# End User Guide

**For contract creators using the end user interface*

# For Saint Louis University

Last Updated: November 9, 2022

# Contents

# Overview

This document describes how to use the contract management functionality for Agiloft contract creators using the end user interface shown below (not the standard power user interface).

# Login

If you are already signed into that system, clicking the link to the CMS will automatically log you in.

# Getting Help

To access Agiloft's generic help and tutorials, please visit
https://www.agiloft.com/tutorials.htm

For SLU CMS documentation and resources, please visit
https://www.slu.edu/busfin/departments/business-services/contract-management-system

For help using the SLU CMS, please email agiloftsupport@slu.edu.

# Viewing a contract

Hover over View tab to display contracts you've submitted (View My Contracts) or all contracts you're permitted to see (View All Contracts). Only contracts you have permission to access will be displayed.

In the list of available contracts, click on any of the column titles to sort by the column.

A list of saved searches is available in the dropdown at the top to filter the contracts. You can

## Common Area

### Record Type

This field defines the parent/child relationship between contracts. If anything other than the master agreement is selected, a Parent Contract ID field becomes visible. Selecting a parent contract will create a relationship between this record and the parent record. Once the parent contract ID is selected, it is displayed as a hyperlink you can click on directly to access the parent contract.

Most of the time you will be selecting Contract.

### Is this contract confidential?

Normally, CMS users can see contracts within their own Departv2.5 (rl22-6.37.002 Tc 0.s56 (epe ( dir)-0se0r 15.8(-

If you find that no Contract Type is available for a Contract Category, that Contract Type is

## Contract Information

### When is this contract effective?

You can choose and enter a specific date or specify "Date of Last Signature." If you choose "Specific Date," the system will automatically calculate the Contract End Date based on the Contract Effective Date and Contract Term (- 1 day).

If you choose "Date of Last Signature" and DocuSign will handle the signing process, the contract's Effective Date and End Date will be inserted and calculated automatically.

### Renewal Type

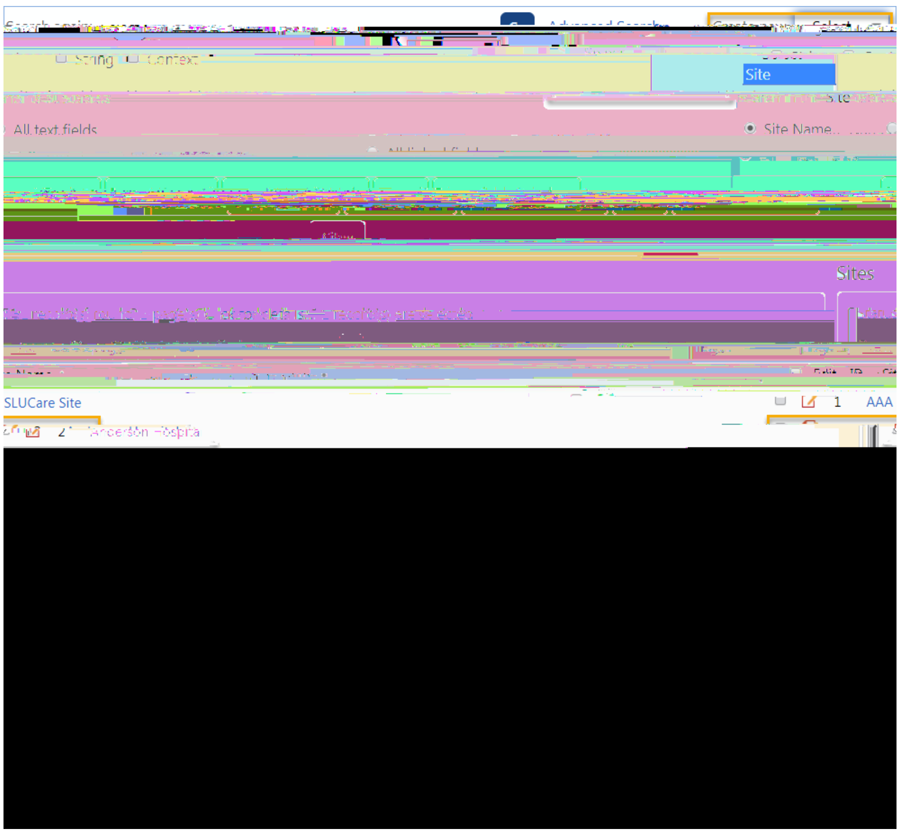
- Notify Staff to Renew
  - A notification is triggered at 30, 60, and 90 days before the Contract End Date, requesting for the Contract Manager and Responsible Party to follow up and review whether the contract should be renewed or not.
- Auto-Renewing
  - A notification is triggered at 30, 60, and 90 days before the Contract End Date, requesting for the Contract Manager and Responsible Party to follow up and review whether the contract should be renewed or not.
  - If an additional review

- Evergreen
    - Evergreen contracts never expire, so the Contract Term in Months disappears when selected.
- One time contract
    - One-time contracts do not renew, so it expires after the Contract End Date.

## Site/Sites

This field is required for some Contract Types. Click the lookup icon to see the list of sites. Check the box to the left of the site and click Import/Append.

If you can't find the site you need after searching, you can create a new site by using the Create new > Site tool in the upper right.




## General Notes

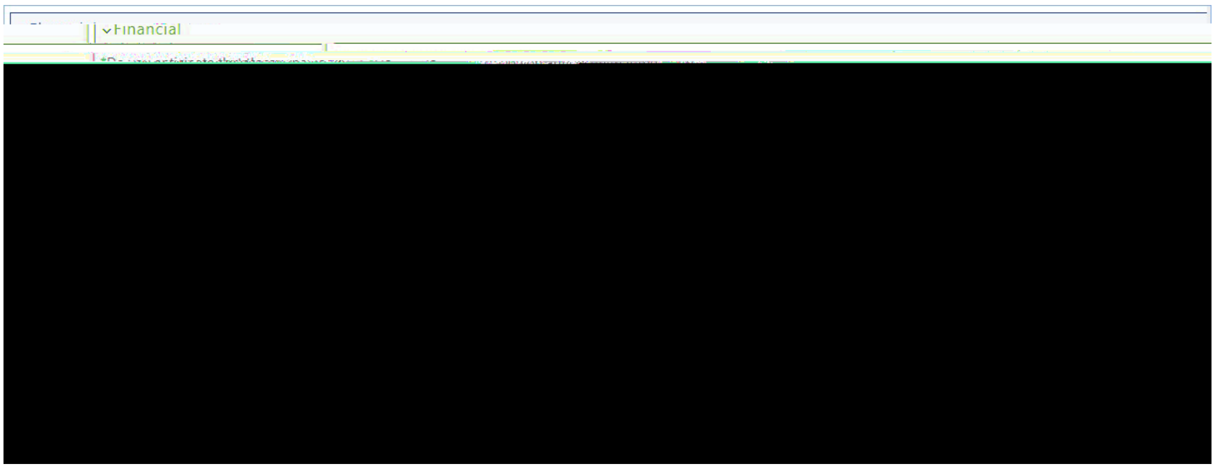
This field works like a conversation window, where after entering a comment and saving the record, it creates a comment entry below with the user information supplied with a time stamp:

## Company Contact Entry

Choose an existing primary contact for this contract if one exists or select New Contact and enter the information.

## Financial

Enter the financial details of the contract. Depending on responses to these questions, more fields may become visible. If the contract type is defined as one that needs to be sent to Unimarket when the University will be paying the company or individual, the system will handle that export automatically at signing.




If the contract is the result of a competitive bid process and the anticipated cost is $5000 or greater, use the File Upload tool to attach the bids for reference.

# Compliance Questions

Answer all questions that appear in the Financial Compliance, International Compliance, Info Sec and HIPPA Compliance, Legal and Risk Management, ITS (for certain contract types), and MARCOM sections. Your responses here determine any additional approvals required for this request and will route the contract forward appropriately.

If you still have questions, please reach out to the person referenced in the title portion of the section:

## File Upload

Use this section to specify where the actual contract document is coming from, and to attach additional files (like competitive bids, discussed earlier) for the contract request.

### Document Source

Affiliation Agreements, choose the most appropriate print template for your Division/School.

You may notice that depending on the Contract Type and print template to generate selected that additional fields are required (e.g. Exhibit A fields for SSA).

### Other (3rd Party, Internal – Other)

Choose this Document Source for all 3rd party contracts, or an internal contract document that won't be generated automatically by the system. If you select either of these options, you should upload the file in the fields that follow.

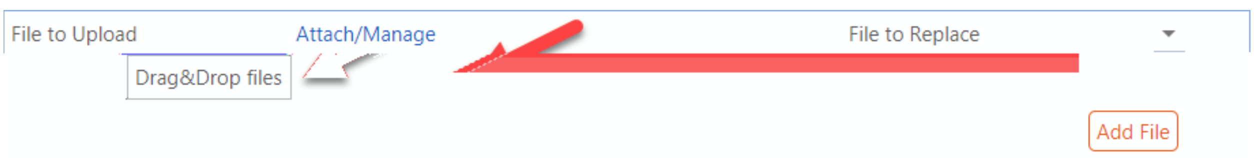
## Attachment Type to Upload

Categorize the kind of attachment you're uploading.

## File to Upload

If you are uploading a contract document, ensure that it is in a modifiable format, preferably Microsoft Word with Track Changes turned on (Review > Track Changes).

Click Attach/Manage to browse for the file on your computer or drag and drop the file into the "Drag&Drop files" box.




If there are existing attachment versions you uploaded but would like to replace with a newer version, select the existing attachment record in File to Replace. This will update the selected attachment record status to Superseded.

Then click Add File. Your attachment will appear in the Attachments table below.