



# CONGA USER GUIDE

Contract Requesters

conga®

UNIVERSITY  
OF MIAMI



Revision: 5.28.2021

## Table of Contents

|   |    |
|---|----|
| Accessing Conga Contracts .....   | 2  |
| Central Contracting Units .....   | 2  |
| UM Contract Processes.....  | 2  |
| Contract Process Participants .....   | 3  |
| Contract Process Stages.....  | 3  |
| Contract Process Diagram.....   | 4  |
| Contract Requests.....  | 4  |
| Submitting a Contract Administration (Business Services) Contract Request.....                    | 5  |
| Submitting a General Counsel Contract Request .....   | 13 |
| Submitting a Business Associate Agreement or Data Processing Addendum Contract Request.....       | 23 |
| Submitting a Procurement Contract Request Using the Procurement Request Form (LIMITED USE ONLY) . | 30 |
| Submitting a Procurement Contract Request Requiring a Purchase Order .....                        | 39 |
| Workday-Conga Request Process Diagram .....   | 40 |
| Standard Request.....   | 40 |
| Additional Key Information.....   | 53 |
| Submitting an <b>I need a Review</b> Request.....   | 53 |
| Messaging .....   | 60 |
| Replying to a Message .....   | 60 |
| Help.....   | 62 |

## Accessing Conga Contracts

Conga Contracts is a secured network application that runs in an Internet browser (Chrome, Internet Explorer 9.0 (or higher), Mozilla Firefox and Safari). To open Conga Contracts, go to [conga.miami.edu](http://conga.miami.edu), or if you received an email notification from Conga, click on the 'Go to Contracts' link in the email you received from Conga.

Access to Conga Contracts is customized for each User. You will see only the records that are relevant to you and your role in the Conga contracting process. Please contact your System Administrator if you have any questions regarding your access to the system.

## Central Contracting Units

There are four central contracting units ("CCUs") at the University of Miami (UM) using Conga Contracts to manage their contracting activities:

1. Contract Administration (Business Services)
2. Office of the General Counsel
3. Purchasing (Academy and Research)
4. UHealth Supply Chain Services

## UM Contract Processes

A Contract Process in Conga is a series of pre-defined, standardized steps that ensure all contracts are being processed in the same manner. This standardization ensures that UM employees follow all the proper policies and procedures for contracts and gives UM the ability to report on key data and metrics.

There are several unique Conga Contract Processes:

1. Contract Administration (Business Services) Contract Process — For contract requests submitted to the Contract Administration team.
2. General Counsel Contract Process — For contract requests submitted to the Office of the General Counsel.
3. Privacy Contract Process — For Business Associate Agreement and Data Processing Addendum contract requests submitted to UHealth Supply Chain Services and Contract Administration, respectively.
4. Procurement Contract Process — For contract requests submitted to the Purchasing and UHealth Supply Chain Services teams
5. I Need a Review Contract Process — For requests for review or feedback submitted by another central contracting unit at UM not participating in Conga

## Contract Process Participants

Who participates in a contract process?

1. **Contract Requestor** – A UM employee who completes and submits a contract request for a contract.
2. **Contract Owner** – Individual in one of the Central Contracting Units (CCU) who is responsible for managing all activities related to processing a contract.
3. **Contract Admin** – Individual in one of the Central Contracting Units who is responsible for managing all activities related to processing a contract (in certain circumstances) and who supports Contract Owners.
4. **Department Head Approver** (*participates outside the system*) – Individual who approves a contract when requested to do so, when required, by a Contract Owner. Be aware, the Conga “Department Head” may or may not also have the University title of “Department Head.”
5. **Approver/Reviewer** – Individual who approves a contract during the contracting process; approvals are triggered automatically due to a specific response to a request form question or they are requested specifically by Contract Owners.
6. **Final Approver** – Individual who approves a contract at the end of the contracting process prior to obtaining signatures.
7. **Review Owner** – Individual who reviews a contract that has been requested on behalf of another Central Contracting Unit not participating in Conga.

## Contract Process Stages

Although each UM Contract Process is unique, they all generally consist of the following stages (not necessarily in this order):

1. Contract Request
2. Contract Request Acceptance/Approval
3. Pre-Contract Activities (including Department Head Approval)
4. Automatic Approvals
5. Additional Approvals/Reviews
6. Contract Drafting/Review
7. Negotiation
8. Final Approval
9. COI Requirements
10. Signature and Finalization

Throughout the Contract Process there may be slight variations to the stages listed above and the steps within a specific stage. **However, if you are a participant in the process and an approval step has been assigned to you, you will receive an email notification from Conga Contracts Flow or from the Contract Owner.** Watch out for these notifications and use both the *Go to Contract* link in the email and the *Active Workflow Items* Portlet on your Conga dashboard to proactively manage and action your steps.



## Contract Process Diagram



## Contract Requests

There are six (6) **Request Forms** in Conga Contracts. Each Request Form is used for the specific circumstances outlined below. Each Request Form contains common data fields, as well as data fields that are unique to the CCU and/or the Contract Type selected.

1. **Contract Administration (Business Services) Request Form** – Use this request form to route your request to the Contract Administration team (e.g., Services Agreement (UM providing services), Observership Agreement, Master Facility Use Agreement (UM premises), Facility Use Agreement (UM premises), Photo/Filming Release, etc.)
2. **General Counsel Request Form** – Use this request form to route your request to the General Counsel Central Contracting Unit (e.g., Separation Agreement, Retirement Agreement, Settlement Agreement, etc.)
3. **Business Associate Agreement/Data Processing Addendum Request Form** – Use this request form to route your request for a Business Associate Agreement or Data Processing Addendum to Supply Chain Services and Contract Administration (Business Services), respectively.)
4. **Procurement Request Form (LIMITED USE ONLY)** – Select this form ONLY if: 1) a Workday PO is NOT needed for this request, 2) request is for Meperia item(s), or 3) directed by CCU staff.

Examples of cases in which you would use this form include: Non-Disclosure Agreement, Goods ordered through Meperia, Consignment Agreements, and Requests initiated internally by Procurement.

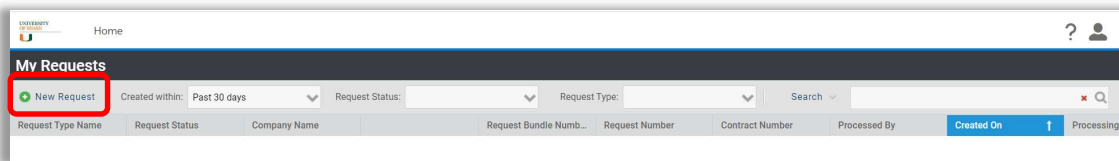
5. **Workday-Initiated Request Form** – This form is to be used for requests that have first been initiated in Workday. **This request form should never be selected directly from within Conga.** Rather, when you submit a purchase requisition in Workday that has an associated contract, your request will be automatically routed to Conga via an integration and you will receive a system email notification informing you to log into Conga where you will see a draft of the Request Form in progress in your dashboard.

**For all requests requiring a Purchase Order, the requester must initiate their request in Workday by creating a Purchase Requisition.**

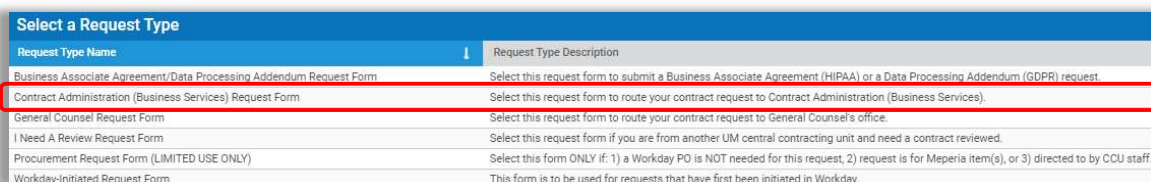
6. **I need a Review Request Form** – Select this form only if you work for a Central Contracting Unit and are making a request on behalf.

## Submitting a Contract Administration (Business Services) Contract Request

1. Log into Conga Contracts.
2. On your My Requests dashboard, click **New Request** to open the list of Request Types.



3. Select **Contract Administration (Business Services) Request Form**.



### **TIP:** *Amendments, Attachments, Statements of Work/Schedules (under a Master)*

If you are requesting an Amendment, Attachment or Statement of Work/Schedule (under a Master), be aware that you will be required to provide information regarding the master/parent agreement and/or upload the master/parent agreement to the request form. Ensure you have this information and the contract available prior to starting the request.

4. Enter the Counterparty's name in the **Company Name** field. As you begin typing the name, the system filters the full company listing and finds names that match your criteria.

- a. If the Counterparty already exists, select it.
- b. If you see the same name twice, select the value that *does not include* the extension “(Supplier Contracts ONLY)” unless you are submitting a vendor contract, in which case you should select the value that *does* contain the “(Supplier Contracts ONLY)” extension. Company Names with the “(Supplier Contracts ONLY)” extension are to be used for contracts that are processed using the two Procurement request forms only.
- c. If it does not exist and you are creating a new company, ensure that the name you enter in this field is the full legal name of the company, as it should appear in a contract and *click Add New Company*. Later in the request form, you will be required to provide additional data for the creation of a new company.

The screenshot shows the 'My Requests' section of the Conga system. The main heading is 'Contract Administration (Business Services) Request Form'. Below this, there is a 'Request Bundle Number' field with the value 'TEST-00398'. The 'Company Name' field is highlighted with a red border, and a dropdown list of company names is visible below it. The 'Browse' button is also visible.

**TIP:** You may also use the Browse button to open the full Company listing and search for the Counterparty.

5. **Complete all fields in the request form that pertain to the contract you are requesting.** The form is divided into sections. The main section contains common fields that are always visible and/or required. Data fields in sections that contain a “header” (e.g., Revenue Payment Information) only appear when the fields are relevant to the request.

**TIP:** All fields in request forms that are **required** are outlined in **red**.

**TIP:** If you tab from field to field in the request form, you will be taken first through all of Column 1 and then through Column 2.

Related Agreement is a contract to which your request relates to.

**Agreement Type** defines if a contract is a Root/Parent (e.g., Master) or Incorporated/Child (e.g., Amendment) agreement. Root agreement types are in bold. Incorporated agreement types are not. When you select an Incorporated Agreement Type, a Related Agreement Information field opens.

**Contract Type** defines the type of agreement (e.g., Services, Confidentiality). Some Contract Types have more than one level, e.g., Services Agreement (UM providing services).

Mouse over [?] to reveal **Quick Tips** regarding the data field.

Enter the information below, upload any applicable documents, and click Submit

Request Number: TEST-00398-001

[?] Contract Purpose: Services Agreement - UM providing services

Agreement Type: Standalone

Contract Type: Services Agreement (UM providing services) / Services

Will UM be sharing any UM-owned intellectual property with the counterparty?: -- No Value Selected --

**This field is required**

[?] Contract Value:   
**Contract Value**  
 This is the total, guaranteed value of the contract for the initial term. If no value, enter 0.

Proposed Expiration Date:

**Request Date** automatically populates with today's date.

Select the **University Division** and **Department** for which the contract is being requested. University Division and Department fields are linked. The value you select in University Division drives the choices in Department.

[?] Request Date: 05/11/2020

University Division: Financial Affairs

Department: -- No Value Selected --

Transaction Type:

**Revenue Payment Information**

**Security and Privacy Information**

[?] Will UM have access to protected health information or personally

Auxiliary Services  
 Cane Central  
 Contract Administration (Business Services)  
 Controller's Office  
 Enterprise Business Solutions  
 Financial Planning and Analysis  
 Managed Print Services  
 Office of the VP & CFO  
 Purchasing  
 Risk Management  
 Student Accounts  
 Travel Management  
 Treasury Operations  
 U.S. Post Office Contract Station

Some fields require that you elaborate on your answer to the prior question.

International Information

Will UM be sending or receiving products or information from outside the U.S.?:

Yes

Elaborate on products or information being sent or received from outside the U.S.:

services information will be sent outside the U.S.

Expand

Security and Privacy questions appear when applicable.

If you answer **Yes** to “*Will individually identifiable patient information be shared or accessed?*”, Conga will send you an email notification indicating you must use the Business Associate Agreement/Data Processing Addendum Request Form to request a **Business Associate Agreement**.

If you answer **Yes** to “*Will any data pertaining to individuals be transferred to or processed in the European Union under the agreement; and, do the activities under the agreement involve any data pertaining to individuals located in the European Union?*”, Conga will send you an email notification indicating you must use the Business Associate Agreement/Data Processing Addendum Request Form to request a **Data Processing Addendum**.

Watch for these email notifications!

Security and Privacy Information

Will individually identifiable patient information be shared or accessed?:

Yes

Will UM have access to protected health information or personally identifiable information?:

No

Will any data pertaining to individuals be transferred to or processed in the European Union under the agreement; and, do the activities under the agreement involve any data pertaining to individuals located in the European Union?:

Yes

Use the **Additional Relevant Information** field to capture any additional information about the contract you are requesting that was not captured above.

Additional Contract Information

Additional Relevant Information:

Expand

6. Complete all fields in the request form that pertain to the **Counterparty**.

Enter contact details for your main point of contact at the Counterparty in the **Counterparty Contact Information** data fields.

**Counterparty Contact Information**

 Counterparty Contact Name:

Counterparty Contact Email:

Counterparty Contact Phone Number:

If the Counterparty is **new**, you are required to complete the data fields in the **Counterparty Company Information** section.

*If you selected an existing company, the data fields in the Counterparty Company Information section are disabled.*

**Counterparty Company Information**

Company Address Line 1:

Company Address Line 2:

Company City:

Company State:  ▼

Company Postal Code:

Company Country:  ▼



Company Phone Number:

Company Web Address:

7. In the **Documents** section, you may upload all documents related to your request.
  - a. UM always prefers to draft the contract. However, if the Counterparty has provided a draft, the draft provided
  - b. Supporting documents
  - c. Master Agreement (*if you are requesting an amendment, attachment or Statement of Work/Schedule (under a Master)*)
8. Click **Select File** to find and select the document on your computer and attach it to the request. Repeat, as needed.

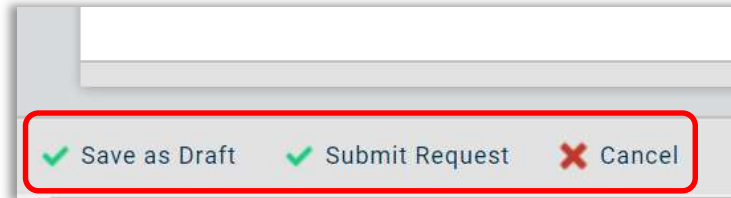
Documents

 Remove All

  Services Agreement.docx

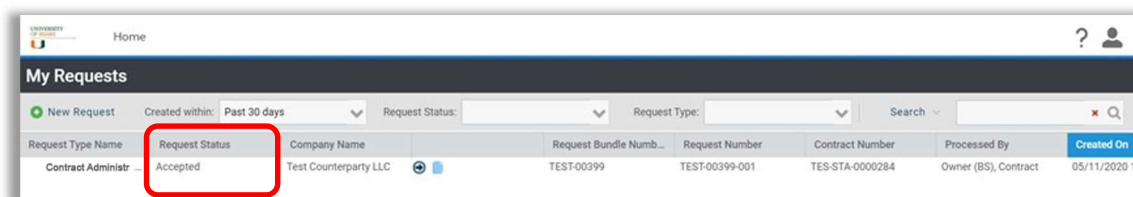
Choose file to upload: Select File...

9. Beyond the Documents section, **Additional Data Forms** with additional, unique data fields may appear based on the Contract Type you selected.
10. When you are ready to submit the request form, click **Submit Request** at the bottom of the screen. If you are not ready to submit the request form, click **Save as Draft**. The request form is saved to My Requests and you may re-open, edit and submit the request at a later time. If you want to cancel the request, click **Cancel**.



11. Upon submitting your request, you are returned to the **My Requests** screen, where you can view the status of your request.

**CRITICAL TIP:** When you submit a Contract Administration (Business Services) Request, the initial **Status** is *Submitted*. A Request Approver in the CCU will review and accept (or decline) the request. Once the request is accepted, the Request Status updates to *Accepted*. The same process applies also to requests made with the General Counsel request form. Note, however, when you submit a request using either of the two procurement request forms, the initial status is *Accepted*, because the system automatically processes the request and routes it to the relevant CCU for review.

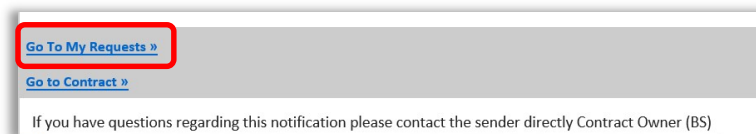



12. Once your request has been processed by a Contract Owner in Contract Administration, you will receive an **email notification** from Conga indicating that your request has been received. The email indicates who processed the request – a named User from Contract Administration.

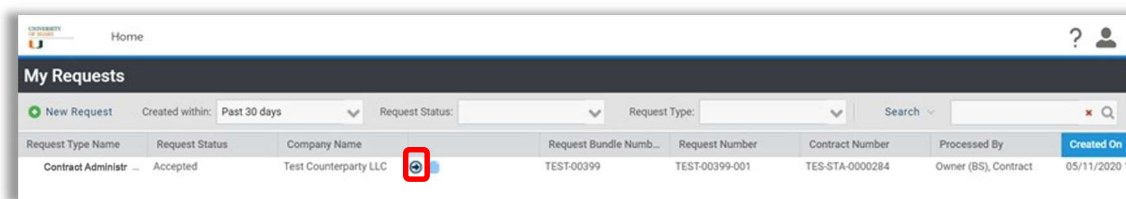


**TIP: “Received” means** that a Contract Owner in the CCU has received your request for review and evaluation. “Received” does not mean that your contract is ready or signed.

- Click on the **Go To My Requests** button at the bottom of the email notification to log back into Conga.



- Click the **Go to Contract** icon (  ) on the relevant contract in order to navigate to the Contract Profile (i.e., contract record).





15. In the Contract Profile, you can view the contract as it moves through all the **Stages** of the contract process.

The screenshot shows the 'Contract Profile - Test Counterparty LLC TES-STA-0000284' page. A red box highlights the 'Counterparty Validation' stage in the 'Pre-Contract Activities' section. Below this, the contract details are displayed in a table format.

|                   |   |                   |                       |
|-------------------|---|-------------------|-----------------------|
| Contract Group:   | B & F - Financial Affairs - Enterprise Business Solutions | Legal Entity:     | University of Miami   |
| Contract Purpose: | Services Agreement - UM providing services                | Original Company: | Test Counterparty LLC |
| Contract Number:  | TES-STA-0000284   | External Id:      |                       |
| Currency:         | USD United States of America, Dollars                     |                   |                       |
| Contract Value:   | 100,000.00  |                   |                       |
| Agreement Type:   | Standalone  |                   |                       |
| Contract Type:    | Services Agreement (UM providing services) / Services     |                   |                       |

The 'Term and Renewal' section is also visible, showing 'Term Type: Fixed - Auto Inactivate' and 'Effective Date: '.

16. You can also view the **Status** in the Term and Renewal section of the Contract Profile:

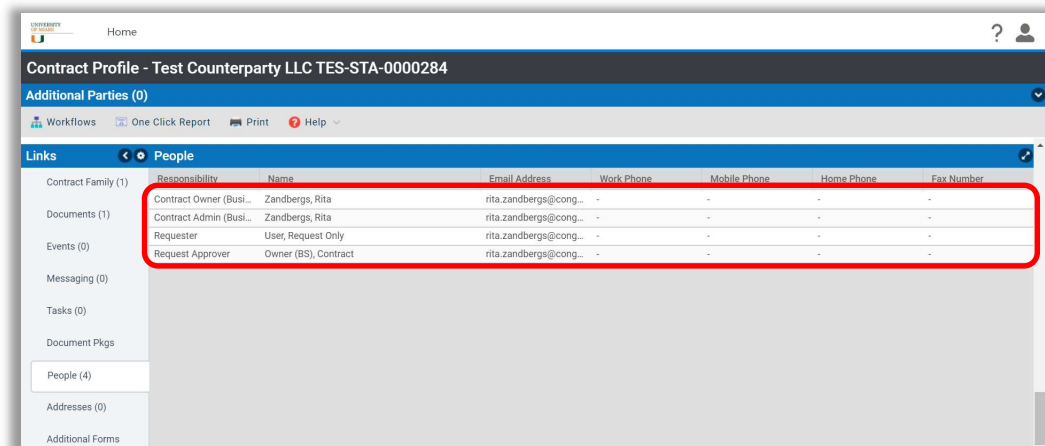
The screenshot shows the 'Contract Profile - Test Counterparty LLC TES-STA-0000284' page. A red box highlights the 'Status' field in the 'Term and Renewal' section, which is set to 'With Contract Owner'.


|                 |   |
|-----------------|---|
| Currency:       | USD United States of America, Dollars                 |
| Contract Value: | 100,000.00  |
| Agreement Type: | Standalone  |
| Contract Type:  | Services Agreement (UM providing services) / Services |

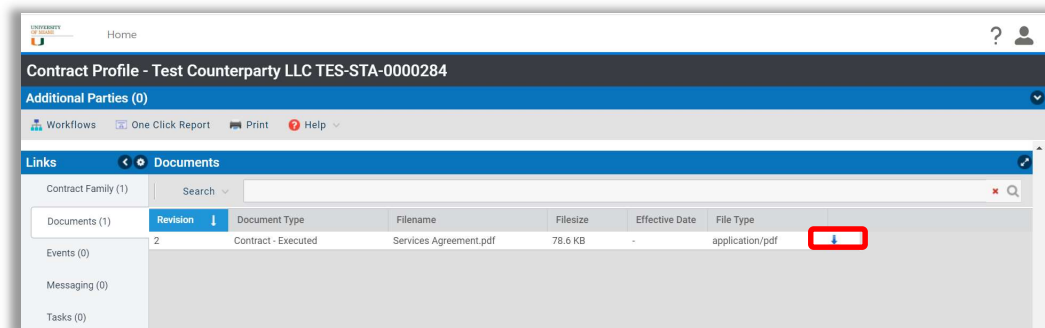
The 'Term and Renewal' section shows the following details:

- Term Type: Fixed - Auto Inactivate
- Effective Date:
- Original Exp Date:
- Current Exp Date:
- Renewal Interval (months):
- Notice Period:
- Notice Date:
- Status: With Contract Owner

17. Scroll down to the **Links** section of the profile to view additional information about the contract.
  - a. The name of the *Contract Owner* and other users associated with the contract are listed under **People**.



- b. When the contract process has been completed, you will receive an email notification from Conga informing you that the contract has been signed and is now active. The signed contract is stored in **Documents**. Click on the link in the email notification to log into Conga, go to Documents and use the Blue Arrow icon (  ) to download the document if you wish.



18. During the contracting process, you may receive email communications through the Messaging tool from the Contract Owner, including requests to provide additional information, review the contract and/or send it to the Counterparty. Additional information regarding the Messaging tool can be found here: [Messaging](#).

## Submitting a General Counsel Contract Request

1. Log into Conga Contracts.
2. On your My Requests dashboard, click **New Request** to open the list of Request Types.

### 3. Select **General Counsel Request Form**.

| Request Type Name  | Request Type Description   |
|--|--|
| Business Associate Agreement/Data Processing Addendum Request Form | Select this request form to submit a Business Associate Agreement (HIPAA) or a Data Processing Addendum (GDPR) request.                      |
| Contract Administration (Business Services) Request Form           | Select this request form to route your contract request to Contract Administration (Business Services).                                      |
| <b>General Counsel Request Form</b>                                | <b>Select this request form to route your contract request to General Counsel's office.</b>  |
| I Need A Review Request Form                                       | Select this request form if you are from another UIM central contracting unit and need a contract reviewed.                                  |
| Procurement Request Form (LIMITED USE ONLY)                        | Select this form ONLY if: 1) a Workday PO is NOT needed for this request, 2) request is for Meperia item(s), or 3) directed to by CCU staff. |
| Workday-Initiated Request Form                                     | This form is to be used for requests that have first been initiated in Workday.  |

#### **TIP: Related Agreements**

If you are requesting a contract related to another matter requiring legal review, be aware that you will be required to provide information regarding the related matter. Ensure you have this information prior to starting the request.

#### **TIP: Amendments, Attachments, Statements of Work/Schedules (under a Master)**

If you are requesting an Amendment, Attachment or Statement of Work/Schedule (under a Master), be aware that you will be required to provide information regarding the master/parent agreement and/or upload the master/parent agreement to the request form. Ensure you have this information and the contract available prior to starting the request.

4. Enter the Counterparty's name in the **Company Name** field. As you begin typing the name, the system filters the full company listing and finds names that match your criteria.
  - a. If the Counterparty already exists, select it.
  - b. If you see the same name twice, select the value that *does not include* the extension "(Supplier Contracts ONLY)". Company Names with this extension are to be used for contracts that are processed using either of the two Procurement request forms only.
  - c. If it does not exist and you are creating a new company, ensure that the name you enter in this field is the full legal name of the company, as it should appear in a contract and *click Add New Company*. Later in the request form, you will be required to provide additional data for the creation of a new company.

The screenshot shows the 'My Requests' page with the 'General Counsel Request Form'. The 'Company Name' field is highlighted with a red border, and the 'Browse' button is visible next to it. The form includes a 'Request Bundle Number' field with the value 'WILL-00401'.

**TIP:** You may also use the **Browse** button to open the full Company listing and search for the Counterparty.

5. **Complete all fields in the request form that pertain to the contract you are requesting.** The form is divided into sections. The main section contains common fields that are always visible and/or required. Data fields in sections that contain a “header” (e.g., Revenue Payment Information) only appear when the fields are relevant to the request.

**TIP:** All fields in request forms that are **required** are outlined in **red**.

**TIP:** If you tab from field to field in the request form, you will be taken first through all of Column 1 and then through Column 2.

**Agreement Type** defines if a contract is a Root/Parent (e.g., Master) or Incorporated/Child (e.g., Amendment) agreement. Root agreement types are in bold. Incorporated agreement types are not. When you select an Incorporated Agreement Type, a Related Agreement Information field opens.

**Contract Type** defines the type of agreement (e.g., Employment, Separation, Retirement). Some Contract Types have more than one level, e.g., Services Agreement (UM providing services). Ensure you select a sub-type to the lowest possible level, if required.

The screenshot shows the 'Contract Information' section of the request form. The 'Agreement Type' and 'Contract Type' fields are highlighted with a red border. A red arrow points to the '?' icon next to the 'Contract Value' field, which is also highlighted with a red border. The 'Contract Value' field has a tooltip that reads: 'This is the total, guaranteed value of the contract for the initial term. If no value, enter 0.' The 'Proposed Expiration Date' field is also visible, along with the 'University Division' dropdown menu.

Mouse over [?] to reveal **Quick Tips** regarding the data field.

Select the **University Division** and **Department** for which the contract is being requested. University Division and Department fields are linked. The value you select in University Division drives the choices in Department.

Contract Value: 0.00

Proposed Expiration Date:

University Division: MSOM/UHealth

Department: Chief Innovation Office

Transaction Type:

Counterparty Contact Information

Counterparty Contact Name:

Counterparty Contact Email:

Counterparty Contact Phone Number:

**Request Date** automatically populates with today's date.

Request Date: 05/12/2020

Due Date/Turnaround Time: Within 1 week; by 5/19/2020

The **General Counsel** Request Form contains a list of unique questions, all of which are required, except when your Contract Type is Separation Agreement or Retirement Agreement.

General Counsel Information

Is this in connection with a settlement?: No

Is this in connection with new employment?: Yes

Is this in connection with a new business relationship venture?: No

Is this in connection with property acquisition?: No

Is this in connection with a medical practice acquisition?: No

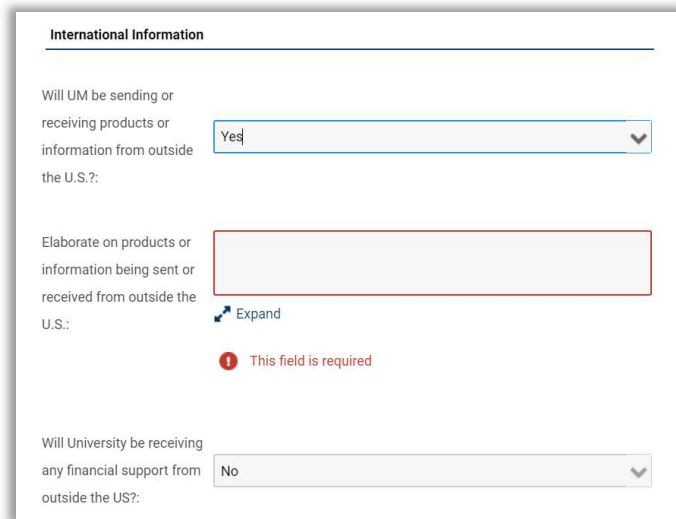
When you answer “**Yes**” to any of the **General Counsel questions**, you are required to provide additional details.

If you answered yes to any of these questions, please provide additional details:

Enter additional details here

Expand

Some fields require that you elaborate on your answer to the prior question.



**International Information**

Will UM be sending or receiving products or information from outside the U.S.?:

Elaborate on products or information being sent or received from outside the U.S.:  [Expand](#)

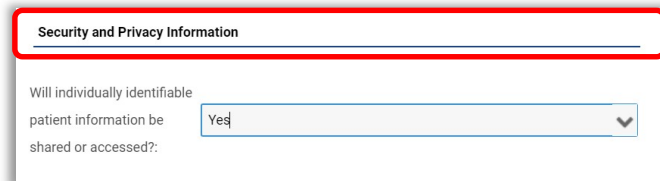
! This field is required

Will University be receiving any financial support from outside the US?:

**Security and Privacy** questions appear, when applicable.

If you answer **Yes** to “*Will individually identifiable patient information be shared or accessed?*”, Conga will send you an email notification indicating you must use the Business Associate Agreement/Data Processing Addendum Request Form to request a **Business Associate Agreement**.

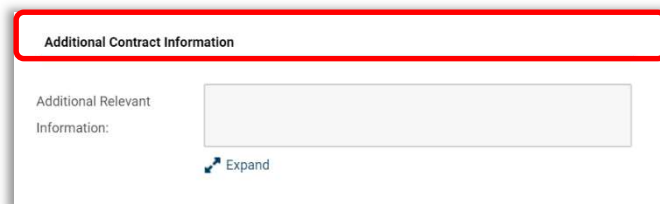
Watch for the email notification!



**Security and Privacy Information**

Will individually identifiable patient information be shared or accessed?:

Use the **Additional Relevant Information** field to capture any additional information about the contract you are requesting that was not captured above.



**Additional Contract Information**

Additional Relevant Information:  [Expand](#)

6. Complete all fields in the request form that pertain to the **Counterparty**.

Enter contact details for your main point of contact at the Counterparty in the **Counterparty Contact Information** data fields.

If the Counterparty is **new**, you are required to complete the data fields in the **Counterparty Company Information** section.

*If you selected an existing company, the data fields in the Counterparty Company Information section are disabled.*

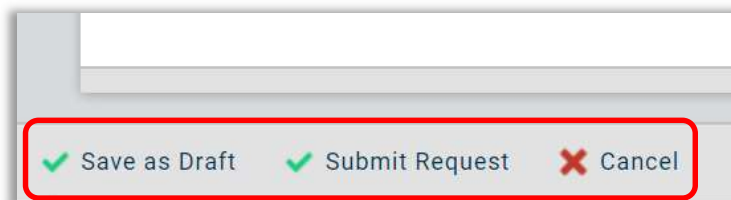
Complete the additional fields in this section when creating a new Counterparty.

7. In the **Documents** section, you may upload all documents related to your request.
  - a. UM always prefers to draft the contract. However, if the Counterparty has provided a draft, the draft provided
  - b. Supporting documents
  - c. Existing Agreement (*if you are requesting an amendment, attachment or Statement of Work/Schedule (under a Master)*)
8. To upload a document, click **Select File** to find and select the document on your computer and attach it to the request. Repeat, as needed.

9. Beyond the Documents section of the request, **Additional Data Forms** with additional, unique data fields appear based on the Contract Type you selected. For example, if you selected Separation Agreement, the Separation/Retirement Agreement form opens. Complete all additional fields, as required.

- a. **Separation/Retirement Agreement Additional Data Form**

10. When you are ready to submit the request form, click **Submit Request** at the bottom of the screen. If you are not ready to submit the request form, click **Save as Draft**. The request form is saved to My Requests and you may re-open, edit and submit the request at a later time. If you want to cancel the request, click **Cancel**.



11. Upon submitting your request, you are returned to the **My Requests** screen, where you can view the status of your request.

**CRITICAL TIP:** When you submit a General Counsel Request, the initial status is *Submitted*. A Request Approver in the CCU will review and accept (or decline) the request. Once the request is accepted, the Request Status updates to *Accepted*.

| Request Type Name     | Request Status | Company Name          | Request Bundle Number | Request Number | Contract Number | Processed By         | Created On   |
|-----------------------|----------------|-----------------------|-----------------------|----------------|-----------------|----------------------|--------------|
| General Counsel Re... | Accepted       | Williams, Andrew      | WILL-00402            | WILL-00402-001 | WIL-STA-0000286 | Zandbergs, Rita      | 05/12/2020 1 |
| Contract Administr... | Accepted       | Test Counterparty LLC | TEST-00399            | TEST-00399-001 | TES-STA-0000284 | Owner (BS), Contract | 05/11/2020 1 |



12. Once your request has been processed by a Contract Owner in the General Counsel office, you will receive an **email notification** from Conga indicating that your request has been received. The email indicates who processed the request – a named User from the General Counsel office.

Conga Contracts Request

## Request Received

**Williams, Andrew**

Your request has been received by Rita Zandbergs (rita.zandbergs@conga.com). You can view the details by going to Requests under the Contract tab or by clicking the link below.

|                  |                      |
|------------------|----------------------|
| Requested By     | Request Only User    |
| Approved By      | Rita Zandbergs       |
| Company Name     | Williams, Andrew     |
| Contract Purpose | Employment Agreement |
| Agreement Type   | Standalone           |
| Contract Type    | Employment Agreement |
| Contract Value   | 0.00                 |

[Go To My Requests »](#)  
[Go to Contract »](#)

If you have questions regarding this notification please contact the sender directly Rita Zandbergs (rita.zandbergs@conga.com). For technical assistance with the request process, you can email support. This is


**TIP: Received means** that a Contract Owner in the CCU has received your request for review and evaluation, and that status of the Request is now *Accepted*. **Received does not mean** that your contract is ready or signed.

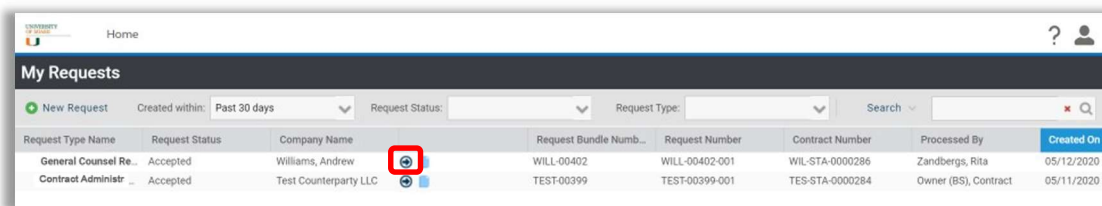
13. Click on the **Go To My Requests** button at the bottom of the email notification to log back into Conga.

[Go To My Requests »](#)

[Go to Contract »](#)

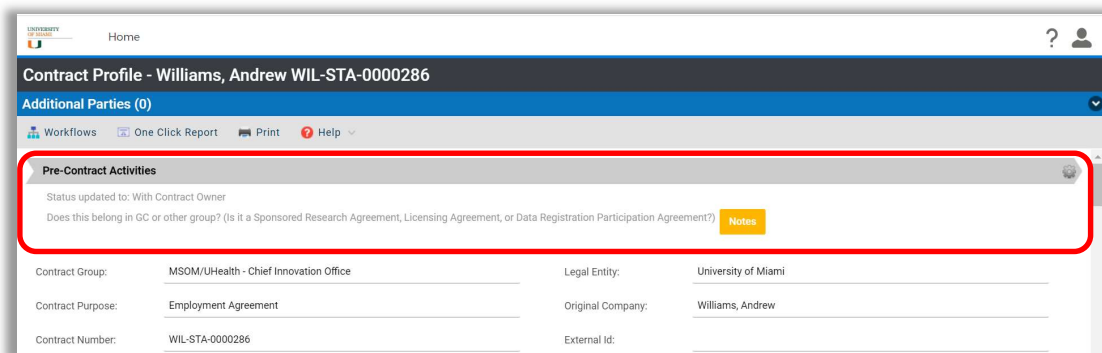
If you have questions regarding this notification please contact the sender directly Rita Zandbergs (rita.zandbergs@conga.com). For technical assistance with the request process, you can email support. This is not a promotional announcement. This message was sent on behalf of Rita Zandbergs (rita.zandbergs@conga.com)

14. Click the **Go to Contract** icon (  ) on the relevant Request to go to the Contract Profile (i.e., contract record).



| Request Type Name     | Request Status | Company Name          | Request Bundle Numb... | Request Number | Contract Number | Processed By         | Created On   |
|-----------------------|----------------|-----------------------|------------------------|----------------|-----------------|----------------------|--------------|
| General Counsel Re... | Accepted       | Williams, Andrew      | WILL-00402             | WILL-00402-001 | WIL-STA-0000286 | Zandbergs, Rita      | 05/12/2020 1 |
| Contract Administr... | Accepted       | Test Counterparty LLC | TEST-00399             | TEST-00399-001 | TES-STA-0000284 | Owner (BS), Contract | 05/11/2020 1 |

15. In the Contract Profile you can view the contract as it moves through all the **Stages** of the contract process.



**Contract Profile - Williams, Andrew WIL-STA-0000286**

**Additional Parties (0)**

Workflows One Click Report Print Help

**Pre-Contract Activities**

Status updated to: With Contract Owner

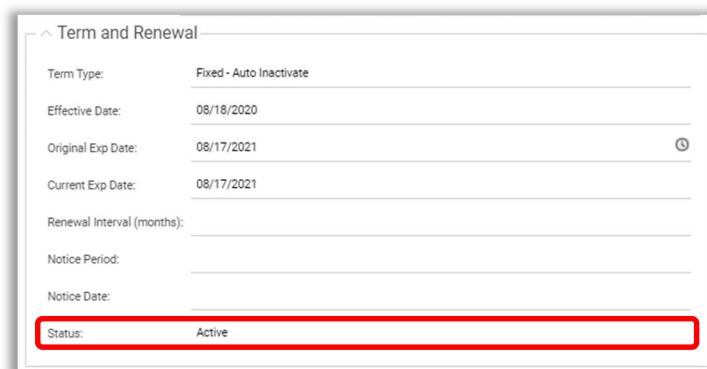
Does this belong in GC or other group? (Is it a Sponsored Research Agreement, Licensing Agreement, or Data Registration Participation Agreement?) [Notes](#)

Contract Group: MSOM/UHealth - Chief Innovation Office Legal Entity: University of Miami

Contract Purpose: Employment Agreement Original Company: Williams, Andrew

Contract Number: WIL-STA-0000286 External Id:

16. In the Term and Renewal section of the Contract Profile, you can view the **Status** of the contract.



**Term and Renewal**

Term Type: Fixed - Auto Inactivate

Effective Date: 08/18/2020

Original Exp Date: 08/17/2021

Current Exp Date: 08/17/2021

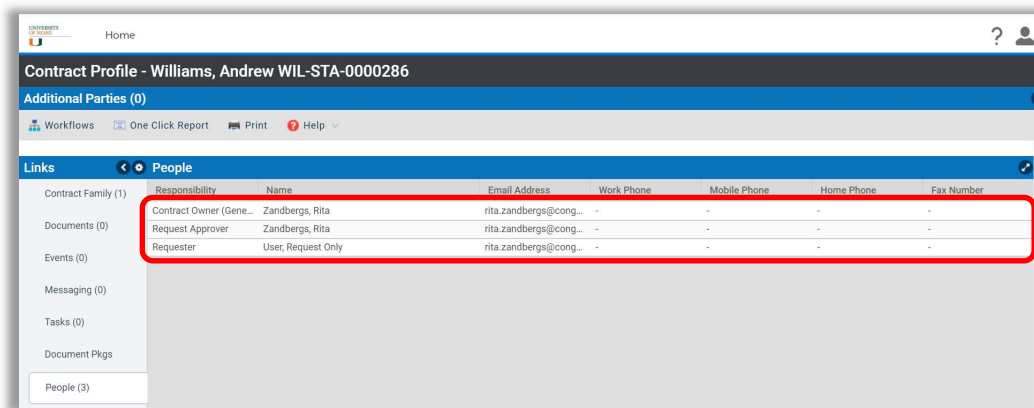
Renewal Interval (months):


Notice Period:

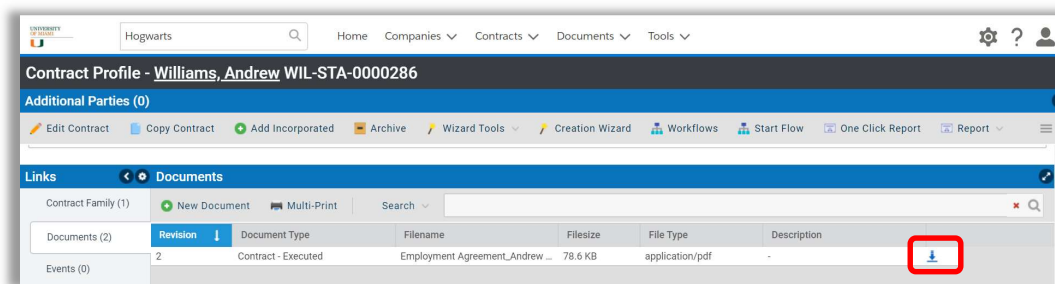
Notice Date:

**Status: Active**

17. Scroll down to the **Links** section of the profile to view additional information about the contract.
  - a. The name of the *Contract Owner* and other users associated with the contract are listed under **People**.



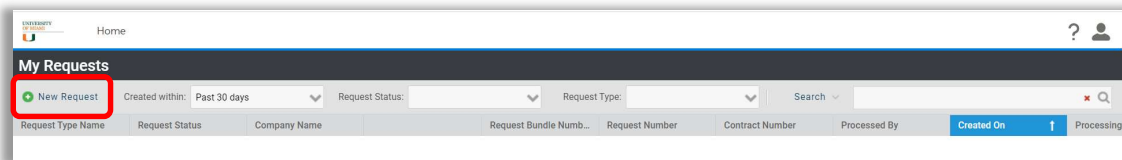
- b. When the contract process has been completed, you will receive an email notification from Conga informing you that the contract has been signed and is now active. The signed contract is stored in **Documents**. Click on the link in the email notification to log into Conga, go to Documents and use the Blue Arrow icon (  ) to download the document.



18. During the contracting process, you may receive email communications through the Messaging tool from the Contract Owner to provide additional information, review the contract and/or send it to the Counterparty. Additional information regarding the Messaging tool is found here: [Messaging](#).

## Submitting a Business Associate Agreement or Data Processing Addendum Contract Request

1. Log into Conga Contracts.
2. On your My Requests dashboard, click **New Request** to open the list of Request Types.



3. Select **Business Associate Agreement/Data Processing Addendum Request Form**.

| Select a Request Type  |  |
|--|--|
| Request Type Name  | Request Type Description   |
| Business Associate Agreement/Data Processing Addendum Request Form | Select this request form to submit a Business Associate Agreement (HIPAA) or a Data Processing Addendum (GDPR) request.                      |
| Contract Administration (Business Services) Request Form           | Select this request form to route your contract request to Contract Administration (Business Services).                                      |
| General Counsel Request Form                                       | Select this request form to route your contract request to General Counsel's office.   |
| I Need A Review Request Form                                       | Select this request form if you are from another UM central contracting unit and need a contract reviewed.                                   |
| Procurement Request Form (LIMITED USE ONLY)                        | Select this form ONLY if: 1) a Workday PO is NOT needed for this request, 2) request is for Meperia item(s), or 3) directed to by CCU staff. |
| Workday-Initiated Request Form                                     | This form is to be used for requests that have first been initiated in Workday.  |

### TIP: Related Agreements

If you are requesting a contract related to another contract, be aware that you will be required to provide information regarding the related agreement and/or if already executed, to upload the related agreement to the request form. Ensure you have this information and the agreement/information about the agreement prior to starting the request.

4. Enter the Counterparty's name in the **Company Name** field. As you begin typing the name, the system filters the full company listing and finds names that match your criteria.
  - a. If the Counterparty already exists, select it.
  - b. If you see the same name twice, select the value that *does not include* the extension "(Supplier Contracts ONLY)". Company Names with this extension are to be used for contracts that are processed using either of the two Procurement request forms only.
  - c. If it does not exist and you are creating a new company, ensure that the name you enter in this field is the full legal name of the company, as it should appear in a contract and *click Add New Company*. Later in the request form, you will be required to provide additional data for the creation of a new company.

The screenshot shows the 'My Requests' section of the Conga system. The main heading is 'Business Associate Agreement/Data Processing Addendum Request Form'. Below this, there's a sub-heading: 'Select this request form to submit a Business Associate Agreement (HIPAA) or a Data Processing Addendum (GDPR) request.' A 'Request Bundle Number' field contains 'TEST-00412'. The 'Company Name' field is highlighted with a red box, and a dropdown menu is open showing a list of companies. The list includes 'Test - Add New Company', 'BETA TEST CO., Inc.', 'Rachel's Test Company', 'Rita's Test Counterparty', 'Test Company AAA', 'Test Company ABC', 'Test Company Inc.', 'Test Company LLC' (which is highlighted with a red box), 'Test Counterparty LLC', 'Test Karl Counterparty', and 'Test Rita Counterparty'. A 'Browse' button is visible to the right of the dropdown.

**TIP:** You may also use the **Browse** button to open the full Company listing and search for the Counterparty.

5. **Complete all fields in the request form that pertain to the contract you are requesting.** The form is divided into sections. The main section contains common fields that are always visible and/or required. Data fields in sections that contain a “header” only appear when the fields are relevant to the request.

**TIP:** All fields in request forms that are **required** are outlined in **red**.

**TIP:** If you tab from field to field in the request form, you will be taken first through all of Column 1 and then to Column 2.

Select the **University Division** and **Department** for which the contract is being requested. University Division and Department fields are linked. The value you select in University Division drives the choices in Department.

Provide details regarding the contract your request relates to in the **Related Agreement Information** field.

The screenshot shows the 'Contract Information' section of the request form. It includes fields for 'Contract Purpose' (Data processing addendum for vendor who will have access to international student data), 'Contract Type' (Data Processing Agreement), 'University Division' (Enrollment Management), and 'Department' (No Value Selected -). The 'Department' dropdown menu is open, showing a list of departments: 'International Student and Scholar Services', 'Office of Student Financial Assistance and Employment' (which is highlighted with a blue bar), 'Office of Undergraduate Admission', and 'VP of Enrollment Management'. The 'Related Agreement Information' field is highlighted with a red box and has a red outline. A red message 'This field is required' is displayed below it. The 'Additional Relevant Information' field is also highlighted with a red box and has a red outline. A red arrow points from the text 'Provide details regarding the contract your request relates to in the Related Agreement Information field.' to the 'Related Agreement Information' field.

**Request Date** automatically populates with today's date.

Some fields require that you elaborate on your answer to the prior question.

**Security and Privacy Information**

Will UM have access to protected health information or personally identifiable information of the counterparty?: No

Will Counterparty have access or be exposed to protected health information or personally identifiable information?: Yes

Description of data that Counterparty will have access or exposure to: Relevant data points are: first name and last name, date of birth, passport or visa number, and email address.

Expand

The **Business Associate Agreement/Data Processing Addendum Request Form** contains unique data fields that are required when requesting a Business Associate Agreement or Data Processing Addendum.

**Services** is the unique data field section that is required when requesting a **Business Associate Agreement**.

**Services (information only applicable for Business Associate Agreements)**

Has a security risk assessment been completed by IT?: Yes

If this is a vendor that is providing a product or service to UM, is it the only vendor who can provide this product or service?: No

Some fields are multi-select and allow you to select more than one answer. Select all that apply.

Make sure you upload documents to the **Documents** section of the request form, when requested to do so.

**Purpose for the Collection of the Data**

**About the Data**

Type of individually identifiable patient information you expect to be disclosed: Name, Full postal address, City, State, Zip code, Street address, Full dates

Upload Data Collection Sheet below in Documents

Purpose of disclosure / access to identifiable information: [Text Field]

Expand

This field is required

The **GDPR** section is required. The first question is multi-select and allows you to select more than one answer. Select all that apply.

Some fields require that you elaborate on your answer to the prior question.

**General Data Protection Regulation ("GDPR")**

Is the vendor located in any of the following European countries?: None  
 Austria  
 Belgium  
 Bulgaria  
 Croatia  
 Cyprus  
 Czechia

Will the data collected otherwise include information from individuals located in any of the above European countries?: Yes

Elaborate on data collected otherwise including information from individuals located in the EU or EEA: Expand  
 Relevant data points are: first name and last name, date of birth, passport or visa number, and email address.

## 6. Complete all fields in the request form that pertain to the **Counterparty**.

Enter contact details for your main point of contact at the Counterparty in the **Counterparty Contact Information** data fields.

**Counterparty Contact Information**

Counterparty Contact Name: Elaine Smith

Counterparty Contact Email: esmith@testcolic

Counterparty Contact Phone Number: 617-555-1111

If the Counterparty is **new**, you are required to complete the data fields in the **Counterparty Company Information** section.

*If you selected an existing company, the data fields in the Counterparty Company Information section are disabled.*

Complete the additional fields in this section when creating a new Counterparty.

**Counterparty Company Information**

Company Address Line 1: 100 Main Street

Company Address Line 2:

Company City: Franklin

Company State: Massachusetts

Company Postal Code: 02038

Company Country: United States

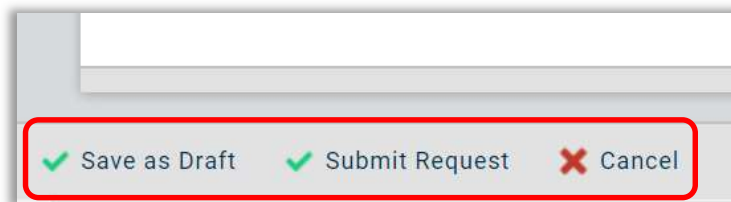
Company Phone Number:

Company Web Address:

7. In the **Documents** section, you may upload all documents related to your request.
  - a. UM always prefers to draft the contract. However, if the Counterparty has provided a draft, the draft provided
  - b. Supporting documents
  - c. Agreement that relates to your submission
8. To upload a document, click **Select File** to find and select the document on your computer and attach it to the request. Repeat, as needed.



9. When you are ready to submit the request form, click **Submit Request** at the bottom of the screen. If you are not ready to submit the request form, click **Save as Draft**. The request form is saved to My Requests and you may re-open, edit and submit the request at a later time. If you want to cancel the request, click **Cancel**.



10. Upon submitting your request, you are returned to the **My Requests** screen, where you can view the status of your request.

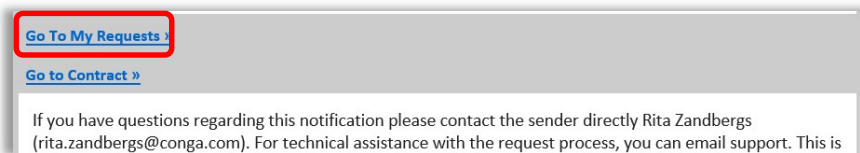
**CRITICAL TIP:** When you submit a Business Associate Agreement/Data Processing Addendum Request, the initial status is *Accepted*, because the system automatically processes it and routes it to the relevant group (Supply Chain or Contract Administration) for review.


11. Once your request is processed by the system, you also receive an email notification from Conga indicating that your request has been received.

**TIP: Received means** that a Contract Owner in the CCU has received your request for review and evaluation, and that status of the Request is *Accepted*. **Received/Accepted does not mean** that your contract has been reviewed or is ready or signed.



12. Click on the **Go To My Requests** button at the bottom of the email notification to log back into Conga.



13. Click the **Go to Contract** icon (  ) on the relevant Request to go to the Contract Profile (i.e., contract record).

| Request Type Name     | Request Status | Company Name          | Request Bundle Number | Request Number | Contract Number | Processed By         | Created On   |
|-----------------------|----------------|-----------------------|-----------------------|----------------|-----------------|----------------------|--------------|
| Privacy Request Fo... | Accepted       | Test Counterparty LLC | TEST-00412            | TEST-00412-001 | TES-STA-0000287 | Zandbergs, Rita      | 05/13/2020 1 |
| General Counsel Re... | Accepted       | Williams, Andrew      | WILL-00402            | WILL-00402-001 | WIL-STA-0000286 | Zandbergs, Rita      | 05/12/2020 1 |
| Contract Administr... | Accepted       | Test Counterparty LLC | TEST-00399            | TEST-00399-001 | TES-STA-0000284 | Owner (BS), Contract | 05/11/2020 1 |

14. In the Contract Profile, you can view the contract as it moves through all the **Stages** of the contract process.

Contract Profile - Test Counterparty LLC TES-STA-0000287

Additional Parties (0)

Workflows One Click Report Print Help

**Pre-Contract Activities** Contract Drafting/Assignment

Status updated to: With Privacy Contract Admin  
Are you generating a UM template? [Notes](#)

|                   |                              |                   |                       |
|-------------------|------------------------------|-------------------|-----------------------|
| Contract Group:   | Privacy                      | Legal Entity:     | University of Miami   |
| Contract Purpose: | Business Associate Agreement | Original Company: | Test Counterparty LLC |
| Contract Number:  | TES-STA-0000287              | External Id:      |                       |

15. In the Term and Renewal section of the Contract Profile, you can view the **Status** of the contract.

**Term and Renewal**

Term Type: Fixed - Auto Inactivate

Effective Date: 08/18/2020

Original Exp Date: 08/17/2021 ⓘ

Current Exp Date: 08/17/2021

Renewal Interval (months):

Notice Period:

Notice Date:

**Status: Active**

16. Scroll down to the **Links** section of the profile to view additional information about the contract.
  - a. The name of the *Contract Owner* and other users associated with the contract are listed under **People**.


**Contract Profile - Test Counterparty LLC TES-STA-0000287**

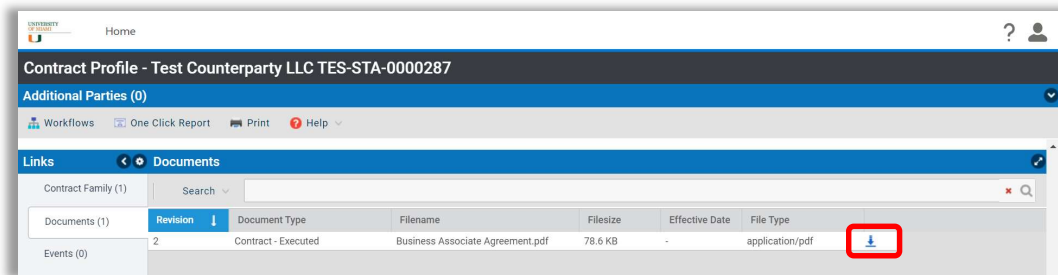
Additional Parties (0)

Workflows One Click Report Print Help

**Links** People

| Contract Family (1) | Responsibility           | Name               | Email Address          | Work Phone | Mobile Phone | Home Phone | Fax Number |
|---------------------|--------------------------|--------------------|------------------------|------------|--------------|------------|------------|
| Documents (0)       | Request Approver         | Zandbergs, Rita    | rita.zandbergs@cong... | -          | -            | -          | -          |
| Events (0)          | Contract Admin (Priva... | Zandbergs, Rita    | rita.zandbergs@cong... | -          | -            | -          | -          |
| Messaging (0)       | Requester                | User, Request Only | rita.zandbergs@cong... | -          | -            | -          | -          |
| Tasks (0)           |                          |                    |                        |            |              |            |            |
| Document Pkgs       |                          |                    |                        |            |              |            |            |
| People (3)          |                          |                    |                        |            |              |            |            |

- b. When the contract process has been completed, you will receive an email notification from Conga informing you that the contract has been signed and is now active. The signed contract is stored in **Documents**. Click on the link in the email notification to log into Conga, go to Documents and use the Blue Arrow icon (  ) to download the document.

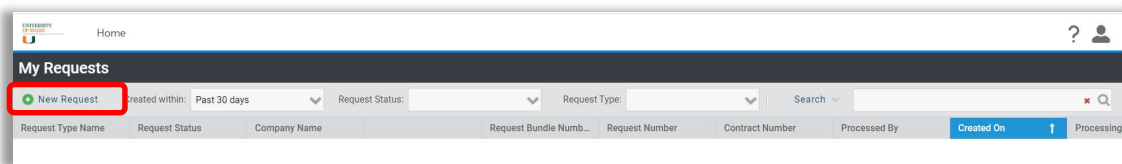


17. During the contracting process, you may receive email communications through the Messaging tool from the Contract Owner to provide additional information, review the contract and/or send it to the Counterparty. Additional information regarding the Messaging tool is found here: [Messaging](#).

## Submitting a Procurement Contract Request Using the Procurement Request Form (LIMITED USE ONLY)

Select this form ONLY if: 1) a Workday PO is NOT needed for this request, 2) your request is for Meperia item(s), or 3) you are directed to by CCU staff. This request form is used to seek contract review from Sourcing Teams within Procurement.

1. Log into Conga Contracts.
2. On your My Requests dashboard, click **New Request** to open the list of Request Types.



3. Select **Procurement Request Form (LIMITED USE ONLY)**.

| Select a Request Type  |  |
|--|--|
| Request Type Name  | Request Type Description   |
| Business Associate Agreement/Data Processing Addendum Request Form | Select this request form to submit a Business Associate Agreement (HIPAA) or a Data Processing Addendum (GDPR) request.                      |
| Contract Administration (Business Services) Request Form           | Select this request form to route your contract request to Contract Administration (Business Services).                                      |
| General Counsel Request Form                                       | Select this request form to route your contract request to General Counsel's office.   |
| I Need A Review Request Form                                       | Select this request form if you are from another UM central contracting unit and need a contract reviewed.                                   |
| Procurement Request Form (LIMITED USE ONLY)                        | Select this form ONLY if: 1) a Workday PO is NOT needed for this request, 2) request is for Meperia item(s), or 3) directed to by CCU staff. |
| Workday-initiated Request Form                                     | This form is to be used for requests that have first been initiated in Workday.  |

**TIP:** *Amendments, Attachments, Statements of Work/Schedules (under a Master)*

If you are requesting an Amendment, Attachment or Statement of Work/Schedule (under a Master), be aware that you will be required to provide information regarding the master/parent agreement and/or upload the master/parent agreement to the request form. Ensure you have this information and the contract available prior to starting the request.

4. Enter the Supplier's name in the **Company Name** field. As you begin typing the name, the system filters the full company listing and finds names that match your criteria.
  - a. You must select a Supplier with the extension "(Supplier Contracts ONLY)". If the Supplier in the list has the extension, select it.
  - b. If the Supplier with the extension "(Supplier Contracts ONLY)" does not exist, you must search for and select **TempVendor** from the Company listing. The Supplier you need has not been added yet to Conga. You also must enter the name of the Supplier in the **Intended Vendor Name** field in the request form under Procurement Information. The Contract Owner will assign the contract over to that named Supplier, once it becomes available in Conga.

**TIP:** If you are not able to locate the Supplier in Conga, unless you have done so already, please remember to submit a new vendor request in Workday. After you submit the Conga Request, the system will send you a reminder email notification stating the following: *As a reminder, when selecting "Temp Vendor", and if you have not done so already, please submit a New Supplier Request for Purchase Order form in Workday. Once the supplier has completed the form and UM has processed the application, the contract can be completed.*



**TIP:** You may also use the Browse button to open the full Company listing and search for the Counterparty.

5. **Complete all fields in the request form that pertain to the contract you are requesting.** The form is divided into sections. The main section contains common fields that are always visible and/or required. Data fields in sections that contain a "header" (e.g., Procurement Information) only appear when the fields are relevant to the request.

**TIP:** All fields in request forms that are **required** are outlined in **red**.

**TIP:** If you tab from field to field in the request form, you will be taken first through all of Column 1 and then through Column 2.

**Agreement Type** defines if a contract is a Root/Parent (e.g., Master and Standalone) or Incorporated/Child (e.g., Amendment) agreement. Root agreement types are in bold in the drop-down list. Incorporated agreement types are not. When you select an Incorporated Agreement Type, a Related Agreement Information field opens.

**Contract Type** defines the type of agreement (e.g., Services, Confidentiality). Some Contract Types have more than one level, e.g., Services Agreement (UM providing services). Ensure you select a sub-type to the lowest possible level, if required.

Mouse over [?] to reveal **Quick Tips** regarding the data field.

Enter the information below, upload any applicable documents, and click Submit F

Request Number: TEST-00414-001

[?] Contract Purpose: Purchase of MRI machines

Agreement Type: Standalone

Contract Type: Purchase Agreement (UM making purchase) / Goods

[?] Are you attaching documentation provided by Counterparty?

Counterparty is external company or individual with which you would like to do business with

This field is required

What goods and/or services are being purchased?:

Expand

If you answer **Yes** to “Are you attaching documentation provided by Counterparty?”, ensure you upload the documentation to the Documents section at the bottom of the request form.

[?] Are you attaching documentation provided by Counterparty?: Yes

What goods and/or services are being purchased?: MRI machines

Expand

Will any services be performed on university premises?: No

[?] Contract Value: 100,000.00

[?] Proposed Expiration Date:

If you answer **Yes** to “Will any data pertaining to individuals be transferred to or processed in the European Union under the agreement; and, do the activities under the agreement involve any data pertaining to individuals located in the European Union?”, Conga will send you an email notification indicating you must use the Business Associate Agreement/Data Processing Addendum Request Form to request a **Data Processing Addendum**.

Watch for this email notification!

**Request Date** defaults to the date on which you initiate the request form.

Select the **University Division** and **Department** for which the contract is being requested. University Division and Department fields are linked. The value you select in University Division drives the choices in Department.

The value you select in this field (i.e., Company 200 or Company 300s) determines the Central Contract Unit to which your request is routed.

**Security and Privacy** questions appear, when applicable.

If you answer **Yes** to “*Will individually identifiable patient information be shared or accessed?*”, Conga will send you an email notification indicating you must use the Business Associate Agreement/Data Processing Addendum Request Form to request a **Business Associate Agreement**.

Watch for this email notification!

Security and Privacy Information

Will Counterparty have access or be exposed to protected health information or personally identifiable information?:

No

Will individually identifiable patient information be shared or accessed?:

Yes

Will vendor be storing, processing, transmitting, credit card holder data, or be providing services that control or could impact the security of cardholder data?:

Yes

Procurement Information

If you are using TempVendor, because the Supplier has not yet been onboarded in Conga, you must enter the name of the supplier in the field below - Intended Vendor Name.

Intended Vendor Name:

Use the **Additional Relevant Information** field to capture any additional information about the contract you are requesting that was not captured above.

Additional Contract Information

Additional Relevant Information:

Expand

## 6. Complete **Counterparty Contact Information** data fields.

Enter contact details for your main point of contact at the Counterparty in the **Counterparty Contact Information** data fields.

Counterparty Contact Information

Counterparty Contact

Name:

Eric Smith

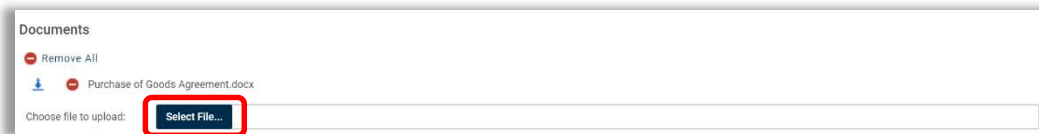
Counterparty Contact Email:

esmith@mri.com

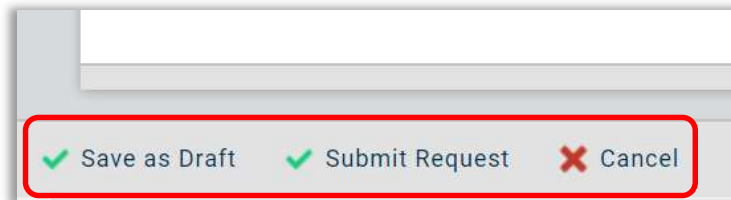
Counterparty Contact Phone Number:

617-555-2222

7. In the **Documents** section, you may upload all documents related to your request.
  - a. UM always prefers to draft the contract. However, if the Counterparty has provided a draft, the draft provided
  - b. Supporting documents
  - c. Existing Agreement (*if you are requesting an amendment, attachment or Statement of Work/Schedule (under a Master)*)
8. Click **Select File** to find and select the document on your computer and attach it to the request. Repeat, as needed.



9. When you are ready to submit the request form, click **Submit Request** at the bottom of the screen. If you are not ready to submit the request form, click **Save as Draft**. The request form is saved to My Requests and you may re-open, edit and submit the request at a later time. If you want to cancel the request, click **Cancel**.



10. Upon submitting your request, you are returned to the **My Requests** screen, where you can view the status of your request.

**CRITICAL TIP:** When you submit a Procurement Request Form (LIMITED USE ONLY), the initial **Status** is *Accepted*, because the system automatically processes it and routes it to the relevant group (Academy/200 or UHealth/300) for review. By way of comparison, when you submit Business Services or General Counsel Requests, the initial Status of the request is *Submitted*. A Request Approver in the CCU reviews and accepts (or declines) the request. Once the request is accepted, the Request Status updates to *Accepted*.



| Request Type Name                                 | Request Status | Company Name            | Request Bundle Num... | Request Number | Contract Description | Contract Number   | Processed By    | Created  |
|---|----------------|-------------------------|-----------------------|----------------|----------------------|-------------------|-----------------|----------|
| Business Associate Agreement/Data Processin...    | Accepted       | 24BY7SECURITY, INC.     | 00001095              | 00001095-01    | -                    | 24BY-MAS-00000616 | SYSTEM, ACCOUNT | 04/15/20 |
| Business Associate Agreement/Data Processin...    | Accepted       | FINANCIAL AID SERVIC... | 00001066              | 00001066-01    | -                    | FINA-MAS-00000606 | SYSTEM, ACCOUNT | 04/05/20 |
| Contract Administration (Business Services) Re... | Submitted      | SALARY.COM LLC          | 00001068              | 00001068-01    | -                    | -                 | -               | 04/05/20 |
| Workday Initiated Request Form                    | Accepted       | STRYKER SALES CORP      | 00001108              | 00001108-01    | -                    | STRV-STA-00000621 | SYSTEM, ACCOUNT | 04/15/20 |
| Procurement Request Form (LIMITED USE ONLY)       | Accepted       | STRYKER SALES CORP      | 00001096              | 00001096-01    | -                    | STRV-STA-00000617 | SYSTEM, ACCOUNT | 04/15/20 |
| General Counsel Request Form                      | Submitted      | Williams, Andrew        | 00001062              | 00001062-01    | -                    | -                 | -               | 04/05/20 |

**TIP:** You may need to refresh the My Requests screen in order to refresh the Request Status of the Procurement Request from Submitted to Accepted.

- Once Accepted your request has been processed by the system, you will receive an **email notification** from Conga indicating that your request has been received by Account System.

## Conga Contracts Request

### Request Received

**Test MRI Company**

Your request has been received by ACCOUNT SYSTEM (systemaccount@novatusinc.com). You can view the details by going to Requests under the Contract tab or by clicking the link below.

| Requested By     | Request Only User                               |
|------------------|---|
| Approved By      | ACCOUNT SYSTEM                                  |
| Company Name     | Test MRI Company                                |
| Contract Purpose | Purchase of MRI machines                        |
| Agreement Type   | Standalone                                      |
| Contract Type    | Purchase Agreement (UM making purchase) / Goods |
| Contract Value   | 100,000.00                                      |

View email attachment to download file: Purchase of Goods Agreement.docx

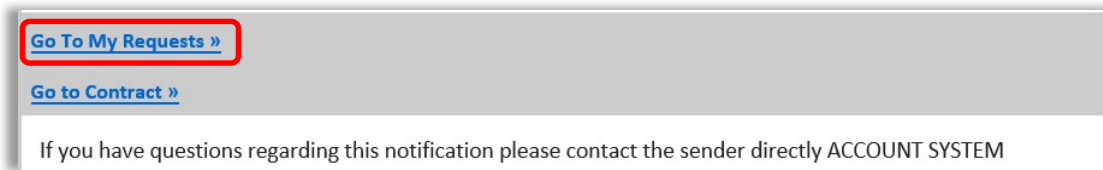
[Go To My Requests »](#)


[Go to Contract »](#)

If you have questions regarding this notification please contact the sender directly ACCOUNT SYSTEM

**TIP: Received means** that a Contract Owner in the CCU has received your request for review and evaluation, and that status of the Request is *Accepted*. **Received does not mean** that your contract is ready or signed.

- Click on the **Go To My Requests** button at the bottom of the email notification to log back into Conga.



- Click the **Go to Contract** icon (  ) on the relevant Request to go to the Contract Profile (i.e., contract record).

My Requests

New Request





Created within: 

Past 30 days


Request Status:


Request Type:

Search

| Request Type Name     | Request Status | Company Name          |   | Request Bundle Numb... | Request Number | Contract Number | Processed By         | Created On |
|-----------------------|----------------|-----------------------|---|------------------------|----------------|-----------------|----------------------|------------|
| Procurement (Acad...  | Accepted       | Test MRI Company      |  | TEST-00414             | TEST-00414-001 | TES-STA-0000292 | SYSTEM, ACCOUNT      | 05/15/2020 |
| Privacy Request Fo... | Accepted       | Test Counterparty LLC |  | TEST-00412             | TEST-00412-001 | TES-STA-0000287 | Zandbergs, Rita      | 05/13/2020 |
| General Counsel Re... | Accepted       | Williams, Andrew      |  | WILL-00402             | WILL-00402-001 | WIL-STA-0000286 | Zandbergs, Rita      | 05/12/2020 |
| Business Services ... | Accepted       | Test Counterparty LLC |  | TEST-00399             | TEST-00399-001 | TES-STA-0000284 | Owner (BS), Contract | 05/11/2020 |

- In the Contract Profile you can view the contract as it moves through all the **Stages** of the contract process.



Home

? 

### Contract Profile - Test MRI Company TES-STA-0000292


Additional Parties (0)

[Workflows](#)
[One Click Report](#)
[Print](#)
[Help](#)

**Contract Assignment**


Status updated to: Pending Assignment

Assign Contract Responsibility Contract Owner (200) Notice

|                   |   |                         |   |
|-------------------|---|-------------------------|---|
| Contract Group:   | MSOM/UHealth - Medical Oncology                 | Legal Entity:           | University of Miami   |
| Contract Purpose: | Purchase of MRI machines                        | Original Company:       | Test MRI Company  |
| Contract Number:  | TES-STA-0000292                                 | <b>Term and Renewal</b> |   |
| Currency:         | USD United States of America, Dollars           | Term Type:              | Fixed - Auto Inactivate   |
| Contract Value:   | 100,000.00                                      | Effective Date:         |   |
| Agreement Type:   | Standalone                                      | Original Exp Date:      |  |
| Contract Type:    | Purchase Agreement (UM making purchase) / Goods | Current Exp Date:       |   |

15. In the Term and Renewal section of the Contract Profile, you can view the **Status** of the contract.

Term and Renewal

Term Type: Fixed - Auto Inactivate

Effective Date: 08/18/2020

Original Exp Date: 08/17/2021

Current Exp Date: 08/17/2021

Renewal Interval (months):

Notice Period:

Notice Date:

Status: Active

16. Scroll down to the **Links** section of the profile to view additional information about the contract.
  - a. The name of the *Contract Owner*, once assigned, and other users associated with the contract, are listed under **People**.

Contract Profile - Test MRI Company TES-STA-0000292


Additional Parties (0)

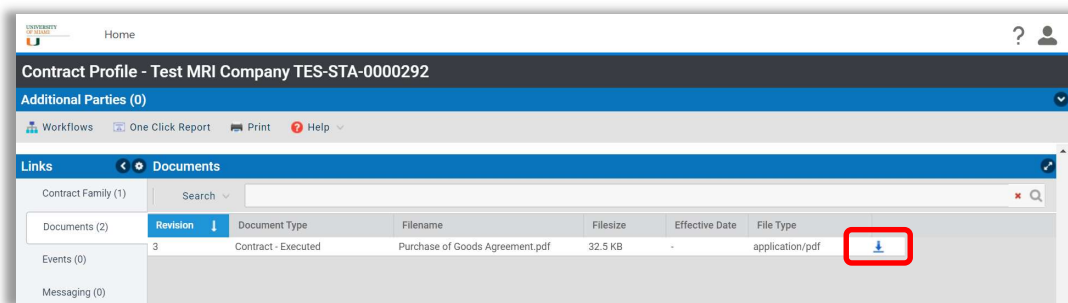
Workflows One Click Report Print Help

Links

People

| Contract Family (1) | Responsibility               | Name               | Email Address         | Work Phone | Mobile Phone | Home Phone | Fax Number |
|---------------------|------------------------------|--------------------|-----------------------|------------|--------------|------------|------------|
| Documents (2)       | Value Analysis Approver      | Zandbergs, Rita    | rita.zandbergs@con... | -          | -            | -          | -          |
|                     | Contract Owner (Procurement) | Zandbergs, Rita    | rita.zandbergs@con... | -          | -            | -          | -          |
|                     | PCI Compliance Approver      | Zandbergs, Rita    | rita.zandbergs@con... | -          | -            | -          | -          |
| Events (0)          | Requester                    | User, Request Only | rita.zandbergs@con... | -          | -            | -          | -          |
| Messaging (0)       |                              |                    |                       |            |              |            |            |

- b. When the contract process has been completed, you will receive an email notification from Conga informing you that the contract has been signed and is now active. The signed contract is stored in **Documents**. Click on the link in the email notification to log into Conga, go to Documents and use the Blue Arrow icon (  ) to download the document.

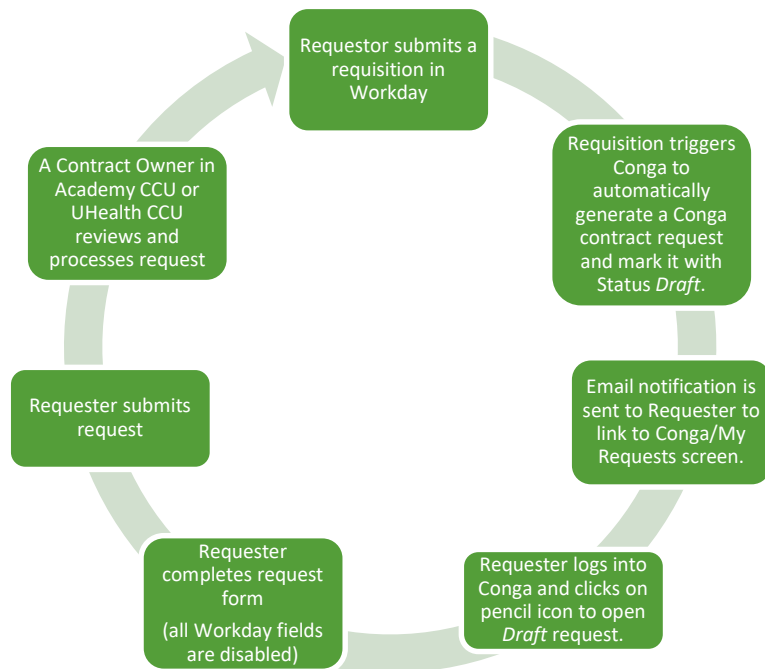


17. During the contracting process, you may receive email communications through the Messaging tool from the Contract Owner to provide additional information, review the contract and/or send it to the Counterparty. Additional information regarding how to respond to emails received from the Conga Messaging tool is found here: [Messaging](#).

## Submitting a Procurement Contract Request Requiring a Purchase Order

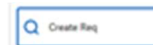
The Workday-Initiated Requested Form is to be used for those requests that have first been **initiated** in **Workday**. Requests in Workday that require a contract automatically trigger creation of a contract record in Conga. When the trigger occurs, you receive an email notification instructing you to log into Conga and continue completing the request form that has been automatically initiated and marked with a Status of *Draft*. Although this request form appears in the list of Request Types, it should never be selected in Conga directly from the menu.

## Workday-Conga Request Process Diagram



### Standard Request

1. Log into Workday at <https://workday.miami.edu>
2. In the search field type "Create Req" and click the magnifying glass.
3. Click **Create Requisition – Task** link.
4. Click **Request non-catalog items**.
5. Complete the **Non-Catalog Items** fields. Note this screen may not appear if there are items in the shopping cart from a previous requisition that was not submitted or saved for later.



## Example

A screenshot of a Conga form with the following fields and values:

- Company**: 200 Academy
- Requester**: Michelle Roy
- Currency**: USD
- Requisition Type**: Consulting Agreement
- Deliver-To**: Gables One Tower > Floor 04 > Room 400.34
- Ship-To**: 1320 S Dixie Hwy Gables One Tower 400.34 Coral Gables, FL 33146-2926 United States of America
- Program**: PG000999 Director University Purchasing

6. *Company* (e.g. 200 Academy)
7. *Requester* – (requisition creator’s name) If ordering on behalf of someone else, note their name in the *Internal Memo* field on the *Checkout* screen.
8. *Currency* – (All pricing must be in USD).
9. *Requisition Type* - (Select any option with exception to “Z-Do Not Use....”)
10. *Deliver-To* – (The building’s receiving area or your department’s office location.)
11. *Ship-To* – (Replace the information with the department’s office location.)
12. *Program/Grant/Gift/Project* – (driver worktag)
13. Click **OK**.
14. Complete the *Add Non-Catalog Item* fields. (example)


A screenshot of the 'Service Request Details' form with the following fields and values:

- Description**: Scope of Work: Develop software for Dr. Mendez to record... Payments: Initial payment of \$500 to bring project and \$50 each month for reporting, updates, and software maintenance.
- Spend Category**: 5008720 - Licenses
- Supplier**: ATLAS BIOLOGICALS
- Supplier Contract**
- Start Date**: 08 / 01 / 2020
- End Date**: 07 / 31 / 2021
- Extended Amount**: 1,100.00
- Memo**: PO needed by 7/31/2020. Research Software for Dr. Mendez Research Project #123456

Buttons at the bottom: Add to Cart, Continue Shopping, Cancel.

15. Select one of the following Non-Catalog Request Types.
  - **Request Services** – *Services or Goods with multiple invoices to be paid.*
  - **Request Goods** – *Goods with only one invoice to be paid*
16. **Description** (services) or **Item Description** (goods)
  - Include the scope of work. This is located in the contract or quote.
  - Specify the payment plan. For example, “A down payment of \$100 will be paid before the work begins. \$50 will be paid for each additional month of service, over the life span of two years.
17. **Supplier Item Identifier** (goods) – the item number, part number, manufacturer number
18. Enter **Spend Category** (e.g. Consulting Fees, Hotel Conferences and Seminars)

Examples:

- SC08105 Consulting Fees
  - SC08000 Hotel Conferences and Seminars
  - SC08624 Entertainment – Food, Beverage, Reception
  - SC08720 Licenses
  - SC08811 Other Outside Services
  - SC09426 Capital Software
19. **Supplier** – Find the corresponding supplier. Be aware, selecting the incorrect supplier will result in having to re-create the requisition and Conga record. To [Select the Correct Supplier](#), compare the supplier’s address on the contract/quote to the address(es) listed in UMarketplace
  20. **Supplier Contract** – (leave blank)
  21. **Start Date** – (services) The date the contract starts. This does not need to correlate to UM’s fiscal year.
  22. **End Date** – (services) The date the contract ends. This does not need to correlate to UM’s fiscal year.
  23. **Supplier Item Identifier** (goods) – The item number
  24. **Quantity** (Goods only) – The number being ordered (based on the *Unit of Measure* field, i.e. 1 box)
  25. **Unit Cost** (Goods only) – The cost of this single item
  26. **Unit of Measure** (Goods only) – i.e. each, lot, or box
  27. **Extended Amount** (Service only)
    - Single Year Contracts – Type the total dollar amount of the contract
    - Multi-Year Contracts – Type either the amount to be spent the first year or for all years, depending on how much should be encumbered at the time the requisition is submitted
  28. **Memo** – Provide additional details such as:
    - General description of the good or service
    - Research/Project number
  29. Click **Add to Cart**.
  30. Click the shopping cart icon, located in the upper right corner. 

31. Click **Checkout**.
32. Review the items in the cart and click **Checkout**.
33. Confirm the **Ship-To-Address** matches your campus address. Remove Accounts Payable.
34. **Request Date** – (today's date)
35. **Currency** – (always leave as US Dollars, *USD*.) All quotes should be in USD.
36. **High Priority** – (Be aware, checking this box, does not change the order in which it is received or processed.)
37. **Sourcing Buyer** – (leave blank)
38. **Memo to Suppliers** - Note many vendors will not receive this information. Contact them directly with any specific instructions.
39. **Internal Memo** – Additional notes:
  - Need by date (optional)
  - Date the check needs to be sent by (optional)
  - Additional internal notes (optional)
  - Previous PO number(s) (optional)
40. **Attachments** - Click **Select files** and attach:
  - Word Document: Contract or contract draft (supplier's contract, aka "3<sup>rd</sup> party paper")
  - Statement of Work, Contract, Price List and/or Statement of Work, Quote
  - Sole Source Justification (if needed)
41. Click **Submit**. The current approver's name will appear.
42. Click **Done**.
43. Submitting the Workday requisition triggers Conga to generate a Workday- Initiated Request Form, which can be accessed in your Conga My Requests dashboard.
44. Conga sends you an email notification. In the email notification, click on the link to log into Conga.

From: [no.reply@conga.com](mailto:no.reply@conga.com)  
 Date: Monday, June 1, 2020 at 3:29 PM  
 To: Drew White <[drew.white@conga.com](mailto:drew.white@conga.com)>  
 Subject: Conga Contracts - UM Workday Requisition

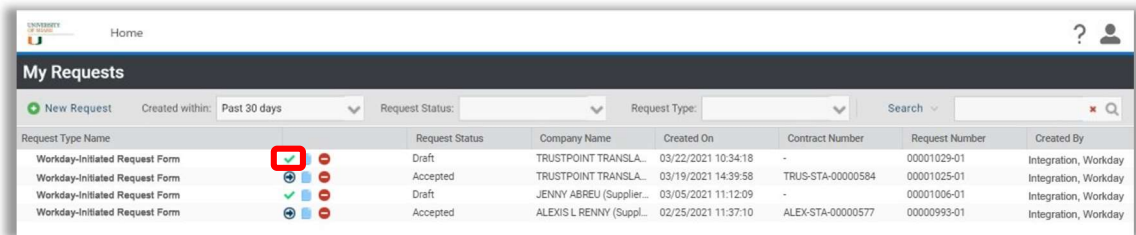
Hello Drew,

Your requisition request has been received by Conga Contracts. This request has not yet been submitted because additional information is required. Please continue to application to finish the requisition process. The following link will display a dashboard of your requests. Within an individual row on the dashboard, click on the green check mark to edit a request. Please provide values for all required fields and then click the 'Submit Request' button at the bottom of the form.

<https://sandbox.congacontracts.com/Contracts/#myrequests>



45. In your My Requests dashboard a Request has already been initiated using the Workday-Initiated Request Form and is in *Draft* Status.

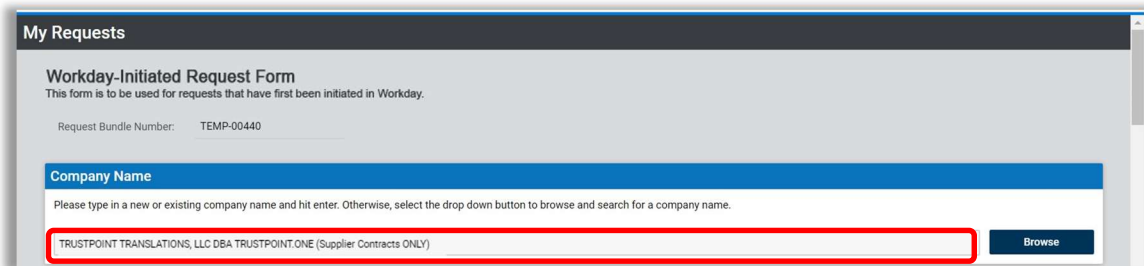


| Request Type Name              | Request Status | Company Name             | Created On          | Contract Number   | Request Number | Created By           |
|--------------------------------|----------------|--------------------------|---------------------|-------------------|----------------|----------------------|
| Workday-Initiated Request Form | Draft          | TRUSTPOINT TRANSLA...    | 03/22/2021 10:34:18 | -                 | 00001029-01    | Integration, Workday |
| Workday-Initiated Request Form | Accepted       | TRUSTPOINT TRANSLA...    | 03/19/2021 14:39:58 | TRUS-STA-00000584 | 00001025-01    | Integration, Workday |
| Workday-Initiated Request Form | Draft          | JENNY ABREU (Supplier... | 03/05/2021 11:12:09 | -                 | 00001006-01    | Integration, Workday |
| Workday-Initiated Request Form | Accepted       | ALEXIS L RENNY (Suppl... | 02/25/2021 11:37:10 | ALEX-STA-00000577 | 00000993-01    | Integration, Workday |

Click on the green check mark to open the request. Some of the data that you provided in Workday has been automatically populated in the Conga request form. These fields are disabled, because Workday is the source of truth for this information and users are not allowed to edit it.

46. **Company Name** is automatically populated for you with the name of the Supplier you selected in Workday. If the Supplier you selected in Workday has not yet been added to Conga (i.e., the Supplier information was not passed through the integration to Conga during the last **nightly** update), Company Name will automatically be populated with *TempVendor*.

**DO NOT EDIT COMPANY NAME FIELD.**



**My Requests**

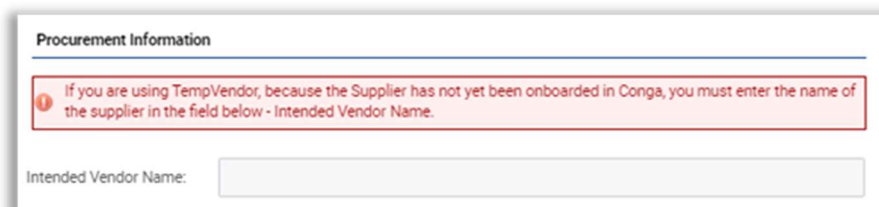
**Workday-Initiated Request Form**  
This form is to be used for requests that have first been initiated in Workday.

Request Bundle Number: TEMP-00440

**Company Name**  
Please type in a new or existing company name and hit enter. Otherwise, select the drop down button to browse and search for a company name.

TRUSTPOINT TRANSLATIONS, LLC DBA TRUSTPOINT.ONE (Supplier Contracts ONLY) Browse

- If **Company Name** is *TempVendor*, you can enter the name of the actual Supplier in the Intended Vendor Name field instead of the Company Name field. The Contract Owner will re-assign the contract to the actual Supplier once it has been added to Conga.



**Procurement Information**

! If you are using TempVendor, because the Supplier has not yet been onboarded in Conga, you must enter the name of the supplier in the field below - Intended Vendor Name.

Intended Vendor Name:

47. **Complete all fields in the request form.** The form is divided into sections. The main section contains common fields that are always visible and/or required.

**TIP:** All fields in request forms that are **required** are outlined in **red**.

**TIP:** If you tab from field to field in the request form, you will be taken first through all of Column 1 and then through Column 2.

**Agreement Type** defines if a contract is a Root/Parent (e.g., Master and Standalone) or Incorporated/Child (e.g., Amendment) agreement. Root agreement types are in bold in the drop-down list. Incorporated agreement types are not. When you select an Incorporated Agreement Type, a Related Agreement Information field opens.

**Contract Type** defines the type of contract (e.g., Services, Confidentiality). Some Contract Types have more than one level, e.g., Services Agreement (UM providing services). Ensure you select a sub-type to the lowest possible level, if required.

Enter the information below, upload any applicable documents, and click Submit

Request Number: 00001029-01

IN ORDER TO SUBMIT THIS FORM, YOU MUST FIRST HAVE SUBMITTED A WORKDAY REQUISITION. IF YOU HAVE NOT SUBMITTED A WORKDAY REQUISITION, PLEASE DO SO NOW.

Agreement Type: Standalone

Contract Type: 1. Purchase Agreement (UM making purchase) / Services

[?] Contract Value: 5,000.00

Contract Currency: USD United States of America, Dollars

[?] Proposed Expiration Date: 08/24/2022

What goods and/or services are being purchased?:

Mouse over [?] to reveal **Quick Tips** regarding the data field.

If you answer **Yes** to “Are you providing documentation provided by Counterparty?”, **ensure you upload the documentation to the Documents section at the bottom of the request form.**

**The system will not provide a pop-up alert if you forget an attachment.**

[?] Are you providing documentation provided by Counterparty? Yes

Counterparty is external company or individual with which you would like to do business with

Will any services be performed on university premises?: Yes

If you answer **Yes** to “Will any data pertaining to individuals be transferred to or processed in the European Union under the agreement; and, do the activities under the agreement involve any data pertaining to individuals located in the European Union?”, Conga will send you an email notification indicating you must use the Business Associate Agreement/Data Processing Addendum Request Form ([Submitting a Business Associate Agreement/Data Processing Addendum Request](#)) to request a **Data Processing Addendum**.

**International Information**

Will the vendor be providing any data or processing any data related to individuals located in the European Union?: No

Will any data pertaining to individuals be transferred to or processed in the European Union under the agreement; and, do the activities under the agreement involve any data pertaining to individuals located in the European Union?: No

Enter contact details for your main point of contact at the Counterparty in the **Counterparty Contact Information** data fields.

**Counterparty Contact Information**

Counterparty Contact Name:

Counterparty Contact Email:

Counterparty Contact Phone Number:

**Request Date** defaults to the date on which you initiate the request form.

Request Date: 06/01/2020

University Division: Facilities Operations and Planning

Department: Facilities and Operations

**Security and Privacy Information**

Will Counterparty have access or be exposed to protected health information or personally identifiable information?:

Select the **University Division** and **Department** for which the contract is being requested. University Division and Department fields are linked. The value you select in University Division drives the choices in Department.

### Security and Privacy

questions appear, when applicable.

If you answer **Yes** to “*Will Counterparty have access or be exposed to protected health information or personally identifiable information?*”, Conga will send you an email notification indicating you must use the Business Associate Agreement/Data Processing Addendum Request Form ([Submitting Business Associate Agreement/Data Processing Addendum Request](#)) to request a **Business Associate Agreement**.

Watch for this email notification!

**Security and Privacy Information**

Will Counterparty have access or be exposed to protected health information or personally identifiable information?: Yes

Counterparty's access or exposure to PHI/PII: Student information

Description: Expand

Will vendor be storing, processing, transmitting, credit card holder data, or be providing services that control or could impact the security of cardholder data?: -- No Value Selected --

❗ This field is required

If Company Name is TempVendor, because the Supplier is not yet in Conga, enter the name of the Supplier in the **Intended Vendor Name** field.

**Procurement Information**

❗ If you are using TempVendor, because the Supplier has not yet been onboarded in Conga, you must enter the name of the supplier in the field below - Intended Vendor Name.

Intended Vendor Name:

Will this contract involve the purchase of supplies, instrumentation, equipment and/or contracted services which are new technology for the Counterparty or have not been previously used at the University?: -- No Value Selected --

❗ This field is required

Use the **Additional Relevant Information** field to capture any additional information about the contract you are requesting that was not captured above.

**Additional Contract Information**

Additional Relevant Information:

Expand

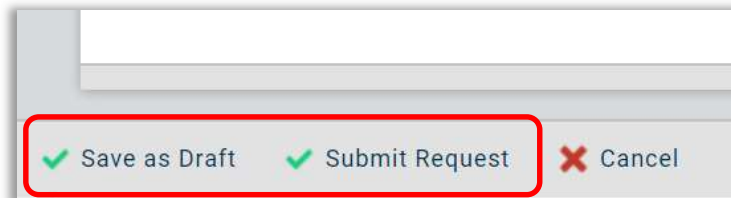
All data in the **Workday Information** section is disabled. Users are not allowed to edit this data.

Workday Company Code field determines the routing of the request – either to Purchasing (Academic and Research) or UHealth Supply Chain Services.

**Note:** Requests that originate with Workday Company 200 will route to Academy, whereas requests that originate with Workday Company in the 300s will route to UHealth Supply Chain Services.

48. If you uploaded a document to the requisition you submitted in Workday, it will be attached in the Documents section of the request form. If you need to upload any additional documents, use the Select File button to select and upload the document from your computer.

49. When you are ready to submit the request form, click **Submit Request** at the bottom of the screen. If you are not ready to submit the request form, click **Save as Draft**. The request form is saved to My Requests and you may re-open, edit and submit the request at a later time.




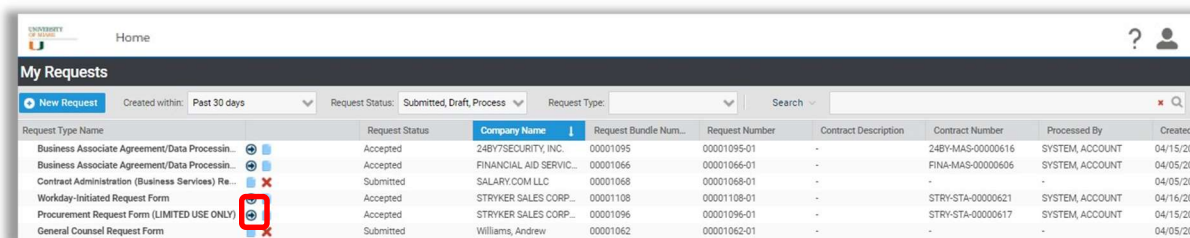
**TIP:** If you forget to add an attachment you can always upload it later as document under the Links > Documents Section.

50. Upon submitting your request, you are returned to the **My Requests** screen, where you can view the status of your request.

**CRITICAL TIP:** When you submit a Workday-Initiated Request Form, the initial **Status** is *Accepted*, because the system automatically processes it and routes it to the relevant group (Academy/200 or UHealth/300) for review. By way of comparison, when you submit Business Services and General Counsel Requests, the initial Status of the request is *Submitted*. A Request Approver in the CCU reviews and accepts (or declines) the request. Once the request is accepted, the Request Status updates to *Accepted*.

| Request Type Name                                 | Request Status | Company Name            | Request Bundle Num... | Request Number | Contract Description | Contract Number   | Processed By    | Created  |
|---|----------------|-------------------------|-----------------------|----------------|----------------------|-------------------|-----------------|----------|
| Business Associate Agreement/Data Processin...    | Accepted       | 24BY7SECURITY, INC.     | 00001095              | 00001095-01    | -                    | 24BY-MAS-00000616 | SYSTEM, ACCOUNT | 04/15/20 |
| Business Associate Agreement/Data Processin...    | Accepted       | FINANCIAL AID SERVIC... | 00001066              | 00001066-01    | -                    | FINA-MAS-00000606 | SYSTEM, ACCOUNT | 04/05/20 |
| Contract Administration (Business Services) Re... | Submitted      | SALARY.COM LLC          | 00001068              | 00001068-01    | -                    | -                 | -               | 04/05/20 |
| Workday-Initiated Request Form                    | Accepted       | STRYKER SALES CORP...   | 00001108              | 00001108-01    | -                    | STRY-STA-00000621 | SYSTEM, ACCOUNT | 04/16/20 |
| Procurement Request Form (LIMITED USE ONLY)       | Accepted       | STRYKER SALES CORP...   | 00001096              | 00001096-01    | -                    | STRY-STA-00000617 | SYSTEM, ACCOUNT | 04/15/20 |
| General Counsel Request Form                      | Submitted      | Williams, Andrew        | 00001062              | 00001062-01    | -                    | -                 | -               | 04/05/20 |

**TIP:** You may need to refresh the My Requests screen in order to refresh the Request Status of the Procurement Request from Submitted to Accepted. Click the **Go to Contract** icon (  ) on the relevant Request in your My Requests screen to go to the Contract Profile (i.e., contract record).



| Request Type Name                                 | Request Status | Company Name            | Request Bundle Num. | Request Number | Contract Description | Contract Number   | Processed By    | Created  |
|---|----------------|-------------------------|---------------------|----------------|----------------------|-------------------|-----------------|----------|
| Business Associate Agreement/Data Processin...    | Accepted       | 24BY7SECURITY, INC.     | 00001095            | 00001095-01    | -                    | 24BY-MAS-00000616 | SYSTEM, ACCOUNT | 04/15/20 |
| Business Associate Agreement/Data Processin...    | Accepted       | FINANCIAL AID SERVIC... | 00001066            | 00001066-01    | -                    | FINA-MAS-00000606 | SYSTEM, ACCOUNT | 04/05/20 |
| Contract Administration (Business Services) Re... | Submitted      | SALARY.COM LLC          | 00001068            | 00001068-01    | -                    | -                 | -               | 04/05/20 |
| Workday-Initiated Request Form                    | Accepted       | STRYKER SALES CORP...   | 00001108            | 00001108-01    | -                    | STRY-STA-00000621 | SYSTEM, ACCOUNT | 04/16/20 |
| Procurement Request Form (LIMITED USE ONLY)       | Accepted       | STRYKER SALES CORP...   | 00001096            | 00001096-01    | -                    | STRY-STA-00000617 | SYSTEM, ACCOUNT | 04/15/20 |
| General Counsel Request Form                      | Submitted      | Williams, Andrew        | 00001062            | 00001062-01    | -                    | -                 | -               | 04/05/20 |

51. Once your request is processed by the system, you also receive an **email notification** from Conga indicating that your request has been received by Account System.

**Conga Contracts Request**

## Request Received

**BAY PLUMBING CO (Supplier Contracts ONLY)**

Your request has been received by ACCOUNT SYSTEM (systemaccount@novatusinc.com). You can view the details by going to Requests under the Contract tab or by clicking the link below.

|                         |  |
|-------------------------|--|
| <b>Requested By</b>     | Workday Requester                                  |
| <b>Approved By</b>      | ACCOUNT SYSTEM                                     |
| <b>Company Name</b>     | BAY PLUMBING CO (Supplier Contracts ONLY)          |
| <b>Contract Purpose</b> | Purchase of services                               |
| <b>Agreement Type</b>   | Standalone   |
| <b>Contract Type</b>    | Purchase Agreement (UM making purchase) / Services |
| <b>Contract Value</b>   | 100.00   |

[Go To My Requests »](#)  
[Go to Contract »](#)

If you have questions regarding this notification please contact the sender directly ACCOUNT SYSTEM (systemaccount@novatusinc.com). For technical assistance with the request process, you can email support.

**TIP: Received means** that a Contract Owner in the CCU has received your request for review and evaluation, and that status of the Request is *Accepted*. **Received/Accepted does not mean** that your contract has been reviewed or is ready or signed.

52. In the Contract Profile you can view the contract as it moves through all the **Stages** of the contract process.

**Contract Profile - BAY PLUMBING CO (Supplier Contracts ONLY) BAY-STA-0000302**

Additional Parties (0)

Workflows One Click Report Print Help

**Contract Assignment**

Status updated to: Pending Assignment

Assign Contract Responsibility Contract Owner (200) **Notes**

|                   |  |                   |   |
|-------------------|--|-------------------|---|
| Contract Group:   | B & F - Facilities Operations and Planning - Facilities and Operations | Legal Entity:     | University of Miami                       |
| Contract Purpose: | Purchase of services   | Original Company: | BAY PLUMBING CO (Supplier Contracts ONLY) |
| Contract Number:  | BAY-STA-0000302  |                   |   |
| Currency:         | USD United States of America, Dollars                                  |                   |   |
| Contract Value:   | 100.00   |                   |   |
| Agreement Type:   | Standalone   |                   |   |
| Contract Type:    | Purchase Agreement (UM making purchase) / Services                     |                   |   |

**Term and Renewal**

Term Type: Fixed - Auto Inactivate

Effective Date:

Original Exp Date:

Current Exp Date:

53. In the Term and Renewal section of the Contract Profile, you can view the **Status** of the contract.

**Term and Renewal**

Term Type: Fixed - Auto Inactivate

Effective Date: 08/18/2020

Original Exp Date: 08/17/2021 ⓘ

Current Exp Date: 08/17/2021

Renewal Interval (months):

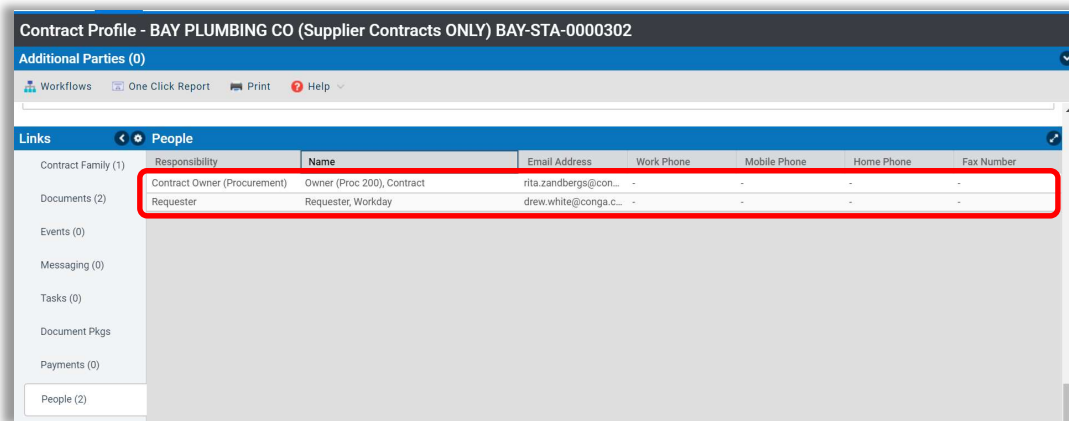
Notice Period:


Notice Date:

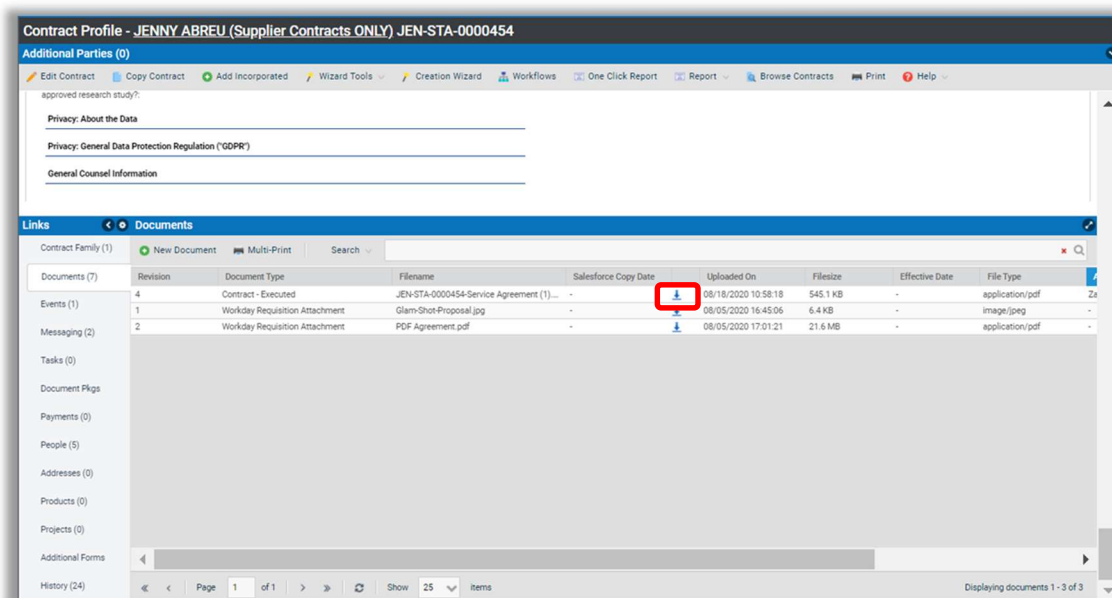
**Status: Active**



54. Scroll down to the **Links** section of the profile to view additional information about the contract.
  - a. The name of the *Contract Owner*, once assigned, and other users associated with the contract are listed under **People**.



- b. When the contract process has been completed, you will receive an email notification from Conga informing you that the contract has been signed and is now active. The signed contract is stored in **Documents**. Click on the link in the email notification to log into Conga, go to Documents and use the Blue Arrow icon (  ) to download the document.



55. During the contracting process, you may receive and send email communications through the Messaging tool from the Contract Owner to provide additional information, review the contract and/or send it to the Counterparty. Additional information regarding the Messaging tool is found here: [Messaging](#).

**TIP:** When responding to an email communication received from Conga’s Messaging tool, please reply all to make sure the communication is stored with the contract record.

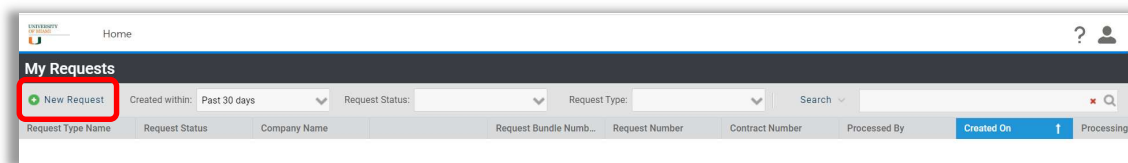
### Additional Key Information

1. **Requisition in Workday did not trigger a Conga Contract Request – and it should have.**
  - a. If you submit a requisition in Workday and do not receive an email notification from Conga to link to the Conga Contract Request, but expected to, it is likely that your requisition has an error (e.g., an incorrect Spend Category, technical issue). When this occurs, contact your Procurement Department for assistance.
2. **Change Orders**
  - a. The end user must first submit a change order in Workday.
  - b. After routing to the corresponding Procurement Department for approval, the Change Order information will be updated manually in Conga by the Contract Owner.
3. **Emergency PO**
  - a. In the event of an emergency PO is needed, a Contract Owner in the relevant Central Contracting Unit will manually create a purchase order in Workday and process the contract in Conga, and therefore no Conga Contract Request is required to be submitted.

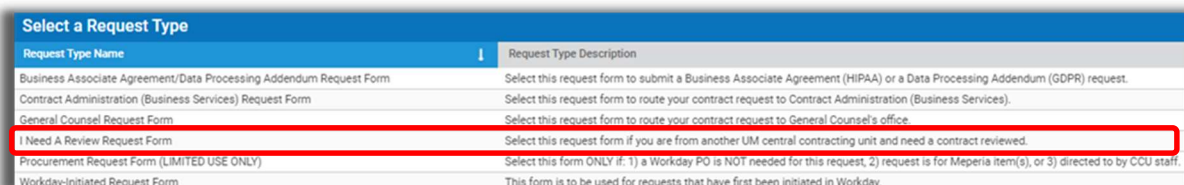
## Submitting an I need a Review Request

This request form is used if you are requesting a review on behalf of another Central Contracting Unit at the university (e.g., ORA, OTT).

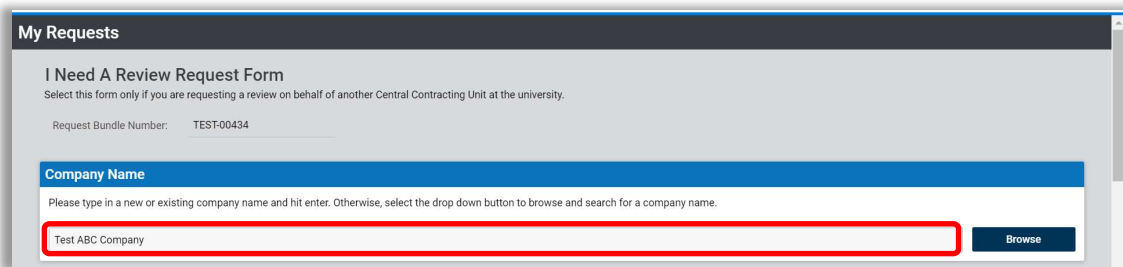
1. Log into Conga Contracts.
2. On your My Requests dashboard, click **New Request** to open the list of Request Types.



3. Select **I need a Review Request Form**.



4. Enter the Counterparty's name in the **Company Name** field. As you begin typing the name, the system filters the full company listing and finds names that match your criteria.
  - a. If the Counterparty already exists, select it.
  - b. If you see the same name twice, select the value that *does not include* the extension "(Supplier Contracts ONLY)". Company Names with this extension are to be used for contracts that are processed using either of the two Procurement request forms only.
  - c. If it does not exist and you are creating a new company, ensure that the name you enter in this field is the full legal name of the company, as it should appear in a contract and *click Add New Company*. Later in the request form, you will be required to provide additional data for the creation of a new company.



**My Requests**

**I Need A Review Request Form**  
Select this form only if you are requesting a review on behalf of another Central Contracting Unit at the university.

Request Bundle Number: TEST-00434

**Company Name**  
Please type in a new or existing company name and hit enter. Otherwise, select the drop down button to browse and search for a company name.

Test ABC Company Browse

**TIP:** You may also use the Browse button to open the full Company listing and search for the Counterparty.

5. **Complete all required fields in the request form.** The form is divided into sections. The main section contains common fields that are always visible and/or required. Data fields in sections that contain a "header" (e.g., Revenue Payment Information) only appear when the fields are relevant to the request.

**TIP:** All fields in request forms that are **required** are outlined in **red**.

**TIP:** If you tab from field to field in the request form, you will be taken first through all of Column 1 and then through Column 2.

**Enter the information below, upload your contract and any support documents, and**

Request Number: TEST-00434-001

Contract Purpose: Licensing Agreement regarding IP

Contract Type: Licensing Agreement / IP

[?] Counterparty Contact Name: James Walker

Counterparty Contact Email: jwalker@tabc.com

Counterparty Contact Phone Number: 508-555-1111

**Upload document(s) below (e.g., contract to be reviewed, supplemental)**

Mouse over [?] to reveal Quick Tips regarding the data field.

**Click Submit Request at the bottom of this form.**

[?] Request Date: 05/29/2020

University Division: Hemispheric and Global Affairs

Department: Office of Hemispheric and Global Affairs

[?] Central Contracting Unit: Business Services

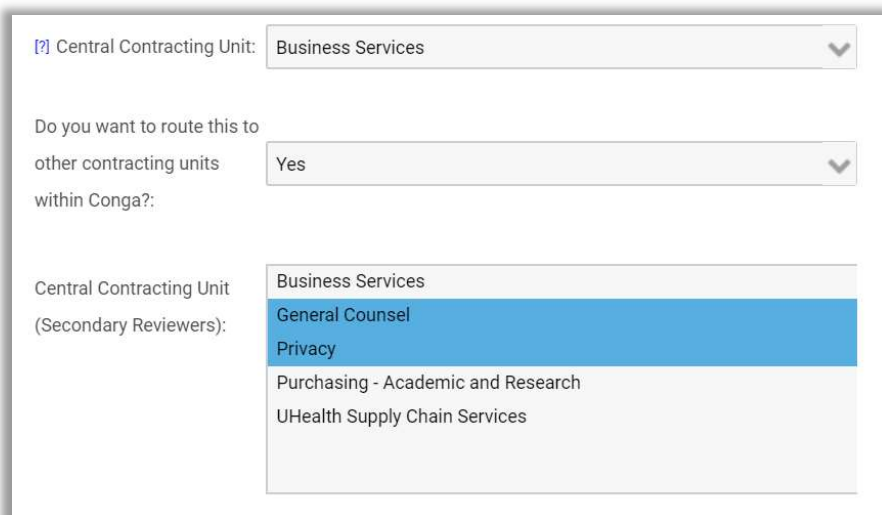
**Central Contracting Unit**

Select one (i.e., the primary) Central Contracting Unit to route this to for review within Conga

**This field is required**

Additional Relevant Information:

If you want to route your request for review to additional CCUs, answer **Yes** and select from the **Secondary** list.



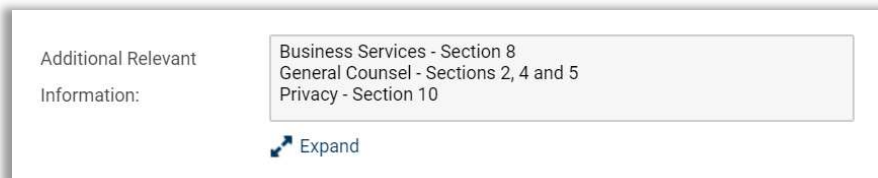
[?] Central Contracting Unit: Business Services

Do you want to route this to other contracting units within Conga?: Yes

Central Contracting Unit (Secondary Reviewers):


- Business Services
- General Counsel
- Privacy
- Purchasing - Academic and Research
- UHealth Supply Chain Services

Use the Additional Relevant Information field to describe/explain the contract/deal and/or what specifically needs to be reviewed.



Additional Relevant Information:


Business Services - Section 8  
General Counsel - Sections 2, 4 and 5  
Privacy - Section 10


 Expand

- In the **Documents** section, upload the contract that you need review, as well as any other supplemental documentation. Click **Select File** to find and select the document on your computer and attach it to the request. Repeat, as needed.



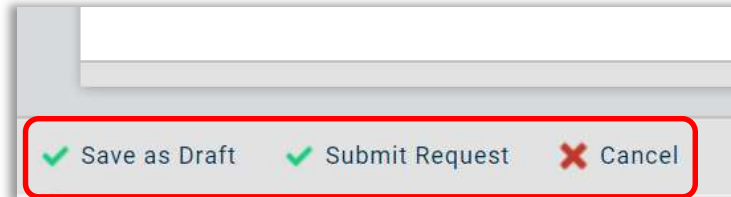
Documents

 Remove All

  Licensing Agreement.docx

Choose file to upload: 

- When you are ready to submit the request form, click **Submit Request** at the bottom of the screen. If you are not ready to submit the request form, click **Save as Draft**. The request form is saved to My Requests and you may re-open, edit and submit the request at a later time. If you want to cancel the request, click **Cancel**.



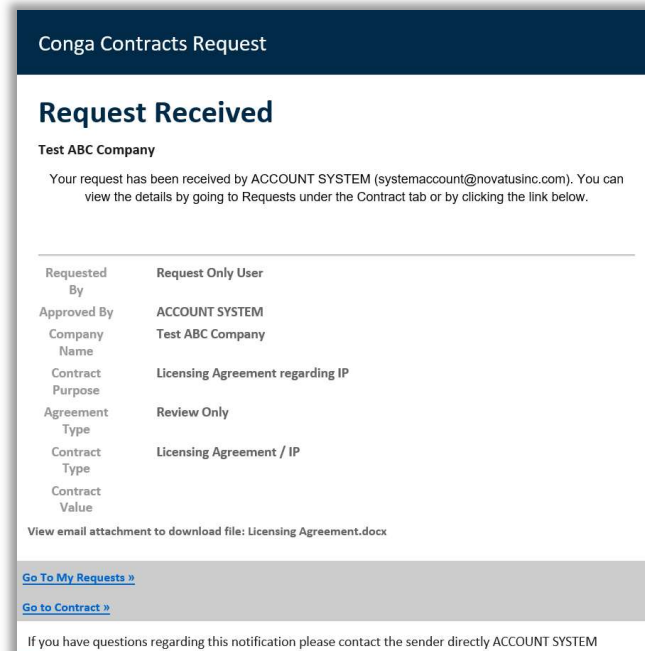
- Upon submitting your request, you are returned to the **My Requests** screen, where you can view the status of your request.

**CRITICAL TIP:** When you submit an I need a Review request, the **Status** is *Accepted*, because the system automatically processes it and routes it to the relevant CCU(s).

| Request Type Name     | Request Status | Company Name          | Request Bundle Numb. | Request Number | Contract Number | Processed By         | Created On |
|-----------------------|----------------|-----------------------|----------------------|----------------|-----------------|----------------------|------------|
| I Need A Review Re... | Accepted       | Williams, Andrew      | WILL-00402           | WILL-00402-001 | WIL-STA-0000286 | Zandbergs, Rita      | 05/12/2020 |
| Contract Adminstr...  | Accepted       | Test Counterparty LLC | TEST00399            | TEST00399-001  | TES-SIA-0000284 | Owner (BS), Contract | 05/11/2020 |

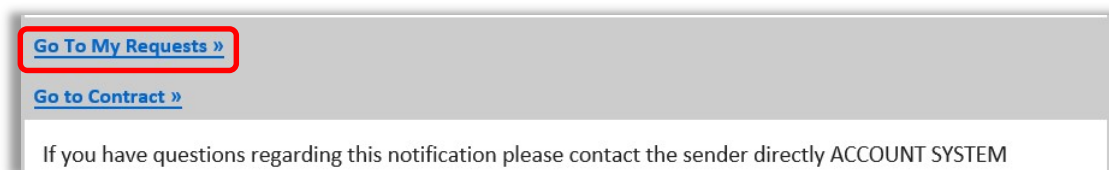
**TIP:** You may need to refresh the My Requests screen in order to refresh the Request Status of the Procurement Request from Submitted to Accepted.


9. Once your request has been processed by the system, you will receive an **email notification** from Conga indicating that your request has been received by Account System.

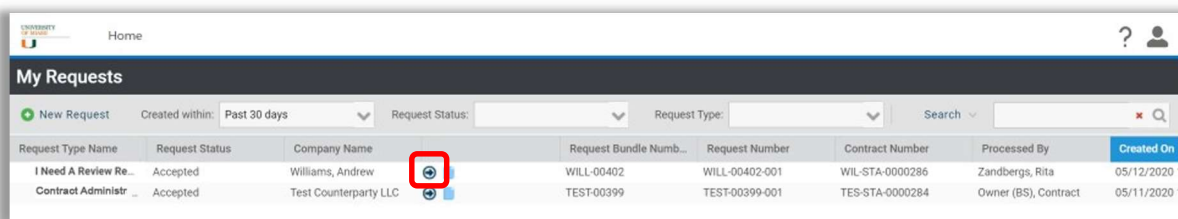


**TIP: Received means** that a Review Owner in the CCU has received your request for review, and that status of the Request is *Accepted*. **Received does not mean** that the review has been completed.

10. Click on the **Go To My Requests** button at the bottom of the email notification to log back into Conga.

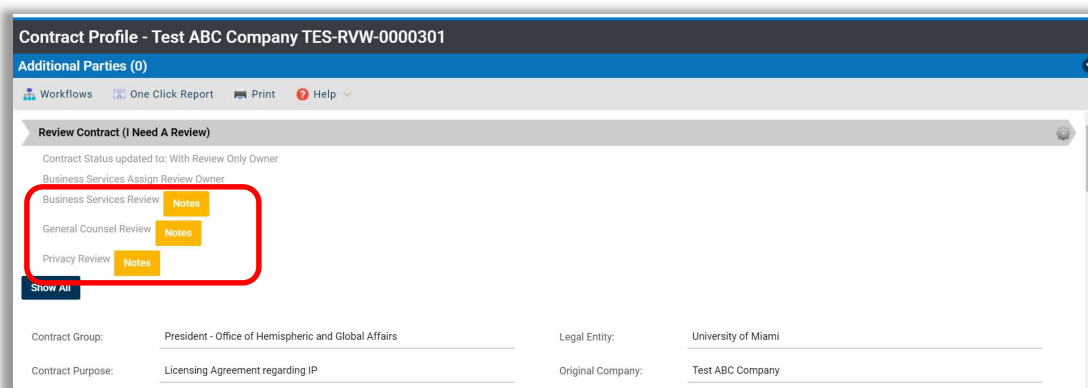


- Click the **Go to Contract** icon (  ) on the relevant Request to go to the Contract Profile (i.e., contract record).



| Request Type Name     | Request Status | Company Name          | Request Bundle Num... | Request Number | Contract Number | Processed By         | Created On   |
|-----------------------|----------------|-----------------------|-----------------------|----------------|-----------------|----------------------|--------------|
| I Need A Review Re... | Accepted       | Williams, Andrew      | WILL-00402            | WILL-00402-001 | WIL-STA-0000286 | Zandbergs, Rita      | 05/12/2020 1 |
| Contract Administr... | Accepted       | Test Counterparty LLC | TEST-00399            | TEST-00399-001 | TES-STA-0000284 | Owner (BS), Contract | 05/11/2020 1 |

- In the Contract Profile you can view the contract as it moves through all the **Stages** of the review process.



**Contract Profile - Test ABC Company TES-RVW-0000301**

Additional Parties (0)

Workflows One Click Report Print Help

**Review Contract (I Need A Review)**

Contract Status updated to: With Review Only Owner

Business Services Assion Review Owner

Business Services Review **Notes**

General Counsel Review **Notes**

Privacy Review **Notes**

**Show All**

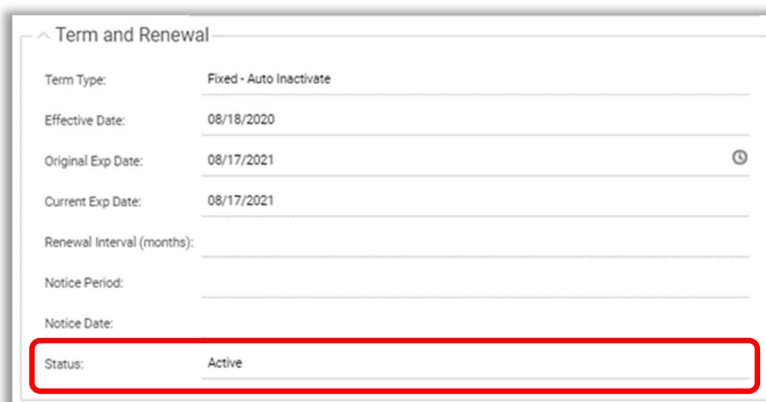
Contract Group: President - Office of Hemispheric and Global Affairs

Contract Purpose: Licensing Agreement regarding IP

Legal Entity: University of Miami

Original Company: Test ABC Company

- In the Term and Renewal section of the Contract Profile, you can view the **Status** of the review.



**Term and Renewal**

Term Type: Fixed - Auto Inactivate

Effective Date: 08/18/2020

Original Exp Date: 08/17/2021

Current Exp Date: 08/17/2021

Renewal Interval (months):

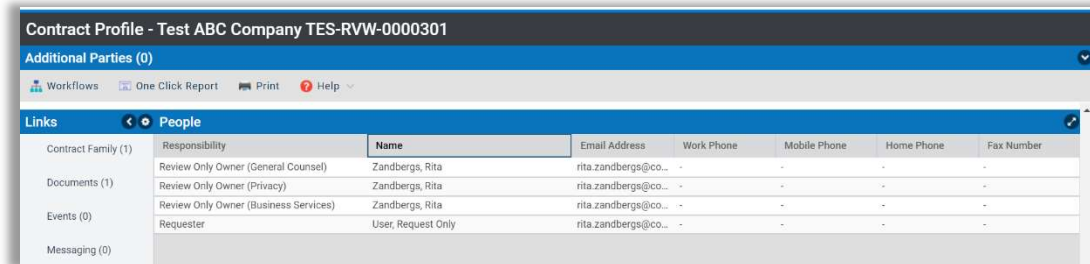
Notice Period:

Notice Date:

Status: Active



14. Scroll down to the **People Link** to view the name(s) of the *Review Only Owner(s)* who have been assigned to conduct the review.



**Contract Profile - Test ABC Company TES-RVW-0000301**

**Additional Parties (0)**

Workflows One Click Report Print Help

**Links** < **People**

| Responsibility                        | Name               | Email Address        | Work Phone | Mobile Phone | Home Phone | Fax Number |
|---------------------------------------|--------------------|----------------------|------------|--------------|------------|------------|
| Contract Family (1)                   |                    |                      |            |              |            |            |
| Review Only Owner (General Counsel)   | Zandbergs, Rita    | rita.zandbergs@co... | -          | -            | -          | -          |
| Documents (1)                         |                    |                      |            |              |            |            |
| Review Only Owner (Privacy)           | Zandbergs, Rita    | rita.zandbergs@co... | -          | -            | -          | -          |
| Review Only Owner (Business Services) | Zandbergs, Rita    | rita.zandbergs@co... | -          | -            | -          | -          |
| Events (0)                            |                    |                      |            |              |            |            |
| Requester                             | User, Request Only | rita.zandbergs@co... | -          | -            | -          | -          |
| Messaging (0)                         |                    |                      |            |              |            |            |

15. During the contracting process, Review Only Owner(s) will use the Conga Messaging tool to communicate with you about the contract you submitted for review. Additional information regarding how to use the Messaging tool is found here: [Messaging](#).

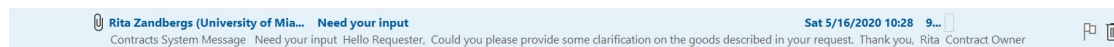
## Messaging

**Messaging** is a communication tool that allows a User to send an email notification from Conga Contracts to another User, an employee at UM who is not a user, or the Counterparty's contact. Documents can be attached to Messaging threads, if desired. And, if the Recipient replies to the Messaging thread, the reply is captured back in Conga Contracts, as well as in the Sender's email Inbox. Two people can have a conversation through email that is all captured in Conga, provided that the first email message originates in Conga and that both participants keep replying to the same messaging thread.

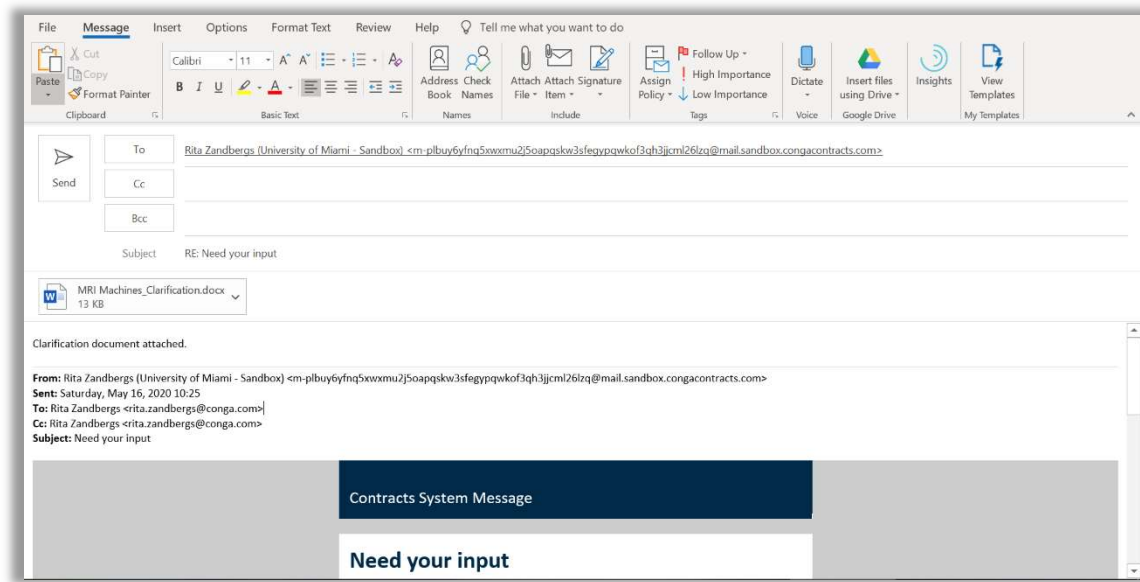
During the contracting process, you may receive a Messaging message from a Conga Contract Owner. Messaging messages, although sent through Conga, come from the User who sends it. If you receive a Messaging message, reply to it to ensure that your reply is captured back in Conga. If you attach documents to the reply, they will automatically be dropped into the Documents Link in Conga, thereby making it easier for the Contract Owner to manage the process.

## Replying to a Message

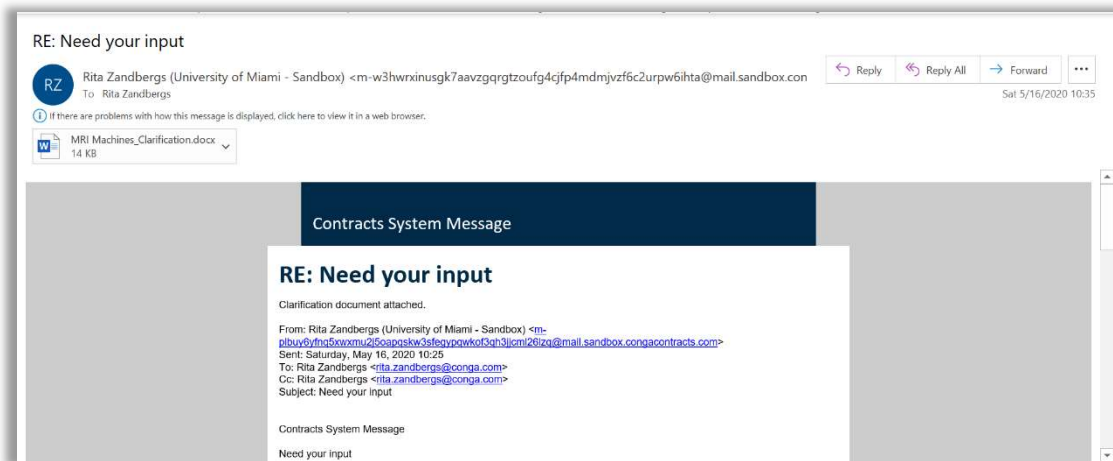
1. You will recognize a Messaging message from Conga based on the Sender. The Sender is the user; the user's name is followed by "(University of Miami)".



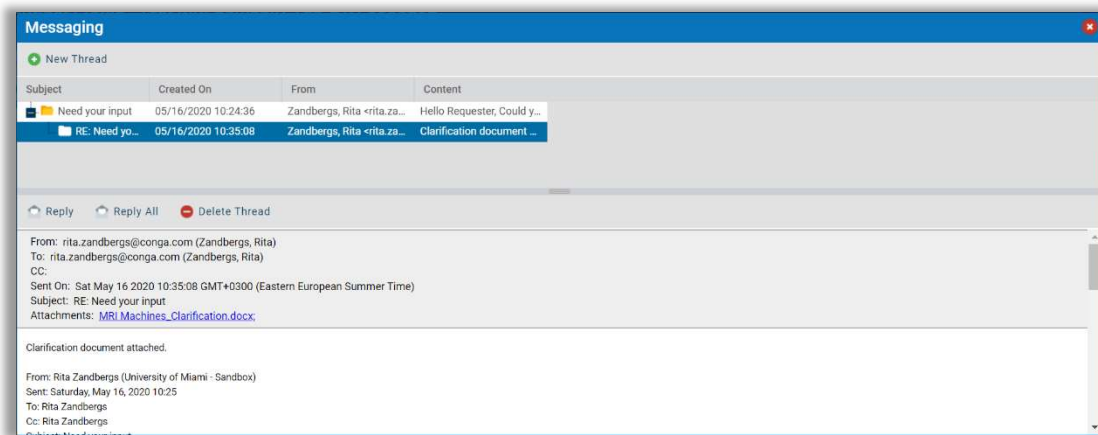
2. Open the email and hit **Reply All**.
3. Write your reply, attach a document (optional), and click **Send**.



4. When you reply to a Messaging message:
  - a. It is sent to the Recipient's email.



- b. It is **captured back in Conga** in Messaging.



- c. If the reply includes a Document, it is captured in Conga in the **Documents Link** for the Contract Owner to review.

## Help

Please contact your System Administrator or refer to the Conga Contracts Help section for more comprehensive and detailed instructions on all Conga Contracts features and functionality. Click on the Question Mark (?) in the top right corner of the Conga Dashboard to access Help and navigate to Conga Support.

