

# DFS Conversations Contract Management Jaggaer Contracts+ Rollout Status

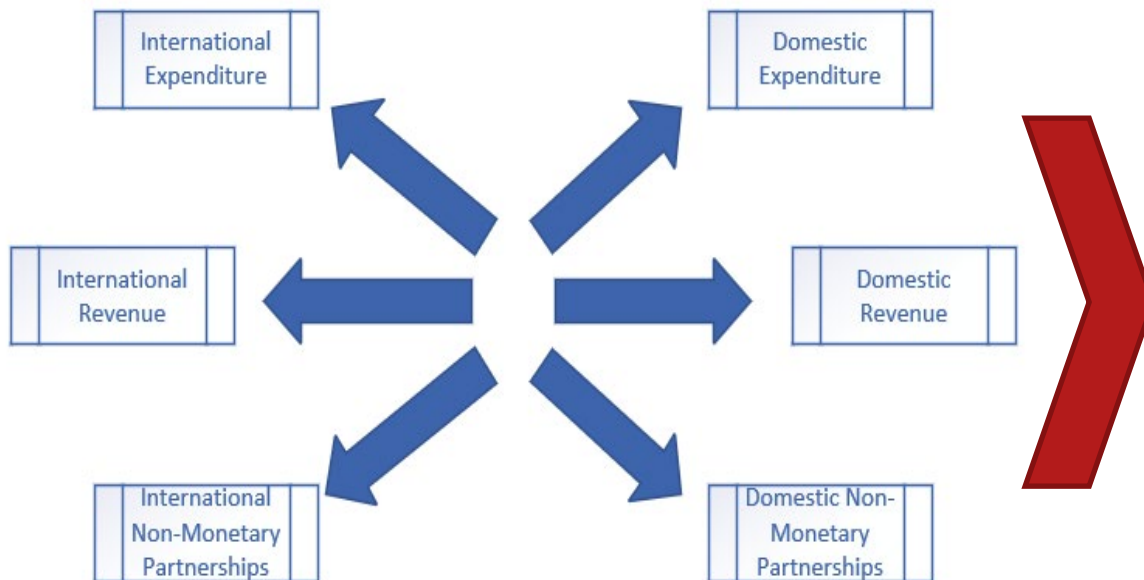
February 14, 2024





# Jaggaer Contracts+ Implementation

Original Rollout Plan  
“Big Bang” of all Contract Types

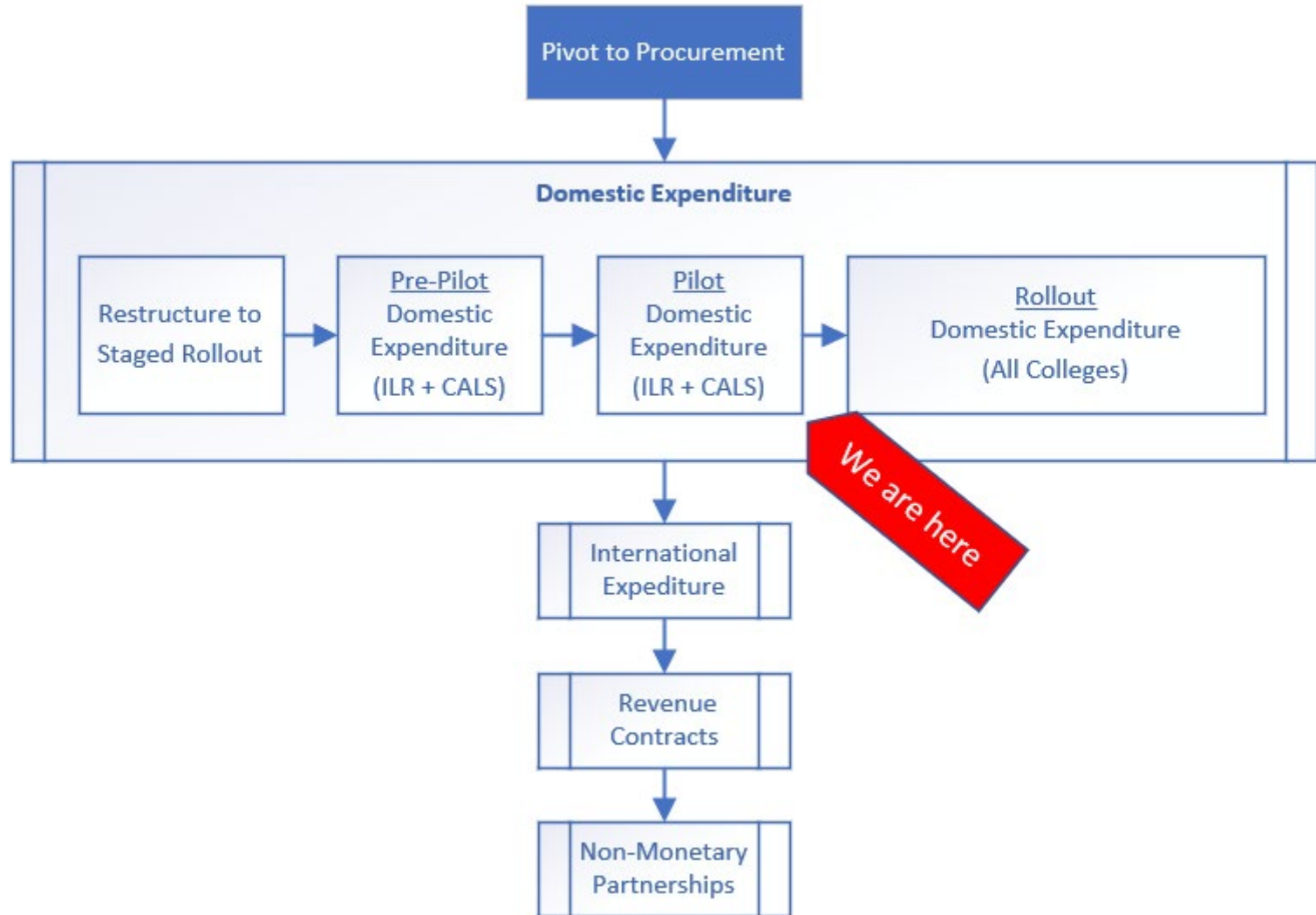


Updated Roll Out Plan  
Staged Rollout  
Pivot to Procurement





# Jaggaer Contracts+ Rollout Plan Status





# Pilot Contracting Process

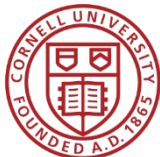
All contract requests start with an I Want doc (single starting point).

- College and Unit faculty and staff members:
  - Need **minimal information** to start.
  - Need **limited knowledge** of the process.
- Shared Service Center (SSC) staff members:
  - Identify Jaggaer Contract Transaction.
  - Review I Want docs (business purpose, account, object code).
  - Review transaction authority.
  - Route to Procurement.



# Pilot Contracting Process

- Central Procurement staff members (Central Facilitator):
  - Registers new vendors.
  - Interacts with Tax (independent contractor versus employee analysis)
  - Interacts with Risk Management (new Insurance Matrix Process).
  - Identifies the proper contract.
  - Prepares the contract record.
  - Initiates the contract with vendor.
  - Initiates the requisition.
- Responsibilities shifting from colleges/units and the SSC to central Procurement staff members:
  - Process creates efficiencies, not new work.



# Visualization of Process Change

**Current Procurement Contracting Process**

Responsible Group	Unit	Joint	Procure
Procurement Type Determination	Green		
Statement of Work Creation	Green		
IC/Employee Determination	Green		
Sole Source Determination	Green		
IT Statement of Need	Green		
Choose Contract Template	Green		
Creating Draft Cornell Contract	Green		
Sending Cornell Contract to Vendor	Green		
Signature Management Process - Cornell Template (no edits)	Green		
Insurance Waivers - Cornell Template	Green		
Insurance Waivers - Vendor Template		Yellow	
Contract T&C Negotiations			Blue
Requesting General Counsel Review			Blue
Signature Management Process - Cornell Template (edits)			Blue
Signature Management Process - Vendor Template			Blue
New Vendor Registration			Blue

**Pilot Procurement Contracting Process**

Responsible Group	Unit	Joint	Procure
Statement of Work Creation	Green		
Procurement Type Determination			Blue
IC/Employee Determination		Yellow	
New Vendor Registration			Blue
Sole Source Determination		Yellow	
IT Statement of Need		Yellow	
Choose Contract Template			Blue
Creating Draft Cornell Contract			Blue
Sending Cornell Contract to Vendor			Blue
Insurance Waivers - All Templates		Yellow	
Contract T&C Negotiations			Blue
Requesting General Counsel Review			Blue
Approve SoW Edits	Green		
Signature Management Process - All Templates			Blue



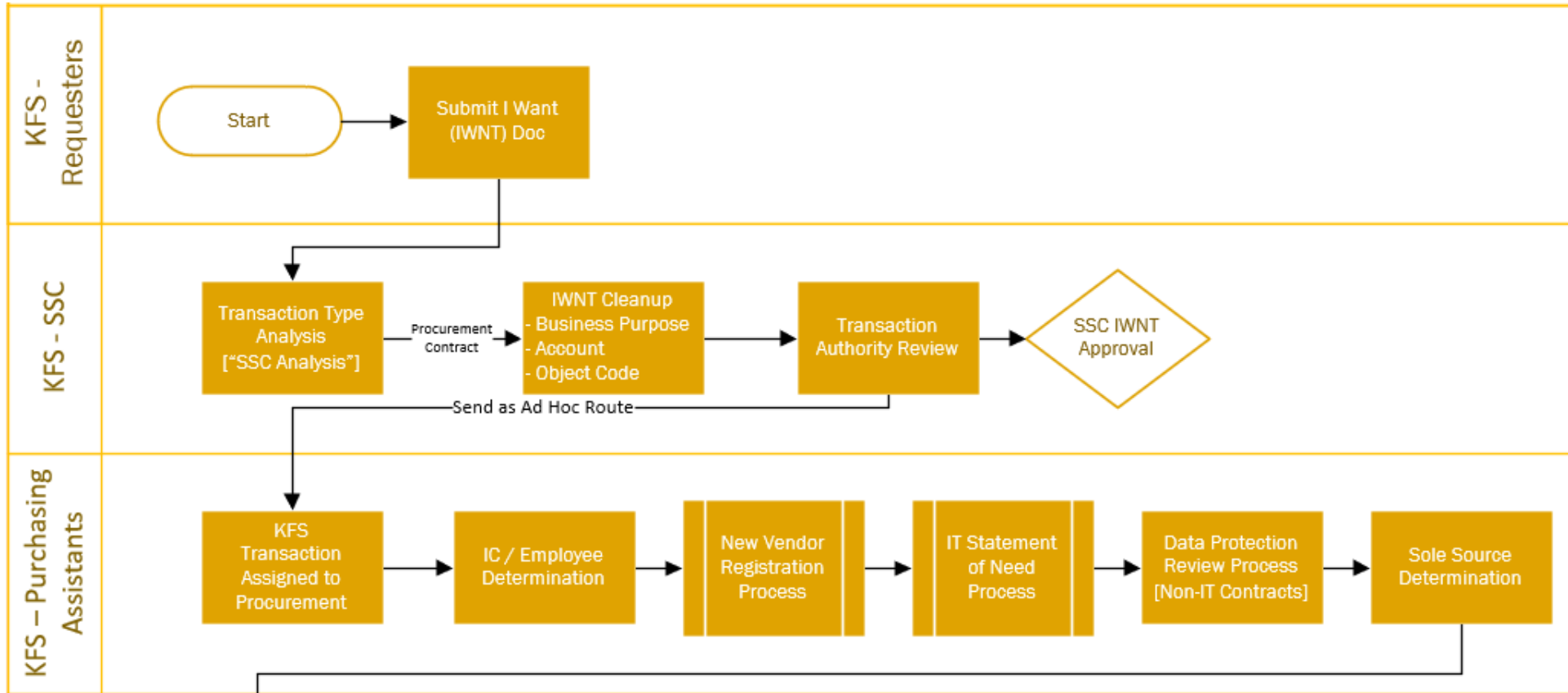
# Process Changes: Unit v. Central Facilitators

## Responsibilities:

- **Units** are responsible for **what** needs to be purchased (e.g., create a Scope of Work)
- **Central Facilitators** are responsible for **how** to make purchase (e.g., manage process, select purchase method, manage contract management software, select contract template)
- **Joint responsibility** for processing certain transaction prerequisites (e.g., Insurance waiver and IT Statement of Need)



# I Want Doc Process Flowchart







# New Pilot Process Benefits

- **Benefits to Units: Less work**
  - Simplifies service provider/consultant engagement process.
  - Reduces administrative burden.
    - No managing contract templates, IC evaluation, and insurance.
    - No complex contract related training.
  - Supported centrally through all steps of the contracting process.
- **Benefits to Central: Less risk**
  - Standardized processes (everything in one place).
  - Controlled templates (no wrong template, no stealth edits).
  - Controlled signature authority.
  - Standardized IC/employee and insurance risk workflows.
  - Full utilization of Jaggaer application (auto-routing and template creation)
- **Benefits to all**
  - Increases visibility.
    - See the current transaction status.
    - Access contracts in a repository.
  - Simplifies the contract process.
    - Lessens bottlenecks in Risk and Tax.
    - Addresses issues earlier.
  - Aligns appropriate responsibilities.
    - Units concentrate on scope buildout (what you want to buy).
    - Central concentrates on running process and creating contracts (how to get it).
  - Leverages existing technology (I Want doc).



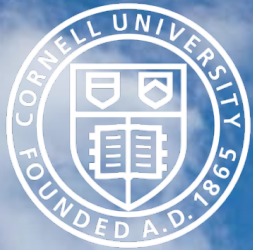
## Current Status: Number of Contracts Processed

- College of Agriculture and Life Sciences (CALS)
  - 24 contracts:
    - Complete: 12
    - In Process: 5
    - Rejected: 7
- School of Industrial and Labor Relations (ILR)
  - 4 contracts:
    - Complete: 3
    - In Process: 1
    - Rejected: 0



## Next Steps

- Continue testing new process and software with actual contracts.
- Finalize staffing plan and resources.
- Once staffing plan and resources are finalized:
  - Develop full pilot and campus rollout plan/timeline.
    - We will be looking for college volunteers.
    - Expect a staged rollout like the SSC.
  - Develop campus rollout communication and training plans.
- Incorporate new contract types into Jaggaer.



# QUESTIONS / DISCUSSION

