

Executive Summary

Project Background and Introduction

The UAF community is generally unsatisfied with the amount of time and complexity involved in making a purchase. The current process is complex, can be inconsistent, has multiple touch points, is time consuming, lacks transparency, and results in workarounds that lead to compliance concerns. It is often unclear to the end user and to the department what information is required for a given procurement and it is difficult to check the status of a request, once started. Procurement & Contract Services (P&CS) often struggles to provide high-level customer service and get the information needed to complete a purchase in a timely manner which contributes to slow purchase order (PO) turn-around.

The Streamlined User-friendly Procurement & Efficient Requisitioning (SUPER) team was charged with mapping the current process, identifying the problem areas, and determining how best to resolve these issues. A summary of their recommendations follows, as well as a detailed report of their findings.

SUPER Purpose

To create a streamlined procurement process that is user-friendly, transparent, and efficient for all stakeholders.

SUPER Team Members

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- Terry Rahlfs, Procurement & Contract Services
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- Scott Snedden, Procurement & Contract Services
- Kristin Elieff, Office of Information Technology
- Faye Gallant, Margo Griffith, Jennifer Harris, Julie Queen, PIT Crew

Summary of Findings

As part of its process improvement effort, the SUPER team collected data on the time it takes from a request to purchase an item until the Purchase Order for that item is issued.

The team also conducted a campus-wide customer satisfaction survey, covering both how well P&CS provides services, and how important those services are to stakeholders. As part of that survey, the team collected suggestions on how to improve the procurement process. The results of the satisfaction survey and improvement suggestions are attached in the Appendix.

The average cycle time for each step of the process are summarized below:

Request to REQ entry (Unit time)	REQ entry (dept.) to P&CS receipt	P&CS receipt to Buyer assignment	Buyer receipt to PO issued	REQ entry to PO issued	TOTAL: Request to PO issued
3.3 days	2.0 days	0.7 day	5.8 days	9.8 days	21.6 days

Average Unit/Department Time: 5.3 days

Average P&CS/Central Processing Time: 16.3* (not including OGCA sensitive item review)

Total Time: 21.6 Days - Unit Request to PO

The team set the following targets to improve the procurement process:

- Five days for all required elements of requisition completion
- 24 hour turnaround from Banner (requisition) entry to buyer queue in P&CS
- Informal purchases of \$10,000-\$100,000 completed within 7 business days
- Formal purchases (requiring competition) completed within 60 days

Summary of Recommendations

Short term changes within UAF authority

1. **Use Amazon Smile for all University Purchases from Amazon:** Amazon Smile gives 0.5 percent of purchases to the customer’s nonprofit of choice. By shopping on smile.amazon.com and selecting the University of Alaska Fairbanks (or UA Foundation) UAF could recognize at least \$4,000 per year in unrestricted revenue based on current purchasing volume. If volume with this vendor were to increase, ability to recognize additional revenue may exist.

2. **Terminate LPOs:** Limited Purchase Orders are paper-based “blank checks” which enable same day purchases. Vendors do not like these and they are expensive and time consuming to process. Replace with department custodial cards (discussed below).

3. **Reduce the number of requisitions (REQs) processed by raising ProCard limits from \$5K to \$10K for departmental purchasers:** ProCards facilitate faster, more efficient processing and eliminate multiple touchpoints and administrative time and effort for relatively small-dollar purchases. By raising the limit to \$10,000 instead of \$5,000, UAF could eliminate up to 635 requisitions and purchase orders, save over \$40,000 in processing time and effort and generate close to \$40,000 in additional rebates. This change could be worth \$80,000 per year and would make the procurement processes decidedly more user-friendly.
 - a. Specifically for trained Procurement Technicians (PTs), increase ProCard limits to \$25,000 to match existing purchasing authority. There is currently a



Summary sheet (ex. keeping a central/shared ProCard ledger to keep track of current commitments and stay ahead of Banner). (Resources are posted on website).

8. **Roll out improved P&CS website.** In progress, targeted for completion in July 2015. The new website communicates processes clearly, makes information and training resources easier to find, and answers frequently asked questions.
9. **Revise and implement improved Banner Procurement training, to provide needed context to the current information.** The team is in the process of revising the Banner Procurement training to be easier to access, more streamlined, and more relevant. (In progress, target date: July 2015)
10. **Include P&CS staff in the OGCA Harmonization meetings whenever equipment or services in excess of \$100k is planned on restricted awards.** This allows all parties to have the necessary information at an early date, reducing the frequency of “rush” or emergency procurements on restricted funds, which involve greater levels of review and complexity.
11. **Regular monthly or quarterly “all-hands” meetings between P&CS and Procurement Technicians (PTs) to ensure everyone is on the same page regarding current processes and expectations.** These meetings will help PTs absorb the institutional knowledge of P&CS while P&CS will benefit from being up to date on departmental concerns and issues. (Implemented).
12. **Streamline departmental routing and approvals (no more than three):** SUPER recommends, as a best practice for departments, a maximum of three touches at the department before a requisition is submitted to P&CS: Requestor or Principal Investigator, Procurement Technician or Fiscal Technician, and Business Manager or Fiscal Officer (if needed). For purchases on restricted funds, the Procurement/Fiscal Technician should be trained to identify whether the purchase is allowable and funds are available before proceeding, so that the Grant Technician or Business Manager can simply be informed of the procurement, rather than needing to approve before it can advance through the process.
13. **Reduce extra steps for OGCA to check sensitive account codes:** When a requisition is entered into Banner, if it has a sensitive account code on a restricted fund, a notification email is sent to the defined Grant Technician in OGCA to review and approve. This step adds an additional two days (on average) to the procurement process, and regularly results in repeating and duplicating work. SUPER recommends the following options to address this delay: OGCA delegates approval of sensitive account code purchases to unit Fiscal Officers, beginning with those in high volume research units; OGCA identifies a “fast track” list of departments with proven expertise, and automatically approves items from those departments without an



additional review step, similar to UAF Travel processes; or OGCA and unit representatives review the sensitive accounts list to determine whether all any items should be removed.

- 14. Implement PT partnerships via shared services:** To maximize the value of the Procurement Technician (PT) program, SUPER recommends that trained PTs partner to serve multiple units in a buddy or backup system. This ensures continuous levels of service in the units regardless of staff absences, eliminating delays caused by one person being out, and builds expertise. For units that do not have a high enough transactional volume to require a dedicated PT, having the ability to partner with other low volume units (or a single high volume unit) would enable those units to benefit from the faster processing and expert level service regardless of size.

Longer term changes within UAF authority

- 1. e-Procurement:** e-Procurement addresses one of the SUPER team's key rubs in the procurement process, the lack of transparency for end users and departments. Depending on implementation choices and customization, the process could ultimately eliminate the requisition step for departments. For purchases within a department's purchasing authority, that do not have additional requirements, this streamlines simple purchases immensely. Implementing this level of access moves the role of Procurement away from basic approvals and pushing transactions through the process, freeing time for more value added steps in securing best pricing and recognizing savings. Opportunity may exist to eliminate the ongoing annual expense of EAB (\$90,000/year for UA, but UAF currently covers \$60,000/year), offsetting the cost of the e-Procurement system. The option preferred by the SUPER team is ESM Solutions, a cloud based procurement system designed for public sector procurements with the ability to integrate with Banner and DocuSign.
- 2. One-card System:** Eliminate separate travel cards and ProCards, which require double administrative work. UA would be eligible for additional vendor discounts and rebates if business card use increases. In this budget climate, any opportunities for reduced pricing or additional revenue is critical. Additionally, Procurement can make internal process changes (that UAF controls) to reduce requisitions for travel procurement and increase credit card use, which is traditionally much faster, by allowing lodging charges on ProCards. In the long term, moving to a one-card system (all UA procurement and travel on one-card) is most preferred.

Longer term changes within UA authority- Banner changes

The SUPER team met with UA Banner Finance and requested the following improvements to the Banner procurement screens, which will reduce manual work and increase transparency. If UAF elects to move to an e-Procurement system in the near term, some of these items may be unnecessary. *Unless otherwise noted, status in Banner Finance is unknown.*



1. The ability to auto-generate an email to the requester anytime a REQ changes status.
Completed.
2. Assign a date/time stamp to a REQ when a PO is printed (Evisions)
3. Banner assign the next available PO# within the UAF sequence when the REQ prints.
Completed (changed internally). Supported by this change, UAF P&CS also moved to electronic filing for POs, reducing printing costs and processing time.
4. Biweekly report that provides REQ# and Buyer Queue for any REQ that does not have a sequence #1; to eliminate review for "orphan" lines
5. Allow print preview feature in Banner showing full page PO prior to print to check formatting issues
6. Stop each necessity to "touch every line" for POs prior to completion; this occurs twice when processing a PO
7. Stop the auto-populate function in the Vendor ID field; if the requisitioner leaves it blank; when printing a PO, the system auto-populates the space with the last ID that was entered - this causes undue work to verify every ID entered
8. Make it possible to allow Vendor ID changes to a completed PO without canceling the PO and starting over
9. When a P&CS procurement officer uses a ProCard on behalf of a unit/department, there is no way to track this in Banner; enable a tracking mechanism in Banner for centrally procured credit card transactions.
10. Make email addresses and W9 information visible in PO screens FPAREQN & FPAPURR - P&CS and departments spends unnecessary time trying to discover if a W9 is already on file (or not) or if an entry into FTM2VND can be made

Additional Banner change may need to be submitted to SW Financial Systems:

1. Remove NSF checking/overriding at PO step if no financial changes have been made

Summary of Conclusions

The SUPER team's recommendations are designed to reduce time consuming manual work and redundant steps, increase transparency, improve knowledge sharing across the institution, and increase ease-of-use for end users. Most of these recommendations can be implemented at UAF through a change in internal procedures. These recommendations should be implemented without delay.

Additional recommendations, including moving to an e-procurement system and Banner changes, could require greater collaboration within the UA system and will need a strong commitment from UAF leadership to pursue.

Additional project teams and facilitation may be necessary to implement these recommendations.

A full summary of rubs, recommendations, and software analysis is included in the Appendix.

Appendix

Rubs

The team identified the following rubs, or inefficiencies in the current process, that prevent the above targets from being met:

- Lack of training for some with ability to put in requisitions/account codes
- Lack of understanding of process
- Insufficient information
- ProCard limits low
- Lack of training
- Workarounds encourage questionable purchasing practice (split purchases)
- Blanket POs are not tied to contracts or volume discounts
- Lack of accountability
- Properly developed scope of work is not defined/validated
- Lack of consistency
- Lack of clarity - drop in clauses, commodities not clearly defined, W9, commodity vs. service
- Lack of ability to attach online documents
- Lack of transparency in process
- Insufficient technical system or workflow
- Redundant step
- Incorrect information defaults in the system (Banner)
- Lack of communication
- Experts brought to the table too late
- Too many reviews or approvals needed
- Process not user friendly

Detailed Recommendations

Process Changes

1. **Use Amazon Smile for all University Purchases from Amazon:** Amazon Smile gives 0.5 percent of purchases to the customer's nonprofit of choice. By shopping on smile.amazon.com and selecting the University of Alaska Fairbanks (or UA Foundation) UAF could recognize \$4,000 per year in unrestricted revenue.
2. **Terminate LPOs** (Paper Limited Purchase Order, serves as blank check to enable same day purchases. Vendors do not like these and they are expensive and time consuming to process. Replace with departmental custodial cards (discussed below).
3. **One card system:** Eliminate separate travel cards and ProCards, which require double administrative work. UA would also be eligible for additional vendor discounts and rebates if business card use increases. In this budget climate, any opportunities for

reduced pricing or additional revenue is critical. Additionally, Procurement can make internal process changes (that UAF controls) to reduce requisitions for travel procurement and increase credit card use, which is traditionally much faster, by allowing lodging charges on ProCards. In the long term, moving to a one-card system (all UA procurement and travel on one-card) is most preferred.

- a. As a short term fix, before a one-card system is implemented, SUPER recommends that UAF Procurement & Contract Services allow lodging and rental car purchases on ProCards to reduce the delay in processing a requisition (REQ) and purchase order (PO) for these situations. This also limits the out of pocket expenses incurred by UA travelers.
- b. Currently, lodging expenses are only allowed on ProCards as an exception process (by request). In most cases, lodging expenses must be encumbered via a REQ and PO. The REQ-PO process takes days or weeks longer to complete compared to a ProCard transactional charge. This inability to charge a ProCard for lodging delays the travel coordinator workflow when it occurs and can be easily adjusted internally at UAF.
- c. The current ProCard administrator spends on average two hours per week working on exceptions to this procedure. This time excludes the time unit travel coordinators spend facilitating this process and tracking these expenses separately from other ProCard expenditures associated with the trip. Eliminating this unnecessary processing hurdle will increase unit and central staff productivity.
- d. Charging lodging and rental car expenses to a ProCard is not disallowed in regulations and would eliminate the REQ-PO process and inconsistency/slowness in many areas.
- e. Move to a one-card system for procurement and travel (all UA purchases): Using one card for travel, lodging and other purchases is more efficient, more user-friendly and can result in additional incentives. Currently the Procurement Office at UAF administers both the ProCard and travel card. Units manage and are asked to track individual travel card holder information and use; however, this is not fully a transparent process as travelers may apply for a travel card in some cases without the unit knowing. This double card system requires double the administrative work and maintenance. Consolidating the cards by moving to a one-card system will consolidate the administration, resulting in a more efficient and transparent structure with improved reporting capabilities.
- f. Moving all business related transactions to a common card will increase the rebate revenue UA receives for business use. UA currently receives 0.86 percent back in revenue incentives from the credit card company; this is driven by transaction volume. In a climate where generating new revenues is critical, this increase in the transactions on a single card will also allow for improved reporting and vendor negotiation to secure improved pricing options for high volume travel areas (e.g. improved airfare pricing, hotel deals, car rental).

4. ProCard limits raised to \$10K for departmental purchasers. ProCards facilitate faster, more efficient processing and eliminates multiple touchpoints and administrative time and effort for relatively small-dollar purchases. Throughout the SUPER process, the team has consistently found that ProCards are the most efficient purchasing method available to the university. Raising this limit frees procurement effort, both in the department and in the central office, for more value added activities such as ensuring best pricing. Additionally, increased transaction volume on the ProCard leads to increased rebates and has a significant positive financial impact to the university. The reduction in processing effort is worth approximately \$60 per transaction.

By raising the limit to \$10,000 instead of \$5,000, UAF could eliminate up to 635 requisitions and purchase orders, saving \$40,000 in processing time and effort plus generating close to \$40,000 in additional rebates. This change could be worth \$80,000 per year and would make the procurement processes decidedly more user-friendly.

Procurement Technicians should be allowed to use their ProCard up to their delegated purchasing amount. Currently, Procurement Technicians have a \$10,000 limit for ProCard purchases despite having purchasing authority of \$25,000. This mismatch in authority decreases the effectiveness and reduces the potential efficiency of the Procurement Technician program.

Roles and Responsibilities

1. NSF overrides- *Units should be delegated authority to manage NSF overrides and budget revisions.* An NSF error entirely halts the process twice- both in the REQ (where the department needs to receive an override from OFA in order to submit the REQ to central procurement) and in the PO (where central procurement must override manually for changes within 10 percent; changes beyond that level require a second override from OFA and, for restricted funds, OGCA).

SUPER recommends reducing NSF occurrences by changing system process and level of checks- by setting the NSF checking at a higher level (executive officer or unit). Additionally, SUPER recommends streamlining NSF overrides and budget revisions by delegating authority to unit business officers. Right now, that authority exists at a central level. We propose that we delegate this authority to the executive officer (unit) level, so that unit personnel are fully in control of their own budget management. For restricted funds, OGCA approval should be sufficient; approval by both OFA and OGCA creates double-work. Additionally, this prevents bottlenecks and build up of work due to absences in a single central office, lessening the impact to business processes across campus.

2. UAF Financial Services is ultimately responsible for obtaining W-9. The need for a W-9 occurs in order to issue payment, not in order to issue a purchase order. By



requiring the W-9 in the earlier stages of procurement, we create a roadblock to timely processing. While the ultimate need resides in Accounts Payable, a few circumstances dictate earlier action:

In the case of a new vendor, the department will request a W-9 (as it will be obvious when entering a requisition that the vendor is not in the system and hence does not have a W-9 on file) with directions to route to central procurement. Lack of a W-9 will not result in a kickback from central procurement to the department.

If Procurement and Contract Services determines in the course of a procurement that a W-9 is needed, they will notify the vendor that a W-9 is needed before payment can be issued and then proceed with processing.

3. Eliminate Procurement & Contract Services Review of Cash/Direct Payments.

Where the central role is solely that of a payment vehicle (e.g. honoraria, reimbursements, subscriptions, memberships, registrations, and invoice payments), the expertise for processing lies within Accounts Payable, not Procurement and Contract Services. SUPER recommends that these transactions are processed entirely within A/P rather than through a Procurement Officer. If Accounts Payable adopts ProCards for payments where accepted, greater efficiency here is possible. No value is added to the process by issuing a PO or approval from Procurement before payment is made. Note: this does not add additional work to Accounts Payable, it simply eliminates an unnecessary touch point and expense in Procurement and Contract Services.

Sharing of information

Goal: Improve customer satisfaction, service quality and consistency for all UAF procurement, from a department technician to the UAF Procurement Office. Provide useful procurement tools and templates for departments/units. Adopt best practices in the central procurement offices to ensure consistent application of requirements across departments. Create procurement experts. Clarify and actively communicate solicitation requirements. Build awareness of tools through the financial manager level to ensure knowledge is maintained regardless of administrative or technician turnover. Reduce administrative burden, provide clarity to the process, and to improve efficiency by reducing unnecessary steps.

1. Share tools that will help departments be successful, including:

- A. The new Department Purchase Request Form (DONE),
- B. High level overview of the process that is optional for all UA employees, with desktop references for departmental administrators who have substantial procurement duties.
- C. A Unit Best Practices Summary sheet (ex. keeping a central/shared pro card ledger to keep track of current commitments and stay ahead of Banner). (Completed, to be posted on new site).
- D. SOW Template to be posted on website.

2. **Roll out improved P&CS website** (IN PROGRESS, TARGET DATE: July 2015), including:
Departmental resources included in I, above
 - A. Visual guides to procurement process
 - B. Quick-guide videos to common topics
 - C. Frequently Asked Questions
 - D. Electronic forms
 - E. Definitions
 - F. Archived and searchable Tips & Tricks, by topic
 - G. Easy to adopt contract clauses
 - H. Templates: SOW, RFI, RFP, etc.
 - I. "Ask a Procurement Specialist" feature
 - J. Key timelines and dollar thresholds
3. **Revise and implement Banner Procurement training**, to provide needed context to the current information. (IN PROGRESS, TARGET DATE: 7/1/15).
4. **Include P&CS staff in the OGCA Harmonization meetings whenever equipment or services in excess of \$100k is planned on restricted awards** (IN PROGRESS, TARGET DATE: Immediate).
5. **Regular monthly or quarterly "all-hands" meetings between Procurement and Contract Services and Procurement Technicians** to ensure everyone is on the same page regarding current processes and expectations. These meetings will help PTs absorb the institutional knowledge of P&CS while P&CS will benefit from being up to date on departmental concerns and issues. (Implemented).

Streamline routing and approvals

1. **SUPER recommends, as a best practice for departments, a maximum of three touches at the department before a requisition is submitted to Procurement and Contract Services:**
 1. Requestor or Principal Investigator
 2. Procurement Technician or Fiscal Technician
 3. Business Manager or Fiscal Officer.

For purchases on restricted funds, the Procurement/Fiscal Technician should be trained to identify whether the purchase is allowable and funds are available before proceeding, so that the grant technician can simply be informed of the procurement, rather than needing to approve before it can advance through the process.
2. When a requisition is entered into Banner, if it has a **sensitive account code** on a restricted fund, a notification email is sent to the defined Grant Technician in Grants and Contracts to review and approve. This step adds an additional two days (on average) to the procurement process, and regularly results in repeating and duplicating work. SUPER recommends the following options to address this delay:
 - A. OGCA delegates approval of sensitive account code purchases to unit Fiscal Officers, beginning with those in high volume research units by adding the Fiscal Officers in the FRAGRNT Personnel screen with an additional 007 indicator.



- B. OGCA identifies a “fast track” list of departments with proven expertise, and automatically approves items from those departments without an additional review step, similar to UAF Travel processes.
- C. OGCA and unit representatives review the sensitive accounts list (2010, 2040, 2070, 2090, 2110, 2140, 2170, 2190, 2200-2499, 3005, 3007, 3008, 3010, 3017-3040, 3081-3095, 3111-3119, 3441, 3443, 3501-3520, 3661, 3662, 3900-3999, 4008, 4018, 4020, 4082, 4099, 4451, 4500-9999) to determine whether all any items should be removed.

Shared services

To maximize the value of the Procurement Technician (PT) program, SUPER recommends that trained PTs partner to serve multiple units (in a buddy or backup system). This ensures continuous levels of service in the units regardless of staff absences, eliminating delays caused by one person being out. This also builds expertise among PTs and departmental staff, who can share best practices and learn from each other’s units. For units that do not have a high enough transactional volume to require a dedicated PT, having the ability to partner with other low volume units (or a single high volume unit) would enable those units to benefit from the faster processing and expert level service regardless of size. A single requisition in a unit that rarely does one requires significantly more effort from both the department and central procurement than the same requisition processed by a high volume, expert unit.

e-Procurement Software Analysis

e-Procurement addresses one of the SUPER team’s key rubs in the procurement process, the lack of transparency for end users and departments. By leading users through the process in an intuitive way, it can reduce the need to contact departments or PIs for additional information, or “kick back” a requisition to an earlier step in the process.

Depending on implementation choices and customization, the process could ultimately eliminate the requisition step for departments: when selecting an item for purchase in the e-marketplace, the information shoots into Banner automatically and routes through to a purchase order. For purchases within a department’s purchasing authority, that do not have additional requirements, this streamlines simple purchases immensely. Implementing this level of access moves the role of Procurement away from basic approvals and pushing transactions through the process, freeing time for more value added steps in securing best pricing and recognizing savings.

With e-Procurement systems that include spend analysis as part of their package, opportunity may exist to eliminate the ongoing annual expense of EAB (\$90,000/year for UA, but UAF currently covers \$60,000/year), offsetting the cost of the e-Procurement system.

ESM Solutions- Preferred Option

Description	<p>ESM Solutions is a cloud based procurement system designed for public sector procurement. There are a series of modules that relate directly to various procurement activities - spend management and analytics, sourcing, procurement, invoicing, and contract management. ESM is able to integrate with Banner.</p>
Strengths	<p>ESM Solutions has the modules that UAF is looking for when it comes to an e-procurement system.</p> <p>ESM offers end-to-end procurement solutions as well as contract management, which were both highlighted by management in procurement as must-have features of any e-procurement system that is investigated for use at UA.</p> <p>Can integrate DocuSign documents that SUPER has designed into their workflow system.</p> <p>The many modules that ESM offers would allow UA to pick and choose which features to implement. ESM offers full implementation and on-boarding services.</p>
Risks	<p>ESM can integrate with Banner and Finance will need to be involved. Will this project be a high enough priority?</p>
Resources	<p>The team will need to develop new process, and agreements. As a procure-to-pay solution, ESM has built much of the business process with a user-friendly interface. They also have training materials which can be used directly or modified to meet UAF's needs.</p> <p>OIT programmers will need to build the bridge from ESM to Banner and, if approved, feeds to Banner Finance.</p> <p>Banner Finance, Grants and Contract, and Finance Departments would need to develop new business processes and agreements about responsibilities. OIT will need to build data extracts.</p>
Unanswered Questions	<p>(still awaiting pricing information)</p>
Usage	<p>Unlimited number</p>
Direct Costs Year 1: Software Consulting Total Annual Costs	<p>\$65,000 \$12,000 per module selected for integration purposes \$87,000 \$60,000+ depending on features selected</p>

Unimarket Collaborative Procurement	
Description	Unimarket Collaborative Procurement is an e-procurement provider that is also cloud-based and operates on offering various modules that allows for a customized e-procurement solution. Unimarket currently offers Software-as-a-Service (SAAS) to higher education institution and private sector business. Modules that Unimarket offers: e-Sourcing, e-Procurement (marketplace), Procure-to-Pay, Expenses, Invoicing.
Strengths	<p>Unimarket can integrate with Banner for reporting and real-time spend management tracking.</p> <p>Unimarket also has the contract management and e-marketplace that procurement management has tagged as high priority.</p> <p>Like ESM, supports workflows and content management (scanned documents).</p>
Risks	<p>UA would need to determine how to host this solution. We can opt to integrate to Banner, or we can host online in a cloud-based setting.</p> <p>Banner Finance and OIT will need to be involved if UA opts to integrate.</p>
Resources	<p>The team will need to develop new process, training materials, and agreements. As a laser point solution, Unimarket has built much of the business process with a user-friendly interface. They also have training materials.</p> <p>OIT programmers will need to determine how to build the extracts and, if approved, feeds to Banner Finance.</p> <p>Banner Finance, Grants and Contracts, and Finance Departments would need to develop new business processes and agreements about responsibilities. OIT will need to build data extracts.</p>
Usage	Unlimited number of people can use
Direct Costs Year 1:	
Software	\$ 40,000 - Solution Implementation
Consulting	\$ 5,000 + (per point Integration depending on modules selected)
Total	\$ 45,000 +
Annual Cost	\$ 42,500 +
	Unimarket is a cloud-based solution, so it's hosted by Unimarket. 1 FTE estimated to troubleshoot initially, possibly can be reduced to 1 PTE post-implementation and roll-out.

SciQuest	
Description	SciQuest offers e-procurement software that can be cloud-based.
Strengths	SciQuest can be integrated with Banner and allows real or near-time data for reporting purposes. SciQuest's solution for Higher Education was designed specifically for higher education, not altered for use from another application.
Risks	SciQuest can be a significant investment. During our investigative phase, it came to the team's attention that several other campuses that had implemented SciQuest were in the process of migrating to an alternate e-procurement vendor, primarily due to costs associated with the software suite.
Resources	<p>The team will need to develop new process, training materials, and agreements. As a laser point solution, Unimarket has built much of the business process with a user-friendly interface. They also have training materials.</p> <p>OIT programmers will need to determine how to build the extracts and, if approved, feeds to Banner Finance.</p> <p>Banner Finance, Grants and Contracts, and Finance Departments would need to develop new business processes and agreements about responsibilities. OIT will need to build data extracts.</p>
Unanswered Questions	Costs. Little to no information has been provided by the vendor about initial pricing and ongoing costs.
Usage Est.	Unlimited
Direct Costs:	Pending
Annual Costs:	

Survey Results (attached)

Performance evaluation by P&CS stakeholders, in order of importance to stakeholders:

PERFORMANCE	Performance Score	Importance Score
Performance: [The overall quality of customer service provided by P&CS is high.]	3.48	4.11
Performance: [Communications (via phone, email, etc.) with P&CS are answered in a reasonable amount of time.]	3.25	4.11
Performance: [P&CS is a professional and efficient organization.]	3.32	4.10
Performance: [The ProCard system is easy to navigate.]	3.56	4.07
Performance: [The ProCard guide provides relevant content.]	3.65	4.05
Performance: [P&CS provides adequate communications related to changes in policies or procedures, new contracts, and other activities.]	3.05	4.00
Performance: [I know whom to contact in the P&CS department to resolve a purchasing issue.]	3.33	3.97
Performance: [P&CS website provides relevant content.]	3.20	3.92
Performance: [P&CS is aligned with the goals of UAF and supports its institutions and departments.]	3.47	3.85
Performance: [I generally engage P&CS on large sourcing purchases.]	3.76	3.80
Performance: [P&CS website is easy to navigate.]	2.97	3.79
Performance:[P&CS obtains better pricing from suppliers for my department by combining and leveraging my spending with other UAF schools, departments and administrative units.]	2.76	3.45
Performance: [P&CS helps me stretch my budget dollars by reducing the cost of my purchases.]	2.70	3.41
Performance: [P&CS helps improve the quality of goods or services purchased.]	2.78	3.27
Performance: [I generally work with P&CS on small purchases.]	2.52	2.70

TRAINING	Score
[In general the responses from Procurement Officer to Procurement Officer are consistent.]	3.38
[The quality of training received from P&CS (not Banner Navigation) regarding the procurement process is relevant to my position.]	3.36
[The training provided by P&CS regarding the scope of work and contract administration is relevant to my position.]	3.27
[The training provided by P&CS is consistent.]	3.19

NOTES:

Scoring was on a scale from 1-5, with 1 = Strongly Disagree, 3= Neutral, 5= Strongly Agree
 N/A and "BLANK" responses were included in the average and grade as "neutral" (3).

Key:

Average score > 3.50

Average score from 3.00 to 3.49

Average score < 3.00