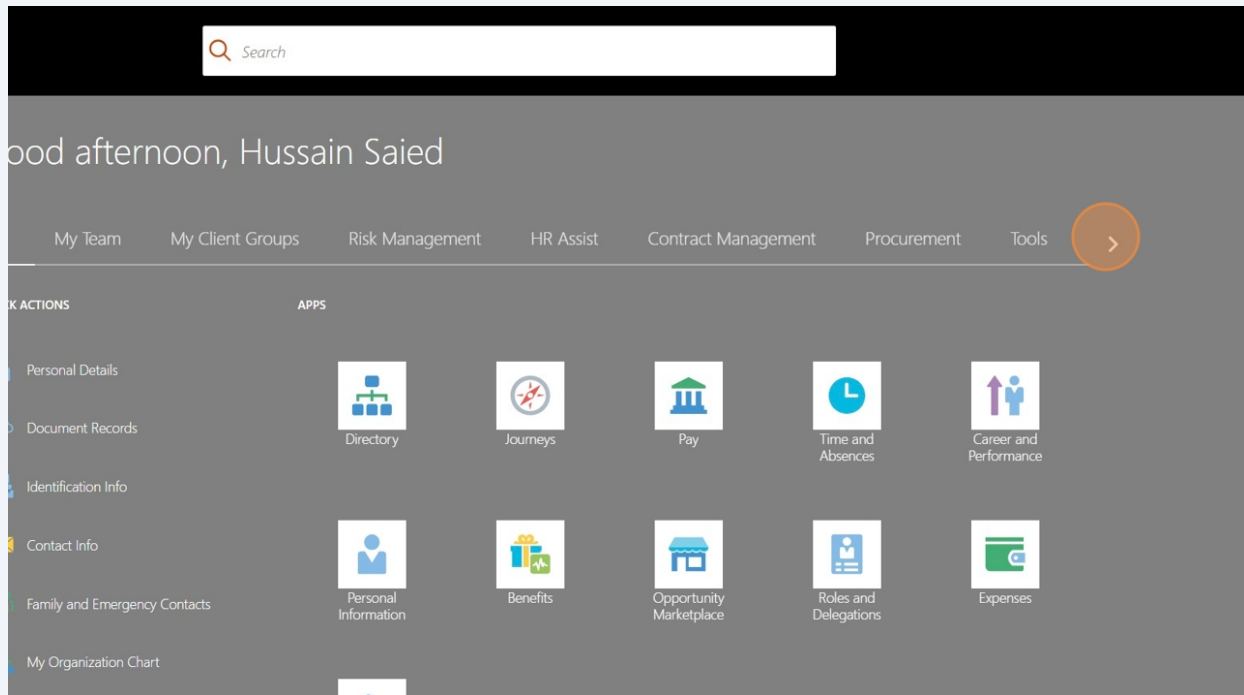
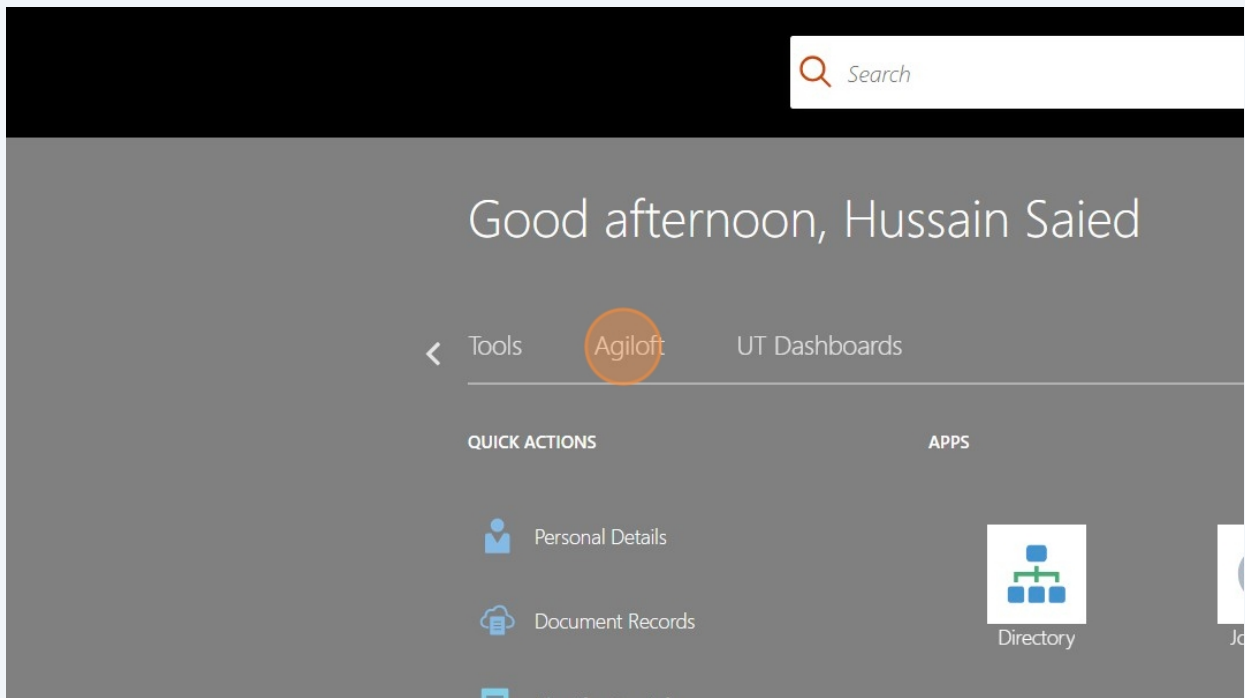


Creating a Contract

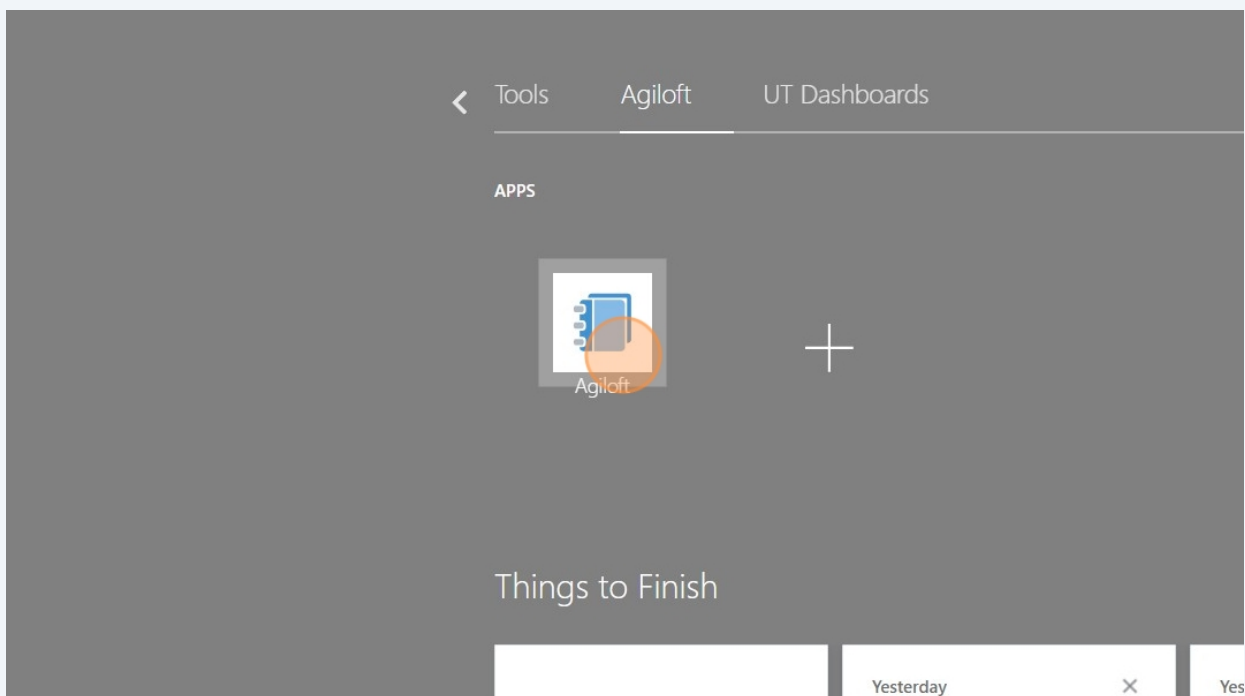
- 1 Log into Dash and use the arrow on the slider to find "Agiloft"



2 Click "Agiloft"



3 Click this icon.



4 Click "Submit a Contract"



The University of Tennessee Contract Management Portal



My Profile

Manage your user profile



Submit a Contract

Submit a new contract

Search

Contracts Goog



My Contracts

View your previously submitted contracts



All Contracts

View all contracts



My Approvals

All contracts pending your approval



All Approvals

View all approvals

5 Start typing the company name or click on the magnifying glass to do a search.

6

Submit a Contract

Save **Cancel** **Contract**

Save as Draft

*Company Name:

*Contract Title:

ACME AUTO LEASING LLC

ACME Block and Brick INC.

ACME INDUSTRIAL PIPING

Contract Info | Document | Approvals | DocuSign Envelopes << >>

[Collapse All](#)

*Record Type:

Amendment Information

*Is the Contract Project Related?: Yes No

GL Account Information

Account Number: Account Description:

7

Enter the title of your contract.

Submit a Contract

Save **Cancel** **Contract**

Save as Draft

*Company Name: [ACME Block and Brick INC.](#)

*Contract Title:

Contract Info | Document | Approvals | DocuSign Envelopes << >>

[Collapse All](#)

*Record Type:

Amendment Information

*Is the Contract Project Related?: Yes No

GL Account Information

Account Number: Account Description:



Tip! Make sure your contract title is descriptive

8

Is the contract project related or not? In this scenario, my contract is not project related so I will select "no"

Save as Draft

*Company Name: [ACME Block and Brick INC.](#)

*Contract Title: Hotel Reservations for Board of Trustees Meeting

Contract Info | Document | Approvals | DocuSign Envelopes << >>

[Collapse All](#)

*Record Type: New Contract

▼ [Amendment Information](#)

*Is the Contract Project Related?: Yes No

▼ [GL Account Information](#)

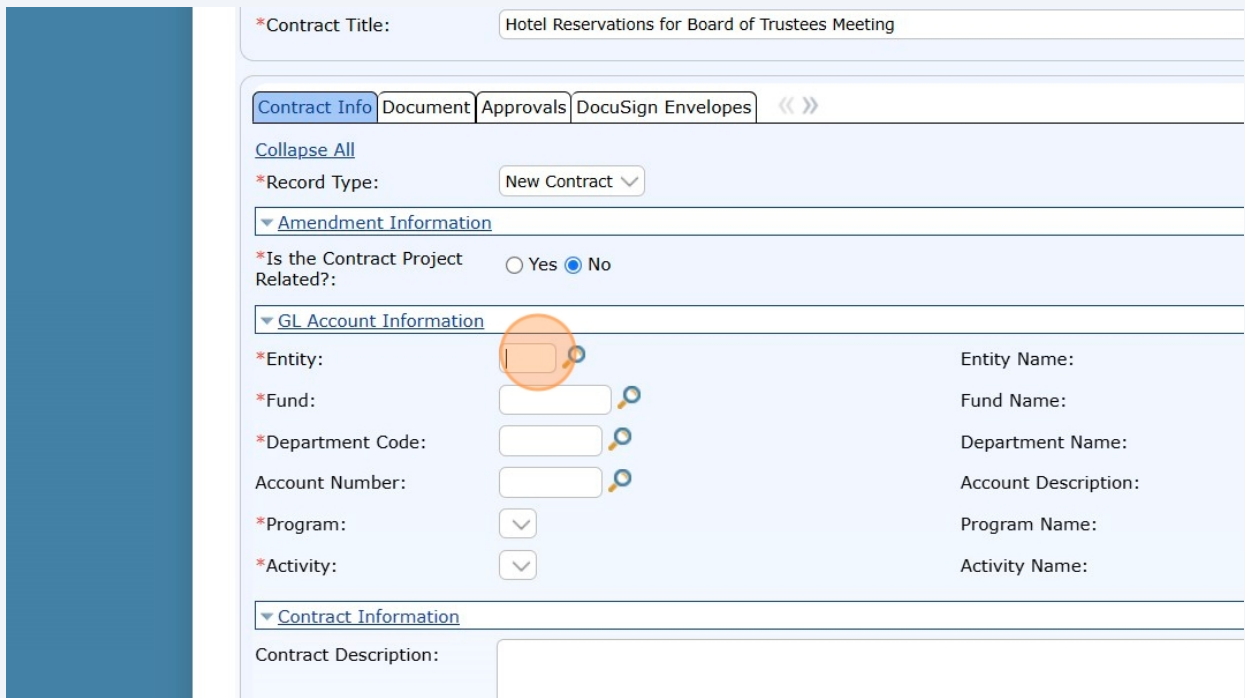
Account Number: Account Description:

▼ [Contract Information](#)

Contract Description:

9

You will begin entering your GL account string starting with entity



*Contract Title:

[Contract Info](#) [Document](#) [Approvals](#) [DocuSign Envelopes](#) << >>

[Collapse All](#)

*Record Type:

▼ [Amendment Information](#)

*Is the Contract Project Related?: Yes No

▼ [GL Account Information](#)

*Entity:	<input type="text" value=""/>	Entity Name:
*Fund:	<input type="text" value=""/>	Fund Name:
*Department Code:	<input type="text" value=""/>	Department Name:
Account Number:	<input type="text" value=""/>	Account Description:
*Program:	<input type="text" value=""/>	Program Name:
*Activity:	<input type="text" value=""/>	Activity Name:

▼ [Contract Information](#)

Contract Description:

Detailed description: The image shows a web-based form for entering contract information. The 'Contract Title' field contains 'Hotel Reservations for Board of Trustees Meeting'. Below this are tabs for 'Contract Info', 'Document', 'Approvals', and 'DocuSign Envelopes'. The 'Record Type' is set to 'New Contract'. Under 'Amendment Information', the 'Is the Contract Project Related?' checkbox is checked for 'No'. The 'GL Account Information' section is expanded, showing fields for Entity, Fund, Department Code, Account Number, Program, and Activity. Each of these fields has a magnifying glass icon to its right, indicating a search function. The 'Entity' field is highlighted with an orange circle and a magnifying glass icon, which is also highlighted with a larger orange circle. To the right of these fields are labels for 'Entity Name', 'Fund Name', 'Department Name', 'Account Description', 'Program Name', and 'Activity Name'. At the bottom, there is a 'Contract Information' section with a 'Contract Description' field.

10

You can type your entity number or click on the magnifying glass to search the list of entities.

11

Contract Info | Document | Approvals | DocuSign Envelopes << >>

[Collapse All](#)

*Record Type:

Amendment Information

*Is the Contract Project Related?: Yes No

GL Account Information

*Entity:	<input type="text" value="01"/>	Entity Name:
*Fund:	<input type="text" value="01"/>	Fund Name:
*Department Code:	<input type="text"/>	Department Name:
Account Number:	<input type="text"/>	Account Description:
*Program:	<input type="text"/>	Program Name:
*Activity:	<input type="text"/>	Activity Name:

Contract Information

Contract Description:

12 Enter the fund

Contract Info | Document | Approvals | DocuSign Envelopes << >>

[Collapse All](#)

*Record Type:

Amendment Information

*Is the Contract Project Related?: Yes No

GL Account Information

*Entity:	<input type="text" value="01"/>	Entity Name: UT
*Fund:	<input type="text" value="1100001"/>	Fund Name:
*Department Code:	<input type="text" value="1100001"/>	Department Name:
Account Number:	<input type="text"/>	Account Description:
*Program:	<input type="text"/>	Program Name:
*Activity:	<input type="text"/>	Activity Name:

Contract Information

Contract Description:

13 Enter the department

[Collapse All](#)

*Record Type:

▼ [Amendment Information](#)

*Is the Contract Project Related?: Yes No

▼ [GL Account Information](#)

*Entity:	<input type="text" value="01"/>	Entity Name:	UT
*Fund:	<input type="text" value="1100001"/>	Fund Name:	Ed
*Department Code:	<input type="text" value="011415"/>	Department Name:	
Account Number:	<input type="text" value="011415"/>	Account Description:	
*Program:	<input type="text"/>	Program Name:	
*Activity:	<input type="text"/>	Activity Name:	

▼ [Contract Information](#)

Contract Description:



Tip! The account is what we formerly referred to as a the GL number

14 Enter the account.

*Record Type:

[Amendment Information](#)

*Is the Contract Project Related?: Yes No

[GL Account Information](#)

*Entity:	<input type="text" value="01"/>	Entity Name:	UT
*Fund:	<input type="text" value="1100001"/>	Fund Name:	Ed
*Department Code:	<input type="text" value="011415"/>	Department Name:	Un
Account Number:	<input type="text" value="539100"/>	Account Description:	
*Program:	<input type="text" value="539100"/>	Program Name:	
*Activity:	<input type="text"/>	Activity Name:	

[Contract Information](#)

Contract Description:

*Contract Category:

Contract Type:

15 Or to search by text, click on the magnifying glass

[Collapse All](#)

*Record Type:

[Amendment Information](#)

*Is the Contract Project Related?: Yes No

[GL Account Information](#)

*Entity:	<input type="text" value="01"/>	Entity Name:	UT
*Fund:	<input type="text" value="1100001"/>	Fund Name:	Ed
*Department Code:	<input type="text" value="011415"/>	Department Name:	Un
Account Number:	<input type="text"/>	Account Description:	
*Program:	<input type="text"/>	Program Name:	
*Activity:	<input type="text"/>	Activity Name:	

[Contract Information](#)

Contract Description:

16 Click the "All text fields" field.

THE UNIVERSITY of TENNESSEE

Look Up Account

Search... [Show All](#) [Advanced Search](#)

▼ Search Options

- Account Code String
- All text fields Context
- All linked fields

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page

Edit	ID ↓	Account Code	Account Type	Account Description	Start Date	End Date
		6ZZZZZ	Expense	TTL Transfers	01/01/2021	
		670450	Expense	Transfers To Advancement Assessment	01/01/2021	
		670400	Expense	Transfers From Gift Account	01/01/2021	
		670350	Expense	Transfers To Permanently Restricted	01/01/2021	
		670300	Expense	Transfers From Permanently Restricted	01/01/2021	

17 In the search field, type in your text

Look Up Account

Search... [Show All](#) [Advanced Search](#)

▼ Search Options

- Account Code String
- All text fields Context
- All linked fields

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page

Edit	ID ↓	Account Code	Account Type	Account Description	Start Date	End Date
		6ZZZZZ	Expense	TTL Transfers	01/01/2021	
		670450	Expense	Transfers To Advancement Assessment	01/01/2021	
		670400	Expense	Transfers From Gift Account	01/01/2021	
		670350	Expense	Transfers To Permanently Restricted	01/01/2021	
		670300	Expense	Transfers From Permanently Restricted	01/01/2021	
		670250	Expense	Transfers To Temporarily Restricted	01/01/2021	
		670200	Expense	Transfers From Temporarily Restricted	01/01/2021	

18 Click "go"

Look Up Account

furniture Go [Show All](#) [Advanced Search](#)

Search Options

Account Code String
 All text fields Context
 All linked fields

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page Go

Edit	ID ↓	Account Code	Account Type	Account Description	Start Date	End Date
		6ZZZZZ	Expense	TTL Transfers	01/01/2021	
		670450	Expense	Transfers To Advancement Assessment	01/01/2021	
		670400	Expense	Transfers From Gift Account	01/01/2021	
		670350	Expense	Transfers To Permanently Restricted	01/01/2021	
		670300	Expense	Transfers From Permanently Restricted	01/01/2021	
		670250	Expense	Transfers To Temporarily Restricted	01/01/2021	
		670200	Expense	Transfers From Temporarily Restricted	01/01/2021	

19 Choose the account from the list of selections

furniture Go [Show All](#) [Advanced Search](#)

Search Options

Account Code String
 All text fields Context
 All linked fields

Status: 3 record(s) found, 1 page(s) [Click for details...](#)

Edit	ID ↓	Account Code	Account Type	Account Description	Start Date	End Date
		561100	Expense	Furniture and Office Equipment	01/01/2021	
		121319	Asset	Furniture Office Machines Works Of Art	01/01/2021	
		121310	Asset	Furniture Office Machines Works Of Art	01/01/2021	

20 Enter the program from the dropdown menu

*Record type:

▼ Amendment Information

*Is the Contract Project Related?: Yes No

▼ GL Account Information

*Entity:	<input type="text" value="01"/>	Entity Name:	UT
*Fund:	<input type="text" value="1100001"/>	Fund Name:	Ed
*Department Code:	<input type="text" value="011415"/>	Department Name:	Un
Account Number:	<input type="text" value="539100"/>	Account Description:	Op
*Program:	<input type="text" value="260"/>	Program Name:	
*Activity:	<input type="text"/>	Activity Name:	

▼ Contract Information

Contract Description:

*Contract Category: Contract Type:

21 Enter the activity from the dropdown menu

▼ Amendment Information

*Is the Contract Project Related?: Yes No

▼ GL Account Information

*Entity:	<input type="text" value="01"/>	Entity Name:	UT
*Fund:	<input type="text" value="1100001"/>	Fund Name:	Ed
*Department Code:	<input type="text" value="011415"/>	Department Name:	Un
Account Number:	<input type="text" value="539100"/>	Account Description:	Op
*Program:	<input type="text" value="260"/>	Program Name:	Ins
*Activity:	<input type="text"/>	Activity Name:	<input type="text"/>

▼ Contract Information

Contract Description:

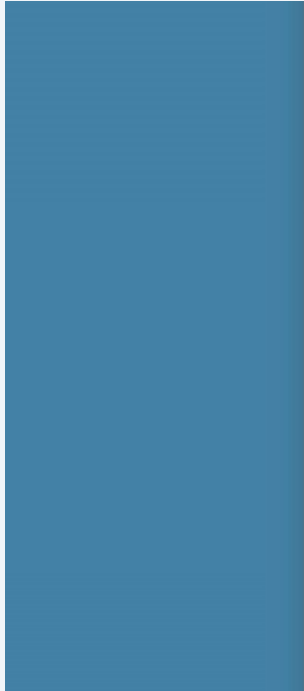
*Contract Category: Contract Type:

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Alert! The following instructions are for entering project information in the account section.

22 If your contract is project related, select "yes"



*Company Name: [ACME Block and Brick INC.](#)

*Contract Title:

Contract Requester: [Test Portal](#)

[Contract Info](#) | [Document](#) | [Approvals](#) | [DocuSign Envelopes](#) | [«](#) | [»](#)

[Collapse All](#)

*Record Type:

▼ [Amendment Information](#)

*Is the Contract Project Related?: Yes No

▼ [GL Account Information](#)

Account Number: [🔍](#) Account Description

▼ [Project Information](#)

*Project Number: [🔍](#) Project Name:

*Task Number: [🔍](#) Task Name:

*Award Number: [🔍](#) Award Name:

Funding Source Number: [🔍](#) *Funding Source Name:

*Expenditure Type: [🔍](#)

23 Click this text field.

*Contract Title:

[Contract Info](#) [Document](#) [Approvals](#) [DocuSign Envelopes](#) << >>

[Collapse All](#)

*Record Type: ▾

▼ [Amendment Information](#)

*Is the Contract Project Related?: Yes No

▼ [Project Information](#)

*Project Number:	<input type="text"/>	Project Name:
*Task Number:	<input type="text"/>	Task Name:
*Award Number:	<input type="text"/>	Award Name:
Funding Source Number:		*Funding Source Name: <input type="text" value=""/>
*Expenditure Type:	<input type="text"/>	
*Budget Entity:	<input type="text"/>	Budget Entity Name

▼ [Contract Information](#)

Contract Description:

24 Type in your project number and select the project from the dropdown

[Contract Info](#) [Document](#) [Approvals](#) [DocuSign Envelopes](#) << >>

[Collapse All](#)

*Record Type: ▾

▼ [Amendment Information](#)

*Is the Contract Project Related?: Yes No

▼ [Project Information](#)

*Project Number:	<input type="text" value="spn108673"/>	Project Name:
*Task Number:	<input type="text"/>	Task Name:
*Award Number:	<input type="text"/>	Award Name:
Funding Source Number:		*Funding Source Name: <input type="text" value=""/>
*Expenditure Type:	<input type="text"/>	
*Budget Entity:	<input type="text"/>	Budget Entity Name

▼ [Contract Information](#)

Contract Description:

25 Click search to pull up the task numbers

Contract Info | Document | Approvals | DocuSign Envelopes << >>

[Collapse All](#)

*Record Type: ▾

▼ [Amendment Information](#)

*Is the Contract Project Related?: Yes No

▼ [Project Information](#)

*Project Number: 🔍

*Task Number: 🔍

*Award Number: 🔍

Funding Source Number:

*Expenditure Type: 🔍

*Budget Entity: 🔍

Project Name: [Ascendium - GYO Teacher Education](#)

Task Name:

Award Name:

*Funding Source Name: ▾

Budget Entity Name:

▼ [Contract Information](#)

Contract Description:

26 The red arrow is used to import the information

Save ▾ | Cancel ▾ | ⋮ | Contract

Save as Draft

*Company Name: [ACME Block and Brick INC.](#) 🔍

*Contract Title:

Contract Info | Document | Approvals | DocuSign Envelopes << >>

[Collapse All](#)

*Record Type: ▾

▼ [Amendment Information](#)

*Is the Contract Project Related?: Yes No

▼ [Project Information](#)

*Project Number: 🔍

*Task Number: 🔍

*Award Number: 🔍

Funding Source Number:

*Expenditure Type:

Look Up Project Code

Search... [Show All](#)

[Search Options](#)

Status: 1 record(s) found, 1 page(s) [Click for details...](#)

ID	Project Name	Task Number ↑	Task Name
🔍	Ascendium - GYO Teacher Education	1.0	Task 1.0

27 To find the award number click on the search icon

Contract Info | Document | Approvals | DocuSign Envelopes << >>

[Collapse All](#)

*Record Type: New Contract ▾

▼ [Amendment Information](#)

*Is the Contract Project Related?: Yes No

▼ [Project Information](#)

*Project Number: 🔍

*Task Number: 🔍

*Award Number: 🔍

Funding Source Number:

*Expenditure Type:

*Budget Entity: 🔍

Project Name: [Ascendium - GYO Teacher Education](#)

Task Name: [Task 1.0](#)

Award Name:

*Funding Source Name: ▾

Budget Entity Name:

▼ [Contract Information](#)

Contract Description:

28 Import the information with the red arrow

Save ▾ Cancel ▾ ⋮ Contract

Save as Draft

*Company Name: [ACME Block and Brick INC.](#) 🔍

*Contract Title:

Contract Info | Document | Approvals | DocuSign Envelopes << >>

[Collapse All](#)

*Record Type: New Contract ▾

▼ [Amendment Information](#)

*Is the Contract Project Related?: Yes No

▼ [Project Information](#)

*Project Number: 🔍

*Task Number: 🔍

*Award Number: 🔍

Funding Source Number:

*Expenditure Type:

Look Up Project Code

Search... Go Show All

[Search Options](#)

Status: 1 record(s) found, 1 page(s) [Click for details...](#)

ID	Award Number ↑	Award Name
🔍	2003437	Ascendium - GYO Teacher Education

29 Enter or look up the expenditure type

Record Type: New Contract

Amendment Information

*Is the Contract Project Related?: Yes No

Project Information

*Project Number:

Project Name: [Ascendium - GYO Teacher](#)

*Task Number:

Task Name: [Task 1.0](#)

*Award Number: [2003437](#)

Award Name: [Ascendium - GYO Teacher](#)

Funding Source Number: [100146](#)

*Funding Source Name: [Ascendium Education Solutio](#)

*Expenditure Type:

*Budget Entity:

Budget Entity Name

Contract Information

Contract Description:

*Contract Category:

Contract Type:

*Foreign Contract?:

30 Use the red arrow to import

*Company Name: [ACME Block and Brick INC.](#)

*Contract Title:

Contract Info | Document | Approvals | DocuSign Envelopes

Collapse All

*Record Type: New Contract

Amendment Information

*Is the Contract Project Related?: Yes No

Project Information

*Project Number:

*Task Number:

*Award Number: [2003437](#)

Funding Source Number: [100146](#)

*Expenditure Type:

*Budget Entity:

Contract Information

Search... Go [Show All](#)

[Search Options](#)

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page Go

Edit	ID ↓	Natural Account	Expenditure Category	Expenditure Type
	128	583100	Other Direct Costs	Sales Tax
	127	582100	Subawards	Subawards over 25K
	126	581100	Subawards	Subawards up to 25K
	125	576160	Equipment &...	Miscellaneous Capita
	124	576150	Equipment &...	Fixed Equipment Bui
	123	576140	Equipment &...	Special Contractual
	122	576130	Equipment &...	Engineering and Ins
	121	576120	Equipment &...	Designer Fees Buildi
	120	576110	Equipment &...	Construction Contra
	119	573250	Equipment &...	Fixed Equipment Lar
	118	573240	Equipment &...	Special Contractual

31 Enter the expenditure organization

[- GYO Teacher Education](#)

[- GYO Teacher Education](#)

Education Solutions Inc

Expenditure Organisation:

32 Enter the budget entity

*Is the Contract Project Related?: Yes No

[Project Information](#)

*Project Number:	<input type="text" value="SPN108673"/>	Project Name:	Ascendium - GYO Teacher Education
*Task Number:	<input type="text" value="1.0"/>	Task Name:	Task 1.0
*Award Number:	2003437	Award Name:	Ascendium - GYO Teacher Education
Funding Source Number:	100146	*Funding Source Name:	<input type="text" value="Ascendium Education Solutions"/>
*Expenditure Type:	Subawards up to 25K	Budget Entity Name:	<input type="text"/>
*Budget Entity:	<input type="text"/>		

[Contract Information](#)

Contract Description:

*Contract Category:	<input type="text"/>	Contract Type:	<input type="text"/>
*Foreign Contract?:	<input type="text" value="No"/>		
*Contract Start Date:	<input type="text"/>	*Contract End Date:	<input type="text"/>

33

Related?: Yes No

Project Information

*Project Number:	SPN108673	Project Name:	Ascendium - GYO Teacher I
*Task Number:	1.0	Task Name:	Task 1.0
*Award Number:	2003437	Award Name:	Ascendium - GYO Teacher I
Funding Source Number:	100146	*Funding Source Name:	Ascendium Education Solutio
*Expenditure Type:	Subawards up to 25K		
*Budget Entity:	01	Budget Entity Name:	

Contract Information

Contract Description:

*Contract Category:		Contract Type:	
*Foreign Contract?:	No		
*Contract Start Date:		*Contract End Date:	

34 Enter a description of the contract

Related?: Yes No

GL Account Information

*Entity:	01	Entity Name:	UT
*Fund:	1100001	Fund Name:	Ed
*Department Code:	011415	Department Name:	Un
Account Number:	539100	Account Description:	Op
*Program:	260	Program Name:	Ins
*Activity:	0000	Activity Name:	De

Contract Information

Contract Description:

*Contract Category:		Contract Type:	
---------------------	--	----------------	--

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35 Select the contract category

*Program: 260 Program Name: [Institutional Support](#)
*Activity: 0000 Activity Name: [Default Activity](#)

▼ [Contract Information](#)

Contract Description:

*Contract Category: **Hotel** Contract Type:
*Foreign Contract?: No

*Contract Start Date: *Contract End Date:

Notification Name(s):

▼ [Financial Information](#)

*Competitive Type: No Bid (NCJ Required)

No-Bid Explanation: Required if amount is equal to or greater than \$10,000 and the contract wasn't bid. Please attach a completed NCJ form. Once you complete the form, please attach in the Documents tab under the document type "Non-Competitive Justification (NCJ) Form". The NCJ form is available at this website: <https://procurement.tennessee.edu/contracts/forms/>

36 Select the contract type (payable, receivable, zero dollar, etc.)

260 Program Name: [Institutional Support](#)
0000 Activity Name: [Default Activity](#)

Enter a description of your contract here.

Hotel Contract Type: **Payable Contract**
No

*Contract End Date:

\$

No Bid (NCJ Required)

Required if amount is equal to or greater than \$10,000 and the contract wasn't bid. Please attach a completed NCJ form

37 Select your contract start and end dates

*Activity: 0000 Activity Name: [Default Activity](#)

Contract Information

Contract Description: Enter a description of your contract here.

*Contract Category: Hotel Contract Type: Payable Contract

*Foreign Contract?: No

*Contract Start Date: *Contract End Date:

Notification Name(s):

Financial Information

*Payable Amount: \$

*Competitive Type: No Bid (NCJ Required)

No-Bid Explanation: Required if amount is equal to or greater than \$10,000 and the contract wasn't bid. Please attach a completed NCJ form.

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38

0000 Activity Name: [Default Activity](#)

Enter a description of your contract here.

Hotel Contract Type: Payable Contract

No

1/01/2024 *Contract End Date:

No Bid (NCJ Required)

Required if amount is equal to or greater than \$10,000 and the contract wasn't bid. Please attach a completed NCJ form.

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Tip! As the contract requester, you will automatically receive notifications for this contract. You do not need to enter your own name here.

39 If you need to add someone to notifications do so here.

▼ Contract Information

Contract Description:

*Contract Category: Contract Type:

*Foreign Contract?:

*Contract Start Date: *Contract End Date:

Notification Name(s):

▼ Financial Information

*Payable Amount:

*Competitive Type:

No-Bid Explanation: Required if amount is equal to or greater than \$10,000 and the contract wasn't bid. Please attach a completed NCJ form. Once you complete the form, please attach in the Documents tab under the document type "Non-Competitive Justification (NCJ) Form". The NCJ form is available at this website: <https://procurement.tennessee.edu/contracts/forms/>

In the text box below, please type "See attached NCJ"

No-Bid Explanation / Non-Competitive Justification (NCJ):

40

Look Up Person

shellist [Show All](#) [Advanced Search](#)

Abigail Shellist TEST
Abigail Shellist 228075

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page

<input type="checkbox"/>	ID ↓	Full Name	Department	Budget Entity
<input type="checkbox"/>	89191	Lori Donovan		Martin
<input type="checkbox"/>	89187	Donna Flanagan 369473	011440-UT Department of Technology Solutions	
<input type="checkbox"/>	89184	Erin Young 396023	110400-Associate VC Finance and Administration	
<input type="checkbox"/>	89183	Heather Hodges 385416	530010-Business Services	
<input type="checkbox"/>	89180	Kristen Johnson 372483	407003-Procurement and Contract Services	
<input type="checkbox"/>	89156	Abigail Shellist TEST		University-Wide Administration
<input type="checkbox"/>	89149	SaaSam Test		Chattanooga
<input type="checkbox"/>	89132	Brandie Paul 403828	604410-Athletic Director	
<input type="checkbox"/>	89131	William Riddle 403530	604260-Tennis	

41 Click this checkbox.

Look Up Person

Abigail Shellist 228075 [Show All](#) [Advanced Search](#)

[Search Options](#)

Status: 1 record(s) found, 1 page(s) [Click for details...](#)

<input type="checkbox"/>	ID ↓	Full Name	Department	Budget Entity
<input type="checkbox"/>	23706	Abigail Shellist 228075	011415-Purchasing	

42 Select "add"

The screenshot shows a search interface with a dark blue sidebar on the left and a main content area. At the bottom of the main content area, there is a search bar with a dropdown menu. The dropdown menu is open, showing five options: "Replace", "Add", "Add/Search Again", "Cancel", and "Clear Field and Close". The "Add" option is highlighted with an orange circle. Below the dropdown menu, there is a text box with the text: "By default, this searches only the Full Name fields in the Person table and its subtables." At the bottom right of the interface, there is a footer that says "Powered by ESM Solutions Corporation".

43 Enter your contract's payable amount

The screenshot shows a contract form with various fields. The "Contract Category" is set to "Hotel" and "Contract Type" is "Payable Contract". "Foreign Contract?" is "No". "Contract Start Date" is "11/01/2024" and "Contract End Date" is "11/04/2024". "Notification Name(s)" is "Abigail Shellist 228075". The "Financial Information" section is expanded, and the "Payable Amount" field is highlighted with an orange circle, showing "\$ 4,500". "Competitive Type" is "No Bid (NCJ Required)". Below this, there is a text box with the text: "No-Bid Explanation: Required if amount is equal to or greater than \$10,000 and the contract wasn't bid. Please attach a completed Once you complete the form, please attach in the Documents tab under the document type "Non-Competitive Justification (NCJ) Form". The NCJ form is available at this website: <https://procurement.tennessee.edu/contracts/forms/>. In the text box below, please type "See attached NCJ". Below this, there is a text box for "No-Bid Explanation / Non-Competitive Justification (NCJ)". At the bottom, "Payee Named in Grant" is "No". The "IT Billing & Shipping Information" section is partially visible at the bottom.



Tip! If you select No Bid- NCJ Required, please be sure to attach a copy of your NCJ form when you are uploading your contract document.

44 Select the competitive type

*Contract Category: Contract Type:

*Foreign Contract?:

*Contract Start Date: *Contract End Date:

Notification Name(s):

[Financial Information](#)

*Payable Amount:

*Competitive Type:

[UT Billing & Shipping Information](#)

*Shipping Street Address 1: *Shipping Location Name:

Shipping Address:

Same Billing Address:

*Billing Street Address 1: *Billing Location Name:

Billing Address:

[Vendor Information](#)

45

Select your ship-to address by selecting the street address and shipping location name

*Contract Category: Contract Type:

*Foreign Contract?:

*Contract Start Date: *Contract End Date:

Notification Name(s):

Financial Information

*Payable Amount:

*Competitive Type:

UT Billing & Shipping Information

*Shipping Street Address 1: *Shipping Location Name:

Shipping Address:

Same Billing Address:

*Billing Street Address 1: *Billing Location Name:

Billing Address:

Vendor Information

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46

Page: [Page 1] [Next](#) [Last](#) Go to page [Go](#)

ID	Street Address 1 ↑
	#10 Public Sq, Hunter-Matthews Bldg
	1 Bethel Valley Road, Bldg 4100
	10 Wayne Fisher Drive
	100 Court Circle
	100 Jacob Drive
	100 Main Avenue
	100 Main Street
	100 North Main Street, Room 213
	100 South Gay Street

Page: [Page 1] [Next](#) [Last](#) Go to page [Go](#)

47 Click this image.

Contract Type:





























*Contract End Date:

*Shipping Location Name:

*Billing Location Name:

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48 Click the red arrow to import your selection.

		University of Tennessee	50311800_02_248	Meek Library_02_248
		University of Tennessee	50652300_04_401	Wayne County Extension Center_04_401
		University of Tennessee	50166400_01_100	Garden Pavilion_01_100
		University of Tennessee	50609700_01_101A	Unicoi County Courthouse_01_101A
		University of Tennessee	50930000_01_102	Lawrence D. Bromley Training Center_01_102
		University of Tennessee	50607900_02_213C	Anderson County Courthouse_02_213C
		University of Tennessee	50987000_01_114	100 S. Gay St-(Gallery 1010 @Emporium)_01_114
		University of Tennessee	50652000_01_108	Haywood County Extension Center_01_108
		University of Tennessee	50661400_01_100	Lone Oaks 4-H - Cattle Handling Facility_01_100
		University of Tennessee	50117000_01_102	Burchfiel Geography Building_01_102
		University of Tennessee	50112300_02_259	James A Haslam II Business Building_02_259
		University of Tennessee	50662400_01_100	Lone Oaks 4H - The Clay's Main Bldg_01_100
		University of Tennessee	50121900_01_106B	Pasqua Nuclear Engineering Building_01_106B
		University of Tennessee	50317100_01_1B	Motor Pool_01_1B

Cancel **Clear Field and Close**

49

If your bill-to is the same as ship-to, check this box. Otherwise, you can select a bill-to address.

*Foreign Contract?: No

*Contract Start Date: 11/01/2024

*Contract End Date: 11

Notification Name(s): Abigail Shellist 228075

Financial Information

*Payable Amount: \$ 4,500

*Competitive Type: No bid (less than \$10,000 cumulative)

UT Billing & Shipping Information

*Shipping Street Address 1: 100 Main Avenue

*Shipping Location Name: Lc

Shipping Address: 1000 New Hope Road, 100, Lone Oaks 4-H - Cattle Handling Facility, 01, Middleton, T

Same Billing Address:

*Billing Street Address 1:

*Billing Location Name:

Vendor Information

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50

To select a company contact, click on the magnifying glass.

[please type "See attached NCJ"](#)

Competitive Justification (NCJ):

No

6000303

ACME Block and Brick INC. - PO BOX 831 1204 SOUTH KENTUCKY ST

Site Number:

No records.

New Contact Last Name:

New Contact Role:

New Contact Fax:

act

Tab

51 If you see the contact you want to use, check the box next to their name

Look Up Person

Search... **Go** [Show All](#) [Advanced Search](#)

[Search Options](#)

Status: 1 record(s) found, 1 page(s) [Click for details...](#)

<input type="checkbox"/>	Edit	View	ID ↓	LDAP User ID	Full Name	Telephone	Group	Primary Team
<input checked="" type="checkbox"/>			89174	ashellis@utk.edu	john doe		Ag Experiment Station CCO Group Buyer Contract Approver...	Ag Experiment Station CCO Team

52 and click on replace

Replace **Add** **Add/Search Again** **Cancel**

By default, this searches only the Full Name, Company ID, ID, Email fields in the Person table and its subtables.

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53

If you need to add a new contact, fill out first and last name along with email address and select their role. Then you can click on save company contact.

Payee Named in Grant:

▼ [Vendor Information](#)

Company Number:

*Location Name:

*Vendor Contact(s):

▼ [New Vendor Contact](#)

New Contact First Name: New Contact Last Name:

New Contact Email: New Contact Role:

New Contact Telephone: New Contact Other Role:

New Contact Fax:

Save Company Contact

Save and Go to Next Tab

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54

Click save and go to next tab

Company Number:

*Location Name:

*Vendor Contact(s):

1 record(s) found, 1 page(s). Click [here](#) to count records again.

<input type="checkbox"/>	Edit	View	ID ↓	LDAP User ID	Full Name	Telephone
<input type="checkbox"/>			89174	ashellis@utk.edu	john doe	

▼ [New Vendor Contact](#)

New Contact First Name:

New Contact Last Name:

New Contact Email:

New Contact Role:

New Contact Telephone:

New Contact Fax:

Save Company Contact

Save and Go to Next Tab

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55 Add your draft contract and any supporting documents

***Contract Title:**

Contract Requester: [Test Portal](#)

[Contract Info](#) **[Document](#)** [Purchase Order](#) [Approvals](#) [DocuSign Envelopes](#) << >>

[Collapse All](#)

▼ [Contract Documents](#)

Contract Documents:

No records.

Add New Document

Send the appropriate Tax Exemption Certificate to vendor: <https://controller.tennessee.edu/tax/>

▼ [Related Amendments](#)

Amendments:

No records.

56 You must add a title for each document and select the document type

[Save](#) [Cancel](#) [⋮](#) **Contract Document**

***Title:**

[Document Information](#) << >>


[Collapse All](#)

▼ [Document Information](#)

***Document Type:**

▼ [Attach Documents](#)

***Attach Contract Document:** [Attach/Manage](#)


Drag and drop files

▼ [Contract Information](#)

Contract ID:	114395	Contract Title:	Hotel Reservations for Board of Trustees Meeting
Contract Competitive Type:	No bid (less than \$10,000 cumulative)	Contract Contract Category:	Hotel
Contract Start Date:	11/01/2024	Contract End Date:	11/04/2024

57 You can drag and drop or click on attach/manage to select a file

Save Cancel Contract Document

*Title: draft contract

Document Information << >>

Collapse All

Document Information

*Document Type: Draft Contract

Attach Documents

*Attach Contract Document: Attach/Manage

Drag and drop files

Contract Information

Contract ID:	114395	Contract Title:	Hotel Reservations for Board of
Contract Competitive Type:	No bid (less than \$10,000 cumulative)	Contract Contract Category:	Hotel
Contract Start Date:	11/01/2024	Contract End Date:	11/04/2024

58 Click this button field.

Attachments

Attachments: 0 Files Total Size: 0 Bytes

Local source

Attach File(s)

59 Once you select your file, click "finish"

Total Size: 1.04 MBytes

N/A 1.04 MBytes

Finish **Cancel**

60 Click "Save"

Save **Cancel** **⋮** Contract Document

*Title:

Document Information << >>

[Collapse All](#)

▼ **Document Information**

*Document Type:

▼ **Attach Documents**

*Attach Contract Document: [Attach/Manage](#)

1. [Diligent_8500017068.pdf](#)

▼ **Contract Information**

Contract ID:	114395	Contract Title:	Hotel Reservations for Board of
Contract Competitive Type:	No bid (less than \$10,000 cumulative)	Contract Contract Category:	Hotel
Contract Start Date:	11/01/2024	Contract End Date:	11/04/2024
Contract Requester:	Test Portal	Contract Vendor Company:	ACME Block and Brick INC.
Contract Description:	Enter a description of your contract here.		

61 Click "Approvals"

Save Cancel Contract

Save as Draft

ID: 114395 Status: Draft

Contract Number: 9500069130

*Company Name: [ACME Block and Brick INC.](#)

*Contract Title: Hotel Reservations for Board of Trustees Meeting

Contract Requester: [Test Portal](#)

Contract Info Document Purchase Order **Approvals** DocuSign Envelopes << >>

[Collapse All](#)

▼ Contract Documents

Contract Documents:

+ Add filters

1 record(s) found, 1 page(s). Click [here](#) to count records again.

<input type="checkbox"/>	Edit	View	ID ↓	Title	Document Type	Contract Title
<input type="checkbox"/>			75920	draft contract	Draft Contract	Hotel Reservations for Board of...

Add New Document

62 If you need to add notes, you can do so here

Contract Number: 9500069130

*Company Name: [ACME Block and Brick INC.](#)

*Contract Title: Hotel Reservations for Board of Trustees Meeting

Contract Requester: [Test Portal](#)

Contract Info Document Purchase Order **Approvals** DocuSign Envelopes << >>

[Collapse All](#)

▼ Approval Information

Approval Notes:

Edit HTML plain text

Approvals Needed:

No records.

Number of Approvals Needed:	0	Number of Approvals Received:	0
-----------------------------	---	-------------------------------	---

Submit for Review

63 Once you are ready, click "submit for review"

Approval Information

Approval Notes:

Edit HTML plain text

Approvals Needed:
No records.

Number of Approvals Needed:	0	Number of Approvals Received:	0
-----------------------------	---	-------------------------------	---

Submit for Review

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64 Click "My Contracts" to go back in to see the draft contract you just submitted

The University of Tennessee Contract Management Portal

- My Profile**
Manage your user profile
- Submit a Contract**
Submit a new contract
- My Contracts**
View your previously submitted contracts
- All Contracts**
View all contracts
- My Approvals**
All contracts pending your approval
- All Approvals**
View all approvals

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