Customer Success Story | Higher Education

University of Northern Colorado

University tackles contract management challenges with OnBase case management

The Challenge

Effective contract management is critical to managing relationships, mitigating risk and ultimately saving an institution money. But for the University of Northern Colorado (UNC), the process was plagued with paper and inefficiency.

"We had a very inconsistent process for managing contracts on campus," says Cristal Swain, assistant legal counsel and chief procurement officer. "There was a lack of transparency. Nobody really knew where anything was in the process."

To bring visibility, compliance and control to its contract management process, the university turned to OnBase by Hyland.

The Solution

With OnBase, UNC streamlined the entire contract lifecycle, from request to contract execution and beyond. The solution – which leverages the case management, process automation and content management capabilities of the OnBase platform – provides the university with the transparency and control it previously lacked.

The benefits begin with a consistent contract request process. Requestors across campus complete self-service electronic forms, with dynamic fields that change depending on the type of contract they're requesting. This ensures all required information is collected up front – minimizing the need for contracting staff to chase down requestors for more details. Requestors easily view the status of their request at any given time, gaining much-needed visibility into the process.

CUSTOMER
University of Northern Colorado

INDUSTRY
Higher Education

SIZE
12,000 students

LOCATION
Greeley, Colo.

ONBASE INTEGRATION
Banner by Ellucian

DEPARTMENT USING ONBASE
Procurement

SOLUTION
OnBase for Contract Management

One platform **Unlimited potential**

OnBase®
by Hyland

With OnBase, UNC streamlined the entire contract lifecycle, from request to contract execution to renewal.

All information on the request form automatically creates and populates a contract record in OnBase. Case management capabilities empower the contract team with a complete, 360-degree view of all contract-related information and supporting documents, allowing them to better manage requests.

OnBase also provides clarity into contract workloads. In the past, it wasn't uncommon for two or three contract leads to unknowingly draft the same contract at the same time. The solution eliminates this duplicate work, automatically assigning, notifying and delivering requests to the correct contract lead.

In addition to managing third-party contracts like vendor agreements, contract leads can quickly and easily create new contracts using document composition capabilities. Staff choose from more than 10 templates to automatically generate contracts, pulling in key information from the contract record and leveraging a fragment library with updated, approved language.

As staff make changes during contract negotiations, OnBase allows them to save revised contracts as new versions, all while tracking past versions. Previously, staff managed revisions using network folders on a shared drive, making access and version control a challenge.

After reviewing or creating a contract, contract leads deliver it for final review and approval – with automatic email notifications to alert the appropriate parties. The solution supports compliance with university policies during internal review. For example, contracts over $50,000 are automatically sent to general counsel for legal oversight and technology–related requests are simultaneously delivered to the IT department to improve visibility.

UNC stores fully executed contracts in OnBase so that authorized individuals may easily retrieve them.

Finally, OnBase equips the contract team to proactively manage critical contract expirations. Automatic notifications and a calendar view of key contract dates prompt staff to take action and make timely decisions on contractual relationships.

"I can now finish a contract from start to finish in as little as 10 minutes – and we've been able to eliminate the vast majority of paper from our contracting process."
– Cristal Swain, assistant legal counsel and chief procurement officer

The Difference
Improves consistency: "We've been able to add consistency to the contract process so staff don't have to think about every single step and potentially miss one," says Swain.

Increases transparency: OnBase provides a complete view of the contract lifecycle and relevant information for all involved, from requestors to contract leads to IT.

Supports compliance: With OnBase, UNC enforces standard contract language and better manages critical expirations and renewals. A more efficient renewal process equips the university to comply with Colorado's taxpayer compliance laws, which prohibit schools from contracting beyond one fiscal year.

Provides a platform for enterprise expansion: "One of the things we liked about OnBase is that it can be so much more than a contract management system," says Swain. "We plan to use the workflow automation and case management functionality in other areas on campus."

Learn more at **OnBase.com/Contract-Management ››**

OnBase® by Hyland