Contract Management User Training

Table of Contents

Contract Management User Training

I. Overview

The purpose of the training guide is to provide instructions on how to use the contracts module of SLCCBuy to begin, manage, sign, and search for a contract.

Additional Resources

i. **Contract Review and Signatory Authority Rules**: *Provides detailed information on defining a procurement versus non-procurement contract and authorized approvers.*

ii. **Contract Review and Signatory Authority Policy**: *Provides SLCC rules and regulations.*

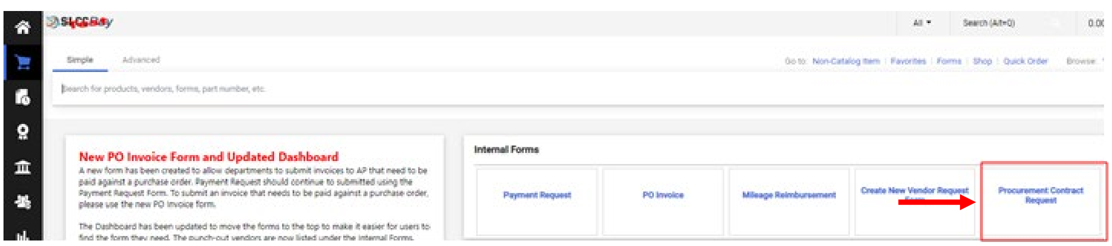
iii. **Risk Management Office:** *For additional questions not answered through the rules, policy or training resource, email contracts@slcc.edu.*

II. How to Submit a Procurement Contract Request

A procurement contract requires an expenditure of SLCC funds, regardless of amount.

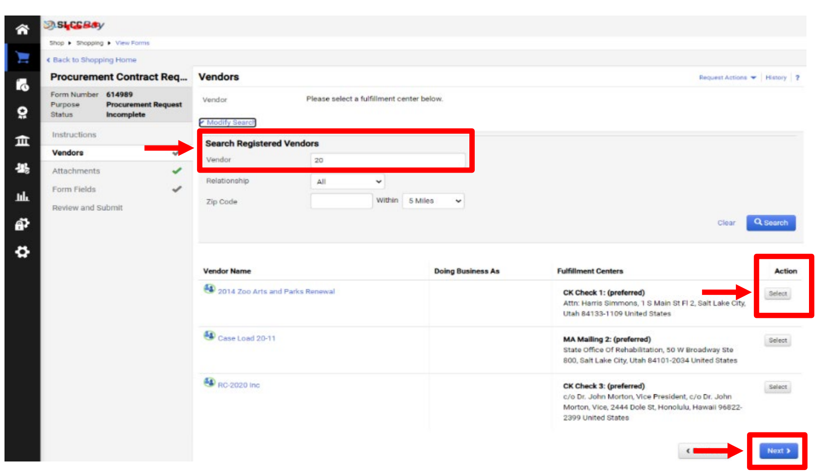
Step 1. In SLCC Buy, on the home page, find “Internal Forms”, click “Procurement Contract Request”.

Note, if the vendor is not already in the system you will first need to fill-out a “Create New Vendor Request Form”.



Step 2. Read the instructions carefully. Click “Next” to move on.

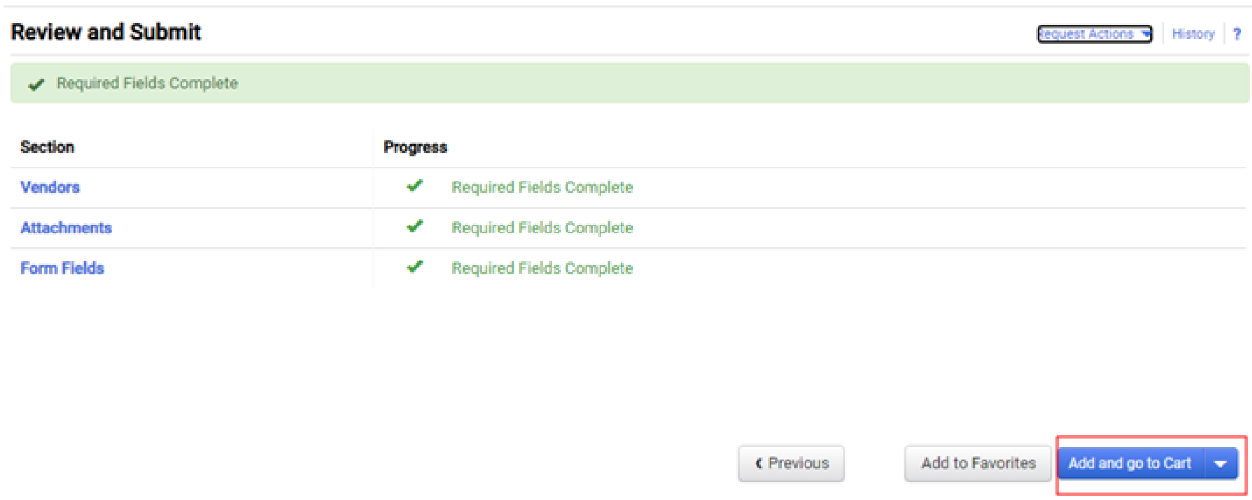
Step 3. Search for the vendor and select the correct vendor. Click “Next”.



Step 4. If applicable, use the attachments section to upload documents, such as a copy of a vendor supplied contract or a scope of work, then click "Next".

Step 5. In the "Form Fields" section, complete the information as prompted. Click "Next" when you are done. Note that some contract types have multiple pages of questions to complete. After completing each page, click "Next"

Step 6. In the "Review and Submit" section, you will see if all fields have been answered. If you missed any required questions, you will be notified here.



Step 7. To submit the procurement contract request, click "Add and go to Cart".

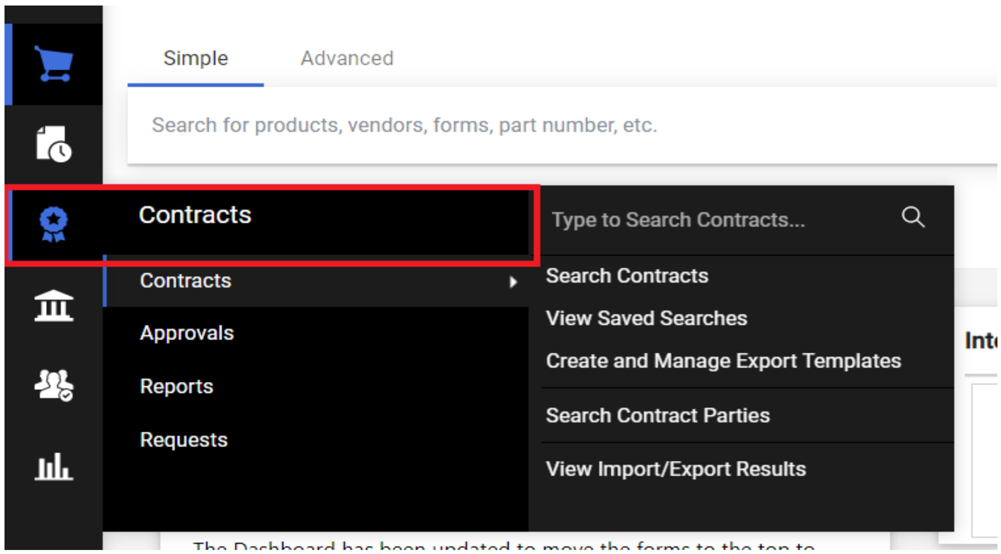
Step 8. Click on "Proceed To Checkout". If you do not have Banner Finance Access or you are a BCM, click "Assign Cart" and assign as appropriate.

Step 9. Enter the appropriate "Index" and "Account". Click "Submit Requisition".

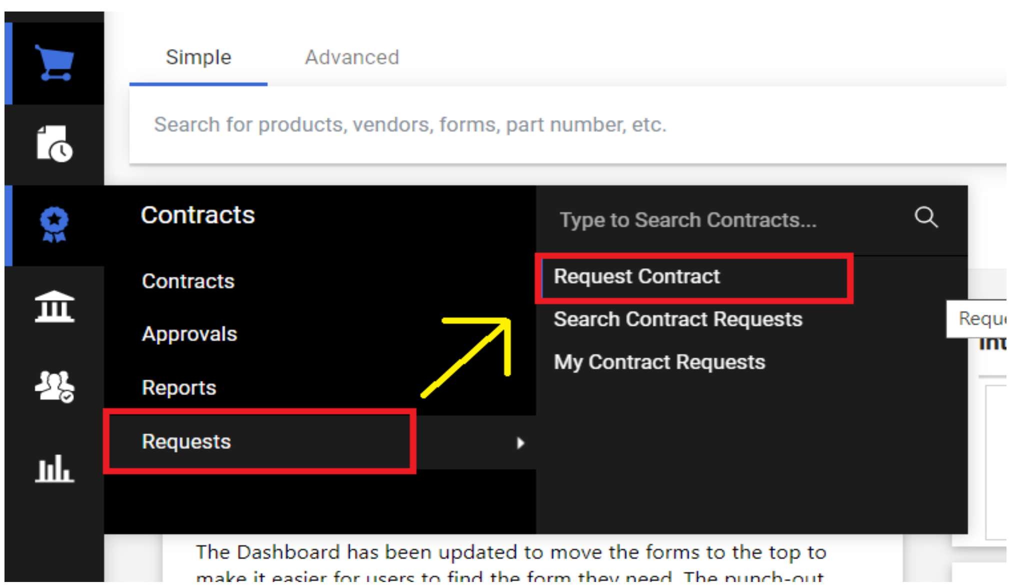
III. How to Submit a Non-Procurement Contract Request

A non-procurement contract doesn't require the expenditure of SLCC funds. Some examples are MOUs, NDAs, Affiliation Agreements, Filming Location Agreements, etc.

Step 1. Click the badge icon in the toolbar on the left side of the screen. This will open the "Contracts" menu.

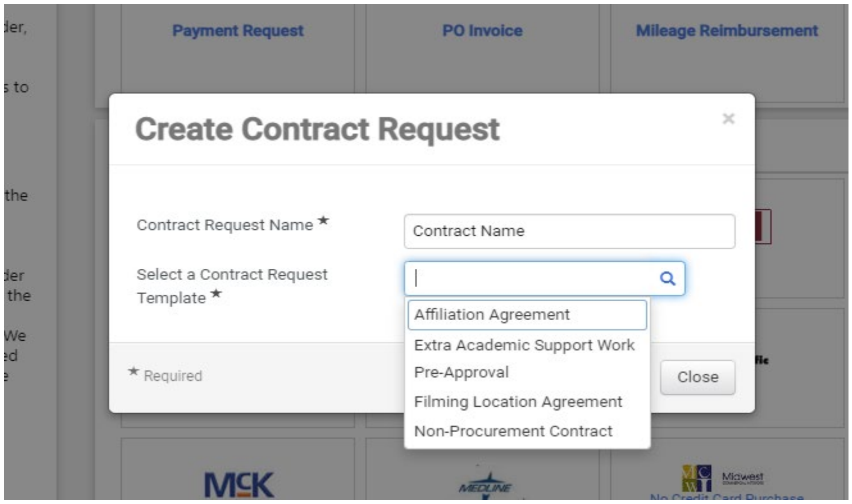


Step 2. In the Contracts menu, click "Requests" and then "Request Contract".



Step 3. A box titled "Create Contract request" will pop up. Fill in the "Contract Request Name" and choose the appropriate "Contract Request Template" from the drop-down menu. Click "Submit" to go to the next page.

Note, the "Contract Request Name" should match the legal name of the contractor.

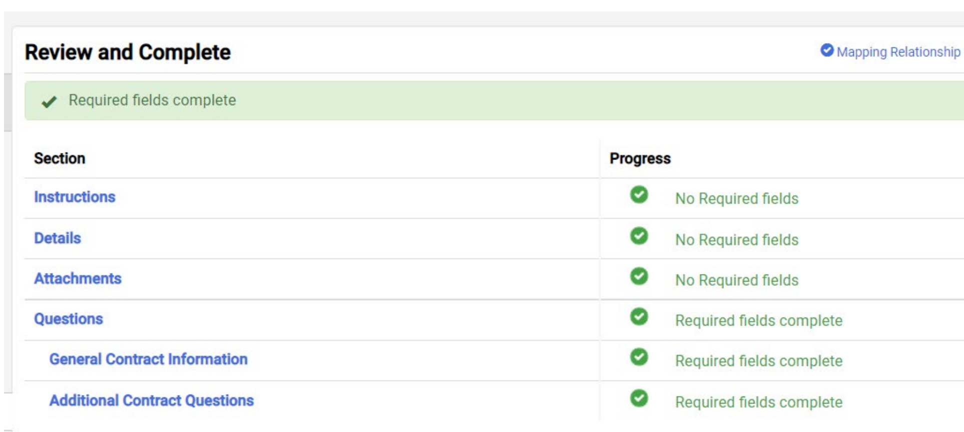


Step 4. Read the instructions carefully. Click "Next" to move on.

Step 5. If applicable, use the attachments section to upload documents, such as vendor supplied contracts. Otherwise click "Next" to skip.

Step 6. In the "Questions" section, complete the information as prompted. Click "Next" to go to the final page.

Step 7. In the "Review and Submit" section, you will see if all fields have been answered. If you missed any required questions, you will be notified here.



Step 8. To submit the contract request, click "Complete Request".

IV. How to Approve a Contract

A. **Procurement contracts** go through the standard requisition workflow. Instructions for approving requisitions can be found on the SLCCBuy tutorial documents page.

B. **Non-Procurement contracts** require approval from the appropriate executive cabinet member.

After the contract request originator has answered the required fields in the form and clicks submit, the approver (applicable VP or Provost) will receive a notification email from SLCCBuy.

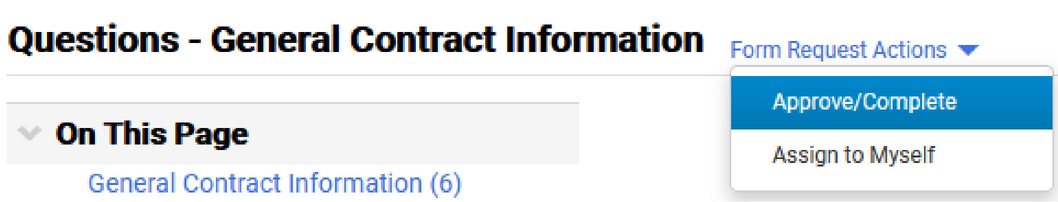
Step 1. Click the link in the email to view the contract request. The contract request can also be found in SLCCBuy by clicking on the flag icon in the upper right corner and selecting “Contract Request Approvals”.

Step 2. Once in the contract request form, review the sections prior to approval.

a. **“Attachments” Section**
   i. Not every request will have attachments. Requests for contracts that utilize a standard SLCC template will not have an attachment.
   ii. A contract using the approved template will be created by the Contract Coordinator in Risk Management after obtaining approval.

b. **“Questions” Section**
   i. This section contains the content that will be used to populate the final contract.
   ii. If there are questions on the answers provided by the originator, you may comment directly in the request, connect with the originator, or cancel the request and have the originator resubmit.

Step 3. To approve the contract, select “Approve/Complete” button from the “Form Request Actions” menu located at the top of the form.



V. How to Check the status of a contract request

A. Procurement Contract

Step 1. Click the “Orders” icon on the side menu. Navigate to “My Orders” and click “My Requisitions”

a. If you did not enter the requisition/contract request, you can search using the search requisitions feature.

Step 2. The “Requisition Status” will be displayed in the search results.

Step 3. To see which workflow step the requisition is in, click the “Requisition Number”. The workflow is displayed on the right side under “What’s next?” If the workflow is not displayed, click on “What’s next” to expand it. Completed steps will have a check mark next to them. The active step will be blue with the location icon and have the text “Active” under it. Future steps will have an empty circle and the work “Future: under them. To see the individual assigned to the step, click on the step.

Step 4. The contract review process is part of the procurement process. The requisition will be approved once the procurement process and contract review process has been completed. Once the contract is signed, the contract number will be visible on the requisition under the line item.

B. Non-Procurement Contract

Step 1. Click the “Contracts” icon on the side menu. Navigate to “Requests” and click “My Contract Requests”.

Step 2. A list of all contract requests will be displayed. You can filter the displayed requests by their status by clicking the “Filter Contract Requests” link. It is recommended that you set your filter to include all statuses. The status and the workflow step will be displayed for each request.

a. “Approved” means the request has completed approval workflow is awaiting contract creation by Risk Management.
b. “Incomplete” means the request has not been completed and submitted.
c. “Rejected” means the request has been rejected by an approver.
d. “Returned” means the request has been returned by an approver.
e. “Under Review” means the request is in approval workflow.
f. “Completed” means the request has been approved and a contract has been created by Risk Management. Click the “Contract Request Name” to check the status of the contract and proceed to Step 3.

Step 3. Click on the “Contract” number on the left side. The status of the contract will be displayed at the top.

a. “Draft” means the contract has been created by Risk Management and is being prepared for review.
b. “Internal Review” means the contract is being reviewed internally by Legal, Risk, or other SLCC department.

c. “External Review” means the contract is being reviewed by the contractor.
d. “Pending Signature” means the contract has been sent out for signature.
e. “Executed” means the contract has been signed by all parties.

VI. How to Sign a Contract

The signer will receive an email from “Contracts <adobesign@adobesign.com>” when a contract is pending signature.

Step 1. Click the “Review and Sign" link in the email.
Step 2. Complete the fields as prompted.
Step 3. To complete signing, hit the “Click to Sign” button.

The signer(s) will receive a copy of the fully executed contract by email.

VII. How to Search for a Contract

Step 1. Click on the badge icon in the side menu. Select “Contract” and click on “Search Contracts”
Step 2. Enter the search criteria. Note that procurement contracts will be Active for Shopping and non-procurement contracts will be inactive. You can switch between Advanced and Simple Search by clicking on the link on top right.
Step 3. Click Search at the bottom.
Step 4. A list of contracts that meet your criteria will be displayed. The contract status will also be displayed. The possible statuses are as follows:

a. “Complete” means the contract has reached its end date and is expired. The contract can be re-executed or extended.
b. “Draft” means the contract has been created by Risk Management and is being prepared for review.
c. “Expired” means the contract has reached its end date and is expired.
d. “Executed” means the contract is currently active.
e. “Internal Review” means the contract is being reviewed internally by Legal, Risk, or other SLCC department.
f. “External Review” means the contract is being reviewed by the contractor.
g. “Pending Signature” means the contract has been sent out for signature.
h. “Superseded” means the contract has been replaced with a new version.
i. “Terminated” means the contract has been stopped before the scheduled end date.