



Wesleyan University

HISTORY

The CTW consortium has a long history of sharing library resources across Connecticut College, Trinity College and Wesleyan University. In 2017, members of each institution's Finance offices began discussions on expanding the scope of collaboration to provide efficiencies and cost savings; taking advantage of similar back office operations and leveraging purchasing power save money.

The foundation for future collaboration resides with the implementation of a Purchasing Portal and Contract Management system. In addition to internal processing efficiencies, such a portal will facilitate reporting on total spend as a consortium, as well as align contract terms for group negotiation.

CTW OneSource utilizing Unimarket's eProcurement system

CURRENT ENVIRONMENT

- Decentralized Procurement
- Large number of vendors
- Limited adoption of standards across campus
- Multiple Amazon Prime accounts set up personally
- Multi line pcard vouchers that do not catch duplicate invoice numbers, limit ability to report on vendor spend and create many workflow paths resulting in duplicate approvals
- Low volume of “contracted” purchasing (WB Mason)
- Limited ability to report on purchases and create strategic pricing on high demand products

STRATEGIC BUYING

- Provide “one source” for on line purchasing with preferred vendors and contracted prices
- Source one product with a variety of vendors at one time (Grant Purchase Order requirement)
- Leverage one Amazon Business account
- **Create administrative efficiency by eliminating vouchers**
- Provide enhanced workflow by approving purchases prior to the purchase and options to route via product category (ex: technology, hazardous materials, office supplies).
- Eliminate attachments while providing more detail
- Enhanced reporting on spending habits to facilitate negotiations on strategic items

WORKFLOW

Levels

- <\$200 – Self Approval
- \$200 - \$1,000 Fiscal Manager/ACAF or Optional Additional Approver
- \$1,000 - \$5,000 – Fiscal Manager/Department Chair
- >\$5,000 – Cabinet

Important Notes

- All Executive areas have been given their current WFS Workflow to review.
- Budget checking happens at every approval and is not encumbered until the final approval.
- Approvers will receive a reminder email every 24 hours and it will escalate after 10 days.
- Deny only if the order should not be placed. Use “Comments” for everything else.
- Purchase Order created and purchase made only after final approval so approve timely and set a proxy!

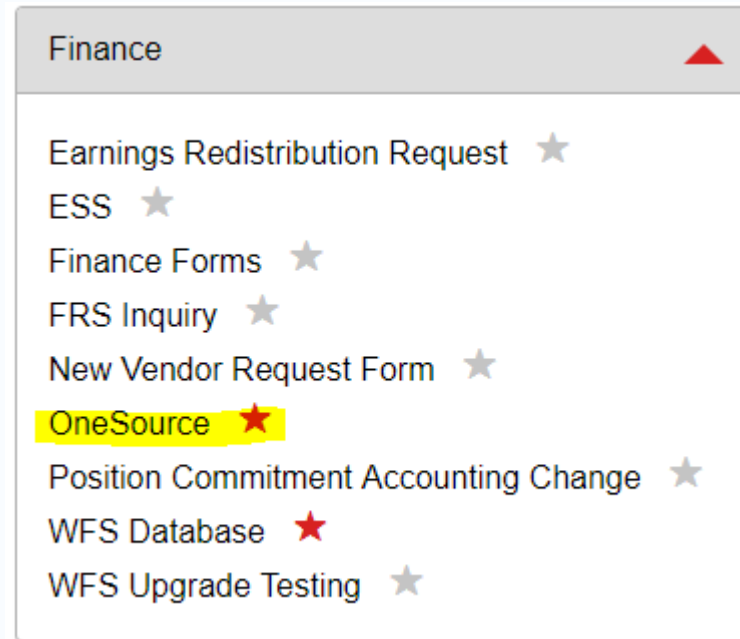
SUPPLIERS

<u>Priority</u>	<u>Category</u>	<u>Vendor Name</u>
1	General	Amazon
1	General	WB Mason
1	Scientific	Airgas
1	Scientific	Bio-Rad
1	Scientific	Carolina Bio
1	Scientific	Fisher Scientific
1	Scientific	Medline
1	Scientific	VWR
2	Technology	B&H
2	Technology	CDW
2	Technology	Dell
3	MRO	FW Webb
3	MRO	Grainger
3	MRO	Home Depot
4	Stationary	Dupli
4	Stationary	Hitchcock Printing
5	Misc	American Hotel Register / American Education Supply
5	Misc	Beckman-Coulter
5	Misc	EBP Supply Solutions
5	Misc	SHI International

TIMELINE

- Phase I – Pilot Group Training – May 29-31
- Phase II – Full Rollout – Fall 2019
- Phase III – Fiscal 20 – Contracts, Sourcing and Bidding

Production: WesPortal



Demo – <https://wesleyan.unimarket-demo.com/>

Training to Include

- **Amazon – initial login, carryover of order history**
- **Browsers – for some faculty and students**