# General Guide to Creating Contracts in Marketplace

1. Prior to starting the contract: gather required information from Contract Supervisor
   1. Talk to vendor about the electronic contracting process.
   2. Is eSignature going to be OK?
   3. Who signs on behalf of the vendor? Are they the same person who is the authorized representative for the contract? Get the names, titles, phone and email addresses.
   4. Are they set up as a vendor in SWIFT?
   5. Advise them that they will need both a fully executed contract as well as a PO before services may begin.
   6. Advise them that once the DRAFT contract is created, the contract approval process will be done through an email from SciQuest; however the signature email will come from DocuSign once the DRAFT is finalized.
2. Click “Create New Contract”
3. Enter Contract Name – Be specific and so you can differentiate from other related contracts.
4. Select Contract Type by clicking the magnifying glass on the right side of the box.
5. Click caret next to Minnesota State Colleges….(DO NOT CLICK THE RADIO BUTTON next to Minnesota State Colleges…)
6. Select Contract type (If IT agreement, click caret for dropdown)
7. Select Institution by clicking the magnifying class on the right side of the box (DO NOT CLICK THE RADIO BUTTON next to Minnesota State).
8. Select your Institution
9. Select Main Document Template by clicking the magnifying class on the right side of the box. If there is a template available, please select the correct one otherwise you will be able to upload within the contracts module. (See 11 below)
10. Click the blue create a contract button.
11. In the contract wizard (left horizontal side of the contract module) you can upload a main document. (See Upload Main Document option). Use the caret to the right side of the box. Alternatively, and if you forgot to load a template, you can do so at this time.
12. Choose yes for E-Signature.
13. Enter Contract Description.
14. Complete Contract First Party by selecting edit, and select 1) contact name (authorized representative) and 2) campus address.
15. Add Contract Second Party which is the vendor. Add Contact Name and Address
16. Select Contract Start Date. Use the date of entry of the contract.
17. Select Contract End Date. Enter a date at least 2 weeks past service end date in case there are delays.
18. (Optional) Add Review Term info if you wish to receive notification to review the contract prior to the contract end date.
19. (Optional) Add Renewals remaining and renewal term.
20. (Optional) Add Searchable Keywords to aid in locating the contract is search page.
21. If contract will not be e-signed – you MUST add location of where original, “wet” signature contract will be stored in “Hard Copy Location”. If unsure, please check with your business office.
22. (Optional) Select other Institutions Involved in this contract, but select your own institution.
23. Will this contract have an encumbrance? Select either “yes” or “no”.
24. Each contract type will have specific questions driving workflow. You will need to work down the contract wizard answering specific questions. A \* represents a mandatory response.
25. Does this contract need Office of General Counsel (OGC) review? Select either “yes” or “no”
    1. If yes – select who in particular you want to review from the OGC’s office. If you do not know or want to assign specifically, answer “Unassigned” and the OGC’s office will assign.
26. Edit contract in Word with Jaggaer Word App.
    1. If this is an uploaded contract, there are not placeholders and you will need to manually place the contract number and purchase order number on the contract.
    2. Always check vendor name and if there is a placeholder, you can remove the placeholder by right clicking in the box and selecting “remove content control”.
    3. Check rest of document to make sure formatting, line spacing, section numbering and delete red text, etc. (See Checking Steps below) or insert Checking Steps here.
27. When WORD editing in Jaggaer Word App is complete, click on “Check in”.
28. The contract must be ready for signature prior to submitting for approvals, all internal/external review rounds must be completed with IT/Tax/OCG/Attorney General/Vendor/Stakeholders prior to submitting for approval.
29. At eSignature add Signers in order they will sign contract
30. At Approval, submit into Approval Workflow.
    1. Note: Only submit into workflow after all Internal and External Review Rounds have been completed, and the contract is fully negotiated and edited and ready for signature. (Avoid the situation where any approver is viewing the contract for the first time in the Workflow Approval step).
31. **Stop**
32. Create requisition entering the contract number in the first line of the requisition.
33. Return to the contract upon receipt of the PO and add complete PO number to Contract Description area of the Header page and in the PO line of the Duties/Payment Details page.
34. Submit contract to workflow for approvals only after internal and external review rounds have been completed. To expedite the contract process, use review rounds for as the workflow approval is only approve or return to draft.
35. Once contract has been fully approved you return to the contract, go to Contract Options dropdown and chose launch eSignature.
36. Add all signature, name, title and date placeholders into appropriate signature boxes. Signing order is:
    1. Vendor.
    2. Purchasing for encumbrance.
    3. College Authorized Representative/Signer.
    4. As to form and execution.
37. Click on “Send”.
38. Vendor will receive the first email from DocuSign which will take up to two hours. Be sure to alert them that they may need to check their junk or spam folder. Once vendor has signed, the next in line will receive the email until all have signed. All signers and contract administrator will get an email with a link to the fully executed contract upon final signature.
39. At this point, forward the PO to the vendor and services may commence on the start date.

Optional contract features/steps:

1. Enter Budget & Spend info
2. Set-up Notifications
3. Add additional users and contacts
4. Add copy of PDF PO to attachments (Optional, but recommended)
5. Once completely signed – Tie contract to PO in eProcurement (Purchasing)
6. Ensure that a fully signed and executed contract is stored in contract within TCM

Checking Steps:

1. Is this the correct contract type and template for what they are contracting?
2. Does the 10-digit Vendor Number associated with the Contract match the Vendor Number of the PO? (don’t worry about the –xxx location code).
3. Does the amount of the PO and the Compensation Breakdown/Reimbursements (if applicable)/Total Obligation match up?
4. Does the contract have the amounts in the correct format, and do they show a rate x time/quantity = total compensation?
5. Are they reimbursing expenses? Check the formatting for this amount. If no expense are to be reimbursed the correct format is: Zero and 00/100 Dollars ($0.00)
6. Does the Compensation + Reimbursement = Total Obligation?
7. If the contract is either a Services/PT or Maintenance Master Service Agreement – is the vendor an S-Corp or C-Corp (see instructions for how to determine if the vendor is an S-Corp or C-Corp, attached) and did they choose the correct answer to the first question on the Worker Classification Questions page?
8. Do they have the correct number of signers and are they in the correct order for the contract type (this varies by what contract type and template used. Best way to ensure the right order is to look at the Signature Block of the Word document)
9. I check the contract document in Word to make sure it’s numbered correctly (including sub-paragraphs), is in the correct font (Calibiri 12-point), some paragraphs seem to revert to Times New Roman and no matter what I do, they don’t stay fixed. Are there large gaps in the spacing that should be cleaned up. If the contract is set-up for eSignature – did the Contract Manager fill in the names of the signers? This can cause a problem if a change has to be made later. It requires the contract be Returned to Draft and corrected vs. simply changing/swapping out a signer in DocuSign.
10. Is the contract set to go through the correct Review Rounds before you Submit for Approvals?
    1. If the Contract Manager removed the insurance clause (for example) did they activate the Risk Management approval/review step?
    2. Is there a change to the contract language that requires OGC review? IF yes, is it activated?
11. If it looks good, approve it. If it needs work fix it or return to the contract manager for them to fix.