Requesting Contracts Electronically in Total Contract Manager

New Process

ASU is introducing a new software platform for contract management called Total Contract Manager (TCM). The end-goal of this implementation is to consolidate all non-employment university contracts into one application that is user-friendly for contract requestors, approvers, our legal office and contract signature authorities. TCM provides the University the potential to go paperless in our contracting processes beginning with a contract request which allows dynamic approvals, negotiation/red-line and finally ending with an electronic signature. TCM is provided by the same company that makes our YoMart software (JAGGAER, formerly SciQuest) so we hope the software platform will have some baked-in user friendliness for our campus.

Quick Points on the New Process

- Vendors we are contracting with must be in YoMart before we begin the TCM contract request process. If your vendor is not in YoMart, contact the Controller’s Office before beginning a contract request. More information on this is in step 4 of the next section.
- TCM can handle processing ASU contract templates and 3rd party contracts.
- TCM uses DocuSign for electronic signature.
Submitting a Contract Request

1. Log into Yo-Mart:

   Navigate to systems.appstate.edu and click on the ‘Yo-Mart’ header link. Next, click the link at the top of the page to log into Yo-Mart. This link will send you to a log-in screen where you will sign in with your ASU username and password.

2. Navigate to the contract request wizard:

   In the menu bar on the left, hover over the ‘Contracts’ logo, click ‘Requests’ and then click ‘Request Contract’. Notice that this screenshot shows more options than you see, Yo-Mart tailors different permissions to different users depending on whomever is logged in.
3. Select a contract request template:

You should see this pop-up window. Give your contract request a name which should be something that makes sense to you because you can search on that name later when looking for the completed contract. Choose a contract request template, you can either click on the magnifying glass to see what is available or just start typing the template you know you want to use.

Once you have given your contract request a name that is relative to what you are doing and have selected a template, click the ‘Submit’ button.
4. Complete the contract request wizard:

You should see a new screen similar to the screenshot above. This wizard will walk you through providing all the information needed for the contract request. Read all the instructions and press ‘Next’ through the screens.

On the ‘Attachments’ screen, you may attach any documents you would like any approvers or the contract manager to see but do not feel obligated to attach anything if this contract request will eventually use a standard ASU contract template. If you are requesting a standard ASU template, TCM will generate that for the contract manager later in the process based on the information you provide. If you are requesting a 3rd party contract, attach that contract here.

Click ‘Next’ until you are on the ‘Choose Vendor’ screen, shown below. Here you must choose the vendor you are contracting with in the ‘Second Patry’ field. If the vendor you are not contracting with is not in the system, you need to exit the contract request form and establish that vendor in the system with the Controllers Office. The form for this can be found back on the homepage of Yo-Mart, the form is titled, “New Supplier Form”.

![Image of the contract request wizard](image-url)
5. Review and submit your contract request:

After you have chosen a vendor, or ‘Second Party’, click ‘Next’ to complete the remaining questions on the ‘Contract Information’ screen.

After you have populated all required fields in the contract request form, the ‘Review and Complete’ screen will show all green check marks and you are ready to submit the request. Once you submit the request it will be routed through a workflow of approvers, ending with a contract manager who will work with the University Attorney’s office to potentially red line and send for signature. If you would like to see exactly who will be approving this contract request, you can click on the ‘Contract Request Workflow’ tab which will show you this screen:

Approvals will vary depending on the detail of the contract request, but this page will show you how many approvals the request must go through, and who those approvers are.
Click on the ‘View Approvers’ link and Yo-Mart will show you where that request is going:

If the approvers look good, go back to the ‘Approve and Complete’ tab and click ‘Complete Request’.

6. You can check up on where the request is in the approval process anytime by going to Contracts -> Requests -> My Contract Requests.

Questions or Issues

If you have any questions or issues with this new process contact Clint Coffey at 828.262.6114 / coffeycg1@appstate.edu or Vickie Young at 828.262.4027 / youngvc@appstate.edu.

If you have questions about vendor set up, contact Dawn Sturgill at 828-262-6425 / sturgllcs@appstate.edu.