

Supplier Contract Management

For Contract Administrators

Agenda

- Benefits
- Roles
- Contract Types
- Process flow
- Terminology
- Hands-On Exercises
 1. Create a Transactional Contract
 2. Create a Transactional Contract Using Vendor Paper
 3. Create an Ad Hoc Contract
- Instructor Demonstration
 - Finalizing a Contract After Internal Collaboration
- Tips & Resources

Benefits

- ✓ Central Repository for all Northwestern contracts
- ✓ Pre-approved, Northwestern-specific templates in a document library
- ✓ Templates streamline the approval process making it more efficient
- ✓ Collaboration with other stakeholders within a department or school
- ✓ Reviewers automatically included in the review process when appropriate
 - Office of the General Counsel (OGC)
 - Procurement and Payment Services (PPS)
 - Risk Management
 - Northwestern IT
 - Treasury Operations

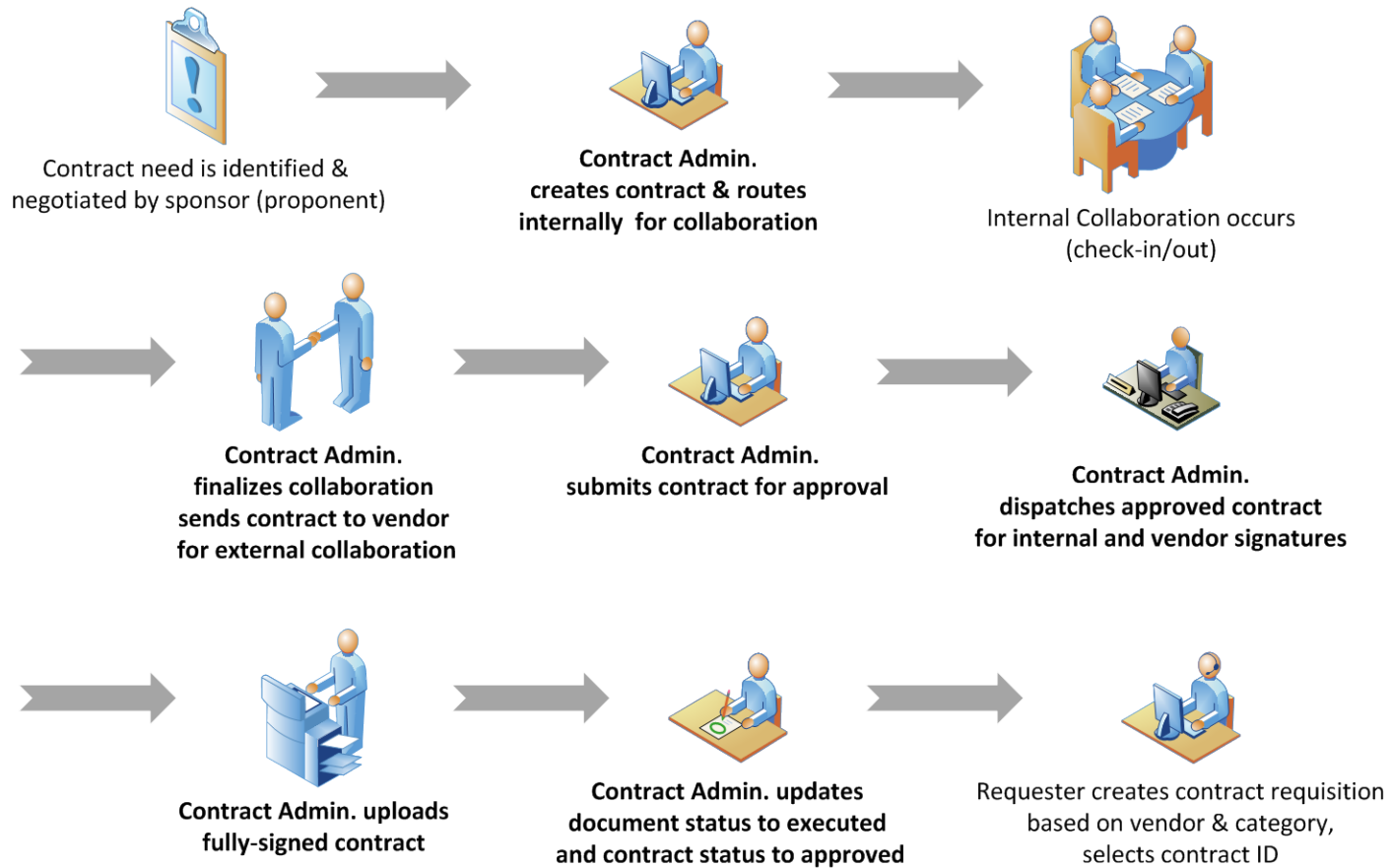
Security Roles

- Contract Librarian
- **Contract Administrator**
- Contract Collaborator
 - Sponsor
 - Contract Signer
- Approvers
 - Clause (if applicable)
 - PPS (>25k)

Contract Types

- Transactional
 - For purchase of goods or services
 - Used with a Requisition
 - May use vendor paper
- Ad-Hoc
 - Non-monetary (non-disclosure, media release, etc.)
 - May use vendor paper

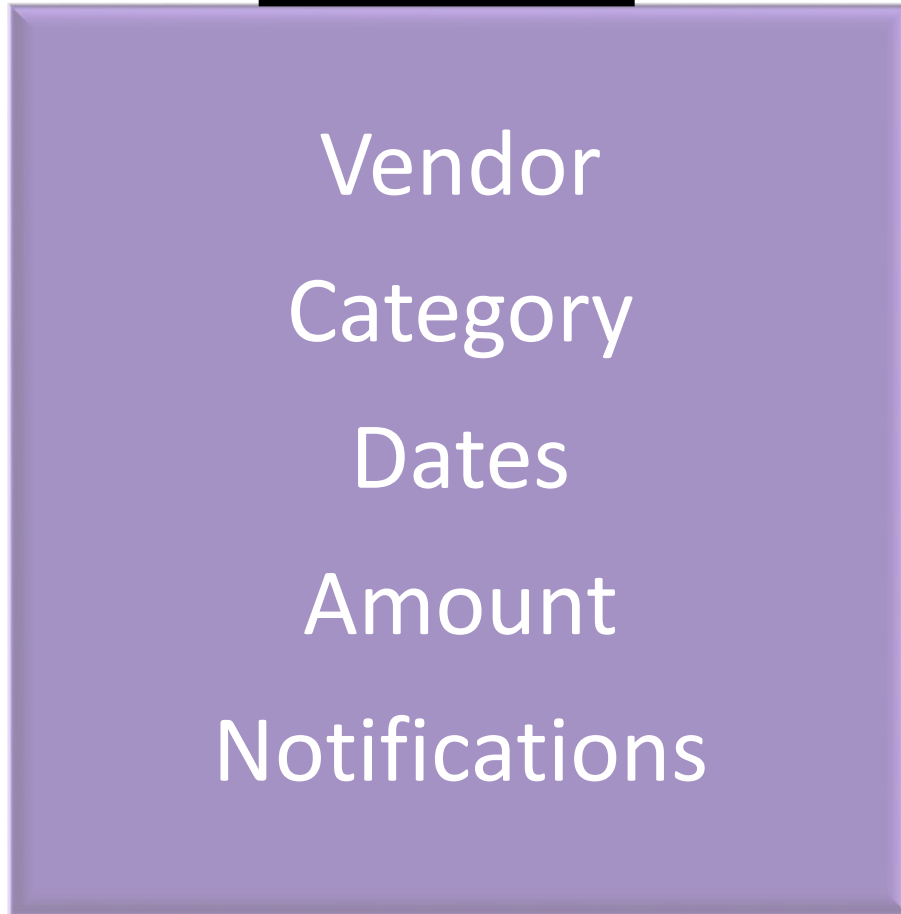
Contract Management Process



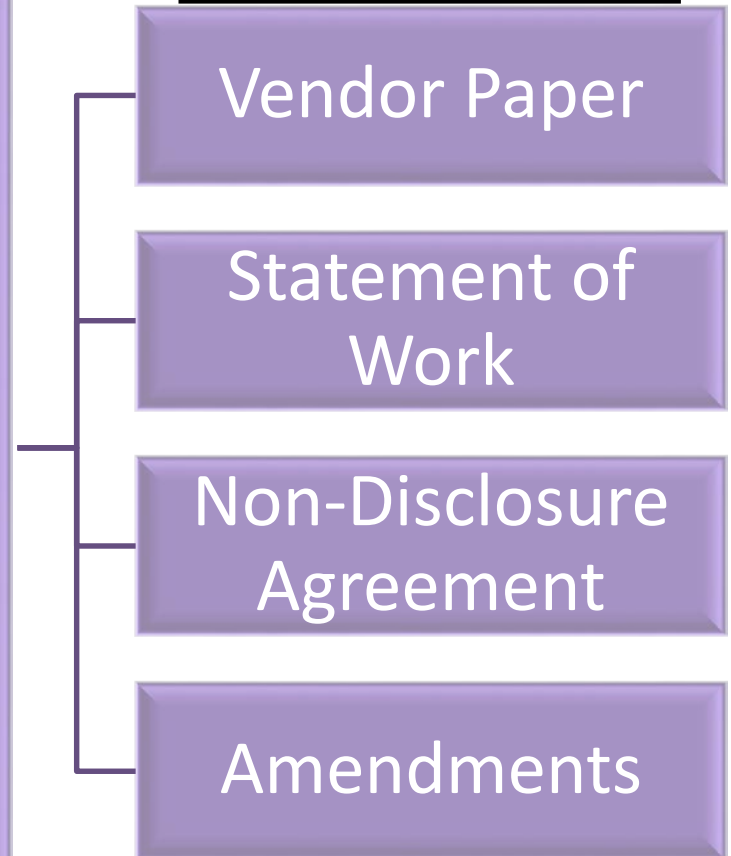
Terminology

- Collaborate – review and/or edit a document
- Vendor Paper – vendor supplied contract
- Executed – contract signed and scanned in NUFinancials
- Sponsor – identifies contract need, proponent, collaborates

Contract



Documents



Training Scenario

You work in WCAS and are creating contracts for an upcoming conference you are hosting.

1. Transactional Contract for keynote speaker
2. Transactional Contract for caterer supplying their own document (vendor paper)
3. Ad-Hoc Contract for alcohol rider associated with catering contract

Document Tips

- ✓ View or Edit – open in Word 2007 (or later)
- ✓ Do not open in browser plugins
- ✓ Save file in a desktop folder in the original XML format
- ✓ Do not change contract file names!
- ✓ Delete old files from desktop folder as needed

Internal Collaboration begins

Collaboration Request Email

Your collaboration is requested for Document "ADH0000107".

A contract needing your review has been routed to you as part of the contract collaboration process. After reviewing the contract, please make sure to include your comments and indicate that you have completed the collaboration process.

Contract Details:

Document: ADH0000107
Contract Description: Vendor Paper
Date Created: 2016-07-27-15.53.12.000000
Amendment: 0
Document Owner: Bieniasz, Raymond A F
Created By: Bieniasz, Raymond A F

Instructions:

If you need assistance or have questions contact:

Keith Paddy
eProcurement Manager
Financial Operations Procurement and Payment Services
(847) - 467-6963

You can navigate directly to the Document Management page by clicking the link below.

http://fms854qaweb.ci.northwestern.edu/psp/fmptqa/EMPLOYEE/ERP/c/CONTRACT_MGMT.CS_DOC_MAINT.GBL?Page=CS_DOC_MAINT&Action=U&CS_DOC_ID=165

Collaborator Steps

1. Email Notification/Worklist
2. Document Management
 1. View or Edit
 2. Add collaboration comments (initialing a page)
 3. Mark as Reviewed

After Internal Collaboration

Collaboration Complete Email

From: peoplesoft@peoplesoft.com [<mailto:peoplesoft@peoplesoft.com>]

Sent: Friday, October 14, 2016 4:31 PM

To: Randall T Henry <r-henry2@northwestern.edu>

Subject: Document Collaboration Complete for Contract "ADH0000027", "New Tent Collaborator Test"

Your contract has been reviewed, and the collaboration process is now complete. Please submit the contract for approval or signature.

Contract Details:

Document: ADH0000027

Contract Description: New Tent Collaborator Test Date Created: 2016-10-14-13.22.08.000000

Amendment: 0

Entered By: Kennedy,Mark Allen

Document Owner: Kennedy,Mark Allen

If you need assistance or have questions contact:

Keith Paddy

eProcurement Manager

Financial Operations Procurement and Payment Services

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You can navigate directly to the Document Management page by clicking the link below.

http://fms854supweb.ci.northwestern.edu/psp/fm91sup/EMPLOYEE/ERP/c/CONTRACT_MGMT.CS_DOC_MAINT.GBL?Page=CS_DOC_MAINT&Action=U&CS_DOC_ID=42

Transactional Contract

1. Contract Entry
2. Create Document
 - Document Wizard questions
3. Document Management
 - A. Route for collaboration
 - B. Finalize Collaboration
 - C. Send to (external) contacts
 - D. Submit for approval
 - E. Obtain internal and external signatures
 - F. Dispatch document
 - G. Execute document
 - H. Change contract status to “Approved”

Ad-Hoc Contract

1. Add a Document
2. Create Document
 - Document Wizard questions
3. Document Management
 - A. *Route for collaboration (optional, except CORE)*
 - B. *Finalize Collaboration*
 - C. Submit for Approval
 - D. Send for signatures
 - E. Attach signed contract

Appendix - Options

- Refresh – change contract type/repeat Document Wizard questions
- Recreate – re-answer Document Wizard questions
- Deactivate – remove, not delete a document
- Amendment – change to a fully executed contract

Resources

Keith Paddy

- 847.467.6963
- k-paddy@northwestern.edu

Samantha Kustra

- 847.467.0839
- s-kustra@northwestern.edu

<http://www.northwestern.edu/procurement/>