

Editors' Guide to AgreeDB and Agreements Transmittal Form

Definitions:

- Agreements: Referencing contracts, agreements, and grant awards; treated in the same manner, but strictly referenced as Agreements to avoid confusion.
- Generating Department: Department that is initiating an agreement.
- Agreement Owner: Person within the generating department that is responsible for the agreement through its lifespan and completion of agreement tasks (regardless of the task assignee).
- Supplementary Documents: Amendments/Addendums, Task Orders, Change Orders within the AgreeDB system.
- Task Assignee: Potentially different than Agreement Owner. Task Assignee (when not an agreement owner) is delegated to complete the outstanding and assigned task related to the agreement or supplementary document. Agreement Owner and assignee must be from the same generating department.

Index:

- **Navigating AgreeDB** **Page 2**
 - AgreeDB Homepage Page 2
 - Agreements Tab Page 2
 - Contacts Tab Page 4
 - Create New Agreement Page 5
 - Agreement Landing Page Page 7
 - Supplementary Documents Page 7
 - Tasks Page 10
- **Agreements Transmittal Transfer to AgreeDB** **Page 13**
 - Type of Document Page 13
 - Basic Agreement Information on Transmittal Page 17
 - Supp. Docs, Extension of Agreement and Tasks Page 29
- **AgreeDB Reports** Page 40
- **AgreeDB Outlook Notifications** Page 40
- **AgreeDB Calendar** Page 42

Navigating AgreeDB:

AgreeDB Homepage:

The screenshot shows the AgreeDB homepage. At the top, there is a navigation bar with tabs for 'Home', 'Agreements', and 'Contacts'. A search bar is located to the right of the navigation bar. Below the navigation bar, there is a 'Create New Agreement' button. The main content area is titled 'Upcoming Agreement Expirations' and contains a table with three rows of data.

Agreement ID	Agreement Name	Expiration Date
190001	Road Realignment (Test), GRANITE CONSTRUCTION CO	07/01/20
200001	Parks & Recreation Landscaping (Test), A1 JANITORIAL SUPPLY	07/02/20
200002	Specific Terms Agreement (Test), LACEY GASTELLUM	08/04/20

- **Navigation Bar at the Top:**
 - Home Tab: Links back to the Homepage
 - Agreements Tab: Links to a more advanced Search and Filter feature
 - Contacts Tab: A quick look for Vendor contact information when entered into the agreement details.
 - Search Bar: A quick search for agreements based on basic agreement information (does not find supplementary documents)
- **Upcoming Agreement Expirations:**
 - This feature lists the top 10 agreements with upcoming expiration dates based on the most immediate deadline.
- **Create New Agreement Button:**
 - This generates a new agreement and landing page for it.

Agreements Tab:

- **Search and Filter:** Finds agreements and supplementary documents based on information selected.

The screenshot shows the 'Filter & Search' interface. It features a search bar at the top and a grid of filter fields. Below the filters, there is a 'Search' button and a message indicating that no results were found.

Filter & Search

Agreement Type	Department	Vendor Type	Vendor	
--- SELECT ---	-- SELECT --	--- SELECT ---	Enter Vendor Name / Number	
Project	Start Date	End Date	Status	Fiscal Year
Enter Project Name / Number	mm/dd/yyyy	mm/dd/yyyy	--- SELECT ---	--- SELECT ---

Results (0)
There are no results to display.

- Example of Search:
 - Select filter and click on the option (click on option even if it is an autofill and it is the only option available).

Filter & Search

Agreement Type: --- SELECT ---

Department: -- SELECT --

Vendor Type: --- SELECT ---

Vendor: Enter Vendor Name / Number

Project: Enter Project Name / Number

Status: --- SELECT ---

Fiscal Year: --- SELECT ---

Search

Results (0)
There are no results to display.

Department dropdown options:

- SELECT --
- AIRPORT OPERATIONS - 9200
- BUILDING SAFETY - 2200
- CIP ENGINEERING DIVISION - 4300
- COMMUNITY & NEIGHBORHOOD SERVICES - 6100
- ECONOMIC & TOURISM DEVELOPMENT - 1800
- ENGINEERING - 2400
- FINANCE - 1500
- HUMAN RESOURCES - 1400
- LEGAL - 1600
- MAGISTRATE COURT - 3200
- MAYOR COUNCIL - 1100
- NON-DEPARTMENTAL - 0000
- PARKS & RECREATION - 5100
- PLANNING - 2300
- POLICE - 3100
- PUBLIC WORKS - 4100
- RECORDS CENTER - 2100
- TECHNOLOGY SERVICES - 1700
- TOWN CLERK - 1300

- Once selected then press search and all the relevant agreements and supplementary documents will be available (pictured below).
 - From this list you can click on the individual agreements or supplementary documents themselves, edit them, or delete them.

Filter & Search

Agreement Type: --- SELECT ---

Department: AIRPORT OPERATIONS - 9200

Vendor Type: --- SELECT ---

Vendor: Enter Vendor Name / Number

Project: Enter Project Name / Number

Start Date: mm/dd/yyyy

End Date: mm/dd/yyyy

Status: --- SELECT ---

Fiscal Year: --- SELECT ---

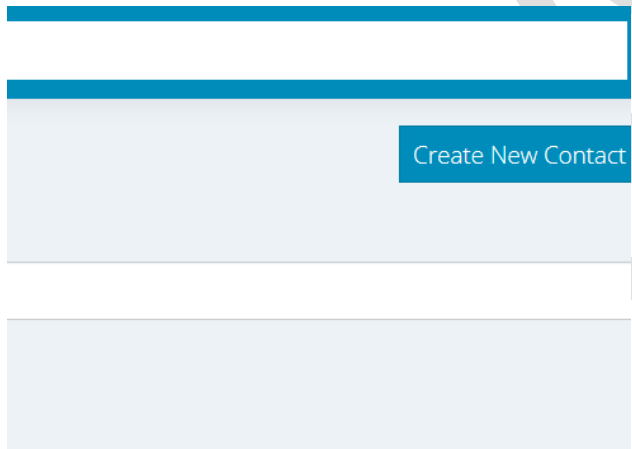
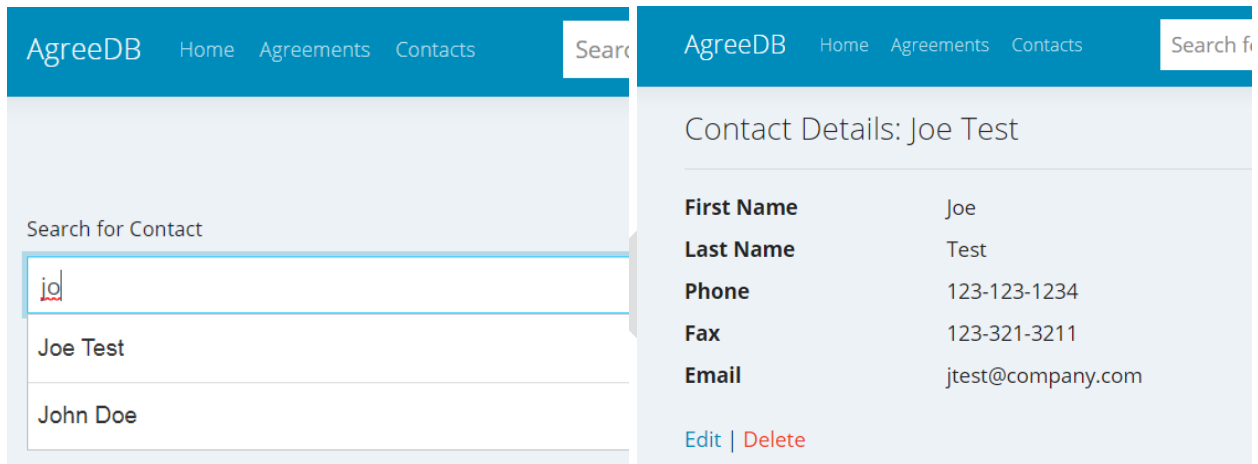
Search

Results (7)

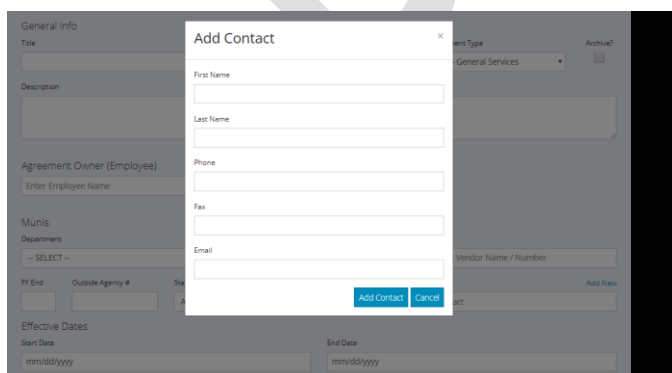
Title	End Date	
190002 - Test Agreement for Testing Reasons, TESTOUT CORPORATION	09/11/19	Edit Delete
190002.001 - Test Agreement Amendment, TOWN OF MARANA	06/12/21	Edit Delete
190002.002 - Test Agreement Amendment #2, TOWN OF MARANA	06/12/21	Edit Delete
200002 - Specific Terms Agreement (Test), LACEY GASTELLUM	08/04/20	Edit Delete
200002.001 - amendment test, LACEY GASTELLUM	Unknown	Edit Delete
200002.002 - test task order, LACEY GASTELLUM	Unknown	Edit Delete
200002.003 - Change Order , LACEY GASTELLUM	Unknown	Edit Delete

Contacts Tab:

- Search for vendor contact information by name.
 - When vendor information is submitted on the agreements landing page that information will automatically transfer to this section.
 - Once filling in the person's name associated with the vendor a dropdown list will appear, click on the name you were searching for and it will populate their first name, last name, phone number, fax, and email.



- Add a vendor contact.
 - Click on the "Create New Contact" button to add on the very right hand side below the search bar.



- Within the "Create New Contact" page there will be extra information. Please disregard: department, town employee, and status.
- Click on create once you have completed this section.

Create New Agreement:

- This button will create new agreements, this section is not for adding supplementary documents (amendments, addendums, change order, or task order).

The screenshot shows the AgreeDB interface. At the top, there is a navigation bar with 'Home', 'Agreements', and 'Contacts' links, and a search bar labeled 'Search for agreement...'. Below the navigation bar, there is a 'Create New Agreement' button highlighted with a red box. Underneath, there is a section titled 'Upcoming Agreement Expirations' with a table listing three agreements:

Agreement ID	Agreement Name	Expiration Date
200001	Parks & Recreation Landscaping (Test), A1 JANITORIAL SUPPLY	07/02/20
200002	Specific Terms Agreement (Test), PIMA COUNTY DEPARTMENT OF	08/04/20
190003	JOC for Water Production Facilities, BORDERLAND CONSTRUCTION CO INC	12/31/20

- There are five sections within the “New Agreement” editing page, all information needing to be entered must come from the Agreements Transmittal Form that generating agreements will fill out.

The screenshot shows the 'New Agreement' editing page. The page is divided into several sections:

- General Info:** Includes fields for 'Title', 'Agreement Type' (dropdown menu with '005 - General Services' selected), and 'Archive?' (checkbox).
- Description:** A large text area for entering the agreement description.
- Agreement Owner (Employee):** A text field labeled 'Enter Employee Name'.
- Munis:** Includes fields for 'Department' (dropdown menu with '-- SELECT --'), 'Munis Project' (text field labeled 'Enter Project Name / Number'), and 'Vendor' (text field labeled 'Enter Vendor Name / Number').
- Effective Dates:** Includes fields for 'FY End', 'Outside Agency #', 'Status' (dropdown menu with 'Active' selected), 'Resolution #', and 'Vendor / Ext Contact' (text field labeled 'Enter existing contact'). There is also an 'Add New' link.
- Notes:** A large text area for entering notes.

At the bottom right of the page, there are 'Cancel' and 'Create' buttons.

- General Information
 - Title (assigned by the generating department)
 - Agreement Type (dropdown menu)

- Agreement Type “005-General Services” will automatically populate when creating a new agreement.
 - Archive
 - On the Agreements Transmittal this can be found at the calendar and/or fiscal year section (please see section “Agreements Transmittal Transfer to AgreeDB” for more details)
 - The “Archive” box within AgreeDB should be checked for any agreements older than 2019.
 - It is important to archive older documents otherwise it will cause permanent issues for future agreements with the AgreeDB numbering sequence (see “Agreement Landing Page” in this section of this document for more details).
 - Description should include the outside agency information when it is not available within Munis.
- Agreement Owner
 - Once the name is being typed an autofill should pop-up with the Marana employee’s full name. Click on the name once found.
- Munis
 - Department (this is a dropdown menu)
 - Munis Project (this is an autofill section that can be searched by project name or number).
 - Vendor (this is an autofill section that can be searched by vendor name or number)
 - FY End (a two digit option for the fiscal year of the agreement).
 - Outside Agency # (a reference to the agreement number given by an outside agency)
 - Status (for information regarding if an agreement is active, inactive, or destroyed- disregard for now).
 - Resolution # (the linking resolution number)
 - Vendor/External Contact (the primary point of contact’s information for a vendor or external contract)
 - Click “Add New to enter first name, last name, phone, fax, and email
- Effective Dates
 - Start and End Date
 - Once selected this section can be typed in, arrowed in (first red box and on the left), or selected by calendar (second box and to the right).

- Notes
 - This section includes information departments provide such as extension information or other details provided.

- Hit “Create” once all relevant information is completed.

Agreement Landing Page:

- Once an agreement has been created it will direct the user to that agreement’s landing page.
- On this landing page is a new section that was not entered on the previous page, “Marana’s Agreement #”.
 - This is an auto-generated number that is also referenced as an internal agreement number (YYNNN)
 - The Year (YY) is the creation date that the agreement was entered into the agreement system. The second set of numbers (NNNN) is an automated counter and is generated every time a new agreement is created.
 - In some instances, the year will show as “99” which is to signify an agreement or supplementary document prior to 2019. This is determined by the “Archive” box.

Agreement Details Edit | Delete

General Info

JOC for Water Production Facilities
19 - 005 - General Services
Cooperative (Linking) Agreement #181807

Agreement Owner (Employee)
Andrea Sirois (asirois@maranaaz.gov)

Department
TOWN MANAGER - 1200

Munis Project
WATER RECLAMATION FACILITY STUDY - WR002

Munis Vendor
BORDERLAND CONSTRUCTION CO INC - 1796 - CONTRACTOR

Marana's Agreement #	Outside Agency #	Status	Resolution #	Vendor / Ext Contact
190003	#81807	Active		Clint Elder

Effective Dates
06/10/19 - 12/31/20

Notes
as needed services

Tasks
There are no tasks assigned to this agreement.

Supplementary Documents:

- This section will only populate after an agreement has been created.
 - Supplementary Documents include Addendums, Amendments, Change Orders, and Task Orders.
 - To add a supplementary document click on “edit” at the top right corner across from “Agreement Details”.

General Info

Title: JOC for Water Production Facilities

Description: Cooperative (Linking) Agreement #181807

Department: TOWN MANAGER - 1200

Munis Project: WATER RECLAMATION FACILITY STUDY

Vendor: BORDERLAND CONSTRUCTION CO INC

FY End: 19

Outside Agency #: #81807

Status: Active

Resolution #:

Vendor / Ext Contact: Clint Elder

Agreement Owner (Employee): Andrea Sirois

Effective Dates

Start Date: 06/10/2019

End Date: 12/31/2020

Add Supplement

Supplement Type

- Amendment
- Amendment
- Addendum
- Task Order
- Change Order

- There are some sections within the “New Supplement” landing page that will auto-populate:
 - Agreement Type
 - Agreement Owner (Employee)
 - Munis Information.

New Supplement

General Info

Title:

Agreement Type: 005 - General Services

Archive?

Description:

Agreement Owner (Employee): Andrea Sirois

Munis

Department: TOWN MANAGER - 1200

Munis Project: WATER RECLAMATION FACILITY STUDY

Vendor: BORDERLAND CONSTRUCTION CO INC

FY End: 19

Outside Agency #: #81807

Status: Active

Resolution #:

Vendor / Ext Contact: Clint Elder

Effective Dates

Start Date: mm/dd/yyyy

End Date: mm/dd/yyyy

Notes:

Cancel [Create](#)

- After entering other information hit “create” and it will become a linking document to the agreement.

Effective Dates		
08/05/19 - 08/04/20		
Notes		
Supplemental Documents		
200002.001 - amendment test	Addendum	note for test amendment
200002.002 - test task order	Task Order	
200002.003 - Change Order	Change Order	This change order text

Tasks:

- This section will only populate after an agreement has been created. It will state “There are no tasks assigned to this agreement.”

JOC for Water Production Facilities
 19 - 005 - General Services
 Cooperative (Linking) Agreement #181807

Agreement Owner (Employee)
 Andrea Sirois (asirois@maranaaz.gov)

Department
 TOWN MANAGER - 1200

Munis Project
 WATER RECLAMATION FACILITY STUDY - WR002

Munis Vendor
[BORDERLAND CONSTRUCTION CO INC - 1796 - CONTRACTOR](#)

Marana's Agreement #	Outside Agency #	Status	Resolution #	Vendor / Ext Contact
190003	#81807	Active		Clint Elder

Effective Dates	
06/10/19 - 12/31/20	
Notes	
as needed services	
Tasks	
There are no tasks assigned to this agreement.	

- To add a task click on “edit” at the top right corner across “Agreement Details”.

Agreement Details

[Edit](#) [Delete](#)

General Info

JOC for Water Production Facilities
19 - 005 - General Services
Cooperative (Linking) Agreement #181807
Agreement Owner (Employee)
Andrea Sirois (asirois@maranaaz.gov)
Department
TOWN MANAGER - 1200
Munis Project

- Once the new page has been opened the “Update Agreement” page then scroll down to the very bottom there is a “Task” section with blank categories (Task, Assignee, Due, Done?)
 - Click on “Add New” for tasks to enter a new one.

General Info

Title	JOC for Water Production Facilities		Agreement Type	005 - General Services	
Description	Cooperative (Linking) Agreement #181807				
Department	Munis Project	Vendor			
TOWN MANAGER - 1200	WATER RECLAMATION FACILITY STUDY	BORDERLAND CONSTRUCTION CO INC			
FY End	Outside Agency #	Status	Resolution #		
19	#81807	Active			
Vendor / Ext Contact	Add New		Agreement Owner (Employee)		
Clint Elder			Andrea Sirois		
Effective Dates					
Start Date	End Date				
06/10/2019	12/31/2020				
Notes	as needed services				
Supplemental Documents	Add New				
Tasks	Add New				
Task	Assignee	Due	Done?		

[Cancel](#) [Save](#)

- An “Add Task” window will appear.

The image shows a screenshot of a web application interface. In the foreground, there is a modal window titled "Add Task". This modal contains several input fields: a "Task Type" dropdown menu currently showing "--- SELECT ---"; a "Description" text box; a "Due Date" text box with a date format of "mm/dd/yyyy"; a "Notifications (Days)" section with four radio button options: 30, 60, 90, and 120; a "Notes" text area; an "Assignee" text box; and an "Assignee Email" text box. At the bottom right of the modal are two buttons: "Add Task" and "Cancel".

In the background, a "General Info" form is visible but dimmed. It includes fields for "Title" (JOC for Water Production Facilities), "Description" (Cooperative (Linking) Agreement #181807), "Department" (TOWN MANAGER - 1200), "FY End" (19), "Outside Agency #" (#81807), "Vendor / Ext Contact" (Clint Elder), "Start Date" (06/10/2019), and "Notes" (as needed services). There are also links for "Supplemental Documents" and "Add New".

- A dropdown menu will be available for Task Types.
 - Task Types will open first with the options of general compliance, agreement payment terms, notice to proceed, bond updates, certificate of insurance, or agreement renewal.
 - Description section
 - This may remain a blank field in most cases.
 - Due date that is required or a task and notification feature will not function properly.
 - Notification frequency in 30, 60, 90, 120 day increments
 - If not declared then select all.
 - Up to 5 notifications can be sent including the 4 notification options and the deadline notification.
 - Notes
 - For details supplied in the Agreements Transmittal Form

Agreements Transmittal Transfer to AgreeDB

Type of Document:

- The "Type of Document" within the Agreements Transmittal Form indicates which type of document that is being entered into the system: Cooperative (Linking) Agreement with Linking #, Marana Original Document, or Supplementary Document (Amendment, Addendum, Task Order, Change Order).

(AGREEMENTS TRANSMITTAL FORM)



AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

AgreeDB Assigned No.:	
AgendaQuick Item No.:	
Finance Staff Initial:	
Rec'd Date/Staff Initial:	

I. Basic Agreement Information

Agreement Title <small>(See IV Below)</small>			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Department No. <small>(See IV Below)</small>	Department
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor/Outside Agency Project No.			

Type of Document <input type="checkbox"/> Cooperative (Linking) Agreement <input type="checkbox"/> Linking #: _____ <input type="checkbox"/> Marana Original Agreement <input type="checkbox"/> Amendment/Addendum <input type="checkbox"/> Task Order <input type="checkbox"/> Change Order AgreeDB # _____ <small>(when parent agreement is in AgreeDB)</small>	Extension of Agreement <input type="checkbox"/> Extension of Agreement <input type="checkbox"/> Extension No. _____ <input type="checkbox"/> No. ____ of ____
--	---

Type of Agreement: (Only Select 1- See IV Below)			
<input type="checkbox"/> 005 General Services	<input type="checkbox"/> 010 Professional/Tech	<input type="checkbox"/> 015 Supplies/Equipment	<input type="checkbox"/> 020 Construction / C.I.P.
<input type="checkbox"/> 025 Government Related	<input type="checkbox"/> 030 Lease Agreement	<input type="checkbox"/> 035 Property Related	<input type="checkbox"/> 040 Development Related
<input type="checkbox"/> 045 Utilities/Water	<input type="checkbox"/> 050 Other		

- Cooperative (Linking) Agreement and Linking #
 - This will be found by “Creating an Agreement on the Homepage”

(AGREEMENTS TRANSMITTAL FORM)

AgreeDB Home Agreements Contacts

Create New Agreement

Upcoming Agreement Expirations

200001 - Parks & Recreation Landscaping (Test), A1 JANITORIAL SUPPLY	07/02/20 ▼
200002 - Specific Terms Agreement (Test), PIMA COUNTY DEPARTMENT OF	08/04/20 ▼
190003 - JOC for Water Production Facilities, BORDERLAND CONSTRUCTION CO INC	12/31/20 ▼

- Linking # is referencing the outside agency’s agreement # to the document itself.
 - Both “Cooperative (Linking) Agreement” with the agency name and “Linking #” will go into the description section of the agreement.

(AGREEMENTS TRANSMITTAL FORM)

MARANA AZ
 AGREEMENTS TRANSMITTAL FORM
 Contract Owner is responsible for filling out this form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

I. Basic Agreement Information

Agreement Title (See IV Below)		
Fiscal Year	Calendar Year	
TOM Generating Department	Staff Name	Department No. (See IV Below) Department
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization
Vendor/Outside Agency Contact Information	Name of Contact	License Number Email
Agreement Start Date	Expiration of Agreement	
Munis Project Name	Munis Project Number	
Vendor/Outside Agency Project No.		

Type of Document

Cooperative (Linking) Agreement
 Linking # _____
 Renewal/Original Agreement
 Amendment/Addendum
 Task Order
 Change Order

Extension of Agreement

Extension of Agreement
 Extension No. _____
 No. of _____

AgreeDB # _____
 (when parent agreement is in AgreeDB)

Type of Agreement: (DOB Select & See IV Below)

<input type="checkbox"/> 005 General Services	<input type="checkbox"/> 010 Professional/Tech	<input type="checkbox"/> 015 Supplies/Equipment	<input type="checkbox"/> 020 Construction / C.I.P.
<input type="checkbox"/> 025 Government Related	<input type="checkbox"/> 030 Lease Agreement	<input type="checkbox"/> 035 Property Related	<input type="checkbox"/> 040 Development Related
<input type="checkbox"/> 045 Utilities/Water	<input type="checkbox"/> 050 Other		

(AGREEDB)

New Agreement

General info
 Title: _____ Agreement Type: 005 - General Services Archive?

Description: _____

Agreement Owner (Employee)
 Enter Employee Name: _____

Munis
 Department: --SELECT-- Munis Project: Enter Project Name / Number Vendor: Enter Vendor Name / Number

PY End: Outside Agency #: Status: Active Resolution #: Vendor / Exc Contact: Enter existing contact Add New

Effective Dates
 Start Date: mm/dd/yyyy End Date: mm/dd/yyyy

Notes: _____

Cancel Create

- Marana Original Agreement
 - This is to indicate that this is a “non-linking” agreement.
 - This will be found by “Creating an Agreement on the Homepage”
 - This will take you to the editing page for “Create New Agreement”

(AGREEDB)

AgreeDB Home Agreements Contacts Search for agreement...

Create New Agreement

Upcoming Agreement Expirations

200001 - Parks & Recreation Landscaping (Test), A1 JANITORIAL SUPPLY	07/02/20
200002 - Specific Terms Agreement (Test), PIMA COUNTY DEPARTMENT OF	08/04/20
190003 - JOC for Water Production Facilities, BORDERLAND CONSTRUCTION CO INC	12/31/20

(AGREEDB)

New Agreement

General info
 Title: _____ Agreement Type: 005 - General Services Archive?

Description: _____

Agreement Owner (Employee)
 Enter Employee Name: _____

Munis
 Department: --SELECT-- Munis Project: Enter Project Name / Number Vendor: Enter Vendor Name / Number

PY End: Outside Agency #: Status: Active Resolution #: Vendor / Exc Contact: Enter existing contact Add New

Effective Dates
 Start Date: mm/dd/yyyy End Date: mm/dd/yyyy

Notes: _____

Cancel Create

- Supplementary Document and AgreeDB#
 - Supplementary documents include Amendments, Addendums, Task Orders, or Change Orders.
 - The procedure has been identified (as of 10/18/2019) that if a supplementary document is received by Finance Department or Town Clerk's Office then there will be an effort to track down the original agreement.
 - Agreements are considered the "parent" and supplementary documents are considered "child" which means that a supplementary agreement cannot be entered without the original agreement or "parent" document.
 - AgreeDB # on the transmittal form is to easily track down the original document when it exists in the system.

(AGREEMENTS TRANSMITTAL FORM)



AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

AgreeDB Assigned No:	
AgendaQuick Item No.	
Finance Staff Initial:	
Rec'd Date/Staff Initial	

I. Basic Agreement Information

Agreement Title <small>(See IV Below)</small>			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Department No. <small>(See IV Below)</small>	Department
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor/Outside Agency Project No.			

Type of Document <input type="checkbox"/> Cooperative (Linking) Agreement <input type="checkbox"/> Linking #: _____ <input type="checkbox"/> Marana Original Agreement <input type="checkbox"/> Amendment/Addendum <input type="checkbox"/> Task Order <input type="checkbox"/> Change Order	Extension of Agreement <input type="checkbox"/> Extension of Agreement <input type="checkbox"/> Extension No. ____ <input type="checkbox"/> No. ____ of ____
<input type="checkbox"/> _____ AgreeDB # <small>(when parent agreement is in AgreeDB)</small>	

Type of Agreement: (Only Select 1 - See IV Below)			
<input type="checkbox"/> 005 General Services	<input type="checkbox"/> 010 Professional/Tech	<input type="checkbox"/> 015 Supplies/Equipment	<input type="checkbox"/> 020 Construction / C.I.P.
<input type="checkbox"/> 025 Government Related	<input type="checkbox"/> 030 Lease Agreement	<input type="checkbox"/> 035 Property Related	<input type="checkbox"/> 040 Development Related
<input type="checkbox"/> 045 Utilities/Water	<input type="checkbox"/> 050 Other		

- Once an agreement has been "created" then a supplementary document can be added in agreeDB by clicking "edit" from the agreement's landing page. Once there it will be at the bottom of the page and you can click "edit".

Department: TOWN MANAGER - 1200
 Munis Project: WATER RECLAMATION FACILITY STUDY
 Vendor: BORDERLAND CONSTRUCTION CO INC

FY End: 19
 Outside Agency #: #81807
 Status: Active
 Resolution #:

Vendor / Ext Contact: Clint Elder
 Add New
 Agreement Owner (Employee): Andrea Sirois

Effective Dates
 Start Date: 06/10/2019
 End Date: 12/31/2020

Notes
 as needed services

Supplemental Documents [Add New](#)

Tasks [Add New](#)

Task	Assignee	Due	Done?
Cancel Save			

Basic Agreement Information on Transmittal:

- The “Basic Agreement Information” within the Agreements Transmittal Form includes: agreement title (different than agreement name), agreement fiscal and/or calendar year, generating department information and agreement owner, vendor information and point of contact, agreement start and end dates, munis information and an vendor/outside agency project number if they have a different number they reference at their agency.
 - Not all information will be able to be filled out for every agreement, but required information:
 - Agreement Title
 - TOM Generating Department
 - Type of Agreement

(AGREEMENTS TRANSMITTAL FORM)



AgreeDB Assigned No:	
AgendaQuick Item No.	
Finance Staff Initial:	
Rec'd Date/Staff Initial	

AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

I. Basic Agreement Information

Agreement Title <i>(See IV Below)</i>			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Series # <i>(See IV Below)</i>	Department
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor/Outside Agency Project No.			

Type of Document	Extension of Agreement
<input type="checkbox"/> Cooperative (Linking) Agreement <input type="checkbox"/> Linking #: _____ <input type="checkbox"/> Marana Original Agreement <input type="checkbox"/> Amendment/Addendum <input type="checkbox"/> Task Order <input type="checkbox"/> Change Order	<input type="checkbox"/> Extension of Agreement <input type="checkbox"/> Extension No. ____ <input type="checkbox"/> No. ____ of ____
_____ AgreeDB #	

Type of Agreement: (Only Select 1- See IV Below)			
<input type="checkbox"/> 005 General Services	<input type="checkbox"/> 010 Professional/Tech	<input type="checkbox"/> 015 Supplies/Equipment	<input type="checkbox"/> 020 Construction / C.I.P.
<input type="checkbox"/> 025 Government Related	<input type="checkbox"/> 030 Lease Agreement	<input type="checkbox"/> 035 Property Related	<input type="checkbox"/> 040 Development Related
<input type="checkbox"/> 045 Utilities/Water	<input type="checkbox"/> 055 Other		

- Agreement Title
 - Generating Department determines this section.
 - Must be 100 words or less.
 - Should not repeat any other information within the Agreements Transmittal Form

(AGREEMENTS TRANSMITTAL FORM)



MARANA AZ AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

AgreeDB Assigned No.	
Agenda/Quick Item No.	
Finance Staff Initial:	
Rec'd Date/Staff Initial	

I. Basic Agreement Information

Agreement Title (See IV Below)			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Series# (See IV Below)	Department
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor/Outside Agency Project No.			
Type of Document		Extension of Agreement	
<input type="checkbox"/> Cooperative (Linking) Agreement <input type="checkbox"/> Linking # _____ <input type="checkbox"/> Marana Original Agreement <input type="checkbox"/> Amendment/Addendum <input type="checkbox"/> Task Order <input type="checkbox"/> Change Order		<input type="checkbox"/> Extension of Agreement <input type="checkbox"/> Extension No. _____ <input type="checkbox"/> No. ____ of ____	
AgreeDB # _____			
Type of Agreement: (Only Select 1: See IV Below)			
<input type="checkbox"/> 005 General Services	<input type="checkbox"/> 010 Professional/Tech	<input type="checkbox"/> 015 Supplies/Equipment	<input type="checkbox"/> 020 Construction / C.I.P.
<input type="checkbox"/> 025 Government Related	<input type="checkbox"/> 030 Lease Agreement	<input type="checkbox"/> 035 Property Related	<input type="checkbox"/> 040 Development Related
<input type="checkbox"/> 045 Utilities/Water	<input type="checkbox"/> 055 Other		

(AGREEDB)

New Agreement

General Info

Title

Description

Agreement Owner (Employee)
Enter Employee Name

Munis
 Department: -- SELECT --
 Munis Project: Enter Project Name / Number
 Vendor: Enter Vendor Name / Number

FY End: Outside Agency #: Status: Active Resolution #: Vendor / Ext Contact: Enter existing contact [Add New](#)

Effective Dates
 Start Date: mm/dd/yyyy End Date: mm/dd/yyyy

Notes

[Cancel](#) [Create](#)

- Agreement Dates
 - Not all Transmittals may have fiscal year or calendar year; it will be most common to see fiscal year on an agreement.
 - Fiscal Year (Fiscal Year End) will be in the Munis section.
 - Calendar Year can be added within the description section in those instances.

(AGREEMENTS TRANSMITTAL FORM)



MARANA AZ

AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

I. Basic Agreement Information

Agreement Title <i>(See IV Below)</i>			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Series # <i>(See IV Below)</i>	Department
Vendor Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor Outside Agency Project No.			

(AGREEDB)

New Agreement

General Info

Tick Agreement Type: 005 - General Services Archive?

Description

Agreement Owner (Employee)
Enter Employee Name

Munis

Department: SELECT -- Munis Project: Enter Project Name / Number Vendor: Enter Vendor Name / Number

PY End: Outside Agency #: Status: Active Resolution #: Vendor / Ext Contact: Enter existing contact Add New

Effective Dates

Start Date: mm/dd/yyyy End Date: mm/dd/yyyy

Notes

Cancel Create

- TOM Generating Department
 - This information is collected for purpose of determining the agreement owner (Marana staff) and corresponding department.
 - There is a resource sheet at the back of the form for a guide to the agreement owners.

(AGREEMENTS TRANSMITTAL FORM)



AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

AgreeDB Assigned No:	
Agenda/Quick Item No.	
Finance Staff Initial:	
Rec'd Date/Staff Initial:	

I. Basic Agreement Information

Agreement Title <small>(See IV Below)</small>			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Department No. <small>(See IV Below)</small>	Department
Vendor/Outside Agency Information			
Vendor/Outside Agency Contact Information		Name of Contact	Phone Number / Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor/Outside Agency Project No.			
Type of Document		Extension of Agreement	
<input type="checkbox"/> Cooperative (Linking) Agreement <input type="checkbox"/> Linking # _____ <input type="checkbox"/> Marana Original Agreement <input type="checkbox"/> Amendment/Addendum <input type="checkbox"/> Task Order <input type="checkbox"/> Change Order		<input type="checkbox"/> Extension of Agreement <input type="checkbox"/> Extension No. _____ <input type="checkbox"/> No. _____ of _____	
		AgreeDB # <small>(when parent agreement is in AgreeDB)</small>	
Type of Agreement: <small>(Only Select 1. See IV Below)</small>			
<input type="checkbox"/> 005 General Services	<input type="checkbox"/> 010 Professional/Tech	<input type="checkbox"/> 015 Supplies/Equipment	<input type="checkbox"/> 020 Construction / C.I.P.
<input type="checkbox"/> 025 Government Related	<input type="checkbox"/> 030 Lease Agreement	<input type="checkbox"/> 035 Property Related	<input type="checkbox"/> 040 Development Related
<input type="checkbox"/> 045 Utilities/Water	<input type="checkbox"/> 050 Other		

(AGREEDB)

New Agreement

General Info

Title: _____ Agreement Type: 005 - General Services Archive?

Description: _____

Agreement Owner (employee)
Enter Employee Name: _____

Munis

Department: **--SELECT--**
 AIRPORT OPERATIONS - 9200
 BUILDING SAFETY - 2200
 CIP ENGINEERING DIVISION - 4300
 COMMUNITY & NEIGHBORHOOD SERVICES - 6100
 ECONOMIC & TOURISM DEVELOPMENT - 1800
 ENGINEERING - 2400
 FINANCE - 1500
 HUMAN RESOURCES - 1400
 LEGAL - 1600
 MAGISTRATE COURT - 3200
 MAYOR COUNCIL - 1100
 NON-DEPARTMENTAL - 0000
 PARKS & RECREATION - 5100
 PLANNING - 2300
 POLICE - 3100
 PUBLIC WORKS - 4100
 RECORDS CENTER - 2100
 TECHNOLOGY SERVICES - 1700
 TOWN CLERK - 1300

Munis Project: Enter Project Name / Number: _____ Vendor: Enter Vendor Name / Number: _____

Resolution # _____ Vendor / Ext Contact: Enter existing contact Add New

End Date: mm/dd/yyyy


Cancel Create

- Vendor Agency Information
 - This is to identify a vendor that we are working with on the agreement.
 - Munis Vendor #
 - Vendors do have a money transaction with the Town of Marana and will have a Munis vendor #.
 - If a vendor number is not available follow-up with Finance Department's internal procedures.
 - Name of Organization Section

- This is to identify the specific vendor that we are working with on the agreement.
- The Munis Vendor # and Name of Organization are in one fillable format in AgreeDB, which combines these to items and both are searchable.

(AGREEMENTS TRANSMITTAL FORM)

AgreeDB Assigned No:	
AgendaQuick Item No:	
Finance Staff Initial:	
Rec'd Date/Staff Initial:	



MARANA AZ
AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

I. Basic Agreement Information

Agreement Title (See IV Below)		Calendar Year	
Fiscal Year	Staff Name	Department No. (See IV Below)	Department
TOM Generating	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Information	Name of Contact	Phone Number	Email
Vendor/Outside Agency Contact Information	Agreement Start Date	Expiration of Agreement	
Munis Project Name	Munis Project Number		
Vendor/Outside Agency Project No.			

Type of Document		Extension of Agreement	
<input type="checkbox"/> Cooperative (Linking) Agreement <input type="checkbox"/> Linking #: _____ <input type="checkbox"/> Marana Original Agreement <input type="checkbox"/> Amendment/Addendum <input type="checkbox"/> Task Order <input type="checkbox"/> Change Order		<input type="checkbox"/> Extension of Agreement <input type="checkbox"/> Extension No. _____ <input type="checkbox"/> No. ____ of ____	
AgreeDB # _____ <small>(when parent agreement is in AgreeDB)</small>			

Type of Agreement: (Only Select 1 - See IV Below)			
<input type="checkbox"/> 005 General Services	<input type="checkbox"/> 010 Professional/Tech	<input type="checkbox"/> 015 Supplies/Equipment	<input type="checkbox"/> 020 Construction / C.I.P.
<input type="checkbox"/> 025 Government Related	<input type="checkbox"/> 030 Lease Agreement	<input type="checkbox"/> 035 Property Related	<input type="checkbox"/> 040 Development Related
<input type="checkbox"/> 045 Utilities/Water	<input type="checkbox"/> 050 Other		

(AGREEDB)

New Agreement

General Info

Title:

Agreement Type: 005 - General Services Archive?

Description:

Agreement Owner (Employee):

Munis

Department: -- SELECT -- Munis Project:

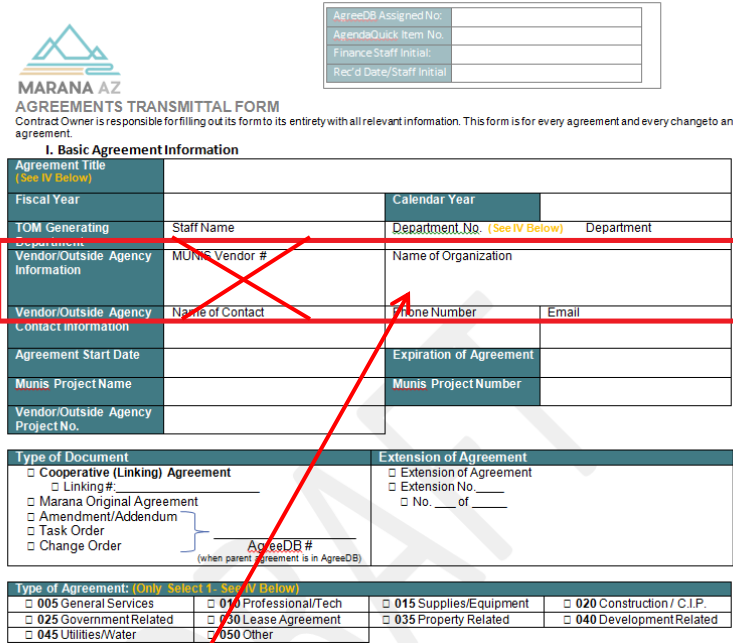
Vendor: PIMA

FY End	Outside Agency #	Status	Resolution #	Vendor / Ext Co	PIMA COUNTY SHERIFFS DEPT - 1051
<input type="text"/>	<input type="text"/>	Active	<input type="text"/>	<input type="text"/>	PIMA COUNTY FLEET SVS DEPT - 1058
Effective Dates					PIMA COUNTY DEPARTMENT OF - 1109
Start Date	End Date			PIMA COUNTY DEVELOPMENT - 1121	
<input type="text"/>	<input type="text"/>			CLERK OF THE PIMA COUNTY SUPERIOR - 1146	
Notes					PIMA COUNTY DIV OF ELECTIONS - 1156
<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>					PIMA COUNTY RECORDERS OFFICE - 1194
					PIMA COUNTY TREASURER, FIRST FLOOR - 1201

- Outside Agency Information

- Name of Organization Section
 - This is to identify an outside agency that we are working with on the agreement.
 - Outside agencies do not have a money transaction with the Town of Marana and do not have vendor #s in the system.

(AGREEMENTS TRANSMITTAL FORM)



MARANA AZ
AGREEMENTS TRANSMITTAL FORM
 Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

I. Basic Agreement Information

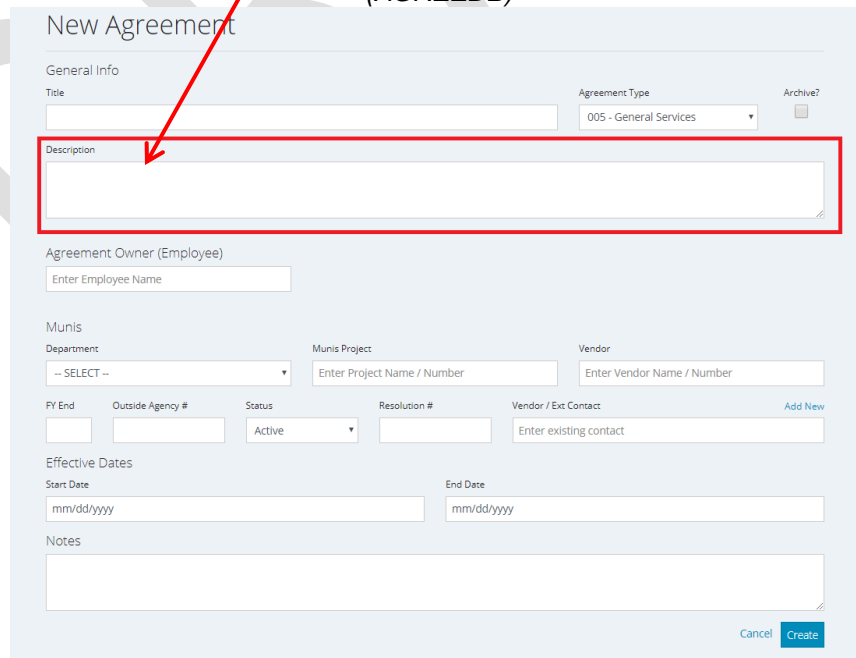
Agreement Title (See IV Below)			
Fiscal Year	Staff Name	Calendar Year	Department
TOM Generating Department	MUNIS Vendor #	Department No. (See IV Below)	Department
Vendor/Outside Agency Information	Name of Contact	Name of Organization	
Vendor/Outside Agency Contact Information	Phone Number	Email	
Agreement Start Date	Expiration of Agreement		
Munis Project Name	Munis Project Number		
Vendor/Outside Agency Project No.			

<input type="checkbox"/> Cooperative (Linking) Agreement <input type="checkbox"/> Linking # _____ <input type="checkbox"/> Marana Original Agreement <input type="checkbox"/> Amendment/Addendum <input type="checkbox"/> Task Order <input type="checkbox"/> Change Order	<input type="checkbox"/> Extension of Agreement <input type="checkbox"/> Extension No. _____ <input type="checkbox"/> No. ___ of ___
---	--

AgreeDB # _____
 (when parent agreement is in AgreeDB)

Type of Agreement: (Only Select 1. See IV Below)			
<input type="checkbox"/> 005 General Services	<input type="checkbox"/> 010 Professional/Tech	<input type="checkbox"/> 015 Supplies/Equipment	<input type="checkbox"/> 020 Construction / C.I.P.
<input type="checkbox"/> 025 Government Related	<input type="checkbox"/> 030 Lease Agreement	<input type="checkbox"/> 035 Property Related	<input type="checkbox"/> 040 Development Related
<input type="checkbox"/> 045 Utilities/Water	<input type="checkbox"/> 050 Other		

(AGREEDB)



New Agreement

General Info

Title: _____ Agreement Type: 005 - General Services Archive?

Description: _____

Agreement Owner (Employee)
 Enter Employee Name: _____

Munis

Department: -- SELECT -- Munis Project: Enter Project Name / Number Vendor: Enter Vendor Name / Number

FY End: _____ Outside Agency #: _____ Status: Active Resolution #: _____ Vendor / Ext Contact: Enter existing contact Add New

Effective Dates
 Start Date: mm/dd/yyyy End Date: mm/dd/yyyy

Notes: _____

Cancel Create

- Vendor Contact Information

- Name of Contact, Phone Number, Email
 - This is to have contact information readily available.
 - You must click “Add New” in AgreeDB then it will pop up a window with fillable details.

(AGREEMENTS TRANSMITTAL FORM)



AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

I. Basic Agreement Information

Agreement Title <small>(See IV Below)</small>			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Department No. <small>(See IV Below)</small>	Department
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor/Outside Agency Project No.			

AgreeDB Assigned No.:	
AgendaQuick Item No.:	
Finance Staff Initial:	
Rec'd Date/Staff Initial:	

(AGREEDB)

New Agreement

General Info

Title: Agreement Type: 005 - General Services Archive?

Description:

Agreement Owner (Employee)

Enter Employee Name:

Munis

Department: -- SELECT -- Munis Project: Enter Project Name / Number Vendor: Enter Vendor Name / Number

FY End: Outside Agency #: Status: Active Resolution #: Vendor / Ext Contact: Add New

Effective Dates

Start Date: mm/dd/yyyy End Date: mm/dd/yyyy

Notes:

Cancel Create

(AGREEMENTS TRANSMITTAL FORM)



AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

AgreeDB Assigned No:	
AgendaQuick Item No.	
Finance Staff Initial:	
Rec'd Date/Staff Initial	

I. Basic Agreement Information

Agreement Title (See IV Below)			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Department No. (See IV Below)	Department
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor/Outside Agency Project No.			

(AGREEDB)

The screenshot shows the 'Add Contact' modal in the AgreeDB system. The modal contains the following fields: First Name, Last Name, Phone, Fax, and Email. Red arrows from the Transmittal Form above point to these fields, indicating that the contact information entered in the form is used to create a contact record in the system.

- Agreement Start Date and Expiration Date
 - Within the Agreements Transmittal form the effective dates are called “Agreement Start Date” and “Expiration of Agreement.”
 - Within AgreeDB there is a section called “Effective Dates” with a “start date” and “end date”

(AGREEMENTS TRANSMITTAL FORM)



AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

AgreeDB Assigned No:	
AgendaQuick Item No.	
Finance Staff Initial:	
Rec'd Date/Staff Initial	

I. Basic Agreement Information

Agreement Title (See IV Below)			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Department No. (See IV Below)	Department
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor/Outside Agency Project No.			

(AGREEDB)

New Agreement

General Info

Title Agreement Type Archive?

Description

Agreement Owner (Employee)

Munis

Department Munis Project Vendor

FY End Outside Agency # Status Resolution # Vendor / Ext Contact [Add New](#)

Effective Dates

Start Date End Date

Notes

[Cancel](#) [Create](#)

- If the agreement start date is older than 2019 then mark the archive box in AgreeDB, this will change the auto-generated number convention, based on year to 99- for the agreement

- This is absolutely necessary to distinguish current agreements from older ones.
- Not compiling will cause permeant issues in the numbering sequence.

New Agreement

General Info

Title

Agreement Type Archive?

Description

Agreement Owner (Employee)

Munis

Department

Munis Project

Vendor

FY End

Outside Agency #

Status

Resolution #

Vendor / Ext Contact [Add New](#)

Effective Dates

Start Date

End Date

Notes

[Cancel](#) [Create](#)

- Munis Project Name and Munis Project Number
 - The Munis Project Name and The Munis Project Number are in one fillable format in AgreeDB, which combines these to items and both are searchable.

(AGREEMENTS TRANSMITTAL FORM)



AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

AgreeDB Assigned No:	
AgendaQuick Item No.	
Finance Staff Initial:	
Rec'd Date/Staff Initial	

I. Basic Agreement Information

Agreement Title (See IV Below)			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Department No. (See IV Below)	Department
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor/Outside Agency Project No.			

(AGREEDB)

New Agreement

General Info

Title Agreement Type Archive?

Description

Agreement Owner (Employee)

Enter Employee Name

Munis

Department

FY End Outside Agency # Status

Effective Dates

Start Date

Notes

Munis Project

- FEMA GRANT - AD008
- BLM GRANT - AD009
- 2016 TABY PAG GRANT - AD011
- ADEM HAZMAT WORKSHOP GRANT - AD012
- EMPG Grant - AD014
- CDBG GRANT 2007 - CB001
- CDBG GRANT 2008 - CB002
- CDBG GRANT 2009 - CB003
- CDBG GRANT 2010 - CB004

Vendor

Next Contact Add New

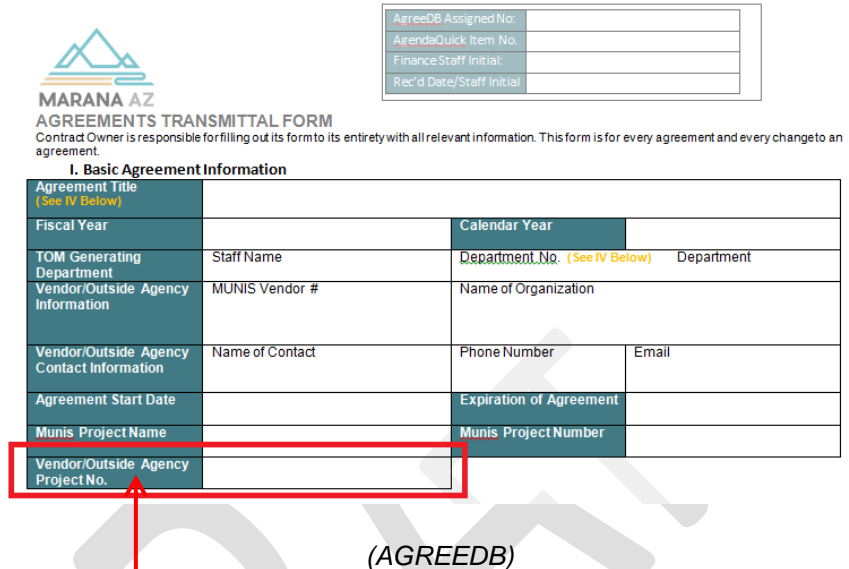
Existing Contact

Cancel Create

- Vendor/Outside Agency Project Number
 - If the vendor or outside agency has their own internal project number for the agreement there is a spot to enter it.

- Linking # and project number can be different depending on the type of agreement
 - Cooperative (Linking) Agreement's Linking # is referencing the outside referenced agreement's document number.
 - Vendor/Outside Agency's number is in reference to their internal project number for the project.

(AGREEMENTS TRANSMITTAL FORM)

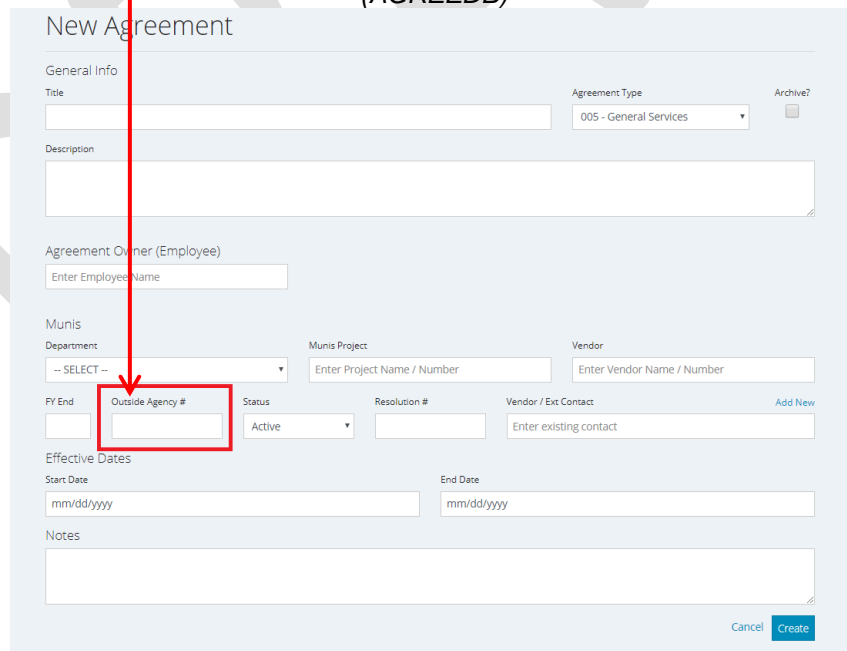


MARANA AZ
 AGREEMENTS TRANSMITTAL FORM
 Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

I. Basic Agreement Information

Agreement Title (See IV Below)			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Department No. (See IV Below)	Department
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor/Outside Agency Project No.			

(AGREEDB)



New Agreement

General Info

Title: Agreement Type: 005 - General Services Archive?:

Description:

Agreement Owner (Employee):

Munis

Department: -- SELECT -- Munis Project: Vendor:

FY End: Outside Agency #: Status: Active Resolution #: Vendor / Ext Contact: Add New

Effective Dates

Start Date: End Date:

Notes:

Cancel Create

Supplementary Documents, Extension of Agreement, and Tasks:

- How to get to the Supplement and Tasks section
 - In the “Navigating AgreeDB” section and “Document” Type has instructions to opening the supplementary document option.

- Add Supplement Details
 - The AgreeDB# allows the user to quickly find the “parent” agreement for the supplementary document.
 - Once “edit” has been clicked for the Supplementary details in the parent agreement a window will pop up asking for the type of supplementary document it is. This can be found on the Agreements Transmittal Form.

(AGREEMENTS TRANSMITTAL FORM)



AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

I. Basic Agreement Information

Agreement Title (See IV Below)			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Department No. (See IV Below)	Department
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date	Expiration of Agreement		
Munis Project Name	Munis Project Number		
Vendor/Outside Agency Project No.			

AgreeDB Assigned No.	
Agenda/Quick Item No.	
Finance Staff Initial:	
Rec'd Date/Staff Initial	

Type of Document <input type="checkbox"/> Cooperative (Linking) Agreement <input type="checkbox"/> Linking #: _____ <input type="checkbox"/> Marana Original Agreement <input type="checkbox"/> Amendment/Addendum <input type="checkbox"/> Task Order <input type="checkbox"/> Change Order	Extension of Agreement <input type="checkbox"/> Extension of Agreement <input type="checkbox"/> Extension No. _____ <input type="checkbox"/> No. ____ of ____
AgreeDB # _____ <small>(when parent agreement is in AgreeDB)</small>	

Type of Agreement: (Only Select 1 - See IV Below)			
<input type="checkbox"/> 005 General Services	<input type="checkbox"/> 010 Professional/Tech	<input type="checkbox"/> 015 Supplies/Equipment	<input type="checkbox"/> 020 Construction / C.I.P.
<input type="checkbox"/> 025 Government Related	<input type="checkbox"/> 030 Lease Agreement	<input type="checkbox"/> 035 Property Related	<input type="checkbox"/> 040 Development Related
<input type="checkbox"/> 045 Utilities/Water	<input type="checkbox"/> 050 Other		

(AGREEDB)

- The Agreement Type, Owner, and Munis information will automatically transfer to the supplementary document.
- Treat the Agreements Transmittal Form and AgreeDB in the same manner, under “New Supplement” section.

(AGREEDB)

New Supplement

General Info

Title Agreement Type **005 - General Services** Archive?

Description

Agreement Owner (Employee) **Andrea Sirois**

Munis

Department: TOWN MANAGER - 1200 Munis Project: WATER RECLAMATION FACILITY STUDY Vendor: BORDERLAND CONSTRUCTION CO INC

FY End: 19 Outside Agency #: #81807 Status: Active Resolution #: Vendor / Ext Contact: Clint Elder [Add New](#)

Effective Dates

Start Date: End Date:

Notes

Cancel [Create](#)

- Extension of Agreement
 - In most events an extension of agreement will be in the form of an addendum or agreement. If this section is filled out on the transmittal then enter it into the notes section.

(AGREEMENTS TRANSMITTAL FORM)



AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

AgreeDB Assigned No.:	
AgreeDB Item No.:	
Finance Staff Initial:	
Rec'd Date/Staff Initial:	

I. Basic Agreement Information

Agreement Title <small>(See IV Below)</small>			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Department No. <small>(See IV Below)</small>	Department
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor/Outside Agency Project No.			

Type of Document <input type="checkbox"/> Cooperative (Linking) Agreement <input type="checkbox"/> Linking #: _____ <input type="checkbox"/> Marana Original Agreement <input type="checkbox"/> Amendment/Addendum <input type="checkbox"/> Task Order <input type="checkbox"/> Change Order AgreeDB # _____ <small>(when parent agreement is in AgreeDB)</small>	Extension of Agreement <input type="checkbox"/> Extension of Agreement <input type="checkbox"/> Extension No. _____ <input type="checkbox"/> No. _____ of _____
---	---

Type of Agreement: (Only Select 1 - See IV Below)			
<input type="checkbox"/> 005 General Services	<input type="checkbox"/> 010 Professional/Tech	<input type="checkbox"/> 015 Supplies/Equipment	<input type="checkbox"/> 020 Construction / C.I.P.
<input type="checkbox"/> 025 Government Related	<input type="checkbox"/> 030 Lease Agreement	<input type="checkbox"/> 035 Property Related	<input type="checkbox"/> 040 Development Related
<input type="checkbox"/> 045 Utilities/Water	<input type="checkbox"/> 050 Other		

(AGREEDB)

New Agreement

General Info

Title: Agreement Type: Archive?:

Description:

Agreement Owner (Employee)

Enter Employee Name:

Munis

Department: Munis Project: Vendor:

FY End: Outside Agency #: Status: Resolution #: Vendor / Ext Contact: [Add New](#)

Effective Dates

Start Date: End Date:

Notes:

[Cancel](#) [Create](#)

- Add Task Details
 - “Navigating AgreeDB” section has more details to get to the Task section, but once the Agreement Landing page is created for an agreement than the user can scroll to the bottom and click on “edit” under tasks.

- Task details ensure agreement compliance by giving agreement owners notifications when an action is due.
- Task information to add to AgreeDB is separated into sections on the Agreements Transmittal Form by task type.
 - Task Types: General Compliance, Agreement Payment Terms, Notice to Proceed, Bond Updates, Certificates of Insurance, and Agreement Renewal.
 - There might be an additional document attached if there are multiple action items for one task type.

(AGREEMENTS TRANSMITTAL FORM)

I. AgreeDB Task and Notification Section
 Please attach brief and additional doc if there is not enough space within the note section or there are multiples of the same task type.

Quality Control Assurance Section		
General Compliance <input type="checkbox"/> Debt Issuance <input type="checkbox"/> Due Date <input type="checkbox"/> Report <input type="checkbox"/> Due Date <input type="checkbox"/> Other (describe in note section) <input type="checkbox"/> Due Date	Instruction/Notes <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Payment Terms <input type="checkbox"/> Payment Terms <input type="checkbox"/> No. of Payment Terms <input type="checkbox"/> Amt. Due <input type="checkbox"/> Due Date	Instruction/Notes <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Notice to Proceed <input type="checkbox"/> Notice to Proceed <input type="checkbox"/> Due Date: _____	Instruction/Notes <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Bond Updates <input type="checkbox"/> Updates to Bond <input type="checkbox"/> Bond Expiration Date: _____	Instruction/Notes <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Certificate of Insurance <input type="checkbox"/> Certification of Insurance <input type="checkbox"/> Due Date <input type="checkbox"/> No. of Insurance Coverages <input type="checkbox"/> Insurance Co Info.	Instructions/Notes <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Renewal <input type="checkbox"/> Agreement Renewal <input type="checkbox"/> Deadline: _____	Instruction/Notes <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice

(AGREEDB)

General Info

Title: JOC for Water Production Facilities

Description: Cooperative (Linking) Agreement #181807

Department: TOWN MANAGER - 1200

PY End: 19 Outside Agency #: #81807

Vendor / Ext Contact: Clint Elder

Effective Dates: Start Date: 06/10/2019

Notes: as needed services

Supplemental Documents: Add New

Add Task

Task Type: --- SELECT ---

Description: _____

Due Date: mm/dd/yyyy

Notifications (Days): 30 60 90 120

Notes: _____

Assignee: _____

Assignee Email: _____

Item Type: General Services

BERLAND CONSTRUCTION CO INC

- Task Example
 - Entering Tasks will universally be the same for every task.
 - Find task type on the Agreements Transmittal Sheet and Select it within AgreeDB
 - If a task type remains empty on the Agreements Transmittal Sheet then do not enter anything into AgreeDB.

(AGREEMENTS TRANSMITTAL FORM)

I. AgreeDB Task and Notification Section
Please attach brief and additional doc if there is not enough space within the note section or there are multiples of the same task type.

Quality Control Assurance Section		
General Compliance	Instruction/Notes	Notification Preference
<input type="checkbox"/> Debt Issuance <input type="checkbox"/> Due Date _____ <input type="checkbox"/> Report _____ <input type="checkbox"/> Due Date _____ <input type="checkbox"/> Other (describe in note section) _____ <input type="checkbox"/> Due Date _____	_____ _____ _____ _____	<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Payment Terms	Instruction/Notes	Notification Preference
<input type="checkbox"/> Payment Terms <input type="checkbox"/> No. of Payment Terms _____ <input type="checkbox"/> Amt. Due _____ <input type="checkbox"/> Due Date _____	_____ _____ _____ _____	<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Notice to Proceed	Instruction/Notes	Notification Preference
<input type="checkbox"/> Notice to Proceed <input type="checkbox"/> Due Date _____	_____ _____ _____ _____	<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Bond Updates	Instruction/Notes	Notification Preference
<input type="checkbox"/> Updates to Bond <input type="checkbox"/> Bond Expiration Date _____	_____ _____ _____ _____	<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Certificate of Insurance	Instruction/Notes	Notification Preference
<input type="checkbox"/> Certification of Insurance <input type="checkbox"/> Due Date _____ <input type="checkbox"/> No. of Insurance Coverages _____ <input type="checkbox"/> Insurance Co Info. _____	_____ _____ _____ _____	<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Renewal	Instruction/Notes	Notification Preference
<input type="checkbox"/> Agreement Renewal <input type="checkbox"/> Deadline _____	_____ _____ _____ _____	<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice

(AGREEDB)

General Info

Title: JOC for Water Production Facilities

Description: Cooperative (Linking) Agreement #181807

Department: TOWN MANAGER - 1200

FY End: 19 Outside Agency #: #181807

Vendor / Ext Contact: Clint Elder

Effective Dates: Start Date 06/10/2019

Notes: as needed services

Supplemental Documents: Add New

Tasks: Add New

Task	Assignee	Due	Done?

Add Task

Task Type

--- SELECT ---

--- SELECT ---

General Compliance

Payment Terms

Notice To Proceed

Updating A Bond

Certificates Of Insurance

Renewal

Other

Notification(s) (Day(s))

30 60 90 120

Notes

Assignee

Assignee Email

Add Task Cancel

- Every task needs a due date/deadline in order for notifications to function properly. This can be found in each task type within the first column of the Agreements Transmittal Form. It gets add to the due date option within the AgreeDB Task pop-up.

(AGREEMENTS TRANSMITTAL FORM)

I. AgreeDB Task and Notification Section
 Please attach brief and additional doc if there is not enough space within the note section or there are multiples of the same task type.

Quality Control Assurance Section		
General Compliance	Instruction/Notes	Notification Preference
<input type="checkbox"/> Debt Issuance <input type="checkbox"/> Due Date _____ <input type="checkbox"/> Report <input type="checkbox"/> Due Date _____ <input type="checkbox"/> Other (describe in note section) <input type="checkbox"/> Due Date _____	_____ _____ _____ _____ _____	<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Payment Terms	Instruction/Notes	Notification Preference
<input type="checkbox"/> Payment Terms <input type="checkbox"/> No. of Payment Terms _____ <input type="checkbox"/> Amt. Due _____ <input type="checkbox"/> Due Date _____	_____ _____ _____ _____	<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Notice to Proceed	Instruction/Notes	Notification Preference
<input type="checkbox"/> Notice to Proceed <input type="checkbox"/> Due Date: _____	_____ _____ _____	<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Bond Updates	Instruction/Notes	Notification Preference
<input type="checkbox"/> Updates to Bond <input type="checkbox"/> Bond Expiration Date: _____	_____ _____ _____	<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Certificate of Insurance	Instructions/Notes	Notification Preference
<input type="checkbox"/> Certification of Insurance <input type="checkbox"/> Due Date: _____ <input type="checkbox"/> No. of Insurance Coverages: _____ <input type="checkbox"/> Insurance Co Info. _____	_____ _____ _____	<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Renewal	Instruction/Notes	Notification Preference
<input type="checkbox"/> Agreement Renewal <input type="checkbox"/> Deadline: _____	_____ _____ _____	<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice

(AGREEDB)

The screenshot shows the 'Add Task' pop-up window in the AgreeDB system. The window has a title bar with 'Add Task' and a close button. It contains several input fields: 'Task Type' (a dropdown menu), 'Description' (a text area), 'Due Date' (a text field with a red box around it containing 'mm/dd/yyyy'), 'Notifications (Days)' (radio buttons for 30, 60, 90, and 120), 'Notes' (a text area), 'Assignee' (a text field), and 'Assignee Email' (a text field). At the bottom right, there are 'Add Task' and 'Cancel' buttons. The background shows a form with various fields like 'Title', 'Description', 'Department', 'FY End', 'Outside Agency #', 'Vendor / Ext Contact', 'Client/Elder', 'Effective Dates', 'Start Date', 'Notes', and 'Supplemental Documents'.

- If the note section with the Agreements Transmittal states there is a different assignee then enter them into the “Assignee” section of AgreeDB and their email will also populate. If there is no indication that there is a different assignee then it should fall upon the agreement owner. Their name and email needs to be populated in order to properly send out notifications.

(AGREEMENTS TRANSMITTAL FORM)

I. AgreeDB Task and Notification Section
Please attach brief and additional doc if there is not enough space within the note section or there are multiples of the same task type.

Quality Control Assurance Section		
General Compliance <input type="checkbox"/> Debt Issuance <input type="checkbox"/> Due Date <input type="checkbox"/> Report <input type="checkbox"/> Due Date <input type="checkbox"/> Other (describe in note section) <input type="checkbox"/> Due Date	Instruction/Notes <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Notification Reference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Payment Terms <input type="checkbox"/> Payment Terms <input type="checkbox"/> No. of Payment Terms <input type="checkbox"/> Amt. Due <input type="checkbox"/> Due Date	Instruction/Notes <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Notification Reference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Notice to Proceed <input type="checkbox"/> Notice to Proceed <input type="checkbox"/> Due Date: _____	Instruction/Notes <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Notification Reference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Bond Updates <input type="checkbox"/> Updates to Bond <input type="checkbox"/> Bond Expiration Date: _____	Instruction/Notes <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Notification Reference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Certificate of Insurance <input type="checkbox"/> Certification of Insurance <input type="checkbox"/> Due Date: _____ <input type="checkbox"/> No. of Insurance Coverages: _____ <input type="checkbox"/> Insurance Co Info: _____	Instructions/Notes <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Notification Reference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Renewal <input type="checkbox"/> Agreement Renewal <input type="checkbox"/> Deadline: _____	Instruction/Notes <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Notification Reference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice

(AGREEDB)

The screenshot shows the 'Add Task' dialog in the AgreeDB system. The dialog includes the following fields:

- Task Type: -- SELECT --
- Description: [Text Field]
- Due Date: mm/dd/yyyy
- Notifications (Days): 30 60 90 120
- Notes: [Text Area]
- Assignee: [Text Field]
- Assignee Email: [Text Field]

 The 'Assignee' and 'Assignee Email' fields are highlighted with a red box. A red arrow points from the 'Assignee' field in the dialog to the 'Instruction/Notes' section of the 'AGREEMENTS TRANSMITTAL FORM' above.

- Other information outside of Agreement Type, Due Date and Task Assignee in the first two quality assurance sections (column 1 and column 2) of the Agreements Transmittal Form goes into the AgreeDB Note Section.

(AGREEMENTS TRANSMITTAL FORM)

I. AgreeDB Task and Notification Section
 Please attach brief and additional doc if there is not enough space within the note section or there are multiples of the same task type.

Quality Control Assurance Section		
General Compliance <input type="checkbox"/> Debt Issuance <input type="checkbox"/> Due Date _____ <input type="checkbox"/> Report <input type="checkbox"/> Due Date _____ <input type="checkbox"/> Other (describe in note section) <input type="checkbox"/> Due Date _____	Instruction/Notes _____ _____ _____ _____	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Payment Terms <input type="checkbox"/> Payment Terms <input type="checkbox"/> No. of Payment Terms _____ <input type="checkbox"/> Amt. Due _____ <input type="checkbox"/> Due Date _____	Instruction/Notes _____ _____ _____	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Notice to Proceed <input type="checkbox"/> Notice to Proceed <input type="checkbox"/> Due Date: _____	Instruction/Notes _____ _____ _____	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Bond Updates <input type="checkbox"/> Updates to Bond <input type="checkbox"/> Bond Expiration Date: _____	Instruction/Notes _____ _____ _____	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Certificate of Insurance <input type="checkbox"/> Certification of Insurance <input type="checkbox"/> Due Date: _____ <input type="checkbox"/> No. of Insurance Coverages: _____ <input type="checkbox"/> Insurance Co Info. _____	Instructions/Notes _____ _____ _____	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Renewal <input type="checkbox"/> Agreement Renewal <input type="checkbox"/> Deadline: _____	Instruction/Notes _____ _____ _____	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice

(AGREEDB)

The screenshot shows the 'Add Task' modal in the AgreeDB system. The 'Notes' field is highlighted with a red box. An arrow points from this field to the 'General Compliance' section of the 'AGREEMENTS TRANSMITTAL FORM' above. The modal includes fields for Task Type, Description, Due Date, Notifications (Days), Assignee, and Assignee Email. The background shows a task card for 'JOC for Water Production Facilities'.

- If there is task information then notification boxes should be checked within the Agreements Transmittal Form. Those selected boxes then should be “checked” within the AgreeDB system.

(AGREEMENTS TRANSMITTAL FORM)

I. AgreeDB Task and Notification Section
 Please attach brief and additional doc if there is not enough space within the note section or there are multiples of the same task type.

Quality Control Assurance Section		
General Compliance <input type="checkbox"/> Debt Issuance <input type="checkbox"/> Due Date _____ <input type="checkbox"/> Report <input type="checkbox"/> Due Date _____ <input type="checkbox"/> Other (describe in note section) <input type="checkbox"/> Due Date _____	Instruction/Notes _____ _____ _____ _____	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Payment Terms <input type="checkbox"/> Payment Terms <input type="checkbox"/> No. of Payment Terms _____ <input type="checkbox"/> Amt. Due _____ <input type="checkbox"/> Due Date _____	Instruction/Notes _____ _____ _____ _____	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Notice to Proceed <input type="checkbox"/> Notice to Proceed <input type="checkbox"/> Due Date _____	Instruction/Notes _____ _____ _____ _____	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Bond Updates <input type="checkbox"/> Updates to Bond <input type="checkbox"/> Bond Expiration Date: _____	Instruction/Notes _____ _____ _____ _____	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Certificate of Insurance <input type="checkbox"/> Certification of Insurance <input type="checkbox"/> Due Date _____ <input type="checkbox"/> No. of Insurance Coverages: _____ <input type="checkbox"/> Insurance Co Info: _____	Instructions/Notes _____ _____ _____ _____	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Renewal <input type="checkbox"/> Agreement Renewal <input type="checkbox"/> Deadline: _____	Instruction/Notes _____ _____ _____ _____	Notification Preference <input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice

(AGREEDB)

The screenshot shows the 'Add Task' modal in the AgreeDB system. A red arrow originates from the 'Notifications (Days)' section of the modal, which contains radio buttons for 30, 60, 90, and 120 days. This arrow points to the 'Notification Preference' column of the 'AGREEMENTS TRANSMITTAL FORM' shown in the previous block, indicating that the selection in the modal should correspond to the checked box in the form.

- Mark “Task” as complete
 - Once an email has been received that a task has been completed by the agreement owner or task assignee then AgreeDB should be updated to reflect it.
 - Notifications will still be turned on regardless of AgreeDB being updated since those notifications have already been transferred to the individual’s outlook mail during the original creation of an agreement within AgreeDB. An individual can manually remove it from the calendar if desired.
 - Under “Update Agreement” on an agreement landing page, click “Edit” at the very top within AgreeDB.

(AGREEDB)

- Under “Tasks” there will be a “done?” section. This is where you would click to save it as being complete.

(AGREEDB)

Task	Assignee	Due	Done?
Other - Steve Miller sign off	Lacey Gastellum	9/27/2019	<input checked="" type="checkbox"/>
Updating A Bond - Lacey Sucks	Lacey Gastellum	10/7/2019	<input type="checkbox"/>
General Compliance - Test	Logan Garland	10/7/2019	<input type="checkbox"/>
Payment Terms - 30 day	Andrea Sirois	10/10/2019	<input checked="" type="checkbox"/>
General Compliance - Test	Logan Garland	11/27/2019	<input type="checkbox"/>
General Compliance - BLAH BLAH	Logan Garland	11/27/2019	<input type="checkbox"/>
Renewal - This needs renewed	Logan Garland	11/30/2019	<input type="checkbox"/>

- Once saved it will show the status of the task, completed ones will be grey with the completion date listed.

(AGREEDB)

Description	Due Date	Assignee	Completed
Renewal	9/20/2019	Logan Garland	10/2/2019
Payment Terms	11/1/2019	Logan Garland	No


AgreeDB Reports

- At the beginning of every month AgreeDB editors will receive two reports from the AgreeDB system: renewal report and task report.

(AgreeDB Renewal Report)

Home > Contracts App > On Demand Reports > AgreeDB_Renewals_Report

1 of 1 100% Find | Next



Agreement Renewals


Expired						
Department	Agreement Name	Renewal Date	Task Assignee	Munis Project #	Description & Agreement Notes	Agreement Owner
Upcoming						
Department	Agreement Name	Renewal Date	Task Assignee	Munis Project #	Description & Agreement Notes	Agreement Owner
PARKS & RECREATION	190003 - Parks & Recreation Master Plan MCGANN & ASSOCIATES	12/14/2019	Jim Conroy	PK028		Jim Conroy

Run Date: 10/30/2019 Page 1 of 1

(AgreeDB Task List Report)

Home > Contracts App > On Demand Reports > AgreeDB_Tasks_Report

1 of 1 100% Find | Next



AgreeDB Task List

Past Due					
Department Name	Agreement Name	Due Date	Task Type & Task Assignee	Agreement Owner	Task Description & Notes
Upcoming Tasks					
Department Name	Agreement Name	Due Date	Task Type & Task Assignee	Agreement Owner	Task Description & Notes
PARKS & RECREATION	190003 - Parks & Recreation Master Plan MCGANN & ASSOCIATES	12/14/2019	Certificates Of Insurance - Jim Conroy	Jim Conroy	

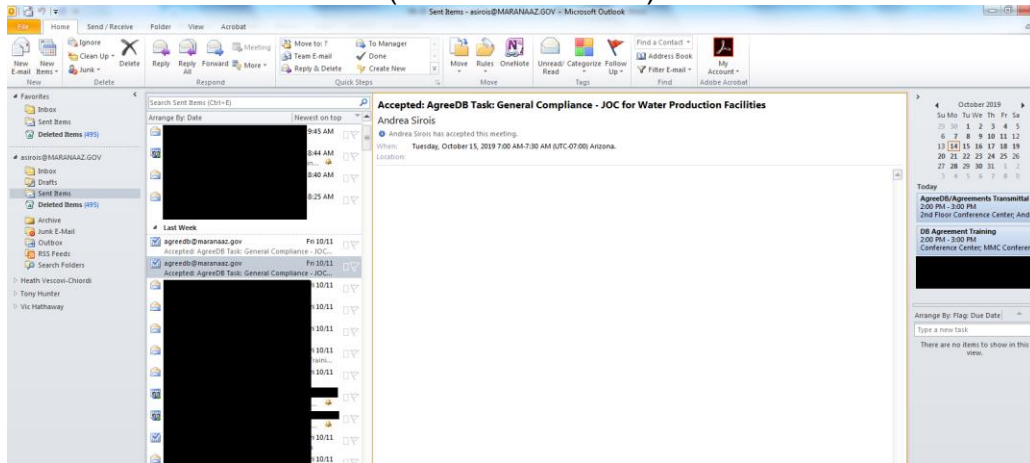
Run Date: 10/30/2019 Page 1 of 1

- These reports must be sent out to appropriate department heads, who will use them accordingly.
- These reports can also be accessed on demand through this webpage:
 - Renewals: http://tmsql05/Reports/Pages/Report.aspx?ItemPath=%2fContracts+App%2fOn+Demand+Reports%2fAgreeDB_Renewals_Report
 - Task Reports: http://tmsql05/Reports/Pages/Report.aspx?ItemPath=%2fContracts+App%2fOn+Demand+Reports%2fAgreeDB_Tasks_Report

AgreeDB Outlook Notifications

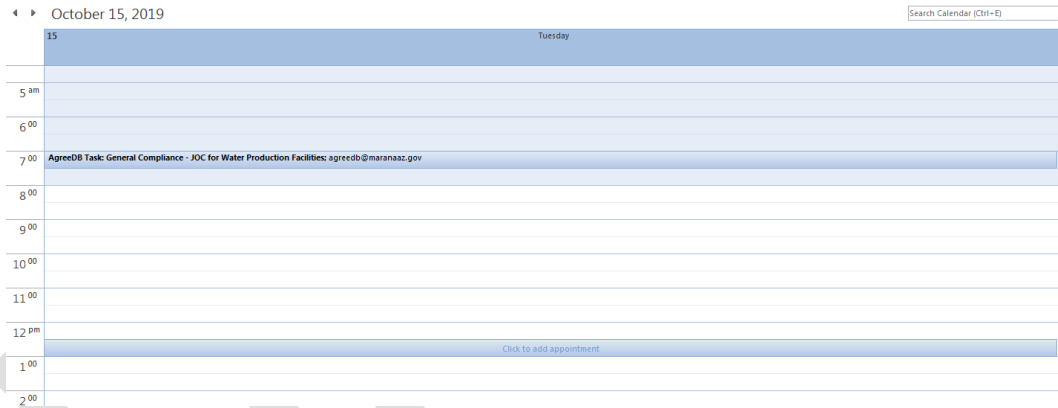
- Once tasks have been added to AgreeDB then the system will automatically send meeting invites for each task to the task assignee (not agreement owner if different).

(Outlook Calendar)



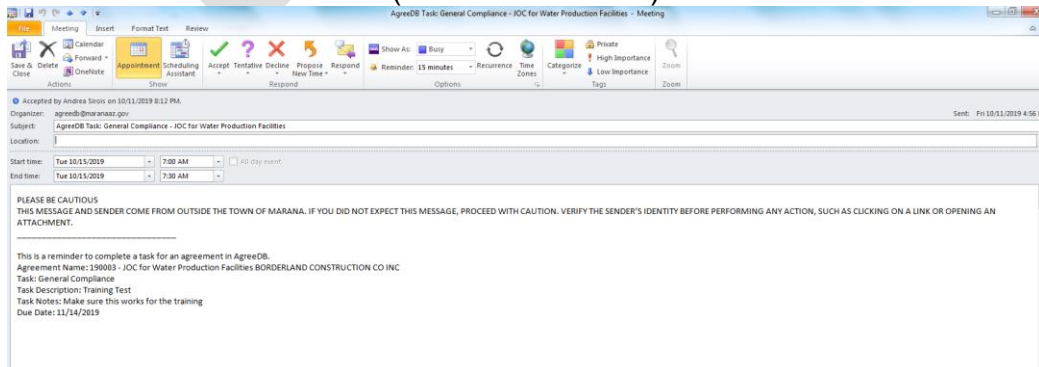
- The meeting invite will show as a 7am meeting on the day of each notification and deadline. It will state it is an AgreeDB task, the task type, and department title.

(Outlook Calendar)



- Task Assignees can access more information about the task by click on the meeting. This will show the notes they provided from the Agreements Transmittal Form.

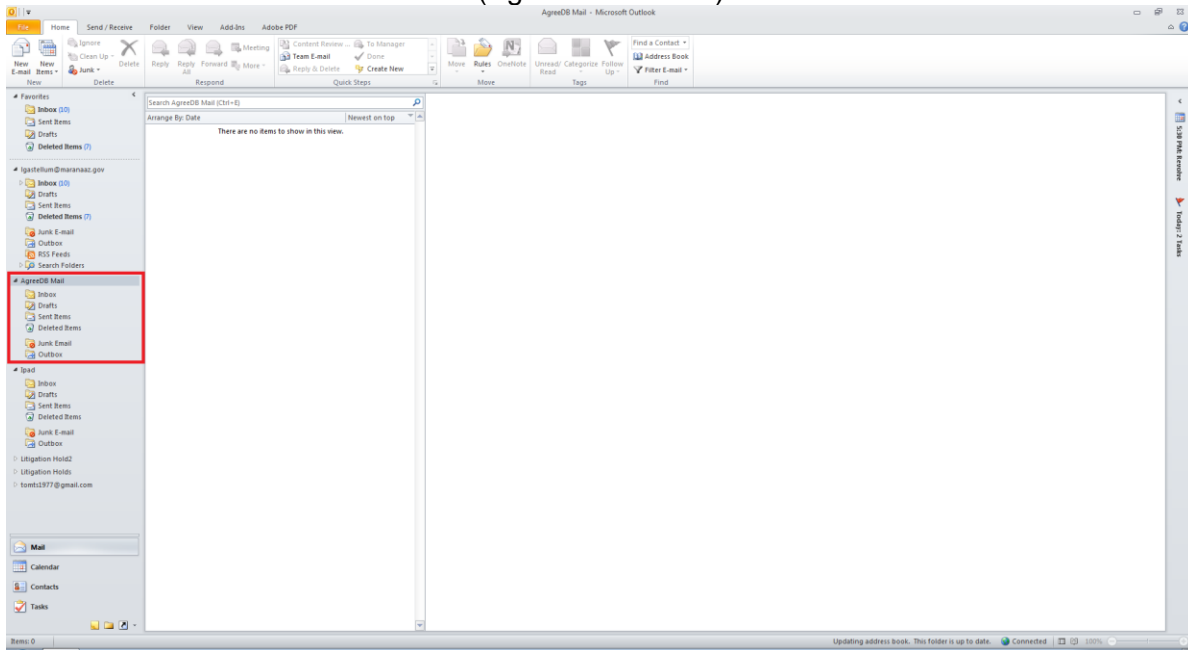
(Outlook Calendar)



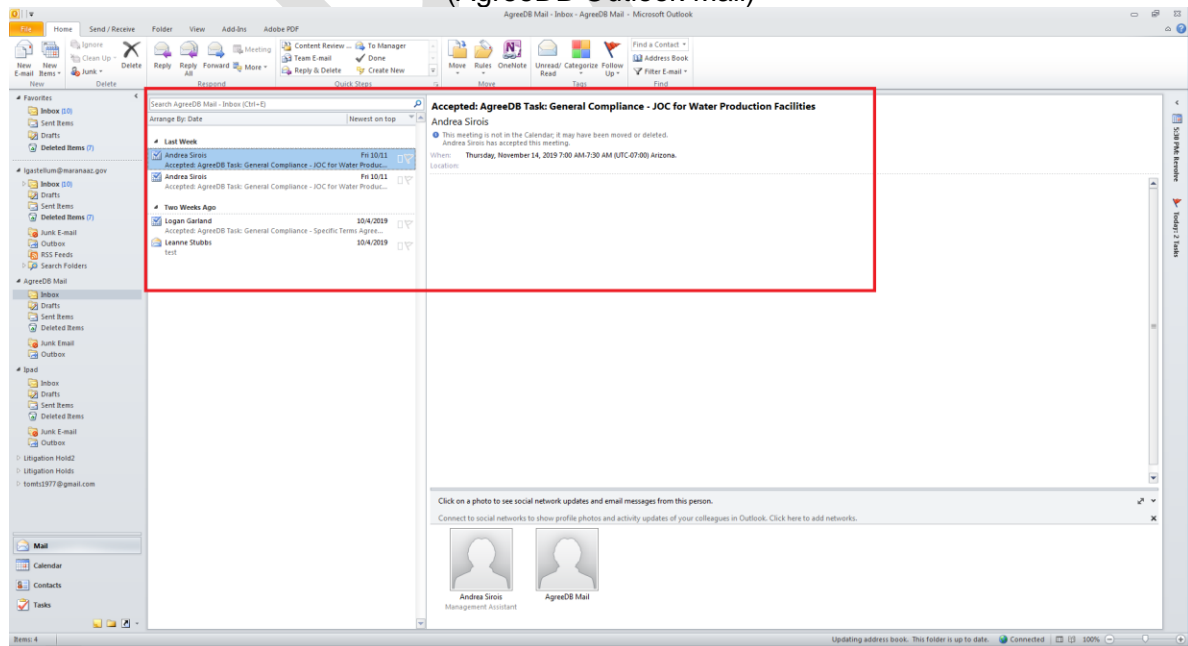
AgreeDB Calendar

- Editors will have access to an AgreeDB Email and Calendar. This will show all tasks that the AgreeDB system has dispersed. This can be used as a tool to ensure tasks were properly sent out if individuals have questions/concerns.

(AgreeDB Outlook)



(AgreeDB Outlook Mail)



(AgreeDB Outlook Mail)

