

CSCU | Students First

Planning Team	Fiscal Affairs – Purchasing Team
Meeting Date	Wednesday - June 21, 2017
Members Present	Boriss, Esther – WCSU Associate Director of Administrative Services Casamento, Charlene - CCSU Chief Financial Officer Claffey, George - COSC Chief Information Officer Kelly, Jim - TRCC Fiscal Administrative Officer Lundberg, Alessandra - QVCC Director of Finance & Administrative Svc. Orlomoski, Robin - NWCC Fiscal Administrative Officer Shea-Luzik, Cynthia - SCSU Manager – Procurement Services Tom Brodeur, CCSU Purchasing Manager

Meeting Notes

Handouts were distributed to the group from the Jaggaer Presentation including follow up questions/comments from Kyle Frant, Jim Howarth and Brenda Whalen.

1. **Aggregate Jaggaer Demo Follow Up Questions –**

- a. How does 1099 and foreign vendor reporting work in the AP module?
- b. Does Jaggaer offer 1099 services? Will we be able to print 1099 forms?
- c. When a vendor is on multiple contracts, which contract should be loaded?
- d. Can fields be customized (ex. Commodity codes)?
- e. Can SBE or preferred vendors be showcased when looking for products or services?
- f. How does one purchase a service or product not on a contract?
- g. Are (can) green products be showcased?
- h. Do we have the bandwidth to support Jaggaer?
- i. How will we be able to limit and/or monitor purchasing from a budgeting standpoint?
- j. .

Cost Benefit Analysis/Baseline Data Needed – ROI and cost vs. savings needs to be looked at. What is the true savings with going with Jaggaer? *People savings and spend savings.*

The System should move to a system of standardization. It was noted that we need better management of what we are purchasing. There is a want/need for more detail codes for reporting.

2. *Scope tasks Performed* –

Jim and Tom each shared an examination of purchasing data from Three Rivers and Central respectively showing the number and/or amount of money spent on specific vendors. Alessandra will run the same report as Three Rivers to see what the purchasing information looks like at system wide.

Cynthia passed out a Position Description for the Director of Purchasing for the group to look at.

Charlene passed out an example of a reports looking at Functions in our Current State, with Jaggaer and Banner 9 listing any savings benefit.

Charlene also passed out an example chart looking at different areas of expenses where we can look at percentages of our Total Spend, Degree in which Currently Managed, Potential Upside and Potential Savings.

Charlene shared with the group the Purchasing/PCard analysis from Chris Forster showing the percentage of time each employee (within the group) spends on specific tasks.

3. *What data do we need?* –

Alessandra will send out the most recent proposed Other Expense Account Codes for the group to look at.

4. *Position Description* –

Cynthia passed out a Position Description for the Director of Purchasing for the group to look at.