



Managing what matters to you.

Legal Files' customization enables university procurement department to work the way it wants

Background

UConn is a Land, Sea, and Space Grant consortium institution which occupies over 4,000 acres, enrolls over 30,450 students and produces over 7,600 undergraduate, graduate, and professional degrees annually. The main campus is located in Storrs, Connecticut, and regional campuses are located in Avery Point, Hartford, Stamford and Waterbury.

The University's Contracting & Compliance group is part of the University's Procurement Services, which supports UConn's educational, research, and clinical missions through the strategic procurement of goods and services.

Contracting & Compliance drafts and negotiates most of the University's commercial contracts, such as software licenses; SaaS agreements; enterprise IT implementations; construction and engineering contracts; and agreements for the purchase of operational supplies, energy, consulting services, and scientific equipment.

The Challenge

Contracting & Compliance drafts over 750 contracts and amendments each year. On any given day, there are over 100 vendor relationships in one phase of the contracting process or another. "We were using spreadsheets to track contracts and manage workload," explained Contract Specialist Melissa M. Frank. "It was clunky and not in real time, but it was the best we could do." The cumbersome nature of their manual operations process prompted a search for an electronic contract management system.

(more...)

Customer Profile

University of Connecticut Procurement Services

- Contracting group for the University of Connecticut
- Responsibilities include contract management

Challenge:

- Using cumbersome manual system
- Tracking and managing numerous contracts & related deadlines
- Quickly sharing information or generating reports was problematic

Solution:

- Thought beyond "typical" contract management applications
- Worked together with Legal Files team members to customize a unique application that meets/exceeds requirements

Results:

- Experiences more ordered & efficient contract management
- Operates more efficiently as a team
- Generates up-to-date reports whenever wanted or needed

(cont'd from front...)

The Search

"We wanted a balanced system," said Eliezer "Eli" Strassfeld, Associate Director of Procurement Contracting & Compliance. Prior to evaluating systems, "we ended up focusing on three key requirements," Eli said. "One, we needed a centralized repository; one that could store emails, as well as documents. Two, we needed to track contract expirations; and three, we needed the ability to monitor and share the status of negotiations and other information that was important to our team."

Not only was it important for any team member to be able to view the status of a contract at a glance, but team members needed to be able to quickly determine details, such as what items were still open, the status of deliberations and negotiations, and the dates on which decisions were made. After conducting some initial online research, Melissa discovered Legal Files Software.

The Results

UConn found that Legal Files met all of the unit's original key requirements, Eli said. "Legal Files serves as our centralized repository, but it also links to Outlook which makes it easy to move documents and emails into Legal Files. We track our expiration dates, but the system also gives us the ability to track extension terms and the duration of each. If someone is out of the office, any of our end users can glance at a contract and easily determine what's been done and what needs to be done."

With proper permissions, "any one of our users can go into Legal Files and see where I left off, and pick up the project immediately," Melissa said. "Our stakeholders appreciate that kind of continuity from Procurement Services. Also, Legal Files helps us identify if any particular step in the process is taking too long."

Bottom Line

"We're probably not Legal Files' typical client, but because of its unique customization features and flexibility," Melissa said, "Legal Files fits us well."



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