



Requesting Contracts Electronically in Total Contract Manager

New Process

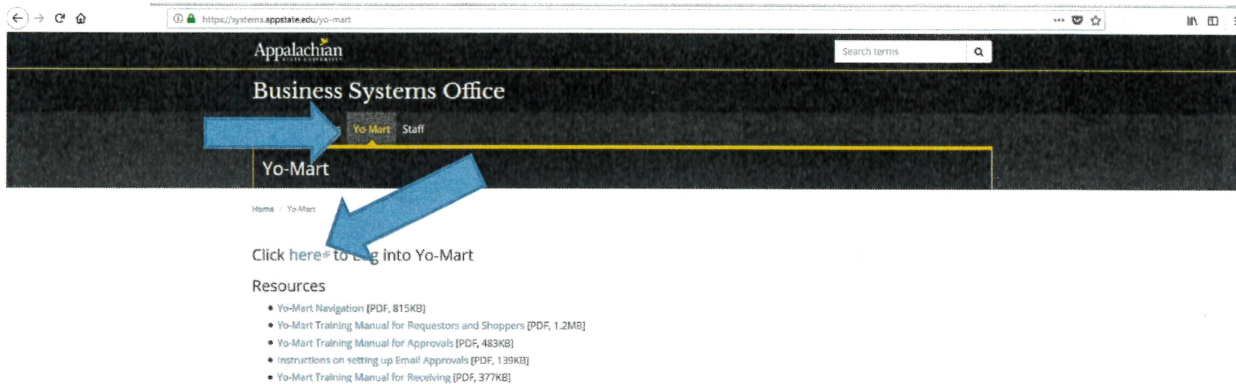
ASU is introducing a new software platform for contract management called Total Contract Manager (TCM). The end-goal of this implementation is to consolidate all non-employment university contracts into one application that is user-friendly for contract requestors, approvers, our legal office and contract signature authorities. TCM provides the University the potential to go paperless in our contracting processes beginning with a contract request which allows dynamic approvals, negotiation/red-line and finally ending with an electronic signature. TCM is provided by the same company that makes our YoMart software (JAGGAER, formerly SciQuest) so we hope the software platform will have some baked-in user friendliness for our campus.

Quick Points on the New Process

- Vendors we are contracting with must be in YoMart before we begin the TCM contract request process. If your vendor is not in YoMart, contact the Controller's Office before beginning a contract request. More information on this is in step 4 of the next section.
- TCM can handle processing ASU contract templates and 3rd party contracts.
- TCM uses DocuSign for electronic signature.

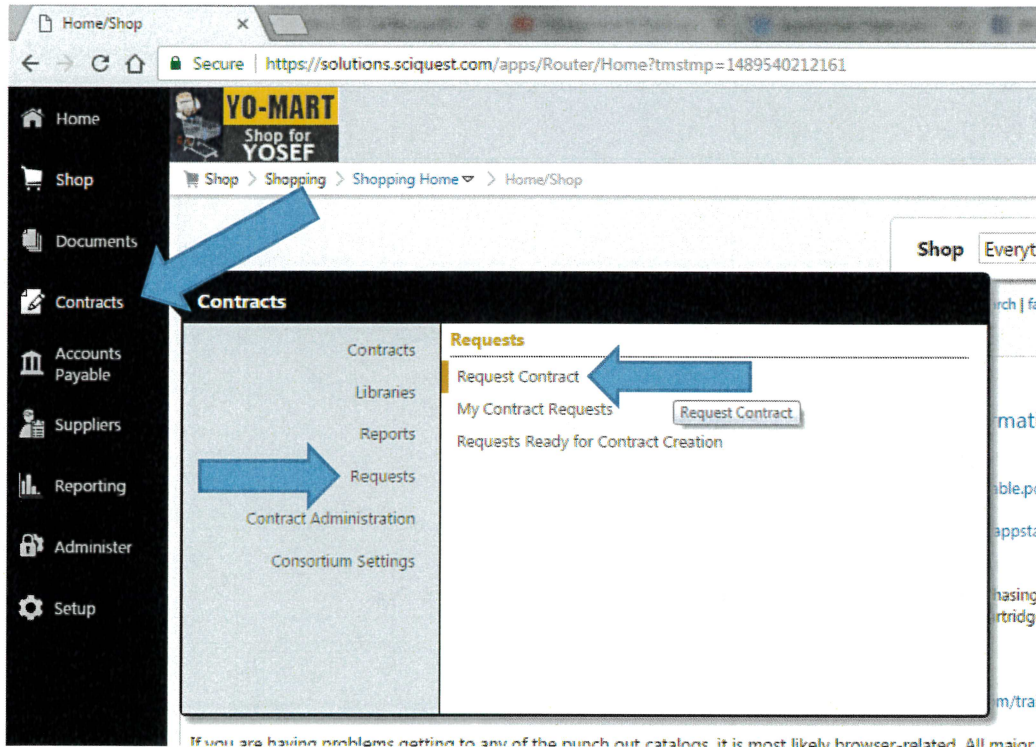
Submitting a Contract Request

1. Log into Yo-Mart:



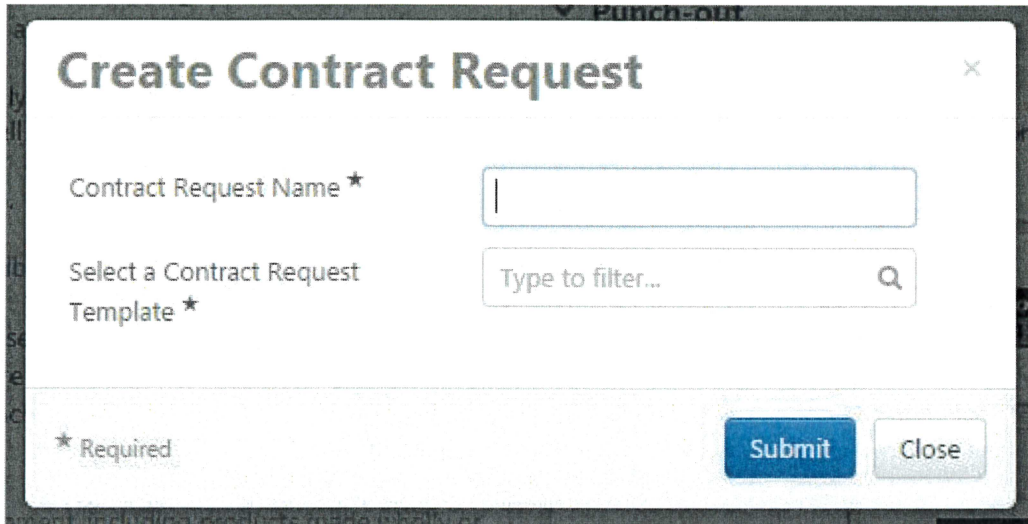
Navigate to systems.appstate.edu and click on the 'Yo-Mart' header link. Next, click the link at the top of the page to log into Yo-Mart. This link will send you to a log-in screen where you will sign in with your ASU username and password.

2. Navigate to the contract request wizard:



In the menu bar on the left, hover over the 'Contracts' logo, click 'Requests' and then click 'Request Contract'. Notice that this screenshot shows more options than you see, Yo-Mart tailors different permissions to different users depending on whomever is logged in.

3. Select a contract request template:



Create Contract Request [X]

Contract Request Name *

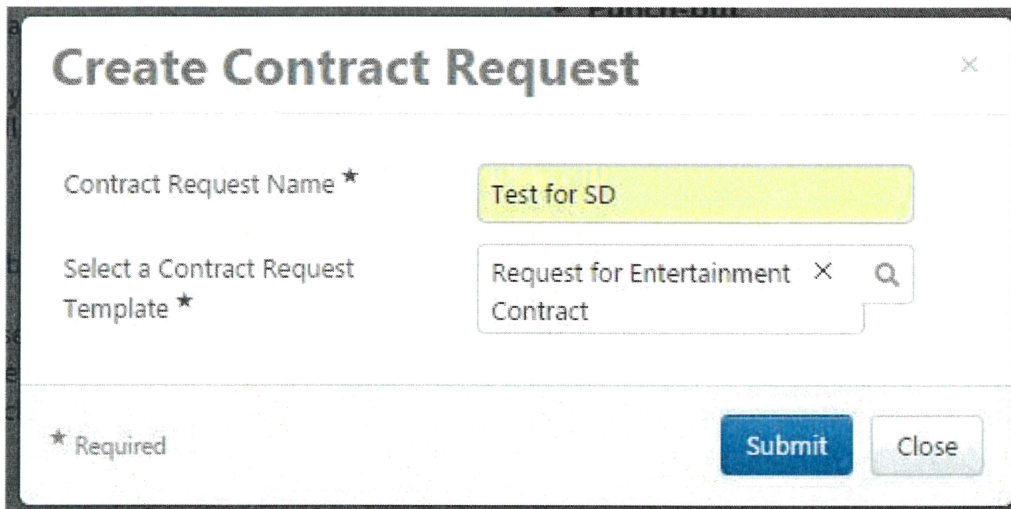
Select a Contract Request Template * [Q]

* Required

Submit **Close**

You should see this pop-up window. Give your contract request a name which should be something that makes sense to you because you can search on that name later when looking for the completed contract. Choose a contract request template, you can either click on the magnifying glass to see what is available or just start typing the template you know you want to use.

Once you have given your contract request a name that is relative to what you are doing and have selected a template, click the 'Submit' button.



Create Contract Request [X]

Contract Request Name *

Select a Contract Request Template * [X] [Q]

* Required

Submit **Close**

4. Complete the contract request wizard:

The screenshot shows the 'Instructions' screen of the 'Test for SD' contract request wizard. The breadcrumb trail is 'Contracts > Requests > My Contract Requests > Instructions'. The page title is 'Test for SD' with a sub-header 'Instructions'. The form number is 147849 and the request status is 'Incomplete'. A sidebar on the left lists the wizard steps: Instructions (active), Details, Attachments, Questions, Choose Vendor, Contract Information, Review and Complete, Discussion, and Contract Request Workflow. The main content area contains instructions: 'Please have all the contract information available before beginning your contract request. This should include:' followed by a bulleted list of requirements: an electronic copy of the contract, vendor information, contract dates, funding source, grant information, contract type, contract description, total cost, and other attachments. A 'Next >' button is located at the bottom right.

You should see a new screen similar to the screenshot above. This wizard will walk you through providing all the information needed for the contract request. Read all the instructions and press 'Next' through the screens.

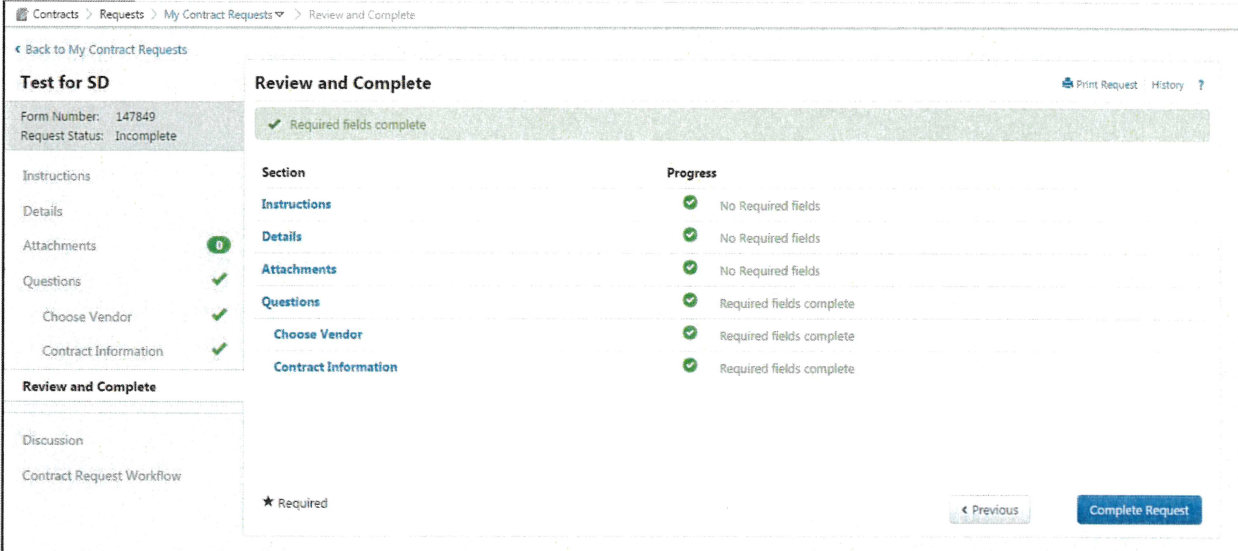
On the 'Attachments' screen, you may attach any documents you would like any approvers or the contract manager to see but do not feel obligated to attach anything if this contract request will eventually use a standard ASU contract template. If you are requesting a standard ASU template, TCM will generate that for the contract manager later in the process based on the information you provide. If you are requesting a 3rd party contract, attach that contract here.

Click 'Next' until you are on the 'Choose Vendor' screen, shown below. Here you must choose the vendor you are contracting with in the 'Second Party' field. If the vendor you are not contracting with is not in the system, you need to exit the contract request form and establish that vendor in the system with the Controllers Office. The form for this can be found back on the homepage of Yo-Mart, the form is titled, "New Supplier Form".

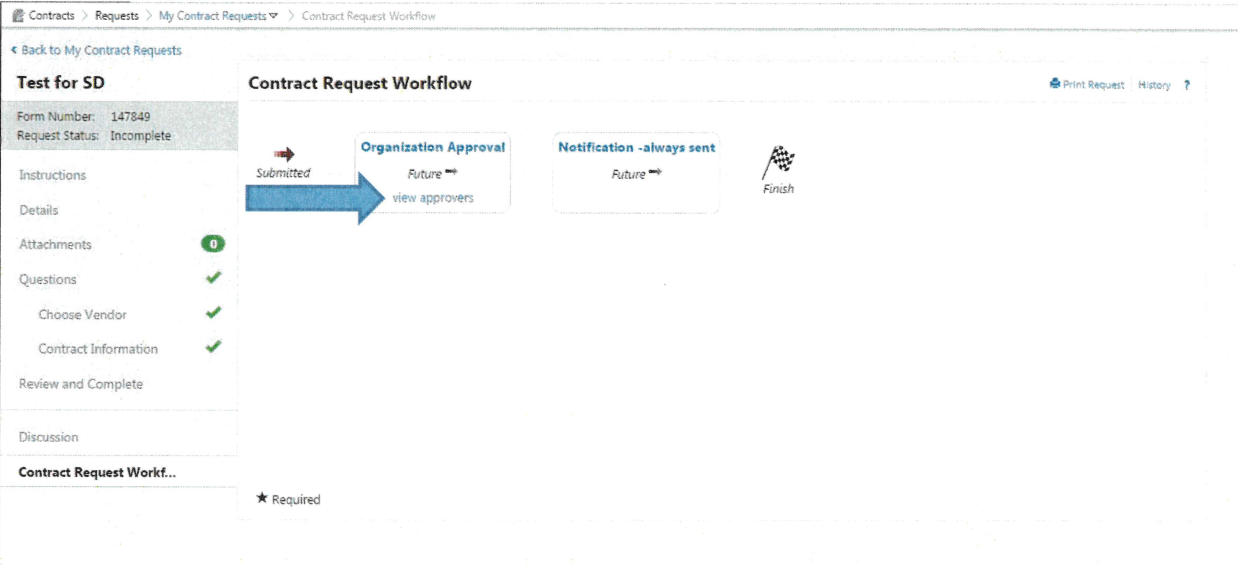
The screenshot shows the 'Choose Vendor' screen of the 'Test for SD' contract request wizard. The breadcrumb trail is 'Contracts > Requests > My Contract Requests > Questions - Choose Vendor'. The page title is 'Test for SD' with a sub-header 'Questions - Choose Vendor'. The form number is 147849 and the request status is 'Incomplete'. The sidebar on the left shows the wizard steps, with 'Choose Vendor' highlighted. The main content area contains instructions: 'Please choose the vendor with whom the contract will be executed from the 'Second Party' field. If you can not find your vendor in the Second Party field please exit the contract request form and complete the 'New Supplier Request' form on the YoMart homepage.' Below this is a 'Vendor Information' section with a 'Second Party' field (marked as required) and an 'Additional Second Parties' field, both with search filters. A legend indicates that a star symbol (*) denotes a required field. At the bottom, there are three buttons: 'Previous', 'Save Progress', and 'Next >'.

After you have chosen a vendor, or 'Second Party', click 'Next' to complete the remaining questions on the 'Contract Information' screen.

5. Review and submit your contract request:



After you have populated all required fields in the contract request form, the 'Review and Complete' screen will show all green check marks and you are ready to submit the request. Once you submit the request it will be routed through a workflow of approvers, ending with a contract manager who will work with the University Attorney's office to potentially red line and send for signature. If you would like to see exactly who will be approving this contract request, you can click on the 'Contract Request Workflow' tab which will show you this screen:



Approvals will vary depending on the detail of the contract request, but this page will show you how many approvals the request must go through, and who those approvers are.

Click on the 'View Approvers' link and Yo-Mart will show you where that request is going:

The screenshot displays the 'Contract Request Workflow' interface. On the left, a sidebar lists various sections: 'Test for SD' (Form Number: 147849, Request Status: Incomplete), 'Instructions', 'Details', 'Attachments' (0), 'Questions' (2 checked), 'Choose Vendor' (checked), 'Contract Information' (checked), 'Review and Complete', 'Discussion', and 'Contract Request Workf...'. The main area shows a workflow diagram with steps: 'Submitted Future', 'Organization Approval' (with a 'view approvers' link), 'Notification -always sent' (with a 'Future' arrow), and 'Finish'. A pop-up window titled 'Workflow Step Approvers (Organization Approval)' is open, showing 'Approver Group : Org Entertainment 100000' and 'Clinton Coffey coffeycg1@appstate.edu' with a 'Close' button. A '★ Required' icon is visible at the bottom of the workflow area.

If the approvers look good, go back to the 'Approve and Complete' tab and click 'Complete Request'.

6. You can check up on where the request is in the approval process anytime by going to Contracts -> Requests -> My Contract Requests.

Next Steps

Afer a contract request has been submitted, the next steps are approval, contract creation, electronic signature and then payment.

1. Every contract request will have a different approval structure based on several elements of the contract request. To view where the contract is in the approval process, go to the contract request by clicking Contracts -> Requests -> My Contract Requests -> [choose the contract request you are looking for] -> 'Contract Request Workflow' tab and you will see where a contract request is sitting in the workflow. To see who is supposed to be approving in that specific step you can click 'View Approvers' and then follow up with that person. To see more detail on the approvals of the contract request you can click on the 'History' link in the top right corner of the request.
2. When approvals for a contract request have been completed, the contract request moves to a queue called 'Requests Ready for Contract Creation' which can only be viewed by YoMart 'Contract Managers'. These Contract Managers make sure everything on the request looks complete and sends it for electronic signature using DocuSign. Contract Requestors aren't prompted that any of this is happening but can search for contracts that are out for signature by going to Contracts -> Search Contracts -> [I use advanced search here and mostly look by

vendor] -> click on the contract you are looking for -> navigate to the 'E-Signature' tab. There you will see who has or has not signed the contract. If there are questions about information found on the E-Signature tab, e-mail or call Business Systems.

3. When the contract gets signed electronically by both parties the contract requestor can receive an e-mail notifying them that this contract has been 'Fully Executed'. In order for a contract requestor to receive this e-mail, Business Systems must set up that rule. If you, as a contract requestor, would like to receive these 'Fully Executed' messages, call Business Systems to request this by Org code.
4. Lastly, once a contract requestor receives a contract's 'Fully Executed' e-mail and the work the contract outlines has been completed, payment can begin against the contract. See the instructional document titled 'Submitting Direct Pay Forms Electronically' on <https://systems.appstate.edu/yo-mart> for more information on how to submit an electronic direct pay against TCM contracts.

Questions or Issues

If you have any questions or issues with this new process contact Clint Coffey at 828.262.6114 / coffeycg1@appstate.edu or Vickie Young at 828.262.4027 / youngvc@appstate.edu.

If you have questions about vendor set up, contact Dawn Sturgill at 828-262-6425 / sturgllcs@appstate.edu.