

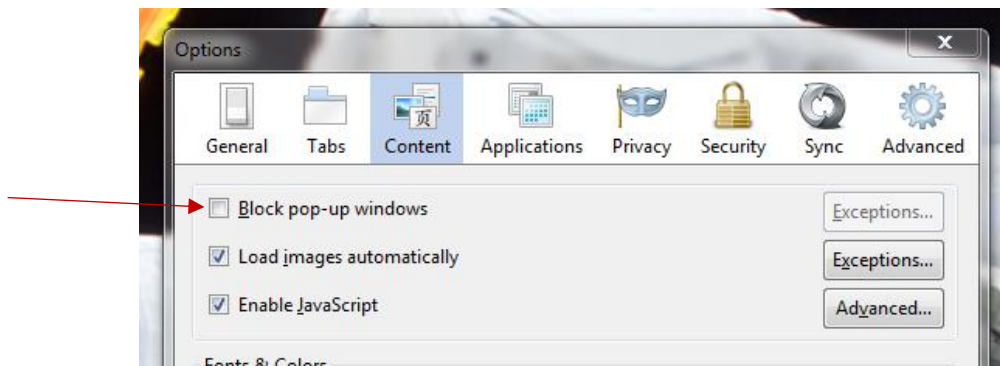
Step-by-Step Instructions for using the Contract Management (“CM”) System

Getting Started

- Using Mozilla Firefox or Google Chrome, log into <https://universityoftennessee.enterprisewizard.com/logins/utenn-login.htm> .



- Please disable all pop-up blockers for your web browser.
 - For Mozilla Firefox:
 - Click on the “Firefox” drop down menu, and select “Options.”
 - Click on “Content,” and uncheck the “Block pop-up windows” box.



- For Google Chrome:
 - Go to `chrome://settings/content`
 - Click to select the “Allow all sites to show pop-ups” radio button.

- Pop-ups
- ☒ Allow all sites to show pop-ups
 - ☐ Do not allow any site to show pop-ups (recommended)
- [Manage exceptions...](#)
- Log In
 - Your Username is your UT NetId.
 - Password:
 - First Log In
 - click the “Forgot password” hyperlink, to set up a new password.
 - Subsequent Log Ins
 - Go to the “My Profile” tab to change your password.
 - Under the “Contact Information” tab, in “User Information,” click on the “Change Password...” link.

User Information

LDAP User ID: portal

Primary Team: Contract Approvers

Group:

Password: [Change Password...](#)

Note: Please include the Primary Team value in the Teams field

Teams:

[Save](#) [Cancel](#) << >>

- Type in the old password, the new password, and confirm the new password.
- Click the “Save” button.

Change Password... - Google Chrome

<https://universityoftennessee.enterprisewizard.com/gui2/>

Old Password

New Password

Confirm New Password

[Save](#) [Cancel](#)

- Use the “Home” tab in the upper left hand corner to return to your home screen

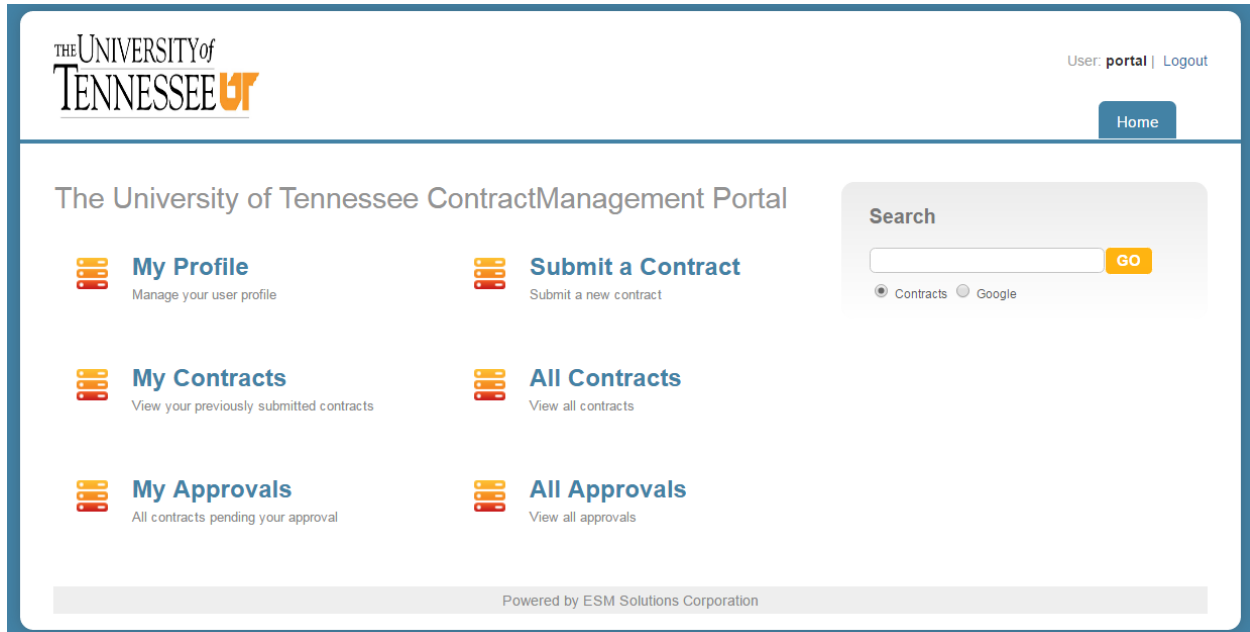


- Temporary Alternate Log In: Click the CM Production System link on the Office of Procurement's website -- purchasing@tennessee.edu.
- Questions: **contracts@tennessee.edu**

The CM System

Home Page Overview

The CM System home page may include the following icons, depending on your permissions:



Icons

- My Profile

My profile

The screenshot shows the 'My Profile' page in the CM System. The page is titled 'Employee' and has tabs for 'Contact Information', 'Job', 'Emails', and 'History'. The 'Contact Information' tab is active. The page contains several fields for user information. A red circle highlights the 'Backup Person' field, which is set to 'Allen Croom 00133991'. Other fields include 'ID' (43086), 'Working Status' (Working), 'First Name' (Test), 'Last Name' (Portal), 'Title' (Tester), 'Email' (contracts@tennessee.edu), 'Department' (Health Science Center Adjustment), 'Department Head' (James Maples 00115008), 'Telephone' (555-555-5555 Ext.66), 'Cell Phone' (666-666-6666), 'Company' (University of Tennessee), 'LDAP User ID' (portal), 'Password' (Change Password...), 'Primary Team' (Contract Approvers), and 'Group'. There are 'Save' and 'Cancel' buttons at the top and bottom of the form.

- To set up a back-up person in “My Profile.”

- Click the magnifying glass next to “Full Name” in the “Contact Information” tab.
- Select the radio button next to “Full Name.”
- Type a name into the search bar.
- Press “Go.”
- Click the radio to select the correct name.
- Click “Import/Replace.”

- Other actions: change password in “My Profile.”
 - Click the “Change Password . . .” link in the “Contact Information Tab.”
 - In the pop-up screen, type in your old password, the new password, and confirm the new password.
 - Click “Save.”

- Home Tab
 - Brings you back to the portal.
 - This tab is located on the upper left hand corner of every screen.

- My Contracts
 - To see all of the contracts that you have entered.

THE UNIVERSITY of
TENNESSEE **UT**

User: portal | Logout

Home

Saved Searches: Show all records Text: GO

Contracts
Status: 15 record(s) found, 1 pages [Click for details...](#)

Search: -TEXT- contains GO

Show All ☐ Refine ☐ String ☐ Context ☐ Active Only ☐ More Options ☐ My Contracts

	Edit	ID	Contract Number	Contract Title	Contract End Date	Vendor Company	Status	Contract Requester	Account	Account Name	Budget Entity
<input type="checkbox"/>		14978	9500003967	Testing UCO	08/16/2016	WEST ALLEY BBQ	Submitted for Review	Test Portal	E170145040	Treasurer- Contracts	17
<input type="checkbox"/>		14977	9500003966	Test A/P	08/17/2017	WEST ALLEY BBQ	Active	Test Portal	E170145040	Treasurer- Contracts	17
<input type="checkbox"/>		14934	9500003935	BBQ Luncheon for Andy Holt Staff Members	10/01/2017	2 DUDES BBQ	Submitted for Review	Test Portal	E170145040	Treasurer- Contracts	17
<input type="checkbox"/>		14895	9500003902	BBQ Catering Event for the Library	01/02/2017	2 DUDES BBQ	Submitted for Review	Test Portal	E170145040	Treasurer- Contracts	17
<input type="checkbox"/>		14889	9500003900	2 Dudes BBQ Luncheon for Andy Holt Staff Members	08/24/2016	2 DUDES BBQ	Submitted for Review	Test Portal	E170145040	Treasurer- Contracts	17
<input type="checkbox"/>		14888	9500003899	Test Workflow Approval	08/31/2016	WEST ALLEY BBQ	In Review	Test Portal	E170145040	Treasurer- Contracts	17
<input type="checkbox"/>		14855	9500003897	Agreement with Roane State Registrar	06/30/2017	ROANE STATE COMMUNITY...	Submitted for Review	Test Portal	R170133005	THEC Rev Tr Adult Re-Entry 2015 Lane	17
<input type="checkbox"/>		14850	9500003896	BBQ Business Class for Entrepreneurs August 2016	09/02/2016	2 DUDES BBQ	Active	Test Portal	E170145040	Treasurer- Contracts	17
<input type="checkbox"/>		14818	9500003886	2 Dudes BBQ Catering Event for Purchasing	01/02/2017	2 DUDES BBQ	Active	Test Portal	e013148	Test fund name change	17
<input type="checkbox"/>		14813	9500003870	2 Dudes BBQ Luncheon for Andy	12/01/2016	2 DUDES BBQ	Active	Test Portal	e013148	Test fund name	17

Powered by ESM Solutions Corporation

- Shows:
 - The ESM ID number.
 - The 95 ESM contract number.
 - The contract title.
 - The contract end date
 - The vendor company name.
 - The status – draft, submitted for review, in review, active, expired, etc.
 - The contract requestor (end-user).
 - The account number.
 - The account name.
 - The budget entity.

- My Approvals
 - To see all approvals awaiting your action, if you are an approver.
 - (**Note:** Most approvals will occur via an e-mail approval.)

Approvals

Status: 2 record(s) found, 1 pages [Click for details...](#)

Search: -TEXT-	contains	GO	
Show All	Refine	String	Context
Active Only	More Options	my approvals	

Edit	View	ID	Approval Status	Approval Title	Approver(s)	Step Number	Contract ID	Contract Title	Approved/Rejected By	Da
<input type="checkbox"/>		9	Pending Approval	Department Approval	James Maples 00115008 Aldena Phillips 00142793...	1	14856	Hay Contract		
<input type="checkbox"/>		7	Pending Approval	Department Approval	James Maples 00115008 Aldena Phillips 00142793...	1	14888	Test Workflow Approval		

- All Contracts
 - To see all of the contracts across the entire university system.
 - (**Note:** This is different from IRIS where you can only see the contracts according to your IRIS permissions, which are tied to your base funds center.)

User: portal | Logout

[Home](#)

Saved Searches: Show all records Text: GO

Contracts

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] Next Last Go to page Go

Search: -TEXT-	contains	GO	
Show All	Refine	String	Context
Active Only	More Options	My Contracts All	

Edit	ID	Contract Number	Contract Title	Contract End Date	Vendor Company	Status	Contract Requester	Account	Account Name
<input type="checkbox"/>		18163	9500006900	UT CFO AIRPORT INTERVIEWS	08/25/2016	HILTON KNOXVILLE AIRPORT	In Review	Bonnie Frank 00242678	E173000001 Human Resources - Special Projects
<input type="checkbox"/>		18160	9500006899	Kelly J Hamilton--Consulting and Instructional Support	09/01/2017	KELLY J HAMILTON	In Review	Lisa Thomas 00313515	R181731102 FDA Natl Fd Safety Crclum Yr 5-Thompson
<input type="checkbox"/>		18157	9500006898	Julia Hart Schlegel--Consulting and Instructional Support	08/31/2017	JULIA HART SCHLEGEL	In Review	Lisa Thomas 00313515	R181731107 TDH COE Collaboration 2016-Thompson
<input type="checkbox"/>		18156	9500006897	Tenant Agreement Patricia A Hagenbucher	10/07/2016	WINDOVER LLC	In Review	Rosemary Webb 00137863	E181720 SMALL AN CLIN SCI
<input type="checkbox"/>		18155	9500006896	James R. Gorny--Consulting and Instructional Support	10/31/2017	JAMES R GORNY	In Review	Lisa Thomas 00313515	R181731105 FDA Expansion of Produce Safety-Thompson
<input type="checkbox"/>		18154	9500006895	Daniel F. Gump Consulting and Instructional Services	08/31/2017	DANIEL F GUMP	In Review	Lisa Thomas 00313515	R181731102 FDA Natl Fd Safety Crclum Yr 5-Thompson
<input type="checkbox"/>		18153	9500006894	John J. Guzewish--Consulting and Instructing Courses	08/31/2017	JOHN J GUZEWICH	In Review	Lisa Thomas 00313515	R181731102 FDA Natl Fd Safety Crclum Yr 5-Thompson
<input type="checkbox"/>		18151	9500006893	Contract for Leadership Institute 2017	03/03/2017	JOHN Q HAMMONS RVOC TR...	Active	Blake Reagan 00263008	E173007001 Leadership Institute
<input type="checkbox"/>		18150	9500006892	Free license for Vet Med	11/11/2016	INTERVETSYS	Active	Blake Reagan 00263008	E180710 Computer Graphics

Page: [Page 1] Next Last Go to page Go

Powered by ESM Solutions Corporation

- All Approvals
 - To see all approvals for your approval group, if you are an approver.

Approvals

Status: 5 record(s) found, 1 pages [Click for details...](#)

Search:

-TEXT-

 contains

GO

Show All

☐ Refine

☐ String

☐ Context

☐ Active Only

More Options

my approvals all

<input type="checkbox"/>	Edit View	ID	Approval Status	Approval Title	Approver(s)	Step Number	Contract ID	Contract Title	Approved/Rejected By	
<input type="checkbox"/>			15	Approved	Department Approval	Cynthia Stockdale 00138446 Pamela Jeffreys 00345077...	1	14977	Test A/P	Mark Paganelli 00138446
<input type="checkbox"/>			13	Approved	Department Approval	Cynthia Stockdale 00138446 Pamela Jeffreys 00345077...	1	14970	Catering for the Fall 2016 Quarterly Office of Lab...	Whitney Clark 00343
<input type="checkbox"/>			9	Pending Approval	Department Approval	James Maples 00115008 Aldena Phillips 00142793...	1	14856	Hay Contract	
<input type="checkbox"/>			7	Pending Approval	Department Approval	James Maples 00115008 Aldena Phillips 00142793...	1	14888	Test Workflow Approval	
<input type="checkbox"/>			3	Approved	Department Approval	Cynthia Stockdale 00138446 Pamela Jeffreys 00345077...	1	14796	Amendment # 1 to TrueScreen background...	Blake Reagan 00263

- Submit a Contract
 - This is the tab that you use most often.
 - This is where you go to submit a contract for review.

User: portal | Logout

Home

Submit a Contract

Contract

*Vendor Company:

*Contract Title:

*Record Type:

Fund & Budget Entity Information

*Account: *Account Name:

*Fund Center Name: *Account Department Code:

*Budget Entity: *Budget Entity Name:

Contract Information

Contract Description:

*Contract Category: Contract Type:

Encumbrance?: *Foreign Contract?:

*Contract Start Date: *Contract End Date:

Notification Name(s):

Notes

Documents - To be completed by Accounts Payable Only

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To Enter a Contract

Click on the “Submit a Contract” tab on the home page.



Submit a Contract

Submit a new contract

- You will see 4 tabs across the top of your screen: Contract Info, Document, Receivable Info, and Approvals.

This screenshot shows the top portion of the 'Submit a Contract' page. At the top left is the University of Tennessee logo. At the top right, it says 'User: portal | Logout' and a 'Home' button. Below this is a blue header bar with the title 'Submit a Contract'. Underneath the header is a light blue box containing a 'Contract' icon, 'Save' and 'Cancel' buttons, and four tabs: 'Contract Info', 'Document', 'Receivable Info', and 'Approvals'. The 'Contract Info' tab is highlighted with a red rectangular box.

- Vendor Company
 - Type the vendor company name into the field, and choose the appropriate vendor company name from the drop-down menu; OR
 - Click the magnifying glass to search for the vendor company name.

This screenshot shows the 'Vendor Company' search field. It features a light blue header with a 'Contract' icon, 'Save' and 'Cancel' buttons, and the same four tabs as the previous screenshot. Below the tabs is a search bar with the label '*Vendor Company:' followed by a text input field and a magnifying glass icon. A red arrow points to the search bar area.

- Select “String” and “Company Name.”
- Type in the vendor company name, and click “Go.”
- Click the radio button to select the appropriate vendor company name.
- Click “Import/Replace.”

Look up Company - Google Chrome

https://universityoftennessee.enterprisewizard.com/gui2/record/dao3_search.do;en;page=7C6E3EE17011E3

Search again: **GO** [Advanced Search](#) Create new -- Select

☒ String ☐ Context

Search in the [Company](#) table and its subtables:

☒ Company Name ☐ All text fields

☐ All linked fields

Import/Replace **Cancel** **Clear Field and Close**

Companies

Companies

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page **Go**

Edit	ID	Vendor Number	Company Name	Telephone	City
<input type="radio"/>	131004	3003355	ALATA FOR EDUCATION		DUBAI
<input type="radio"/>	131003	1137459	PAUL LYNCH		ST. LOUIS
<input type="radio"/>	131002	1137458	ROANOKE ELECTRONIC CONTROLS, INC		ROANOKE
<input type="radio"/>	131001	1137457	HEATHER LOVE		NEW YORK
<input type="radio"/>	131000	1137456	WANDA DARLENE OVERTON		ROBBINS

Page: [Page 1] [Next](#) [Last](#) Go to page **Go**

Import/Replace **Cancel** **Clear Field and Close**

Tip: To see all records, leave the search box empty.

- Contract Title
 - Type the contract title into this field.
 - The contract title should be a one sentence description of the contract.

Submit a Contract

Contract

Save **Cancel** **Contract Info** **Document** **Receivable Info** **Approvals** << >>

*Vendor Company:

*Contract Title:

- Record Type
 - Click the drop-down arrow, and choose one of the following options:
 - New Contract – a new contract.
 - Amendment – amending an active or expired contract.

Contract

Save Cancel Contract Info Document

*Vendor Company:

*Contract Title:

*Record Type: **New Contract** ▼

Fund & Budget Entity Information

*Account:

*Amendment:

- Financial & Budget Entity Information

Fund & Budget Entity Information

*Account:

*Fund Center Name:

*Budget Entity:

*Account Name:

*Account Department Code:

*Budget Entity Name:

- Account Number

- Type Fund number into the field and choose from the drop-down menu; OR

Fund & Budget Entity Information

*Account:

*Fund Center Name:

*Budget Entity:

Contract Information

- Click magnifying glass to search for account number.
- Select "Fund."
- Type in appropriate number, and click "Go."
 - (NOTE: If you use the U number to search, please select "All linked fields.")
- Click the radio button to select the appropriate fund number.
- Click "Import/Replace."

Look up Fund - Google Chrome

https://universityoftennessee.enterprisewizard.com/gui2/record/dao3_search.do;en;page=7C6E3EE17011E3

Search again: [Advanced Search](#) Create new -- Select

☐ String ☐ Context

Search in the Fund table and its subtables:

☒ Fund ☐ All text fields

☐ All linked fields

Funds

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page

Edit	ID ↓	Fund	Fund Name	Department Code	Department Name
<input type="radio"/>	169132	R011701082	Jeannette Payne Davis Graduate Fellowshi	U013417001	Admin-Education, Health & Human Sciences
<input type="radio"/>	169125	R010140003	Commission on Women STEM	U013840040	Sr VC Finance & Administration
<input type="radio"/>	169122	R181721377	CVM COE 2017 Hespel Start up 1/3	U180017020	Small animal clinical sciences
<input type="radio"/>	169121	R126110248	PHHS CDC Uthby Lung	U120051	Western Region

Page: [Page 1] [Next](#) [Last](#) Go to page

Tip: To see all records, leave the search box empty.

- Account Name, Funds Center Name, Account Department Code, Budget Entity, and Budget Entity Name will auto-populate.

Fund & Budget Entity Information			
*Account:	E170415	*Account Name:	Outside Counsel Fees
*Fund Center Name:	Patents and attorney fees	*Account Department Code:	U170004015
*Budget Entity:	17	*Budget Entity Name:	University-Wide Administration

- If you did not know the account number, you can search the following fields:
 - Account Name
 - Click the magnifying glass.
 - Click "Fund" and search by the fund number; OR
 - Click "Fund Name" and search by a word (ex: Treasurer).
 - Click the radio button to select the appropriate fund, and click "Import/Replace."
 - Account Name, Funds Center Name, Account Department Code, Budget Entity, and Budget Entity Name fields will auto-populate.

- Budget Entity
 - Click the magnifying glass.
 - Scroll down and click the radio button for the appropriate Budget Entity number.
 - Click “Import/Replace.”
 - The “Budget Entity Name” field will auto-populate.

Look up Budget Entity - Google Chrome

https://universityoftennessee.enterprisewizard.com/gui2/record/dao3_search.do;en;page=7C6E3EE17011E3C4D3EA

Search again: **GO** [Advanced Search](#) Create new -- Select --

☐ String ☐ Context

Search in the **Budget Entity** table and its subtables:

☒ Budget Code ☐ All linked fields

☐ Budget Entity ☐ All text fields

Import/Replace **Cancel** **Clear Field and Close**

Budget Entities

Budget Entities

Status: 21 record(s) found, 1 pages [Click for details...](#)

Edit	Budget Code	Budget Entity
<input type="radio"/>	20	Memorial Hospital
<input type="radio"/>	24	Family Practice-Memphis
<input type="radio"/>	23	Family Practice-Jackson
<input type="radio"/>	21	Family Practice-Knoxville
<input type="radio"/>	18	College of Veterinary Medicine
<input type="radio"/>	17	University-Wide Administration
<input type="radio"/>	15	County Tech Assist Service
<input type="radio"/>	14	Municipal Tech Advisory Svc
<input type="radio"/>	13	Institute for Public Service
<input type="radio"/>	12	UT Extension
<input type="radio"/>	11	Agricultural Experimnt Station
<input type="radio"/>	10	Memorial Research Center
<input type="radio"/>	09	Clinical ED Center-Chattanooga
<input type="radio"/>	08	Clinical ED Center-Knoxville
<input type="radio"/>	07	Memphis
<input type="radio"/>	05	Martin
<input type="radio"/>	04	Chattanooga
<input type="radio"/>	02	Space Institute
<input type="radio"/>	01	Knoxville

Import/Replace **Cancel** **Clear Field and Close**

- (Note: The Account number, Account Name, Funds Center Name, or Account Department Code do not auto-populate.)

- Budget Entity Name
 - Click the magnifying glass.

- Click “Budget Entity” and search by Budget Entity Name.
- Click the radio button next to the appropriate entity and code.
- Click “Import/Replace.”
- The “Budget Entity Number” and “Budget Entity Name” fields will auto-populate.
- (Note: The Account number, Account Name, Funds Center Name, or Account Department Code will not auto-populate.)

Search again: **GO** [Advanced Search](#) Create new -- Select --

☐ String ☐ Context

Search in the [Budget Entity](#) table and its subtables:

☒ Budget Entity ☐ All text fields

☐ All linked fields

Import/Replace **Cancel** **Clear Field and Close**

Budget Entities

Budget Entities

Status: 21 record(s) found, 1 pages [Click for details...](#)

Edit	Budget Code	Budget Entity
<input type="radio"/>	20	Memorial Hospital
<input type="radio"/>	24	Family Practice-Memphis
<input type="radio"/>	23	Family Practice-Jackson
<input type="radio"/>	21	Family Practice-Knoxville
<input type="radio"/>	18	College of Veterinary Medicine
<input type="radio"/>	17	University-Wide Administration
<input type="radio"/>	15	County Tech Assist Service
<input type="radio"/>	14	Municipal Tech Advisory Svc
<input type="radio"/>	13	Institute for Public Service
<input type="radio"/>	12	UT Extension
<input type="radio"/>	11	Agricultural Experimnt Station
<input type="radio"/>	10	Memorial Research Center
<input type="radio"/>	09	Clinical ED Center-Chattanooga
<input type="radio"/>	08	Clinical ED Center-Knoxville
<input type="radio"/>	07	Memphis
<input type="radio"/>	05	Martin
<input type="radio"/>	04	Chattanooga
<input type="radio"/>	02	Space Institute
<input type="radio"/>	01	Knoxville

Import/Replace **Cancel** **Clear Field and Close**

- Contract Information
 - Contract Description
 - A brief overview of the “Who, What, When, Where, Why, and How” of the contract
 - (Note: Please do not copy and paste contract the document into this field.)

Contract Information	
Contract Description:	<div style="border: 1px solid #ccc; height: 80px;"></div>

- Contract Category
 - Choose the appropriate contract category from the drop-down list.

*Contract Title:	<input type="text"/>
*Record Type:	<input type="text"/>
Fund & Budget Entity Info	
*Account:	<input type="text"/>
*Fund Center Name:	<input type="text"/>
*Budget Entity:	<input type="text"/>
Contract Information	
Contract Description:	<div style="border: 1px solid #ccc; height: 80px;"></div>
*Contract Category:	<div> <div>Affiliation/MOU/MOA</div> <div>Architectural Agreement</div> <div>Athletics Coach</div> <div>Athletics event</div> <div>Athletic Suite Season Tickets</div> <div>Business Associate Agreement (HIPAA)</div> <div>Certificate of Substantial Completion</div> <div>Confidentiality Agreement</div> <div>Construction (SBC Approved)</div> <div>Data Use Agreement</div> <div>Design (SBC approved)</div> <div>Equipment (purchase or lease)</div> <div>Hotel</div> <div>Inventor Basic Agreement</div> <div>Joint Faculty (Federal)</div> <div>Joint Faculty (State of TN)</div> <div>Lease (not SBC)</div> <div>Lease-State Bldg. Commission Approved</div> <div>Legal audit: fiscal acctg agreement</div> </div>
Encumbrance?:	Choose one ▼

- The contract categories are similar to contract categories in IRIS.
- New categories in the CM System:
 - Rental of UT Facilities.
 - World Travel Hotel.
 - UT Employee is Other Party.
- Contract Type
 - Choose the contract type from the drop-down list.

Contract Type: Choose one

*Foreign Contract?:

*Contract End Date:

Add Requester Info to Notification List

- The contract types are similar to contract types in IRIS.
- Differences between IRIS and the CM System:
 - Certain contract categories now default to specific payment types.
 - Ex: The “Hotel” contract category now defaults to payable.
- Encumbrance
 - Choose “Yes” to encumber funds.
 - Choose “No” to leave the fund unencumbered.

*Contract Category: Services performed by vendor

Encumbrance?: No

*Contract Start Date:

Notification Name(s):

Add Requester Info to Notification List

- Foreign Contract
 - Choose “Yes” if the contract is with between UT and foreign vendor.
 - Choose “No” if the contract is between UT and a domestic vendor.

Contract Type: Payable Contract

*Foreign Contract?: No

*Contract End Date:

Add Requester Info to Notification List

- Contract Start Date
 - Type in the contract start date; OR
 - Click the calendar icon, and select a date.

Encumbrance?: No

*Contract Start Date: 09/01/2016

Notification Name(s):

Financial Information

*Payable Amount: \$

*Competitive Type:

Notes

Payments – To be completed by Accounts Pa

Purchase Order Info – To be completed by purchasing

Calendar - Google Chrome

https://universityoftennessee.enterprise

Sep 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

EST Today

Apply Cancel

- Contract End Date
 - Type in the contract end date; OR
 - Click the calendar icon, and select a date.
 - (Note: The contract end date must be a date in time after the contract start date.)

*Foreign Contract?: No

*Contract End Date: 10/01/2016

Add Requester Info to Notification List

Calendar - Google Chrome

https://universityoftennessee.enterprise

Oct 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

EST Today

Apply Cancel

- Notification Names
 - This field includes the name of the person in SAP who is listed as an approver on the account.
 - To add yourself to the notification list, click the orange and white “Add Requester Info to Notification List.”

Notification Name(s):

James Maples 00115008

Test Portal

Add Requester Info to Notification List

- To add an additional name to workflow notifications:
 - Click the magnifying glass.
 - Select “Full Name” and “String.”

- Type the name in search field, and click “Go.”
- Click into the box to select the appropriate name.
- Click “Import/Append.”
- The name will appear in the notification names list.

Look up Person - Google Chrome

https://universityoftennessee.enterprisewizard.com/gui2/record/dao3_search.do;en;page=7C6E3EE17011E3C4D3EA

Search again: **GO** [Advanced Search](#) Create new -- Select --

☒ String ☐ Context

Search in the **Person** table and its subtables:

☒ Full Name ☐ All text fields

☐ All linked fields

Import/Replace **Import/Append** **Import/Search Again** **Cancel** **Clear Field and Close**

People

People

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page **Go**

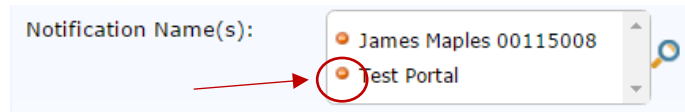
<input type="checkbox"/>	Edit	View	ID ↓	LDAP User ID	Full Name	Telephone	Group	Primary Team
<input type="checkbox"/>			80580	dgross4	David Gross 00353513	9014488788	Contract Creator Requester	Internal Employee Team
<input type="checkbox"/>			80579	nsummitt	Nancy Summitt 00352764	7318817482	Contract Creator Requester	Internal Employee Te
<input type="checkbox"/>			80578	jferris3	Jennifer Ferris 00353507		Contract Creator Requester	Internal Employee Te
<input type="checkbox"/>			80577	bcatala1	Blas Catalani 00353564	9014485988	Contract Creator Requester	Internal Employee Te
<input type="checkbox"/>			80576	svelamur	Sai Ramakrishna Velamuri Venkata 00353499	9014485253	Contract Creator Requester	Internal Employee Te
<input type="checkbox"/>			80575	trose14	Thomas Rose 00350544	8659745383	Contract Creator Requester	Internal Employee Te
<input type="checkbox"/>			80574	brobida	Brent Robida 00284157	8659746927	Contract Creator Requester	Internal Employee Te
<input type="checkbox"/>			80573	awilford	Allan Wilford 00306015	8659742414	Contract Creator Requester	Internal Employee Te
<input type="checkbox"/>			80572	cwatso36	Cayce Watson 00283317	6152561885	Contract Creator Requester	Internal Employee Te
<input type="checkbox"/>			80571	thayes7	Tracey Norrell 00254284	8659740399	Contract Creator Requester	Internal Employee Te
<input type="checkbox"/>			80570	rdunsmo1	Rachel Dunsmore 00245478		Contract Creator Requester	Internal Employee Te

Page: [Page 1] [Next](#) [Last](#) Go to page **Go**

Import/Replace **Import/Append** **Import/Search Again** **Cancel** **Clear Field and Close**

- To add multiple names, click “Import/Search Again,” and then follow the directions above to search for additional names.

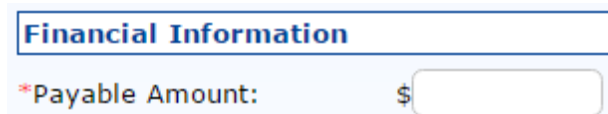
- To remove a name on the list, click the orange circle with the white minus sign to the left of the name.



- Financial Information

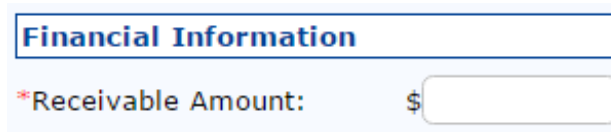
- Payable Amount

- If the contract type is “Payable,” type the payable amount in this field.



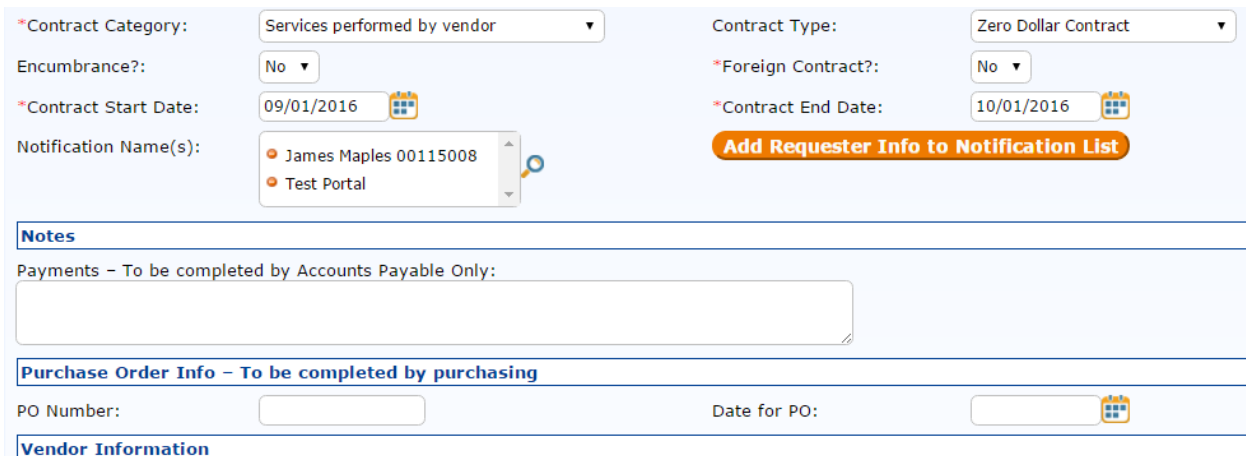
- Receivable Amount

- If the contract type is “Receivable,” type the receivable amount in this field.



- Zero-dollar

- If the contract type is “Zero-dollar,” you do not have to type an amount. The field is hidden.



- Payable & Receivable

- If the contract type is “Payable & Receivable,” type the payable amount in the payable amount field, and the receivable amount in the receivable amount field.

Financial Information	
*Payable Amount:	\$ <input type="text"/>
*Receivable Amount:	\$ <input type="text"/>

- Competitive Type
 - Choose “Bid” if the good or service was procured using the bid process.
 - Choose “No-Bid” if the good or service was not procured using the bid process.
 - (Note: No-bid is non-competitive, and this choice may result in an NCJ if the total payable amount is greater than, or equal to, \$10,000.)

Financial Information	
*Payable Amount:	\$ <input type="text"/>
*Competitive Type:	<div style="border: 1px solid black; padding: 2px;"> No Bid ▼ <div style="border: 1px solid black; padding: 2px; margin-top: 2px;"> Bid No Bid </div> </div>
Notes No-Bid Explanation: <input style="width: 100%;" type="text"/>	

- Notes
 - No-Bid Explanation
 - This is the simplified NCJ transaction.
 - Type the NCJ justification statement into this box.

Notes
No-Bid Explanation: Only required when competitive type equals No and the total amount is greater than or equal to \$10,000. <input style="width: 100%; height: 30px;" type="text"/>


- Payments – to be completed by Accounts Payable staff only.
 - You do not need to complete this field.

Payments – To be completed by Accounts Payable Only: <input style="width: 100%; height: 40px;" type="text"/>


- Payee named in Grant
 - If an NCJ is required, please choose “Yes” or “No”

Payee Named in Grant:	<div style="border: 1px solid black; padding: 2px;"> No ▼ <div style="border: 1px solid black; padding: 2px; margin-top: 2px;"> Choose one Yes No </div> </div>
Vendor Information *Vendor Number: <input style="width: 150px;" type="text"/>	






- Purchase Order Information – to be completed by Purchasing staff only. You do not need to complete this field.

Purchase Order Info – To be completed by purchasing	
PO Number:	<input type="text"/>
Date for PO:	<input type="text"/> 

- Vendor Information
 - Vendor Number - auto-populates from the vendor number above.

Vendor Information	
*Vendor Number:	<u>1100961</u> 

- Vendor Contact(s) – The CM system requires a vendor contact name and e-mail address.
 - You will see a name and e-mail address if there is a vendor contact person tied to the vendor number in the CM system.
 - You will see multiple names and e-mail address if there is more than one vendor contact person tied to the vendor number in the CM system.
 - (Note: Every name on the list will be notified via e-mail.)
 - To remove names from the list:
 - Click the check box to the left of the name that you want to remove from the list.
 - Click “Unlink.”

Vendor Information								
*Vendor Number:	<u>1016700</u> 							
*Vendor Contact(s):	Status: 1 record(s) found, 1 pages. Click here to re-count records.							
	<input type="checkbox"/>  Unlink <input type="checkbox"/>  Views							
<input type="checkbox"/>	Edit	View	ID ↓	LDAP User ID	Full Name	Telephone	Group	Primary Team
<input type="checkbox"/>			80549	Sabrina Heath <Sabrina.Heath@Hilton.com>	Sabrina Heath	865-970-4300		Vendor Team

- (Note: If there is no name and e-mail address listed, then there is no vendor contact person tied to the vendor number in the CM system.)

- New Vendor Contact
 - If no name and e-mail address is listed, you must add a vendor contact.
 - To add a new vendor contact, fill out the following fields:
 - “New Contact First Name.”
 - “New Contact Last Name.”
 - “New Contact Email.”
 - Select a “New Contract Role” from the drop-down list.
 - Click “Save Vendor Contact.”

New Vendor Contact

New Contact First Name:

New Contact Email:

New Contact Telephone:

Save Vendor Contact

Save and Go to Next Tab

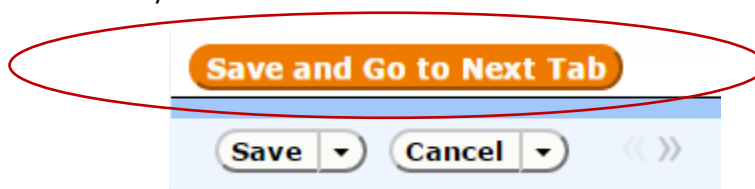
New Contact Last Name:

New Contact Role:

New Contact Fax:

Accounting
Other
Renewal
Sales

- Save and Go to Next Tab
 - Click **“Save and Go to Next Tab.”**
 - A CM system contract number (starting with 95) is created.
 - (Note: Clicking “Save” ends the contract entry session, and no record is saved.)
 - Please always remember to click **“Save and Go to Next Tab.”**



- Document Tab
 - Across the top of the page, you will see the header, which includes the ESM ID number, 95 contract number, and Status (DRAFT).

Contract

Edit Close **Contract Info Document Receivable Info Approvals** << >>

ID: 14809 Status: Draft

Contract Number: 9500003877

*Vendor Company: [2 DUDES BBQ](#)

*Contract Title: 2 Dudes BBQ Luncheon for Andy Holt Staff Members

Contract Requester: [Test Portal](#) IRIS (SAP) Contract Number:

- Your contract is in draft status, because it has not been submitted for review.
 - The “Contract Title” field is auto-populated from Contract Info tab.
 - Contract Document
 - This is where you will upload documents to route through workflow in conjunction with the contract data.

Contract Documents

Contract Documents:

Status: No records.

◦

Add New Document

Add Insurance Certificate

Add Tax Exemption

Save Cancel << >>

- (Note: You must have a document uploaded before you can submit the contract data for review.)
- To upload a new document:
 - Click “Add New Document.”
 - A new screen will open.

Contract Document

Save Cancel Document Information << >>

*Title:



Document Information

*Document Type: Choose one ▾

Attach Documents

*Attach Contract Document: [Attach/Manage](#)
 Drag&Drop files

Contract Information

Contract ID: 14980  Contract Title: 

Contract Competitive Type: Contract Contract Category:

Contract Start Date: Contract End Date:

Contract Requester: Contract Vendor Company:

Contract Description:

Save Cancel << >>

- Type in the title of the document that you uploaded.

Contract Document

Save Cancel Document Information << >>

*Title:

- Choose the document type:
 - Contract;
 - Other;
 - Amendment; or
 - Final Contract.

Contract Document

Save Cancel Document Information << >>

*Title:

Document Information

*Document Type: Choose one

Attach Documents

*Attach Contract Document:

Choose one

- Contract
- Other
- Amendment
- Final Contract

- Attach the Contract Document
 - Click "Attach/Manage."

Attach Documents

*Attach Contract Document: [Attach/Manage](#)

Drag&Drop files

- A New Screen opens.

Attachments Finish Cancel

Attachments: 0 Files Total Size: 0 Bytes

Local source

Attach File(s)

External source

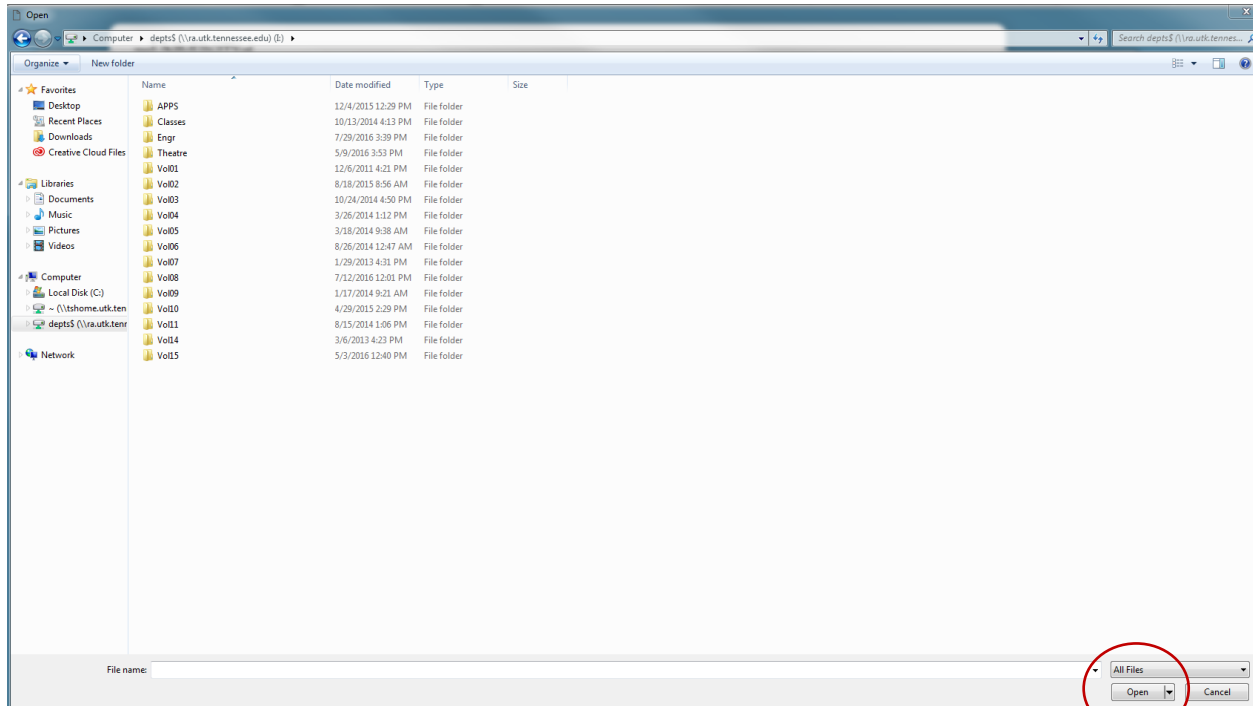
Google New Document New Spreadsheet New Presentation

Attach Existing Doc/S/P Upload Local File

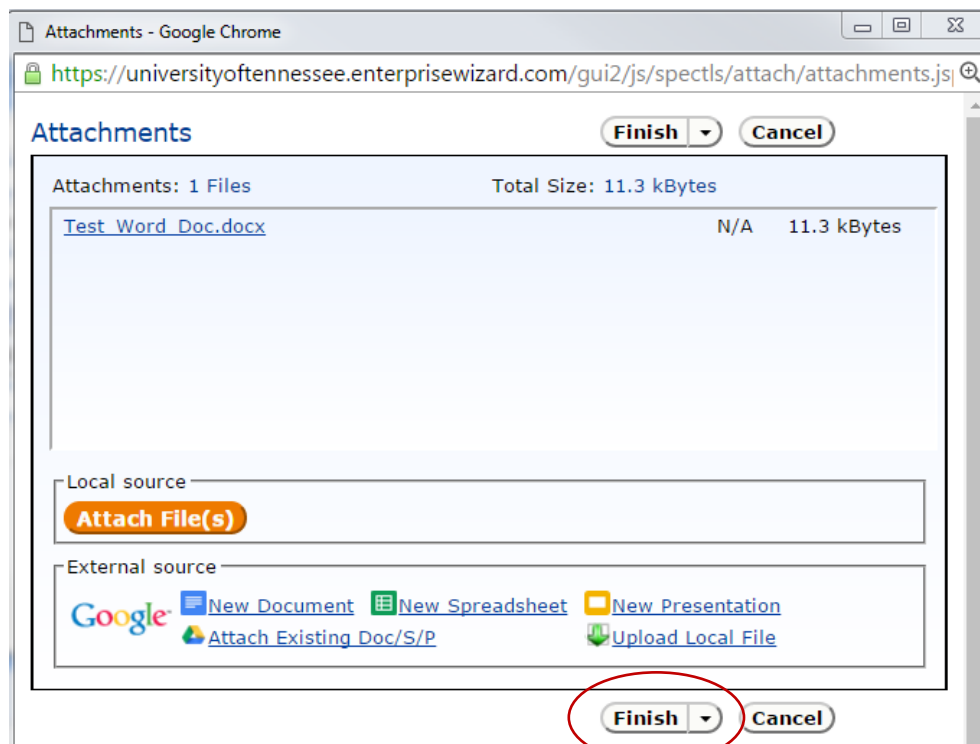
Finish Cancel

- Click the orange and white "Attach Files" button.

- Select the document from your computer and click “Open.”



- Click “Finish”;



Attach Documents

*Attach Contract Document:

[Attach/Manage](#)

1. [Test Word Doc.docx](#)

- You can also drag and drop a file from your computer.
 - Find the document on your computer.
 - Drag it on to the screen.
 - Hover the document image over “Drag&Drop Files” until the rectangle turns red.

Contract Document

[Save](#) [Cancel](#) [Document Information](#) << >>

*Title:

Document Information

*Document Type:

Attach Documents

*Attach Contract Document:

[Attach/Manage](#)

1. [Test Word Doc.docx](#)

[+ Copy](#)

Contract Information

Contract ID:

Contract Title:

Contract Competitive Type:

- The attached documents are now listed.

Attach Documents

*Attach Contract Document:

[Attach/Manage](#)

1. [Test Word Doc.docx](#)

- Click “Save.”

Contract Information

Contract ID:

14980

Contract Competitive Type:

Contract Start Date:

Contract Requester:

Contract Description:

Save

Cancel

<<

>>

- Add Insurance Certificate
 - This form is pre-loaded in the CM system.
 - Click on “Add Insurance Certificate.”

Add Insurance Certificate

- Add Tax Exemption
 - This form is pre-loaded in the CM system.
 - Click on “Add Certificate of Tax Exemption.”

Add Tax Exemption

- Related Amendments
 - All related amendments will be listed here.

Related Amendments															
Amendments:															
Status: 7 record(s) found, 1 pages. Click here to re-count records.															
	Edit	ID	Contract Number	Contract Title	Contract Start Date	Contract End Date	Contract Category	Vendor Company	Status	Contract Requester	Payable Amount	Receivable Amount	Original Contract Cumulative Payable Amount	Original Contract Cumulative Receivable Amount	Budget Entity
<input type="checkbox"/>		18147	9500006888	MALLORY CONSULTING, LLC- CAMERON SMOAK -...	06/25/2016	06/24/2017	Services performed by...	CAMERON MALLORY...	Active	Noreen Gadzekpo...	\$0	\$0	\$145,000	\$0	18
<input type="checkbox"/>		18106	9500006867	MALLORY CONSULTING, LLC- CAMERON SMOAK -...	06/25/2015	06/24/2016	Services performed by...	CAMERON MALLORY...	Expired	Noreen Gadzekpo...	\$0	\$0	\$145,000	\$0	18
<input type="checkbox"/>		18057	9500006818	MALLORY CONSULTING, LLC- CAMERON SMOAK -...	01/01/2014	01/31/2015	Services performed by...	CAMERON MALLORY...	Expired	Noreen Gadzekpo...	\$0	\$0	\$145,000	\$0	18
<input type="checkbox"/>		18025	9500006786	MALLORY CONSULTING, LLC- CAMERON SMOAK -...	01/01/2013	01/31/2014	Services performed by...	CAMERON MALLORY...	Expired	Noreen Gadzekpo...	\$0	\$0	\$145,000	\$0	18
<input type="checkbox"/>		18013	9500006774	CAMERON SMOAK - INSTRUCTOR SERVICES FOR...	10/01/2012	09/30/2013	Services performed by...	CAMERON M SMOAK	Expired	Noreen Gadzekpo...	\$25,000	\$0	\$145,000	\$0	18
<input type="checkbox"/>		17981	9500006742	CAMERON SMOAK - INSTRUCTOR SERVICES FOR...	10/01/2011	09/30/2012	Services performed by...	CAMERON M SMOAK	Expired	Meredith York...	\$75,000	\$0	\$145,000	\$0	18
<input type="checkbox"/>		17973	9500006734	CAMERON SMOAK - INSTRUCTOR SERVICES FOR...	03/01/2010	09/30/2011	Services performed by...	CAMERON M SMOAK	Expired	Meredith York...	\$20,000	\$0	\$145,000	\$0	18

- Click “Save and Go to Next Tab”

Save and Go to Next Tab

- Receivable Info Tab
 - Across the top of the page, you will see the header, which includes the ESM ID number, 95 contract number, and Status.

Contract

Edit Close Contract Info Document Receivable Info Approvals << >>

ID: 14809 Status: Draft

Contract Number: 9500003877

*Vendor Company: [2 DUDES BBQ](#)

*Contract Title: 2 Dudes BBQ Luncheon for Andy Holt Staff Members

Contract Requester: [Test Portal](#) IRIS (SAP) Contract Number:

- Receivable Information
 - The receivable account number auto-populates from the “Contract Info” tab.
 - The remainder of the fields are optional.
 - (Note: Please check to make sure the receivable account number is correct, and make changes, if necessary.)

Receivable Information

*UT Receiving Account(s): Status: 1 record(s) found, 1 pages. Click [here](#) to re-count records.

Unlink

<input type="checkbox"/>	Edit	ID ↓	Fund	Fund Name	Department Code	Department Name
<input type="checkbox"/>		45837	e013148	Test fund name change	U013972026	NIMBIOS-Natl Inst for Math & Biol Synth

Description Of Services:

Billing Start Date:

Billing End Date:

G/L Account:

Attention To:

Billing Frequency: Choose one ▼

Billing Rate: \$

Maximum Amount of Billin

Invoice Format: Choose one ▼

Source of Invoice: Choose one ▼

Amount of Invoice If Recurring:

- Billing Department Contact Information
 - Please fill in the name of the billing contact person.

Billing Department Contact Information

UT Billing Department Person Full Name:

UT Billing Department Person ID:

UT Billing Department Person Email:

UT Billing Department Person Telephone:

- Click the magnifying glass and search by “Full name.”
- Type the name into the search field, and click “Go.”
- Click the radio button to select the appropriate name.
- Click “Import/Replace.”

Look up Person - Google Chrome

https://universityoftennessee.enterprisewizard.com/gui2/record/dad3_search.do;en;page=10BC3F5C5B3F81

Search again: **GO** [Advanced Search](#) Create new -- Select --

☐ String ☐ Context

Search in the **Person** table and its subtables:

☒ Full Name ☐ All text fields

☐ All linked fields

Import/Replace **Cancel** **Clear Field and Close**

People

People

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page **Go**

	Edit	View	ID	LDAP User ID	Full Name	Telephone	Group	Primary Team
<input type="radio"/>			80167	lgilber8	Larsen Gilbert 00352763	8659741255	Contract Creator Requester	Internal Employment Team
<input type="radio"/>			80166	cdailey5	Carson Dailey 00352762	8659746365	Contract Creator Requester	Internal Employment Team
<input type="radio"/>			80165	cjenki32	Charles Jenkins 00352757	8659741255	Contract Creator Requester	Internal Employment Team

Page: [Page 1] [Next](#) [Last](#) Go to page **Go**

Import/Replace **Cancel** **Clear Field and Close**

Tip: To see all records, leave the search box empty.

- The “UT Billing Department Person ID,” the “UT Billing Department Person Telephone” fields will auto-populate.

Billing Department Contact Information			
UT Billing Department Person Full Name:	Larsen Gilbert 00352763	UT Billing Department Person ID:	80167
UT Billing Department Person Email:		UT Billing Department Person Telephone:	8659741255

- Vendor Bill to Address
 - Auto-populated from the vendor company record.
 - (Note: Please check to see if this information is correct, and make changes, if necessary.)

Vendor Bill To Address			
Vendor Bill To Street Address 1:	<input type="text" value="2510 HIGHWAY 11 NORTH"/>	Vendor Bill To Street Address 2:	<input type="text"/>
Vendor Bill To PO Box Address:	<input type="text"/>	Vendor Bill To PO Box City:	<input type="text"/>
Vendor Bill To City:	<input type="text" value="SWEETWATER"/>	Vendor Bill To State or Province:	<input type="text" value="TN"/>
Save and Go to Next Tab		Vendor Bill To Country:	<input type="text"/>
		Vendor Bill To PO Box Zip Code:	<input type="text"/>
		Vendor Bill To Zip or Postal Code:	<input type="text"/>

- Press “Save and Go to Next Tab”

Save and Go to Next Tab

- Approvals Tab
 - Across the top of the page, you will see the header, which includes the ESM ID number, 95 contract number, and Status.

The screenshot shows the top of the 'Contract' page with the 'Approvals' tab selected. A red box highlights the header information: ID: 14809, Contract Number: 9500003877, and Status: Draft. A red arrow points to the 'Approvals' tab label.

Contract ID: 14809 Status: Draft

Contract Number: 9500003877

*Vendor Company: [2 DUDES BBQ](#)

*Contract Title: 2 Dudes BBQ Luncheon for Andy Holt Staff Members

Contract Requester: [Test Portal](#) IRIS (SAP) Contract Number:

- Approval notes.
 - This field is similar to the “Comments” field in SAP.
 - Most often, this field will remain blank.

The screenshot shows the 'Approval Information' section. The 'Approval Notes' field is a large text area. Below it, there is an orange 'Edit' button circled in red, followed by radio buttons for 'HTML' (selected) and 'plain text'.

Approval Information

Approval Notes:

Edit ☒ HTML ☐ plain text

- To edit and add text to this field, click the orange “Edit” button.
 - A new window will pop-up.

The screenshot shows a pop-up window titled 'HTML Editor - Google Chrome'. It has a toolbar with various formatting options and a large text area for editing. A red arrow points to the text area. The 'Finish' button at the bottom right is circled in red.

HTML Editor - Google Chrome

<https://universityoftennessee.enterprisewizard.com/gui2/do/htmleditor1;en;page=1>

Finish Cancel

Context #0

HTML Source HTML

Finish Cancel

- Click your cursor into the white space, and type your text into the notepad.
- Click “Finish.”
- The text will appear in the “Approval Notes” field.

Approval Information

Approval Notes:

Edit ☒ HTML ☐ plain text

- Approvals Needed and Number of Approvals Needed
 - These fields will be populated once the contract data is “In Review.”
 - The “Approvals Needed” lists the workflow steps for your contract.

Approvals Needed:

Status: 2 record(s) found, 1 pages. Click [here](#) to re-count records.

<input type="checkbox"/>	Edit	View	ID	Approval Status	Approval Title	Approver(s)	Step Number ↑	Contract ID	Contract Title
<input type="checkbox"/>			48	Pending Approval	Department Approval	Sharon Thompson 00208408 Sheri Pugh 00242485	1	18167	Robert J. Silver-C Support
<input type="checkbox"/>			49	Queued	University System Contract Office Review/Approval	Casey Carrigan 00228662	5	18167	Robert J. Silver-C

- The “Number of Approvals Needed” is a counter that shows the number of workflow steps needed for approval, and the number of workflow steps that have been completed.

Number of Approvals
Needed:

2

Number of Approvals
Received:

0

- Click “Submit for Review” to submit the contract data, NCJ justification (if applicable), and contract documents into workflow.

Submit for Review

How to Check on the Status of Your Contract

- On the home page, click on the “My Contracts” icon.



My Contracts

View your previously submitted contracts

- How to find your contract.
 - There are two ways to search:
 - (1) Saved Searches.
 - Search similar to a “Google” or internet search.
 - Type in descriptive words for your search.
 - Click “Go.”



User: portal | Logout

Home

Saved Searches: Show all records

Text: bbq

GO

- The search results will feature all contracts in the system with the word “BBQ.”

Saved Searches: Show all records

Text: bbq

GO

Contracts

Status: 67 record(s) found, 3 pages [Click for details...](#)

<input type="checkbox"/>	Edit	ID ↓	Contract Number	Contract Title	Contract End Date	Vendor Company	Status	Contract Requester	Account	Account Name	Budget Entity
<input type="checkbox"/>		14978	9500003967	Testing UCO	08/16/2016	WEST ALLEY BBQ	Submitted for Review	Test Portal	E170145040	Treasurer- Contracts	17
<input type="checkbox"/>		14977	9500003966	Test A/P	08/17/2017	WEST ALLEY BBQ	Active	Test Portal	E170145040	Treasurer- Contracts	17
<input type="checkbox"/>		14972	9500003962	Testing Active and PO	08/13/2016	WEST ALLEY BBQ	Expired	Whitney Clark 00343298	E170145040	Treasurer- Contracts	17
<input type="checkbox"/>		14971	9500003961	Amendment to BBQ to add dessert	09/01/2017	WEST ALLEY BBQ	Draft	Rosemary Webb 00137863	E170145040	Treasurer- Contracts	17
<input type="checkbox"/>		14969	9500003960	Amendment to add dessert	09/01/2016	SLICK PIG BBQ	Submitted for Review	Lisa Thomas 00313515	E170145040	Treasurer- Contracts	17
<input type="checkbox"/>		14966	9500003955	To add dessert for \$200	09/01/2017	HANGIN' HOG BBQ	Submitted for Review	Eric Seiber 00331733	E170145040	Treasurer- Contracts	17

- (2) Search Bar.

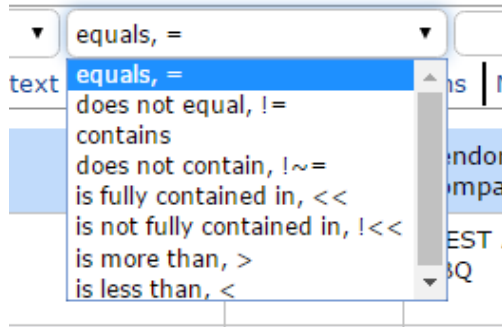
Search: contains

- Choose the field within which you will search.
 - Click the inverted triangle to access the drop-down list.
 - Select the correct field from the list.
 - Examples of some searches that you can run:
 - Search based on "Account" number
 - Search based on "Contract Title"
 - Search based on "IRIS (SAP) Contract Number"
 - Search based on "Requestor LDAP User ID"
 - Search based on "Vendor Company"
 - Search based on "Vendor Name"

Search: contains

Account
Account Department Code
Account Name
Amendment Number
Amount of Invoice If Recurring
Approval Notes
Approval Notification Recipient(s)
Attention To:
Billing End Date
Billing Frequency
Billing Rate
Billing Start Date
Budget Entity
Budget Entity ID
Budget Entity Name
Campus Contract Officer
Campus Contract Officer ID
Campus Contract Officer Teams
Get Details for Andy Holt Staff Members

- Choose the operator that you will use to search
 - Click the inverted triangle to access the drop-down list.
 - Most frequently used operators:
 - "equals, ="
 - This will search for an exact match.
 - "contains"
 - Highlight the operator.



- Enter the text or numbers for which you are searching.



- Click “Go” to perform the search.

Contracts
Status: 1 record(s) found, 1 pages [Click for details...](#)

Search:	Vendor Company	contains	Dell	GO
Show All	<input type="checkbox"/> Refine	<input type="checkbox"/> String	<input type="checkbox"/> Context	<input type="checkbox"/> Active Only
More Options My Contracts				

	Edit	ID ↓	Contract Number	Contract Title	Contract End Date	Vendor Company	Status	Contract Requester	Account	Account Name	Budget Entity
<input type="checkbox"/>		5828	9500000250	Master Agreement with Dell Corporation	03/31/2015	DELL MARKETING LP	Expired	Beth Hall 00243727	E170145040	Treasurer-Contracts	17

- (Note: You can search all contracts in the system through the “My contracts” icon.)
- Actions:
 - Click the “Edit” icon (page and pencil) if your contract is in “Draft” status, and you need to make changes.

<input type="checkbox"/>	Edit	ID ↓	Contract Number	Contract Title	Contract End Date	Vendor Company
<input type="checkbox"/>		18167	9500006901	Robert J. Silver-Consulting and Instructional Support	07/31/2017	ROBERT J. SILVER

- After making changes, you can submit via the “Approvals” tab.
- Click the Contract ID number:

<input type="checkbox"/>	Edit	ID ↓	Contract Number	Contract Title	Contract End Date	Vendor Company
<input type="checkbox"/>		18167	9500006901	Robert J. Silver-Consulting and Instructional Support	07/31/2017	ROBERT J. SILVER

- Options:
 - Look up contract information and/or workflow status.
 - Workflow:
 - Click on “Approvals tab.”

- List of approvers and relevant approval information.

Approval Information

Approval Notes:

Approvals Needed:

Status: 2 record(s) found, 1 pages. Click [here](#) to re-count records.

<input type="checkbox"/>	Edit	View	ID	Approval Status	Approval Title	Approver(s)	Step Number ↑	Contract ID	Contract Title
<input type="checkbox"/>			23	Approved	Department Approval	Sherry Sims 00114633 Janice Hodge 00142717...	1	18163	UT CFO AIRPORT INTERVIEWS
<input type="checkbox"/>			24	Pending Approval	University System Contract Office Review/Approval	Casey Carrigan 00228662	5	18163	UT CFO AIRPORT IN

Number of Approvals Needed:

2

Number of Approvals Received:

1

- Copy Existing Record.
 - This function is used to copy the contract data.
 - How to copy
 - Search for the contract that you would like to copy, using the steps outlined above.
 - Click on either the “ID” number, or the “Contract Title.”

Contract

Close
Contract Info
Document
Receivable Info
Approvals
<< >>

ID:	18163	Status:	Active
Contract Number:	9500006900		
*Vendor Company:	HILTON KNOXVILLE AIRPORT		
*Contract Title:	UT CFO AIRPORT INTERVIEWS		
Contract Requester:	Bonnie Frank 00242678	IRIS (SAP) Contract Number:	
*Record Type:	New Contract		

Copy Existing Record

- Click the “Copy Existing Record” button.
- A new window will open.
 - The following fields are auto-populated:
 - Vendor, Record Type, Account Number, Account Name, Fund Center Name, Account Department Code, Budget Entity, Budget Entity Name, Contract Category,

Encumbrance, and Foreign Contract.

Contract

[Save](#) [Cancel](#) [Contract Info](#) [Document](#) [Receivable Info](#) [Approvals](#) [«](#) [»](#)

*Vendor Company: [WEST ALLEY BBQ](#)

*Contract Title:

*Record Type: [New Contract](#)

Fund & Budget Entity Information

*Account: [E170145040](#) *Account Name: [Treasurer- Contracts](#)

*Fund Center Name: [Treasurer](#) *Account Department Code: [U170007045](#)

*Budget Entity: [17](#) *Budget Entity Name: [University-Wide Administration](#)

Contract Information

Contract Description:

*Contract Category: [Hotel](#) Contract Type:

Encumbrance?: [No](#) *Foreign Contract?: [No](#)

*Contract Start Date: *Contract End Date:

Notification Name(s): [Add Requester Info to Notification List](#)

Notes

Payments – To be completed by Accounts Payable Only:

Purchase Order Info – To be completed by purchasing

PO Number: Date for PO:

Vendor Information

*Vendor Number: [1131411](#)

- (Note: The copy function is helpful if you are using the same vendor for multiple agreements.)
- Create Amendment
 - All amendments are linked to original contract.
 - You cannot amend an amendment.
 - You must pull up the original contract to see all linked amendments.
 - Search for the original contract under “My Contracts” or “All Contracts.”
 - Click the “ID Number”; OR
 - Click the “Contract Title”
 - Click the orange “Create Amendment” button.

Contract

Close Contract Info Document Receivable Info Approvals << >>

ID: 14977 Status: Active

Contract Number: 9500003966

*Vendor Company: [WEST ALLEY BBO](#)

*Contract Title: Test A/P

Contract Requester: [Test Portal](#) IRIS (SAP) Contract Number: 85142941558

*Record Type: New Contract

Copy Existing Record Create Amendment

- A new window will open.
 - The following fields are auto-populated:
 - Vendor, Record Type, Original Contract ID, Original Contract Title, and Original Contract Number, Account Number, Account Name, Fund Center Name, Account Department Code, Budget Entity, Budget Entity Name, Contract Description, Contract Category, Contract Type, Encumbrance, and Foreign Contract, Notification Names, Competitive Type, and Vendor Contact.

Contract

Save Cancel Contract Info Document Receivable Info Approvals << >>

*Vendor Company: [WEST ALLEY BBO](#)

*Contract Title:

*Record Type: Amendment

Amendment Information

*Original Contract ID: [14977](#) *Original Contract Title: [Test A/P](#) *Original Contract Number: [9500003966](#)

Fund & Budget Entity Information

*Account: [E170145040](#) *Account Name: [Treasurer- Contracts](#)

*Fund Center Name: [Treasurer](#) *Account Department Code: [U170007045](#)

*Budget Entity: [17](#) *Budget Entity Name: [University-Wide Administration](#)

Contract Information

Contract Description: Testing A/P role

*Contract Category: Hotel Contract Type: Payable Contract

Encumbrance?: No *Foreign Contract?: No

*Contract Start Date: *Contract End Date:

Notification Name(s): Add Requester Info to Notification List

Financial Information

*Payable Amount: \$ Original Contract Cumulative Payable Amount: \$7,000

*Competitive Type: No Bid

- (Note: There is now a cumulative payable amount field showing the payable amount from the original contract plus all related amendments.)

Where Does the Contract Data Go after Submittal?

- It electronically routes to the campus contract office folder for a delegation decision and assignment to a campus and/or university contract officer.
- If information is incorrect or missing, the contract will be sent back to you for changes, and it will reappear in your “My Contracts” tab as a “Draft.”
 - You can then make changes, save, and resubmit for review and approval.
- For additional workflow questions, please see the workflow chart below.

