UNIVERSITY OF CALIFORNIA

Supplier Registration and Sourcing

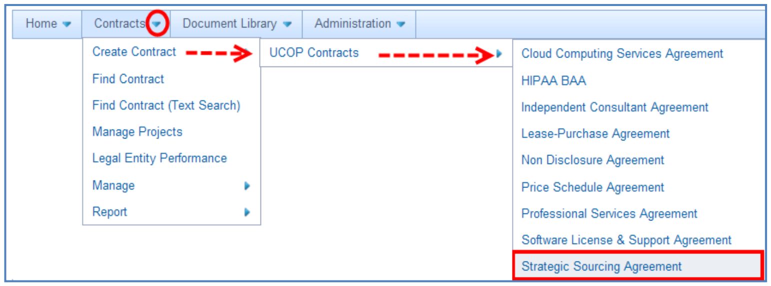
QUICK START GUIDE

Create a Simple Contract in Contract Director

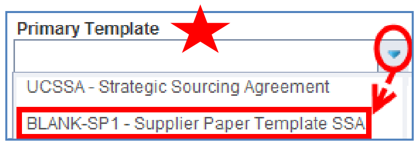
A simple contract requires you to 1) **Create** the Header in Contract Director, 2) **Attach** a fully-executed paper contract, 3) **Assign & Release** the Contract for Manager approval, and 4) **Approve** for release into the Repository.

1. Create Header

Navigate to **Contracts > Create Contract > UCOP Contracts**. Select the Contract Type (Strategic Sourcing Agreement) and complete all required **Header** sections:



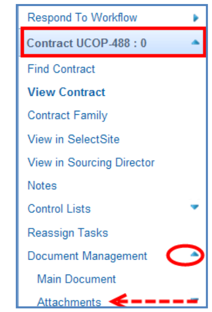
- **Main Template – Required:** Enter appropriate information. Please note the following fields:
  - **Title**: Commodity - Vendor Name (*recommended*)
  - **Agreement Type**: Primary
  - **Signature Type**: Manual Signatures
  - ★ **Primary Template**: Select "**BLANK-SP1 – Supplier Paper Template**"



- **First Party – Required:**
  - **First Party**: Defaults to The Regents of the University of California
  - **Address**: Defaults to UCOP address
- **Second Party – Required:**
  - **Vendor**: Select Supplier from drop-down menu. **Note**: Only Suppliers registered in the SRS System will appear in Contract Director.
- The remaining sections are optional. **Note**: No eSignature Block is required for Manual Signatures.
- When the Header is complete, click **Save**.

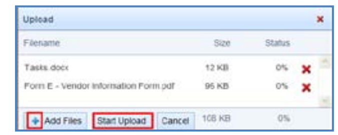
2. Attach Fully-Executed Contract (.pdf)

Once you save the **Header**, the system will assign a Contract Number, the Status will be "**Edit Mode**" and a list of available actions will appear in the Navigation Pane on the left.



Navigate to **Document Management > Attachments > All Attachments**.

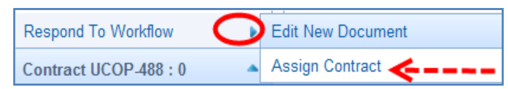
- On the Attachments page, click **Upload**, **Add Files**, select the file from your computer and **Start Upload**. The contract will appear in the Attachments Upload window.



- You must then set the **Print Order** to include the attachment. Navigate to **Document Management > Print Order** and click: Add All Attachments

3. Assign Contract and Release

Navigate to **Respond to Workflow > Assign Contract**.



- Select **your** name from the **User** drop-down list, enter a Note (required) and **Assign Contract**.
- Navigate to **Respond to Workflow > Release** to route the contract to your approver. Once you release, the status will change to "**Being Approved**."

4. Approve for Repository

When your manager has approved the contract, the status will change to "**Pending Signatures"** and the workflow will route it back to you, the contract owner, for the final approval.

Navigate to **Respond to Workflow > Approve.** Once you make the final approval, the status will change to "**Fully Executed**" and the contract will be visible in the Repository the following business day.