SETON HALL UNIVERSITY
CONTRACT MANAGEMENT
END USER GUIDE

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Overview

This guide should share as a reference guide for Seton Hall's ESM Contracts Solution. The topics covered in this guide will cover Basic Navigation, Creating a Contract, Attaching Documents, Submitting a Contract For Approval, Approving Contracts and Viewing Contracts.

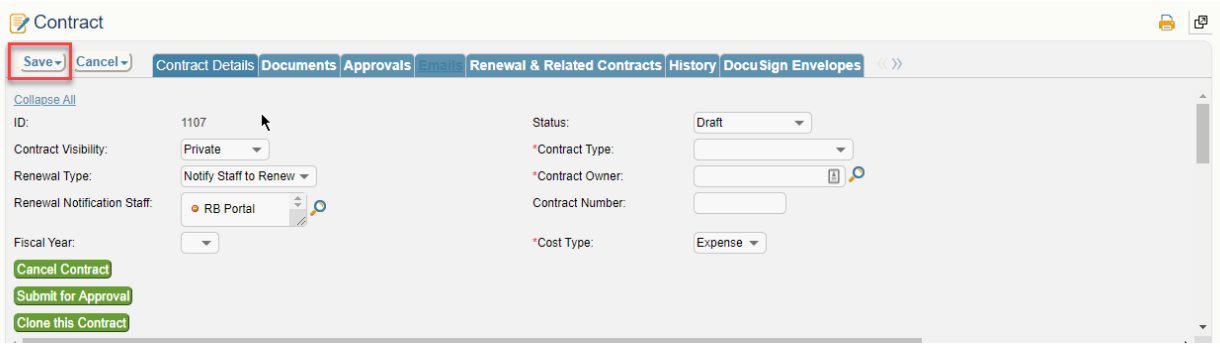
Basic Navigation

Upon logging into the system, you will be able to Submit A Contract, View Your Contracts, or View Your Department's Contracts. You can access them by either clicking the link in the middle of the page or Clicking the Tabs at the top of the page for the corresponding actions.

Submitting A Contract

To Submit A Contract, select either the Submit a Contract Link, or the Submit A Contract Tab. This will bring you to the Contract Creation screen. On this page you will fill in the fields with the appropriate metadata. Any fields with a Red * are required field. If any required fields are left blank then you will not be able to save the Contract Record. Once you are done creating the contract record or making any edits to an existing contract you can click the Save button at the top of the page.

Submit



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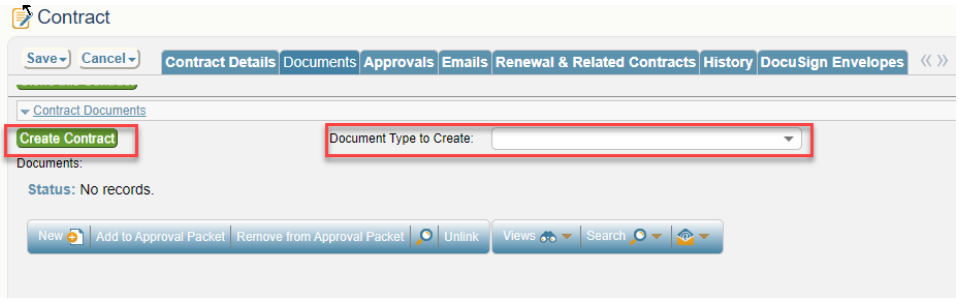
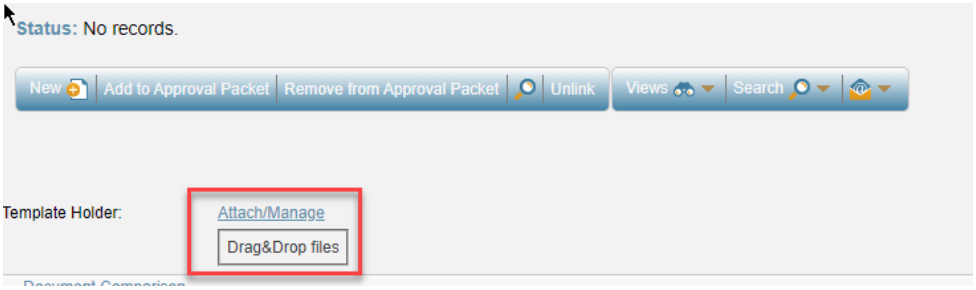
Attaching Documents

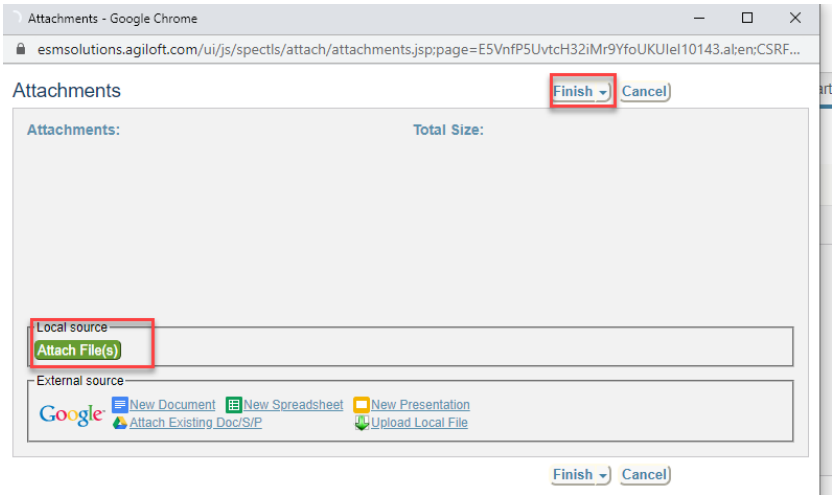
To attach documents to a record, select the Documents tab on the Contract Creation Screen. On this tab you can Create a Document Template by Selecting a Document Type to Create and Selecting the Create Contract button. This will populate a Word Document for this contract record in the table below.



You can also attach documentation by selecting the Attach/Manage Link or Dragging And Dropping the Files into the Template Holder field.



If you are using Attach/Manage you will be able to Browse your computer for the files by clicking the Attach Files button, finding your files and then selecting Finish.



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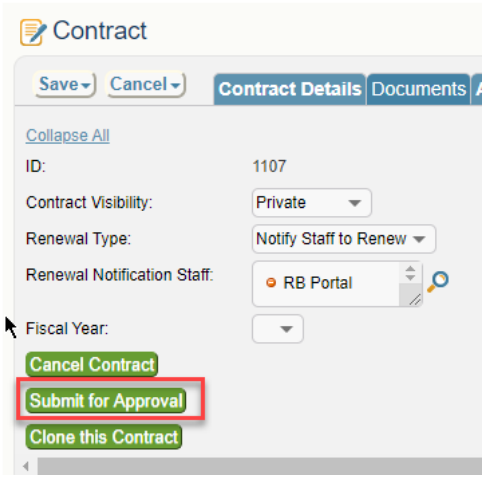
Submitting A Contract For Approval

Once all of the fields are created and all documentation is added, you can select the Submit For Approval Button to save and route the document for approval.

Submit



Approving a Contract

If you are assigned an Approval for a contract, you will receive an email from the system that you are required to Approve the record. Within the email alert there are links to Approve the record directly from the email, or Review the record in case you need to add notes or reject the record.

The contract shown below is ready for your approval. Click Approve to approve the contract and route to the next approval. Click Review to put notes into the approval record and change the Approval Status directly.

DISCLAIMER: This email has originated from a non-monitored email address. Please do not reply to this email.

Thank you!

Alternatively, from within the system, you are able to access an approval you are assigned to from within the system. Click the My Approvals tab and you will be able to view Approvals you are responsible for. To Edit the approval, click the Edit Icon, to View the approval click the ID link. If you are opening an approval in View mode to enable edit mode select the edit button at the top.

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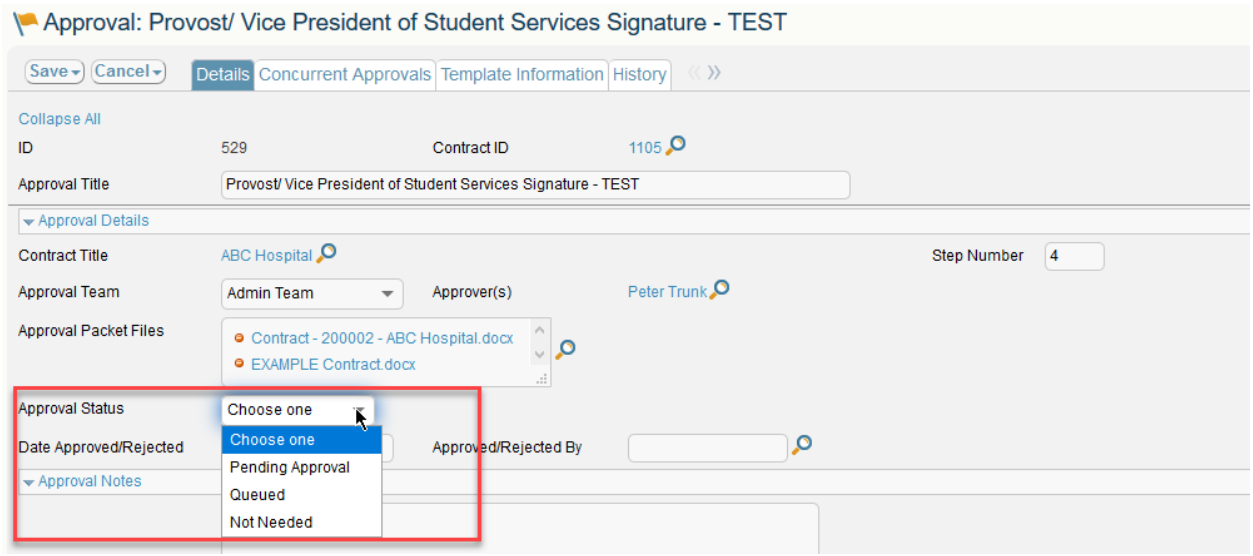
From this screen you are able to Mark the approval as Approved or Rejected. You can also leave notes in the Approval Notes field. This is required if you are Rejecting an approval. Once you make your edits to the approval, click Save to save and continue the process.



Viewing Contracts

To View Contracts, you have two options. You can either View Contracts that you are Assigned to, or you can View contracts in your Department by selecting the appropriate link or tab. You can also perform a search in the search bar in the right hand corner and filter it by either All Department Contracts or My Contracts.

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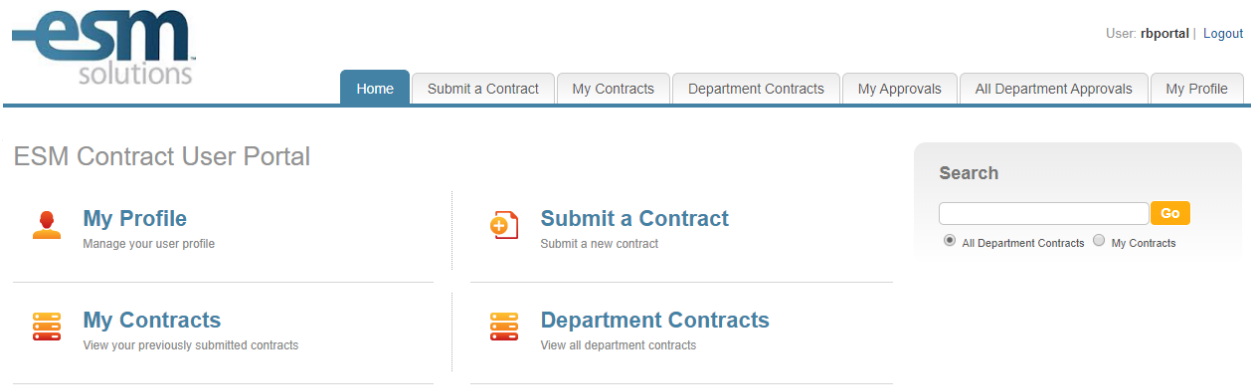
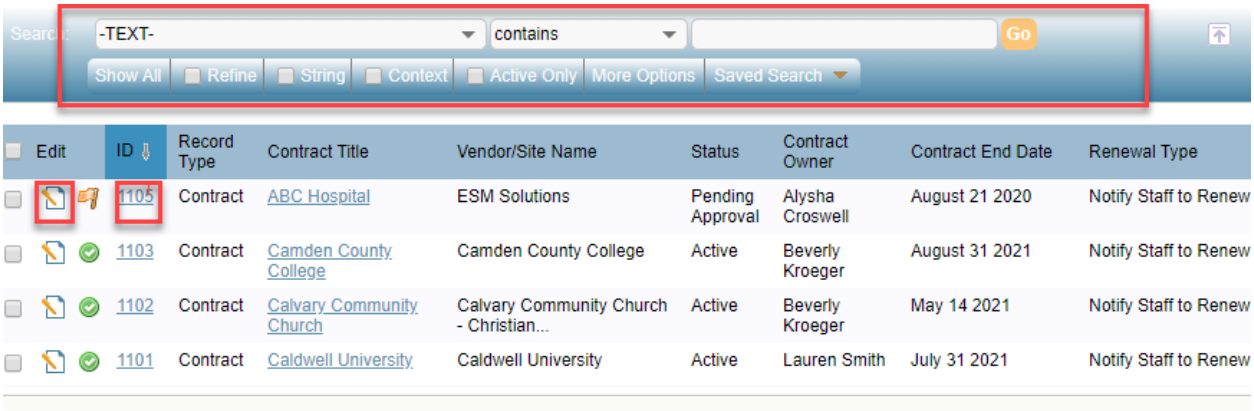


From the appropriate View, you can search to filter the contracts by a specific term, or view any of the Saved Searches that are within the system in the Search Bar above the table. To View or edit a record, select the Edit Icon or the ID. You are able to View or Edit Records that are assigned to you, HOWEVER, you can only View records assigned to other users. You are unable to edit them.



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