

TCM: Business Officer Approval of Contract Requests & Contract Signature

Overview

- This job aid is intended to provide guidance to Business Officers for performing the following tasks:
 - Approve contract requests in TCM
 - Sign contracts

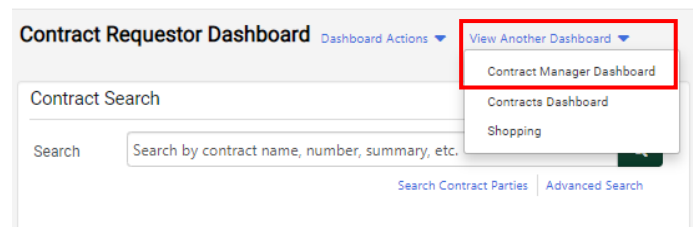
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I. Accessing Total Contract Manager (TCM)

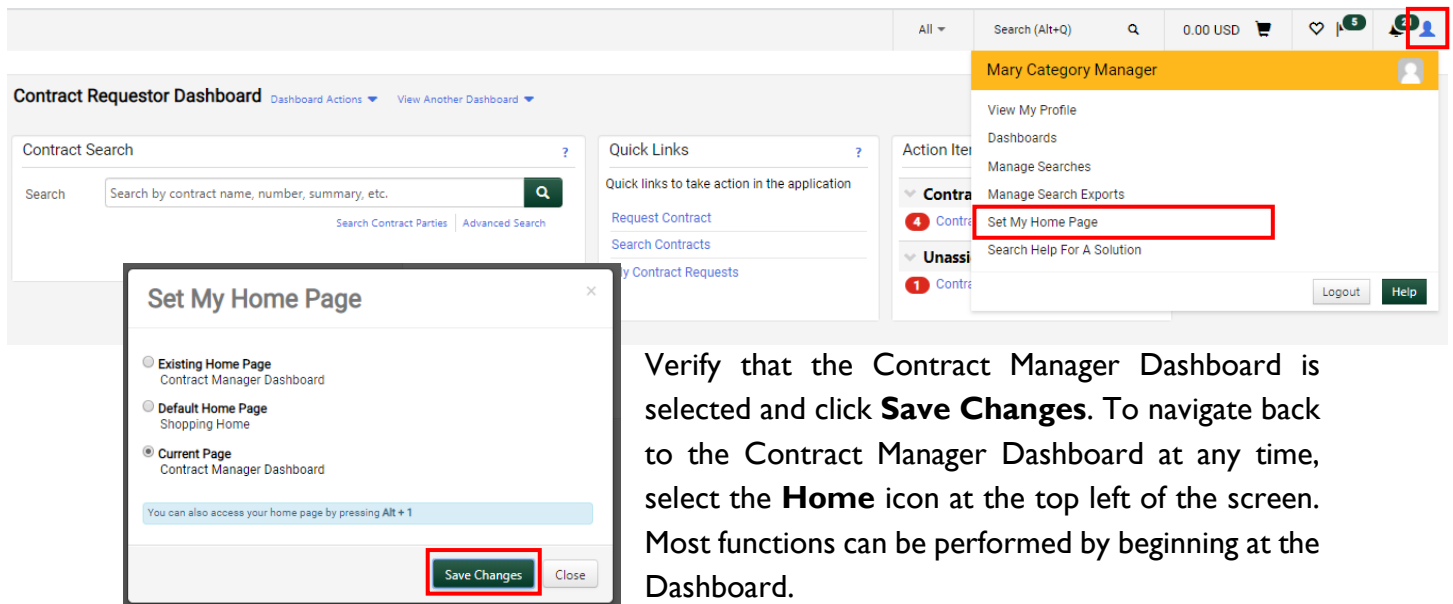
1. TCM Live Environment is accessible at: baylor.edu/tcm. Use this site to explore current contacts, add new contacts, or access the contract templates available for future contracts on behalf of Baylor University
2. A Test and Training Environment is also available at: baylor.edu/tcmtest. Please use this site if you are new to TCM and need to practice navigating the system, entering contract requests, etc.
3. Both sites can be accessed using your Bear ID and Password.

2. Contract Manager Dashboard

1. To set the Contract Manager Dashboard as your Home Page, select the **Contract Manager Dashboard** under the **View Another Dashboard** dropdown.



Select the profile icon at the top right of the screen and **Set My Home Page**.

A composite image showing two screenshots from the TCM system. The top screenshot shows the 'Contract Requestor Dashboard' with a user profile icon in the top right corner. A dropdown menu is open, showing options like 'View My Profile', 'Dashboards', and 'Set My Home Page'. The 'Set My Home Page' option is highlighted with a red rectangular box. The bottom screenshot shows a 'Set My Home Page' dialog box. It has three radio button options: 'Existing Home Page' (Contract Manager Dashboard), 'Default Home Page' (Shopping Home), and 'Current Page' (Contract Manager Dashboard). The 'Current Page' option is selected. At the bottom of the dialog box, there is a 'Save Changes' button highlighted with a red rectangular box and a 'Close' button.

Verify that the Contract Manager Dashboard is selected and click **Save Changes**. To navigate back to the Contract Manager Dashboard at any time, select the **Home** icon at the top left of the screen. Most functions can be performed by beginning at the Dashboard.

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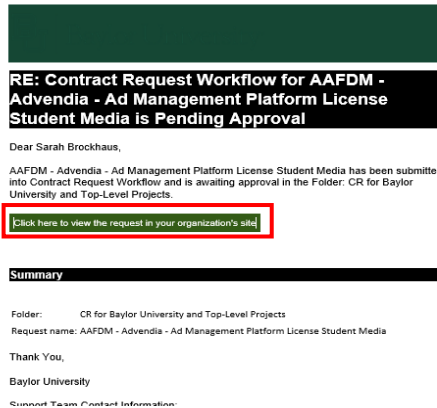
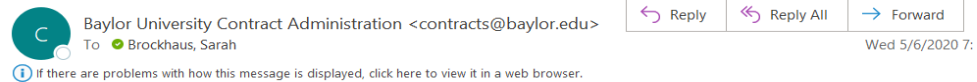
3. Action Items & Notifications

If your staff members need assistance with Contract Request, please provide them a copy of the **Contract Request job aid** for step by step instructions.

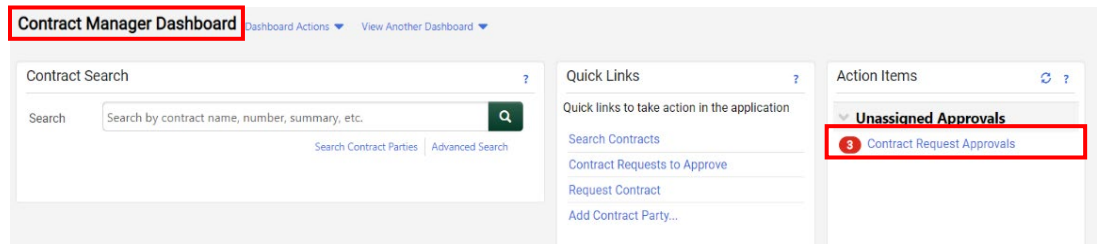
Review and approval of a Contract Request can be completed from either Outlook or TCM.

1. From Outlook, click on the hyperlink within a **Pending Contract Request email** notification, OR

Contract Request Workflow for AAFDM - Advendia - Ad Management Platform License S

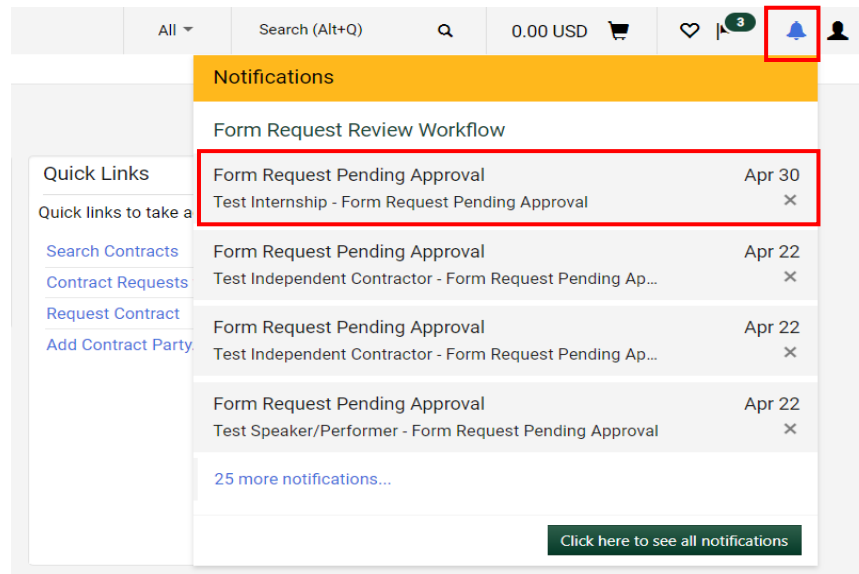


2. Sign in to TCM, then either:
 - a. Click on **Contract Request Approvals** under Action Items on your Dashboard, OR



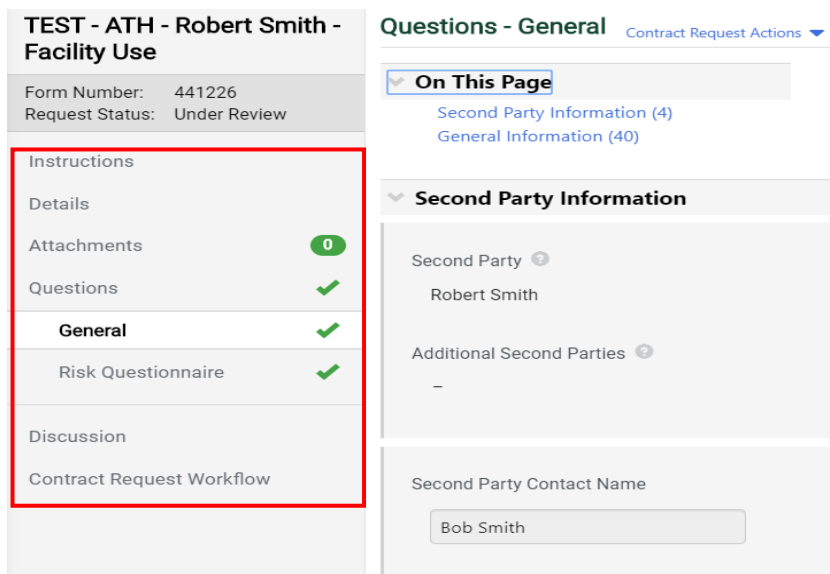
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- b. Click on the **Notifications bell** at the top right of your screen, then click on the Contract Request you would like to review and approve.



4. Review a Pending Contract Request

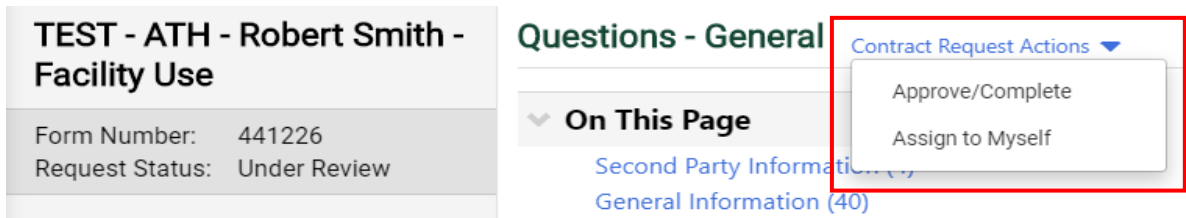
- I. Review the Contract Request and the proposed Contract by clicking through the tabs on the left side of the screen. In addition, click on the *Discussion* tab on the left side of the screen to see any messages sent from the Contract Requester



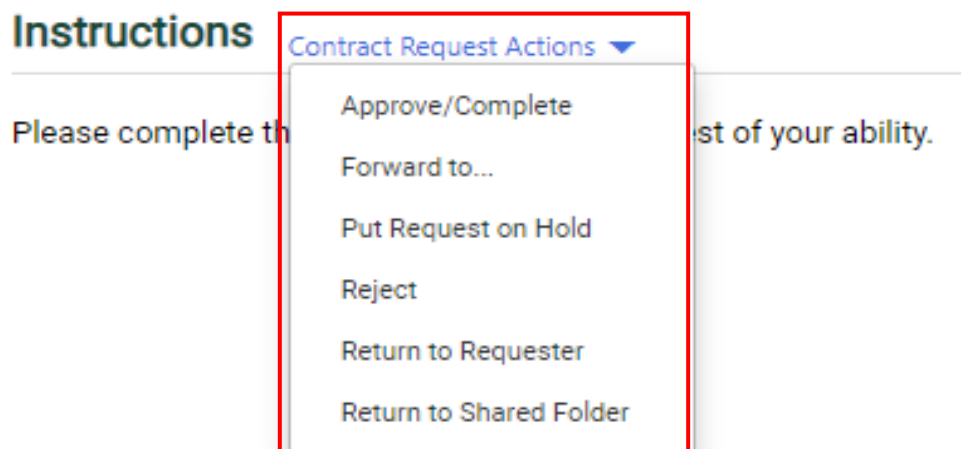
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5. Approve or Reject a Request.

- I. From the **Contract Request Actions** menu, click **Approve/Complete** if the Contract Request is complete and accurate and the contract can proceed from a budget and business case perspective.
 - a. If the request needs to be returned to the requester for corrections or supplemental information, or if the request needs to be forwarded to another approver, click **Assign to Myself**. Otherwise, click Approve/Complete.



- b. If you click Assign to Myself, and then select the Contract Request Actions menu again, you will see options to Forward, Put the Request on Hold, Reject, or Return to Requester.
 1. Select Forward to... if you need to forward the Contract Request to a different approver.
 2. Select Put Request on Hold if you need to revisit the Contract Request at a later date.
 3. Select Reject if the Contract Request will be rejected and not be allowed to move forward.
 4. Select Return to Requester if the Contract Request should be returned so that the Contract Requester can provide additional information and then re-submit the Contract Request.



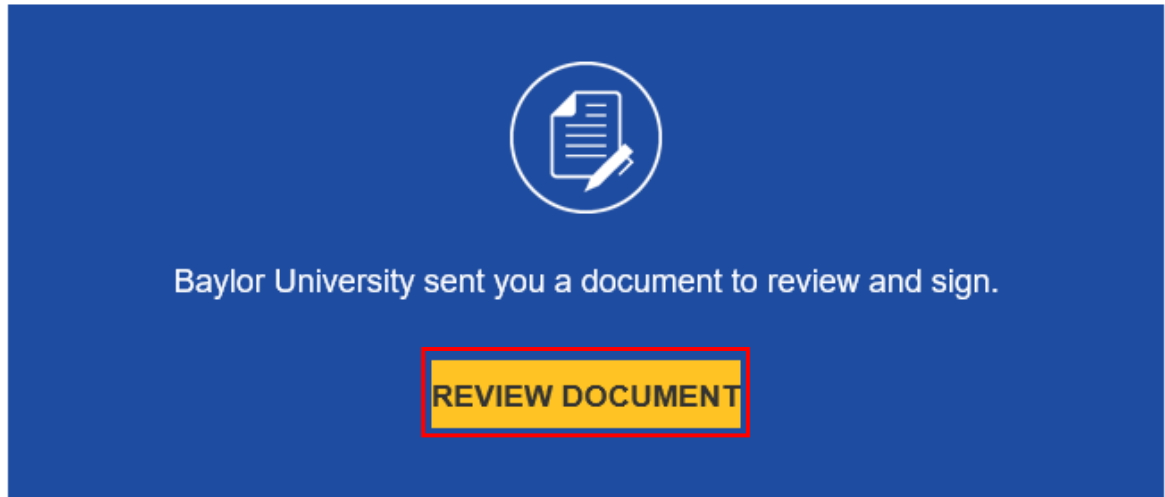
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6. Sign a Contract.

Business Officer positions have received delegated authority to sign contracts up to a value of \$100,000. Business Officers should only sign contracts which fall within their divisions or departments, and should not sign contracts over \$100,000.

- I. Signature requests from Baylor University will be sent from Baylor University's DocuSign account (Baylor University via DocuSign), and should contain the contract name (using Baylor's contract naming convention). Click **Review Document** to open the contract and sign.

DocuSign



Baylor University
contracts_admin@baylor.edu

Dr. Brandi Anthony,

Please DocuSign AAHPR - Victory Physical Therapy - HHPR MOA.pdf

Thank You, Baylor University

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2. **Agree to use Electronic Records and Signature.** Check the box to agree to use electronic records and signatures and click **Continue**.

Please Review & Act on These Documents



Sarah Brockhaus
Baylor University Procurement Services

Please read the [Electronic Records and Signature Disclosure](#).

I agree to use electronic records and signatures.

CONTINUE OTHER ACTIONS ▾

DocuSign Envelope ID: EA8828B4-1F3D-42BE-9A21-9A9E1BCBABC6

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
1301 2nd Ave, Suite 2000 • Seattle • Washington 98101 • (206) 219-0200
www.docusign.com

3. **Review the Contract.** Read the Contract by scrolling through each page.

Please review the documents below. OTHER ACTIONS ▾

START

DocuSign Envelope ID: EA8828B4-1F3D-42BE-9A21-9A9E1BCBABC6

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www.docusign.com

SPEAKER/ARTIST/PERFORMER
AGREEMENT BETWEEN
BAYLOR UNIVERSITY

4. **Sign the Contract.** Click on the **Sign** tab, and then **Adopt and Sign** to sign the Contract.

of the parties with respect to its subject matter. No prior or contemporaneous agreement or understanding will be effective.

THE PARTIES HAVE CAUSED THIS AGREEMENT TO BE EXECUTED BY THEIR AUTHORIZED REPRESENTATIVE.

NEXT

Baylor University	Hilton
SIGN	DocuSigned by: Sally Hilton
Signature <small>(Sign Here)</small>	Signature
Vice-President	Vice-President
Title	Title
12/16/2015	12/16/2015
Date	Date

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Adopt Your Signature

Confirm your name, initials, and signature.

Full Name
Reagan Ramsower

Initials
RR

[Select Style](#) [Draw](#)

PREVIEW

DocuSigned by:
Reagan Ramsower
54B45EFC77E4FF...

DS
RR

[Change Style](#)

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN **CANCEL**

5. **Finish.** Click Finish when you are done signing.

of the parties with respect to its subject matter. No prior or contemporaneous agreement or understanding will be effective.

The parties have caused this Agreement to be executed by their authorized representative.

Baylor University	Hilton
DocuSigned by: <i>Reagan Ramsower</i>	DocuSigned by: <i>Sally Hilton</i>
Signature 54B45EFC77E4FF...	Signature 54B45EFC77E4FF...
Senior VP for Operations & CFO	Vice-President
Title	Title
12/16/2015	12/16/2015
Date	Date

h to send the completed document.

FINISH **OTHER ACTIONS**

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6. Other Actions.

If you do not wish to approve the Contract and Sign, click **Other Actions**.

Click **Decline to Sign** if you do not want to approve and sign the contract. A notification will be sent to the Contract Manager that the Contract has been declined.

Click **Assign to Someone Else** to send the contract to another signatory for signature instead, if needed.

The screenshot displays a DocuSign interface for a contract document. The document text includes: "of the parties with respect to its subject matter. No prior or contemporaneous agreement or understanding will be effective." and "The parties have caused this Agreement to". The document is signed by "Baylor University" with a signature of "Reagan Ramsower" and a title of "Senior VP for Operations & CFO". The date is "12/16/2015". A modal menu is open, showing four options: "FINISH LATER", "PRINT & SIGN", "ASSIGN TO SOMEONE ELSE", and "DECLINE TO SIGN". The "ASSIGN TO SOMEONE ELSE" and "DECLINE TO SIGN" buttons are highlighted with red boxes. Below the modal, there are links for "Help & Support", "View History", "View Electronic Record and Signature Disclosure", "About DocuSign", and "View Certificate (PDF)". At the bottom of the interface, there is a blue bar with the text "Done! Click Finish to send the completed document." and two buttons: "FINISH" and "OTHER ACTIONS". The "OTHER ACTIONS" button is highlighted with a red box.