

Texas A&M System Offices – Contract Management: End User Documentation

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Confidential

Laserfiche®

Document Revision Log

The following describes the version history and timeline of this design document.

Version	Date	Description of Change	Author
1.0	8.29.2016	Creation	Joe Murphy

Contents

Document Revision Log	2
1.0 End User Documentation Overview and Notes	4
2.0 Initiating a Process in Forms	5
3.0 New Contract Process	6
3.1 Contract Request Submission	6
3.2 High Level Approval.....	9
3.3 Review / Revision or Drafting by Contracting Officer	11
3.4 Review by OGC	14
3.4.1 Review by OGC – Assign an Attorney.....	14
3.4.2 Review by OGC – Create File in Legal Files	14
3.4.3 Review by OGC – Attorney Review and Revision	15
3.5 Review / Revision of OGC Comments	16
3.6 Review by Director of Procurement.....	16
3.7 Company Review for Signature	17
3.8 Internal Review for Signature	19
4.0 Supplemental Processes	21
4.1 Contract Management – Initiate Contract Business Process.....	21
4.2 Contract Management – Contract Search.....	23
4.3 Contract Management – Contract Termination.....	24
4.4 Contract Management – Contract Renewal	25
4.5 Contract Management – Evidence of Insurance Coverage Review	27

1.0 End User Documentation Overview and Notes

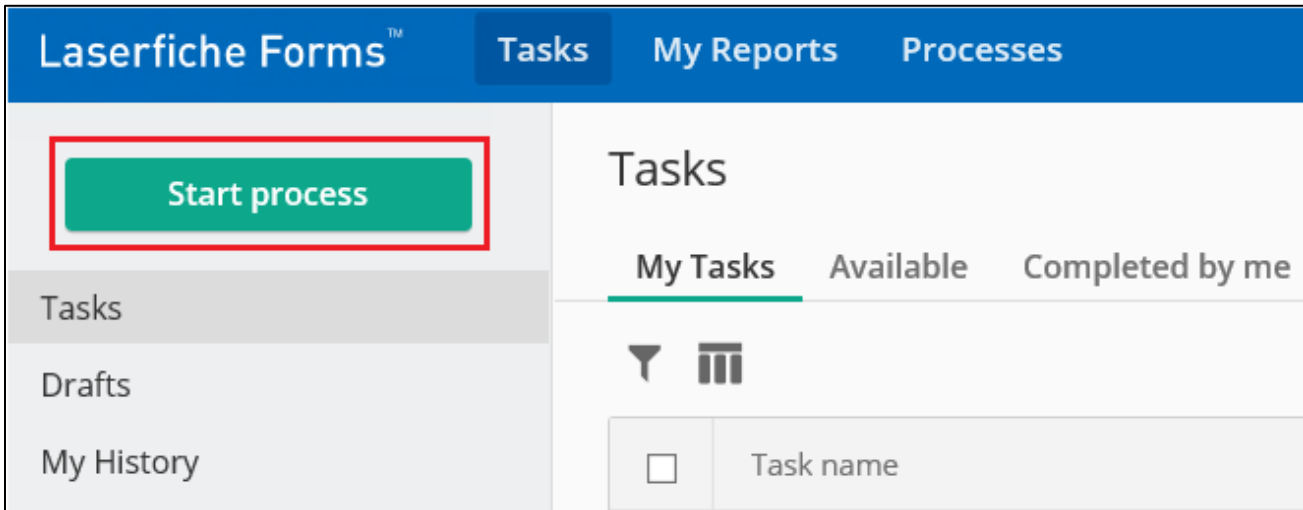
This document describes the various contract management processes built or customized as part of this project. There are screenshots to go along with nearly every step to help describe the process to users.

The document is laid out in the order that steps will be accomplished. Use the table below to find which steps refer to you.

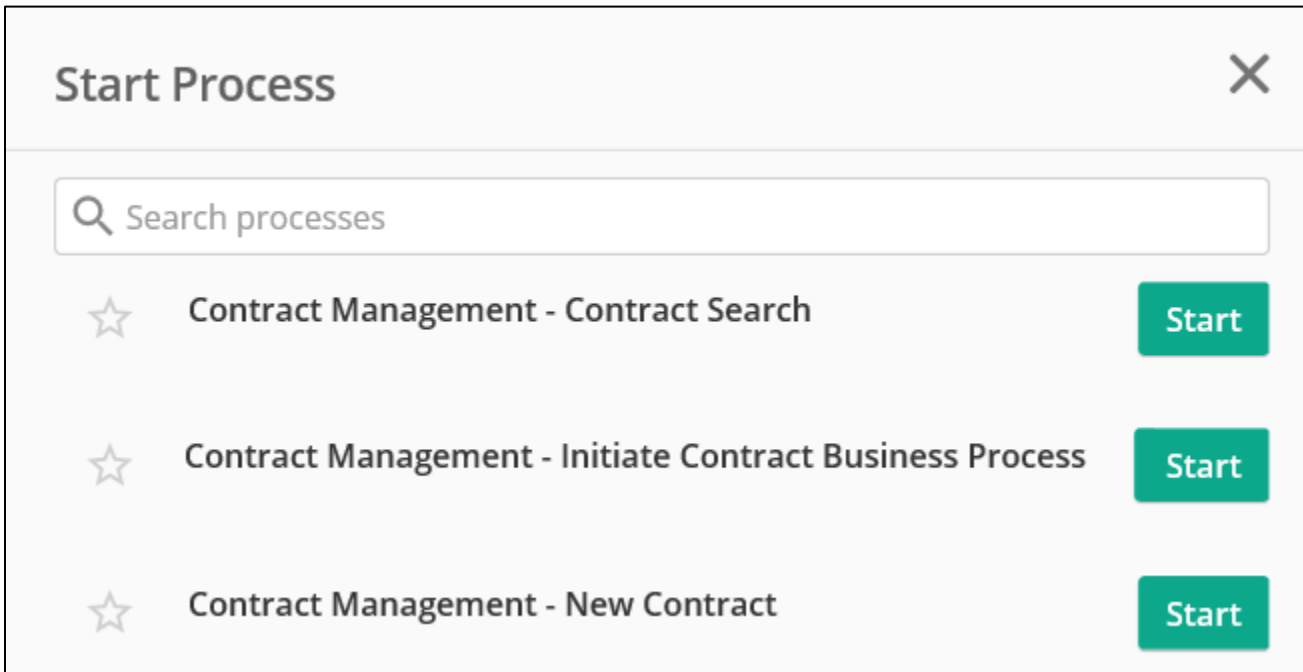
Section	Step Name	Applicable User
2.0	Initiating a Process in Forms	Anyone who will be initiating a CMS process, including: the employee seeking to have the contract enacted, the applicable department head, or a contracting officer
3.1	Contract Request Submission	Same as Section 2.0, “Initiating a Process in Forms”
3.2	High Level Approval	TAMUS: SOBA TAMUK and PVAMU: applicable department head
3.3	Review / Revision or Drafting by Contracting Officer	Contracting officer (for TAMUK, this individual is referred to as the buyer)
3.4.1	Review by OGC – Assign an Attorney	Routing admin
3.4.2	Review by OGC – Create File in Legal Files	Legal Files handler
3.4.3	Review by OGC – Attorney Review and Revision	Attorney selected in Section 3.4.1, “Review by OGC – Assign an Attorney”
3.5	Review / Revision of OGC Comments	Contracting officer
3.6	Review by Director of Procurement	Director of Procurement (PD)
3.7	Company Review for Signature	Contracting officer
3.8	Internal Review for Signature	Varies depending on value and TAMUS entity. TAMUS: <ul style="list-style-type: none"> • Value < \$10k: department head or PD • Value < \$100k and Value > \$10k: PD only • Value > \$100k: CFO TAMUK: <ul style="list-style-type: none"> • Value < \$100k: contract admin or PD • Value > \$100k: PD or CFO PVAMU: <ul style="list-style-type: none"> • Value < \$100k: PD • Value > \$100k: CFO
4.1	Initiate Contract Business Process	Contracting officer
4.2	Contract Search	Contracting officer
4.3	Contract Termination	Contracting officer to initiate, PD to approve
4.4	Contract Renewal	Contracting officer
4.5	Evidence of Insurance Coverage Review	Contracting officer to initiate, PD to approve

2.0 Initiating a Process in Forms

To initiate a process in Forms, log into Laserfiche Forms at <https://it-lf-cmsweb.tamu.edu/forms>. Click **Start process** at the top left of the webpage:



This brings up a new window:



Clicking the **Start** button next to one of the processes will initiate that process.

3.0 New Contract Process

To open the initial form for this process, follow the steps shown above, selecting the **Start** button next to “Contract Management – New Contract”.

Every form has the option for users to leave **Comments** that will appear to users later in the process as well as in the email to the user assigned to the next task.

The forms in the screenshots are shown filled with sample information. In many cases, the forms were broken up by section to condense the document.

Contract Request Submission

Initiate the **New Contract** process by filling out the fields on the form. At a minimum, all fields that are marked required with a red asterisk (*) must be filled. The phone numbers must be formatted like real phone numbers and the email addresses like real email addresses.

Notes: This form will look slightly different depending on the TAMU Entity selected in the first step.

If the **Department Head/Designee** information is filled incorrectly, please contact the Procurement Department to let them know to update this information.

Contract Management

New Contract Request

THE TEXAS A&M UNIVERSITY SYSTEM

Please fill out the following form to begin the contract request process.

[Link to TAMUS Contract Review Guidelines and Checklist](#)

TAMUS Entity *

TAMU System Offices

Information about Applicable Company/Entity

Company/Entity *	Company Contact Name/Title *
Laserfiche	Joe Murphy/Solutions Engineer
Company Contact Email *	Company Contact Phone Number (xxx-xxx-xxxx) *
JMurphy@example.com	123-456-7890
Company Address *	
(Street Address, City, State and Zip Code)	
123 Sample St., Long Beach, California 90807	

Filling the **Contract Execution Deadline** field with a valid date automatically fills the **Days Until Deadline** field.

Contract Information	
Contract Title * Sample Contract LF/TAMUS	Type * Services
Has this contract been through the Procurement Department? * <input checked="" type="radio"/> Yes <input type="radio"/> No	
Effective Date * 8/26/2016	Expiration Date * 8/25/2017
Contract Execution Deadline * 8/18/2017	Days Until Deadline 365
Number of Possible Renewals 2	
Description of Contract * This is a sample contract used for demonstration	

If the **Total Value of Contract** is not known, enter an estimated value, keeping in mind that the internal signers may change as a result of going above or below the \$100,000 threshold.

Financial Information	
Total Value of Contract * (?) \$ 300000	Value in First Fiscal Year of Contract (?) \$ 100000
Funding Source * (?) 12663	Requisition Number 8311a

Note: the field names that are followed by a “(?)” have tooltips associated. These tooltips give more information about the field.

Filling **Requested by or on Behalf of (Department)** automatically fills the **Department Head/Designee** field.

TAMUS Department and Contact Information

<p>Requested by or on Behalf of (TAMUS Department) *</p> <input style="width: 90%;" type="text" value="OFFICE OF ACADEMIC AFFAIRS"/>	<p>Department Head/Designee (?) Auto Filled by Lookup</p>
<p>Responsible Party (Contract Administrator) * (?)</p> <input style="width: 90%;" type="text" value="Wade Wynn"/>	<p>Responsible Party's Title</p> <input style="width: 90%;" type="text" value="Project Manager"/>
<p>Responsible Party's Email Address *</p> <input style="width: 90%;" type="text" value="WWynn@example.com"/>	<p>Responsible Party's Phone Number (xxx-xxx-xxxx) *</p> <input style="width: 90%;" type="text" value="987-654-3210"/>
<p>Requester *</p> <input style="width: 90%;" type="text" value="Murphy, Joseph"/>	

Selecting different values for **Please select one of the following** will make minor changes to this or a later form. Relevant to this step, selecting “I will not be providing a contract” will hide the field to upload a contract.

Uploads

Please select one of the following: *

<p>Contract *</p> <p style="color: blue;">First Draft of Cont... 1.95KB ×</p>	<p>Supplemental Documents</p> <div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-bottom: 10px;">Upload</div> <p style="color: blue;">Supp Contract Inf... 11.47KB ×</p>
--	---

Submit

Save as Draft

If the submitter would like to save the form and return to it at a later time, click **Save as Draft**.

Clicking **Submit** sends the contract request to the high level approver to make them aware of the contract and allow them to verify sufficient funds are available in the **Funding Source** listed above. After this point, the contract will be handled mainly by the contracting officer until it is approved and executed.

High Level Approval

After the request for a new contract has been initiated, the “high level approver” must acknowledge awareness of the contract and verify sufficient funds are available and allocated for the contract. This is the department head for the initiated contract (auto-filled in the previous step) for TAMUK and PVAMU and SOBA for TAMUS.

A lot of the key information given in the previous step is shown as read-only information on this form to simplify the high level review.

Please verify sufficient funds are available for this contract.			
Link to TAMUS Contract Review Guidelines and Checklist			
Renewal	Number of Possible Renewals		
No	2		
Company/Entity	Contract Title		
Laserfiche	Sample Contract LF/TAMUS		
Type	Services		
Effective Date	Expiration Date		
8/26/2016	8/25/2017		
Contract Execution Deadline	Days Until Deadline		
08/18/2017	365		
Total Value of Contract (?)	Value in First Fiscal Year of Contract (?)		
\$ 300000	\$ 100000		
Funding Source	1736a		
Description of Contract			
This is a sample contract used for demonstration			
Requester			
Murphy, Joseph			
Contract		Supplemental Documents	
First Draft of Contract - Init.docx	1.95KB	Supp Contract Info.docx	11.47KB

Review the information, then **Submit** the form (with **Comments**, if desired), or **Terminate New Contract** process if there is an issue.

Submitting the form is the high level approver's approval to begin the process. At that point, any documents uploaded in the first stage of this process are saved to the repository in a folder created specifically for this contract. That folder is given metadata matching the fields filled out on the first form.

Alternately, if the high level approver does not approve the new contract process beginning, he or she can **Terminate Contract Process**.




Review / Revision or Drafting by Contracting Officer

The **Contract Information** section shown below contains a lot of the same information as was shown in the previous step, except that many of the fields are editable. Any field value with a box around it indicates that it can be edited by the contracting officer. Any changes made to these fields will change the corresponding field on the contract folder’s template.

A request for a contract has been submitted. Please ensure that an initial draft has been received or composed.

Link to [TAMUS Contract Review Guidelines and Checklist](#)

Contract Information

Company/Entity Laserfiche	Contract Title Sample Contract LF/TAMUS
Type Services	
Renewal No	Number of Possible Renewals * <input type="text" value="2"/>
Effective Date * <input type="text" value="8/26/2016"/> 	Expiration Date * <input type="text" value="8/25/2017"/> 
Contract Execution Deadline * <input type="text" value="08/18/2017"/> 	Days Until Deadline 365
Total Value of Contract * (?) \$ <input type="text" value="300000"/>	Value in First Fiscal Year of Contract (?) \$ <input type="text" value="100000"/>
Funding Source * <input type="text" value="1736a"/>	
Has This Contract Been through the Procurement Department? <input checked="" type="radio"/> Yes <input type="radio"/> No	
Description of Contract * <input type="text" value="This is a sample contract used for demonstration"/>	
Requester Murphy, Joseph	

The below checklist helps to ensure certain actions are taken by the contracting officer. As the instructions state, all items must be checked before submitting the form. You can select all at once by clicking “Check All”.

Steps to General Contract Evaluation and Processing

Check the boxes below after the accompanying task has been completed. All boxes must be checked before the process can continue:

- (a) Review the list of contracts requiring special handling, in Section E of the attached Checklist, these contract types require following additional System polices or regulations.
- (b) Review the proposed contract to determine if issues outlined in Section B of the Checklist, General Contract Approvals and Requirements Guidelines, will be present and adequately addressed.
- (c) Read the proposed contract and note any contractual provisions that need to be added, revised, or deleted in compliance with Sections B and C of the attached Checklist.
- (d) Using Section D of the attached Checklist, determine if the proposed contract will need to be reviewed and approved by OGC.
- Check All

The checklist questions shown below are intended to remind the contracting officer of the situations in which OGC review is not required. Note that these questions are hidden if the **Total Value of the Contract** was listed as less than \$100,000 in the initiation step because OGC review is not required for those contracts.

If the **Total Value** is less than \$100,000 or any of the checkboxes are checked, then the read-only question **Is OGC review required?** Is set to “No”, and the second question appears. Selecting “Yes” for that question will send the contract to OGC for review. Selecting “No” will not.

If the **Total Value** is greater than \$100,000 and none of the boxes are checked, then **Is OGC review required?** Is set to “Yes” and cannot be changed, and the second question is hidden. The contract will be sent to OGC upon submission.

OGC Review Questions

Click to check any box that is applicable to this contract:

- OGC review and approval is not required for those contracts and agreements entered into pursuant to a materially unaltered contract form or template approved by OGC within the preceding three years.
- Interagency and intra-system agreements entered into pursuant to System Regulation 25.07.06 are not required to be reviewed and approved by OGC.
- Sponsored research contracts, cooperative agreements, and grants entered into with an agency of the United States government that contain standard clauses and provisions common to such contracts, cooperative agreements, and grants do not require OGC review and approval.

Is OGC review required?

Yes No

Would you like to send to OGC for review? *

Yes No

If the value selected in the first step of this process for **Please select one of the following** is “I will not be providing a contract”, then the **Upload New Contract** is required because a contract must exist to complete this step. If a contract *was* provided in the first step, then the contracting officer can elect to upload a new version if they would like to make any edits.

Upload Fields

Link to Contract Folder <https://lt-tweb.tamu.edu/laserfiche/index.aspx?db=TEST-CMS#id=710;view=browse>

Link to Contract <https://lt-tweb.tamu.edu/laserfiche/ElectronicFile.aspx?db=TEST-CMS&id=711>

Please select one of the following:

The contracting company provided a contract.

<p>Upload New Contract</p> <p>Draft by Contracti... 2.01KB ×</p>	<p>Supplemental Documents</p> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-bottom: 5px;">Upload</div> <p>Supp Contract Inf... 11.47KB</p> <p>2-Supp Info.docx 11.47KB ×</p>
--	--

You can add notes that will be shown at later steps in this process and eventually added to a document stored in the repository upon completion of the **New Contract** process. To do that, click the blue **Add** at the bottom of that section, correct the **Date** if necessary then write in the **Notes** field.

Contract Notes

Date ×

Notes

I reviewed the contract and made a few minor changes.

[Add](#)

Clicking the **Approval/Review** button will either send the contract to OGC or the Director of Procurement for review, depending on answers to the questions above.

Terminate Contract Process will end the process.

Send Back For Approval will send the contract to the high level approver to review any changes that may have been made; this would mainly be used if the **Total Value** or one of the other editable fields at the top of the form were changed dramatically.

Review by OGC

The OGC review process involves three sub-steps, described below.

3.4.1 Review by OGC – Assign an Attorney

The top of the form shows the same read-only information about the contract as in the **High Level Approval** step. It also shows the **Contract Notes** left in the last step, if applicable.

<p>Link to Contract Folder https://lt-tweb.tamu.edu/laserfiche/index.aspx?db=TEST-CMS#id=710;view=browse</p> <p>Link to Contract https://lt-tweb.tamu.edu/laserfiche/ElectronicFile.aspx?db=TEST-CMS&id=711</p>
<p>Contract Notes</p> <hr/> <p>Date 08/19/2016</p> <p>Notes I reviewed the contract and made a few minor changes.</p>

The only field that needs to be filled out to complete this step is the **Assign an Attorney** drop-down field.

<p>Assign an Attorney *</p> <input type="text" value=""/>
--

The only button option available at this step is **Submit**.

3.4.2 Review by OGC – Create File in Legal Files

This form shows all the same information as the **Review by OGC – Assign an Attorney** step.

The actual actions associated with this step are performed outside of Laserfiche in a program called Legal Files. All that has to be done in Laserfiche Forms is to fill in the field **Legal Files Number**.

<p>Legal Files Number *</p> <input type="text" value="2016-0082454"/>
--

Again, the only button option available at this step is **Submit**.

3.4.3 Review by OGC – Attorney Review and Revision

This form shows all the same information as the **Review by OGC – Assign an Attorney** step. The **Contract Notes** from previous submissions are shown, however the Attorney has the option to add more. To add notes, click the blue **Add** at the bottom of that section, correct the **Date** if necessary then write in the **Notes** field.

Contract Notes

Date
08/19/2016

Notes
I reviewed the contract and made a few minor changes.

Date ✕

Notes

[Add](#)

The attorney reviewing the contract has the option to upload a new version of the contract if they made changes or comments in the document. These changes (or requested changes) should make the document legally sufficient and therefore the Attorney must click “Agree” to the question shown below. If the contract did not need to be modified, the Attorney can select “No” to the first question, but still must affirm that the document is legally sufficient before submitting.

Will you be uploading a new version of the contract? *

Yes No

Upload New Contract *

OGC Reviewed Contract.docx 1.93KB ✕

The contract is legally sufficient or will be legally sufficient after the requested changes are made: *

Agree

Again, the only button option available at this step is **Submit**.

Review / Revision of OGC Comments

This step does not appear if the contract was not sent through OGC for review. If OGC review is not requested, then the process goes straight from the **Review / Revision or Drafting by Contracting Officer** step (Section 3.3) to the **Review by Director of Procurement** (Section 3.6).

This step closely matches the **Review / Revision or Drafting by Contracting Officer** step (Section 3.3); the informational fields are the same and the same fields are modifiable. The questions regarding OGC review are hidden because they have already been answered.

Instead, a field now exists to allow the contracting officer to decide whether to **Send Back for Review** or not; if “Yes” is selected, the contracting officer decides whether to return the form to OGC review (perhaps with a new contract containing changes requested by OGC) or to the high level approver (if the **Total Value** or one of the other editable fields at the top of the form were changed dramatically).

<p>Send Back for Review? *</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>OGC Review or High Level Approver? *</p> <p><input checked="" type="radio"/> OGC Review <input type="radio"/> High Level Approver</p>
--

Clicking **Approval/Review** will send the form to the Director of Procurement for review. To select this option, the **Send Back for Review?** Field must be set to “No”.

Clicking **Terminate Contract Process** will end the process.

Send for Review will send the contract for review by either the high level approver or OGC, depending on who was selected above.

Review by Director of Procurement

The **Review by Director of Procurement** will be a quick check to ensure that the Director approves the contract. This step will not require the Director’s signature, and it will not have a field to upload a new version of the contract. The Director can, however, upload **Supplemental Documents** if desired.

Supplemental Documents	
<input type="button" value="Upload"/>	
Supp Contract Info.docx	11.47KB
2-Supp Info.docx	11.47KB

Contract Notes left at earlier steps of this process are shown as read-only on this form.

Contract Notes
Date 8/19/2016
Notes I reviewed the contract and made a few minor changes.
Date 8/19/2016
Notes I've left comments in the document for the Contracting Officer to make a few of the remaining changes.

The Director of Procurement has the options to **Approve** the contract, agreeing that it is ready to be signed, **Terminate Contract Process**, or **Send for Revision** (to the contracting officer).

Company Review for Signature

The section for contract information at this step is the same as in the **Contract Review / Revision or Drafting by Contracting Officer** step.

Also like that step, the **Company Review for Signature** has a checklist that helps to ensure certain actions are taken by the contracting officer, who is assigned this task on behalf of the contracting company. Both items must be checked in order to submit the form with **External Review Approved**.

Steps to General Contract Evaluation and Processing
Check the boxes below after the accompanying task has been completed. All boxes must be checked before the process can continue:
<input checked="" type="checkbox"/> (a) Contact the other party to discuss and resolve any issues.
<input checked="" type="checkbox"/> (b) Revise the proposed contract to conform the terms and conditions to the results of the final negotiations.

If the contracting company signed the contract, select “Yes” for the field **Did the contracting company sign the contract?** That will reveal the other fields shown below. Upload the signed contract and, if applicable, any **External Supplemental Documents** (such as a non-disclosure agreement). To add more than one **External Signatory**, click the blue Add at the bottom of that section.

Uploads

Did the contracting company sign the contract? *

Yes No

Externally Signed Contract *

Company Signed... 2.76KB ×

External Supplemental Documents

Ext Supp Contrac... 11.47KB ×

External Signatories

Name * ×

Name * ×

[Add](#)

If the contract was not signed but the contracting company supplied a new version of the contract to be reviewed, and that new version has significant enough changes to warrant review by OGC or the high level approver, select “Yes” to the question that appeared and upload the new contract, then click **Send for Revision**.

Uploads

Did the contracting company sign the contract? *

Yes No

Did the contracting company supply a new or different version of the contract that needs to be sent back for further internal revision? *

Yes No

Upload New Version *

Supplemental Documents

Supp Contract Info.docx 11.47KB

2-Supp Info.docx 11.47KB

The **Contract Notes** from previous submissions appear, with the option to add more. To add notes, click the blue **Add** at the bottom of that section, correct the **Date** if necessary then write the notes in **Notes**.

Date ✕



Notes

The signed PDF is attached, please print and countersign

[Add](#)

Before submitting the contract, ensure that all of the editable fields in the Contract Information section are correct; after submitting this form, those values will be locked.

The contracting officer, acting on behalf of the contracting company, has the option to select **External Review Approved** if the checklist items are all checked, the contract is signed and uploaded, and at least one **External Signatory** is given.


If the contract was not signed, you can elect to send the contract back for review and revision to produce a document that contracting company will sign (**Send for Revision**) or if an agreement could not be made, you can select **Terminate Contract Process**.

Internal Review for Signature

The contract has been signed by the contracting company and is ready to be countersigned and fully executed. The section containing the Contract Information is read-only because these values should not change after the contract has already been signed.

The **Contract Notes** from previous submissions appear, with the option to add more. To add notes, click the blue **Add** at the bottom of that section, correct the **Date** if necessary then write the notes in **Notes**.

Date ✕



Notes

Contract has been countersigned

[Add](#)

If the internal approver(s) do not approve the contract, select “No” for **Did you countersign the contract?** This will hide the **Signatories** fields as well as the upload fields.

Selecting “Yes” will reveal those fields (shown below). Enter at least one **Internal Signatory**, clicking the blue “Add” to add more signatories, if necessary. Print and sign the company-signed contract then upload the fully executed contract in the field provided, along with any **Supplemental Documents**, if desired. The **Execution Date** defaults to today’s date; correct that date if it was signed on a different day.

Did you countersign the contract? *

Yes No

External Signatories	Internal Signatories
<p>Name Jeff H</p>	<p>Name * ×</p> <input style="width: 90%;" type="text" value="Jay C"/>
<p>Name Hedy B</p>	<p>Name * ×</p> <input style="width: 90%;" type="text" value="John G"/>
	<p>Add</p>

<p>Executed Contract Upload *</p> <div style="border: 1px solid #ccc; width: 100%; height: 30px; background-color: #f0f0f0; display: flex; align-items: center; justify-content: center;"> Upload </div>	<p>Supplemental Documents</p> <div style="border: 1px solid #ccc; width: 100%; height: 30px; background-color: #f0f0f0; display: flex; align-items: center; justify-content: center;"> Upload </div> <ul style="list-style-type: none"> <li style="margin-bottom: 5px;">Ext Supp Contract... 11.47KB <li style="margin-bottom: 5px;">4-Supp Info - Copy... 11.47KB ×
---	--

Execution Date *

☰

Here, the internal approver(s) have the option to sign the contract and select **Approved**, or not to sign the contract and either **Send for Revision** or **Terminate Contract Process**.

4.0 Supplemental Processes

To kick off one of the processes below, follow the steps shown in Section 2.0, selecting the **Start** button next to one of the two starter processes described below.

Every form has the option for users to leave **Comments** that will appear to users later in the process as well as in the email to the user assigned to the next task.

The forms in the screenshots are shown filled with sample information. In many cases, the forms were broken up by section to condense the document.

Contract Management – Initiate Contract Business Process

This process can be triggered by a member of the Procurement Department, or anyone that handles contracting officer duties. Follow the steps in Section 2 to start the process. This process is designed to support the other supplemental processes, i.e., **Contract Renewal**, **Contract Termination**, and **Evidence of Insurance Coverage**. Those processes need to have a contract to act on in order to initiate, which is the purpose of this process.

The starting form is very simple and only contains one field, **Contract ID**. Enter a valid **Contract ID**, which can be found at the beginning of a contract folder's title or in its metadata.

The screenshot shows a web form titled "Contract Management" and "Initiate Contract Business Process" with the Texas A&M University System logo. The form contains a text input field for "Contract ID" with the value "710" and a "Submit" button. The instruction reads: "Please enter the Contract ID (Entry ID of the Contract Folder) to begin."

Contract Management	THE TEXAS A&M UNIVERSITY SYSTEM
Initiate Contract Business Process	
Please enter the Contract ID (Entry ID of the Contract Folder) to begin.	
Contract ID *	<input type="text" value="710"/>
<input type="button" value="Submit"/>	

If a contract is found, read-only information about that contract similar to several steps in the New Contract process (e.g., the **High Level Approver** step) is given along with a link to the contract folder.

Select the contract business process to run on a particular contract.

Contract ID	Company/Entity
710	Laserfiche
Contract Title	Type
Sample Contract LF/TAMUS	Services
Effective Date	Expiration Date
8/26/2016	8/25/2017
Number of Possible Renewals	
2	
Description	
This is a sample contract used for demonstration	
Link to Contract https://lt-tweb.tamu.edu/laserfiche/index.aspx?db=TEST-CMS#id=710;view=browse	

Below the information fields is a radio button field for the user to either renew, give evidence of insurance coverage, or terminate the contract in question.

Business Process to Invoke

Renew

Evidence of Insurance Coverage

Terminate

Select which process to initiate, then click **Initiate Contract Business Process**. If the wrong contract was pulled up or anything else went wrong, users can click **Cancel** to end the process and remove the task from their inbox.

The process selected for the contract selected will appear in the user’s task list in Forms.

Contract Management – Contract Search

This process can be triggered by the same individuals that can trigger the **Initiate Contract Business Process**, and it serves the same purpose – to kick off one of the other supplemental processes. The difference is that **Initiate Contract Business Process** is strictly to trigger a process on one specific contract, whereas **Contract Search** can trigger any of the processes on multiple contracts at the same time. This is especially useful if, for example, you wanted to quickly find all contracts set to expire in the next month, and initiate the **Contract Renewal** process on all of them simultaneously.

The starting form is again very simple, it only requires the user to choose their **TAMUS Entity** and specify the criteria on which they would like to search.

Contract Management
THE TEXAS A&M
UNIVERSITY SYSTEM

Contract Search

Please select how you would like to search for the contract and provide the necessary search criteria.

TAMUS Entity *

TAMU System Offices
▼

Search For *

All Contracts

Expiring Contracts

By Status

By Renewal Status

Evidence of Insurance Expiration Date

By Title

By Company

Selecting certain search criteria will reveal new fields to help the user complete the search. For example, if the user selects “Expiring Contracts” in the field **Search For**, the following appears:

By Expiration (Renewal)

Searches between the start date and end date for contract status executed

Expiration Start Date *

8/22/2016

Expiration End Date *

9/22/2016

Clicking **Search** brings up a **Search Results** form. Information about the contracts is given in a table, along with a field for **Action** (the column furthest to the right in the table). The options are the same three available in the **Initiate Contract Business Process**: Terminate, Evidence of Insurance, and Renew (or “None”, which doesn’t start a process for that contract).

Search Results							
ID	Company/Entity	Title	Status	Renewals	Effective Date	Expiration Date	Action* (?)
710	Laserfiche	Sample Contract LF/TAMUS	Executed	2	8/26/2016	8/25/2017	None ▾
651	Goat Farms Inc	Milk Supply	Executed	4	9/1/2016	8/31/2017	None ▾

Select the business process you would like to run on one or on multiple contracts then click **Submit**. If the results do not show any contracts on which you would like to take an action, click **Cancel** to end the process without initiating any processes.

Contract Management – Contract Termination

To initiate this process, run either the **Contract Search** or **Initiate Contract Business Process**, described in Sections 4.1 and 4.2. Running one of those processes adds the **Contract Termination** process to the Forms task list for the user that triggered the termination.

The contract information section is the same as what is shown in the **Initiate Contract Business Process**.

The initiator must give the **Termination Reason**, to be approved by the Director of Procurement.

Termination Initiated	Murphy, Joseph
By	
Termination Reason*	Mutual agreement to break contract

If the user clicks **Submit Termination Request**, the contract is sent to the Procurement Director for approval of termination. This form is identical to the first one in the process. The **Termination Reason** left by the initiator of the process is shown, and can be updated/changed by the Procurement Director.

Termination Initiated	Murphy, Joseph
By	
Termination Reason*	Mutual agreement to cancel contract. Original SOW outdated.




Click **Approve Termination** to terminate the contract, or **Reject Termination** to end the process without terminating the contract.

Contract Management – Contract Renewal

Like **Contract Termination**, this process is initiated by either the **Contract Search** or **Initiate Contract Business Process**, described in Sections 4.1 and 4.2. Running one of those processes adds the **Contract Renewal** process to the Forms task list for the user that triggered the renewal.

The contract information section is the same as what is shown in the **Initiate Contract Business Process**.

The form appears with certain fields auto-populated. The **Effective Date** shown is set to one day after the original **Expiration Date** given on the original contract. The **Expiration Date** is set to the same amount of time past the **Effective Date** as it was on the original contract. Fill in the **Deadline** and **Value in this Fiscal Year**.

New Contract	
Effective Date* (?)	Expiration Date* (?)
8/26/2018 	8/25/2019 
Deadline*	Days Until Deadline
5/19/2017 	266
Total Value of Contract*	Value in this Fiscal Year
\$ 300000	\$ 100000
Description of Contract*	
This is a sample contract used for demonstration	
Requester*	
Murphy, Joseph	

The user can end the renewal process and keep the contract from renewing by clicking **Do Not Renew**.

If the user would like to renew the contract, they can move forward by clicking **Begin Renewal Process**. Doing that kicks off the **New Contract** Process, starting at the High Level Approver step since the information from the original starting form is already known. The forms are all a little bit different than the original **New Contract** process in several ways.

First, the contract information section has slightly different fields. The **Renewal** field now says “Yes” instead of “No”. The **Number of Possible Renewals** has been reduced by one since the renewal was initiated. There used to be a field for **Value in First Fiscal Year**; that field is now called **Value in This Fiscal Year**.

Renewal Yes	Number of Possible Renewals 1
Company/Entity Laserfiche	Contract Title Sample Contract LF/TAMUS
Type Services	
Effective Date 8/26/2018	Expiration Date 8/25/2019
Contract Execution Deadline 05/19/2017	Days Until Deadline 266
Total Value of Contract (?) \$ 300000	Value in this Fiscal Year \$ 100000
Funding Source 1736a	
Description of Contract This is a sample contract used for demonstration	

Additionally, there is a new section for **Previous Contracts** at the bottom of the forms.

Previous Contracts				
ID	Title	Status	Effective Date	Expiration Date
739	Sample Contract LF/TAMUS	Executed	8/26/2017	8/25/2018

From this point, the renewal follows the **New Contract** process. When the process is completed, the contract folder’s metadata will be updated to reflect that, and the original contract will be moved to a subfolder inside the contract folder.

Contract Management – Evidence of Insurance Coverage Review

Like **Contract Termination** and **Contract Renewal**, this process is initiated by either the **Contract Search** or **Initiate Contract Business Process**, described in Sections 4.1 and 4.2. Running one of those processes adds the **Contract Evidence of Insurance Coverage Review** process to the Forms task list for the user that triggered the initial process.

The contract information section is the same as what is shown in the **Initiate Contract Business Process**.

A field asks **Is Evidence of Insurance Coverage necessary for this contract?** If it is necessary, select “Yes” and the following fields will appear:

Is Evidence of Insurance Coverage necessary for this contract? *

Yes ▾

Evidence of Insurance Coverage

Insurance Document *	Insurance Coverage Effective Date *	Insurance Coverage Expiration Date *
Insurance Doc - Auto.pdf	2.76KB 8/26/2016	8/26/2017
Insurance Doc - Workplace.pdf	2.76KB 9/1/2016	3/1/2017
<input type="button" value="Upload"/>	<input type="text"/>	<input type="text"/>

[Add](#)

Upload an **Insurance Document** and give the **Insurance Coverage Effective** and **Expiration Dates**. To add multiple insurance documents, click the blue “Add” button. Rows can be removed by clicking the X to the right of the row. Click **Submit**.

The evidence of insurance is sent to the Procurement Director for approval. This form is identical to the first one in the process except that the fields shown above are read-only.

Evidence of Insurance Coverage			
Insurance Document		Insurance Coverage Effective Date	Insurance Coverage Expiration Date
Insurance Doc - Auto.pdf	2.76KB	8/26/2016	8/26/2017
Insurance Doc - Workplace.pdf	2.76KB	9/1/2016	3/1/2017
Reviewed By		Date Reviewed	
		Date captured on form submission	

The Procurement Director can decide that the **Evidence of Insurance Coverage** (is) **Not Applicable**, which would terminate the process. Clicking **Needs More Info** sends the form back to the initiator. Clicking **Approve** completes the process, saving the insurance documents to the contract folder and updating the metadata on the folder.