

Contract Request Form vs. Contract Creation in Coupa CLMS

Stage	Contract Request Form	Contract Creation (CLMS Authoring / Record Creation)
Purpose	Intake and approval to begin the contract process	Generation, redlining, negotiation, or formal execution of the contract
Who Initiates It	The requesting department / contract owner	Contract Management (Procurement) after request form approval*
When It Happens	First step in the process	After submission and internal approval of the request
What It Includes	Basic contract details and supporting documents (e.g., draft agreement, scope, quote, vendor info, risk considerations)	The actual contract record, which may include: • University-generated agreement (template) • Uploaded supplier contract • Redlines and negotiated terms • Approval and signature workflows
User Action Required	Complete form fields, upload documentation, and submit in Coupa	Usually review, provide feedback, or approve (users do not create CLMS contracts directly unless granted access)
Workflow Route	Routes for intake review and stakeholder approvals (Procurement, IT, Risk, Legal, etc.)	Routes through contract drafting, legal review, negotiation, and final signature
Outcome	Authorization for Contract Management to begin contract work	A negotiated and fully executed agreement stored in Coupa
System Location	Coupa → <i>Contract Management</i> → Contract Request Form	Coupa CLMS → Contract Record / Authoring Workspace
Status Tracking	Tracked in Contract Requests dashboard	Tracked in Contract Workspace / Contract Record
Key Question It Answers	“Can we begin a contract?”	“What does the final contract say and has it been signed?”