HoundMart: Contract Module Instructional Guide

Overview of HoundMart Contract Module and Benefits

The HoundMart Contract module allows designated Loyola employees to create and manage all of its contracts in one place. (SciQuest is Loyola’s eCommerce vendor.) Using this application will help Loyola:

- Streamline contract management through better collaboration from authoring to approval, and improve compliance by storing all contracts in a single central repository.
- Minimize authoring times with dynamic contract generation and the availability of a library of standard templates for full contracts, clauses and individual obligations.
- Eliminate risk of errors and missed obligations with a single point of information about all contract terms and conditions.
- Get real-time updates through Contract Performance, Compliance and Expiration dashboards.

Learn more on this short video of SciQuest Contract Management software benefits (1 minute 45 seconds).

Purpose of this Guide

This training guide will show you how to:

- Access the HoundMart application
- Identify menu items on the HoundMart Home Page
- Create a contract either by uploading a contract document or using a contract template
- Check on the status of your contract and understand the workflows that are triggered when a new contract is created
- Search for contract information

At the end of this guide, there is a dictionary of terms, as well as examples of email notifications.

Access HoundMart Application

1. Go to the Inside Loyola portal: https://inside.loyola.edu and log in using your AD username and password.
2. Click on the Applications tab.
3. Click on HoundMart.
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4. Enter your Loyola username and password, then click **Login**.

**HoundMart Home Page Overview**

Once logged in, you will see a screen similar to the one below.

*Depending on what roles and permissions are assigned to you, the menu items displayed may be different.*

The diagram below provides a short description of the top and left menu items.

This guide will focus on the **Contracts** module.
There are 2 ways to create a contract: (1) Upload a Contract or (2) Use a Template

The steps for each method are the same, except that if you select to **Upload a Contract**, there is an extra step required to attach the contract in the Attachments section.

Create a contract (by uploading a contract)

1. From the left hand menu, select **Contracts**.
2. Select **Create New Contract**.

   ![Create New Contract](image)

3. **Contract Name**: Enter a descriptive contract name.

   - Contract Name can be up to 100 characters
   - Examples: *Classic Catering Graduation Spring 2017* or *Loane Bros Convocation Fall 2016*
   - SciQuest will also assign a system generated name to the contract

4. **Contract Type**: To enter a contract type, you may begin typing one and results, if found, will display. Alternately, you may press the down arrow key or the magnifying glass to view all of the contract types.

   ![Create Contract](image)

Enter information in all required fields as indicated with an asterisk *
Contract Types

Click on **Loyola University Maryland** (or the radio button next to it) to see **Contract Type** options.

Most contracts will be **Monetary Based** although some, like internships, will be **Non-Monetary Agreements**.

Click on **Monetary Based** or **Non-Monetary Based** (or the adjacent radio button) to view more contract type options (most will be Expense Based).

Continue to open the categories this way until you find the correct one. Select the contract type by clicking on it, then **Save Changes** when done.
5. **Project**: Think of “Project” as the Loyola Department which will be administering, overseeing and paying for the work being performed under the contract. To select a department, you may: (1) begin typing the department name, (2) click the down arrow or (3) click the magnifying glass to view the department list.

6. **For Access and Visibility**, select **Confidential** if you want to limit access to this contract, otherwise leave access as **Normal**.

7. Click **Next**.

8. **Template**: Select **Upload My Own Contract** (or a **Contract Template**), then **Next**.

Examples of templates: Service Agreements are often used by Facilities; Facility Rental Agreements are often used by the Fitness and Aquatic Center and Events Services (for camps and rentals).
9. **Dates**: Enter the start date for the contract by entering it manually or selecting the calendar icon.

- Contract start and end dates can be blank when you create a contract and entered later, but once values are entered the dates cannot be set to blank again.
- If you check the option for 'Update Start Date Upon Execution,' the contract start date will be updated to the date the Electronic Signature is returned. If your contract requires a manual upload you will have the ability to update the start and end date at that time.
- If the term of the contract is >3 years and it is a monetary contract, it must be signed by Randy Gentzler.
- All contracts are reviewed by Jen Wood and forwarded to the vendor.

10. Click **Create Contract**.

    ![Create Contract](image)

    ➤ Your contract is now created, named and ready for input of details.
    ➤ Now it’s ready to add some basic information in the Contract Header and add the Contract Document.
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Create the Contract Header

Enter information in all the required fields marked with an *

Note that Expense-based contracts will contain a Financial Details section (that does not appear below.)

1. (Optional) **Parent Contract**: If there is a Master Service Agreement, enter the Parent contract name or click on the magnifying glass to view a list of master service agreements and to select one.

   For example, Loyola has a Master Service Agreement with Ellucian. But we could also have contracts under that for applications that Ellucian provides, such as Colleague and WebAdvisor.
2. **Use eSignature for this contract?** Select Yes.

This means that the contract will be approved using electronic signature. An eSignature option will appear in the left menu and individuals who will sign the contract using eSignature settings are selected here.

3. **(Optional) Summary:** Enter a summary of the contract, if desired, by clicking **Edit Summary**.

4. **Add the Contract Parties:**
   
   **Note:** Loyola University Maryland will auto-populate as the First Party (Primary).
   
   a. Click the **Add Party** drop-down menu and select **Second Party** to search for and select vendor.
   
   If the vendor you are searching for is not listed, you will need to add a new vendor using the **New Vendor Request** form on the HoundMart Home page. Refer to Appendix A.

   b. Enter a vendor name or click on the magnifying glass to list the vendors.

   c. Select the vendor, then click **Select Contract Party**.
d. **Contract Party Name**: Select a contact, then click **Next**.

![Select Primary Second Party](image)

![Select Primary Second Party](image)

- **d**. **Contract Party Name**
- **e**. **Optional** Choose an address, then click **Done**.

5. Add the **Dates and Renewal** terms:
   a. Enter (or edit) the **Start and End Dates** for the contract by entering them manually or selecting the calendar icon.
   b. **Optional** **Review Settings**:

   ![Review Settings](image)

   **Note**: These Review fields are used to schedule review notifications for approved contracts. They are used as reminders for long-term contracts or contracts with no expiration date. Review notifications settings are configured in the Notifications area.

   1) **Review Date**: Enter date of the first review that occurs after the contract is approved. When the review date is reached, the field value resets to the next scheduled review date, as defined by the review term and the number of reviews remaining.
   2) **Review Term**: Enter a review term. This is the interval between review dates, for example 1 day or 1 year.
   3) **Reviews Remaining**: Enter the maximum number of times that contract should be reviewed once it is approved. This value decrements each time a review notification is sent. Once it becomes 0, you will no longer receive contract review notifications. If the field is left blank, review notifications get sent as scheduled by the review term and review date until the contract ends.
c. (Optional) Renewals Remaining: If applicable, enter the number of times the contract can be renewed. This value decrements each time the contract is renewed. Once it becomes 0, the contract can no longer be renewed. If a number is entered in this field, you will also need to select Yes or No in the Auto-Renew field to indicate whether renewal contracts will be created manually by a contract manager (via the Contract Actions menu), or automatically by the system.

d. Automatically Apply Price File with Renewal: Select Yes if there is a price file associated with the contract and you would like to apply it automatically when the contract is renewed, otherwise select No.

e. Renewal Term: If a number is entered in the Renewals Remaining field, select a number and time period that reflects the length of time that renewal contracts will be in effect. The term you enter allows the system to calculate the end date for renewal contracts. For example, if you choose to set a renewal term of one year, the contract end date of next renewal will be set to a year from its start date.

f. Auto-Renew: If a number is entered in the Renewals Remaining field, select Yes if you want the system to automatically create a renewal contract when the preceding contract reaches its end date and there are renewals remaining. If Yes is selected, you can enter a date in the Auto-Renew Creation field to define when renewal contracts will be created. If no number is entered in the Auto-Renew Creation field, renewal contracts become effective as soon as the end date of the previous contract is reached. Note: A contract flagged for auto-renewal will generate a Renewal Pending notification.

g. Auto-Renew Creation: This field is displayed if the Auto-Renew field is set to Yes. Enter a number and time period that reflects the number of days prior to a contract's end date that the next renewal is to be created. For example, if the original contract's end date is set to January 31st, and you enter 10 days in this field, the first renewal contract will be created on January 21st. This will ensure a renewal contract is created and can be approved before the original contract expires. If this field is left blank, renewal contracts become effective as soon as the end date of the previous contract is reached.

6. (Optional) Additional Details section: This section includes key search words and hard copy location. It also includes campus impacted and identification of risk elements (next screen). Enter any key words that will be helpful in future contract searches and the physical location of the contract.

7. Click on Save Progress (so you don't lose anything), then click Next.
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8. **Additional Contract Details:**
   a. (Optional) Select **Campus** impacted from the drop-down menu.
   b. **Risk Elements:** Choose **Yes** or **No** for each of the risk element questions. Note: If you select **Yes** for any of these questions, you will need to answer additional questions about exhibits to include.
   c. Click **Save Progress**, then **Next**.

![Additional Contract Details](image)

9. **Exhibits:** Select applicable exhibits, then **Save Progress**, then **Next**.

![Exhibits](image)

10. **Alternative Language:** The Alternative Language page is only displayed if your organization is using alternative language clauses in the contract document. Alternative language, if necessary, would be added by the Approver, Jen Wood. (This is used when a clause in the contract changes depending on whether a certain condition exists, ex. Risk Level = High, then insert clause ‘X’). Click **Save Progress**, then **Next**.

![Alternative Language](image)
11. **Upload contract**: Select **Upload Main Document** from the left menu or the **Attachments** section of the contract. If you selected to use a template, then this step is automatically completed. If you don’t have any additional attachments, then skip to step 16.

12. Select **Upload Main Document** again.
13. Upload a document either by browsing for it or dragging and dropping it.
   a. Click on Select File to browse for your document and upload it OR
   b. To drag and drop: Open Windows explorer, search for the file, click and hold file and drag it to gray area.

14. Click Save Changes.

The contract is then saved in HoundMart.

15. Click Next.
16. (Optional) **Obligations:**
   a. Add Obligations, if applicable (for example: Certificate of Insurance)

17. **Review Rounds:**
   a. If this contract requires a review, then click on **Start Drafting Next Round.**

   b. Select **Internal Review Round** or **External Review Round,** then **Next.**
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c. Click on Add Reviewer.

d. Enter a name and click the magnifying glass to search for the name.

e. Click the Select button next to the reviewer’s name and Save Changes.

f. To add another Review Round, repeat the steps above.

g. To begin the review, click on Begin Round. Click
h. Click **Begin Internal Review** (or **External Review**).

![](Begin_Internal_Review.png)

i. Click **Next**.

![](Current_Round_Internal.png)

18. **eSignature**:

E-Signature requires you to enter a Signer for the contract. You may add a signer for **both the Primary and Secondary parties**.

a. Click on **Add Signer**

![](eSignature.png)
b. From the Contract Party drop-down menu, select the Primary or Secondary Party.

c. From the Choose a Contract drop-down menu, select **Manually Enter Signer**

d. Enter name and email of signer, then click **Save Changes**.

e. Repeat these steps for the Secondary Contract Party if desired.

f. Click **Next**.
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When all sections are complete, you will receive a notification that you can submit the contract for approval.

19. **Submit for Approval**: Click on **Submit for Approval** to begin the workflow.

You should receive the following confirmation that the contract has been submitted. You may view the Approval Steps and progress by clicking on the **View Approval Steps** section.
20. **Launch eSignature:**
   Once the contract has been approved, you may launch the eSignature process.
   
   a. Click on **eSignature** from the left menu.

   ![eSignature menu](image1)

   b. Select **Launch eSignature** from the Contract Actions drop-down menu on the upper right.

   ![Contract Actions menu](image2)

   c. This will activate the DocuSign application.
21. **DocuSign**: Use DocuSign application to tell the eSigner(s) what information is needed and where to sign.
   
   a. Click and drag the items you want the eSigner to fill in, like **Signature** or **Date Signed**, to the appropriate place in the contract.
   
   b. To change the signer, click on the drop-down menu where the eSigner names are listed in the upper left.
   
   c. Click **Send** in the upper right to send the contract to the eSigners.

![](image1.png)

22. **For the eSigner(s)**: You will receive an email that looks like the one below.
   
   a. Click on **Review Document**.

![](image2.png)
b. Check the box to indicate you agree to use electronic records and signatures, then click **Continue**.

c. Click **Start** to begin the signature process.
d. Click on the **Sign** option under ‘Required – Sign Here’

![Signed contract image]

**LOYOLA UNIVERSITY MARYLAND, INC.**

**Date of Agreement:** Monday, November 14, 2016

**Signed:**
- **Representing:** Official Representing Loyola University (410) 617-3643
- **Signed:** Official Representing 107 Square Feet Inc 11/14/2016

*(Please Sign and Return One Copy for Our File)*

![Sign option button]

**e. Choose a signature style and click **Adopt and Sign**.**

![Adopt Your Signature dialog]

**f. Click **FINISH** at the bottom or upper right when done.**

**g. You may select **No Thanks** when asked to sign up for a DocuSign account.**
Check the Progress of Contract Creation and Approval

To check your progress on the contract creation, look at the menu on the left of the contract page. Green checkmarks and circles indicate completed sections. Gray checkmarks or circles indicate incomplete sections.
To check the progress of the contract approval, click on the **Approvals** section on the left menu.
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Search the Contracts Database

1. To search contracts, click on Contracts from the left menu, then Search Contracts.

2. From here, you have a few options:
   - Enter search terms, including Contract Name, number, summary, etc., then click the Enter/Return key or the magnifying glass.
   - Click on Enter/Return or the magnifying glass to view all contracts.
3. Refine the search results
   a. Narrow the search by clicking on an option in the menu on the left. *For example, view contracts with Pending Signature status.*

4. Sort the search results
   a. Click on an item from the Sort drop-down menu on the upper right to view contracts grouped according to number, name or date.
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Dictionary

TCM – Total Contract Management, the SciQuest module though which Loyola’s contract documentation with its vendors is created and managed. Questions about contracts and contract documents should be directed to Jen Wood, the final approver for all of Loyola’s contracts, jwood@loyola.edu.

Library – In TCM (Total Contract Management), libraries contain examples of Loyola’s contract paragraphs, terms and conditions and other required clauses. They can be used Loyola-wide but generally are organized by Department so users may choose selections appropriate for the particular contract they are creating.

Primary (First) Party – Always Loyola University Maryland.

Secondary Party – Vendor.

SciQuest – Loyola’s e-commerce vendor. It hosts, services and provides maintenance on Loyola’s Sourcing, e-Pro and Contract modules. Its name denotes its history as an early eProcurement vendor of primarily science and lab supplies.

Examples of Notification Emails Received by Approver

From: Loyola Procurement [mailto:loyolaprourement@sciquest.com]
Send: Thursday, September 29, 2016 1:34 PM
To: Nancy Wright <nwright@loyola.edu>
Subject: Contract No. 20170FFCAMP00010TECH Ready for Internal Review

1. Contract Ready for Internal Review

Dear Nancy Wright,

Contract No. 20170FFCAMP00010TECH is now ready for your review.

Use the link below to access the contract within the application as appropriate.

View Contract

Thank You,
Loyola University Maryland

Support Team Contact Information:
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2. Signature Requested on Contract

Loyola Contracts
contracts@loyola.edu

Nancy Wright,
Please DocuSign Saturday Test.pdf
Thank You, Loyola Contracts

3. Contract is Completed

A copy of the ratified contract is attached to the email as a .pdf, as a reference.

Loyola Contracts
contracts@loyola.edu

All parties have completed Signature request on Contract TestNancy.
If you have any questions, please contact:

Jennifer Wood
Director – Campus Services
jwood@loyola.edu
410-617-5070

Nancy Wright
Assistant Director – Procurement
nbwright@loyola.edu
410-617-1354