

# Total Contract Manager: How to Create a Contract

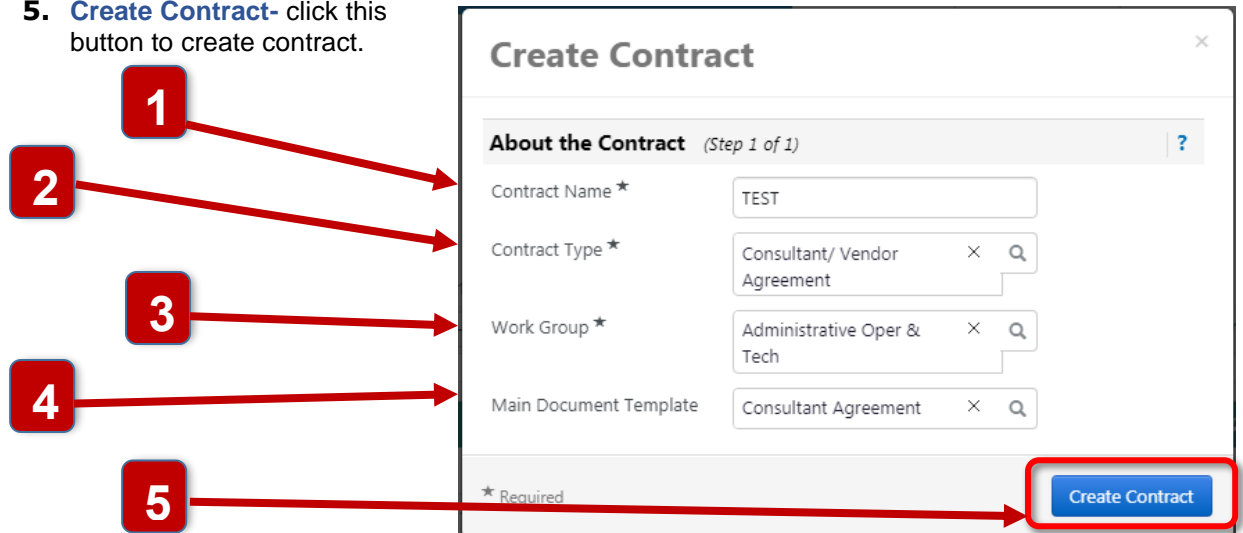
To create a new contract, you need the **Contract Manager** permission, and you must be assigned as a Manager or Administrator to the same work group as the contract you are creating.

## 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

Close Main Document in Word before making changes.

Clause (Conditional Type)	Options	Clause Name	Description
▼ Consultant Agreement Proprietary Clause (Standard Clause with Options)			
▼ 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.

**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 Informati...  
Alternative Language

**Attachments**

**Attachments**

General (1) Obligations (0)

Add Attachments

Main Document

Print Order	Attachment	Print with Full Contract	Version	Size	Date Uploaded	Actions
1	Main Document 2019-04-26 TCM000076 - Consultant Agreement (version 1).docx	✓	1	32 KB	4/26/2019 1:40:31 PM	Actions

The main contract template appears here.

Version numbers are tracked here.

## Attachment Actions:

Setting new attachment as Main Document:

**Attachments**

General (2) Obligations (0)

Add Attachments

Main Document

Print Order	Attachment	Print with Full Contract	Version	Size	Date Uploaded	Actions
1	Main Document 2019-04-26 TCM000076 - Consultant Agreement (version 1).docx	✓	1	32 KB	4/26/2019 1:40:31 PM	Actions
2	work-order-template.docx	✓	1	24 KB	4/26/2019 3:39:19 PM	Actions

Replace as 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	<a href="#">Main Document</a> 2019-04-26 TCM000076 - Consultant Agreement (version 2).docx	✓	2	32 KB	4/26/2019 3:47:32 PM	Download <b>Version History</b>
2	<a href="#">work-order-template.docx</a>	✓	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)	<a href="#">Main Document</a> 2019-04-26 TCM000076 - Consultant Agreement (version 2).docx	32 KB	4/26/2019	Test5 TCM	test	Select
1	<a href="#">Main Document</a> 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** Close

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

Two side-by-side document windows are shown. The left window is titled '2019-04-26 TCM000076 - Consultant Agreement (version 2).docx - Version: 2' and the right window is '2019-04-26 TCM000076 - Consultant Agreement (version 1).docx - Version: 1'. Both documents are titled 'CONSULTANT AGREEMENT'. In the left document, the text 'This is a test' is highlighted in yellow. A red box highlights this text, and a red arrow points from it to a text box below. The right document shows the same text without the highlight.

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 this is a summary list with 'Obligations' highlighted in a red box and showing a count of 0. The main content area is titled 'Obligations' and includes a filter for 'Show Recurring Obligations As' set to 'Occurrences'. There are two date input fields for 'Due Date Between' with calendar icons and a 'More Options' link. A 'Search' button is present, and the status 'No results found' is displayed. A 'Clear' button and a 'Search' button are also visible. A 'History' link is in the top right corner.

## 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' highlighted in a red box and showing a count of 0. 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 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. A red box highlights the checkbox 'Grant access to this contract using Departments and Roles', which is currently checked. Below this 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). The sidebar on the left shows contract details similar to the previous 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.

The screenshot shows the 'Submit for Approval' interface for contract TCM000076. On the left, a sidebar lists contract details: 'Checked out To: You', 'Type: Consultant/ Vendor Agreement', '2nd Party: Microsoft Services', 'Dates: 5/1/2019 - 5/31/2019', 'Version: Renewal 0, Amendment 0', and 'Total Contract Value (TCV): 0.00 USD'. Below this is a 'Summary' section with progress indicators for 'Header' (checked), 'Legacy Contract Informati...' (checked), 'Alternative Language' (1), 'Attachments' (2), 'Obligations' (0), and 'Review Rounds' (0). The main area is titled 'Submit for Approval' and contains a green message: 'All sections are complete. You may submit your contract for approval.' Below this is a progress table:

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

At the bottom right, there is a 'Submit for Approval' button highlighted with a red box, and a 'Previous' button to its left.

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

The screenshot shows the 'Approvals' page for contract TCM000076. The left sidebar is identical to the previous screenshot, but the 'Approvals' link is highlighted with a red box. The main area is titled 'Approvals' and shows a timeline of approval steps:

- Submitted**: 4/26/2019 4:18 PM
- Contract Admin Approval**: Active (with refresh icon), View approvers
- Compile Robot**: Future (with arrow icon)
- Signature Robot**: Future (with arrow icon)
- Out for Signature**: Future (with arrow icon), View approvers
- Finish**: Represented by a checkered flag icon.

A red box highlights the entire approval process timeline.