



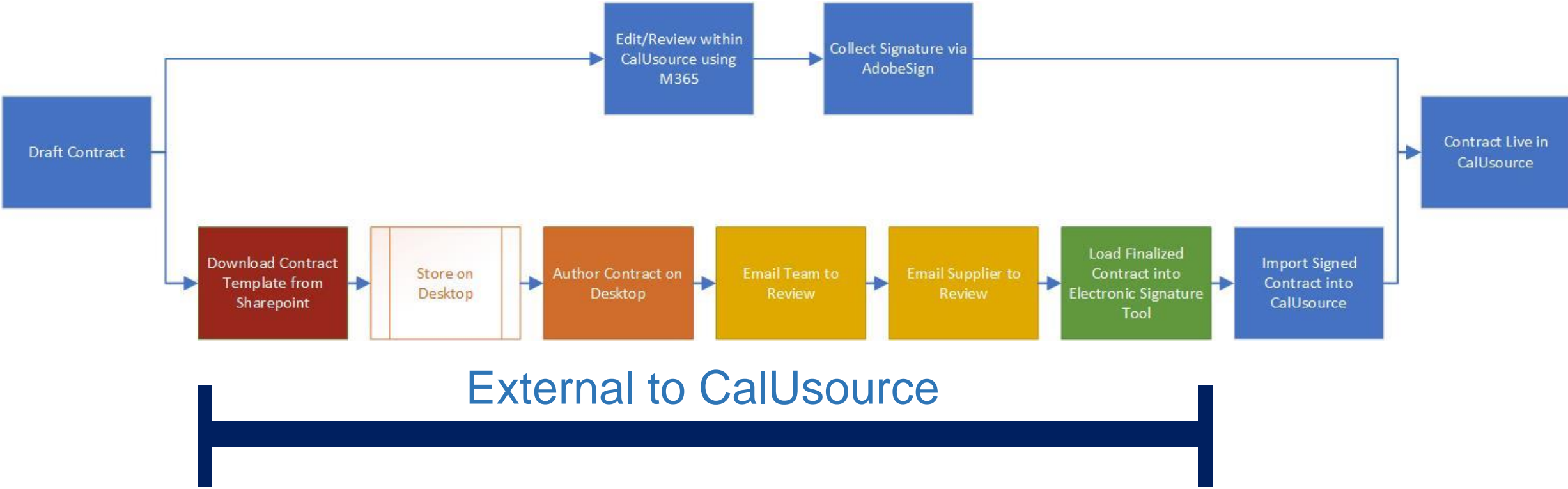
# Full Contract Lifecycle Management

November 2022

# Today's Objective

- Understand the enhancements to the CLM functionality
- Learn how to use Microsoft 365/Word to author and review contracts
- Learn how to use AdobeSign to execute contracts

# Current Process vs. CLM within CalUsource



# Overview

## Contract Authoring (MS Word)



Office 365



**CALUSOURCE**  
Collaborative Procurement

Authors and reviewers edit language using MS Word

MS Word can be used at any part of the authoring/review process

Available to any campus user who has a license

# Overview

## Contract Execution (AdobeSign)



Adobe Sign



**CALUSOURCE**  
Collaborative Procurement

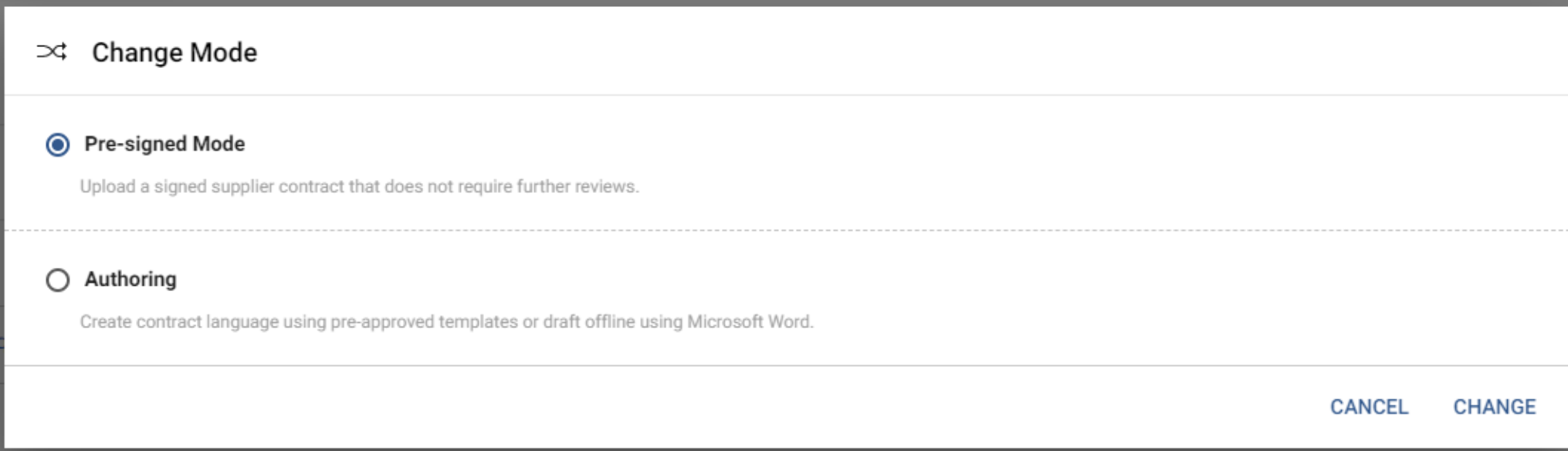
Signature collection is started within CalUsource

Collection is managed by AdobeSign

Finished contract document is imported into CalUsource

Costs are managed centrally - AdobeSign is free for all users

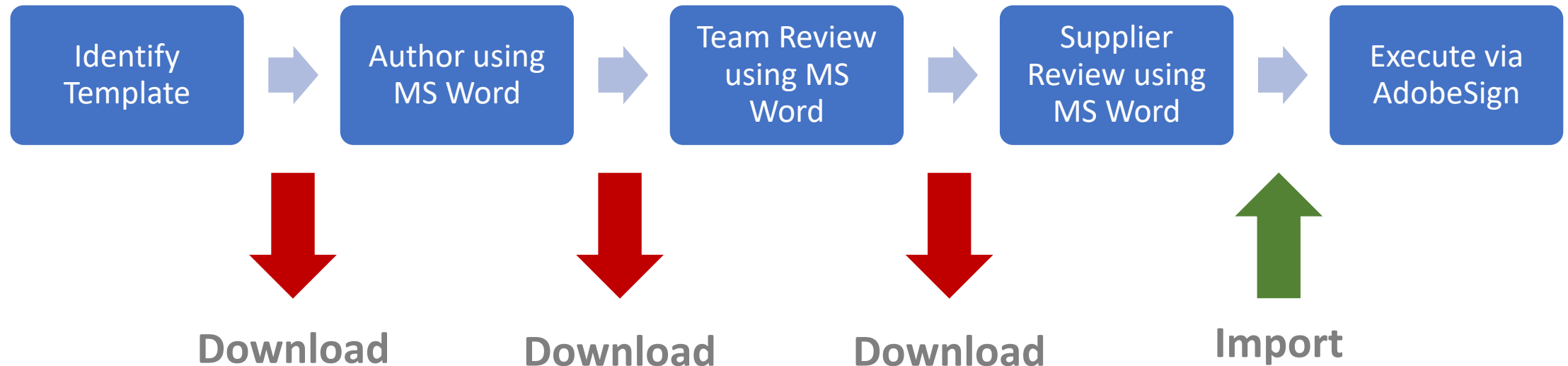
# Pre-signed vs. Authoring Mode



The screenshot shows a 'Change Mode' dialog box with two radio button options. The 'Pre-signed Mode' option is selected, indicated by a filled blue circle. Below it is the text 'Upload a signed supplier contract that does not require further reviews.' The 'Authoring' option is unselected, indicated by an empty circle, with the text 'Create contract language using pre-approved templates or draft offline using Microsoft Word.' at the bottom right of the dialog are two buttons: 'CANCEL' and 'CHANGE'.

- **Pre-signed Mode – Current Default**
  - Allows end users to import pre-signed contract documentation
- **Authoring**
  - Allows end users to edit contract and send contracts for signature

# CLM Process within CalUsource



# Contract Authoring & Execution

The screenshot displays the CALUSOURCE web application interface. At the top, the navigation bar includes 'Sourcing', 'Contract', 'Supplier', 'Analytics', and 'Spend Utilities'. A search bar and user profile 'IW' are also present. The main content area shows a contract draft titled 'Adobe Sign Test 81622 1' in a 'Draft' status. The left sidebar contains navigation options: Home, My Tasks (with 11 items), Create, Help Us Improve, and a list of contract sections: CONTRACT SUMMARY, BASIC DETAILS, APPLICABLE FOR, INTERNAL PARTY, EXTERNAL PARTY, TERMS, and NOTES AND ATTACHME... The main panel has tabs for 'CONTRACT DETAILS', 'ADDITIONAL INFORMATION', and 'CONTRACT LANGUAGE'. A large 'Site Demonstration' watermark is overlaid on the center. The 'BASIC DETAILS' section is expanded, showing fields for 'Contract Name\*' (adobe sign test 81622 1), 'Contract Number\*' (2022002597), a 'Mark as Confidential' checkbox, 'Document Type\*' (Agreement), 'Contract Type\*' (Purchase Agreement), and 'Contract Administrator' (Ivy Weirather). A 'Description\*' field contains 'adobe sign test 81622 1'. There are also buttons for 'COMMENTS', 'Copy URL', and 'Export'.



# Available Resources

## Today's webinar: Recording & slide deck

### CONTRACT WEBINARS

As “show and tell” instruction, our webinars coach you into greater proficiency and confidence using CalUsource. Brief in length (20-30 minutes), they focus on one or two critical processes or actions within the Contract module. These webinars include a slide deck PDF so you can follow the process at your own speed.

All links open in a new window.

DATE	RECORDED WEBINAR	SLIDE DECK
01.27.20	<a href="#">Reporting on Contracts with Insights</a>	PDF
10.28.19	<a href="#">Best Practices for Loading Contracts into CalUsource</a>	PDF
6.17.19	<a href="#">CalUsource Contracts Upgrades</a>	
1.28.19	<a href="#">Contracts Lifecycle Management</a>	PDF
7.2.18	<a href="#">Using Electronic Signatures</a>	PDF
6.4.18	<a href="#">Uploading Campus-Specific Templates into CalUsource</a>	PDF
5.16.18	<a href="#">Contract Search Training for OGC</a>	PDF
3.1.18	<a href="#">Uploading and Amending Contracts in CalUsource</a>	PDF

# Available Resources

## **New!** Quick Reference Guides (QRG's)

Creating a Draft Contract	<a href="#">Creating a Draft Contract</a>	7/8/20
	<a href="#">Contract Confidentiality</a>	08/30/21
	<a href="#">Adding New Supplier Contacts</a>	4/06/21
	<a href="#">Using a Contract Language Smart Template</a>	9/29/22
	<a href="#">Adding Notes and Attachments</a>	3/16/21
	<a href="#">Creating a Supplier before Loading a Presigned Agreement</a>	7/22/20
	<a href="#">Loading a Presigned Agreement in CalUsource</a>	10/27/20
	<a href="#">Amending a Contract</a>	9/29/22
Contract Review	<a href="#">Deleting a Draft Contract</a>	4/06/21
	<a href="#">Authoring a Contract</a>	9/29/22
	<a href="#">Routing for Supplier and Team Review</a>	4/6/21
	<a href="#">Routing for Signature using AdobeSign</a>	9/29/22
	<a href="#">Obtaining Wet Signatures (PDF)</a>	