

Electronic Contract Routing

Spring 2018

TOPICS: ELECTRONIC CONTRACT ROUTING

- Part 1: Definitions of Contract and University Signatory Power
- Part 2: Types of Contracts and New Contract Request Ticket Submission
- Part 3: CUBuyplus Contract Routing Module
 - Viewing contracts
 - Approving contracts

Part I: Definitions of Contract and University Signatory Power

What is a contract?

A binding agreement between two or more persons or parties that is legally enforceable or a business arrangement for the supply of goods or services at a fixed price. Contracts have terms and conditions.

Who at CU has signatory power?

The Vice President for Finance (or a designated proxy) is the official signatory for Creighton University. Others who sign or agree to any document that binds the University are signing in an **individual** capacity and could be held liable.

Part 2: Types of Contracts/Submission Process

- **Goods and Services, Technology Contracts** initiate in Strategic Sourcing. Contract owners must utilize the electronic submission form located on the Strategic Sourcing website.
- **Affiliation/articulation Agreements** initiate in the Office of the General Counsel. Fill out the Contract Initiation Form and submit via email to the “initiator” Darlene Golden at dgolden@creighton.edu. Attach the agreement and any required documents.

SUBMITTING A NEW CONTRACT REQUEST TICKET

PLEASE NOTE:

EASYVISTA DOES NOT INTERFACE WITH CUBUYPLUS.

A STRATEGIC SOURCING STAFF MEMBER ENTERS THE CONTRACT INFORMATION INTO THE MODULE AND INITIATES THE ROUTING PROCESS.

New contract requests are submitted at the Strategic Sourcing webpage by clicking **“ENTER A TICKET”**.

STRATEGIC SOURCING (FORMERLY PURCHASING)



Strategic Sourcing strives to provide effective, reliable and efficient support to the procurement needs of the University's academic, administrative, and health care areas while seeking to maintain and advance long-term, cost effective and ethical supplier relationships.



Next, single sign-on.

A single sign-on form for Creighton University. It features the university logo at the top left, followed by the text "Sign in with your organizational account". Below this are two input fields: one for an email address (containing "someone@example.com") and one for a password. At the bottom left of the form is a blue "Sign in" button. A large red arrow points from the left towards the form.

Click on **“I NEED SOMETHING”**.

Creighton UNIVERSITY

My Approvals 0 Open Tickets 5 Closed Tickets 20 My Equipment 1

SOMETHING is BROKEN (X icon)
Problems with your PC, printer, password, internet, or network access? We can help.

I NEED SOMETHING (+ icon)
Get software, request network access, order a laptop, phone or other device, and much more.

I HAVE AN IDEA (?)
We love ideas! Tell us about yours.

Click on **“STRATEGIC SOURCING”**
on the left hand side.

Choose a Category and Search

Looking for a service? Search here!


- Access & Permissions
- Computer Refresh
- Desktop Computer
- EA
- Email
- Internet & Network
- Laptop & Tablets
- Medical Exams
- Recycling
- Software
- Strategic Sourcing**
- Telephone






Create a Sharepoint Team Site

Get access to shared folders


Click on **“REQUEST NEW CONTRACT”**
then **“Submit a Ticket”**.

Choose a Category and Search

Looking for a service? Search here! 


Access & Permissions	 Amazon Request	 Cell Phone Request	 New Supplier Request	 Quote / Pricing Request	 Renegotiation Request
Computer Refresh					
Desktop Computer					
EA					
Email					
Internet & Network					
Laptop & Tablets					
Medical Exams					
Recycling					
Software					
Strategic Sourcing					
Telephone					

Renewal of Contract

 **Request New Contract**

Request New Purchase

Vendor Dispute



Fill in all required fields, upload documents and click “OK”.

Strategic Sourcing New Contract Form

Timeline for Contracts

- Contracts need to be submitted in a timely manner. Please note that the contract module cannot accommodate RUSH requests.
- Contract negotiation, legal review and signature phase takes an average of 3 weeks.
- Timelines can vary based upon current demand for service and contract complexity.

Special Instructions:

- For 3rd party contracts, governing law language must specify the State of Nebraska.
- No auto-renewals.

Contracts of a confidential nature initiate in the Office of General Counsel. Contact Lannette Chavez at LannetteChavez@creighton.edu or x5589 for instructions.

Is this an affiliation/articulation agreement?

Is this a revenue agreement?

Do you already have the contract document? *

Is this a new agreement or a renewal?

Supplier Information: Any supplier not registered in CUBuyplus will need to register before receiving payment.

Official business name: *


Product / Service Description:

Troublesome Fields in the New Contract Ticket


If you do not know your...

- BSC Specialist: Ask Jeff Klein, Director, Business Service Center
- Financial Liaison: Ask Laura Mann, Office of the VP Finance
- Department level approvers: Ask your dean or vice president/provost

Once submitted, a Recipient Request Confirmation email will be received. The emails contains the information entered into the new contract request ticket.

 servicedesk@creighton.edu | Mann, Laura L; Mann, Laura L

Confirmation of your request SR036417

 You forwarded this message on 2/22/2018 3:02 PM.

Recipient Request Confirmation

Your request has been received.

Reference #: [SR036417](#)

Create Date: [2/22/2018 2:57:31 pm \(UTC - 6\)](#)

Recipient: [Mann, Laura L](#)

Requester: [Mann, Laura L](#)

Item Requested: [Request New Contract](#)

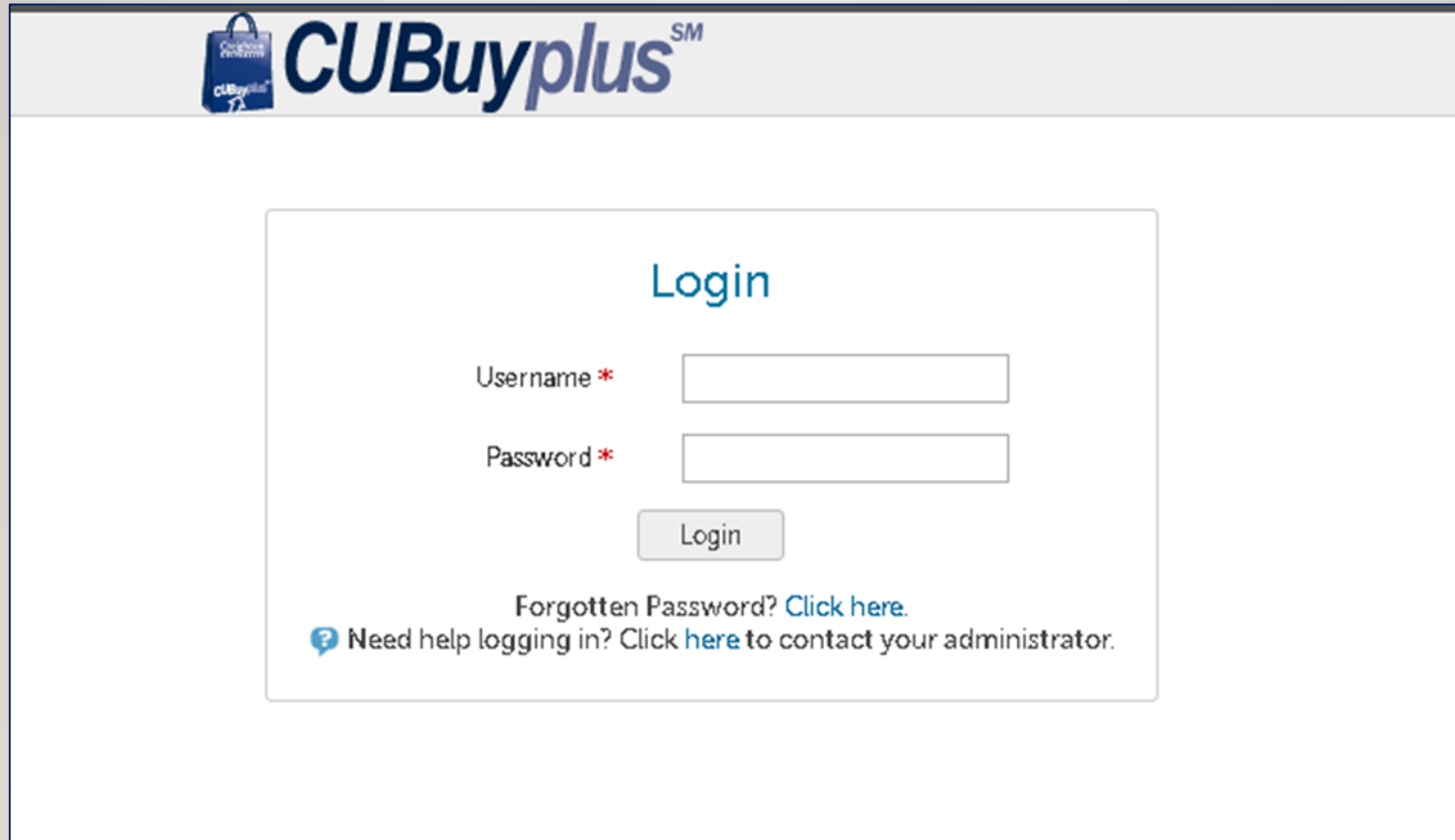
Additional Info:

PART 3:

CUBUYPLUS CONTRACT ROUTING MODULE

VIEWING CONTRACTS
APPROVING CONTRACTS

The contract module has the **same single sign on as CUBuyplus.**



The image shows a screenshot of the CUBuyplus login interface. At the top left, there is a logo consisting of a blue shopping bag with the text 'CUBuyplus' and 'SM' next to it. Below the logo, the word 'Login' is centered in a blue font. Underneath, there are two input fields: 'Username *' and 'Password *', both with red asterisks indicating required fields. A 'Login' button is positioned below the password field. At the bottom of the login box, there are two lines of text: 'Forgotten Password? [Click here.](#)' and '? Need help logging in? [Click here](#) to contact your administrator.'

IMPORTANT!!

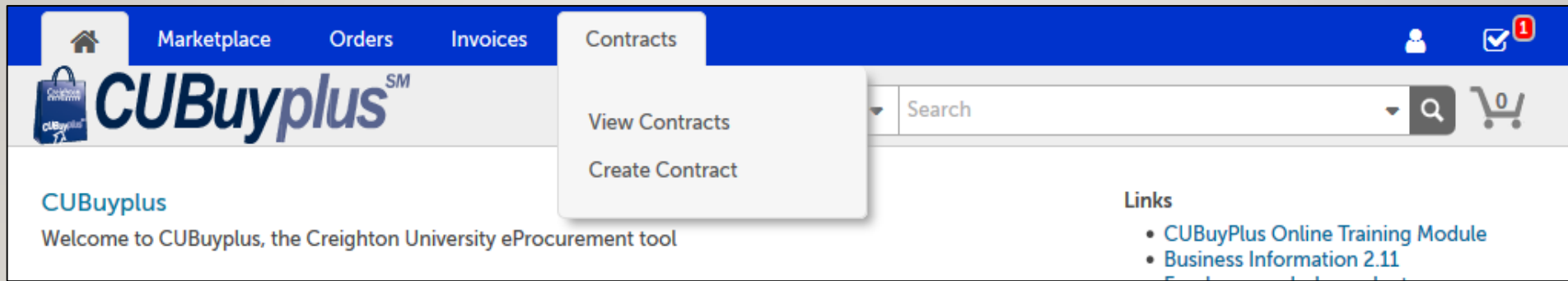
Access to CUBuyplus does not automatically give access to view contracts.

New CUBuyplus contract module users will need to complete the [Approver Training Brainshark](#).

Upon completion, access to CUBuyplus will be granted and the “contracts” tab will appear on the homepage. If the tab is not present, log in and re-enter CUBuyplus.

Viewing Contracts

All contracts can be viewed and searched under Contracts > View Contracts.



The screenshot displays the CUBuyplus web application interface. The top navigation bar is blue and contains the following elements from left to right: a home icon, the text 'Marketplace', 'Orders', 'Invoices', and 'Contracts' (which is highlighted). To the right of the navigation bar are a user profile icon and a checkmark icon with a red notification bubble containing the number '1'. Below the navigation bar is a search bar with the placeholder text 'Search' and a magnifying glass icon. To the left of the search bar is the CUBuyplus logo, which includes a shopping bag icon and the text 'CUBuyplus SM'. Below the search bar is a 'Links' section with two bullet points: 'CUBuyPlus Online Training Module' and 'Business Information 2.11'. A dropdown menu is open under the 'Contracts' tab, showing two options: 'View Contracts' and 'Create Contract'.

Marketplace Orders Invoices **Contracts**

CUBuyplus SM

Search

View Contracts

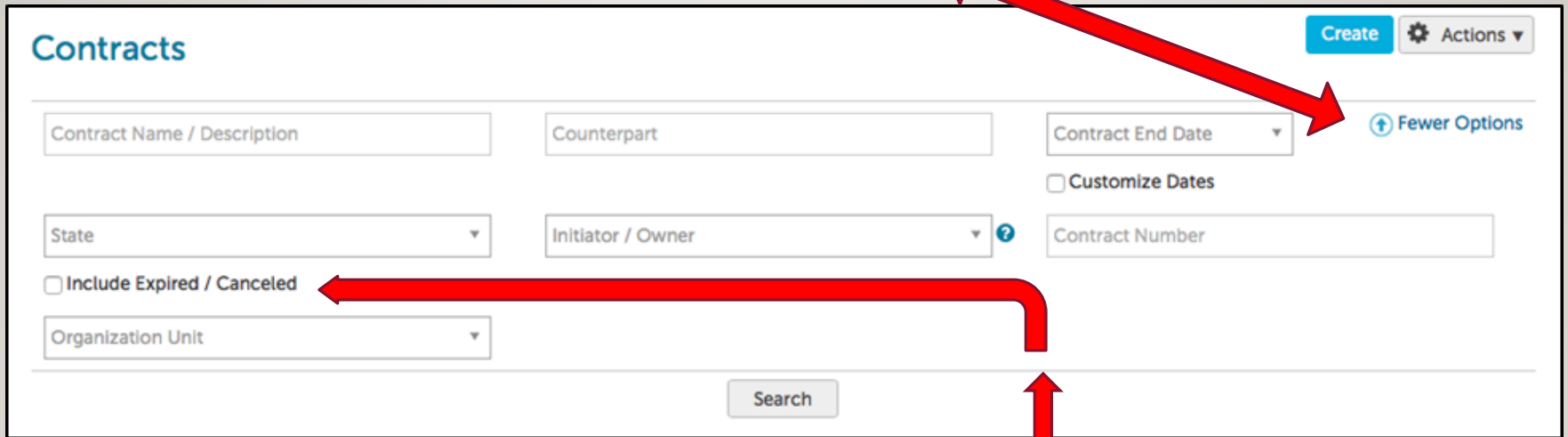
Create Contract

Links

- CUBuyPlus Online Training Module
- Business Information 2.11

Searching for Contracts

When a user navigates to View Contracts, there are filters that can be used to help search for contract(s). To view search options, toggle between 



The screenshot shows a search interface for contracts. At the top right, there is a 'Create' button and an 'Actions' dropdown menu. Below this, there are several search filters: 'Contract Name / Description', 'Counterpart', 'Contract End Date' (with a dropdown arrow), 'State' (with a dropdown arrow), 'Initiator / Owner' (with a dropdown arrow and a help icon), 'Contract Number', and 'Organization Unit' (with a dropdown arrow). There is also a 'Customize Dates' checkbox. At the bottom, there is a 'Search' button. A 'More Options' button is located at the top right of the filter area, and a 'Fewer Options' button is located at the bottom right of the filter area. A red arrow points from the 'More Options' button to the 'Fewer Options' button. Another red arrow points from the 'Fewer Options' button to the 'Include Expired / Canceled' checkbox. A third red arrow points from the 'Include Expired / Canceled' checkbox to the 'Search' button.

To view **all** contracts check the “ Include Expired/Canceled” box.

Reviewing Contracts in the Module

Tabs: Leadsheet, Counterpart, Documents, Members, Comments and Workflow.

264 - 2018-ADD-IT-REEHER-SMM FEATURE
Creighton University > Reeher LLC

Leadsheet Counterpart Documents Members Comments (2) Workflow Transactions

Name 2018-ADD-IT-REEHER-SMM FEATURE Created Date 2/8/2018 2:46 PM

Contract Number 264 Start Date 2/8/2018 12:00 AM


Initiator Margaret Persing End Date 3/30/2019 11:59 PM


Owner Kelly Ptacek State Sent for Countersignature

Purchasing Organization Units Expiry Warning Date 11/30/2018 12:00 PM

Value Funds Remaining

Alert Value Funds Allocated \$0.00

Linked Contracts Copy of: 257 Contract Documents
Is Related To: 257  Delete

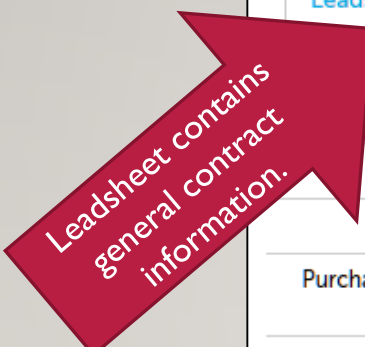
Organization Unit Category Access software 

Contract Type Goods and Services Technology - Academic

Description Social Media Matching feature using Clearbit Data.
SR035055

Document Requirements

Background Check Requirement N/A



264 - 2018-ADD-IT-REEHER-SMM FEATURE

Creighton University > Reeher LLC

Leadsheet

Counterpart

Documents

Members

Comments (2)

Workflow

Supplier Reeher LLC

Currency USD

Contacts

Rod O'Connor
rod.oconnor@reeher.com
651-789-1705
165 Western Ave N
Suite 8
St Paul, MN 55102
United States

Counterpart contains information on the supplier, vendor or individual.

264 - 2018-ADD-IT-REEHER-SM

Creighton University > Reeher LLC

Leadsheet

Counterpart

Documents

Members

Comments (2)

Workflow

Transactions

Show Deleted Documents

Document Type	File
Addendum	 Contract_Initiation_Form - Reeher (1).docx 
Addendum	 Reeher_Addendum_(3).pdf  

The document tab stores signed agreements and any supporting documents.

264 - 2018-ADD-IT-REEHER-SMM FEATURE

Creighton University > Reeher LLC

Leadsheet Counterpart Documents **Members** Comments (2) Workflow Transactions

Name	Permission
Kelly Ptacek	Owner - Edit
Bryan Holdcroft	Review, Edit
Crystal Petersen	Review, Edit
Deborah Hal...	Review
Elizabeth	Review
...	Review, Edit
...	Review
... Nisbet	Review
Kathleen Booton	Review
Lannette Chavez	Review
Laura Mann	Review, View
Margaret Persing	Review, Edit
Matthew Gerard	Review

Members are users who are involved with the contract.

- Members will receive alert email notifications and have the ability to view contract documents. Members only have permission to view their contracts.
- Not all members are in the workflow.

264 - 2018-ADD-IT-REEHER-SMM FEATURE

Creighton University > Reeher LLC

Leadsheet

Counterpart

Documents

Members

Comments (2)

Workflow

Trail

+ Add Comment »

Crystal Petersen (Creighton University) commented on 11/15/2018 11:00 AM

Attn: Jim Jansen

Could I get your response on this?

Contract made it through without proposed red line approval from supplier. I have routed out the SMM

Hello Crystal,

Sorry for the delayed response. Reeher currently doesn't accept changes to the social media matching service terms as is.

I'd be happy to speak with you voice to voice and explain why if that is useful. Please feel free to call me at 651-3

Thanks,
Rod

The comments tab keeps a record of comments between members.

- All comments are saved and time-stamped.
- Comments should be brief and professional as they are part of the audit trail.

264 - 2018-ADD-IT-REEHER-SMM FEATURE

Actions

Creighton University > Reeher LLC

Leadsheet Counterpart Documents Comments (2) Workflow Transactions

Goods and Services Technology - Academic Purchasing Review (Complete - Send to Academic)

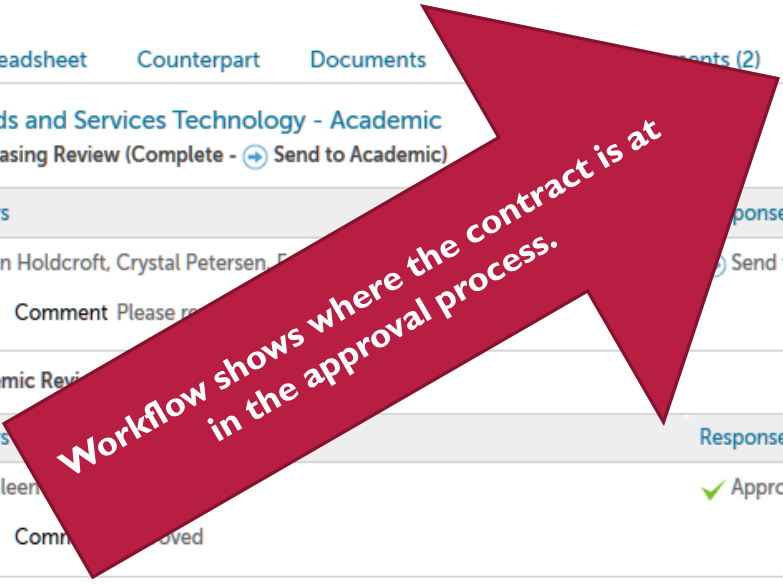
Users	Response	Created	Completed	Completed By
Bryan Holdcroft, Crystal Petersen	Send to Academic	2/8/2018 2:46 PM	2/8/2018 2:51 PM	Crystal Petersen

Academic Review

Users	Response	Created	Completed	Completed By
Kathleen	✓ Approve	2/8/2018 2:51 PM	2/8/2018 3:29 PM	Kathleen Booton
Matthew Gerard	✓ Approve	2/8/2018 2:51 PM	2/9/2018 1:34 PM	Matthew Gerard
Nicole Payne	✓ Approve	2/8/2018 2:51 PM	2/9/2018 9:22 AM	Nicole Payne

IT Review (Complete - ✓ Approve)

Users	Response	Created	Completed	Completed By
Deborah Halstrom, Tim Brooks	✓ Approve	2/9/2018 1:34 PM	2/11/2018 3:36 PM	Tim Brooks




The workflow tab also shows the approver and date/time stamp of approvals.


APPROVING CONTRACTS

E eek37584@creighton.edu | Mann, Laura L
Contract 295 - 2018-MSA-BUS-NEBRASKA 4-H CAMPS & CENTERS-YOUTH LEADERSHIP for Eastern Nebraska 4H Center task needs completing for VP Finance Review

Action Items


UNIVERSITY

There is a VP Finance Review task for Contract 295 - 2018-MSA-BUS-NEBRASKA 4-H CAMPS & CENTERS-YOUTH LEADERSHIP for Eastern Nebraska 4H Center for you to complete.
[Please login to approve or decline this task.](#)

unimarket 

Approvers will receive an **Alert** email to review a contract in the cue.

A link in the email will take the approver to the login page of CUBuyplus.

Marketplace Orders Invoices Contracts

CUBuyplusSM

All Search

Contracts

Contract Name / Description Counterpart Contract End Date More Options

Search

Contract	Counterpart	State	Organization Unit	Start Date	End Date
48 - 2017-MSA-EMGT-INTERNATIONAL RECRUITMENT	McGowan Education Group	Academic Review		2/1/2017 12:00 AM	1/31/2018 11:59 PM
52 - 2017-MSA-EMGT-INTERNATIONAL RECRUITMENT	McGowan Education Group	Academic Review		2/1/2017 12:00 AM	1/31/2018 11:59 PM

Click on the “Task” drop down box. A red number appears next to “Contracts” indicating the number of tasks.

Click “Contracts” to proceed, then click on the contract associated with the task.

Tasks

- Incomplete Requisitions
- Outstanding Receiving
- Quotes
- Invoices
- Contracts ²
- Background Jobs
- Approvals
- Activity

The screenshot displays a contract management interface for Creighton University. The contract title is "220 - 2018-MSA-UR-FAIRFIELD INN MARRI...". Below the title, there are tabs for "Leadsheet", "Counterpart", "Documents", "Members", "Comments (1)", "Workflow", and "Transactions". The contract details are as follows:

Name	2018-MSA-UR-FAIRFIELD INN MARRIOTT OMAHA DOWNTOWN-HOMECOMING WEEKEND RATES	Created Date	1/26/2018 10:43 AM
Contract Number	220	Start Date	1/26/2018 12:00 AM
Initiator	Bryan Holdcroft	End Date	9/16/2018 11:59 PM
Owner	Bryan Holdcroft	State	VP Finance Review

An "Actions" dropdown menu is open, showing the following options: Amend, Copy, Cancel, Link, WORKFLOW, Return with Revisions, and Approve. A red arrow points to the "Actions" button, and another red arrow points to the "WORKFLOW" option in the dropdown menu.

The “Actions” drop down box reveals the choice of task actions.

Approver chooses one of the following WORKFLOW actions

- Return with Revisions;
- Approve; or
- If available, send to Peer Review

The “cancel” button will cancel the entire contract and not the action. This command should only be utilized by the initiator.

To approve, a comment must be entered in the Comment box.

The screenshot displays the CUBuyplus web interface. At the top, there is a navigation bar with tabs for Marketplace, Orders, Invoices, and Contracts. The main header includes the CUBuyplus logo, a search bar, and a shopping cart icon with a '2' notification. The current page is titled '52 - 2017-MSA-EMGT-INTERNATIONAL RECR...' and is associated with Creighton University. Below the title, there are tabs for Leadsheet, Counterpart, Documents, Members, Comments, Workflow, and Transactions. The 'Workflow' tab is active, showing a 'Goods and Services - Academic' section with a 'Purchasing Review (Complete - Send to Academic)' status. A table lists users and their responses, with columns for Users, Response, Created, and Completed. A modal dialog titled 'Approve' is open, featuring a text input field and 'OK' and 'Cancel' buttons. A red arrow points to the message 'Please enter a comment for Approve.' within the dialog.

Marketplace Orders Invoices Contracts

CUBuyplusSM

All Search

52 - 2017-MSA-EMGT-INTERNATIONAL RECR...
Creighton University

Leadsheet Counterpart Documents Members Comments Workflow Transactions

Goods and Services - Academic
Purchasing Review (Complete - Send to Academic)

Users	Response	Created	Completed
Ed DuPree, Eric Gilmore, Jorge Ramirez, Sheri Bacon	Send to Academic	3/8/2017 1:07 PM	3/8/2017 1:08 PM

Comment mary chase

Academic Review (Awaiting task responses)

Users	Completed By
Mary Chase	

Approve

Please enter a comment for Approve.

Comment *

OK Cancel

Once all approvals have been completed:

- VP Finance signature and countersignature will be obtained via DocuSign
- Email notifications will be sent to members of the contract
- The contract will become “Active”

Contracts

Create Actions

52 Counterpart Contract End Date More Options

Search

Contract	Counterpart	State	Organization Unit	Start Date	End Date
52 - 2017-MSA-EMGT-INTERNATIONAL RECRUITMENT	McGowan Education Group	Active	←	2/1/2017 12:00 AM	1/31/2018 11:59 PM

Engagement with the Counterpart may not commence until the contract is “Active.”

Questions? Please ask!

- Strategic Sourcing
 - Eric Gilmore, Senior Director
 - Sheri Bacon, Senior Buyer
 - Bryan Holdcroft, Buyer
 - Crystal Petersen, Buyer
 - Maggie Persing, Sourcing Coordinator
- Lannette Chavez, Office of the General Counsel
- Laura Mann, Office of the Vice President for Finance