

ESM Online Contract Platform Frequently Asked Questions

1. Q: Do I need to upload a copy of the green folder cover?

A: No. The online platform has a screen, Contract Details, where the user can fill out all of the pertinent information relating to the agreement. All required information is noted.

2. Q: What Contract Type do I use?

A: Contract Type will depend on the kind of contract you are uploading for review. The types are:

Academic Standard Agreement – This is used for standard agreements (agreements already pre-approved by General Counsel) for academic departments (Arts & Sciences, Communications & the Arts, Diplomacy, School of Business, Education, Law School). *Note:* Health and Medical Sciences and the College of Nursing have their own contract types that are to be used only by these departments respectively.

- **Facilities Standard Agreement** – This is to be used by the Department of Facilities and Engineering only.
- **Non-Standard Agreement** – This is used for any agreement being uploaded that does not originate from inside the University. If it comes from a vendor/external party, it needs to be reviewed as a Non-Standard, regardless of department.
- **Standard Non-Academic Agreement** - This is used for standard agreements (agreements already pre-approved by General Counsel) for non-academic departments (Administration, Advancement, Athletics, Enrollment Services, Finance, Human Resources, Information Technology, Student Services).

3. Q: The standard agreement has already been signed by the vendor, do I still go through the uploading process?

A: Yes. Complete the Contract Details screen, upload the agreement that has been signed, and submit. Once approved, it will be forwarded to the appropriate Seton Hall signor for digital signature.

4. Q: Can I create a standard agreement within the system?

A: Yes. The Documents tab has templates of several University standard agreements. Download the agreement you need from the list, input the information for the specific agreement, and save. This agreement can then be sent from the platform to the vendor for initial digital signature and then to the Seton Hall signor for digital signature.

5. Q: Will General Counsel use ESM for non-standard agreements?

A: Yes. General Counsel will be notified of a non-standard agreement that needs their review. However, General Counsel will perform all edits, revisions, and communications outside of the platform. A final reviewed and approved

agreement will be uploaded and forwarded to the appropriate Seton Hall signor for digital signature.

6. Q: Will I be able to track the review process in ESM?

A: Yes. On the Approvals tab of an agreement, users are able to view the number of approvals that the agreement has gone through. If there are further questions, users can contact Business Affairs.

7. Q: Will I be notified that there is a contract for me to approve?

A: Yes. When contracts are submitted by the initiator, the routing process will begin and an email will be sent to the appropriate party that needs to approve. Approvers, also have the ability to add notes to their approval screen that other Approvers will be able to see.

8. Q: Are changes able to be made once the contract has been submitted for approval?

A: Yes. The initiator can upload documents to the contract file after it has been submitted. However, changes to the 'Contract Details' tab will need to be made by Business Affairs. Users can contact Business Affairs with changes that need to be made.

9. Q: Will I be notified when the contract is complete?

A: Yes. Once the final approval is complete, an email notification will be sent. Standard agreements that require the Provost's signature will be uploaded to the 'Documents' tab in the contract file. Non-Standard agreements that require VP of Finance signature will be emailed back to the initiator and uploaded to ESM in the 'Documents' tab. Please upload fully executed agreements.

10. Q: Can I upload old contracts that were already signed?

A: Yes. You can upload older agreements for record keeping purposes. In this case, you would change the status of the contract to "signed" since it was already approved outside of the system.

11. Q: Can more than one person be inside of the contract file at one time?

A: Yes, however no changes can be made after the first person has opened the file to make changes. Changes can be made by one user at a time.

12. Q: Does the ESM Contract system automatically create a Purchase Order?

A: No. Once the contract is fully executed, a Purchase Order Request must be submitted to Accounts Payable at accountspayable@shu.edu.

13. Q: Are there additional approvals necessary for agreements that have high monetary values?

A: Yes. Agreements that have a total value of over \$250,000 will need to be approved by the President of the University. ESM will automatically include an approval step that will notify the President's Office to review. Users will also be

asked to include a memo stating the purpose of the agreement and the account from which the funds will come.

14.Q: Who do I contact if I need assistance with ESM?

A: Please contact Peter Trunk or Jaquonda Hutchins of the Business Affairs office for assistance with ESM.

15.Q: Who do I contact if someone in my department needs access to ESM?

A: Please contact Peter Trunk or Jaquonda Hutchins of the Business Affairs office for adding access to ESM to people in your department.