



FLORIDA STATE UNIVERSITY (“FSU”) SPEARMART CONTRACT MODULE JOB AID

Purpose

To assist contract module users with detailed and step-by-step directions when working in the SpearMart contract module (Jaggaer). This module is only accessed with assignment by the University’s Contract Administrator.

Resources

Contract Administration
Office of Procurement Services
contracts@fsu.edu

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A. Definitions

Work Group – The Work Group is the Department or Office in which the roles are assigned. Users are set up to a specific Work Group related their department or office. User must request a module role via Online Role Request (e-ORR) to have access to the SpearMart contract module.

Contract Type – The type of contracts the Contract Manager may create. Contract Types assist in driving the approval workflow of the system.

First/Second Party –The system will default to FSU as the First Party. The Second Party is typically the party with which FSU is going to do business.

Workflow – The workflow is the process by which approvals and signatures are obtained. The workflow is driven by Contract Type, Work Group, and custom questions which appear during the “Create Contract” process. The module will automatically direct the contract to the appropriate approvers based on how the contract is set up, and how the questions are answered.



B. Contract Module Roles

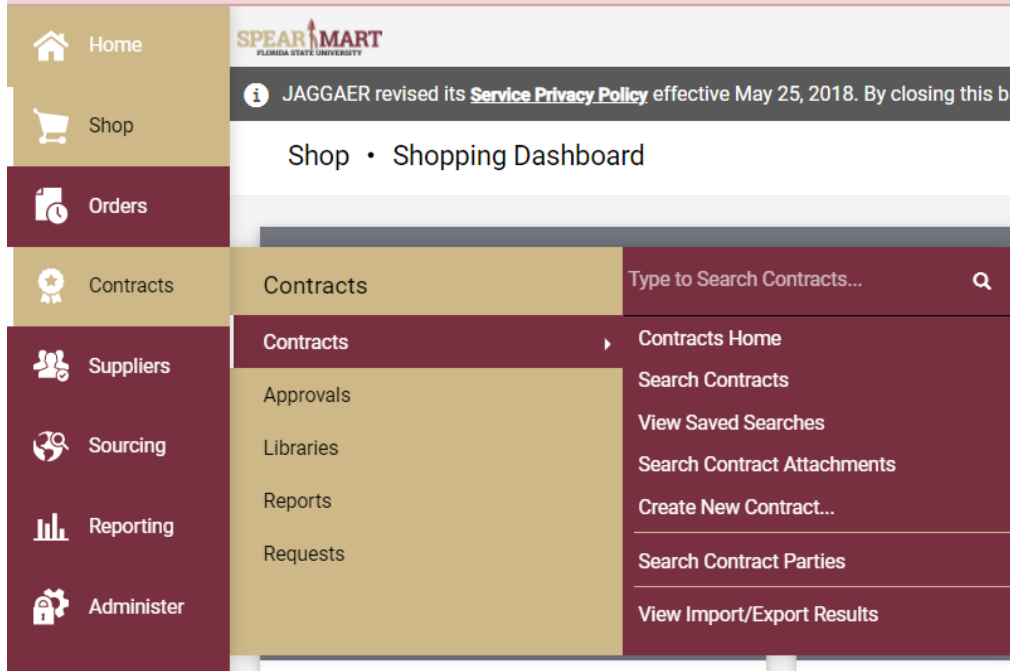
Contract Manager –A module user assigned to create/edit/manage contracts within a Work Group.

Contract Approver – This user may approve contracts in workflow but may not create or edit contracts without also being assigned the Contract Manager role. The Contract Approver role is similar to the approver role in the Requisitioning module of SpearMart.

Contract Stakeholder – This user may view contracts in their assigned work groups but may not create or edit contracts.

C. Contracts Module Access and Login

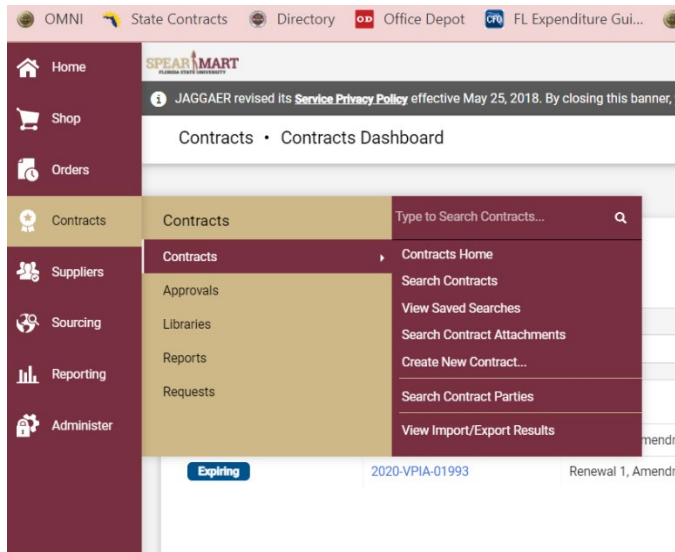
1. Login for the contract module is done through SpearMart. Log in to SpearMart as you would normally.
2. Once you have logged into SpearMart, hover over the “Contracts” tab on the left side of the screen. In ‘Contracts’, you should see the following list of options. If you are a Contract Manager, you will see ‘Create New Contract’. Contract Stakeholders and Approvers will not be able to “Create New Contract” unless they also have the Contract Manager role.



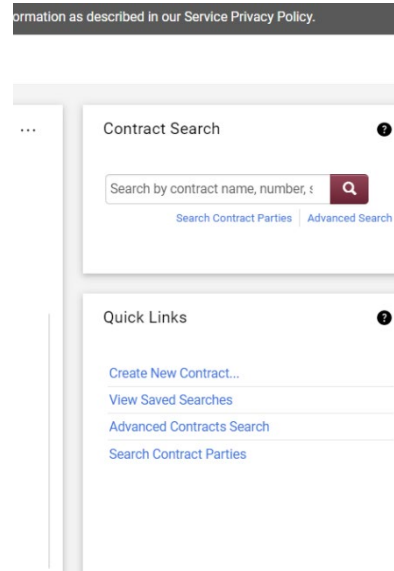


D. Create a Contract Entry

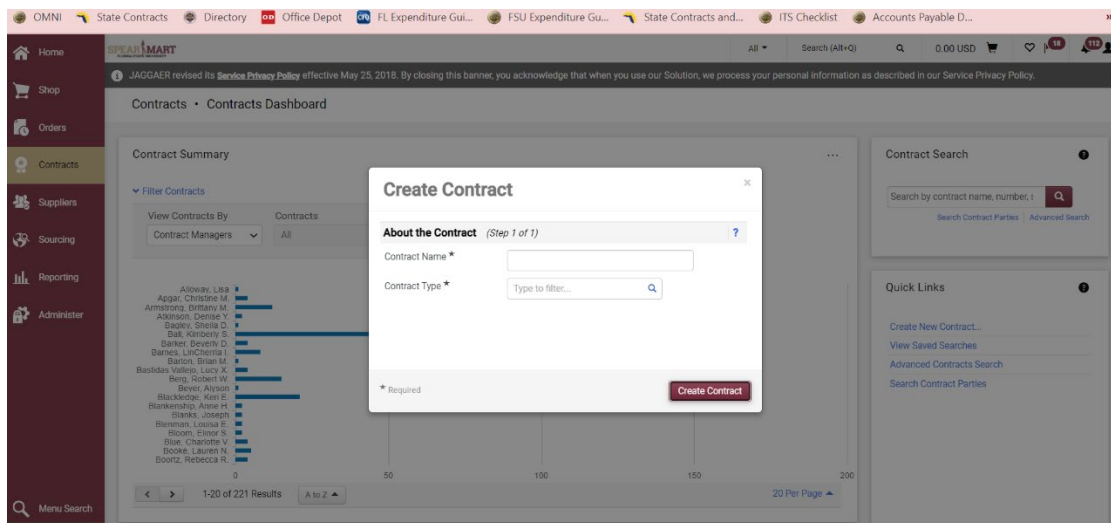
1. If you are ready to create a contract in the system, select 'Create New Contract' while hovering over the Contracts symbol on the tool bar on the left-hand side of your screen. You can also select "Contracts Home" and then "Create New Contract" from the Contracts home page.

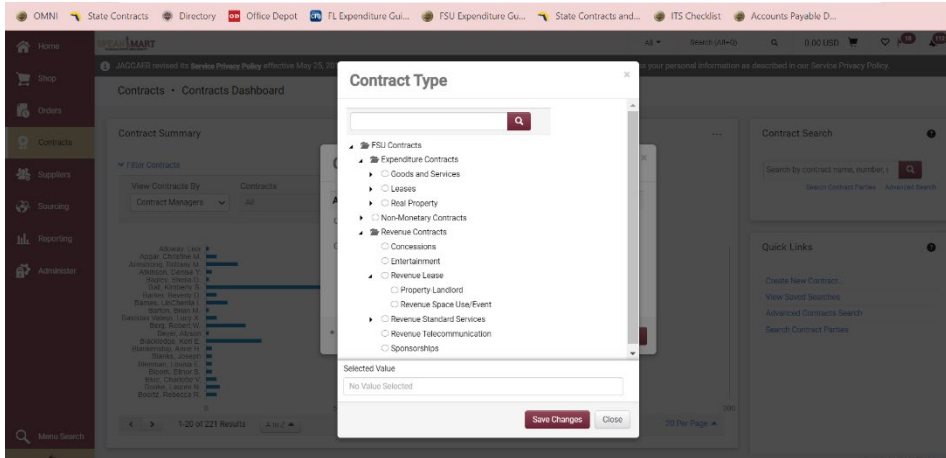


OR

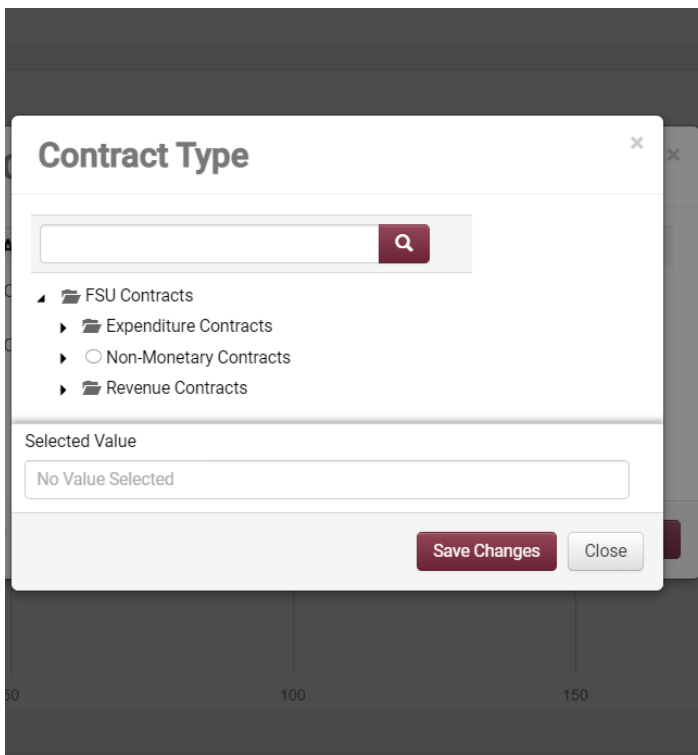


2. From the Create a Contract screen, you will be asked to enter a Contract Name and Contract Type. The Contract Name should be the second party's name. Next, select a Contract Type. If you don't know the type, select the Magnifying glass and search options will appear. See Appendix A below for Contract Type definitions.





Please note the black arrows next to the Contract Type Names. These arrows indicate that this item can be filtered further. **DO NOT USE** the “FSU Contracts” contract type, as it is just a category name. Please filter as far down as possible to select an appropriate contract type.



3. Once you've selected a contract type, then select a Work Group – pick the Work Group that you belong to and remember to filter down to the most specific section possible. **DO NOT** select “FSU” as your workgroup, this is simply a category name. Select “Save Changes” or “Next” when you are ready to proceed.



4. Main Document Template: **DO NOT SELECT A CONTRACT TEMPLATE-SKIP THIS STEP**

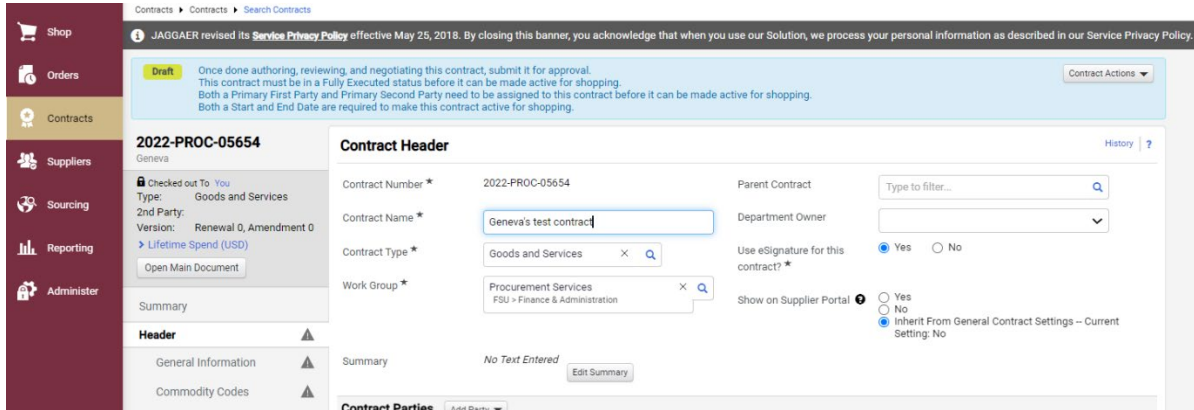
5. Header Section: this form has tabs on the left that you must work through and complete, one section at a time.

The Header Section is the first section to be completed. **Note that any fields with a “Star” are mandatory entries. All other fields are optional:**

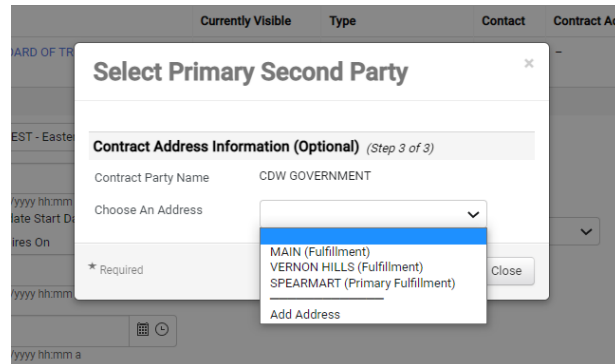
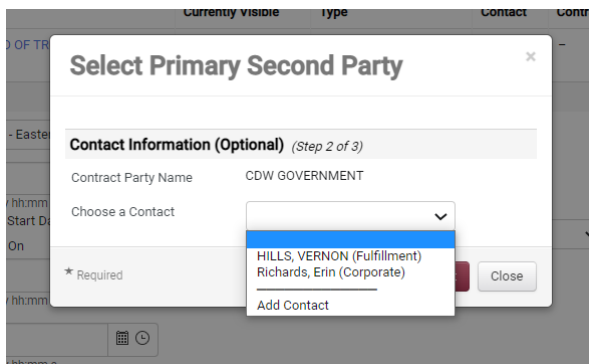
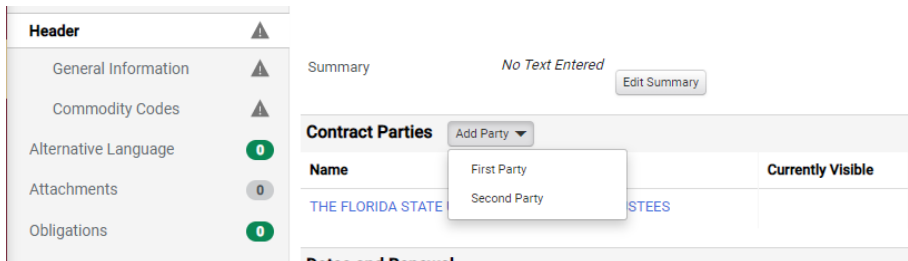
- Fields you already entered in the initial screens will appear, like Contract Name. However, please note that these fields are still editable while in “Draft” stage.
- The contract number was created by the system with the following methodology: {Fiscal Year}- {Work Group}- {Sequential Number} and cannot be edited.
- Contract Summary is optional but recommended. Please provide a brief description of the agreement’s objective.
- Parent Contract: You are able to link to a parent contract, as long as that contract is in the Contracts module. Simply search for the contract and select. For example, if the University has a broader agreement with a supplier, and your department is now completing its own agreement within the scope of that original agreement, you will identify that here.



- Use eSignature: This field will default to “yes” and will link automatically to DocuSign for final signature. The University’s policy is to use DocuSign for signatures where possible; however, if you require “wet signatures” or if you are planning to select the “no” option for eSignature, please contact the Contract Administrator first, to ensure there are no delays.



6. Contract Parties Section: The first party will always default to FSU. Even if you are uploading and signing another party’s agreement, FSU will still be the First Party for in the module. At this point you will also need to populate the Second Party, which would be the vendor. Select the ‘Add Party’ button and choose ‘Second Party’. If your Second Party is not in SpearMart already, you will need to add them by following the add supplier process found on the Procurement Services website: https://procurement.fsu.edu/suppliers_or_completing_the_customer_add_form. Vendors **MUST** be a registered as a SpearMart vendor before the contract can be submitted for approvals!





7. Dates and Renewal Section:

- Time Zone: This should default to Eastern, if not, simply change.
- Start Date: Required, **cannot be a past date**, can be a future date. If you want the start date to be the contract execution date (the date the contract is signed by both parties), then select the checkbox under Start Date and add an estimated Start Date. The system will automatically update with the last signature in DocuSign OR the upload date if you aren't using DocuSign.
- End Date: Required, must be a future date. Although the option of "No Expiration" exists in the system, please remember that generally we do not execute documents with no end date, per University regulations and Florida Statute. If you think you will need to use this option, contact the Contract Administrator first!
- Review Info: Not required, use if you want notifications for business reviews (contract management function).
- Renewal Info: If your contract contains renewals then these fields are REQUIRED. **NOTE: If the contract contains renewal options, please enter, if not the contract will not be able to be renewed!**

This is the last section on this tab, **so remember to Save Progress on the bottom of your screen!** Move to Next after you Save Progress.

nd Renewal

Time Zone: EDT/EST - Eastern Standard Time (US/Eas) [v]

Renewals Remaining: []

Start Date: 04/27/2022 12:00 AM [calendar] [clock]
mm/dd/yyyy hh:mm a
 Update Start Date Upon Execution ⓘ

Expiration: Expires On No Expiration

End Date: 04/30/2022 11:59 PM [calendar] [clock]
mm/dd/yyyy hh:mm a

Start Date (Renewal): 04/27/2022 12:00 AM [calendar] [clock]
mm/dd/yyyy hh:mm a

Term: 1 [] [v]

Remaining: []

Automatically Apply Price: Yes No

File with Renewal: []

Renewal Term: [] [v]

Auto-Renew: Yes No

Additional Details

8. General Information: This section is comprised of custom questions that will generate the correct approvals workflow. Different questions will appear for different contract types, so please ensure you've selected the right type. Once completed select "Save Progress" and "Next".

- Contract Value vs. Original Contract Value: If the contract is an original, not a renewal, then only enter the Contract Value. If the document is a renewal, please ensure that you enter both the Original Contract Value and then the Cumulative total value of the original AND renewal in the Contract Value field.



2022-PROC-05654

General Information

Department ID

Select the funding source (select all that apply):

E&G Funds Auxiliary Designated Funds C&G Funds
 Foundation Funds Revenue Auxiliary N/A No Cost Contract

If this contract is \$10,000 or above, what is the procurement method?

Whom in Procurement Services assisted on this Contract?

Is this a Contract Renewal or Amendment? Yes No

Original Contract Value (Renewals and Amendments Only)

Total Contract Value: 100,000.00

FSU Reimbursement for Direct Expenses: Yes No

Payment Terms: Net 40

Advance Payments? Yes No

★ Required

Previous Save Progress Next

9. Commodity Code: **SKIP THIS STEP** and select “Save Changes” and “Next”.

10. Attachments: This is where you upload your contract. You will see an “Upload Main Document” option where you will upload the document you are seeking to have signed. If you are including multiple documents, such as a previously signed agreement, be sure the **most current agreement** is identified as the “main document.” Once completed select “Save Changes” and “Next”.

22-PROC-05654

Attachments

General (1) Internal Only (0) Obligations (0)

Add Attachments

Main Document

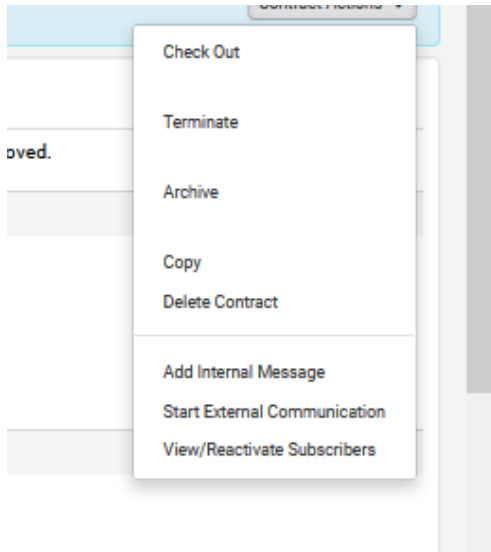
Print Order	Attachment	Print with Full Contract	Version	Size	Date Uploaded	Actions
1	Main Document 2022-04-22 2022-PROC-05654 - Renewal Template (version 1).docx	✓	1	27 KB	4/22/2022 11:16:17 AM	Actions

11. Obligations tab. **SKIP THIS STEP** and select “Save Changes” and “Next”.

12. Review Rounds. **SKIP THIS STEP** and select “Save Changes” and “Next”.



13. eSignatures. If you aren't obtaining eSignatures, you will skip this step.



Add a signer: Select which party this person will be signatory for and select the Contact if their name and email is already available in the system. If not, select 'Manually Enter Signer. Repeat for the other party.

Set up your eSignature signers below. You can launch the eSig

Settings

Placement of Signature Block Fields: Manual - Placed by Contract

SMS Authentication Required: No

Signers

[Add Signer](#)

No signers have been added.

Add Signer

Contract Party: THE FLORIDA STATE UNIVERSITY BOARD OF TRUSTEES

Choose a signer: Existing Contact Manually Enter

Name *: Johnny Trevino

Email *: jtrevino@fsu.edu

Mobile Phone Number: 850 644 6850
Country Code, Area Code, Phone Number

Title: Prgm Dir, Contract Admin

* Required [Save Changes](#) [Close](#)

Add Signer

Contract Party: CDW GOVERNMENT

Choose a signer: Existing Contact Manually Enter

Choose a Contact *: [Q](#)

Signing Order: Erin Richards, VERNON HILLS

* Required [Save Changes](#) [Close](#)



14. Submit for Approval: **YOU'RE DONE!** Make sure all areas are checked green, which means you've entered all required information. Select "Submit for Approval."

Note that you can select 'View Approval Steps' and see where your contract will be routed and to whom. You can follow along to see where it is at any given time.

2022-PROC-05929
test 06082022

Checked out To You
Type: Goods and Services
2nd Party: CDW GOVERNMENT
Dates: 6/15/2022 - 6/23/2022
Version: Renewal 0, Amendment 0
Lifetime Spend (USD)
Open Main Document

Summary
Header ✓
General Information ✓
Commodity Codes ✓
Alternative Language 0
Attachments 1
Obligations 0
Review Rounds 1
eSignature 2

Submit for Approval

Submit for Approval

✓ All sections are complete. You may submit your contract for approval.

Section	Progress
Header	✓ Required Fields Complete
Attachments	1 Required Fields Complete
Review Rounds	1 Required Fields Complete
eSignature	2 Required Fields Complete

View Approval Steps

Show skipped steps

Orientation: Horizontal

Submitted Future

Compile Robot Future

Contract Admin Approval Future
View approvers

Procurement Services Approval Future
View approvers

Legal Approval Future
View approvers

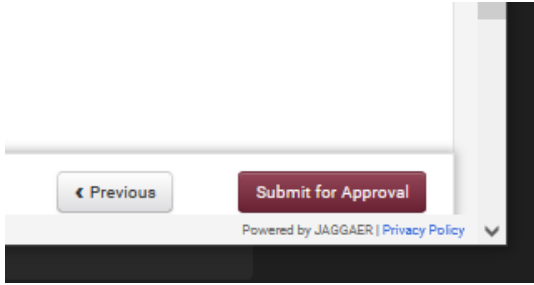
Sign Future

Workflow Step Approvers (Contract Admin Approval)

Approver Group : Contract Admin Approval

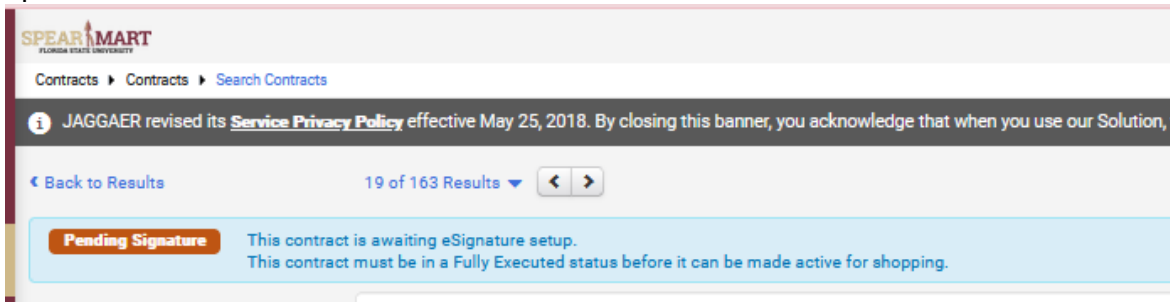
Johnny Trevino	jtrevino@fsu.edu	+1 850-644-3463
Mary E. Lovett	med06f@fsu.edu	+1 850-644-6710
Rosella M. Murton	rmurton@fsu.edu	+1 850-644-9719

Close

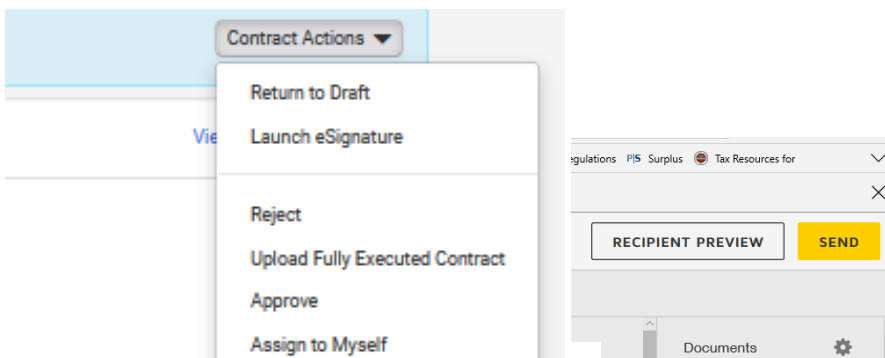


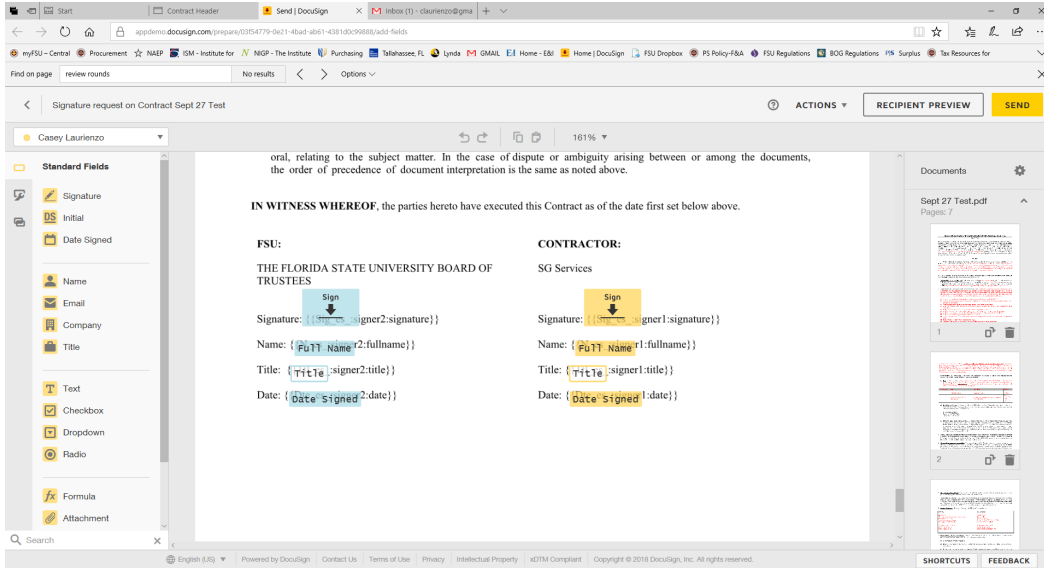
E. Launch for e-Signature/DocuSign

1. Once the contract has finished the approval rounds, you will receive an email notification. If you are using eSignature, this notification will inform you that the contract is ready to launch eSignatures. If not, you will receive a notification that all approvals are obtained. In this scenario, the contract will remain in the “pending” stage until a final document is uploaded.

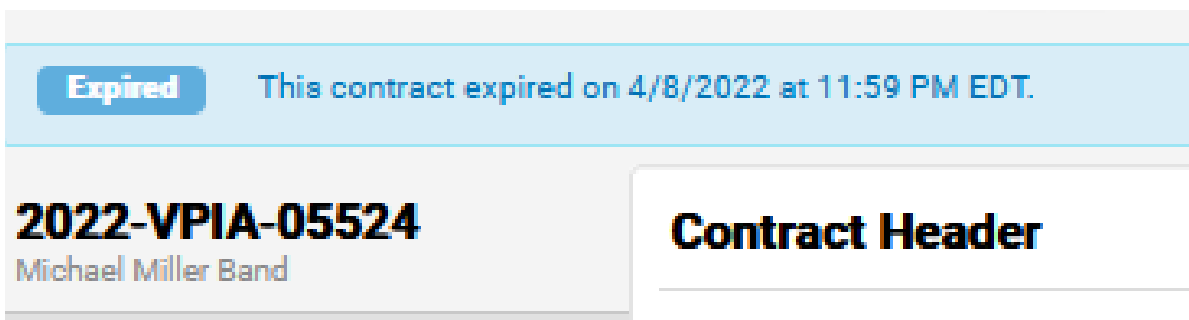
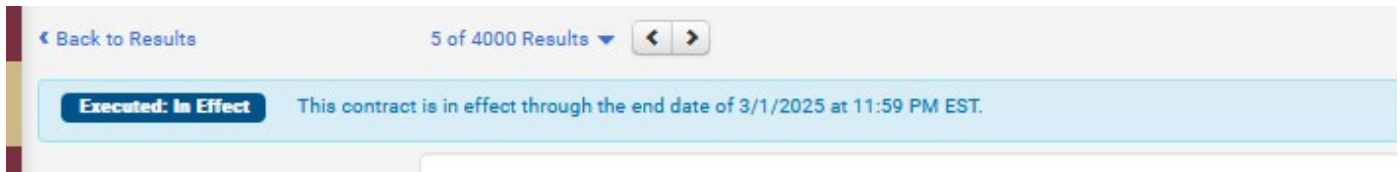


2. To send for eSignatures, under “Contract Actions”, select “Launch eSignature”. The system will take you to DocuSign to ensure identify where signatures and initials need to be placed.





3. Once ready, select Send and the document will route for eSignature. You will receive emails/notifications when signatures are obtained and finally when the document is “done”.
4. When the contract is “completed”, the status bar at the top of the contract page will show “Completed”. It will show “Draft” if not completed and “Expired” for contracts that have expired:



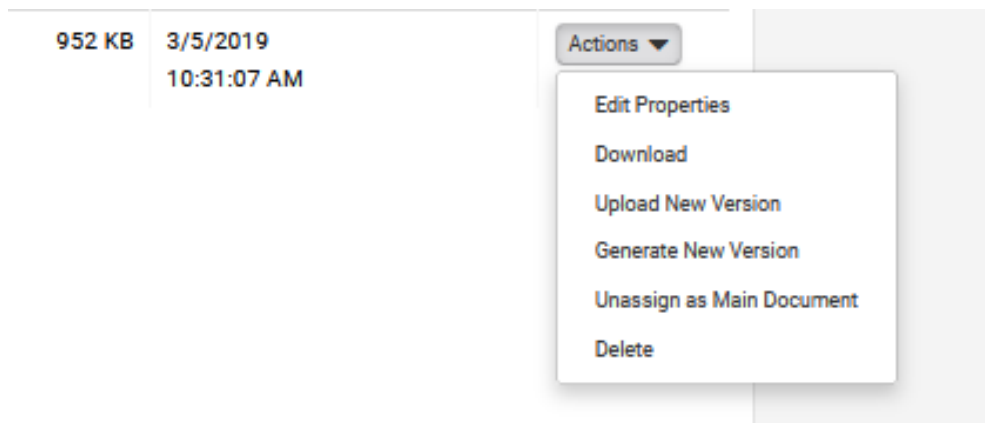
Congratulations! You now have an executed contract

F. Renewals and Amendments

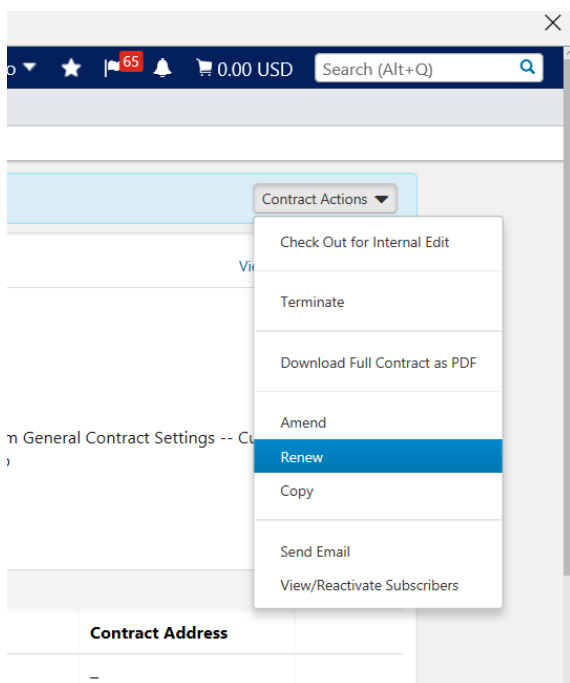
1. When it is time to renew your contracts, or amend, you must first search and open the contract that you want to renew or amend. Then select “amend or renew” under the

Contract Actions tab. **Important note for renewals: possibility to renew must have been provided in the original agreement, and the contract cannot have expired.**

- From the Attachments tab on the left of the contract, select “Actions” next to the Main Document and “Unassign as Main Document”. This will allow you to add a new main document for routing.

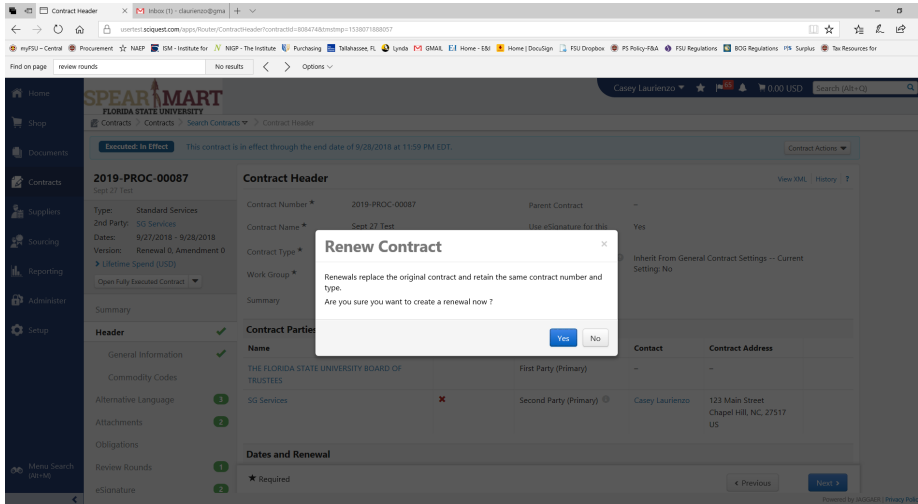


- Once unassigned, you will see a new option appear next to Add Attachments called “Upload Main Document”. Select this option and upload your draft renewal or amendment.
- Once a new document has been uploaded, you can move on to renewing or amending the contract.
- Select “Renew” or “Amend” from the Contract Actions tab (Contract Manager).

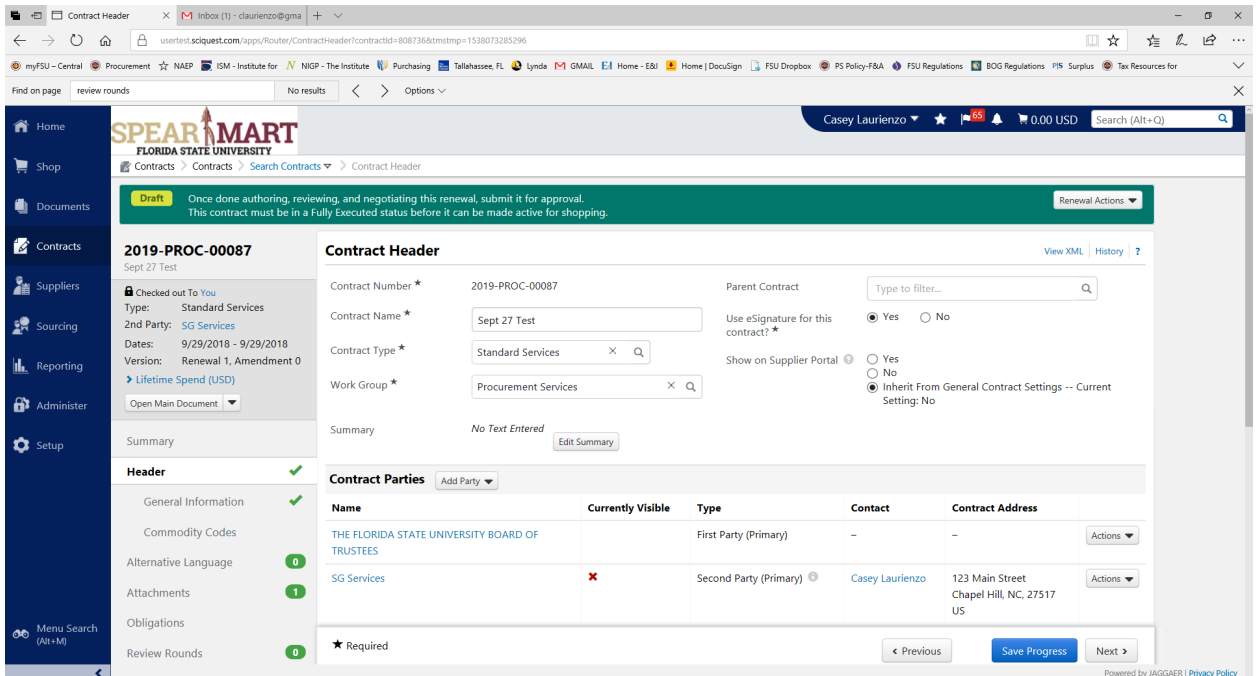




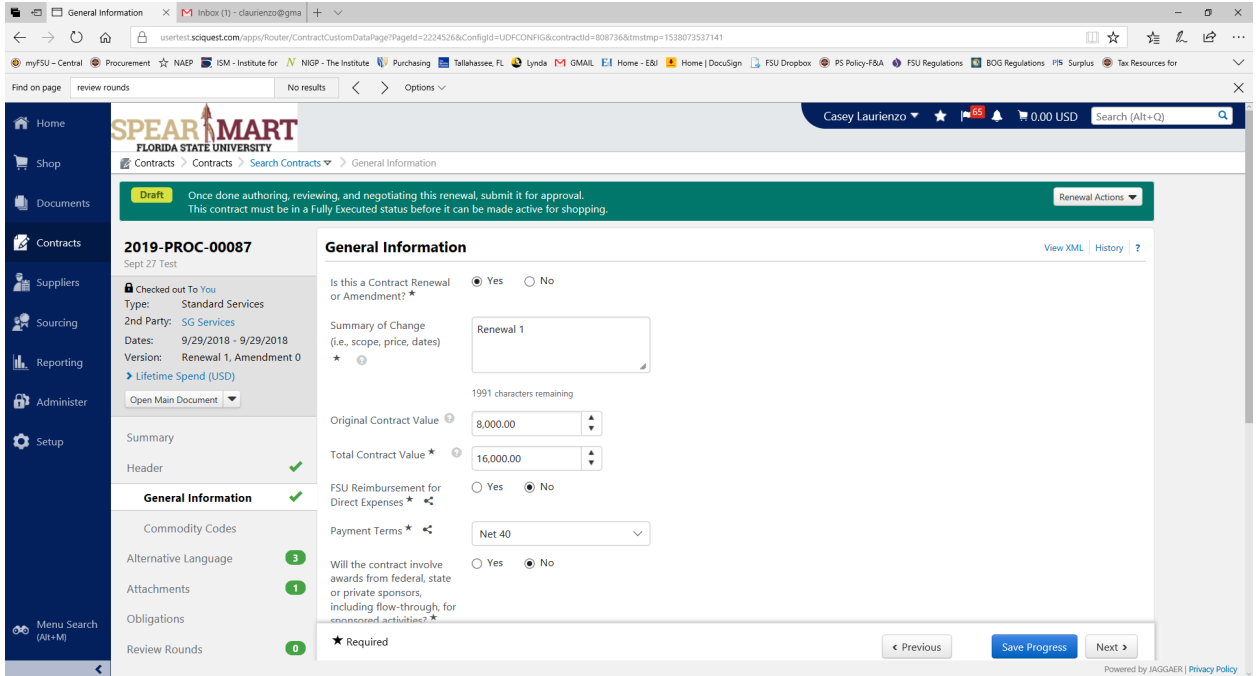
- 6. From there you will confirm renewal or amendment and select “Yes.” Note: this will not delete your original contract, just create a new entry with the same contract number indicating a renewal or amendment.



- 7. From the next screen you will follow the same steps as with an original contract, starting with editing the start/end date fields to match the new dates, if applicable, and proceeding with any other fields that may have changed. The document will route for approvals and signatures just as the original document did.



- 8. Remember to update any new info as you move through the tabs, such as original and total contract values.



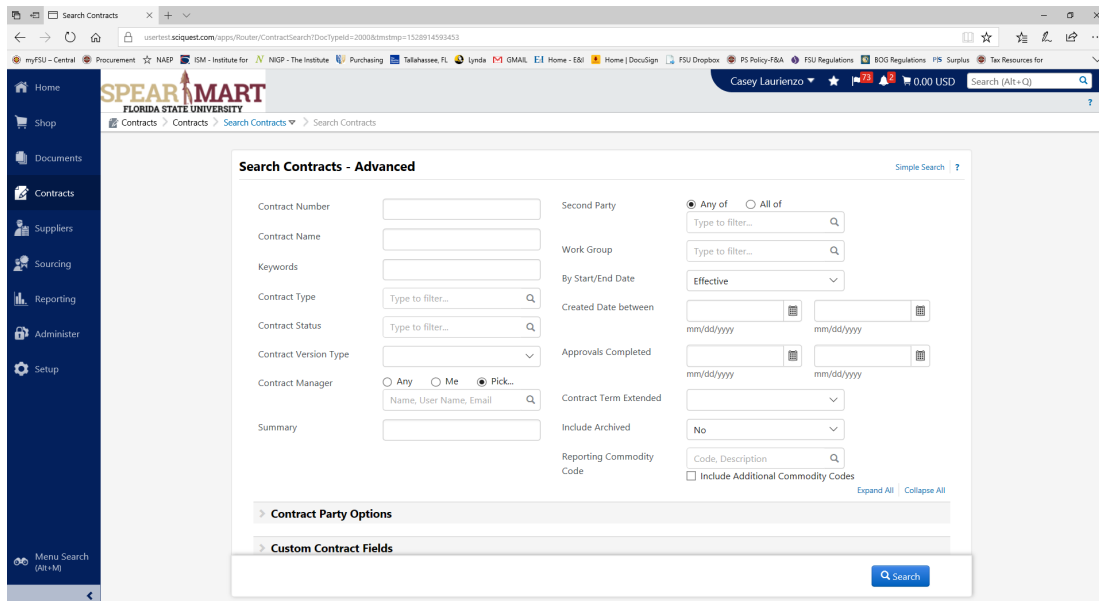
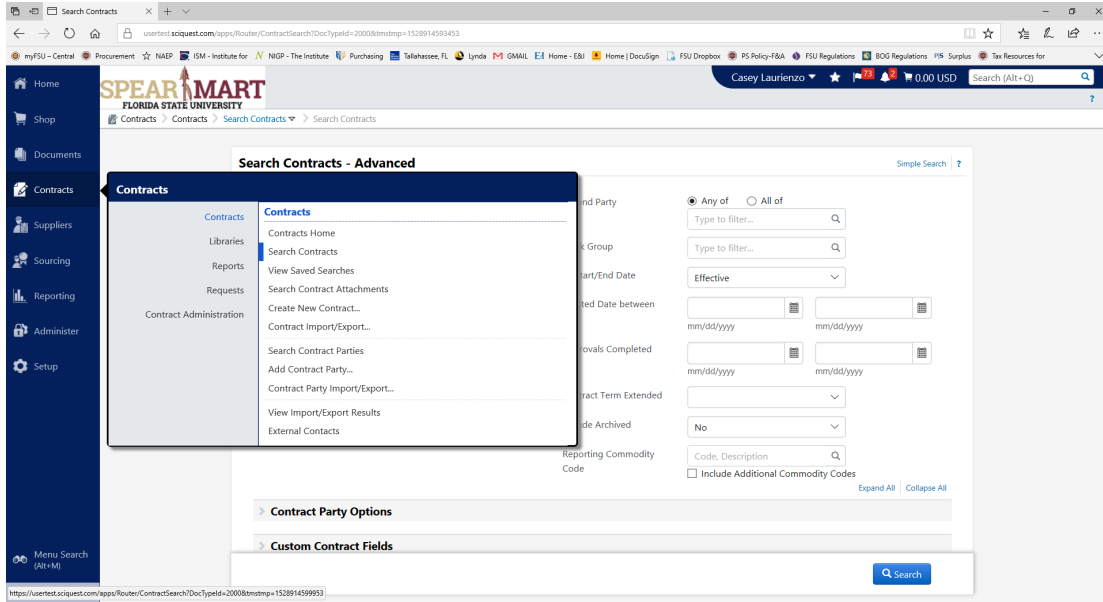
- When you get to Attachments, you will see the new document that you loaded assigned as the Main Document - from here you will want to edit and finalize your draft. All steps will mimic the original “create contract” steps.

Note: when searching contracts, you will be able to search by renewal, amended or original contract status.

When renewing or amending especially, it is a good idea to name your attachments. The most current, active document should be the Main Document always, but consider updating any other attachment names for clarity (i.e., rename the original agreement “Original Contract” after executing the first renewal).

G. Contract Module Search

- Searching contracts can be done from main Contracts selection pane or the Contracts Home page. Contracts can be searched by a variety of fields via the Advances Search option. Search results can be exported to Excel.



Note: if you are a new contract manager to a work group, you will be able to see, but not access previous agreements for your area. If you need access to a contract to amend, or renew, reach out to contracts@fsu.edu for help.



Appendix A

Contract Types

The following are the definitions of the various contract types. This list will assist users in understanding what kind of contract to use.

Contract Groups	Contract Types	Definition
Expenditure	Goods and Services	Examples of Goods and Services include general services, goods and products, professional & artistic services, or software licenses.
	-Goods	Consumables or tangible items being purchased.
	-Services	Intangible items, often deliverable and performance based payments.
	-Professional and Artistic Services	Second party is offering a specific performance or service related to the production of a specific event
	-Consulting	Any arrangement where a consultant is being used for University business.
	-Charters (Air and Bus)	
	-Equipment Leases/Maintenance	
	-Honoraria	Honoraria are tokens of gratitude or appreciation. It is a one-time payment made to an individual, who is not an employee of the University.
	-Hotels	Applies for both events and over-night stays
	-Standard Services	To be used for any other service not listed.
	-Software Licensing & Services	
	Real Property	Agreements pertaining to the purchase, leasing or management of real property.
	-Land Acquisition	Agreements for the purchase or sale of real property.
	-Leases	Agreements for rental of property, whether landlord or tenant relationship.
	-Management	Agreements for the management of real property.
	Construction	Construction Contracts are typically initiated by Facilities and include



		architectural, engineering and land surveying services.
Revenue Generating	Concessions	Concessions grant access to University property, whether tangible or intangible, in exchange for payment.
	-Sponsorships	An individual or organization providing sponsorship or support to the University.
	-Managed Services	Services provided on behalf of FSU, usually for FSU property or businesses.
Non-Monetary	Affiliation Agreements	These types of agreements provide a benefit to our students in terms of experience and additional learning opportunities; provide benefit to the second party receiving services of FSU students.
	Intellectual Property	Intellectual Property Agreements pertain to a third party's use of our intellectual property, or vice versa.
	-Copyright	Pertain to the use of one parties copyright material, whether FSU or a second party.
	-Data Use/Sharing	Specifically deal with the transfer of information from two parties.
	-Material Transfer	Material Transfer Agreements govern the transfer of tangible research materials between the University and another company or institution.
	-Inter-Institution	Agreements between similar institutions for the purpose of sharing or marketing intellectual property.
	-Non-Disclosure/Confidentiality	Non-Disclosure Agreements (NDA's), or confidentiality agreements, outline confidential material, knowledge, or information that two parties wish to share in order to conduct business with one another.
	-Patents and Trademarks	Agreements whereby the University is going to pay a third party for patent or trademark use, or vice versa.