Electronic Contract Routing
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 1: 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”.

Next, single sign-on.
Click on “I NEED SOMETHING”.
Click on “STRATEGIC SOURCING” on the left hand side.
Click on “REQUEST NEW CONTRACT” then “Submit a Ticket”.
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 contact 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.

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.**
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.
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

To view all contracts check the “Include Expired/Canceled” box.
## Reviewing Contracts in the Module

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

<table>
<thead>
<tr>
<th>Leadsheet</th>
<th>Counterpart</th>
<th>Documents</th>
<th>Members</th>
<th>Comments (2)</th>
<th>Workflow</th>
<th>Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>2018-ADD-IT-REEHER-SMM FEATURE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Created Date</strong></td>
<td>2/8/2018 2:46 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Contract Number</strong></td>
<td>264</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Start Date</strong></td>
<td>2/8/2018 12:00 AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Initiator</strong></td>
<td>Margaret Persing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>3/30/2019 11:59 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Owner</strong></td>
<td>Kelly Ptacek</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>State</strong></td>
<td>Sent for Countersignature</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Purchasing Organization Units</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Expiry Warning Date</strong></td>
<td>11/30/2018 12:00 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Value</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Funds Remaining</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Alert Value</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Funds Allocated</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Linked Contracts</strong></td>
<td>Copy of: 257</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Is Related To: 257</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contract Documents</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Organization Unit</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Category</strong></td>
<td>Access software</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Contract Type</strong></td>
<td>Goods and Services Technology - Academic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Social Media Matching feature using Clearbit Data. SR035055</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Document Requirements</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Background Check Requirement</strong></td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**264 - 2018-ADD-IT-REEHER-SMM FEATURE**

Creighton University > Reeher LLC

<table>
<thead>
<tr>
<th>Leadsheet</th>
<th>Counterpart</th>
<th>Documents</th>
<th>Members</th>
<th>Comments (2)</th>
<th>Workflow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier</td>
<td>Reeher LLC</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.**
The document tab stores signed agreements and any supporting documents.
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.
• All comments are saved and time-stamped.
• Comments should be brief and professional as they are part of the audit trail.
The workflow tab also shows the approver and date/time stamp of approvals.
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.
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.
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.
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”

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