Welcome to the Fall Business Managers Meeting

November 12, 2019
Today’s Agenda

1. OIT Voicemail Project
2. Removal of Authenticated Services and Two-Factor Authentication
3. Facilities and Management Billing Detail Site
4. Mail Room Services
5. Purchasing Updates
6. Contract Management Software – COLT
7. GLOW and Accounting Updates
8. Question & Answer Time
OIT Voicemail Project

Alonzo Wilson
W-Exchange Voicemail

A new voicemail system that integrates with W-Exchange email for faculty and staff. This is an exciting change and is a well-needed upgrade for collaboration and communication on campus.

wmich.edu/wexchange/voicemail
Voicemail Overview

- messages are **delivered to your W-Exchange email inbox** in addition to your traditional phone voicemail inbox
- there is **no limit** on the number of messages you can store in your voicemail inbox
- you can **easily access** and manage your messages from an email client, web browser, desk phone, smartphone, tablet and more
- you can **customize and manage greetings** with the same level of flexibility as accessing your messages
1. **Appropriate Contact**
   A collaborative departmental audit of phone service by OIT and a department representative such as a business manager, LAN manager or administrative assistant will need to be completed.

2. **Send/Return Audit**
   A telephone service representative will send out the audit. The appropriate contact will need to complete the audit and send it back.

wmich.edu/wexchange/voicemail
3. **Create Mailboxes**
   OIT telecommunications staff creates voicemail inboxes and prepares them for the department’s transition

4. **Schedule Transition Date with Department**
   A telephone service representative will work with the appropriate departmental contact to schedule the transition to W-Exchange Voicemail.
W-Exchange Voicemail
wmich.edu/wexchange/voicemail

Self-help
wmich.edu/helpdesk/voicemail

Telephone Service Representatives
wmich.edu/it/servicereps

Phone
(269) 387-4357

Email
oit-tcomcsr@wmich.edu

wmich.edu/wexchange/voicemail
Removal of Authenticated Services
and Two-Factor Authentication

Greg Lozeau

https://wmich.edu/it/policies/removalauthenticatedservices
https://wmich.edu/it/2fa
Facilities Management
Billing Detail Site

Monica Orsolini
FM Billing Detail
Website
November 12, 2019
FM Billing Detail Site

- Improve communication between FM and campus
- Easier for users to reconcile GLOW
- Ability for users to get sales order, work order and project information
Where to find the FM Billing Detail Site?

- Go to Facilities Management Website
- Then Administration tab on left
- Click on the **light bulb** clip art at bottom of page and will take you to:
  
  https://www.fm.wmich.edu/go/bo

- BroncoNet ID require to log in
- Bookmark page if you use often
Business Officers

BILLING DETAIL LOOKUP

Find a sales order:

Find a work order:

Sales Order number can be found on GLOW with a line showing:
"Sales Order: #######" sales orders are a number

Find a project number:

Work Order numbers can be found on GLOW with a line showing:
"Work Order: XX.########" work orders are a two-digit code, a dash, and a 6-digit number

Work Order numbers can be found on GLOW with a line showing:
"Project: #######" projects begin with a P or R, have a series of numbers, and they may end in a letter

REFERENCE GUIDES

Billing Detail Site Quick Reference Guide
Sales Orders common expenses

- Maintenance Stores’ purchases
- Fuel Charges
- Hits object code 4490
What will a Sales Order look like in GLOW?

<table>
<thead>
<tr>
<th>Date</th>
<th>Code</th>
<th>Order Number</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/31/2019</td>
<td>FM9JUL</td>
<td>SALES ORDER: 199720</td>
<td>.</td>
<td>290.49</td>
</tr>
<tr>
<td>07/31/2019</td>
<td>FM9JUL</td>
<td>SALES ORDER: 199723</td>
<td>.</td>
<td>493.98</td>
</tr>
<tr>
<td>07/31/2019</td>
<td>FM9JUL</td>
<td>SALES ORDER: 199955</td>
<td>.</td>
<td>66.29</td>
</tr>
</tbody>
</table>
Business Officers

Billing Detail Lookup

Find a sales order:
199955
Submit

Sales Order number can be found on GLOW with a line showing:
"Sales Order: #######" sales orders are a number

Find a work order:
Submit

Work Order numbers can be found on GLOW with a line showing:
"Work Order: XX-####" work orders are a two-digit code, a dash, and a 6-digit number

Find a project number:
Submit

Work Order numbers can be found on GLOW with a line showing:
"Project: #######" projects begin with a P or R, have a series of numbers, and they may end in a letter

Reference Guides
Billing Detail Site Quick Reference Guide
**QUERY SALES ORDER - WebTMA**

**Sales Order# 199955**

<table>
<thead>
<tr>
<th>SKU</th>
<th>Description</th>
<th>Qty</th>
<th>Unit</th>
<th>Cost</th>
<th>Ext'd</th>
</tr>
</thead>
<tbody>
<tr>
<td>555555-A</td>
<td>FUEL UNLEADED GASOLINE BLUE 87 OCT AMOCO</td>
<td>29.00</td>
<td>@ 2.2857</td>
<td>$ 66.29</td>
<td></td>
</tr>
</tbody>
</table>

**Transaction Date:** Jul 05, 2019  
**Account:** 46-0191120  
**Comment:** FM POWER PLANT DEPT 88 8400/PFUEL  
**Requestor:** *  
**Total:** $66.29

---

Facilities Management, Western Michigan University, Kalamazoo, MI 49008-5324 USA (269) 387-8566
Sales Order

Who can help users with questions?

- Wendy Schutz 7-8523 or Vicki Cox 7-8527
Work Orders

- Used to bill and/or track charges
- Hits object code 4390 (Most work orders) or 4988 (Transportation work orders)
## Work Orders Prefix

<table>
<thead>
<tr>
<th>WO Prefix</th>
<th>Area</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>S_</td>
<td>Maintenance Shop</td>
<td>S1, S2, S4, S8…</td>
</tr>
<tr>
<td>S0</td>
<td>Outside Contractor/MISC</td>
<td>Fees, contracts with outside</td>
</tr>
<tr>
<td></td>
<td>Charges</td>
<td>vendor</td>
</tr>
<tr>
<td>R1</td>
<td>Remodeling/Recharge</td>
<td>Remodeling Services</td>
</tr>
<tr>
<td>R2</td>
<td>Sign Shop</td>
<td>Sign Shop</td>
</tr>
<tr>
<td>XL</td>
<td>Lockshop/Public Safety</td>
<td>XL</td>
</tr>
<tr>
<td>L_</td>
<td>Landscape</td>
<td>LS, LM, LC</td>
</tr>
<tr>
<td>C_</td>
<td>Custodial</td>
<td>CA, CI, CC…</td>
</tr>
<tr>
<td>TS</td>
<td>Transportation</td>
<td>TS</td>
</tr>
</tbody>
</table>
What will Work Orders look like in GLOW?

<table>
<thead>
<tr>
<th>Date</th>
<th>Code</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/31/2019</td>
<td>FM9JUL</td>
<td>WORKORDER:S4-217172</td>
<td>.</td>
</tr>
<tr>
<td>07/31/2019</td>
<td>FM9JUL</td>
<td>WORKORDER:S4-217234</td>
<td>.</td>
</tr>
<tr>
<td>07/31/2019</td>
<td>FM9JUL</td>
<td>WORKORDER:S4-217236</td>
<td>.</td>
</tr>
</tbody>
</table>
**Business Officers**

**BILLING DETAIL LOOKUP**

- **Find a sales order:**
  - Sales Order number can be found on GLOW with a line showing: 
    - "Sales Order: #######" sales orders are a number

- **Find a work order:** S4-217236
  - Work Order numbers can be found on GLOW with a line showing: 
    - "Work Order: XX-########" work orders are a two-digit code, a dash, and a 6-digit number

- **Find a project number:**
  - Work Order numbers can be found on GLOW with a line showing: 
    - "Project: #######" projects begin with a P or R, have a series of numbers, and they may end in a letter

**REFERENCE GUIDES**

Billing Detail Site Quick Reference Guide
### QUERY WORK ORDER - WEBTMA

**Work Order# S4-217236**

- **Completed**  
- **Billable Work Order**
- **Requested:** May 21, 2019
- **Last Status:** Completed
- **Scheduled:** May 21, 2019 to ENVIRON. CONTROLPERSON
- **Priority:** 10 Days
- **Closed:** Aug 01, 2019
- **Area Location:** Office - 1209 051-1209
- **Account:** 11-7432200 Maintenance Services
- **Request:** Needs new valves and plumbed to coilMark/Moe
- **Last Posted:** Aug 31, 2019

<table>
<thead>
<tr>
<th>Description</th>
<th>Billed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Posted to GL on 08/31/2019</td>
<td>$485.33</td>
</tr>
<tr>
<td>1 line(s)</td>
<td></td>
</tr>
<tr>
<td>Posted to GL on 07/31/2019</td>
<td>$1,986.60</td>
</tr>
<tr>
<td>6 line(s)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>$2,471.93</td>
</tr>
</tbody>
</table>

**Work Order# S4-217236**
# Query Work Order - WebTMA

**Work Order# S4-217236**

<table>
<thead>
<tr>
<th>Completed</th>
<th>Billable Work Order</th>
<th>Requested: May 21, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Status: Completed</td>
<td>Scheduled: May 21, 2019 to ENVIRON. CONTROLPERSO</td>
<td></td>
</tr>
<tr>
<td>Priority: 10 Days</td>
<td>Closed: Aug 01, 2019</td>
<td></td>
</tr>
<tr>
<td>Area Location: Office - 1209 051-1209</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account: 11-7432200 Maintenance Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request: Needs new valves and plumbed to coilMark/Moe</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Last Posted: Aug 31, 2019

<table>
<thead>
<tr>
<th>Billed</th>
</tr>
</thead>
</table>

- **Posted to GL on 08/31/2019**
  - Labor
    - Labor through 08/31/2019
    - 1 line(s)
    - $485.33

- **Posted to GL on 07/31/2019**
  - Labor
    - Labor through 07/31/2019
    - Parts
      - ELBOW, 90, SWEAT, ST, COPPER, 1/2 (606666-B )
      - ELBOW, 45, SWEAT, COPPER, 1/2 (606533-B )
      - COUPLING, SWEAT, COPPER, 1/2", W/STOP (602527-B )
      - ELBOW, 90, SWEAT, COPPER, 1/2 (602752-B )
      - PIPE, TYPE L RIGID, COPPER, 1/2", 10 FT LENGTH (604502-B )
    - 6 line(s)
    - $2,471.93
Work Orders

Who can help me with questions?

- Monica Orsolini (7-8532)
- Tara Tresh (7-8524)
Find a Project Number

- All project charges billed through work orders and work orders will be listed.
- Projects start with P followed by two digits from the year project started, i.e. P190056.
- Charges on object code 4390.
What will a Project look like in GLOW?

<table>
<thead>
<tr>
<th>Date</th>
<th>Department</th>
<th>Project Number</th>
<th>Work Order Number</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/31/2019</td>
<td>FM3DEC</td>
<td>PROJECT:P180253 (WO:S0-115751)</td>
<td></td>
<td>5,655.31</td>
</tr>
<tr>
<td>12/31/2019</td>
<td>FM3DEC</td>
<td>PROJECT:P190002 (WO:XL-104521)</td>
<td></td>
<td>3,829.27</td>
</tr>
</tbody>
</table>
Business Officers

BILLING DETAIL LOOKUP

Find a sales order:
Submit

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Find a work order:
Submit

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"Work Order: XX-####" work orders are a two-digit code, a dash, and a 6-digit number

Find a project number:
P190056 Submit

Work Order numbers can be found on GLOW with a line showing:
"Project: ######" projects begin with a P or R, have a series of numbers, and they may end in a letter

REFERENCE GUIDES

Billing Detail Site Quick Reference Guide
Project# P190056

Project: PHY- First Floor Woman's Bathroom Update

Project Name: PHY First Floor Women's Bathroom Update
Project Description: The first floor women's bathroom improvements
Budget Amount: $10,000-25,000
Account: 11-745210
Location: New finishes, lighting, water basins, and ventilation affects; Ceilings modified, Paint or wall coverings, Flooring, Window treatments, Electrical, HVAC. assigned to department. Yes requester title: Facility Records Assistant tier: Construction Only
Building: 021

Request Date: Jun 03, 2019
Completed Date:

Account: 63-9811340 FY19 Misc Small Projects
Budget: $20,000.00

Manager: Rory Murphy
Actual Billed: $0.00

Requestor: Cora Broadhurst 7-8610
Pending: $4,686.86

Email: cora.d.martin@wmich.edu
Balance: $15,313.14

Associated Work Orders

<table>
<thead>
<tr>
<th>WO #</th>
<th>Description</th>
<th>Pending/Billed</th>
</tr>
</thead>
<tbody>
<tr>
<td>SC-117314</td>
<td>MISC items - MISC charges- vouchers, intra, procards, etc</td>
<td>$0.00 billed</td>
</tr>
<tr>
<td>PR-105293</td>
<td>PM time tracking - Used to track PM time on the project</td>
<td>$0.00 billed</td>
</tr>
<tr>
<td>PR-105294</td>
<td>Designer time tracking - Used to track designer time</td>
<td>$0.00 billed</td>
</tr>
<tr>
<td>PR-105295</td>
<td>Support time tracking - Track supporting time, such as engineering</td>
<td>$0.00 billed</td>
</tr>
<tr>
<td>SC-117805</td>
<td>Contracted Labor - Fire alarm work in women's restroom.</td>
<td>$2,507.89 pending and $0.00 billed</td>
</tr>
<tr>
<td>SC-116818</td>
<td>ENCUMBRANCE WO - Holding items that need to be held against budget, but not ready to bill</td>
<td>$0.00 billed</td>
</tr>
<tr>
<td>SC-117817</td>
<td>Materials - Materials for women's restroom.</td>
<td>$2,178.97 pending and $0.00 billed</td>
</tr>
<tr>
<td>7 WOs</td>
<td></td>
<td>$4,686.86 pending and $0.00 billed</td>
</tr>
</tbody>
</table>
Projects

- Who can help with questions?
  - Billing questions: contact Monica Orsolini 7-8532
  - Scope of work questions: Contact your project manager
WHAT is the role of the user?

- Please visit the site and see how it can help you and your department
- Contact FM Business Operations with questions and feedback, Monica 7-8532
- monica.orsolini@wmich.edu
Questions?
Mail Room Services

Elaine Frybarger
Logistical & Mail Services

Campus Services Building
1201 Oliver St
Kalamazoo, MI 49008
Mail Services

Updates:

• WMU Mail Services has switched mail processing vendors to Marana Group, effective May 2019.

• Sorting by Department Name then Mail Stop Code effective June 2019.

• New mail route effective May 2019.
<table>
<thead>
<tr>
<th>Building</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>School of Medicine</td>
<td>9:05</td>
</tr>
<tr>
<td>Unified/CDS</td>
<td>9:07</td>
</tr>
<tr>
<td>Walwood</td>
<td>9:13</td>
</tr>
<tr>
<td>Heritage</td>
<td>9:18</td>
</tr>
<tr>
<td>Sindecuse</td>
<td>9:25</td>
</tr>
<tr>
<td>Sangren</td>
<td>9:28</td>
</tr>
<tr>
<td>Ellsworth</td>
<td>9:35</td>
</tr>
<tr>
<td>BC</td>
<td>9:42</td>
</tr>
<tr>
<td>Henry</td>
<td>9:50</td>
</tr>
<tr>
<td>Admin</td>
<td>10:00</td>
</tr>
<tr>
<td>Reed Fieldhouse/SRC</td>
<td>10:10</td>
</tr>
<tr>
<td>Waldo Stadium</td>
<td>10:18</td>
</tr>
<tr>
<td>Transportation</td>
<td>10:24</td>
</tr>
<tr>
<td>Physical Plant / Custodial</td>
<td>10:30</td>
</tr>
<tr>
<td>Montague House (AAUP)</td>
<td>10:34</td>
</tr>
<tr>
<td>EWB</td>
<td>10:40</td>
</tr>
<tr>
<td>CHHS</td>
<td>10:45</td>
</tr>
<tr>
<td>Archives</td>
<td>10:50</td>
</tr>
<tr>
<td>Moore</td>
<td>11:25</td>
</tr>
<tr>
<td>Friedman</td>
<td>11:30</td>
</tr>
<tr>
<td>Sprau</td>
<td>11:34</td>
</tr>
<tr>
<td>Gilmore (Theater)</td>
<td>11:40</td>
</tr>
<tr>
<td>Miller Aud.</td>
<td>11:45</td>
</tr>
<tr>
<td>Trimpe</td>
<td>11:50</td>
</tr>
<tr>
<td>Kohrman</td>
<td>11:55</td>
</tr>
<tr>
<td>Kohrman (Art)</td>
<td>12:00</td>
</tr>
<tr>
<td>RCVA (Art)</td>
<td>12:05</td>
</tr>
<tr>
<td>Dalton</td>
<td>12:11</td>
</tr>
<tr>
<td>Wood</td>
<td>12:15</td>
</tr>
<tr>
<td>Faunce</td>
<td>12:20</td>
</tr>
<tr>
<td>Sustainability</td>
<td>1:40</td>
</tr>
<tr>
<td>Everett-Rood</td>
<td>1:45</td>
</tr>
<tr>
<td>Lee Honors</td>
<td>1:50</td>
</tr>
<tr>
<td>Kanley</td>
<td>1:58</td>
</tr>
<tr>
<td>UCC</td>
<td>2:03</td>
</tr>
<tr>
<td>Woodlawn (St. Aidens)</td>
<td>2:08</td>
</tr>
<tr>
<td>Fetzer</td>
<td>2:13</td>
</tr>
<tr>
<td>Haworth</td>
<td>2:17</td>
</tr>
<tr>
<td>Welborn</td>
<td>2:22</td>
</tr>
<tr>
<td>Parking Services</td>
<td>2:26</td>
</tr>
<tr>
<td>Lawson</td>
<td>2:30</td>
</tr>
<tr>
<td>Power Plant</td>
<td>2:35</td>
</tr>
</tbody>
</table>
Logistical Services

Logistical Services Requests

- New online request for services on wmich.edu/logisticalservices under both Freight and Mail Services options.
- Complete the form and Logistical Services will contact you with an estimated day/time of completion via email or calendar invite.
- Service Examples:
  - Requesting inter-office envelopes/postal supplies
  - Pick up/delivery of items within campus and outgoing mail/packages
  - Event supply pickup/drop off (career fair, fall welcome), etc.
Address Services

If you, or someone you support moves, don’t forget to fill out a change of address form at: https://wmich.edu/logisticalservices/mail/address-changes, print and send to Mail Services at MS 5347 or email to wmupostal@wmich.edu. This helps us keep your information up to date and avoids incorrect delivery/delayed delivery of mail and packages.

For incoming mail and packages, it is helpful if they are addressed as follows to ensure proper delivery:

<table>
<thead>
<tr>
<th>Individual Name</th>
<th>Dr. Edward Montgomery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Name</td>
<td>Office of the President</td>
</tr>
<tr>
<td>1903 West Michigan Ave</td>
<td>1903 West Michigan Ave</td>
</tr>
<tr>
<td>Kalamazoo MI 49008-mail stop</td>
<td>Kalamazoo MI 49008-5202</td>
</tr>
</tbody>
</table>
Mail/Logistical Services
Contact Information

• Elaine Frybarger - Mail Services: 7-8812
• Steve Verity - Freight Scheduling: 7-8811
• Rachel Davis/Andy Meulman - Receiving: 7-8819
• Rachel Roach - Supervisor: 7-8817
Logistical Services

Questions???
Purchasing Updates

Wendy Vander Meulen
Purchasing Department Updates

November 12, 2019
Agenda

• Bid Policy
• Exceptions to Bid Policy (New!)
• Cooperative Contracts
• Federal Procurement Standards
• Questions?
Bid Policy

**< $5000**
- Does not require involvement of Purchasing Department
- Departments may purchase goods or services without providing quotes or conducting a bid.
- Any T&Cs still must go through Business Services & Legal Review

**$5-10K**
- Requires involvement of Purchasing
- Departments must complete & submit a Purchase Requisition Form
- Department must provide three quotes (Purchasing can assist)
- Purchases requested from a single / sole source must be accompanied by a Sole Source Justification Form

**$10K+**
- Requires involvement of Purchasing
- Departments must complete & submit a Purchase Requisition Form
- Purchasing must conduct a competitive bid process
- Purchases requested from a single / sole source must be accompanied by a Sole Source Justification Form
Exceptions to Bid Policy

• Time & Material Contracts
  • Contracts for hourly rates
  • Mostly for skilled labor/contractor
  • Occasionally include professional services, such as architecture or engineering
  • Nearly always used in conjunction with Facilities Management (projects

• Cooperative Contracts

• New! University bid category exceptions

• Purchases with additional requirements
  • Grants (require Grants & Contract approval over $25K)
  • Federal Grants
Cooperative / Consortium Contracts

• WMU is a member of several purchasing cooperatives
  • E&I (Educational & Institutional): US Colleges, Universities, K-12
  • GSA: State, local, tribal governments
  • HPS (Hospital Purchasing Services): 4000 members across 22 states
  • MiDeal: Michigan government entities
  • MHEC (Midwestern Higher Educational Compact): Regional colleges and universities
  • Sourcewell: Government, education, non-profits across the US
  • U.S. Communities Government Purchasing Alliance: Government, education, non-profits across the US

• Cooperatives competitively source goods and services on behalf of their members

• Members typically receive superior pricing and/or contract benefits due to the leverage of all member spend through a cooperative

ALL WMU DEPARTMENTS
HAVE ACCESS TO COOPERATIVE CONTRACTS!
Cooperative / Consortium Contracts Continued

- Contract Categories & Examples:
  - Athletics
  - Automotive/Transportation/Equipment
  - IT/Software
  - Food Service
  - Furniture
  - Maintenance
  - Office Supply
  - Lab/Medical Supply
Cooperative / Consortium Contracts Continued

• How to use:
  • Cooperatives listed on WMU Purchasing Website under “University Contracts”
  • Click link to cooperative website to search available contracts
  • Contact the cooperative/sign up for more information OR contact the Purchasing Department for assistance
  • Follow standard procedures and purchase via pro card or submit a Purchase Requisition through Purchasing to initiate a PO / Vendor Contract
    • **Purchase does NOT require three quotes or bid – allowed to bypass bid process**
  • Coming Soon: Updated Purchasing website with a complete listing of cooperative contracts and direct links to those contracts
Exceptions to Bid Policy

• New list of exception categories that do not have to follow bid policy
  • Focus purchasing policy on goods and services that benefit from the process
  • Document certain existing University practices
  • Does NOT include any purchase related to federal funds
  • Purchases still have to be approved departmentally!

• Exception list available on WMU Purchasing website, under Policies and Procedures

• Examples:
  • Artists, speakers, performers
  • Books, online subscriptions, periodicals for University Libraries
  • Food products and supplies for University Dining Services
  • Employee training
  • Employee moving expenses
  • Postage

• Questions, Concerns, Additions? Contact WMU-Purchasing@wmich.edu
Federal Procurement Standards

• ALL purchases made with Federal funding must follow Federal Procurement Guidelines (including under $5000)

• Guidelines include:
  • Procurement process rules
    • Bidding
    • Advertisement to bid
    • Sole source restrictions
  • Utilization of federal surplus, if applicable
  • Contract provisions

• Resources:
  • Purchasing Department and Purchasing Website
  • Electronic Code of Federal Regulations

PROCUREMENT STANDARDS FOR FEDERAL AWARDS

All purchases made by the University with federal grant or contract funds must comply with all standards set by the Federal Office of Management and Budget - Uniform Administrative Requirements, Cost Principles, & Audit Requirements for Federal Awards; Title 2, Subtitle A, Chapter II, Part 200 - Procurement Standards Sections 200.317 through 200.326. The complete policy can be found at the Electronic Code of Federal Regulations website. All purchases related to federal funds are documented and tracked internally by the University.
Contacts

• General email: WMU-Purchasing@wmich.edu
• Purchasing Contacts
  • Wendy Vander Meulen, Director  x78804
  • Nick Cutler, Manager x78842
  • Jackie Michels, Buyer x78805
  • Teri Dunithan, Purchasing Assistant x78802
Questions?
Contract Management Software

“COLT”

Jessica Swartz
Michele Cole
INTRODUCING COLT
Contract Organization and Lifecycle Tool
How We Got Here

- Presidential Transformational Initiative proposal in October 2017
- Selected software (Jaggaer) in Fall 2018
- Implementation team meeting since December 2018
- Go Live November 2019
What’s Going to be in the System

• Academic Agreements
• Business Agreements
• Research Agreements
What’s Not Going to be in the System

- ICs
- Employment Agreements
- Purchasing/procurement process
Sneak Peak
### Sneak Peak

#### Contract Search Results

<table>
<thead>
<tr>
<th>Contract ID</th>
<th>Description</th>
<th>Second Party</th>
<th>Contract Type</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Version Type</th>
<th>Renewal No.</th>
<th>Amendment No.</th>
<th>Extension Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>AA-COOP-0040-2020</td>
<td>Free Puppies</td>
<td>ABC Company</td>
<td>Cooperative Agreements</td>
<td>Pending Approval</td>
<td>10/1/2019</td>
<td>2/25/2020</td>
<td>Original</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>SA-BUS-BF-DSVC-0117-2020</td>
<td>SA Rain Delay</td>
<td>Free Puppies and Kittens, inc.</td>
<td>Departmental Services Agreement Non-Sponsored (WMU is performing the work)</td>
<td>Draft</td>
<td>–</td>
<td>–</td>
<td>Original</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
# Sneak Peak

(instead of checklist)

<table>
<thead>
<tr>
<th>Additional Contract Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rate</td>
</tr>
<tr>
<td>PeopleSoft PO/VC Number</td>
</tr>
<tr>
<td>FOIA Notification Required</td>
</tr>
<tr>
<td>Foreign Partner</td>
</tr>
<tr>
<td>Export Control Review Complete?</td>
</tr>
<tr>
<td>FERPA Implications</td>
</tr>
<tr>
<td>Country</td>
</tr>
<tr>
<td>Whose Contract Are You Using? *</td>
</tr>
<tr>
<td>WMU Contract - Unedited</td>
</tr>
</tbody>
</table>
# Sneak Peak
(instead of checklist)

**WMICH-FUA-0084-2020**  
**Type:** Facilities Use Agreements  
**2nd Party:** Bingo Was His NameO  
**Dates:** 10/8/2019 - 1/31/2020  
**Version:** Renewal 0, Amendment 0  
**Total Contract Value (TCV)**  
TCV: **0.00 USD**

### Contracts for Goods and Services Review Checklist (Required)

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is there a Confidentiality Clause?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does this Contract include the purchase or renewal of hardware, software or services related to any information technology? If YES, please review the Information Technology Acquisition Policy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you accepting credit cards for payment under this Contract? If YES, you must have PCI approval before submitting.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is this a long standing Contract or renewal of an existing Contract? Have there been any substantive changes since either Business Services or Legal last reviewed it? If YES, please identify the changes.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WMUs name on the</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Sneak Peak
(Where in the world is my contract?)
GLOW and Accounting Updates

Josh Renoos
Anna Kniffin
Accounting Services Updates
• The Governmental Accounting Standards Board
• New GASB for Lease reporting
• Do you have leases?
• Doesn’t have to have the word “Lease” to be a lease according to GASB
Endowments and Funding Deficits

- Endowment Spendable balances are calculated in July
- Spending buckets only change if there is a significant decrease in the market
- Fund your deficits!
General Accounting Updates and what we’re working on

- GLOW Training
  - Semi-Annual
  - First one on 11/19/2019
- New JES & BES
  - On PeopleSoft
- GLOW Updates
  - Migrating to PeopleSoft FY2021
- Account Codes
- Reporting
Upcoming Trainings

Be on the lookout for registration emails:

• Semi-Annual GLOW Group Training
  • Sangren 2330
  • 11/19/2019 10:00-12:00

• GLOW for Grants
  • Schneider 2230
  • 12/3/2019 9:00-10:30
  • 12/4/2019 2:00-3:30

• PSSO Excel Lunch & Learns
  • Schneider
  • 12/6/2019
  • 12/13/2019
Question & Answer Time
Thank you for attending!