CONGA USER GUIDE

Contract Requesters

Revision: 5.28.2021

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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, 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.

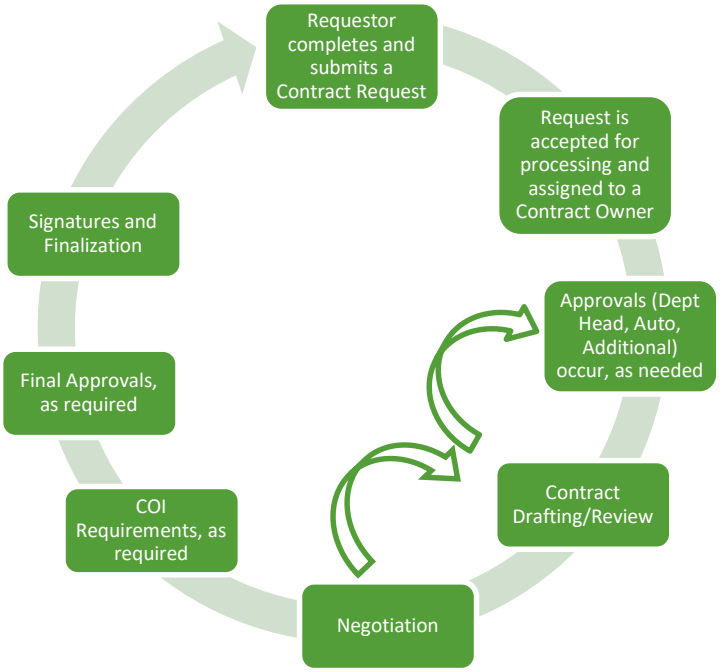
Contract Process Stages

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.

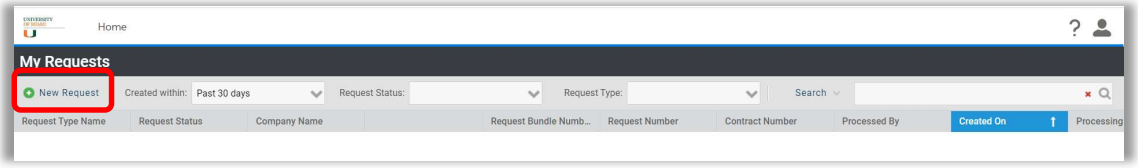
5. **Workday-Initiated Request Form** – This form is to be used for requests that have first been initiated in Workday. **This request form should never be selected directly from within Conga.** Rather, when you submit a purchase requisition in Workday that has an associated contract, your request will 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.

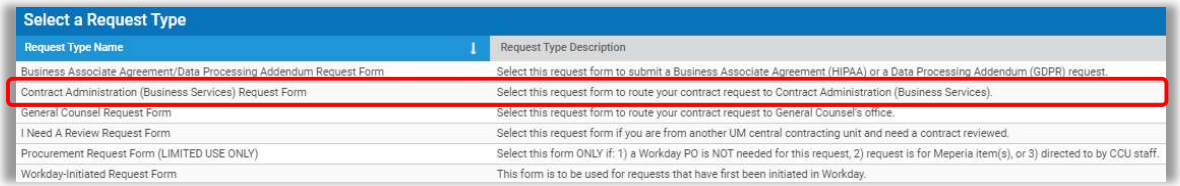
6. **I need a Review Request Form** – Select this form only if you work for a Central Contracting Unit and are making a request on behalf.

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.



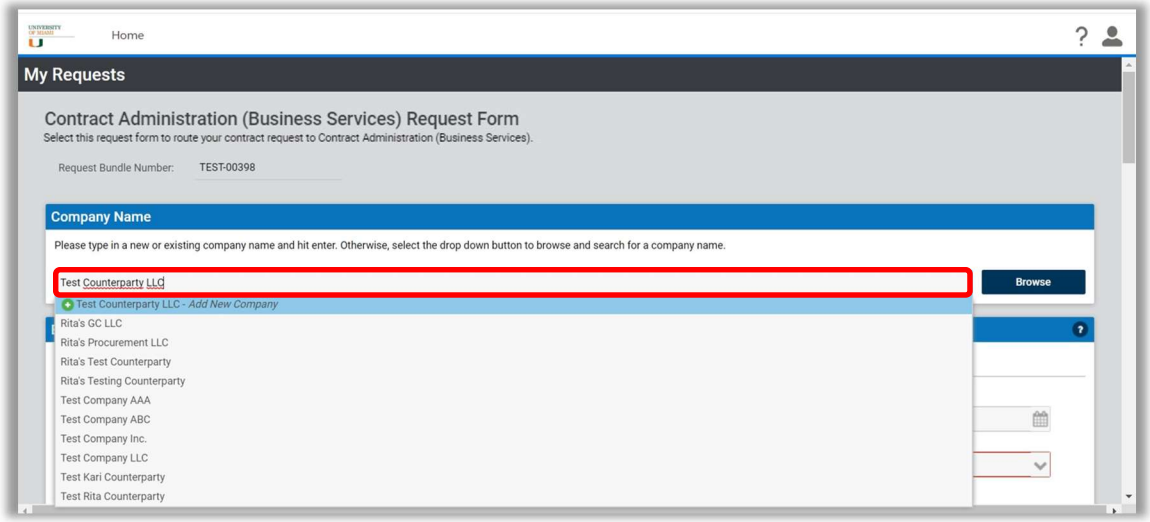
3. Select **Contract Administration (Business Services) Request Form**.



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.



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.

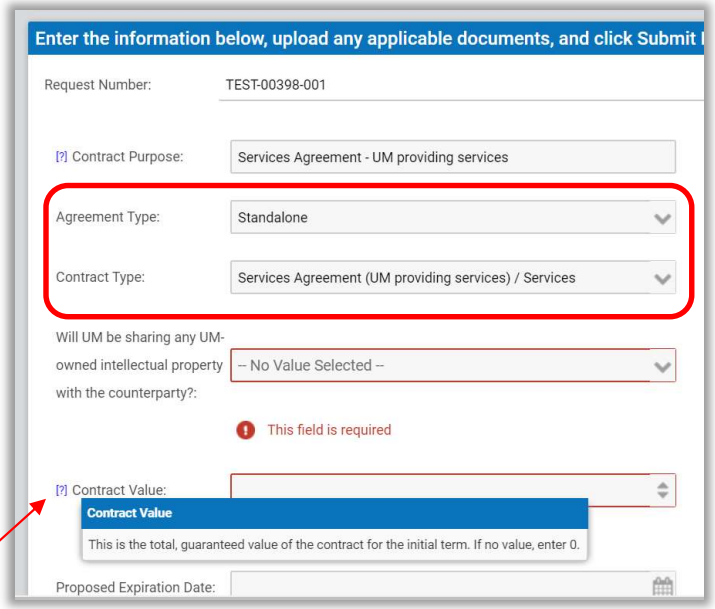
TIP: All fields in request forms that are **required** are outlined in **red**.

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.

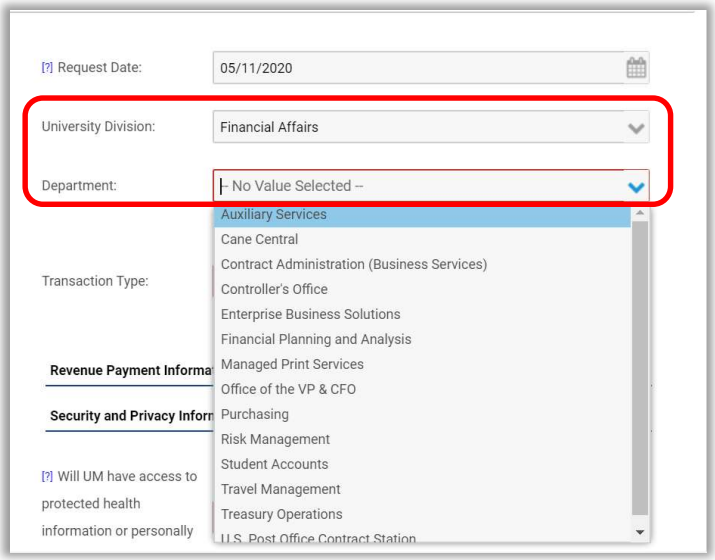
Contract Type defines the type of agreement (e.g., Services, Confidentiality). Some Contract Types have more than one level, e.g., Services Agreement (UM providing services).



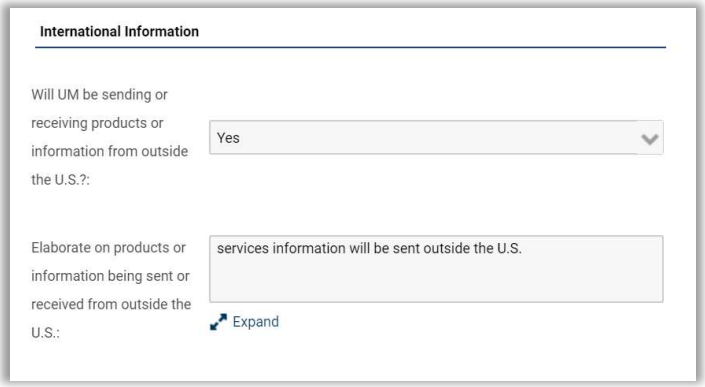
Mouse over **[?]** to reveal **Quick Tips** regarding the data field.

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.



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

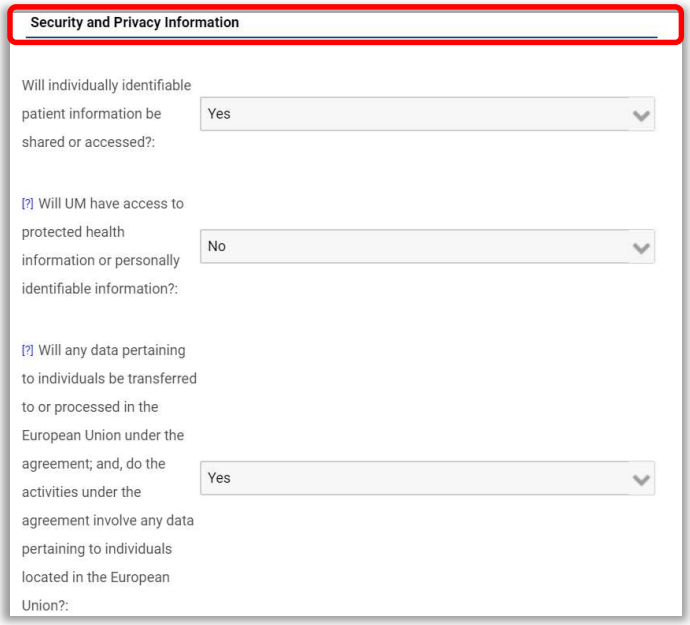


Security and Privacy questions appear when applicable.

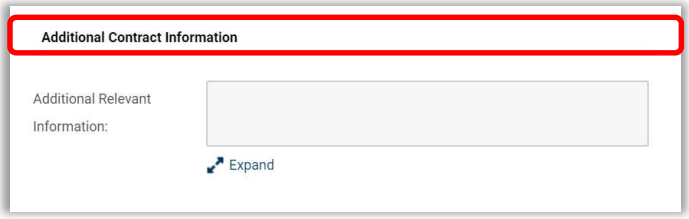
If you answer **Yes** to "*Will individually identifiable patient information be shared or accessed?*", Conga will send you an email notification indicating you must use the Business Associate Agreement/Data Processing Addendum Request Form to request a **Business Associate Agreement**.

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 involved 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!

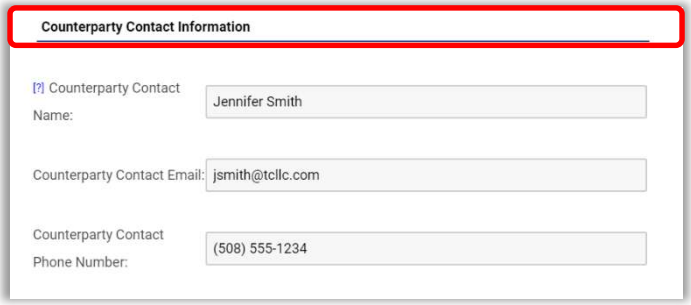


Use the **Additional Relevant Information** field to capture any additional information about the contract you are requesting that was not captured above.



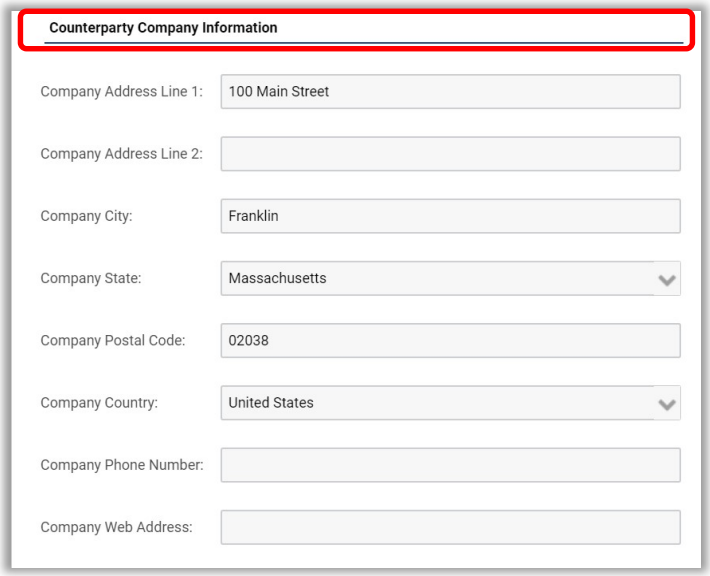
6. Complete all fields in the request form that pertain to the **Counterparty**.

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

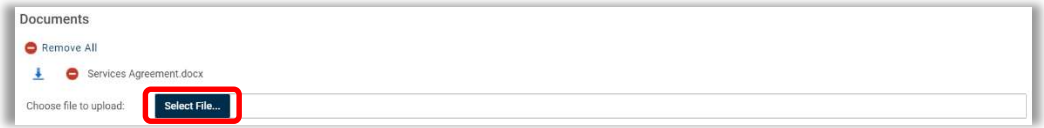


If the Counterparty is **new**, you are required to complete the data fields in the **Counterparty Company Information** section.

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

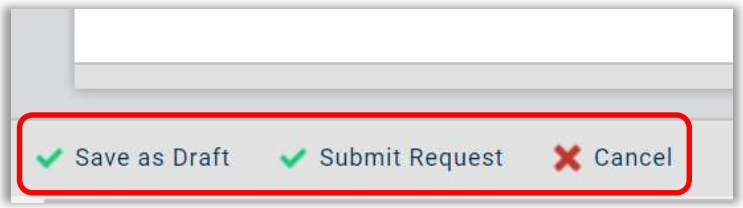


7. In the **Documents** section, you may upload all documents related to your request.
    a. UM always prefers to draft the contract. However, if the Counterparty has provided a draft, the draft provided
    b. Supporting documents
    c. Master Agreement (*if you are requesting an amendment, attachment 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.



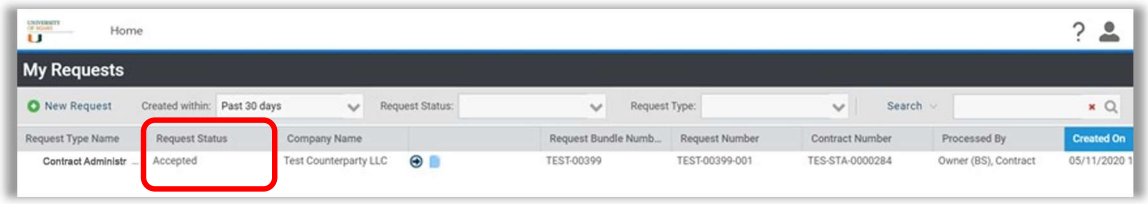
9. Beyond the Documents section, **Additional Data Forms** with additional, unique data fields may appear based on the Contract Type you selected.

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.

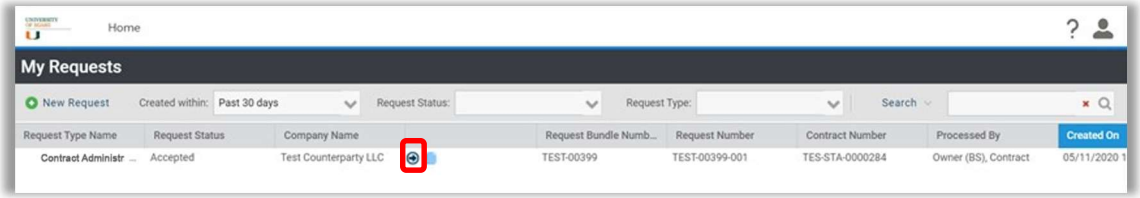


12. Once your request has been processed by a Contract Owner in Contract Administration, you will receive an **email notification** from Conga indicating that your request has been received. The email indicates who processed the request – a named User from Contract Administration.

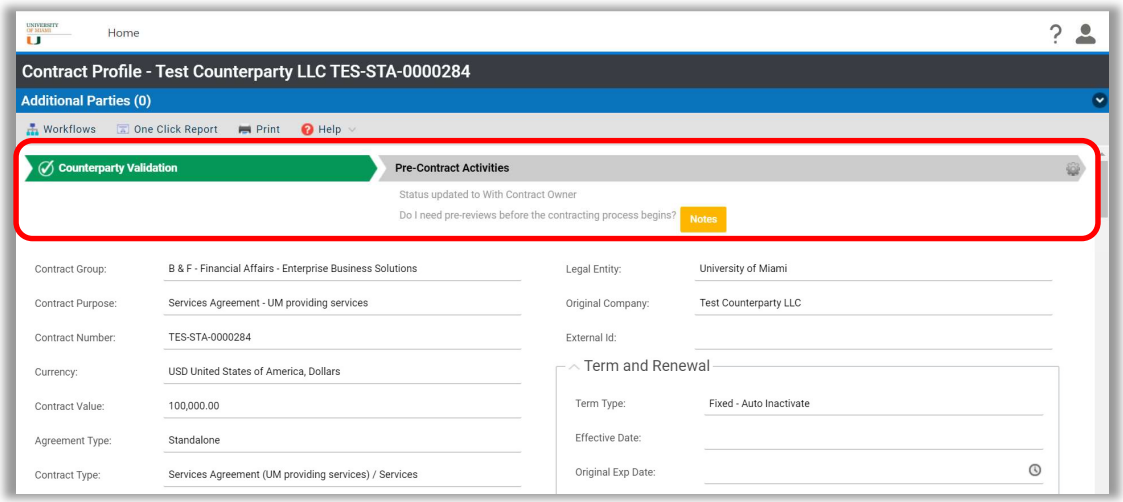
TIP: "Received" means that a Contract Owner in the CCU has received your request for review and evaluation. "Received" does not mean that your contract is ready or signed.

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

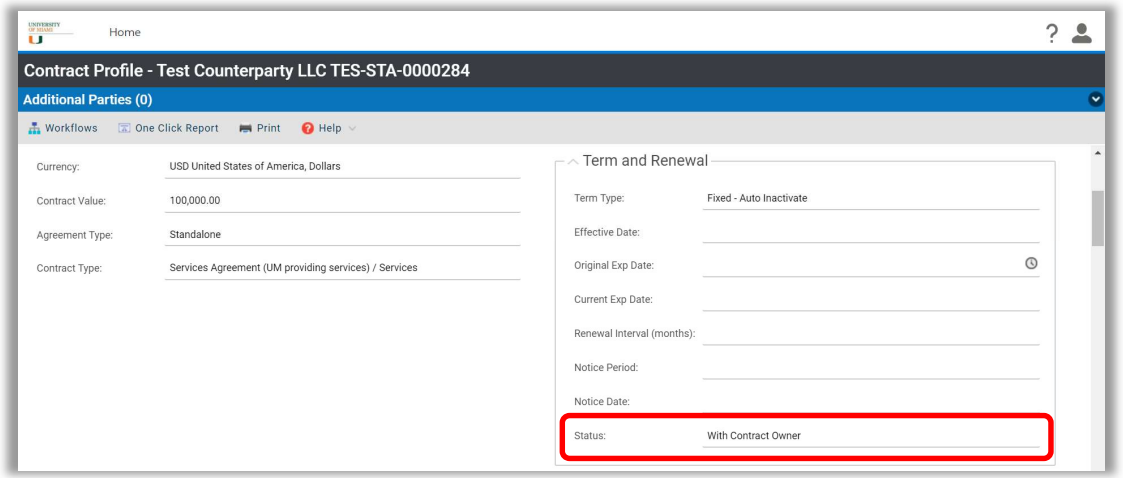
14. Click the **Go to Contract** icon ( ) on the relevant contract in order to navigate to the Contract Profile (i.e., contract record).



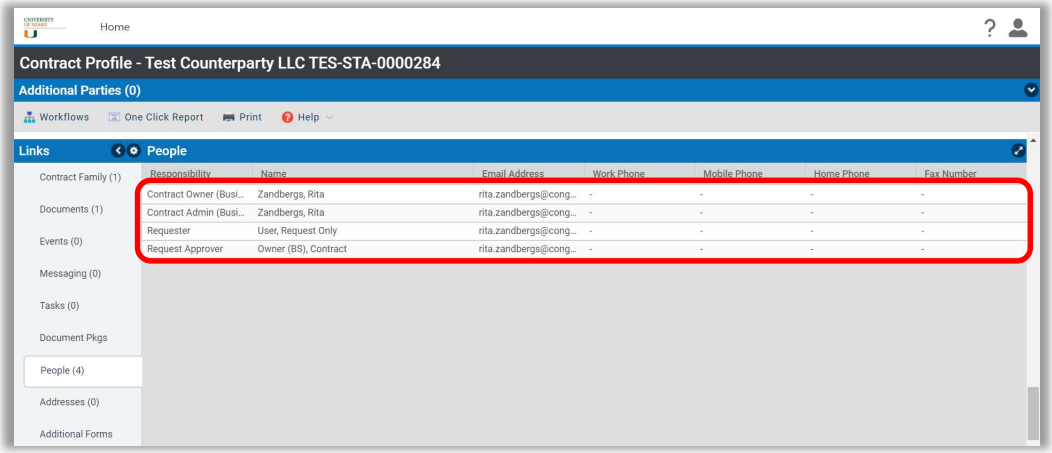
15. In the Contract Profile, you can view the contract as it moves through all the **Stages** of the contract process.



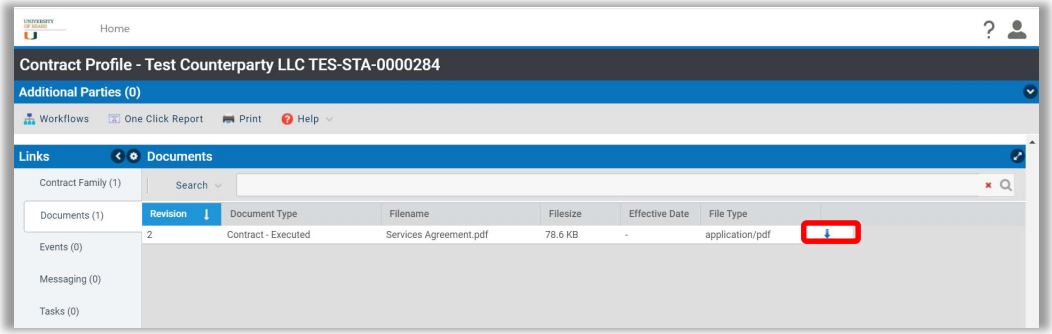
16. You can also view the **Status** in the Term and Renewal section of the Contract Profile:



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**.



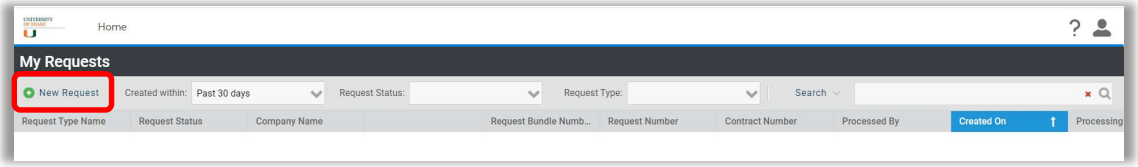
b. When the contract process has been completed, you will receive an email notification from Conga informing you that the contract has been signed and is now active. The signed contract is stored in **Documents**. Click on the link in the email notification to log into Conga, go to Documents and use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



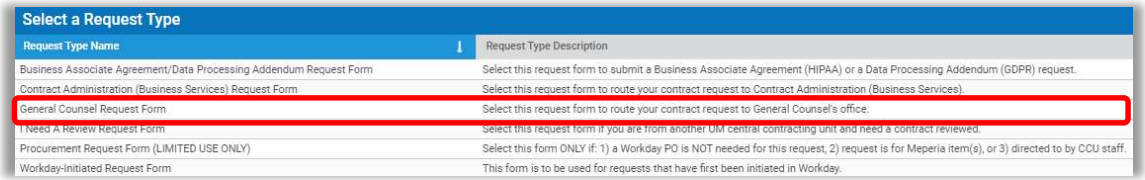
18. During the contracting process, you may receive email communications through the Messaging tool from the Contract Owner, including requests to provide additional information, review the contract and/or send it to the Counterparty. Additional information regarding the Messaging tool can be found here: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



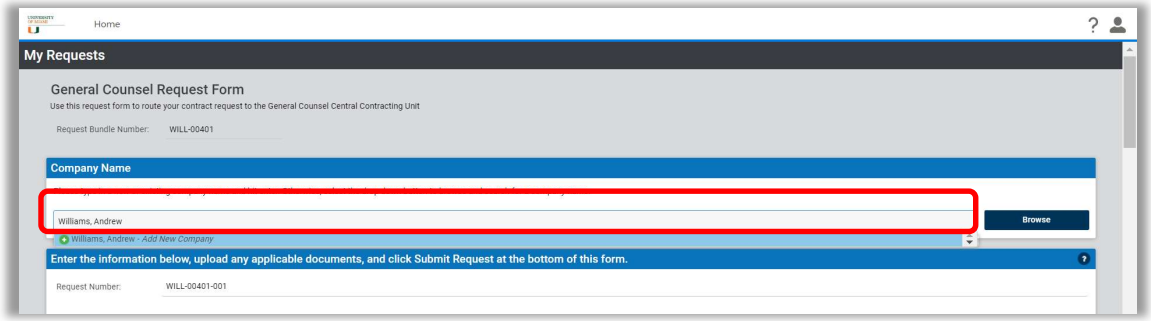
3. Select **General Counsel Request Form**.



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.



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

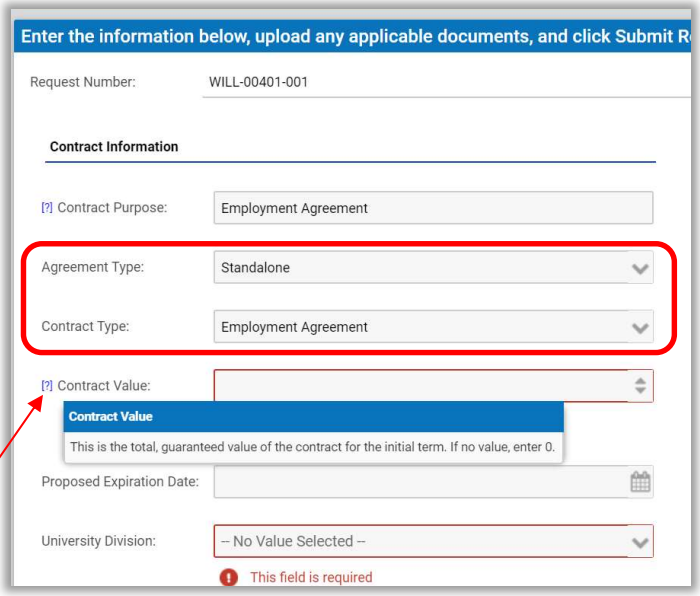
5. **Complete all fields in the request form that pertain to the contract you are requesting**. The form is divided into sections. The main section contains common fields that are always visible and/or required. Data fields in sections that contain a "header" (e.g., Revenue Payment Information) only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

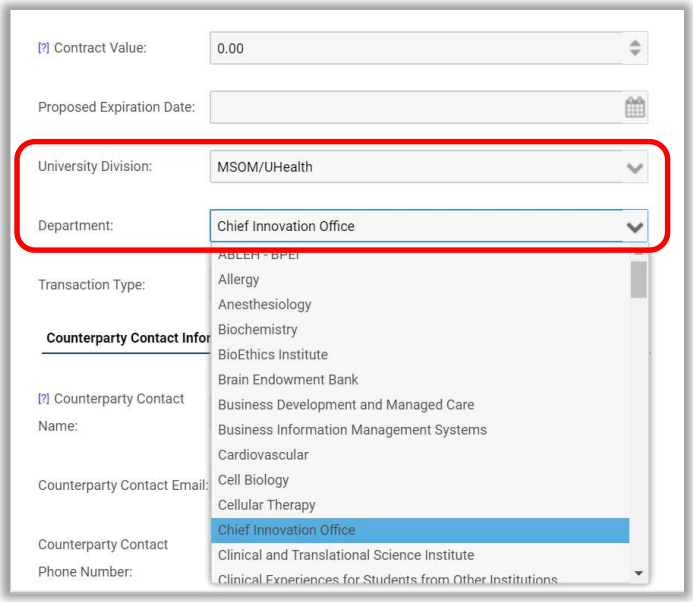
Agreement Type defines if a contract is a Root/Parent (e.g., Master) or Incorporated/Child (e.g., Amendment) agreement. Root agreement types are in bold. Incorporated agreement types are not. When you select an Incorporated Agreement Type, a Related Agreement Information field opens.

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.



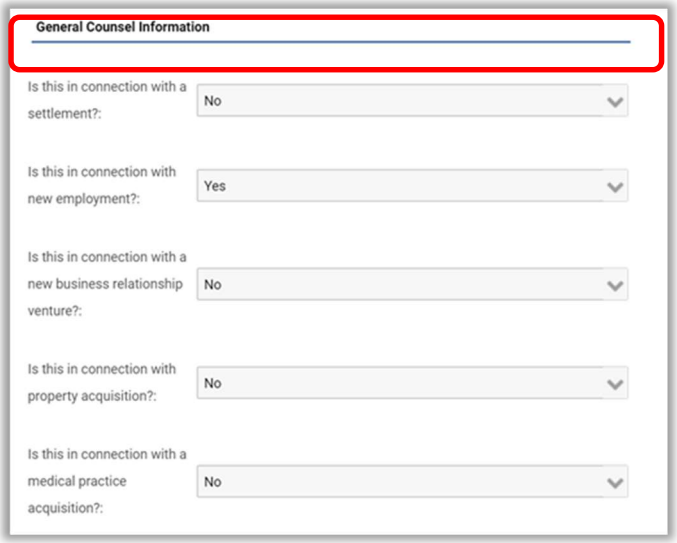
Mouse over **[?]** to reveal **Quick Tips** regarding the data field.

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.

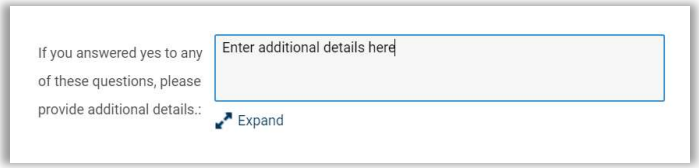


Request Date automatically populates with today's date.

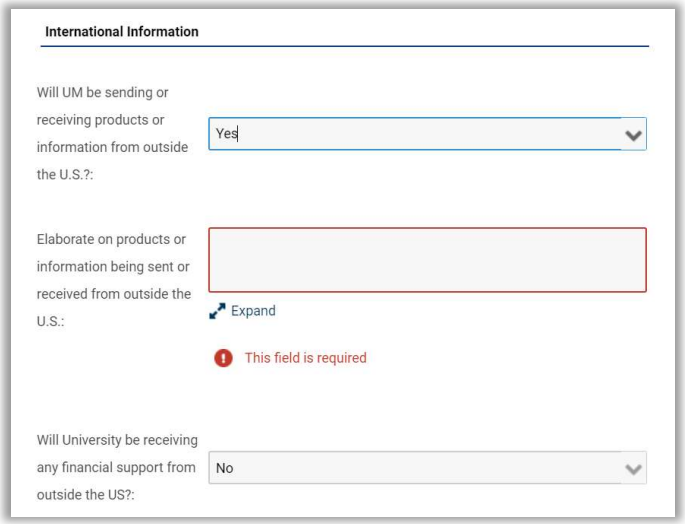
The **General Counsel** Request Form contains a list of unique questions, all of which are required, except when your Contract Type is Separation Agreement or Retirement Agreement.



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



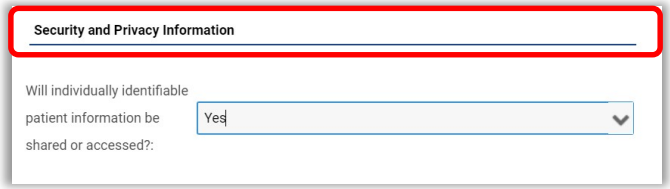
Some fields require that you elaborate on your answer to the prior question.



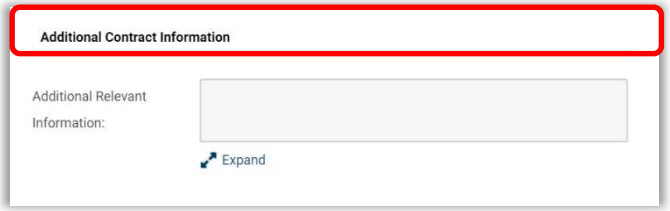
Security and Privacy questions appear, when applicable.

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!

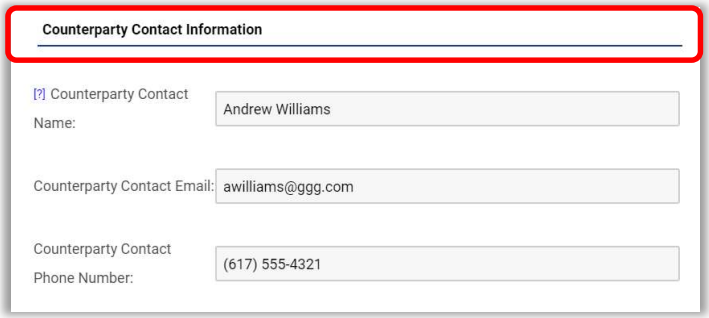


Use the **Additional Relevant Information** field to capture any additional information about the contract you are requesting that was not captured above.



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

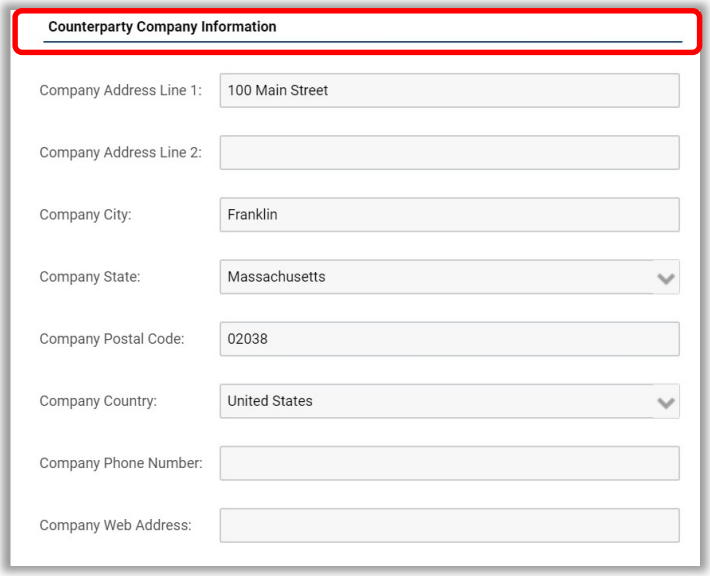
Enter contact details for your main point of contact at the Counterparty in the **Counterparty Contact Information** data fields.



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.

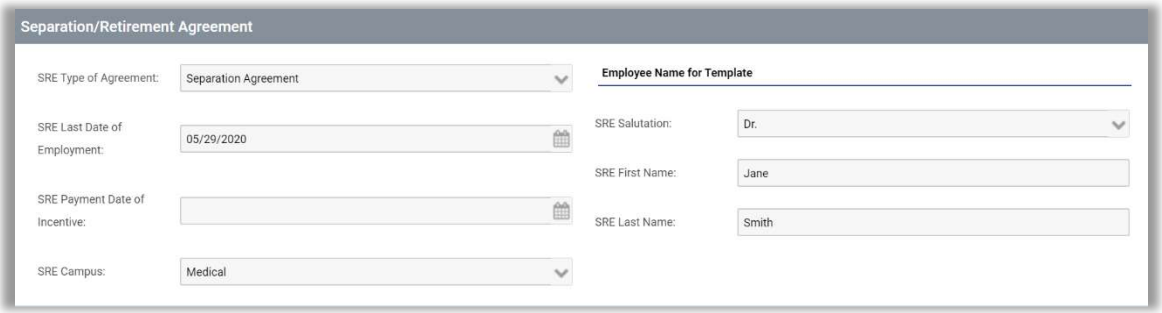
Complete the additional fields in this section when creating a new Counterparty.



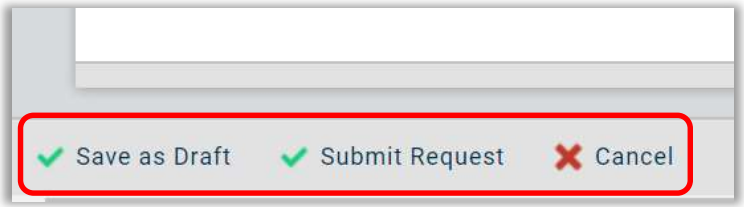
7. In the **Documents** section, you may upload all documents related to your request.
    a. UM always prefers to draft the contract. However, if the Counterparty has provided a draft, the draft provided
    b. Supporting documents
    c. Existing Agreement (*if you are requesting an amendment, attachment 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**

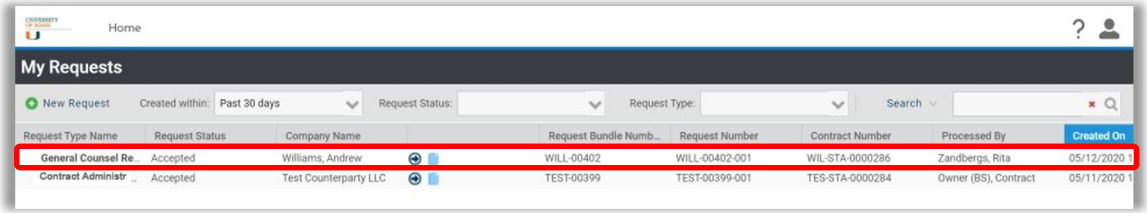


10. When you are ready to submit the request form, click **Submit Request** at the bottom of the screen. If you are not ready to submit the request form, click **Save as Draft**. The request form is saved to My Requests and you may re-open, edit and submit the request at a later time. If you want to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

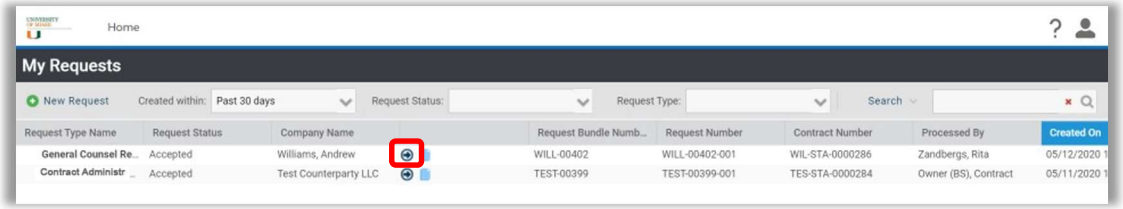


12. Once your request has been processed by a Contract Owner in the General Counsel office, you will receive an **email notification** from Conga indicating that your request has been received. The email indicates who processed the request – a named User from the General Counsel office.

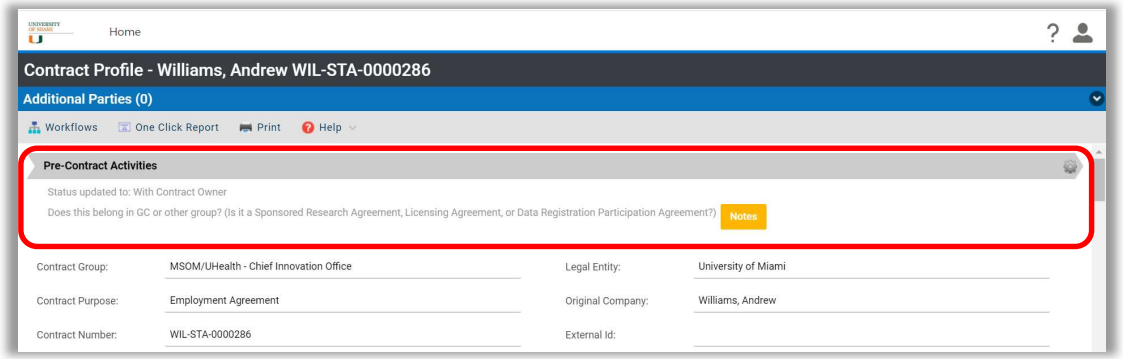
TIP: Received means that a Contract Owner in the CCU has received your request for review and evaluation, and that status of the Request is now *Accepted*. **Received does not mean** that your contract is ready or signed.

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

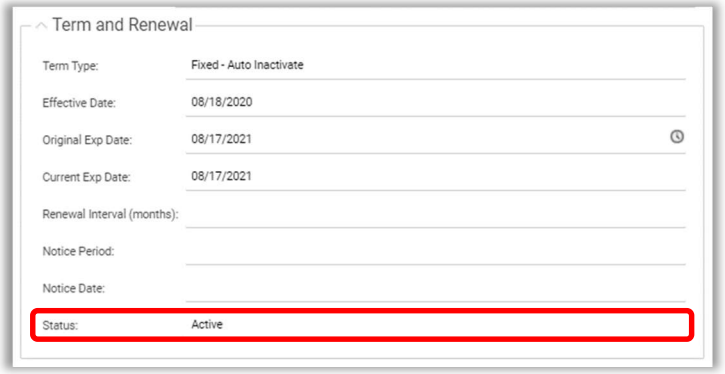
14. Click the **Go to Contract** icon ( ) on the relevant Request to go to the Contract Profile (i.e., contract record).



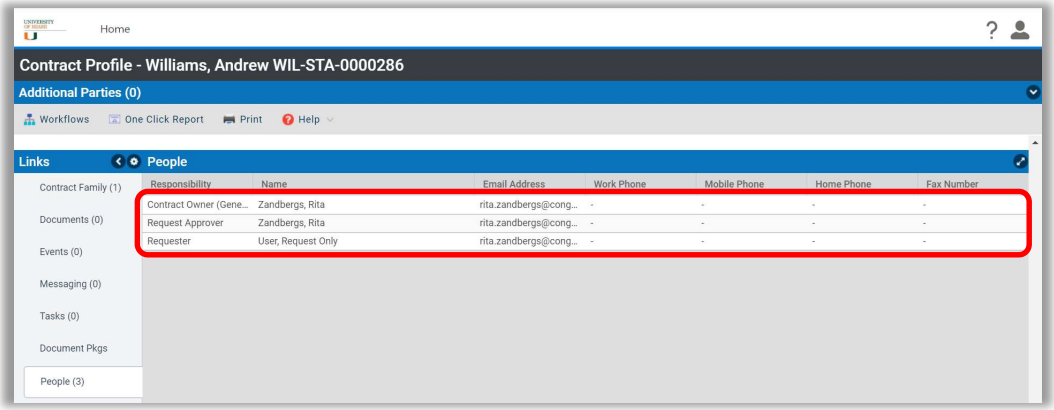
15. In the Contract Profile you can view the contract as it moves through all the **Stages** of the contract process.



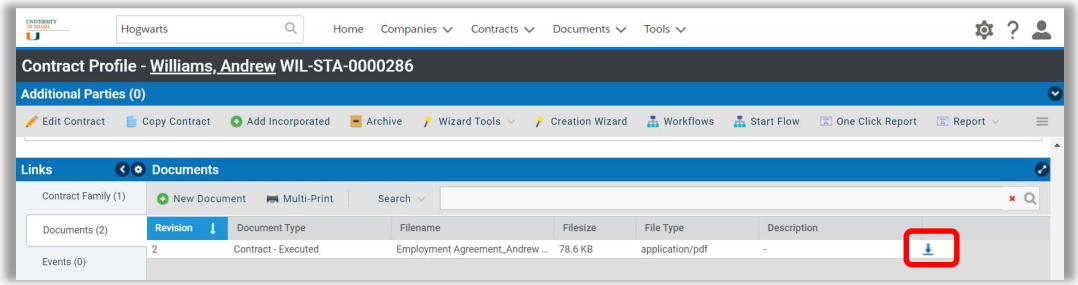
16. In the Term and Renewal section of the Contract Profile, you can view the **Status** of the contract.



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**.



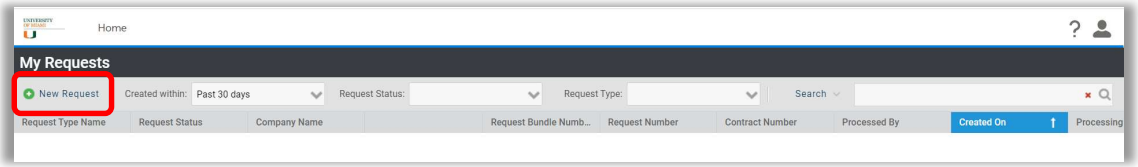
    b. When the contract process has been completed, you will receive an email notification from Conga informing you that the contract has been signed and is now active. The signed contract is stored in **Documents**. Click on the link in the email notification to log into Conga, go to Documents and use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



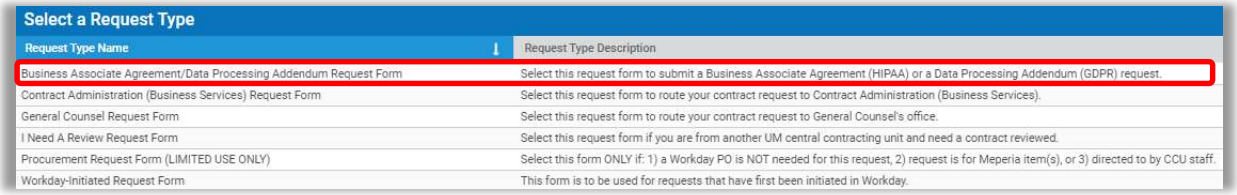
18. During the contracting process, you may receive email communications through the Messaging tool from the Contract Owner to provide additional information, review the contract and/or send it to the Counterparty. Additional information regarding the Messaging tool is found here: Messaging.

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.

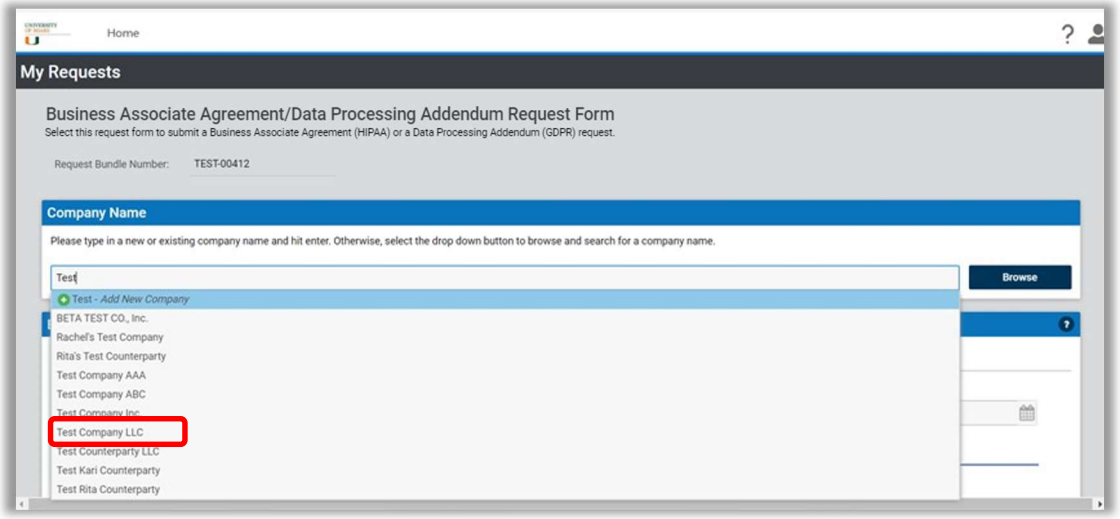


3. Select **Business Associate Agreement/Data Processing Addendum Request Form**.



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.



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

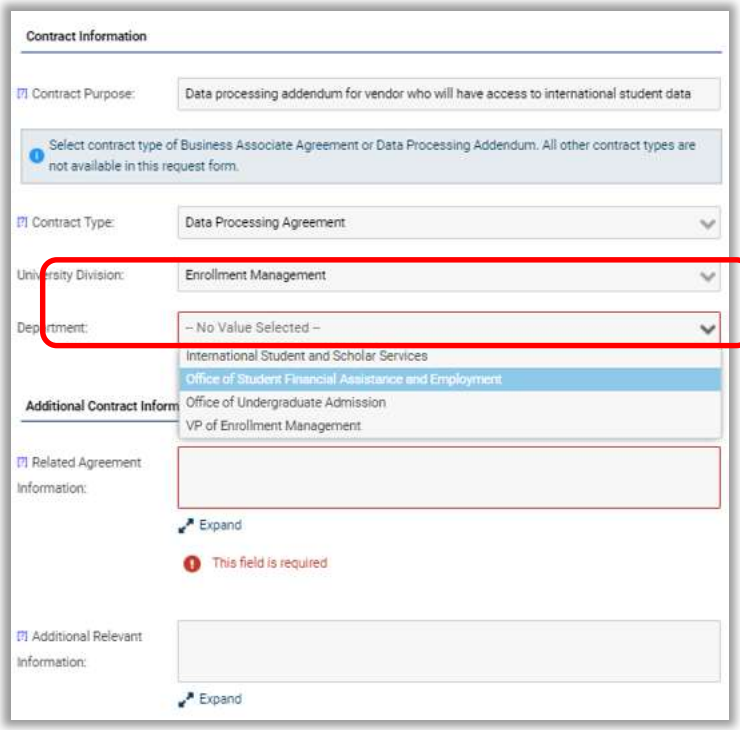
5. **Complete all fields in the request form that pertain to the contract you are requesting**. The form is divided into sections. The main section contains common fields that are always visible and/or required. Data fields in sections that contain a "header" only appear when the fields are relevant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

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

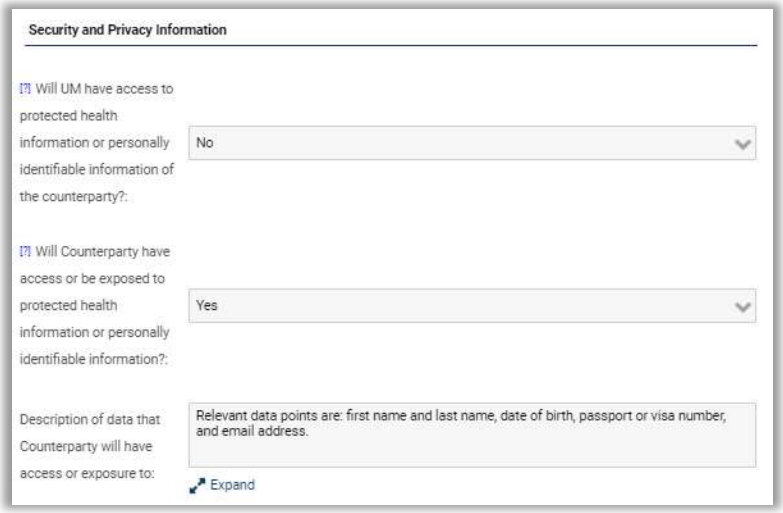
TIP: If you tab from field to field in the request form, you will be taken first through all of Column 1 and then to Column 2.

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.



Request Date automatically populates with today's date.



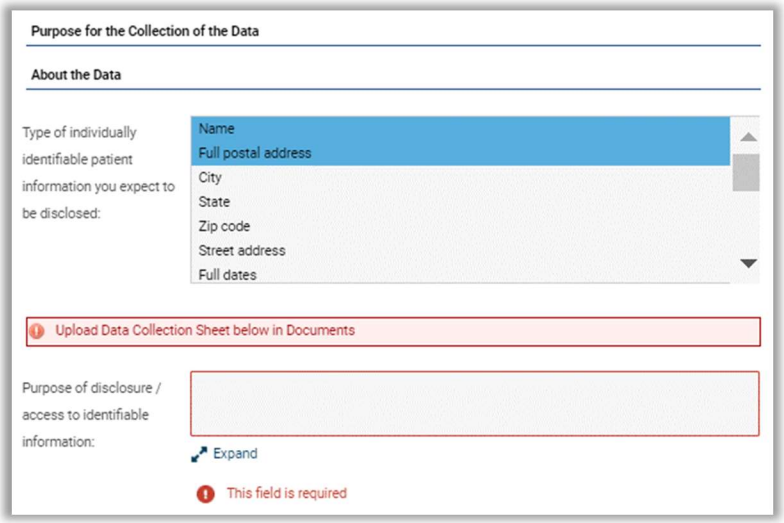
Some fields require that you elaborate on your answer to the prior question.

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**.

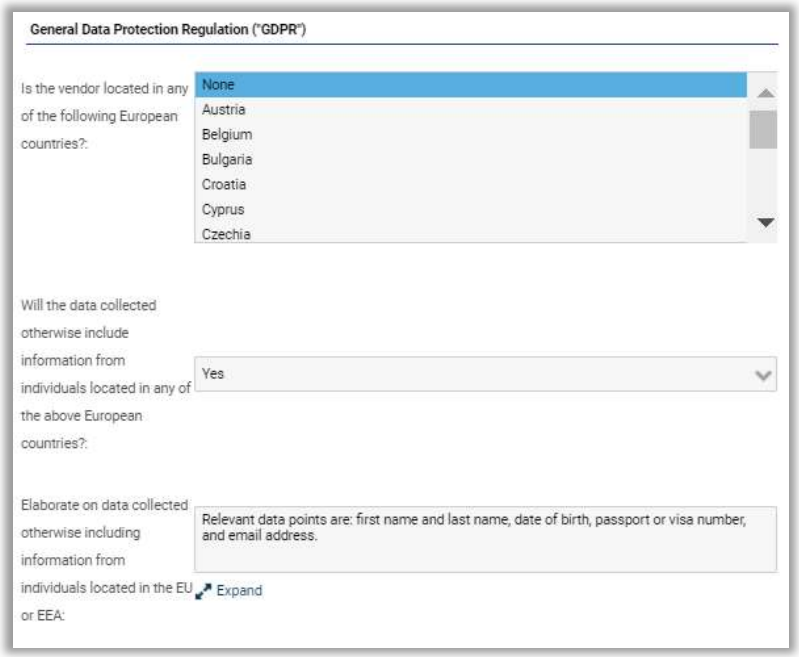
Some fields are multi-select and allow you to select more than one answer. Select all that apply.

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



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.



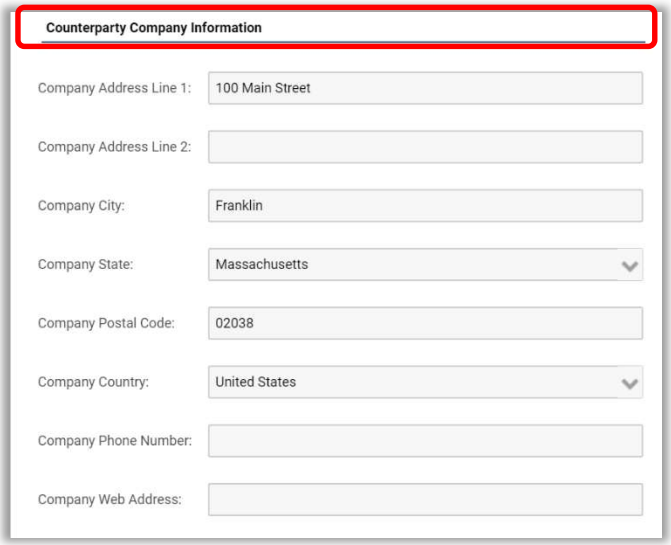
6. Complete all fields in the request form that pertain to the **Counterparty**.

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.

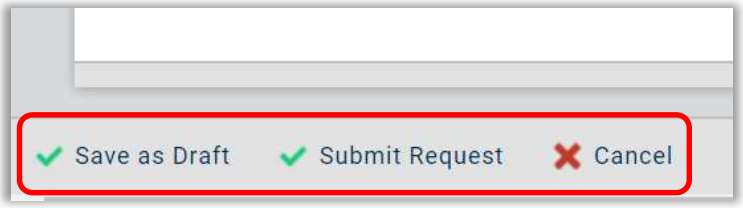
Complete the additional fields in this section when creating a new Counterparty.



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. 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**.



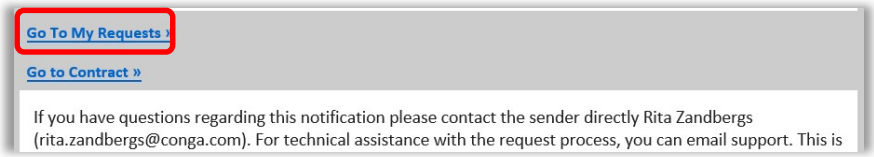
10. Upon submitting your request, you are returned to the **My Requests** screen, where you can view the status of your request.

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.

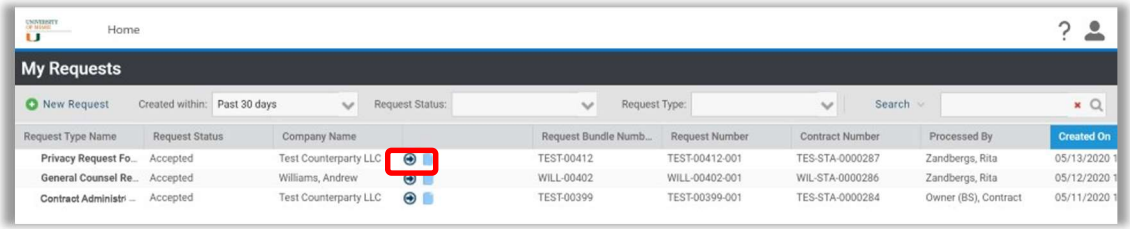
11. Once your request is processed by the system, you also receive an email notification from Conga indicating that your request has been received.

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.

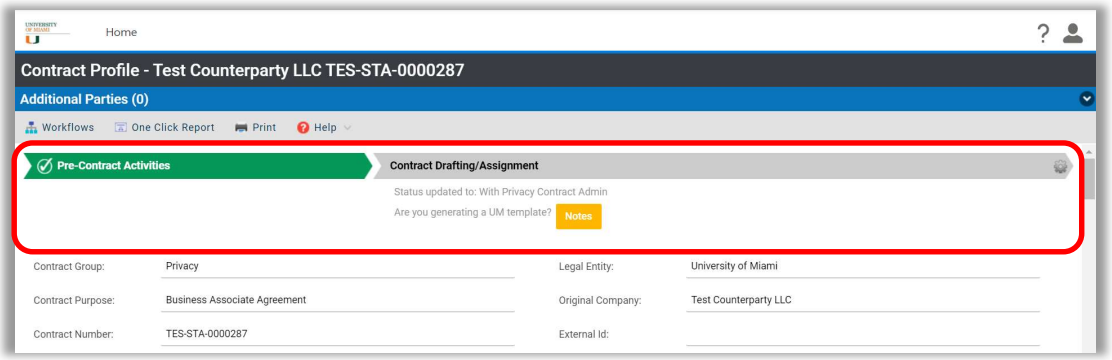
12. Click on the **Go To My Requests** button at the bottom of the email notification to log back into Conga.



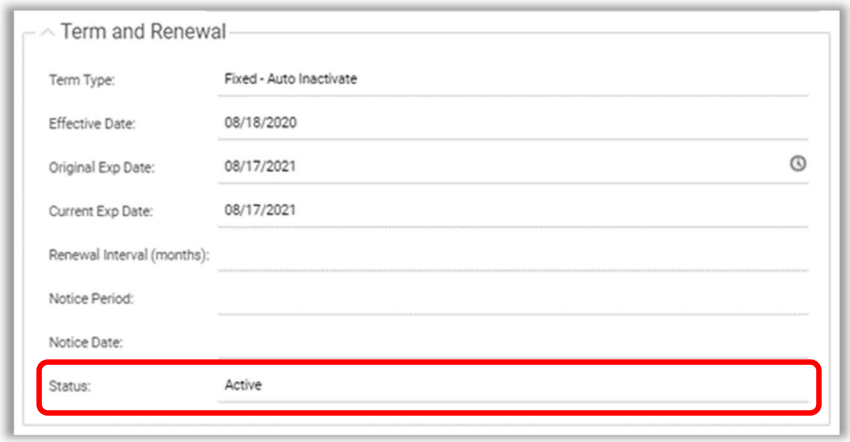
13. Click the **Go to Contract** icon ( ) on the relevant Request to go to the Contract Profile (i.e., contract record).



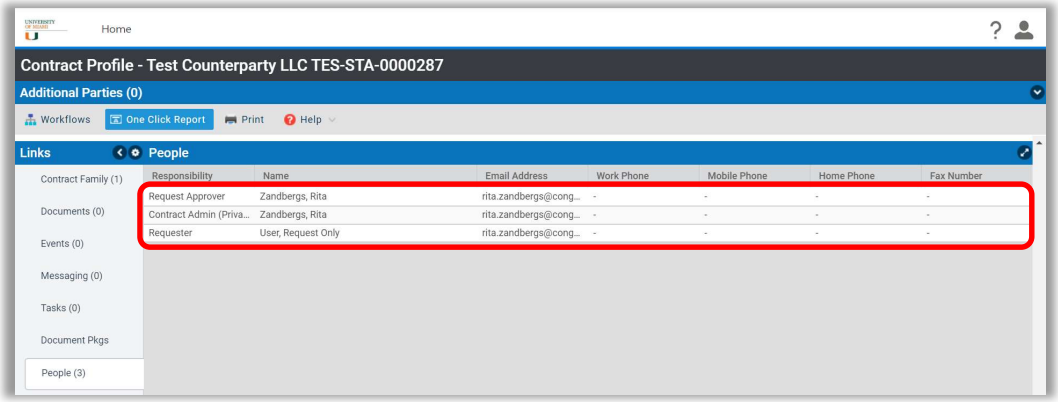
14. In the Contract Profile, you can view the contract as it moves through all the **Stages** of the contract process.



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



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**.



    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.

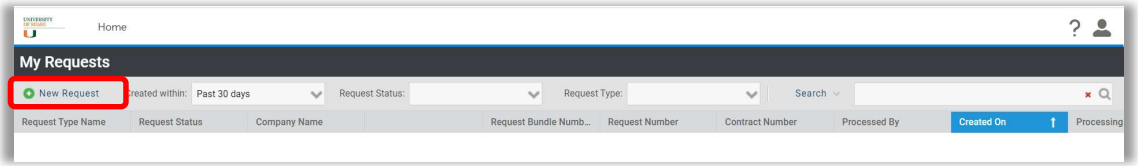
17. During the contracting process, you may receive email communications through the Messaging tool from the Contract Owner to provide additional information, review the contract and/or send it to the Counterparty. Additional information regarding the Messaging tool is found here: Messaging.

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

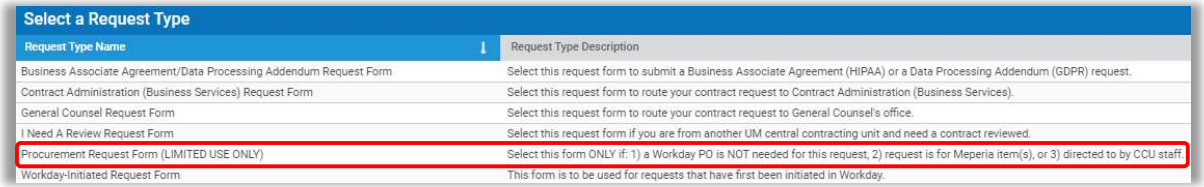
Select this form ONLY if: 1) a Workday PO is NOT needed for this request, 2) your request is for Meperia item(s), or 3) you are directed to by CCU staff. This request form is used to seek contract review from Sourcing Teams within Procurement.

1. Log into Conga Contracts.

2. On your My Requests dashboard, click **New Request** to open the list of Request Types.



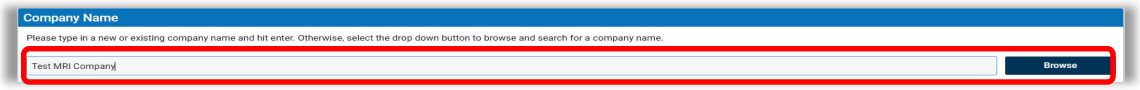
3. Select **Procurement Request Form (LIMITED USE ONLY)**.



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.

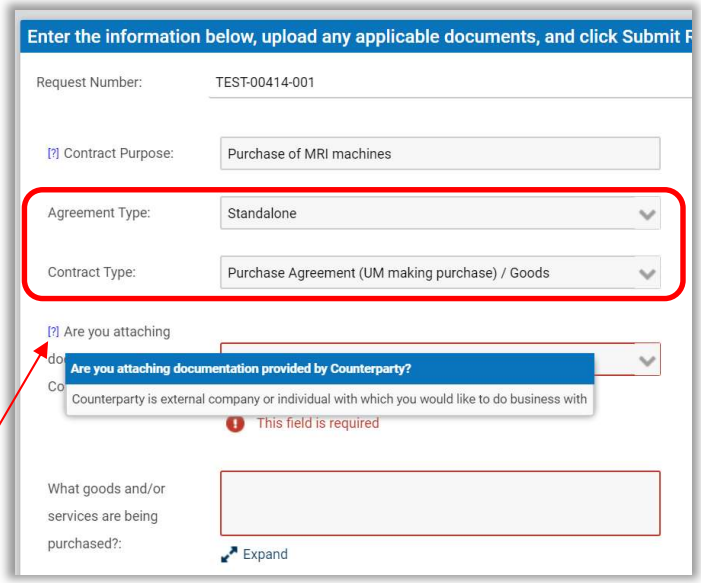
5. **Complete all fields in the request form that pertain to the contract you are requesting**. The form is divided into sections. The main section contains common fields that are always visible and/or required. Data fields in sections that contain a "header" (e.g., Procurement Information) only appear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

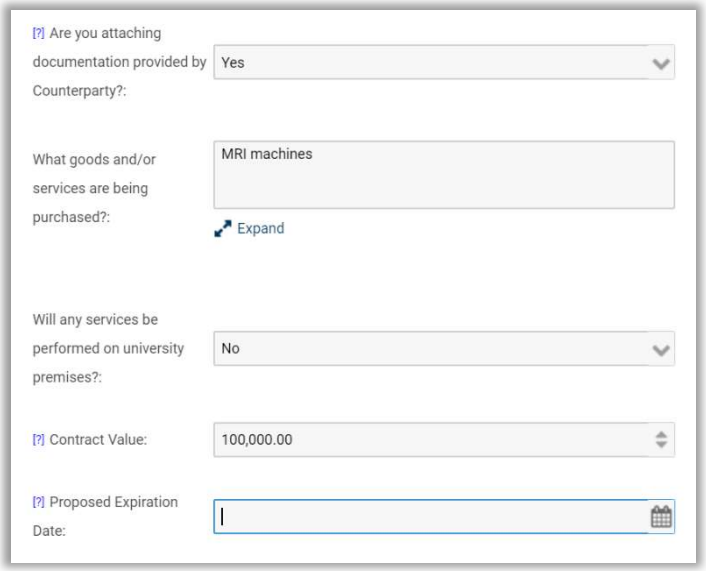
Agreement Type defines if a contract is a Root/Parent (e.g., Master and Standalone) or Incorporated/Child (e.g., Amendment) agreement. Root agreement types are in bold in the drop-down list. Incorporated agreement types are not. When you select an Incorporated Agreement Type, a Related Agreement Information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



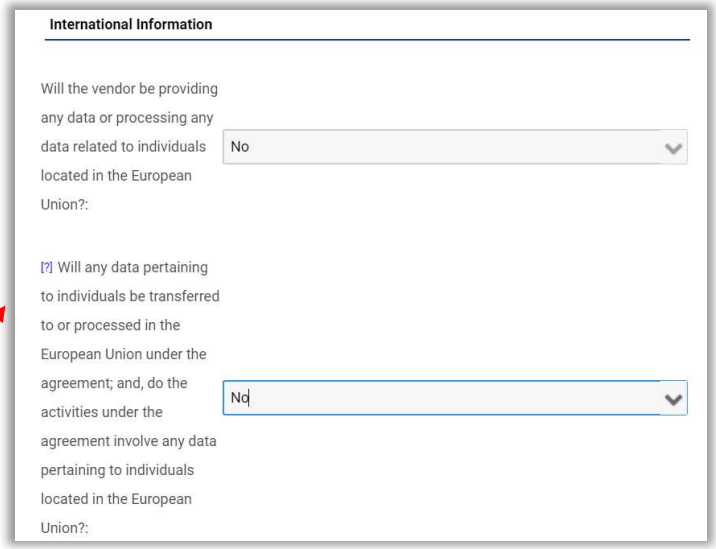
Mouse over **[?]** to reveal **Quick Tips** regarding the data field.

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.



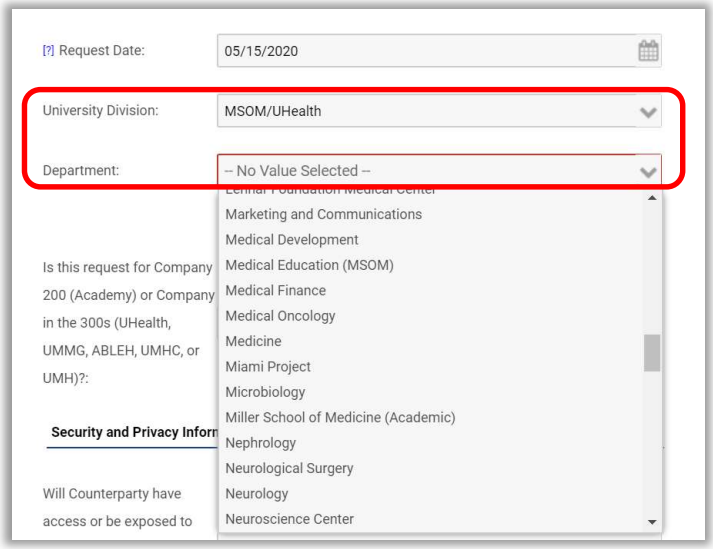
If you answer **Yes** to "*Will any data pertaining to individuals be transferred to or processed in the European Union under the agreement; and, do the activities under the agreement involved any data pertaining to individuals located in the European Union?*", Conga will send you an email notification 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.

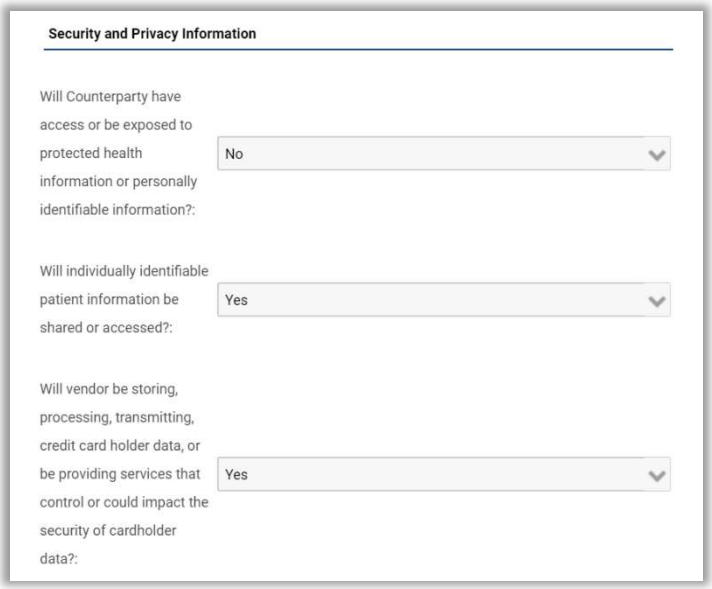


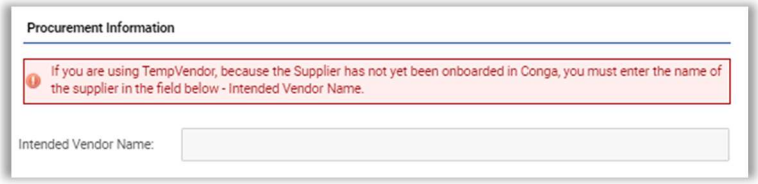
The value you select in this field (i.e., Company 200 or Company 300s) determines the Central Contract Unit to which your request is routed.

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!

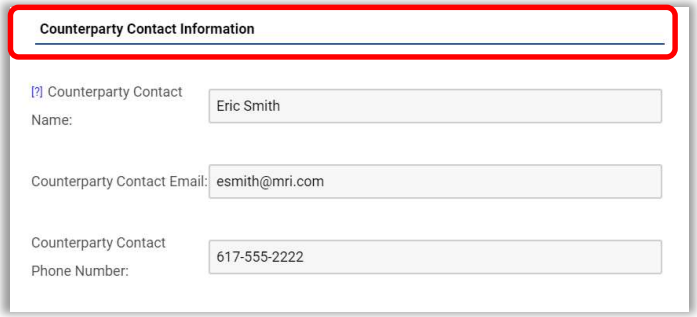




Use the **Additional Relevant Information** field to capture any additional information about the contract you are requesting that was not captured above.

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

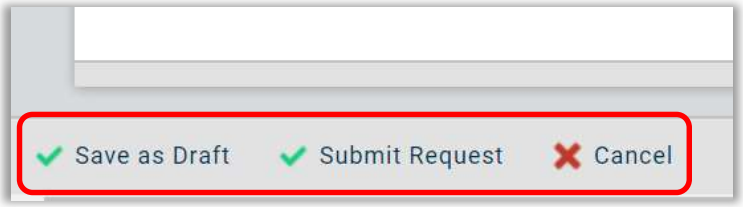
Enter contact details for your main point of contact at the Counterparty in the **Counterparty Contact Information** data fields.



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*))

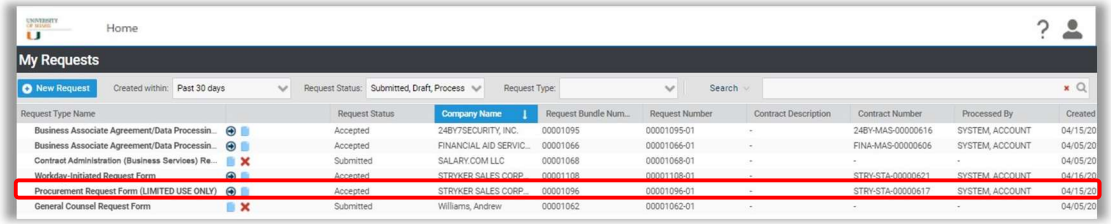
8. Click **Select File** to find and select the document on your computer and attach it to the request. Repeat, as needed.

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*.



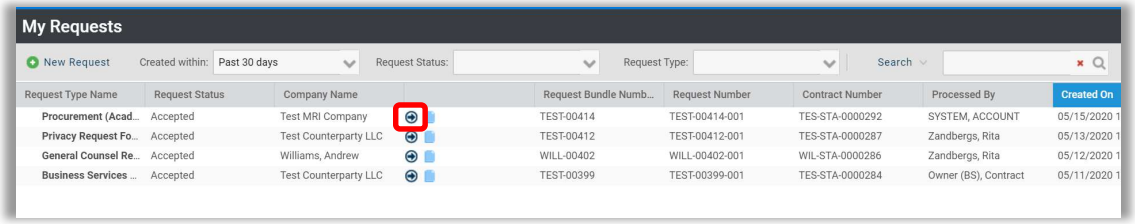
TIP: You may need to refresh the My Requests screen in order to refresh the Request Status of the Procurement Request from Submitted to Accepted.

11. 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.

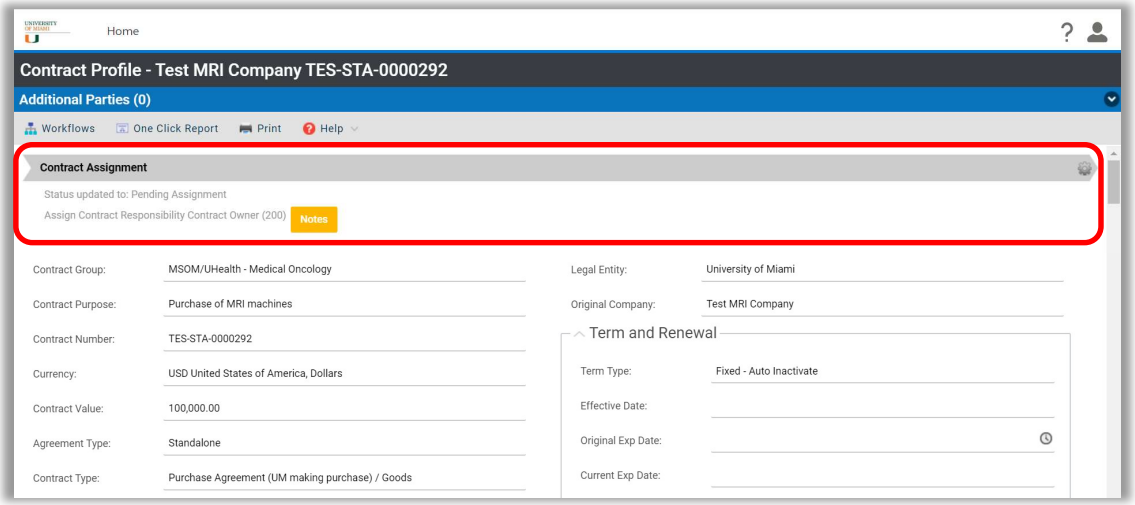
TIP: Received means that a Contract Owner in the CCU has received your request for review and evaluation, and that status of the Request is *Accepted*. **Received does not mean** that your contract is ready or signed.

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

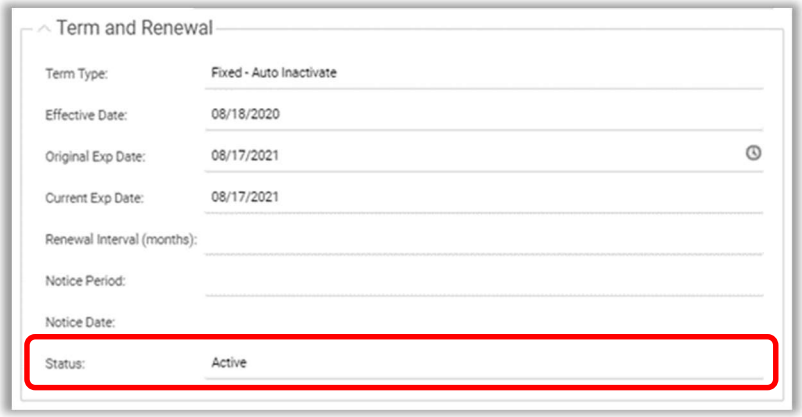
13. Click the **Go to Contract** icon ( ) on the relevant Request to go to the Contract Profile (i.e., contract record).



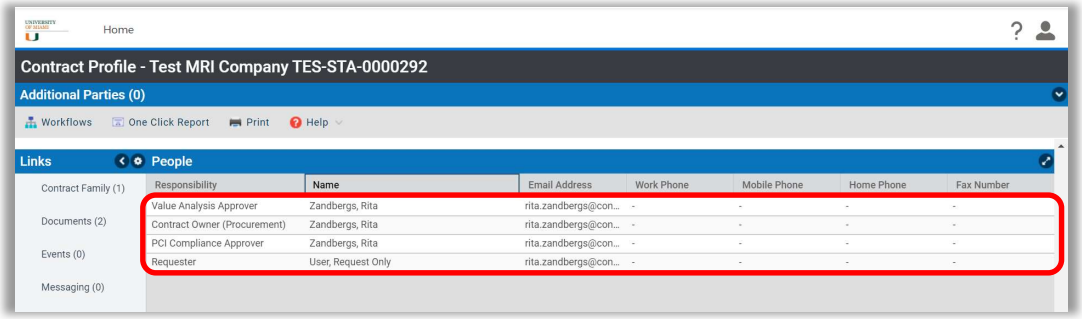
14. In the Contract Profile you can view the contract as it moves through all the **Stages** of the contract process.



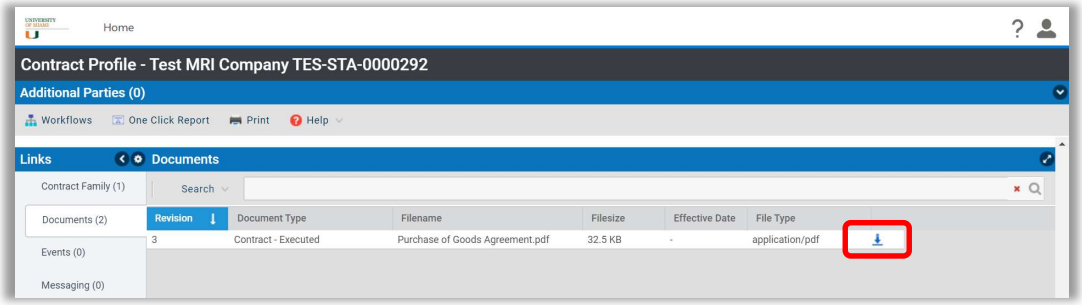
15. In the Term and Renewal section of the Contract Profile, you can view the **Status** of the contract.



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**.



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.

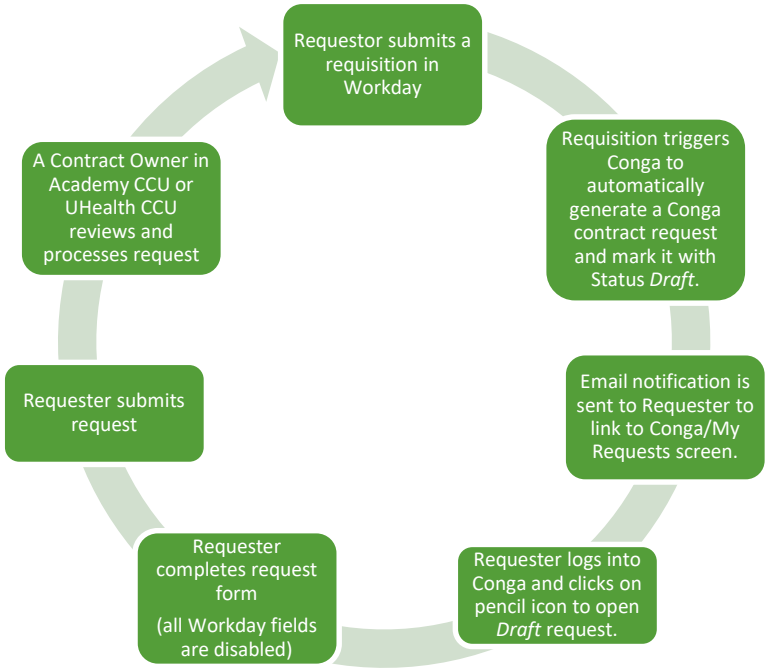


17. During the contracting process, you may receive email communications through the Messaging tool from the Contract Owner to provide additional information, review the contract and/or send it to the Counterparty. Additional information regarding how to respond to emails received from the Conga Messaging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

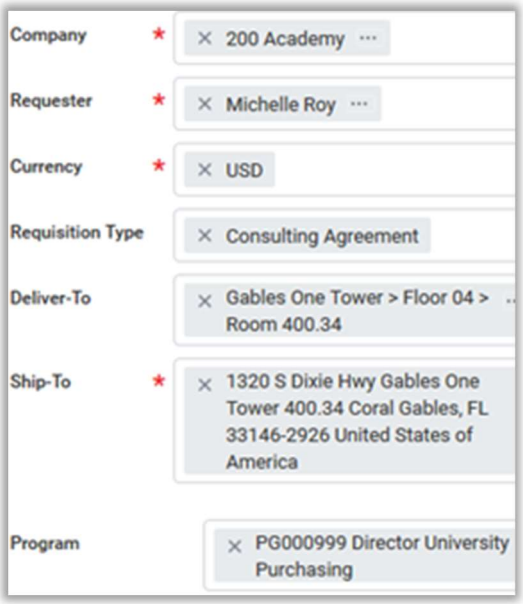
Workday-Conga Request Process Diagram



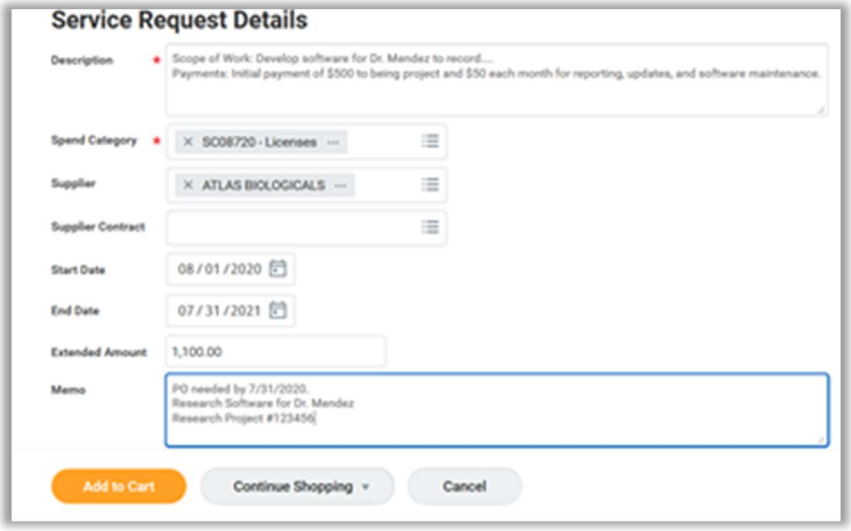
Standard Request

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



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)



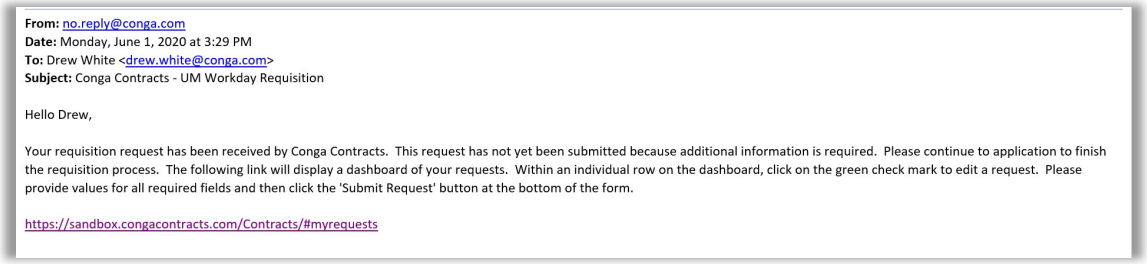
15. Select one of the following Non-Catalog Request Types.
    - ***Request Services*** *– Services or Goods with multiple invoices to be paid.*
    - ***Request Goods*** *– Goods with only one invoice to be paid*
16. ***Description*** (services) or ***Item Description*** (goods)
    - Include the scope 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 "3rd 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.



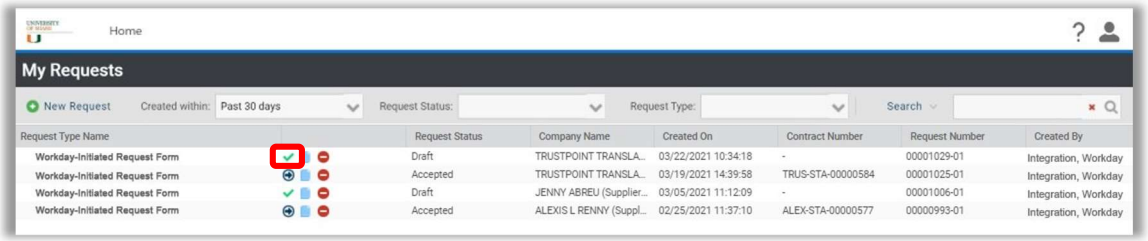
From: no.reply@conga.com
Date: Monday, June 1, 2020 at 3:29 PM
To: Drew White <drew.white@conga.com>
Subject: Conga Contracts - UM Workday Requisition

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.

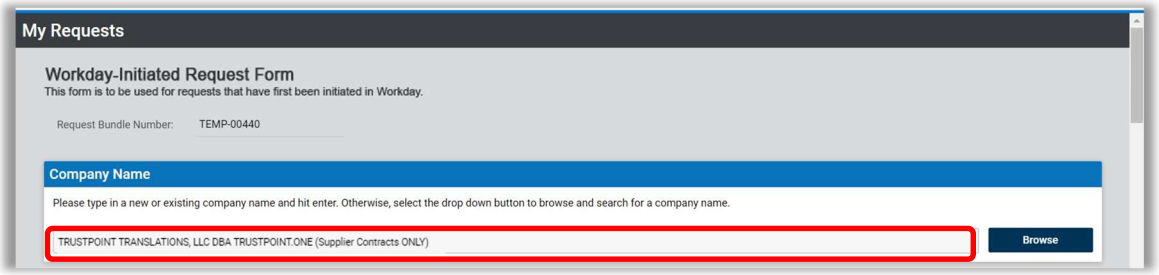
https://sandbox.congacontracts.com/Contracts/#myrequests

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

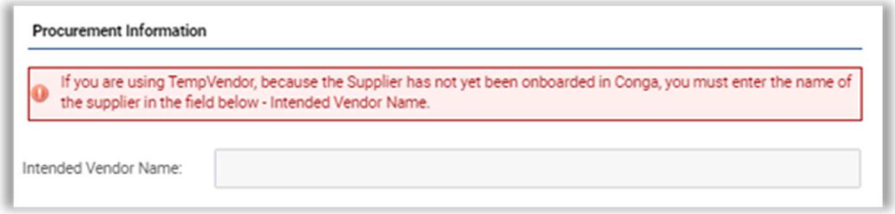


Click on the green check mark to open the request. Some of the data that you provided in Workday has been automatically populated in the Conga request form. These fields are disabled, because Workday is the source of truth for this information and users are not allowed to edit it.

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.



- **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.



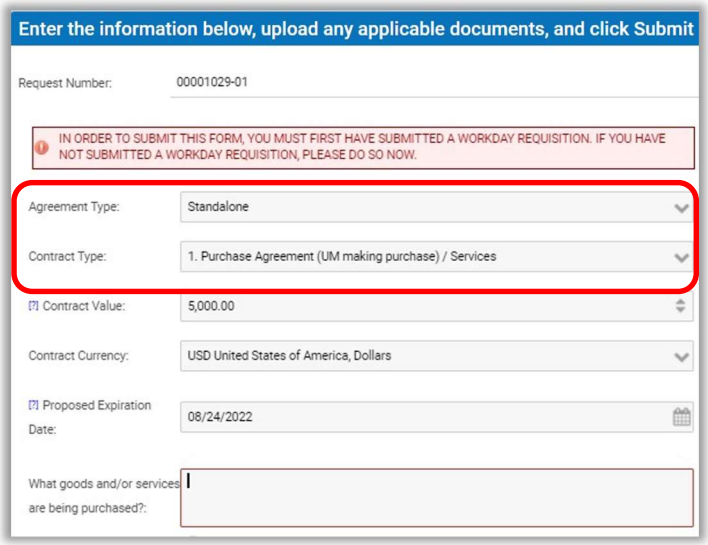
47. **Complete all fields in the request form**. The form is divided into sections. The main section contains common fields that are always visible and/or required.

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.

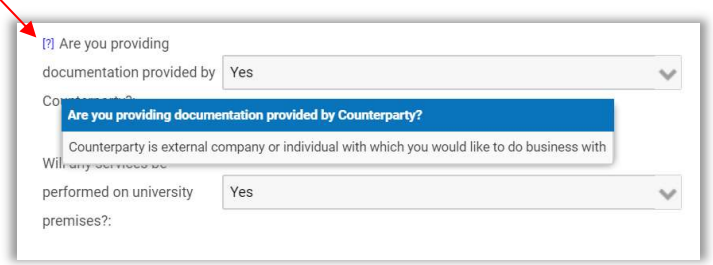
Contract Type defines the type of contract (e.g., Services, Confidentiality). Some Contract Types have more than one level, e.g., Services Agreement (UM providing services). Ensure you select a sub-type to the lowest possible level, if required.



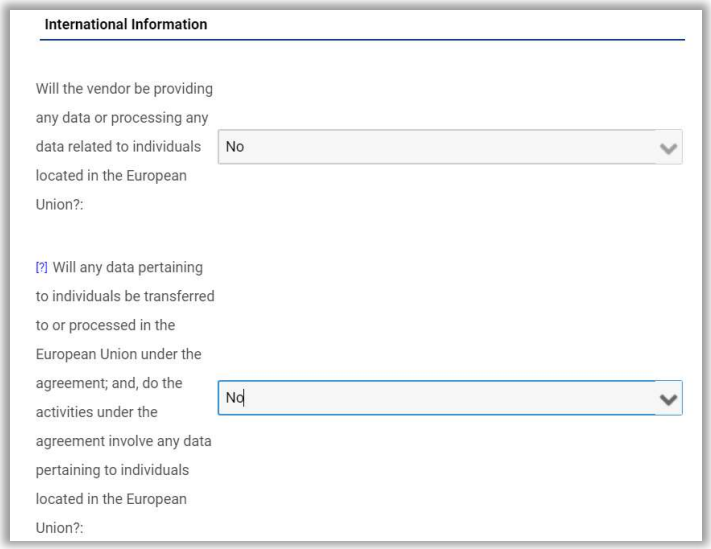
Mouse over **[?]** to reveal **Quick Tips** regarding the data field.

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.**

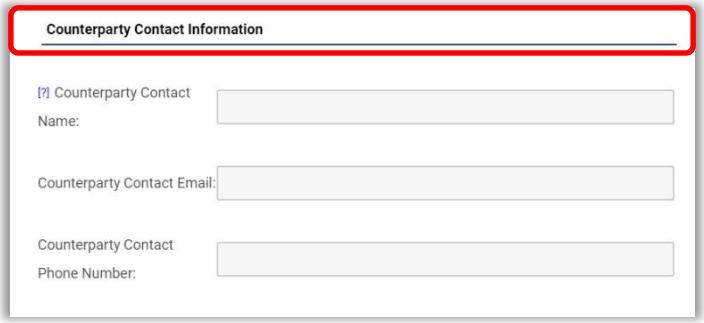
The system will not provide a pop-up alert if you forget an attachment.



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 involved 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**.

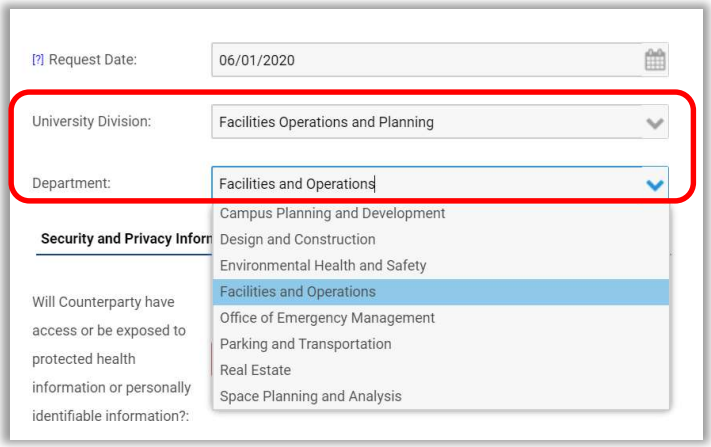


Enter contact details for your main point of contact at the Counterparty in the **Counterparty Contact Information** data fields.



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

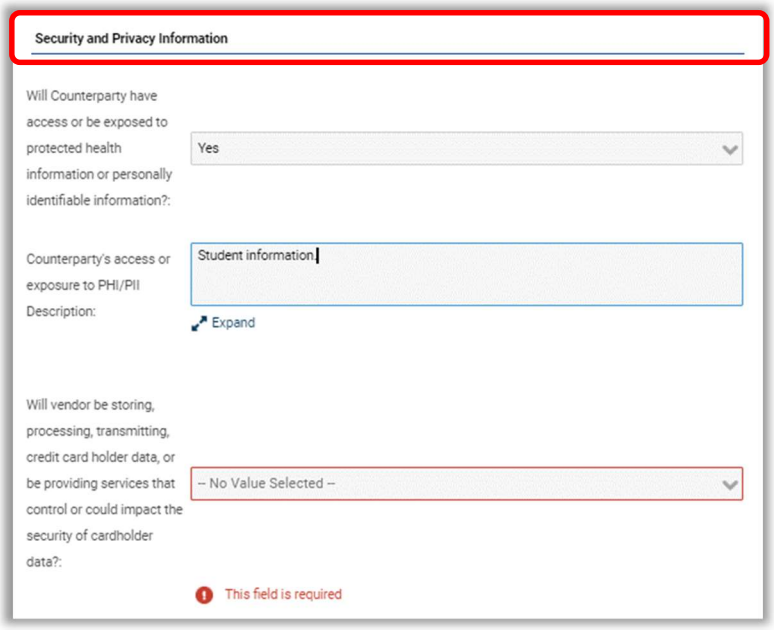
Select the **University Division** and **Department** for which the contract is being requested. University Division and Department fields are linked. The value you select in University Division drives the choices in Department.



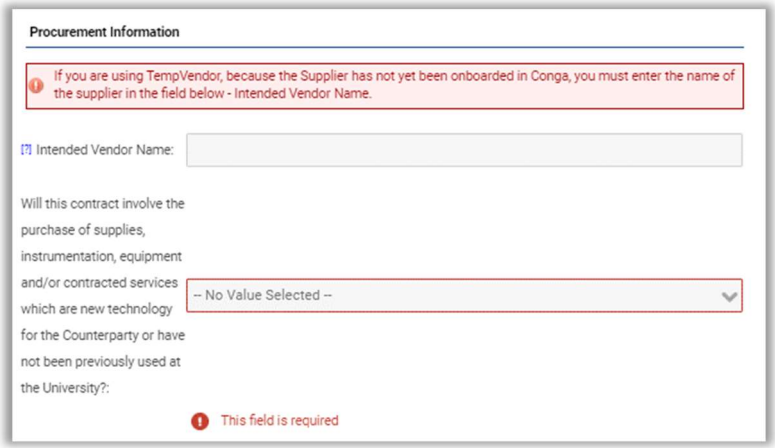
Security and Privacy questions appear, when applicable.

If you answer **Yes** to "*Will Counterparty have access or 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**.

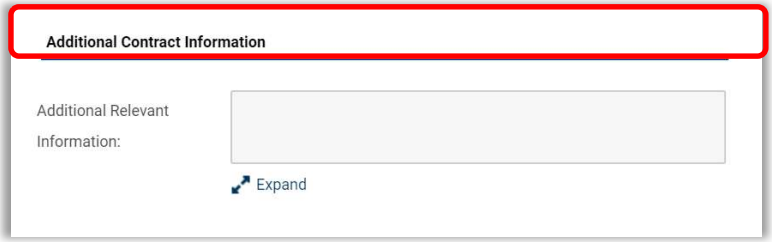
Watch for this email notification!



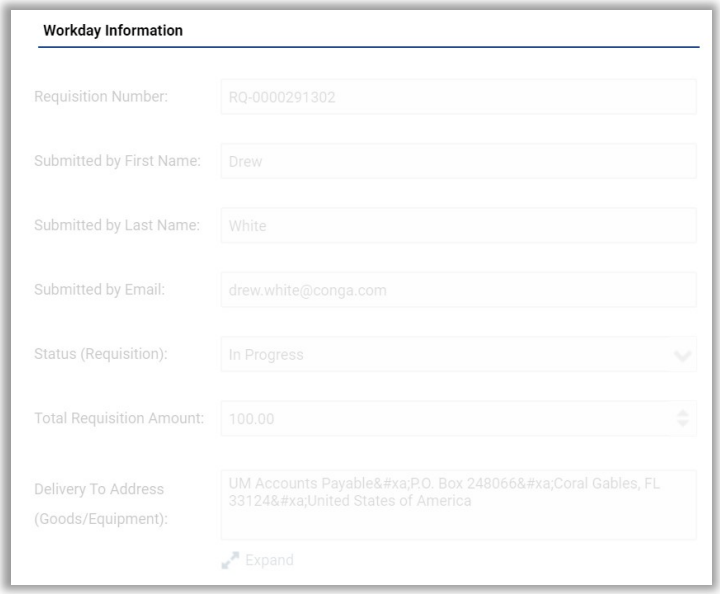
If Company Name is TempVendor, because the Supplier is not yet in Conga, enter the name of the Supplier in the **Intended Vendor Name** field.



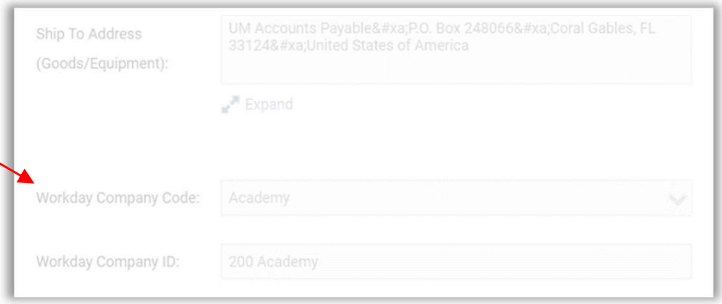
Use the **Additional Relevant Information** field to capture any additional information about the contract you are requesting that was not captured above.



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



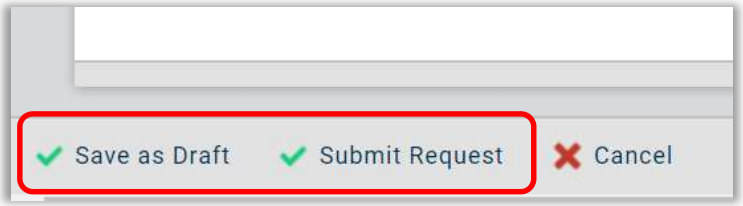
Workday Company Code field determines the routing of the request – either to Purchasing (Academic and Research) or UHealth Supply Chain Services.



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.

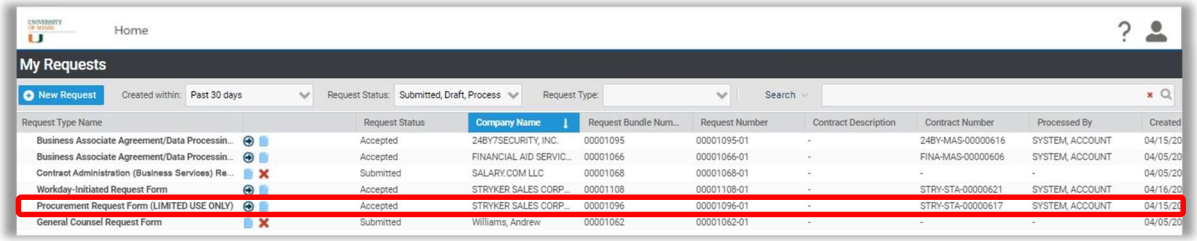
49. When you are ready to submit the request form, click **Submit Request** at the bottom of the screen. If you are not ready to submit the request form, click **Save as Draft**. The request form is saved to My Requests and you may re-open, edit and submit the request at a later time.



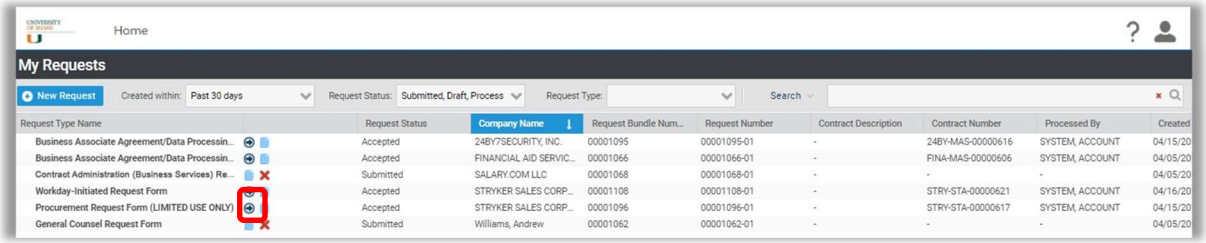
TIP: If you forget to add an attachment you can always upload it later as document under the Links > Documents Section.

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*.



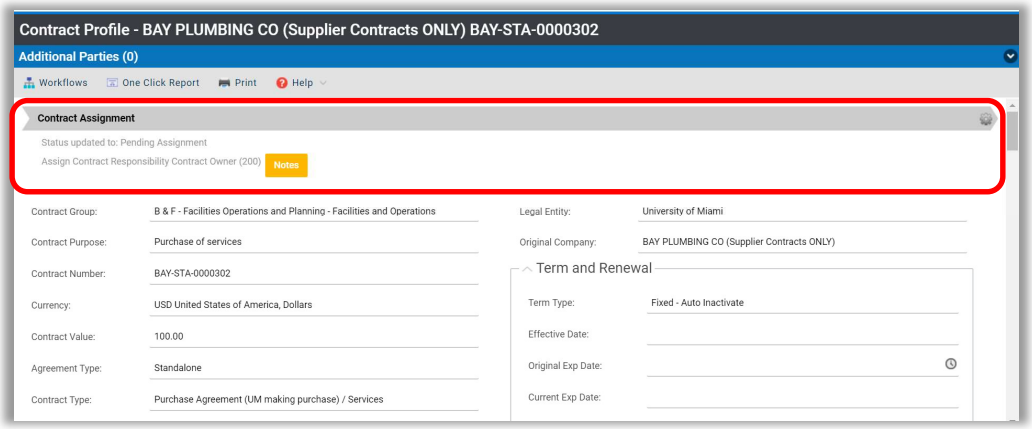
TIP: You may need to refresh the My Requests screen in order to refresh the Request Status of the Procurement Request from Submitted to Accepted. Click the **Go to Contract** icon ( ) on the relevant Request in your My Requests screen to go to the Contract Profile (i.e., contract record).



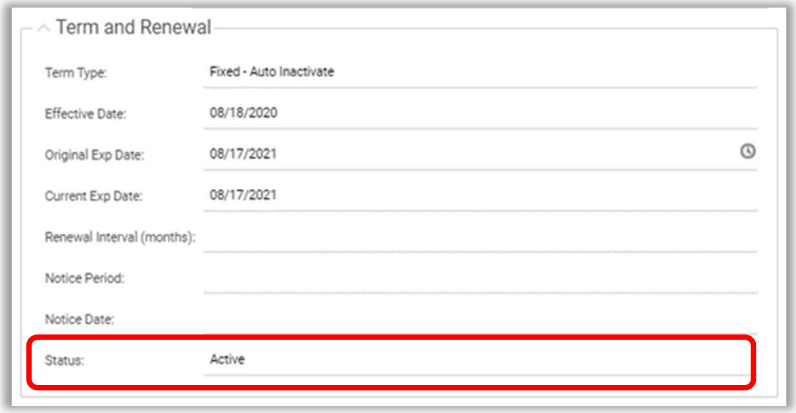
51. Once your request is processed by the system, you also receive an **email notification** from Conga indicating that your request has been received by Account System.

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.

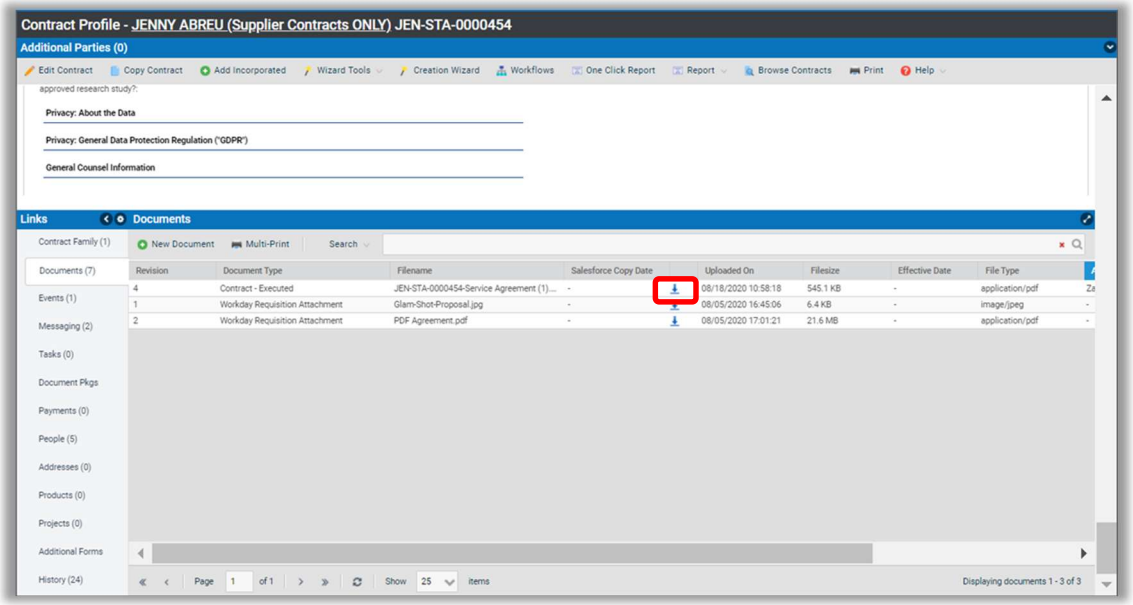


53. In the Term and Renewal section of the Contract Profile, you can view the **Status** of the contract.



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.

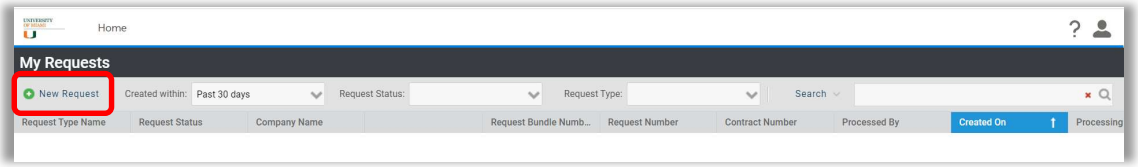
Additional Key Information

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 Order**s
    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. E**mergency 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.

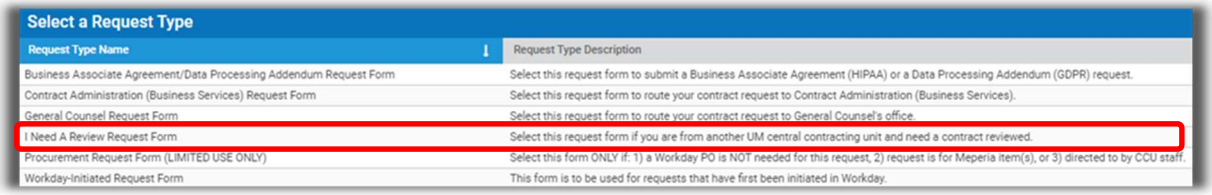
Submitting an I need a Review Request

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).

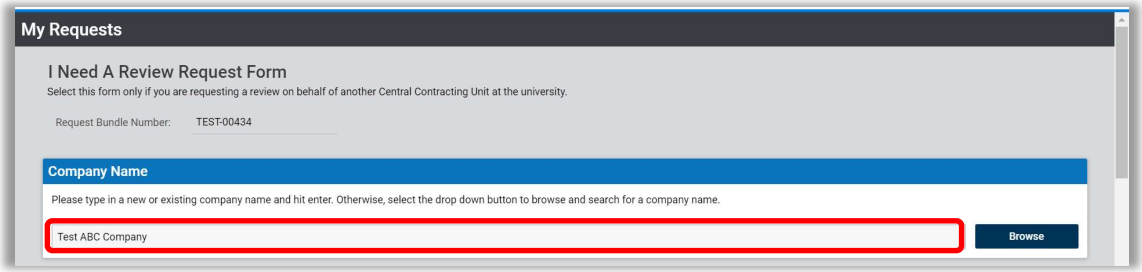
1. Log into Conga Contracts.
2. On your My Requests dashboard, click **New Request** to open the list of Request Types.



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.

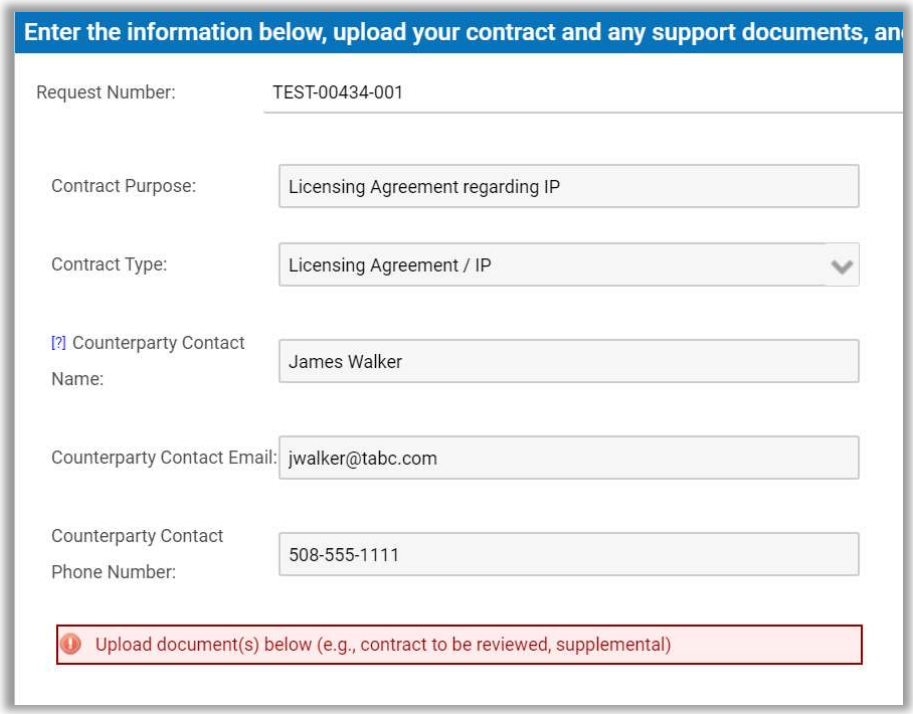


TIP: You may also use the Browse button to open the full Company listing and search for the Counterparty.

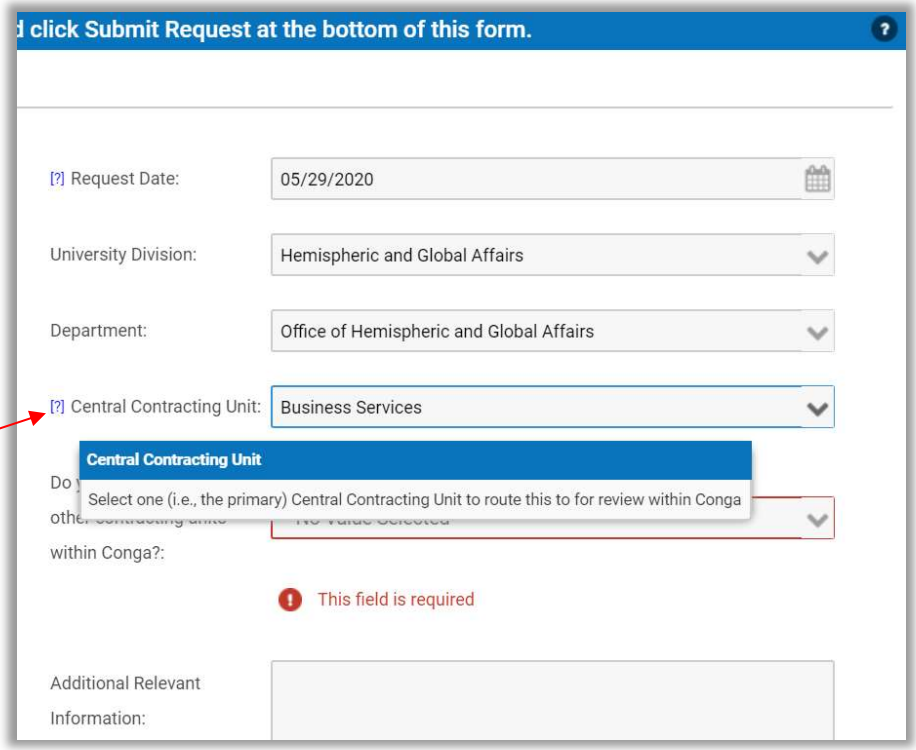
5. **Complete all required fields in the request form**. The form is divided into sections. The main section contains common fields that are always visible and/or required. Data fields in sections that contain a "header" (e.g., Revenue Payment Information) only appear when the fields are relevant to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

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

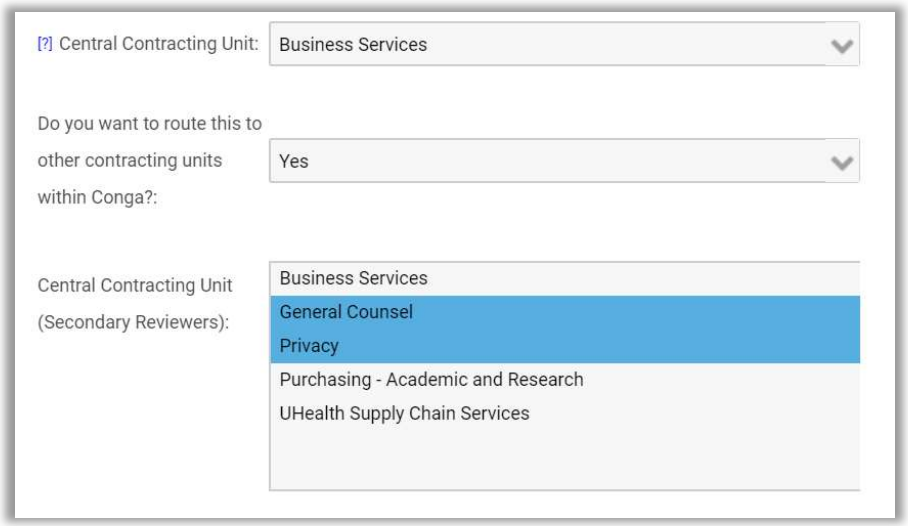
TIP: If you tab from field to field in the request form, you will be taken first through all of Column 1 and then through Column 2.



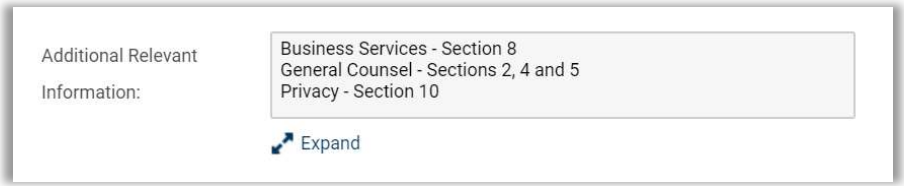
Mouse over **[?]** to reveal **Quick Tips** regarding the data field.



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

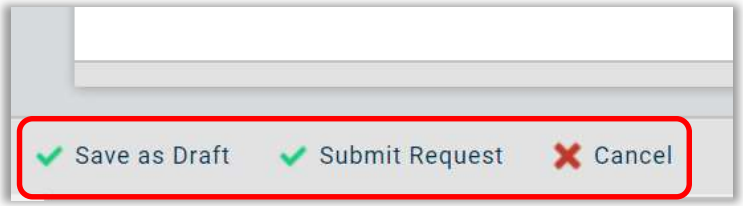


Use the Additional Relevant Information field to describe/explain the contract/deal and/or what specifically needs to be reviewed.



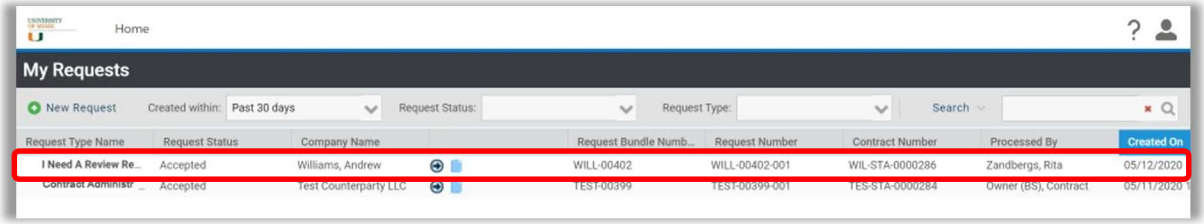
6. In the **Documents** section, upload the contract that you need review, as well as any other supplemental documentation. Click **Select File** to find and select the document on your computer and attach it to the request. Repeat, as needed.

7. 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**.



8. 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).

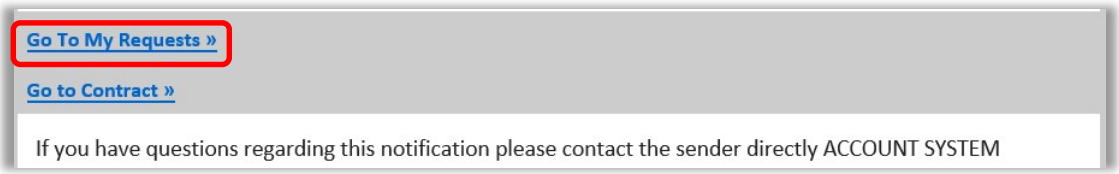


TIP: You may need to refresh the My Requests screen in order to refresh the Request Status of the Procurement Request from Submitted to Accepted.

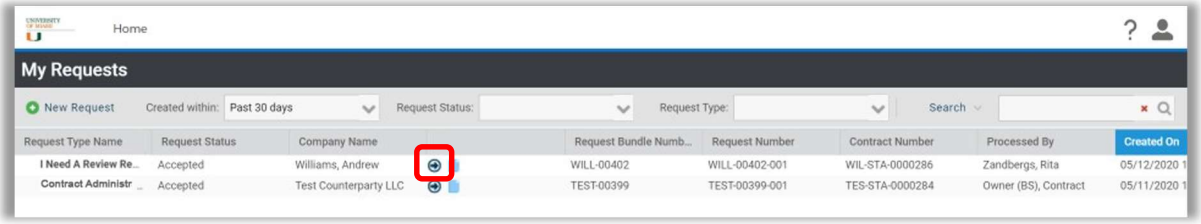
9. Once your request has been processed by the system, you will receive an **email notification** from Conga indicating that your request has been received by Account System.

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.

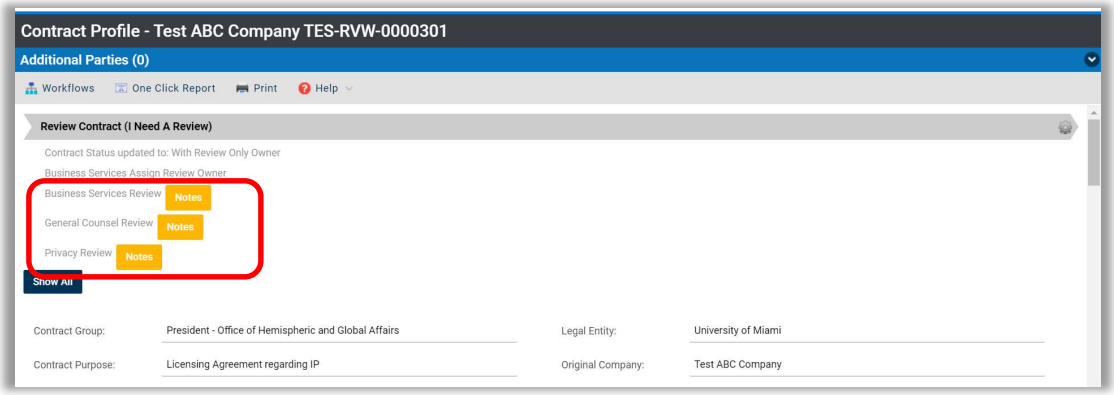
10. Click on the **Go To My Requests** button at the bottom of the email notification to log back into Conga.



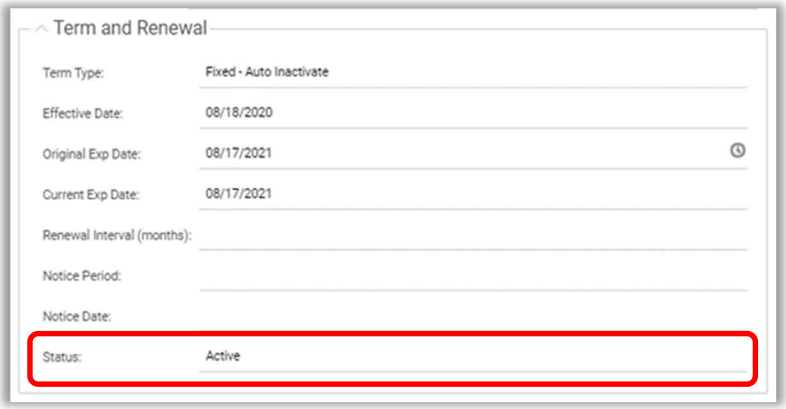
11. Click the **Go to Contract** icon ( ) on the relevant Request to go to the Contract Profile (i.e., contract record).



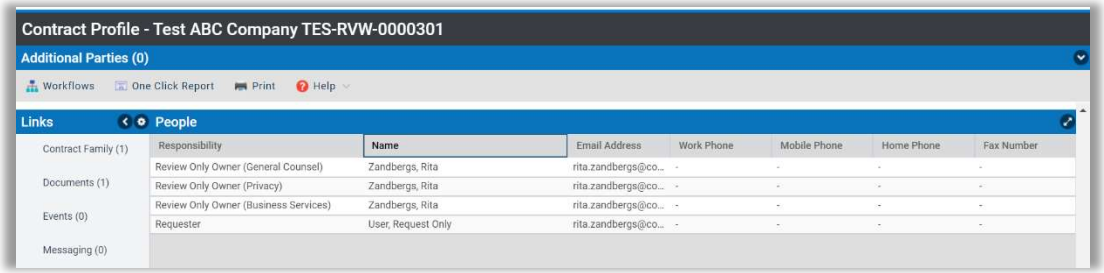
12. In the Contract Profile you can view the contract as it moves through all the **Stages** of the review process.



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



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.



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.

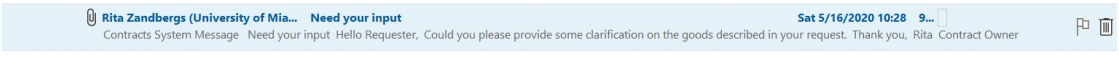
Messaging

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.

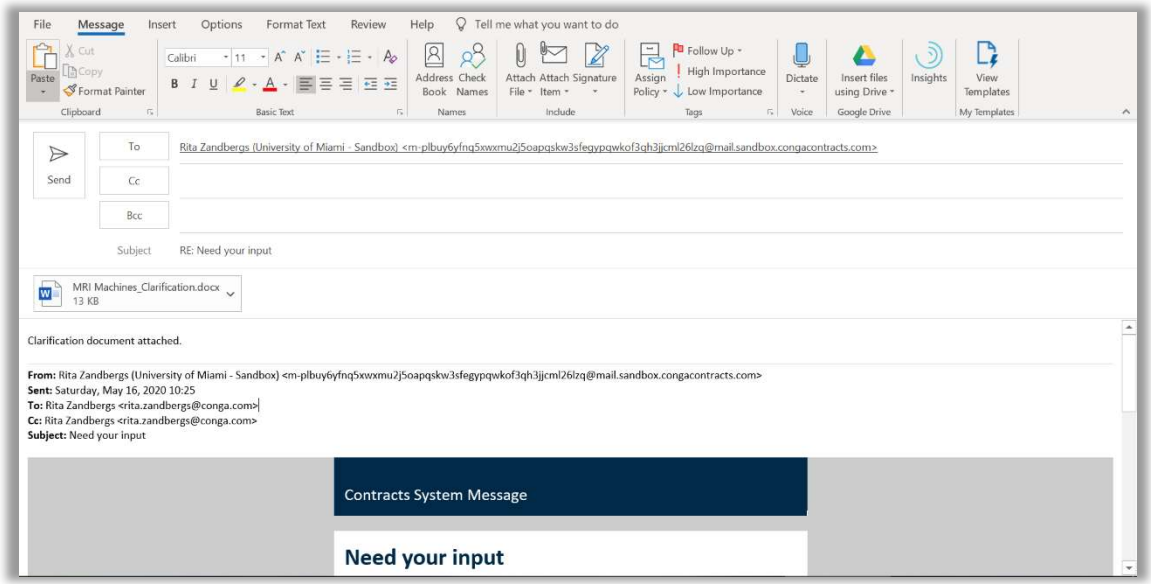
During the contracting process, you may receive a Messaging message from a Conga Contract Owner. Messaging messages, although sent through Conga, come from the User who sends it. If you receive a Messaging message, reply to it to ensure that your reply is captured back in Conga. If you attach documents 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

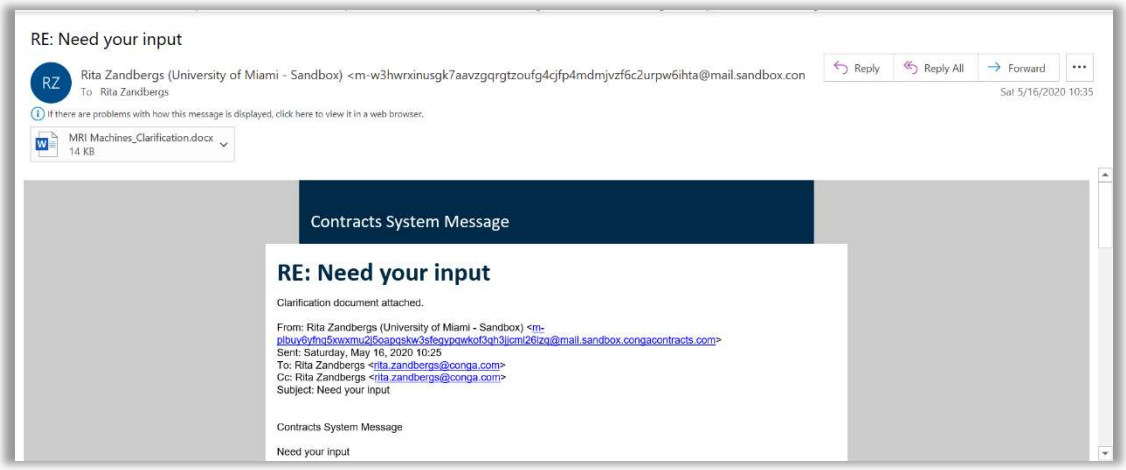
1. You will recognize a Messaging message from Conga based on the Sender. The Sender is the user; the user's name is followed by "(University of Miami)".



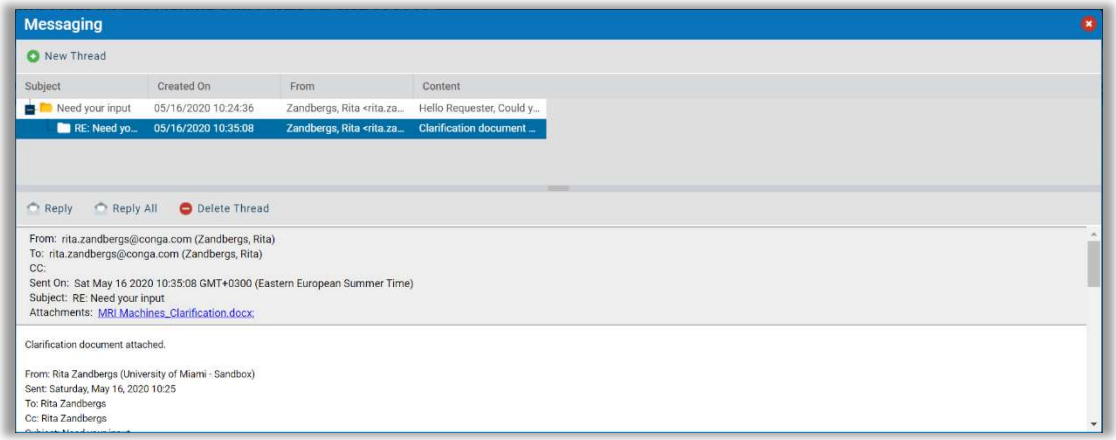
2. Open the email and hit **Reply All**.
3. Write your reply, attach a document (optional), and click **Send**.



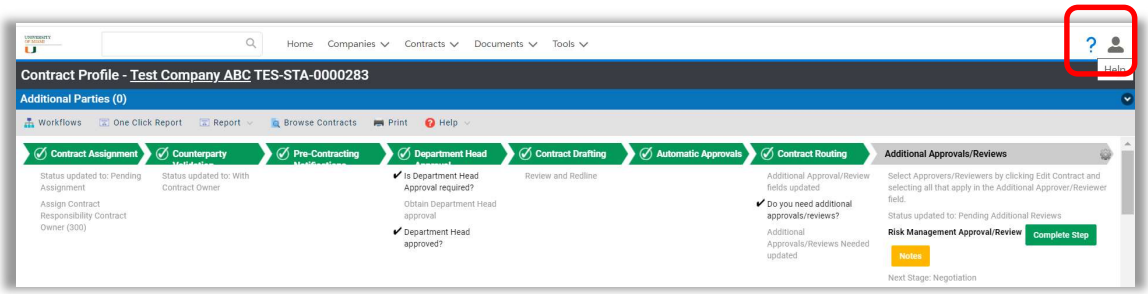
4. When you reply to a Messaging message:
    a. It is **sent to the Recipient's email**.



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.