

Total Contract Manager: How to Create a Contract

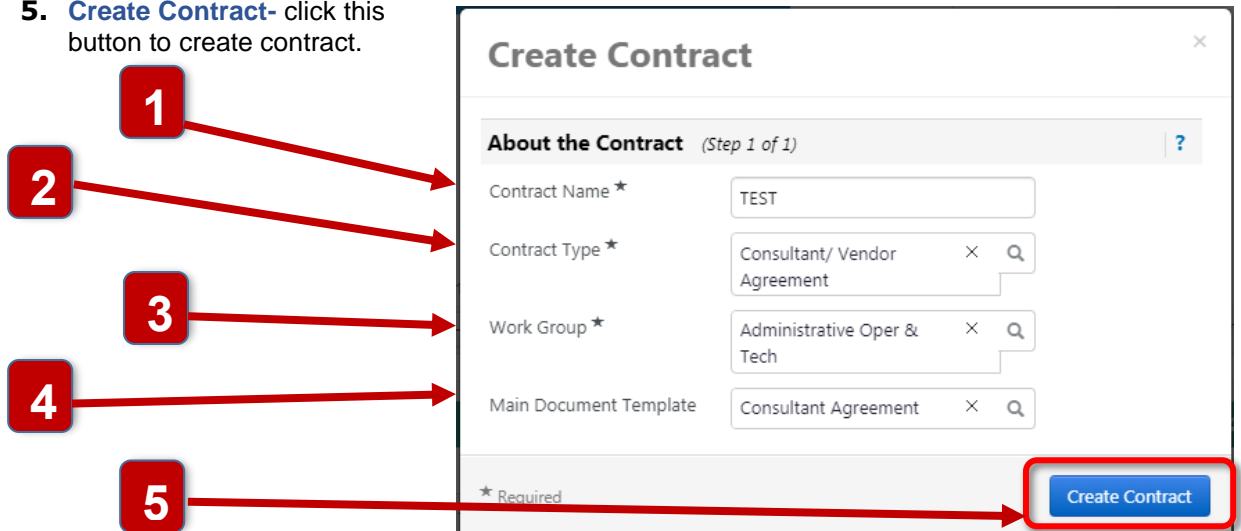
To create a new contract, you need the **Contract Manager** permission, and you must be assigned as a Manager or Administrator to the same work group as the contract you are creating.

Step 1: Navigate to Contracts → Contracts → Create New Contract



Step 2: Complete the following fields in the Contracts wizard:

1. **Contract Name**-Enter a descriptive **contract name**. The name can be up to 100 characters long.
2. **Contract Type** - Select a **contract type**. **Note:** The contract type can only be changed when the contract is in **Draft** status.
3. **Work Group** - Select a **work group**. Users who have been added as contract administrators, contract managers and stakeholders on the work group have access to the contract by default. This can be changed on the contract by marking it confidential.
4. **Main Document Template** -Choose the **main document template** you want to use as the basis of contract text.
5. **Create Contract**- click this button to create contract.



Step 3: Complete Contract Form:

Complete the required fields on the **Contract Header**. Once completed click **Next**. For a complete list of field definitions see the **TCM Glossary**.

Use the left hand menu to navigate through each section of the contract.

You must add the **Second Party** by clicking **Add Party**. A dialogue box will appear asking for contact information. Pace University will always be the **First Party**.

Note **Value** was formerly Contract Amount in Contract Director.

Click **Save Progress** if you would like to leave and come back to your draft. The **Next** button will automatically save any updates.

*****Not all sections beyond the Contract Header will apply. Please review the following information to review the function of each Contract section****

Alternative Clauses:

If your contract type has an alternative clause, there will be a question at the bottom of the header page. The answer to your question will drive whether or not you will have an alternative clause. Please see below example.

Template Questions

Is this contract for Maintenance, Repair, Installation, Pest Control, or the like? Yes No

★ Required < Previous Save Progress Next >

TCM000076
TEST Contract

Checked out To You
Type: Consultant/ Vendor Agreement
2nd Party:
Version: Renewal 0, Amendment 0

Total Contract Value (TCV)
TCV: 0.00 USD

> Lifetime Spend (USD)

Open Main Document

Summary

Header

Legacy Contract Formati...

Alternative Language 1

Alternative Language History ?

Close Main Document in Word before making changes.

Clause (Conditional Type)	Options	Clause Name	Description
▼ Consultant Agreement Proprietary Clause (Standard Clause with Options) Remove			
▼ Fallback options:			
	<input checked="" type="radio"/> Default Clause	Proprietary Rights - Full Text	
	<input type="radio"/> Fallback 1	Proprietary Rights - Text Option 2	

Attachments:

Dependent upon the Contract Type, the corresponding contract template will automatically be uploaded to the **Attachments** section. The user has access to download this attachment in Word using the Jaggaer Contract Authoring Word App to make updates (Please see **“Using the Word App”** tip sheet).

The user can also upload vendor paper or any additional documents that pertain to the contract here.

The crown icon notes this is the main document.

The main contract template appears here.

Version numbers are tracked here.

Attachment Actions:

Setting new attachment as Main Document:

If uploading a new attachment, the user can set this attachment as the **Main Document**.

Comparing Version History:

Attachments History ?

General (2) Obligations (0)

Main Document

Print Order	Attachment	Print with Full Contract	Version	Size	Date Uploaded	Actions
1	Main Document 2019-04-26 TCM000076 - Consultant Agreement (version 2).docx	✓	2	32 KB	4/26/2019 3:47:32 PM	Download Version History
2	work-order-template.docx	✓	1	24 KB	4/26/2019 3:39:19 PM	

When there is more than one version of the document, the user can compare version history by selecting **Actions** and clicking **Version History**.

Main Document Version History

Version History for Main Document

Version	Attachment File	Size	Date Uploaded	Changed By	Comments	Compare
2 (Latest)	Main Document 2019-04-26 TCM000076 - Consultant Agreement (version 2).docx	32 KB	4/26/2019	Test5 TCM	test	Select
1	Main Document 2019-04-26 TCM000076 - Consultant Agreement (version 1).docx	32 KB	4/26/2019	Test5 TCM	-	Select

Compare Section

Include Format Changes Yes No

Compare

The user must select the versions they would like to compare and then click on the **Compare** button.

2019-04-26 TCM000076 - Consultant Agreement (version 2).docx - Version: 2

CONSULTANT AGREEMENT This is a test

AGREEMENT made this [Start Date] by and between PACE UNIVERSITY, One Pace Plaza, New York, New York 10038 (hereinafter referred to as "Pace") and [Name (Primary Second Party)], with offices at [Street Line 1 (Primary Second Party)], [City/Town (Primary Second Party)], [State/Province (Primary Second Party)], [Postal Code (Primary Second Party)] (hereinafter referred to as "Consultant").

1. **Term** This Agreement shall commence on [Start Date] and shall terminate, unless earlier terminated as authorized by Section 5, below, on [End Date] (the "Term").

2. **Duties** Pace hereby retains Consultant to perform the following services (the "Work"), which Work shall not include lobbying activities or services within the meaning of state or federal law:

[DESCRIBE IN APPROPRIATE DETAIL THE SERVICES TO BE PROVIDED BY CONSULTANT, i.e., DESIGN A PROGRAM, EVALUATE A PROPOSAL, etc.];

3. **Expertise** Consultant represents and warrants that Consultant is available to perform the Work and that all individuals providing the Work have the necessary license, background, training and experience to perform properly delivered hereunder. Consultant further represents and warrants that Consultant lawfully controls all of the intellectual property that it may transfer or otherwise include in its deliverables under this Agreement.

4. **Fees and Expenses** Provided that Pace shall first have received from Consultant an original of this Agreement that shall have been countersigned by an authorized Consultant signatory, Consultant shall be paid, as its sole and exclusive consideration hereunder, a consultancy fee of [preferably flat fee; however, if flat fee not possible,

2019-04-26 TCM000076 - Consultant Agreement (version 1).docx - Version: 1

CONSULTANT AGREEMENT

AGREEMENT made this [Start Date] by and between PACE UNIVERSITY, One Pace Plaza, New York, New York 10038 (hereinafter referred to as "Pace"), and [Name (Primary Second Party)], with offices at [Street Line 1 (Primary Second Party)], [City/Town (Primary Second Party)], [State/Province (Primary Second Party)], [Postal Code (Primary Second Party)] (hereinafter referred to as "Consultant").

1. **Term** This Agreement shall commence on [Start Date] and shall terminate, unless earlier terminated as authorized by Section 5, below, on [End Date] (the "Term").

2. **Duties** Pace hereby retains Consultant to perform the following services (the "Work"), which Work shall not include lobbying activities or services within the meaning of state or federal law:

[DESCRIBE IN APPROPRIATE DETAIL THE SERVICES TO BE PROVIDED BY CONSULTANT, i.e., DESIGN A PROGRAM, EVALUATE A PROPOSAL, etc.];

warrants that Consultant has sufficient staff and resources to perform the Work and that all individuals providing the Work have the necessary license, background, training and experience to perform properly delivered hereunder. Consultant further represents and warrants that Consultant lawfully controls all of the intellectual property that it may transfer or otherwise include in its deliverables under this Agreement.

4. **Fees and Expenses** Provided that Pace shall first have received from Consultant an original of this Agreement that shall have been countersigned by an authorized Consultant signatory, Consultant shall be paid, as its sole and exclusive consideration hereunder, a consultancy fee of [preferably flat fee; however, if flat fee not possible,

Changes to the document will appear highlighted in yellow.

Obligations:

This section allows the user to setup reminders of certain duties that must take place during the contract lifecycle. Reminder emails will be sent to the user at the time and dates specified within this section.

The screenshot shows the 'Obligations' section for contract TCM000076. On the left is a sidebar with contract details: Type (Consultant/ Vendor Agreement), 2nd Party, Version (Renewal 0, Amendment 0), Total Contract Value (TCV) of 0.00 USD, and a link to Lifetime Spend (USD). Below these are summary items: Header (checked), Legacy Contract Information (checked), Alternative Language (1), Attachments (2), and Obligations (0), which is highlighted with a red box. The main content area is titled 'Obligations' and includes a 'Show Recurring Obligations As' dropdown set to 'Occurrences'. There are two date input fields for 'Due Date Between' with calendar icons and a 'More Options' link. Below the date fields are 'Clear' and 'Search' buttons. The status 'No results found' is displayed, and a 'C Occurrence in a Series' icon is visible in the bottom right.

Review Rounds:

This section allows the user to send the contract to internal stakeholders or external stakeholders for review. This action would be carried out prior to submitting the contract into the approval workflow.

The screenshot shows the 'Review Rounds' section for contract TCM000076. The sidebar on the left is identical to the previous screenshot, with 'Review Rounds' (0) highlighted in a red box. The main content area is titled 'Review Rounds' and displays the message 'This contract has 0 completed rounds of review.' Below this message are two buttons: 'Create Manual Internal Round' and 'Start External Round'. A 'History ?' link is located in the top right corner.

Communication Center:

This section allows the user to send internal and external communications via email through the TCM system. Attachments can be added to these communications and all messages sent are tracked within the Communication Center.

The screenshot shows the 'Communication Center' for contract TCM000076. On the left is a sidebar with contract details: Type: Consultant/ Vendor Agreement, 2nd Party: Renewal 0, Amendment 0, Total Contract Value (TCV): 0.00 USD, and a 'Lifetime Spend (USD)' link. The main area has tabs for 'Internal (0)' and 'External (0)', with an 'Add Internal Message' button. A light blue banner states 'There are no communications on this contract yet'. A 'History' link is in the top right.

Step 4: Define who can view this contract.

In the Applies To section the user must deselect the **Grant Access to this contract using Departments and Roles**. IF THIS IS NOT DESELECTED ALL USERS REGARDLESS OF WORKGROUP CAN SEARCH ACCESS A LIMITED VIEW OF THIS CONTRACT. The user can also specify access for specific workgroups outside of their area to view the contract. To do this they would move those specific workgroups to **Departments with access to this Contract** field.

The screenshot shows the 'Applies To' configuration screen. The 'Grant access to this contract using Departments and Roles' checkbox is checked and highlighted with a red box. Below are three sections: 'Available Departments' (listing various university departments), 'Available Roles' (listing various job roles), 'Departments with access to this Contract' (currently empty), and 'Roles with access to this Contract' (currently empty). A sidebar on the left shows contract details similar to the first screenshot.

Step 5: Submit the Contract for Approval

Once the contract is completed the user must click on the **Submit for Approval** button to submit the contract into the approval workflow.

TCM000076
TEST Contract

Checked out To: You
Type: Consultant/ Vendor Agreement
2nd Party: Microsoft Services
Dates: 5/1/2019 - 5/31/2019
Version: Renewal 0, Amendment 0

Total Contract Value (TCV)
TCV: 0.00 USD

Lifetime Spend (USD)
Open Main Document

Summary

Header	✓
Legacy Contract Informat...	✓
Alternative Language	1
Attachments	2
Obligations	0
Review Rounds	0

Submit for Approval

eProcurement Setup
Budget and Spend
Applies To
Goods and Services

Submit for Approval

Section	Progress
Header	✓ Required Fields Complete
Review Rounds	0 Required Fields Complete

View Approval Steps

< Previous **Submit for Approval**

Once submitted, the user can view where their contract is in the approval process by clicking on **Approvals**.

TCM000076
TEST Contract

Type: Consultant/ Vendor Agreement
2nd Party: Microsoft Services
Dates: 5/1/2019 - 5/31/2019
Version: Renewal 0, Amendment 0

Total Contract Value (TCV)
TCV: 0.00 USD

Lifetime Spend (USD)

Summary

Header	✓
Legacy Contract Informat...	✓
Alternative Language	1
Attachments	2
Obligations	0
Review Rounds	0

Approvals

No message exists. Edit

Submitted
4/26/2019 4:18 PM

Contract Admin Approval
Active
View approvers

Compile Robot
Future

Signature Robot
Future

Out for Signature
Future
View approvers

Finish