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

[Diagram showing flow from Pivot to Procurement through International Expenditure, Domestic Expenditure, Domestic Revenue, International Non-Monetary Partnerships, Domestic Non-Monetary Partnerships, and Non-Monetary Partnerships]
Jaggaer Contracts+ Rollout Plan Status

Pivot to Procurement

Domestic Expenditure

Restructure to Staged Rollout → Pre-Pilot Domestic Expenditure (ILR + CALS) → Pilot Domestic Expenditure (ILR + CALS) → Rollout Domestic Expenditure (All Colleges)

International Expenditure

Revenue Contracts

Non-Monetary Partnerships

We are here
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).
  – 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

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<tr>
<th>Responsible Group</th>
<th>Unit</th>
<th>Joint</th>
<th>Procure</th>
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<td>Signature Management Process - Cornell Template (no edits)</td>
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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

1. Start
   - Submit I Want (IWNT) Doc

2. KFS - Requesters
   - Transaction Type Analysis
     - “SSC Analysis”
   - Procurement Contract

3. KFS - SSC
   - IWNT Cleanup
     - Business Purpose
     - Account
     - Object Code
   - Transaction Authority Review
   - SSC IWNT Approval

4. KFS - Purchasing Assistants
   - KFS Transaction Assigned to Procurement
   - IC/Employee Determination
   - New Vendor Registration Process
   - IT Statement of Need Process
   - Data Protection Review Process [Non-IT Contracts]
   - Sole Source Determination
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