN) was required to be generated for the vendor.

Generation of RN had to be in accordance with the approval system of the organization that had different stakeholder's -based on location, cost and item type of the RN to be generated. Now, this manual selection process for selecting the approvers was to be replaced with an automated one.

Adapt Solution

We conducted a thorough need analysis for developing the automated solution on Microsoft SharePoint. There were two matrices defined based on the three parameters: Location, item type, & total cost. One matrix was for the list of initiators for each combination of parameters and other matrix was for the approvers in series to approve the initiated RN for each combination of parameters.

The replacements of users could be either done for a list of matrix at a time or could be done throughout all the list.

Also the parameters were kept dynamic in nature where the range/ options of the parameter can be modified/ increased/ decreased/shifted up a rank or down a rank anytime by the end user themselves(administrator).

To initiate the RN process a new form is initiated in which the approved budgeted items are selected. Some data was to be extracted from the budgeted form and approval process of that item and shown in the RN form. Once items are selected the quotations of the vendors are updated into the form which gives a comparative table of the vendor comparison quotations. Once the form is complete and submitted it would go to its defined path of the approvers where each approver can see the previous approver's comments. Anytime in the process the approver can reject the form or select for a resubmission. Escalations are mapped in the approver process where absence of an approver doesn't hamper the process flow. Once the RN was approved it is tagged in their ERP system where they generate Purchase order against the recommended vendor. This completed RN form (along with vendor comparison chart) is so designed that it can printed.

In the approvals cycle where escalations were built. It caters to situations like a user, involved in workflows, leaving the organization, is outside on a holiday, has a change in role in organization or is to be placed at a different number in the sequence.

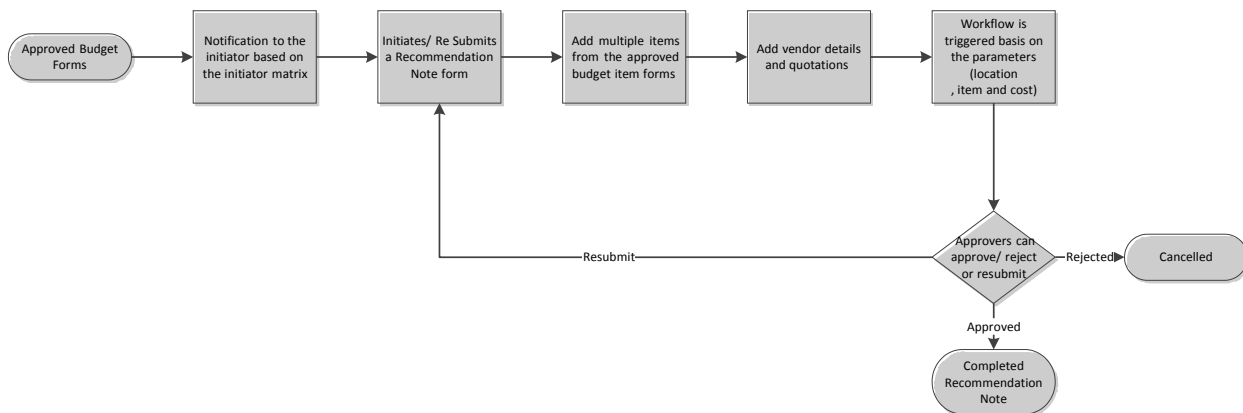
There was a report built where all the approved budgeted items can be viewed and also once the recommendation note on an item was approved the budgeted amount for that item was adjusted. The reports built for budget creation, recording the recommendations for items helps the purchase

department and the management to keep a track on the allocated budgets, expenses, recommended vendors and items bought.

Technical Explanation: In building the solution we have used custom coding to develop 2 web parts and 15 application pages.

Technology Used: Microsoft SharePoint 2010, SharePoint – LinQ, C#, JQuery, SharePoint Designer, SharePoint workflow Foundation

Recommendation Note Process Flow



Recommendation Note Form

Online Recommendation Note

RECOMMENDATION NOTE

RN No.: RN_17 Date: 03-10-2012
 Budget Head: Department Name:

S.No.	CEP No	Item Name	Approval Type	Capex Category	Budget Qty	Budget Amt	Utilized Qty	Utilized Amt	CEP Qty	CEP Amt	Remarks
1	FEHA/IT/2012-13/2	Network Laser Printer (Multifunctional)		IT	3	75000	173	108			

CEP Technical Specification List

S.No.	CEP No	Item Name	Model	Manufacturer	Technical Specification
1	FEHA/IT/2012-13/2	Network Laser Printer(Multifunctional)			

CEP Item Properties List

S.No.	CEP No	Item Name	Patient Safety and Quality	Regulatory	Cost Optimisation and Productivity	Capacity Expansion	Replacement	New Program	Other
1	FEHA/IT/2012-13/2	Network Laser Printer (Multifunctional)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Quotations Invited from the following vendors:

Technical Evaluation:

S.No.	CEP No	Item Name	Recommended Amount	Recommended Vendor	Less Than 3 Vendors	Less Than 3 Vendor-Reason
1	FEHA/IT/2012-13/2	Network Laser Printer(Multifunctional)			<input checked="" type="checkbox"/>	

Dynamic Approval Matrix for RN approval workflow

Approver Manipulation

Location: ITEM Type:
 Cost Bracket:

Approver Manipulation List

Location Name	Item Type	CostBracket Title	Rank	Approver Name	UP	Down	Edit	Delete
AMRITSAR	IT	IT-1-100000	1	VIRTUAL99\test5			Edit	Delete
AMRITSAR	IT	IT-1-100000	2	VIRTUAL99\test3			Edit	Delete
AMRITSAR	IT	IT-1-100000	3	VIRTUAL99\test4			Edit	Delete
AMRITSAR	IT	IT-1-100000	4	VIRTUAL99\test1			Edit	Delete

Add/Edit
 Approver Name:

Add/Replace users for all locations/cep types/cost brackets.

User Name:
 Old User Name: New User Name: