Table of Contents

CLICK ANY TOPIC TO JUMP TO THAT SECTION OF THE DOCUMENT

Helpful Links

Contract Director

https://contracts.sciquest.com/UCOP/Account/LogOn?ReturnUrl=%2fucop

Contract Repository

https://solutions.sciquest.com/apps/Router/Login?OrgName=UCOP&URL

Training Resources on Procurement Website

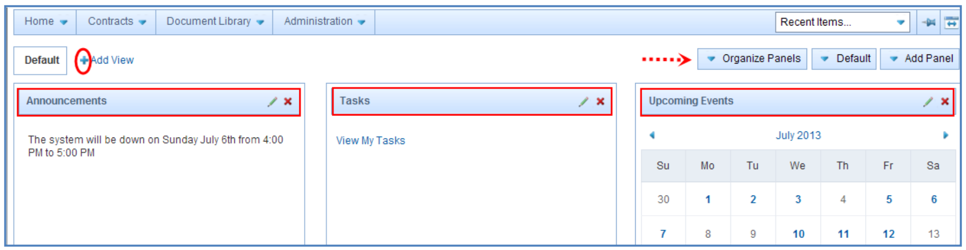
http://www.ucop.edu/procurement-services/policies-forms/system-training/index.html

Home Page

Welcome for **Password Management** and **Out of Office** agent.

Help for links to online help. Context-specific help is also available by clicking the on any page within Contract Director.

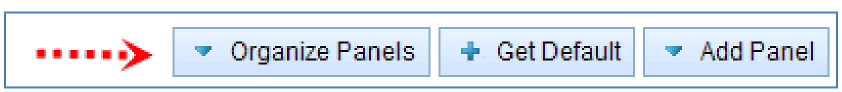
Dashboard



The Dashboard consists of various **panels** showing information about the system. The default view contains the following three panels:

- **Announcements**: Shows messages from the System Administrator.
- **Tasks**: Displays a summary of your workflow tasks.
- **Upcoming Events**: Shows a monthly calendar where you can hover over bolded dates to see a list of events taking place in the system.

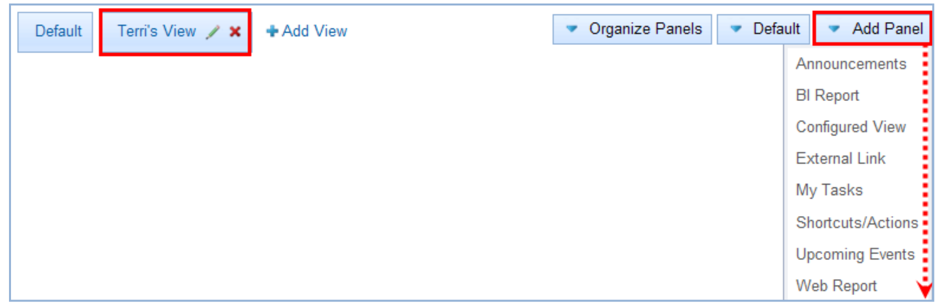
Click and drag the panels to rearrange the layout, or customize the content using the **Organize Panels** and **Add Panel** buttons.



- Create multiple dashboard views by clicking the **Add View** link.

- Rename the **New View** using the edit pencil.

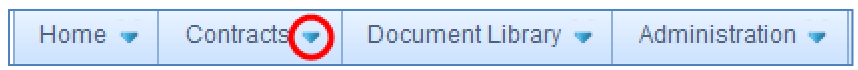
- Click the **Add Panel** button to add content to your custom view and **Organize Panels** to customize the layout.



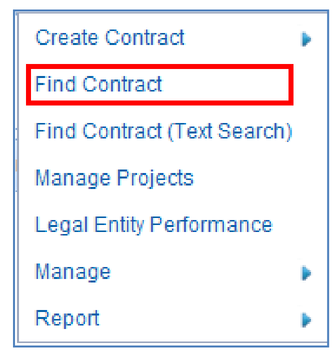
- Toggle back to the original view at any time by clicking the **Default** button.

Find Contracts

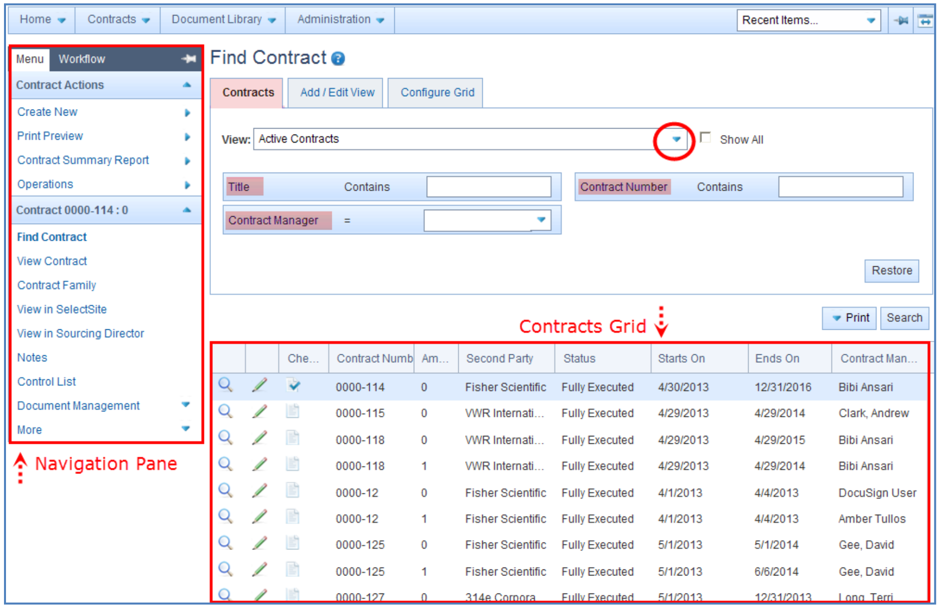
Access the Contracts module from the Menu Bar of the application.



- From the Contracts drop-down menu, select **Find Contract**.
- Once you have landed on the **Contracts** page, a list of available actions will appear in a **Navigation Pane** on the left. A list of contracts will appear in the **Contracts Grid** in the center of the page.



Questions? Please contact your Supplier Registration & Sourcing (SRS) Campus Primary Rep.

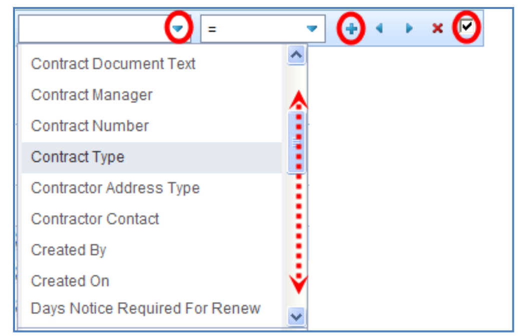


- Use the **View** drop-down menu to toggle between:
  - Active Contracts
  - Contracts w/Missing Information
  - In Process Contracts
  - Default View
- Enter criteria into the **Search Fields** (called "**Expressions**" in Contract Director) to find specific contracts.
- The grid will update to display contracts that match the **view** and **search criteria** you have selected.

Add/Edit View

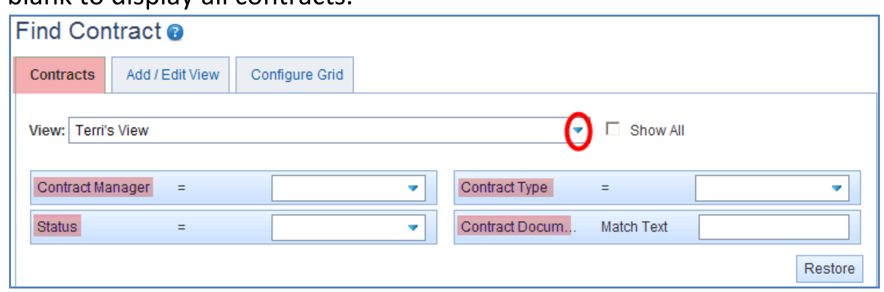
The default view can be edited to include additional search fields (or "Expressions"). You can create multiple custom views and easily toggle between them. Create a custom view using the **Add / Edit View** tab.

- On the **Add/Edit View** tab, click **New** and enter a **View Name**.
- Select the **Default** checkbox to see this view when you login.
- Click **Add Expression** to add search fields to your custom view.



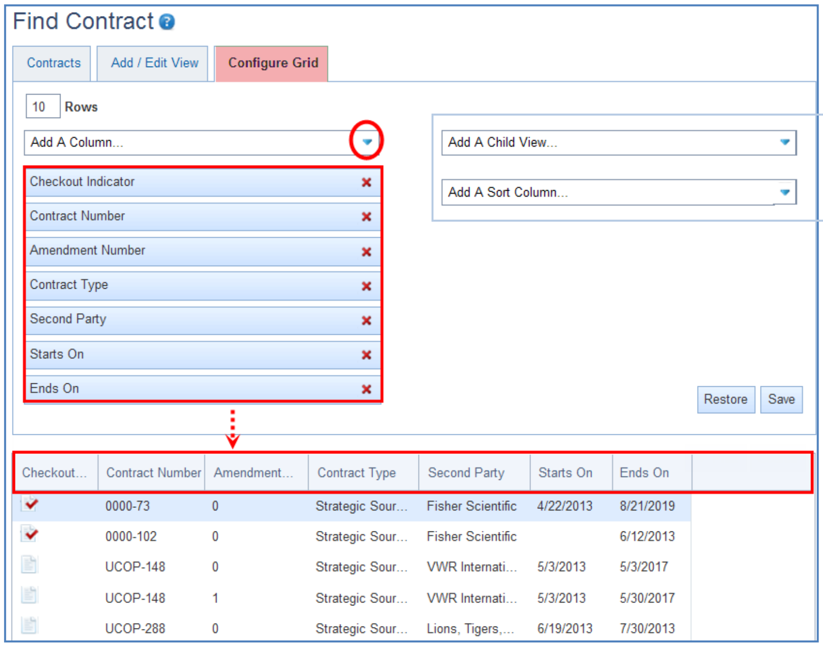
- Use the drop-down to select an Expression (i.e., **Contract Manager**, **Contract Type** or **Contract Status**)
- Select the Checkbox to activate the selection.
- Click **+** to add the next expression.
- Click Save.

The **Find Contract** page will now default to your custom view. Enter search criteria into the new fields to filter the list of contracts, or leave the fields blank to display all contracts.

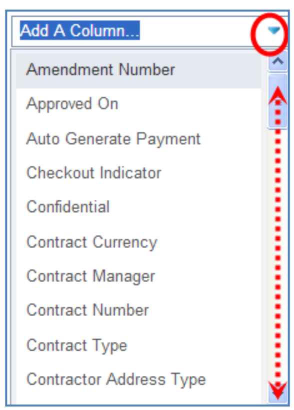


Configure the Contracts Grid

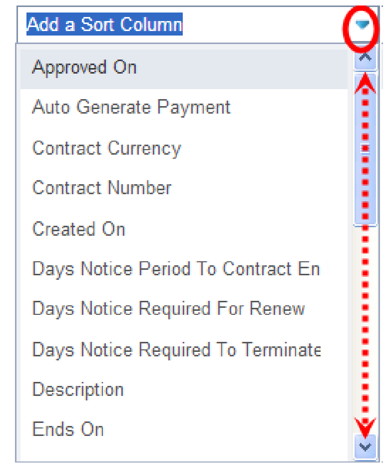
On the **Configure Grid** tab you can add, remove or rearrange the columns in your grid. A list of columns currently in the grid appears at the top of the page.



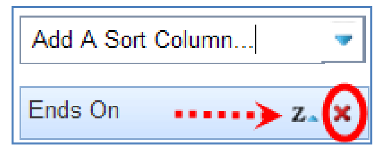
- In the column listing, click the **×** to **remove columns** from your grid.
- Drag the column names up or down in the list to **rearrange the order** in your grid (the first item in the list will be Column 1, the second item will be Column 2, etc.)
- Click the **Add a Column** drop-down menu to **add columns** to your grid. The list contains 57 options for column headings.



Add Sort Columns allows you to determine how the contracts in your grid are sorted (by **Contract Number**, **Date Created**, etc.). The list contains 24 options for sorting columns.



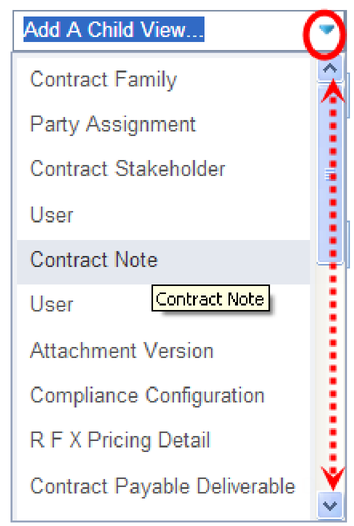
- After you have made your selection, click the "**Z**" to toggle between Ascending and Descending order.

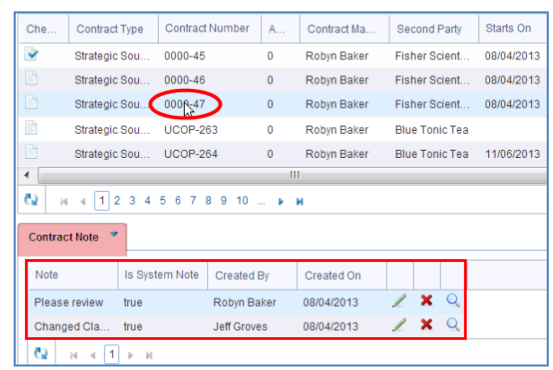


- Click the **×** to remove the selection.

Add A Child View allows you to see specific details on a contract without having to open the contract (i.e., **Contract Notes**). The details will display in a separate grid below the contracts grid.

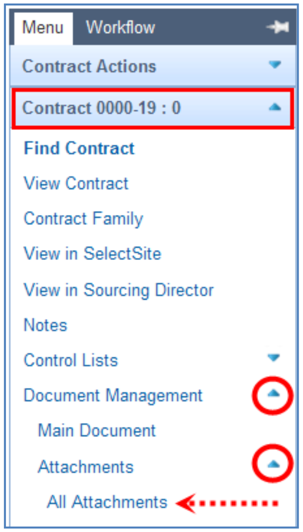
- Click any contract in the grid and the **Child View** will display the details pertaining to that contract (i.e., **Contract Notes**).



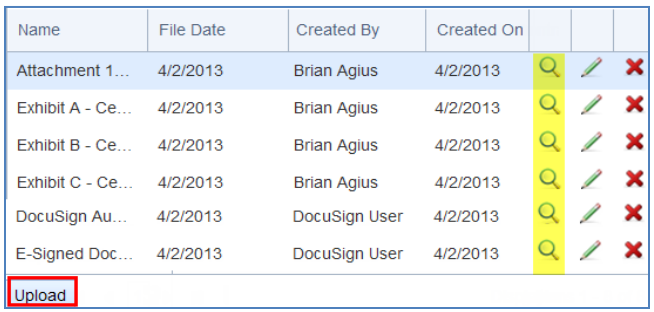


Add Attachments

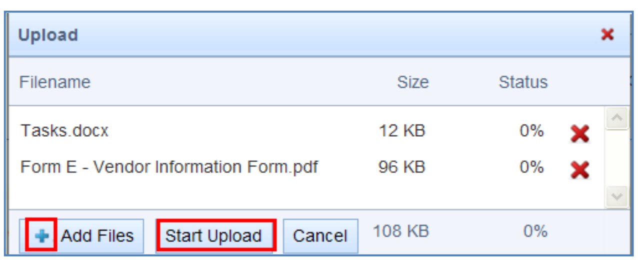
When you select a contract in the Grid, a list of available actions will appear in the **Navigation Pane** on the left. The **Attachments** function allows you to review, remove or upload new documents.



In the navigation pane on the left, drill down to **Document Management > Attachments > All Attachments.** If necessary, use the to expand or collapse sections. All existing **Attachments** will be displayed in the grid.

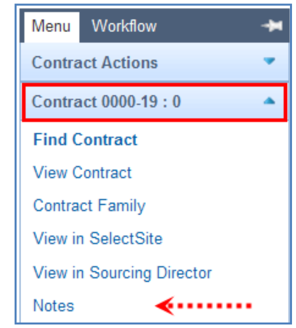


- Click to view existing **Attachment**s.
- Click Upload to attach a new document. A new window will open for the upload.
- In the **Upload** window, click Add Files to browse your computer and select files to upload.
- Click the **Start Upload** button to import the selected files.



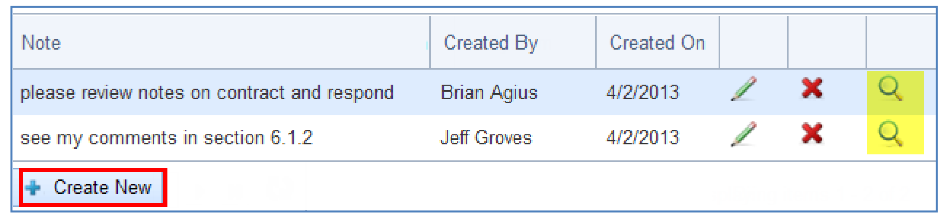
Add Notes

To review contract notes, or add new notes, locate the desired contract in the Grid and select **Notes** from the **Navigation Pane**.

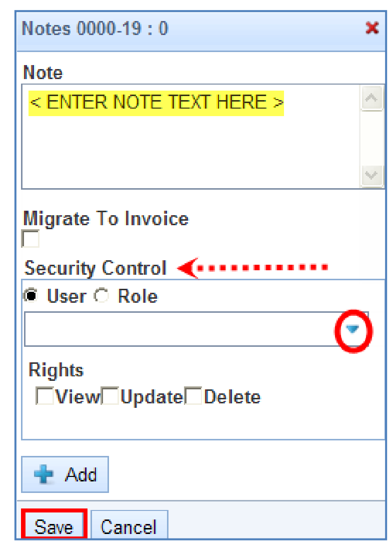


All existing **Notes** will be displayed in the grid.

- Click to view existing **Notes**.
- Click Create New to add a note to the contract. A new window will open where you will enter text and security options (if any) for the new note.



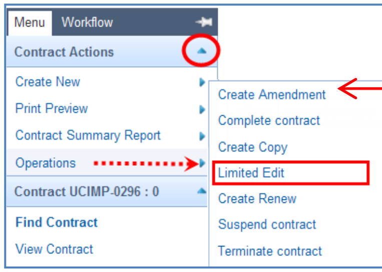
- The default security setting allows the note to be viewable by all system users. If you would like to restrict viewing to a specific **User** or **Role** (i.e., Commodity Managers), use the drop down to make the desired selection.
- Click Save



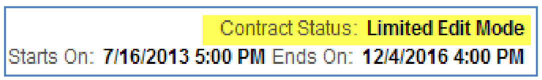
Limited Edits

The **Limited Edit** feature allows you to make minor changes to the contract header fields that do not require a signature by the parties (i.e., assign a new Contract Manager).

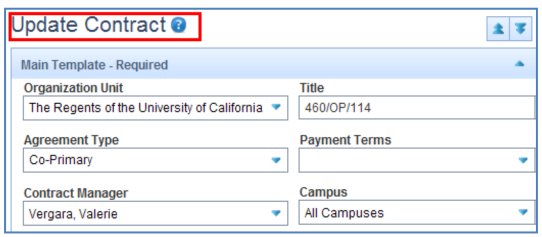
Locate the desired contract and use the navigation pane to drill down to **Contract Actions > Operations > Limited Edit.** Use the to expand or collapse sections.



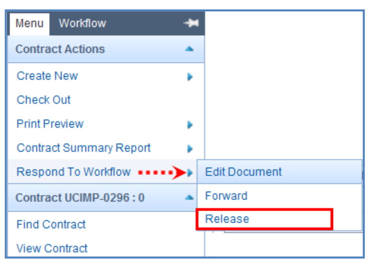
- The contract will open in "**Limited Edit Mode**" status and the header fields will be available for edit. (The contract status is visible in the upper right corner of the screen.)



- Make the necessary updates to the contract header fields. **Note**: If necessary, the text in **non-required fields** can be deleted altogether.



- Click **Save**.
- **The updated contract must be released in order for the edits to take effect.** Navigate to Contract Actions > Respond to Workflow > Release.



- The status will return to **Fully Executed** and the edits will be reflected on the contract in the repository.

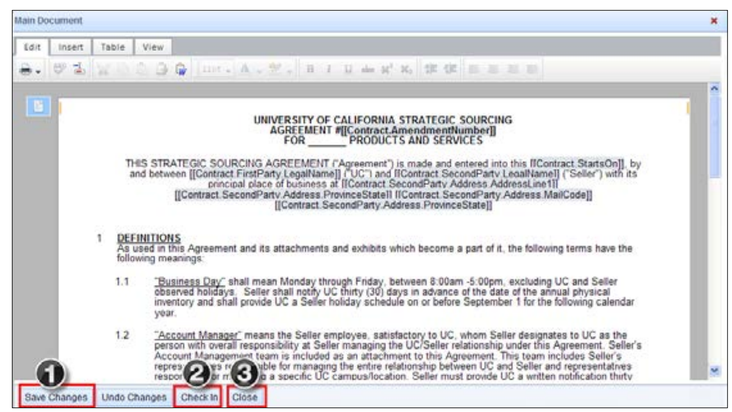
Add an Amendment

Revisions to the actual language, terms or clauses within the contract require an Amendment**. The amendment must be Released into Workflow for Dept. Approval and Supplier Signature** (see Amendment Workflow, p. 8).

Locate the desired contract and use the navigation pane to drill down to **Contract Actions > Operations > Create Amendment**.

- On the Create Amendment page, make the necessary updates to the contract header.
- **Note**: If the **Signature Type** is **All Parties E-Sign**, verify the information in the **ESignature Block** so that **Supplier Email Address** is *Sequence 1* and the internal approver is *Sequence 2*. This will route the amended contract first to the supplier for e-signature. If **Manual Signatures**, no need to update the signature block details.
- Click the **Save** button. This will automatically check out the contract and make it available for editing.

Navigate to **Contract > Document Management > Main Document** to make edits to the actual contract document.

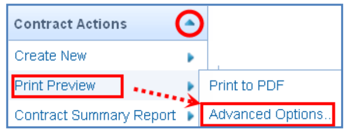


- When all edits have been made:
  1. **Save**
  2. **Check In**
  3. **Close**

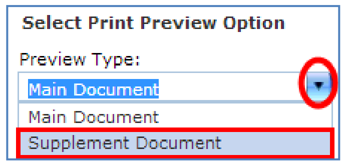
The Amendment must now be Released into Workflow for approval (p. 8).

The actual **Contract Amendment** is captured in a *supplemental document* which contains an overview of the clauses that have been added, deleted and/or modified, along with a signature line for each party.

- To review the supplemental document, navigate to **Contract Actions > Print Preview > Advanced Options**.



- In the Print Preview Option window, use the drop-down to change the **Preview Type** from **Main Document** to **Supplemental Document.**

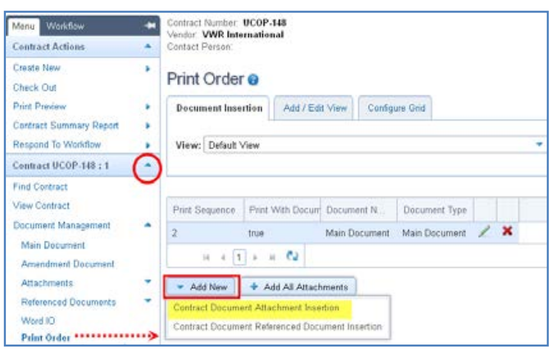


- If the contract calls for **Manual Signature s**, establish the print order before submitting Amendment for manual signatures (see p. 3).
- If the contract calls for **ESignatures**, establish the print order before submitting the Amendment into workflow for esignatures (see p. 3).

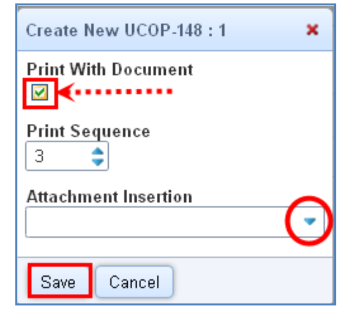
Set Print Order

You must establish a Print Order to ensure that any attachments that should be included for eSignature are added to the contract. Navigate to **Contract > Document Management > Print Order**.

- Click Add New and select ***Contract Document Attachment Insertion***.



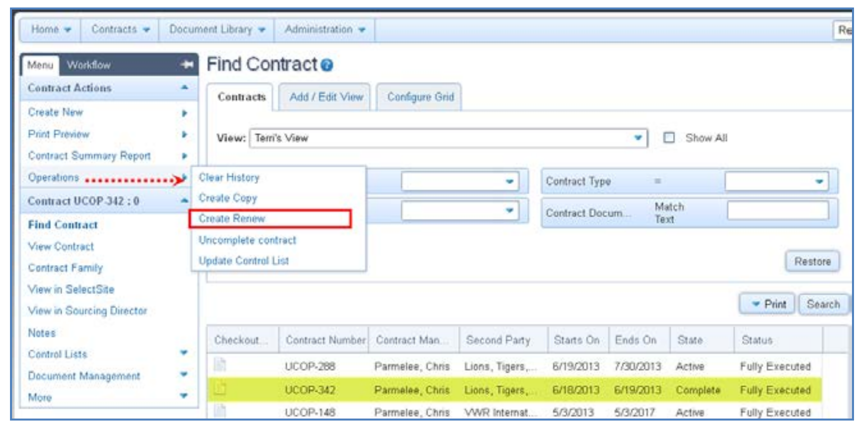
- In the upload window, select the **Print With Document** checkbox.
- Update the **Print Sequence**, if necessary.
- Use the drop-down arrow to browse to the attachment or amendment.
- Click Save



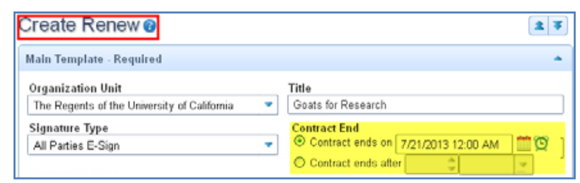
The attachment is now a part of the contract document and is ready to print for manual signatures or submit into workflow for electronic signatures.

Renew a Contract

Locate the contract in the grid and avigate to **Contract Actions > Operations > Create Renew**.

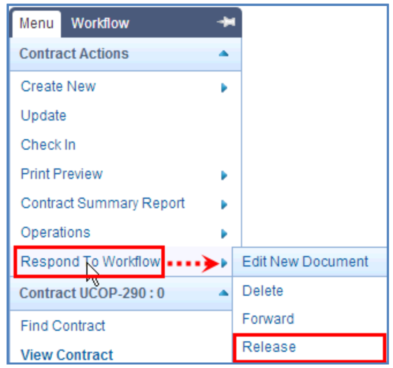


- Update the necessary Header fields, including a new **Contract End** date.
- Click Save

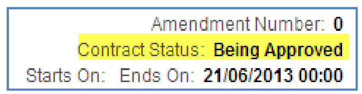


Amendment Workflow

Workflow is the path the amendment must follow to get approved. To release the amendment into workflow navigate **Contract Actions > Respond to Workflow > Release**.



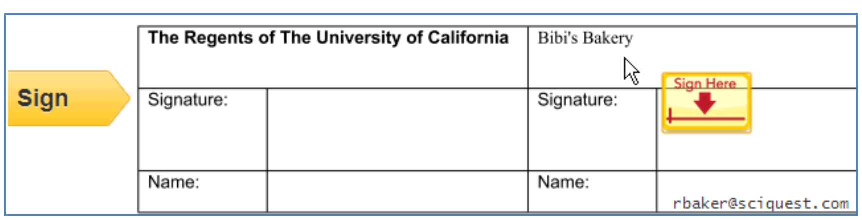
- The status of the amended contract will change to "**Being Approved**" and is awaiting action by the contract approver.



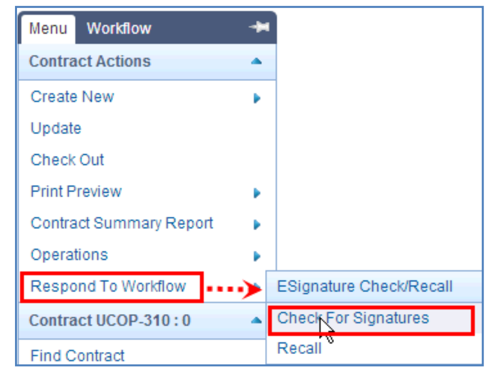
- Once the amendment is approved, you will receive an email notification that the contract is ready for signatures and the status will change to **Pending eSignatures** or **Pending Signatures**, as applicable.

eSignature Workflow

A system-generated email will be sent from The Regents of the University of California to the Supplier containing a link and instructions for reviewing and esigning documents.



- After the Supplier has completed the eSignature process, the workflow will route the contract to the internal approver add the internal eSignature.
- Once all parties have esigned, you (the Contract Manager) will receive an email with the e-signed document attached.
- **Important Note**: The contract status does not update automatically after all parties have e-signed. You must complete the process by Checking for Signatures. Navigate to **Contract Actions > Respond to Workflow > Check for Signatures**.



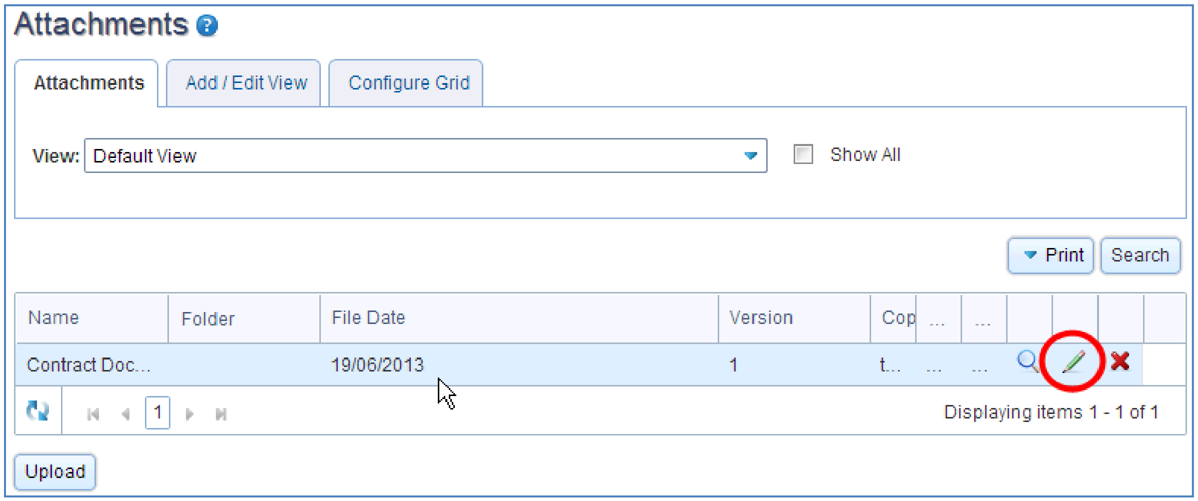
- The system will locate the e-signed document, check for signatures and move the contract back to Fully Executed status.
- After a few minutes the status will change from **Pending eSignatures** to **Fully Executed** (you may need to "refresh" your computer).

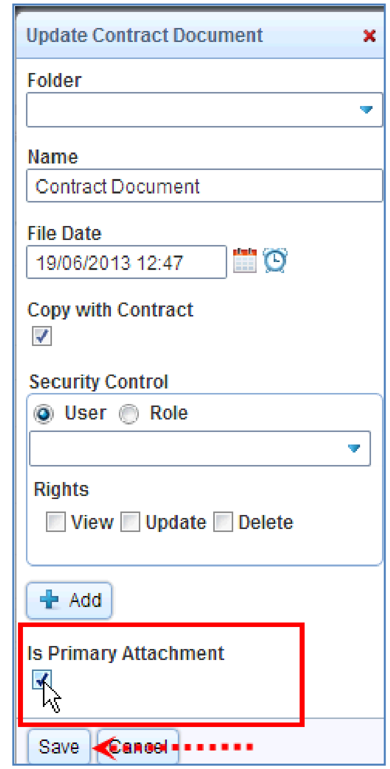
Manual Signatures

To print a hard copy of the Contract Amendment, navigate to **Contract Actions > Print Preview > Print to PDF** and follow the standard processes for obtaining manual signatures.

- The signed document must be scanned and saved onto your computer so that it can be uploaded as an attachment to the contract.
- Navigate to **Contract > Attachments > Upload > Add Files**

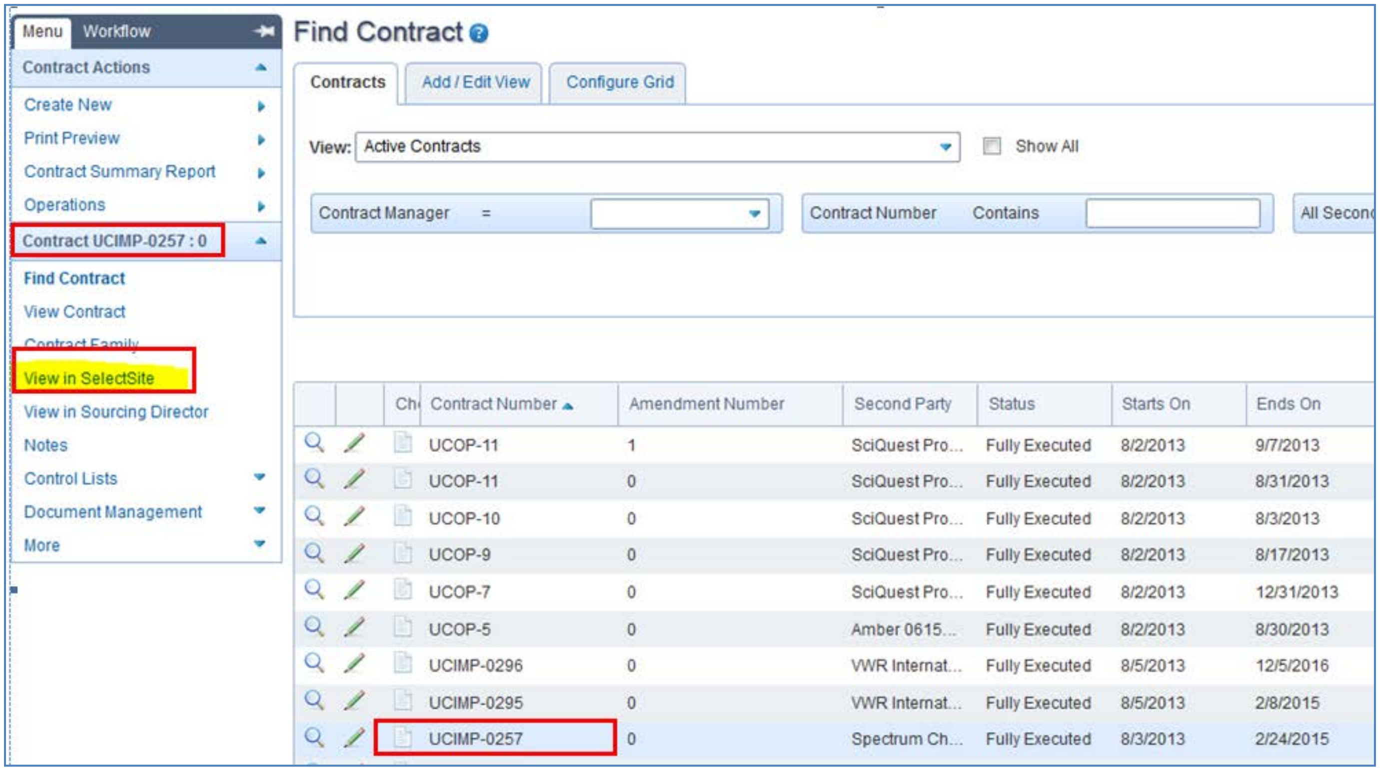
- Browse to the signed PDF document on your computer and upload the file.
- Once the file has been uploaded and attached to the Contract, you can indicate that this is the **Primary Attachment** by clicking the pencil icon and select the Primary Attachment checkbox.
- Click Save



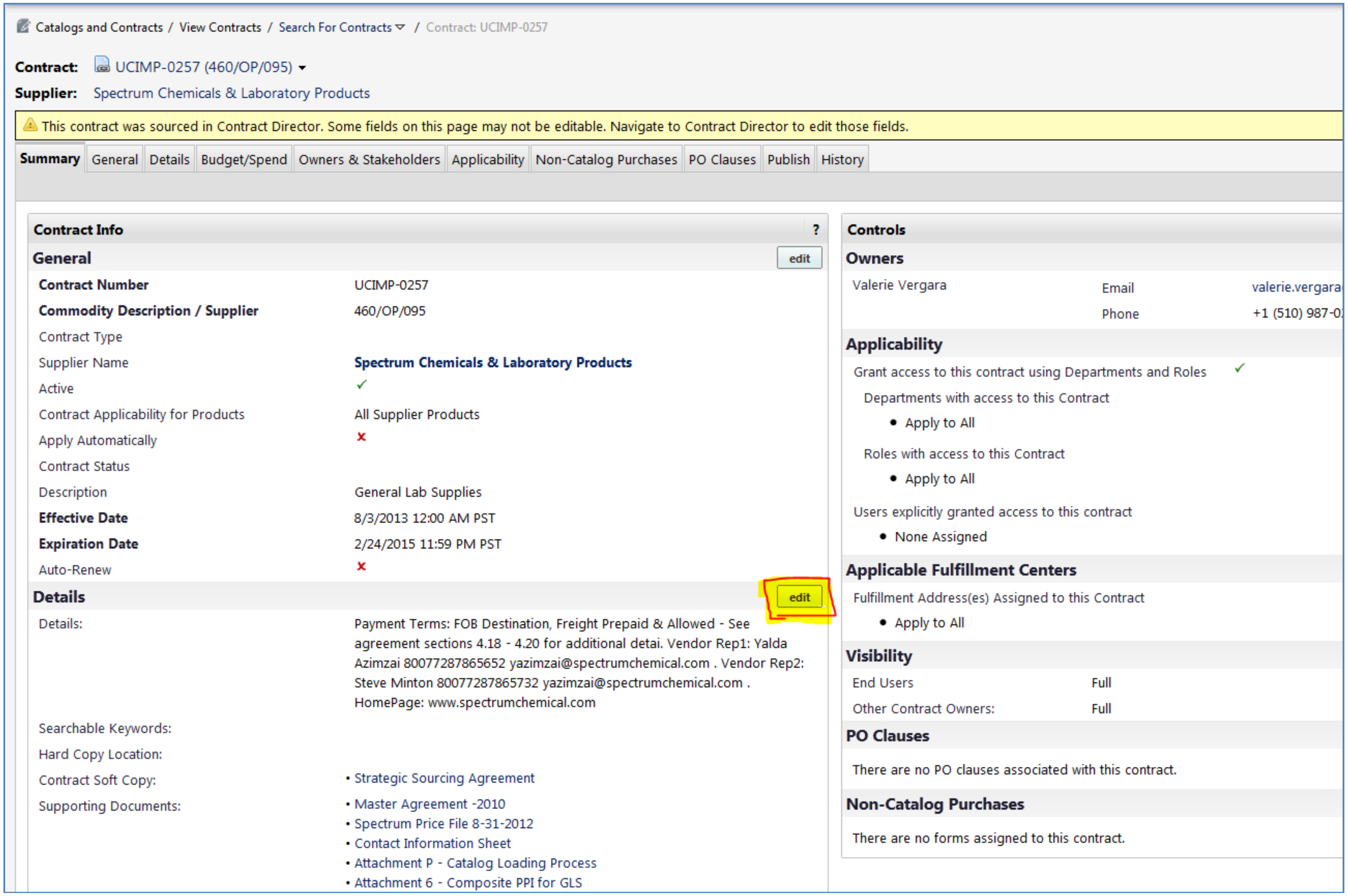


Updating Supplier Information

- Search for the contract you wish to update
- Once you find the contract select it in the search and click the "View in SelectSite" link on the left navigation bar.



- You should be brought into that contract in the Contract Repository.
- Click edit on the details field.
- That will bring you into an edit screen. Make the needed updates and make sure you hit save at the bottom of the page.


Catalogs and Contracts / View Contracts / Search For Contracts / Contract: UCIMP-0257

Contract: UCIMP-0257 (460/OP/095)
Supplier: Spectrum Chemicals & Laboratory Products

This contract was sourced in Contract Director. Some fields on this page may not be editable. Navigate to Contract Director to edit those fields.

Summary | General | Details | Budget/Spend | Owners & Stakeholders | Applicability | Non-Catalog Purchases | PO Clauses | Publish | History

Contract Info

General edit

Contract Number	UCIMP-0257
Commodity Description / Supplier	460/OP/095
Contract Type	
Supplier Name	**Spectrum Chemicals & Laboratory Products**
Active	✓
Contract Applicability for Products	All Supplier Products
Apply Automatically	✗
Contract Status	
Description	General Lab Supplies
Effective Date	8/3/2013 12:00 AM PST
Expiration Date	2/24/2015 11:59 PM PST
Auto-Renew	✗

Details edit

Details:	Payment Terms: FOB Destination, Freight Prepaid & Allowed - See agreement sections 4.18 - 4.20 for additional detai. Vendor Rep1: Yalda Azimzai 80077287865652 yazimzai@spectrumchemical.com . Vendor Rep2: Steve Minton 80077287865732 yazimzai@spectrumchemical.com . HomePage: www.spectrumchemical.com
Searchable Keywords:	
Hard Copy Location:	
Contract Soft Copy:	• Strategic Sourcing Agreement
Supporting Documents:	• Master Agreement -2010 • Spectrum Price File 8-31-2012 • Contact Information Sheet • Attachment P - Catalog Loading Process • Attachment 6 - Composite PPI for GLS

Controls

Owners

Valerie Vergara — Email: valerie.vergara — Phone: +1 (510) 987-0

Applicability

Grant access to this contract using Departments and Roles ✓

Departments with access to this Contract
- Apply to All

Roles with access to this Contract
- Apply to All

Users explicitly granted access to this contract
- None Assigned

Applicable Fulfillment Centers

Fulfillment Address(es) Assigned to this Contract
- Apply to All

Visibility

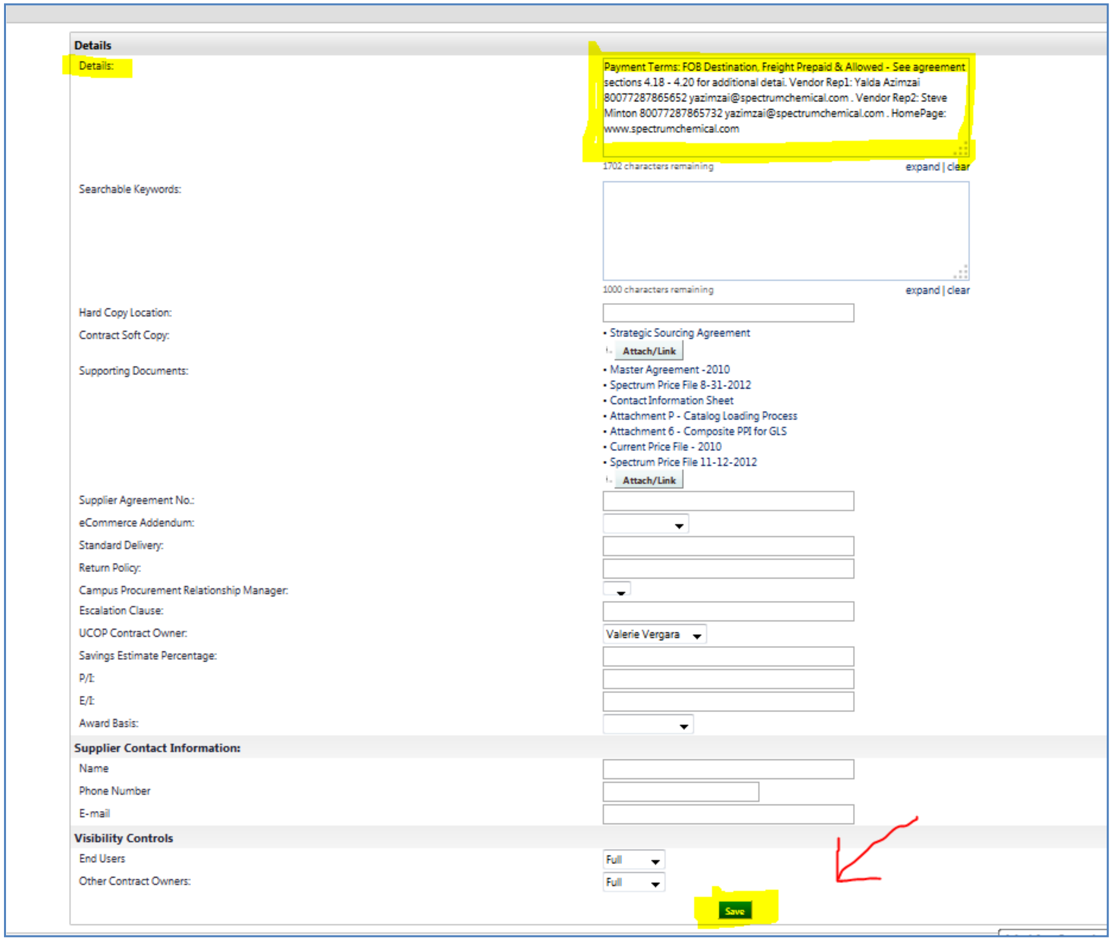
End Users: Full
Other Contract Owners: Full

PO Clauses

There are no PO clauses associated with this contract.

Non-Catalog Purchases

There are no forms assigned to this contract.


Details

Details:

Payment Terms: FOB Destination, Freight Prepaid & Allowed - See agreement sections 4.18 - 4.20 for additional detai. Vendor Rep1: Yalda Azimzai 80077287865652 yazimzai@spectrumchemical.com . Vendor Rep2: Steve Minton 80077287865732 yazimzai@spectrumchemical.com . HomePage: www.spectrumchemical.com

1702 characters remaining expand | clear

Searchable Keywords:

1000 characters remaining expand | clear

Hard Copy Location:

Contract Soft Copy:
- Strategic Sourcing Agreement

Attach/Link

Supporting Documents:
- Master Agreement -2010
- Spectrum Price File 8-31-2012
- Contact Information Sheet
- Attachment P - Catalog Loading Process
- Attachment 6 - Composite PPI for GLS
- Current Price File - 2010
- Spectrum Price File 11-12-2012

Attach/Link

Supplier Agreement No.:

eCommerce Addendum:

Standard Delivery:

Return Policy:

Campus Procurement Relationship Manager:

Escalation Clause:

UCOP Contract Owner: Valerie Vergara

Savings Estimate Percentage:

P/I:

E/I:

Award Basis:

Supplier Contact Information:

Name

Phone Number

E-mail

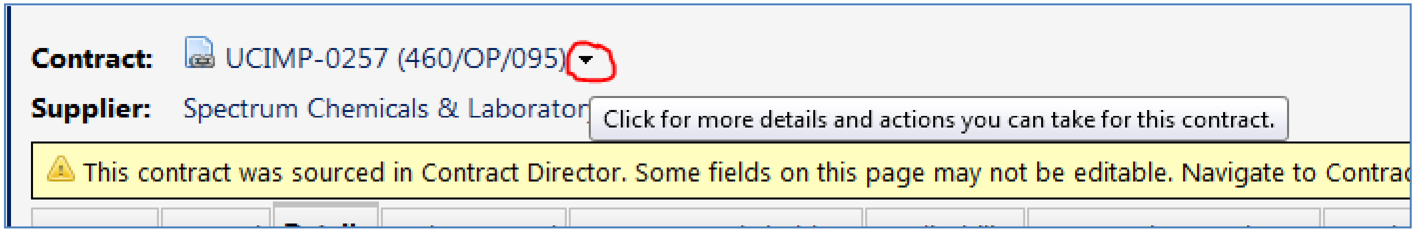
Visibility Controls

End Users Full

Other Contract Owners: Full

Save

- Once you have saved click the arrow next to the contract number and select view in Contract Director. This will take you back into Contract director.


Contract: UCIMP-0257 (460/OP/095)
Supplier: Spectrum Chemicals & Laborator
Click for more details and actions you can take for this contract.
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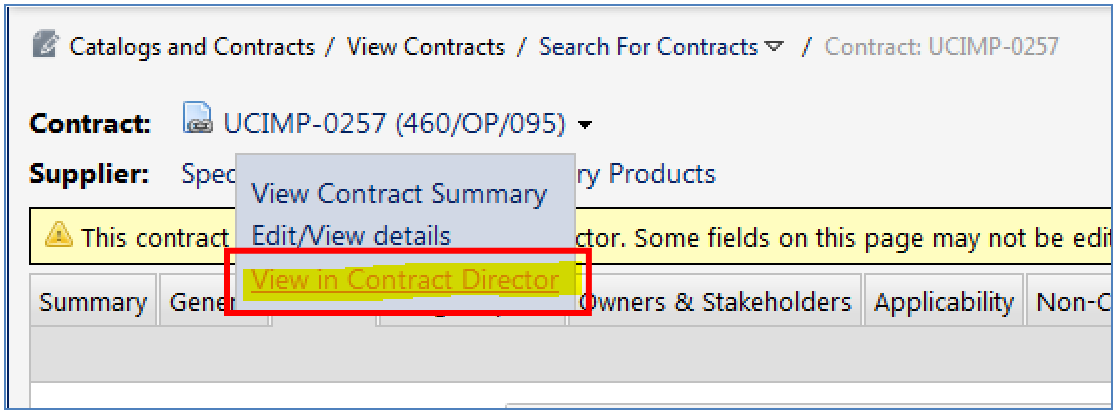
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