

SLU Contracts

Approval Team

User Guide

Last Updated: November 8, 2020

Contents

- Contents 1
- Concepts and Definitions 3
- Navigating the SLU CMS 3
 - Logging In and Out 4
 - Working in the Web Browser 5
 - Getting Help 5
 - The Status Bar 6
 - Inline Help 6
- The Top Navigation Menu 6
- Home Page 8
 - My Profile 8
- The Table View 8
 - Managing Views 9
 - Searching in Tables 10
 - Action Bar 10
 - Direct Field Edit 11
 - Viewing or Editing a Record 11
- Using the Record Form 11
 - Navigating Between Tabs 12
 - Embedded Tables 12
 - Required Fields 12
 - Conditionally Required and Visible Fields 13
 - Looking Up Record Data 13
 - Attached File Fields 13
 - Renewal / Related Contracts Tab 14
- SLU CMS Tables 15
 - People Table 15
 - Companies Table 15
 - Contracts 16
 - Contract Summaries 17
 - Approvals 17

Summary of Approving Contract Requests in the SLU CMS	18
Processing Your Approvals.....	19
Finding Your To-Do List	19
Review Pending Approval	20
Details Tab.....	20
Related Approvals Tab	22
Approve Pending Approval	24
Require Changes for a Pending Approval	24

Concepts and Definitions

The following terms will appear elsewhere in the document and are important concepts behind the design of the system.

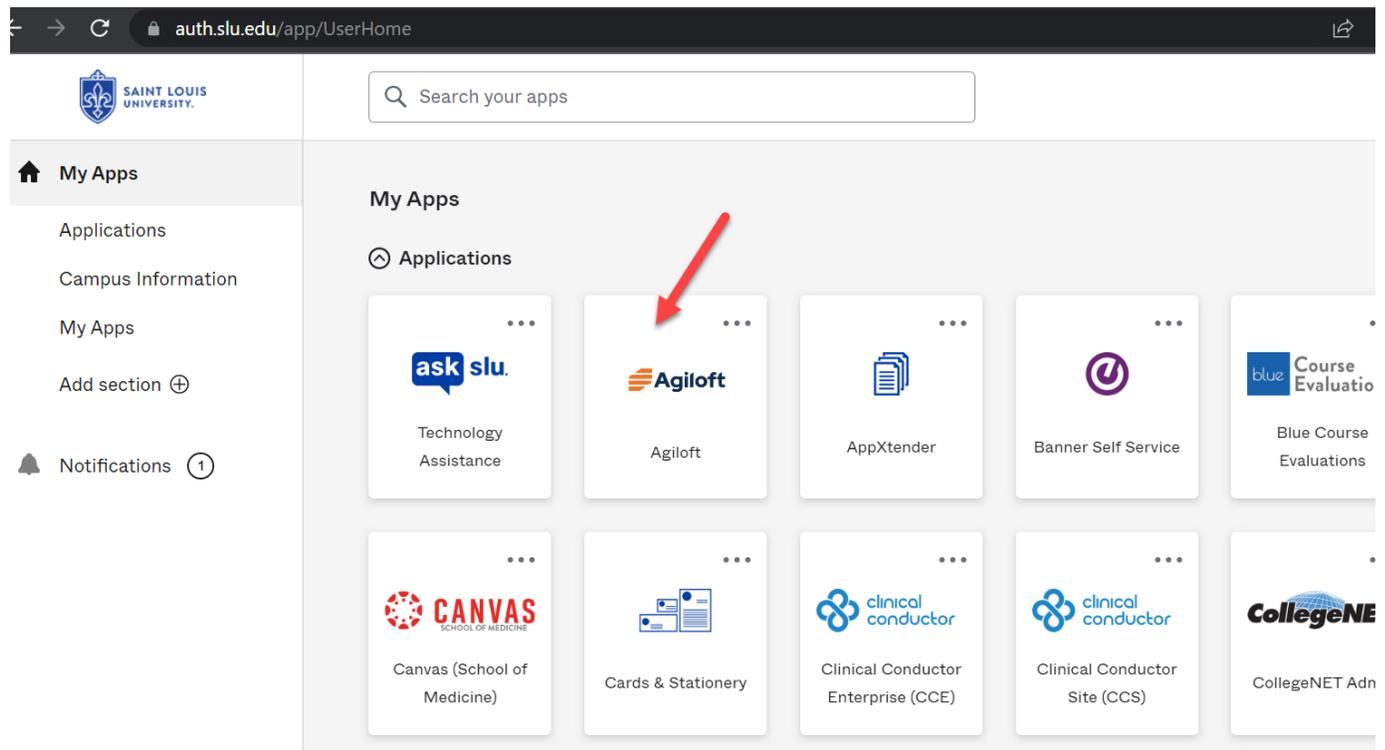
- **Power User Interface** - This refers to the interface you will see when logging into the CMS from the login page within your browser. It contains the Home Page, the Top Navigation Menu, and the view of all tables and forms to which you have access.
- **Table** – Tables contain a set of fields, records, actions, and rules for a specific purpose, such as for managing contracts in Contracts, holding user details in People, and holding company details in Company.
- **Subtable** – Subtables are made up of specifically defined records within a larger table. Tables can be hierarchical and inherit fields and rules from their parents. For example, Employees and External Users might be subtables of the People table, in which case they would automatically contain all the fields from People table as well as their own unique fields.
- **Record** – Each table will have multiple records, which consist of a form with fields. Records represent a single item related to the table subject.
- **Field** – Fields contain all the information in records, such as record descriptions, telephone numbers, attached files, date selectors, and drop-down choices.
- **Single Sign On (SSO)** - A secure access method that allows users to use one login for many applications. For more information see [Single sign-on](#).
- **View** - Determines which fields from a type of record are shown in a list of records in the table view. Views can include row coloring by issue, search filters, and custom column settings. For example, a "Company Name, End Date, and Value" view would show those specific fields from Contracts. For more information see [The Table View](#).
- **Action** – Defined steps that happen when a certain condition is met in the system. For example, all the buttons in the CMS use actions to carry out the steps that happen when they are pressed.
- **Rule** – Statements of logic executed by the system. Rules can contain actions and run when triggered, or on a timed basis.
- **Group** – Groups help secure your instance of the CMS by defining the access permissions that each user has. Group permissions define which tables, records, and fields that users may view or edit, as well as their access to special menu permissions like exporting and setup options.
- **Team** – Teams are used to identify working units of users, such as those that share a role in the system. Teams are used to send email notifications, define working hours, and aspects of the interface such as Views and Saved Searches. Users are assigned to a Primary Team and additional teams if necessary.

Navigating the SLU CMS

This section describes the system in which the SLU CMS was designed, explaining the navigation and user interface elements you will encounter in daily use.

Logging In and Out

- Access the system from the auth.slu.edu page using existing SLU credentials.



- From the Tools tab, choose the Agiloft icon to access the system.
- To log out of the system, click Logout at the upper right of the screen. This will take you back to the login screen.
- The system will also log you out automatically after 30 minutes of inactivity. This is for security purposes and to free up possibly locked records.
Note: If a record is open for edit by you, nobody else can edit it or add notes.

If you need access to the contract management system, but do not see this Icon, contact: agiloftsupport@slu.edu

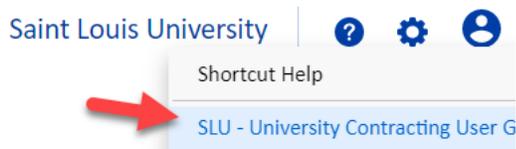
Working in the Web Browser

Since the SLU CMS is used with your own internet browser, take note of the following tips:

- The CMS works in all modern web browsers, but best in Google Chrome.
- Do not use the browser Back, Forward or Refresh button since this will take you out of the system. The CMS contains all the interface elements you need to navigate within it.
- **You must enable popups in the browser.**
- Always click Save or Cancel when you are done editing a record or it will be locked from editing by others.
- Nothing is auto-saved in the CMS. To save a record, you must click the Save button, which closes the record as well as saving it. In some screens, the Save and Continue button will save the current progress and move to the next screen.

Getting Help

The Help menu at the top right of the screen provides links to some useful documentation resources for University Contracting.



The Agiloft FAQs table contains manuals, frequently asked questions, and reference guides.



The Contract Management Home Page provides other links, and an easy link for emailing SLU Contracts help.

For help using the SLU CMS, please email agiloftsupport@slu.edu.

To access Agiloft's generic help and tutorials, please visit <https://www.agiloft.com/tutorials.htm>

For SLU CMS documentation and resources, please visit <https://www.slu.edu/busfin/departments/business-services/contract-management-system>

The Status Bar

Above each table view and record form, a status bar provides helpful information about the last actions you performed.

Status: Contract #620 successfully updated. 56 record(s) found, 2 pages.

This can include success and error messages and can be very helpful to let you know the results of the actions you took. You will often encounter errors due to incomplete or incorrectly entered data, and the notification will usually indicate what should be entered for the action to proceed as intended.

The status also reports on search results. Select the [Click for details...](#) link for more information on the search results.

Status: 47 record(s) found, 1 pages [Click for details...](#)

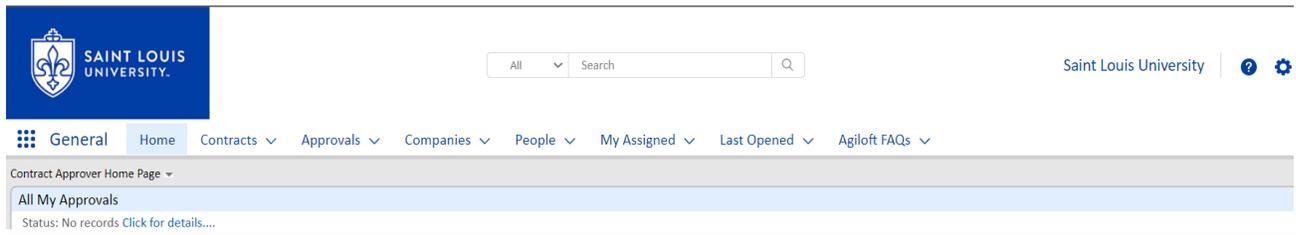
Inline Help

In addition to this, the on-screen text often provides assistance in how to carry out tasks in that part of the system.

By default, this searches only the fields in the **Attachment** table and its subtables.

Tip: To see all records, leave the search box empty.

The Top Navigation Menu

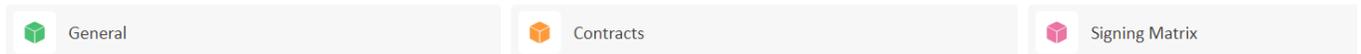


The top navigation window contains links that, when clicked, refresh the right side of your window. It contains links to the following sections:

- **Bento** (9 dots menu)  – click this icon and then use VIEW ALL to browse a listing of all commonly used tables such as *contract summaries*. This is searchable.

Navigation

All Table Groupings



System Actions

[Home](#)

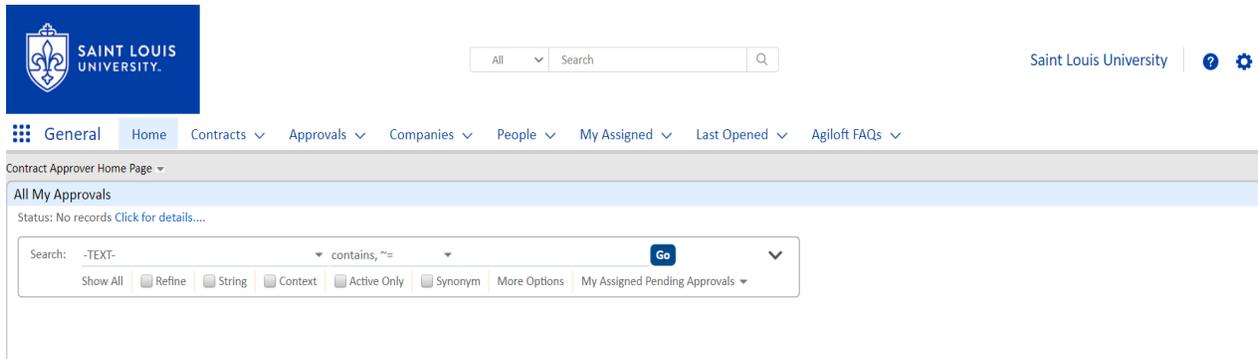
All Tables

Activity Log	Contract Categories	DocuSign Roles	Signing Matrix
Agiloft FAQs	Contract Signers	DocuSign Users	Signing Roles
All Communications	Contract Summaries	EUI Templates	Sites
Approval Templates	Contract Types	Insurance Certificates	Status Bars
Approval Workflows	Contracts	Locations	Task Templates

- **Home** – opens the home page. See [Home Page](#) for more information on what is contained here.
- **General** (a text description of this toolbar)
- **Contracts** – includes a listing of contracts you have access to view and any saved searches that are relevant to your role
- **Approvals** – any relevant approvals related to your role, if applicable
- **Companies** – listing of company entries in Agiloft
- **People** – listing of people in Agiloft (external and internal contacts)
- **My Assigned** – contracts or approvals related to your role
- **Last Opened** – the last 3 records you opened
- **Agiloft FAQs** – shows a list of help topics categorized by University Contracting, Research Contracting, or All Contracting Types; includes Q&A, manuals, and guides.

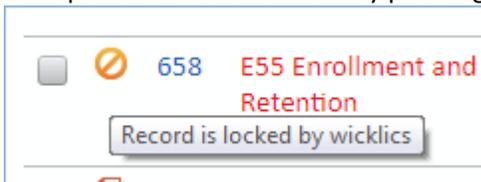
Home Page

When you first [log in](#) you will land on the Contract Approver Home Page. This home page displays several widgets and a table view of your Assigned Pending Approvals. To return to the home page at any point you can click the Home link.



If you belong to multiple Teams and the Contract Approver Home Page does not appear for you by default, you can choose it from the Home Page drop down menu. This menu allows you to switch between home pages to which you have access.

1. Clicking Home will take you back to this page.
2. Clicking the Edit icon will open the record for you to make edits. Clicking the hyperlinked ID will open the record for view mode where you cannot make edits. Only one person can edit a record at a time.
3. If instead of the Edit icon you see the "record lock" icon, it means someone else already has this record open for edit. You can hover over the button to see who has it open. In the meantime, you can open the record for view by pressing the hyperlinked ID.



4. Rows in the table can be sorted by clicking on the column headers. An arrow will appear next to the column header once you've sorted it. This table is currently sorted by the ID.

My Profile

Your profile displays your user record from the Employees table, where depending on your group permissions, you can make changes to some fields.

The Table View

The table view opens when you click any table, or one of the saved searches under the heading. It displays a list of records in the current table, refined by any search criteria you have applied.

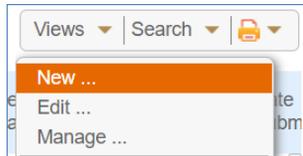
Managing Views

Table views display a defined list of fields for each record in the table and can be customized to suit your requirements. You can add key fields to the view and use views for displaying charts and reports from the table.

Views control what fields are displayed; searches determine which records are included, and in what order they are returned.

To add a custom view:

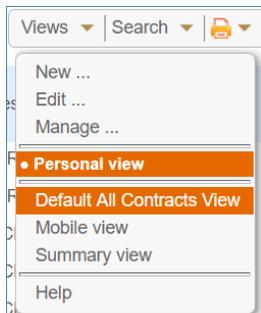
1. Select **Views > New**



2. In the View wizard, define the options for displaying the view, including:
 - a. Whether selection checkboxes should be displayed.
 - b. How many vertical lines should be shown per record and linked field.
 - c. All fields to display in the view, the text alignment, and which fields should be used to open the record in Edit and View mode.
3. In the Order/Colors tab, drag the fields left or right to define the order of fields in the layout.
 - a. Click Set Row Coloring to set a color scheme for the fields.
4. In the General tab, add a name and specify options such as whether the view is deletable, the maximum width of the table, and the number of records to display per page.
5. Apply the view to teams and click Finish.

Switching Views

To switch to another view, select the Views drop-down and click a different view in the list.



Printing Record Views

To print all the records in a view:

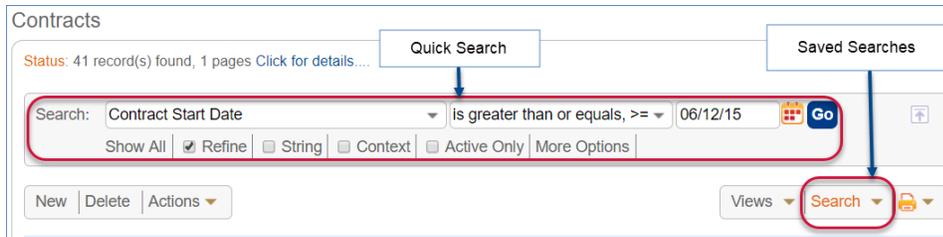
1. Select a number of records in the view, then navigate to **Print icon > Print/Download Table View**.
2. In the popup screen, click Print.

Sorting Records in a View

Click the field heading to sort the records by that column. To add a second sorting column, hold down SHIFT on your keyboard, and click the second column heading on which you want to sort.

Searching in Tables

In every widget view you can search for records by pressing the search button and then typing in your search term. This is called a [Quick Search](#); for a more complex search you can use a [Saved](#)



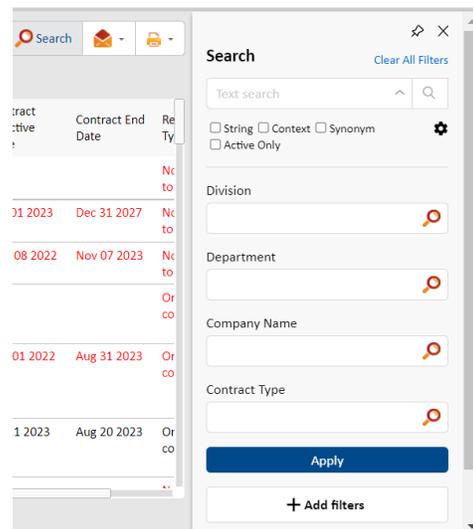
[Search.](#)

The search functionality is very advanced and allows you to use various operators and refine results with additional search parameters. You can also specify the order of the results that are returned.

On table views, use the search icon:

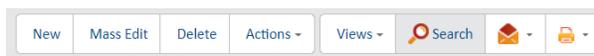


The search results open in the right-hand side:



Action Bar

Above each table, the action bar contains some useful functions for managing the records.



Some of these functions might include

- **New** – create a new record in the table.
- **Actions** – perform the following actions on the table:

- **Export** – opens the import/export wizard where you can the records to another system. For more information, see [Import Export](#).
- **Views** – see [Managing Views](#) for more information.
- **Search** – see [Searching in Tables](#) for more information.
- **Print** – offers several options for printing items from the table. These include the table view, all fields from the table, print templates, and print documents that have been added to the table.

Direct Field Edit

Depending on permissions, some fields can be edited and saved directly from the table view, which can greatly aid productivity when working with batches of records. These table view columns will be marked with an edit icon.



The screenshot shows a form for editing the 'Attachment Type' field. At the top, it says 'Attachment Type' with a pencil icon and 'Attached File'. Below that is a dropdown menu with the selected value 'Document Provided by Outside Party'. At the bottom of the form are three buttons: 'Next', 'Save', and 'Cancel'.

To edit the field, click directly on it. This will open the edit mode for the field type, such as a drop-down list or a lookup for a linked field. After entering a new value, select one of the following options:

- **Next** – closes the field edit with the new value kept, but not saved. Many fields can be kept ready for saving. To save or cancel all the changes together, click Save Changes or Cancel Changes from the action bar.
- **Save** – closes the field with the new value saved.
- **Cancel** – closes the field with the new value not saved or kept.

Viewing or Editing a Record

When you look at the list of records in a table view, you will see that some of the columns are hyperlinked. The Edit column and field description columns such as Contract Title open the record in edit mode, while the ID link opens in view-only mode.



The screenshot shows a table with three columns: 'Edit', 'ID', and 'Contract Title'. The 'Edit' column contains a pencil icon, and the 'ID' column contains a downward arrow icon. The first data row has ID '367' and 'ZOHO Corp 2016/2017'. The second data row has ID '366' and 'IT Contract for Xmatters'.

Once a record has been opened, you can tell whether it is in view or edit mode by the buttons at the top. In view mode, the top will show Edit and Close buttons, whereas in edit you will see Save and Cancel buttons. **Save** **Cancel** Note that if you do not have edit permissions you will only see the Close button in view mode.

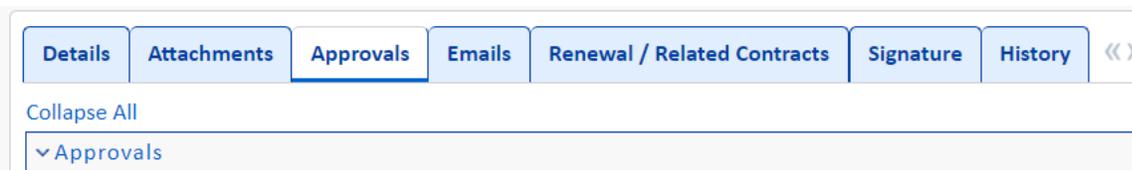
In edit mode you will see input boxes, drop-downs for choice fields, and radio buttons to help lookup and select the field values. Only one user may edit a record at a time, and while editing the record is locked from editing for anyone else, although multiple people can still view the record while it is being edited. It is good to get into the habit of saving or cancelling the record when you take a break.

Using the Record Form

Record forms can be very large, consisting of many different field types, action buttons, related tables, and tabs that will navigate you through the record workflow. The tips below will help familiarize you with the elements you will encounter in various records, including some special field types.

Navigating Between Tabs

Forms will generally contain multiple tabs with their own information, as well as a common area that spans across the top of all the tab content.

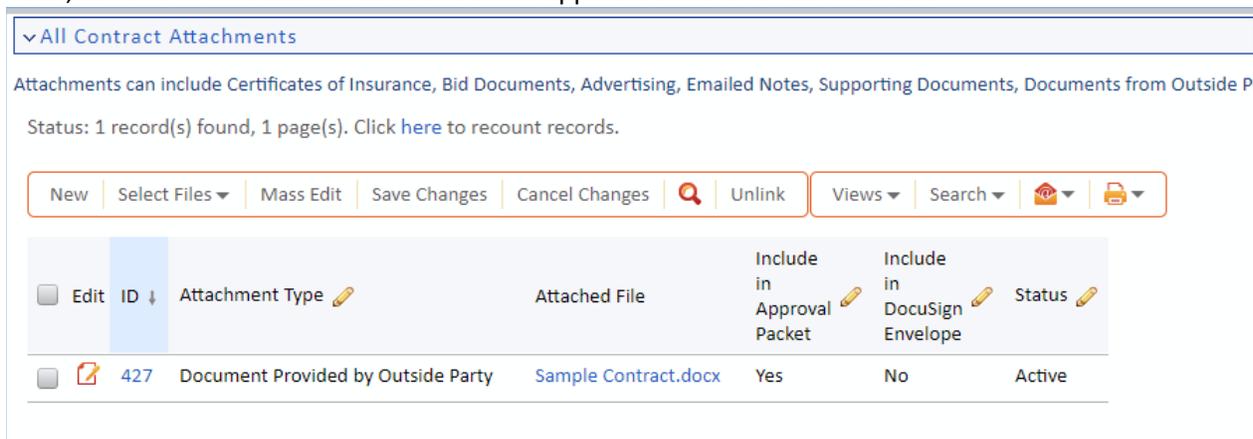


To navigate to another tab, you can click on the tab itself or on the arrows to the right of the last tab:



Embedded Tables

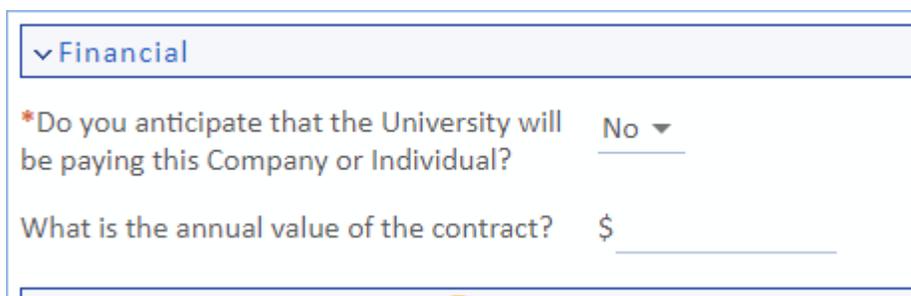
Record forms often contain several embedded table views in the form of related tables. These are basically the same as the standard table view, but the records refer to the related table. For example, the Attachments section on the Details tab of the Approval form shows a table view of the Attachments table, filtered to attachments included in the approval record for this contract.



<input type="checkbox"/> Edit	ID ↓	Attachment Type	Attached File	Include in Approval Packet	Include in DocuSign Envelope	Status
<input type="checkbox"/>	427	Document Provided by Outside Party	Sample Contract.docx	Yes	No	Active

Required Fields

Some fields must be filled out before the record can be saved. These will be indicated with a red asterisk.



If you try to save the record with one of these fields not yet filled in, you will be prevented with an on-screen pop-up notification.

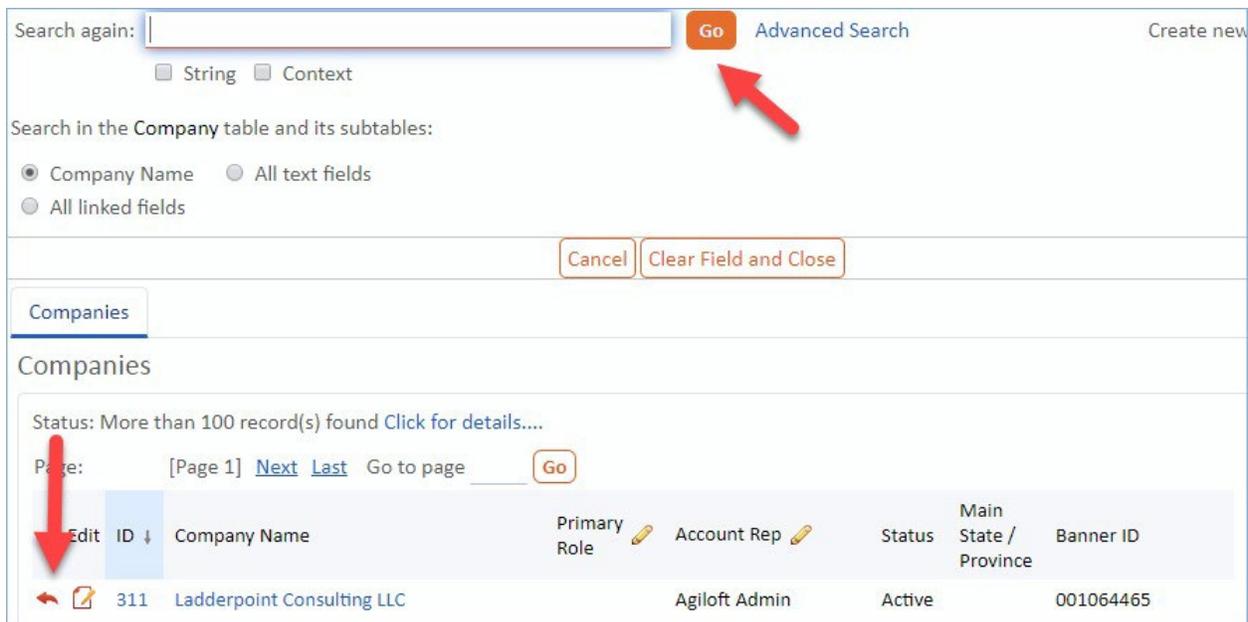
Conditionally Required and Visible Fields

Some fields will become mandatory if a certain condition happens. In addition, many fields will not be visible unless a condition happens, such as another field value being selected. In SLU's system, this often happens based on the Contract Type or print template selected.

Looking Up Record Data

You will often encounter fields that use a lookup icon; these are linked to another table and require you to find the relevant record from that table to import it into the field. For example, the Company Name field for Contract Party Information is a linked field lookup to the Companies table.

1. Click the lookup next to the field .
2. Search for the record name and click Go.
3. Select the arrow next to the field to import it.



Search again: [Advanced Search](#) [Create new](#)

String Context

Search in the **Company** table and its subtables:

Company Name All text fields
 All linked fields

Companies

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

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

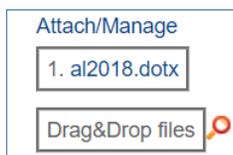
Edit	ID ↓	Company Name	Primary Role	Account Rep	Status	Main State / Province	Banner ID
	311	Ladderpoint Consulting LLC		Agiloft Admin	Active		001064465

Note that this will often populate multiple detail fields at once.

Attached File Fields

You will often work with attached documents, particularly in Microsoft Word format. These make use of the file with versioning field type, and it is helpful to understand some aspects of this type of data.

To add documents to the field, simply drag them from your desktop into the Drag&Drop files field. The field will automatically upload the new document.



Attach/Manage

1. al2018.dotx

Drag&Drop files 

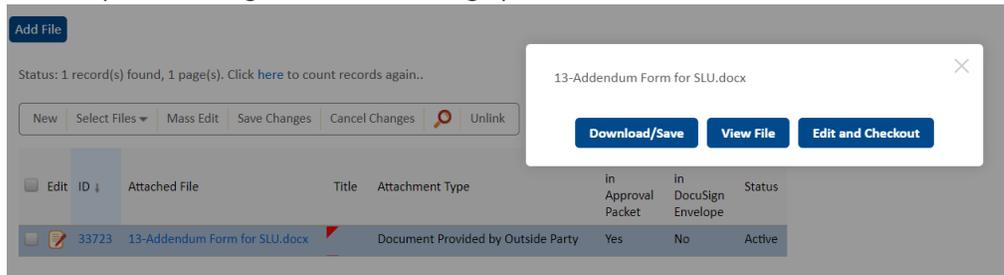
Some fields are restricted from holding more than one file at a time, due to the purpose of the field. If you attempt to add another file by dragging and dropping, you will be prevented with an error.

To manage the files or attach them manually, click Attach/Manage. This will open a dialog where you can click Attach Files to add files manually.

Direct File Editing

Depending on permissions and the status of contract requests, some Microsoft Office files in the CMS can also be edited directly and saved without having to re-upload them manually. MS Word, Excel, and Powerpoint are supported, though only Microsoft Word supports Track Changes.

1. Click the Word document's name in either in the table view or in the record field.
2. This opens a dialog with the following options:

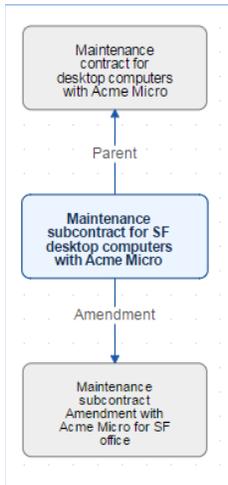


- a. **Download/Save** – downloads the file to your desktop. Use only when you do not need to make comments or change a document.
- b. **View File** – opens the file in view mode. Use only when you do not need to make comments or change a document.
- c. **Edit and Checkout** – opens the file in edit mode. Saving the document in this mode will automatically sync it in the field. When a file is checked out, it cannot be edited by other users at the same time.

Renewal / Related Contracts Tab

It is quite common for multiple records in the CMS to be related to each other. For example, a contract may have several subcontracts and amendments, which would normally need to be identified through a search or a related table. The Relationship Diagram field type provides a visual illustration of the relationships between records.

To view the relationship diagram, click the 🌳 icon next to the Diagram field. This opens a tree view of the relationships, with the relationship shown according to the direction of the arrow. For example, the following case shows a parent having an amendment relationship to its child contract and a parent relationship to its parent.



Click the name of a record to open the record in a new screen.

SLU CMS Tables

The SLU CMS gives you primary access to several tables that are important for your daily work in the system, as well as secondary access to background tables that you will encounter in the form of related tables or linked fields. These tables hold specific fields and logic such as actions and rules to manage the data they contain and interact with the other tables in the system.

For example, the Attachments table is not shown in top navigation menu, but it contains all the records that are created whenever a document is attached to a record. In the Details tab of the Contracts table, the Attachments table is shown as a view, with logic to limit the records to those related to the current contract.

Clicking on the main table in the top navigation will show you ALL records in that table that your group permissions allow you to access.

Some of the tables you will work with are described below:

People Table

The People table uses two sub-tables to distinguish between Employees and External Users and holds the details of all employees and contacts in the system. The details of these people are used to populate your contracts, which can often happen by performing a lookup on their name. Whenever a contract is added, the contact details are automatically created in the People table.

The People table also keeps a record of the email addresses and emails sent and received for each user.

Companies Table

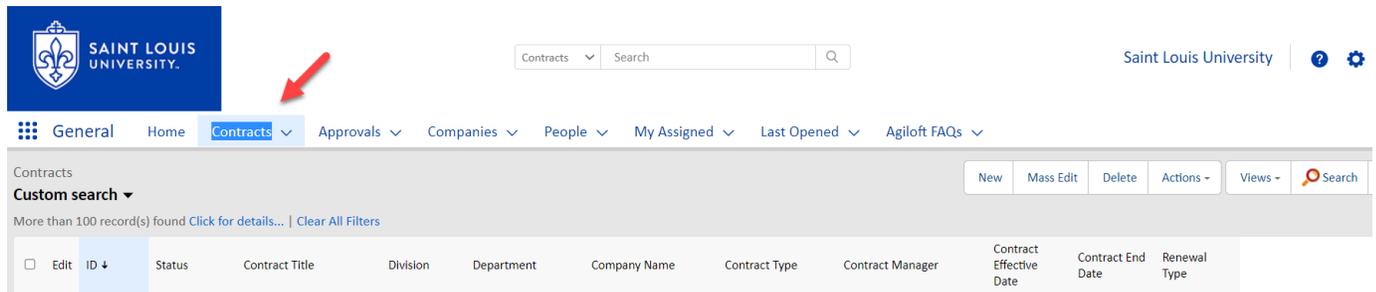
The Companies table holds the details of all companies in the system. Companies are assigned roles based on their relationship to the company, such as vendors, partners, or customers.

Companies that you may add to Agiloft do NOT automatically get added to Workday.

Contracts

The Contracts table contains all contracts in the system. The Approver Group in general has view access to BAAs and Affiliation Agreements, and contracts for their own Department, and contracts for which their Approval Team has been assigned to approve. If you belong to more than one Group, your permissions may be different.

Remember, clicking Contracts in the top navigation menu will show you ALL records in the system you're allowed to see.



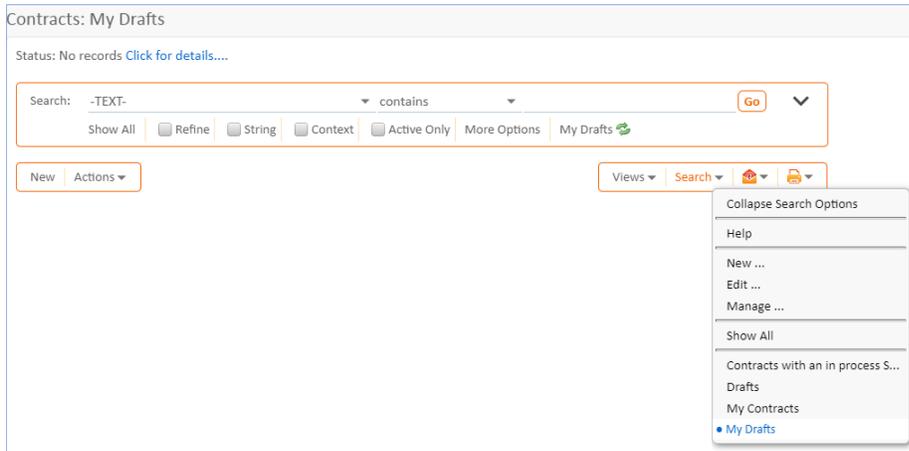
The screenshot shows the Saint Louis University Contracts page. The navigation menu includes 'General', 'Home', 'Contracts', 'Approvals', 'Companies', 'People', 'My Assigned', 'Last Opened', and 'Agiloft FAQs'. The 'Contracts' menu item is highlighted with a red arrow. Below the navigation menu is a search bar and a table of contracts. The table has columns for Edit, ID, Status, Contract Title, Division, Department, Company Name, Contract Type, Contract Manager, Contract Effective Date, Contract End Date, and Renewal Type. The table is currently empty.

Saved Searches

There are some saved searches pinned under the main Contracts table which gives you filtered access to some of your more important records. Depending on your group permissions, you may see more or less of these searches:

Search	What the search shows...
My Assigned Contracts	Approver is the selected Contract Manager or is the Responsible Party, and the status is in process (everything before active but draft and canceled.)
My Contracts	I'm the Requester or the Responsible Party.

There may be other searches available to you by hovering over Search in the right pane:



Contract Summaries

The Contract Summaries table displays summary information only about all contracts in the system, including those that are confidential, or outside your departments.

If you have permission to see further into those contracts, you'll be able to click on a link within the Contract Summaries record to take you into the actual Contract record.

Approvals

This is the main table that you will interact with as an Approver. In general, Approvers can edit Approvals that are Pending Approval and assigned to them specifically, or in some cases, assigned to their Approval Team. Approvers in general can see approval records if they are one of the approvers, there's no approver specified and they're on the approval team, or they're the Contract Manager for the associated contract.

Saved Searches

There are saved searches pinned under the main Approvals table in your left pane, which gives you filtered access to some of your more important records.

Search	What the search shows...
My Approvals	Approver is the specified Approver, or the Approver is empty and approver is on the Approval Team, or the approver is one of the Department Approvers, or the Approver is the Contract Manager.
My Assigned Pending Approvals	This is the main search showing action items for an approver. These approvals are Pending Approval, and can be approved by the approver.

There may be other searches available to you by hovering over Search in the right pane.

Summary of Approving Contract Requests in the SLU CMS

This section runs through the steps of approving a contract that has been submitted to you through the Contract Management CMS. The steps below represent a typical scenario that should be followed once a contract has been submitted through the CMS. The contract will automatically be routed to you based on a number of factors:

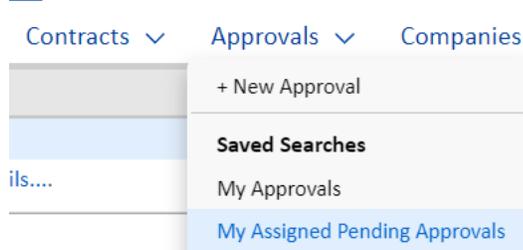
1. You may be on an Approval Team responsible for approving contracts based on answers to the Contract's intake questions or based on the Contract Type.
2. You may be a Department Approver, responsible for approving contracts for your department.
3. You may be an ad hoc approver, added to the list of required approvals by someone else in the contract's workflow.

You will...

1. Receive an email notifying you that your approval is required.

Subject	Contract #697 requires approval
Content	The contract shown below is ready for your approval. Click Approve to approve the contract and route to the next approval. Click Review to view the approval record and change the status directly.
Status:	Pending Approval
Approval Team:	OGC Team
Contract ID:	697
Contract Company Name:	zGoogle
Contract Start Date:	Oct 01 2018
Contract Amount:	\$20,000

2. You can click the Approve link to immediately approve the request or click the Review link to log into the SLU CMS and open the Approval record. This will give you access to any of the contract request's attachments sent along with the Approval.
3. When you are logged into Agiloft, you will also see any approvals assigned to you in the My Assigned area in the top navigation menu under Approvals or on the Contract Approver Home Page. You can open the approval record by clicking the Edit icon to the left of the record in table view.
4. If needed, edit the contract document using Microsoft Word and the "Edit and Checkout" feature. Changes will automatically be saved in the CMS. To do this, click on the name of attachment to review the document. In the pop-up window, choose "Edit and checkout." Make sure Track Changes is on and add your changes and/or comments.
5. To see other approvers for the contract request, click the Related Approvals tab. If you think the contract request requires additional approvers, add the approval with the correct step number, approver team and approver name and save.
6. Once you have completed your review, and optionally added any other approvers you think are necessary, you can either Approve the record to advance it to the next step in the workflow, or you can Require Changes.
7. Approve it by clicking the Approve button. This will mark your Approval record as "Approved," and remove it from the My Assigned Pending Approvals search.



8. Require changes by adding Approval Notes, and then clicking Require Changes. This will send the request back to the Contract Manager with specific notes included. The contract manager should respond back after review and use the “resend for approval” action within your approval.

Processing Your Approvals

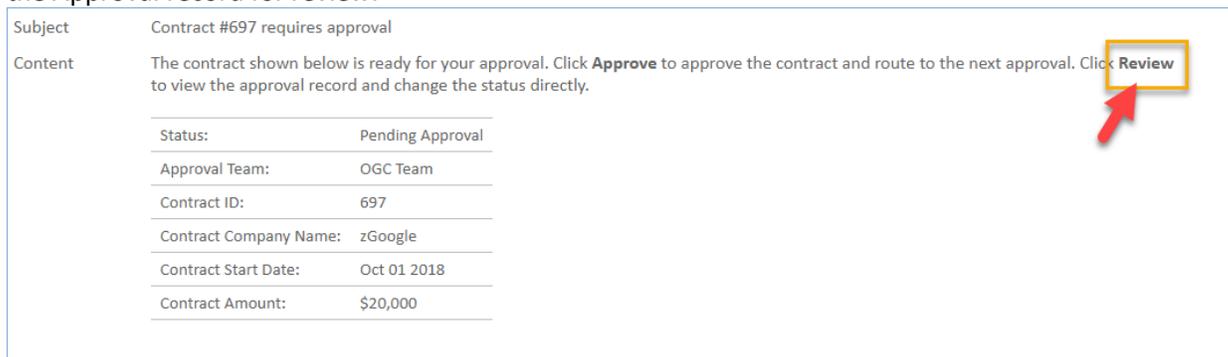
When a contract requester submits a contract, it first routes through Contract Type and Compliance Approvals, after which it will go to the specified Contract Manager. (The choices of contract managers for each department are configured by the administrators of the system.)

Once the Contract Manager is ready, they will send it on the Department Approver(s).

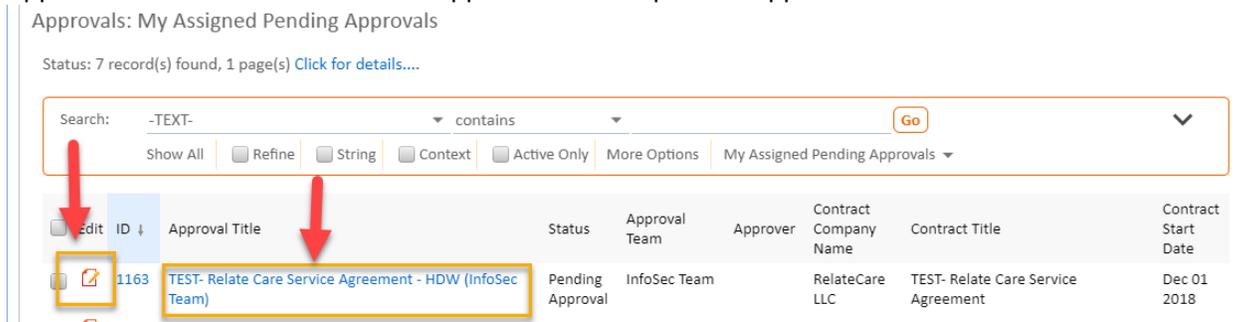
Finding Your To-Do List

There are three main ways to see your Pending Approvals:

1. Email. You will receive an email when your approval is required. Click the "Review" link to open the Approval record for review:

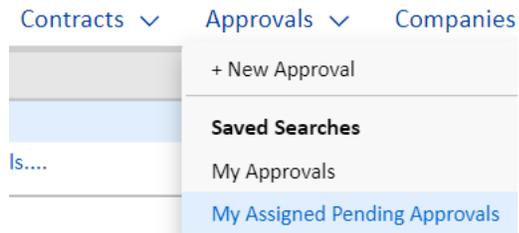


2. Contract Approver Home Page. The Contract Approver Home Page lists your Assigned Pending Approvals. Click the Edit icon or the Approval Title to open the Approval record for review:



3. My Assigned. The My Assigned section in the Top Navigation Menu lists your Assigned Pending Approvals, along with the total number of records requiring your approval.

Click that search to display the results and open the record for review as described in option 2 above.



Review Pending Approval

To review the contract request:

1. Get an overview of the Approval by looking at the Approval form and looking at all the tabs.
2. Review any attachments, turn Track Changes on, and add comments or make changes as necessary.
3. Review specific contract request details as necessary.
4. Look at who else will be approving it.
5. Determine whether anyone else is needed and add them as necessary.
6. Add any notes to Approval Notes. Notes are required if you will not approve.
7. Click Approve to Approve or click Require Changes to send it back to the Contract Manager.

Details Tab

The first two sections of the Details tab show you the Status, the Approval Title, which indicates why you're seeing it, buttons to Approve and Require Changes, and where this approval falls in the order of all approvals for the contract (Step Number):

Approval

[Save](#)
[Cancel](#)
[Details](#)
[Related Approvals](#)
[Emails](#)
[History](#)

[Collapse All](#)

ID: 1163 Status: Pending Approval

Approval Title: TEST- Relate Care Service Agreement - HDW (InfoSec Team)

[Approve](#)
[Require Changes](#)

Contract Managers List

Status: 3 record(s) found, 1 page(s). [Click here](#) to recount records.

<input type="checkbox"/>	Edit	ID ↓	Division Name	Department Name	Intake Person	Contract Manager	Department Code
<input type="checkbox"/>		835	SLUCare Clinical Affairs	SLUCare Administration	contractmanager1...	contractmanager1...	D445
<input type="checkbox"/>		366	SLUCare Clinical Affairs	SLUCare Administration	Katy Wittwer	Katy Wittwer	D445
<input type="checkbox"/>		345	SLUCare Clinical Affairs	SLUCare Administration	Mary Lynn Thompson	Mary Lynn Thompson	D445

[Approval Details](#)

*Step Number: 1

Approval Team: InfoSec Team Approver: _____

Department Approvers

Status: No records.

Other sections include:

[Approval Notes](#)

Approval Notes

[Approval Running Notes](#)

Approval Running Notes

[Attachments](#)

Status: 1 record(s) found, 1 page(s). [Click here](#) to recount records.

ID ↓	Attachment Type	Attached File	Include in Approval Packet	Include in DocuSign Envelope	Status
477	Document Provided by Outside Party	Relate Care Agreement.docx	Yes	No	Active

[Contract Details](#)

Contract ID: 739

Contract Title: TEST- Relate Care Service Agreement

Contract Company Name: RelateCare LLC Contract Owner: Alicia Kosydor Contract Manager: Katy Wittwer

Approval Notes

The system requires that you enter Approval Notes if you are requiring changes. You can also use Approval Notes to explain anything you feel is useful or necessary or want to have on record.

Attachments

Any contract attachment records marked as being included in the Approval packet are listed here. You can click the Attached File name (in blue) to view the attachment, or if allowed, edit the attached document.

Reviewing Attachments

Click the Attached File name to review the attachment:

If you will not need to make any changes or add any comments to the attachment, you can click "View File."

Otherwise, click "**Edit and Checkout.**" This will allow you to make changes directly within the document, and prevent other approvers from making changes at the same time. Changes you make will be saved directly to the system on the cloud. If Edit and Checkout is not available to you, it may mean that it's already been checked out by someone else.

The screenshot shows a document management interface. At the top, it says "Status: 1 record(s) found, 1 page(s). Click [here](#) to count records again..". Below this is a toolbar with buttons for "New", "Select Files", "Mass Edit", "Save Changes", "Cancel Changes", and "Unlink". A table lists attachments with columns for "Edit", "ID", "Attached File", "Title", "Attachment Type", "in Approval Packet", "in DocuSign Envelope", and "Status". One row is highlighted with a blue background, showing ID "33723", "13-Addendum Form for SLU.docx", "Document Provided by Outside Party", "Yes", "No", and "Active". A modal window titled "13-Addendum Form for SLU.docx" is open, showing three buttons: "Download/Save", "View File", and "Edit and Checkout". A red arrow points to the "Edit and Checkout" button.

Edit	ID	Attached File	Title	Attachment Type	in Approval Packet	in DocuSign Envelope	Status
<input type="checkbox"/>	33723	13-Addendum Form for SLU.docx		Document Provided by Outside Party	Yes	No	Active

Please ensure that Track Changes is turned on if you use Edit and Checkout by going to Review > Track Changes.

Note: Edit and Checkout is available for Microsoft Word, Excel and PowerPoint. Track Changes is only available for Microsoft Word.

Reviewing Contract Details

If you need to see more contract details, you can click on the hyperlinks in the Contract Details section to open the Contract request record.

Related Approvals Tab

The Related Approvals tab gives you access to related Approvals:

[Add Ad Hoc Approval](#)

Use this to filter the list of approvers or to assign to a team

Ad Hoc Approver Team Ad Hoc Approver

[Add Ad Hoc Approval](#)

[Concurrent Approvals](#)

Any approval records with the same step number as this approval are shown here.

Status: 5 record(s) found, 1 page(s). Click [here](#) to recount records.

<input type="checkbox"/>	Edit	ID	Step Number	Status	Approval Title	Approver	Approval Team	Approved/Rejected By
<input type="checkbox"/>		1164	1	Pending Approval	TEST- Relate Care Service Agreement - HDW (Export Controls Team)		Export Controls Team	
<input type="checkbox"/>		1162	1	Pending Approval	TEST- Relate Care Service Agreement - HDW (Compliance Team)		Compliance Team	
<input type="checkbox"/>		1161	1	Pending Approval	TEST- Relate Care Service Agreement - HDW (Risk Management Team)		Risk Management Team	
<input type="checkbox"/>		1160	1	Pending Approval	TEST- Relate Care Service Agreement - HDW (OGC Team)		OGC Team	
<input type="checkbox"/>		1159	1	Pending Approval	TEST- Relate Care Service Agreement - HDW (Treasury Team)		Treasury Team	

Number of Open Concurrent Approvals 5

[Next Approvals](#)

The approval(s) next in the workflow queue for this contract are shown here.

Status: 1 record(s) found, 1 page(s). Click [here](#) to recount records.

Add Ad Hoc Approver

If there is someone else who should approve the contract request and they are not listed in Concurrent Approvals or Next Approvals, you can add them in the Add Ad Hoc Approval section.

You can choose the Approval Team and/or the Approver. Select the Ad Hoc Approver Team; this will refresh the list of approvers on that team. Then optionally choose the Ad Hoc Approver. Click Add Ad Hoc Approval to create a new approval record in Pending Approval status at the same step as your approval.

Note: The approver you choose must have the appropriate permissions to be able to approve the record.

Concurrent Approvals

This related table shows all approvals for this contract request at the same step number as the current approval.

Next Approvals

This related table shows the approvals that are scheduled next in the workflow queue after the current approval.

Approve Pending Approval

To approve the request, click the Approve button at the top of the form:

ID	1163	Status	Pending Approval ▼
Approval Title	TEST- Relate Care Service Agreement - HDW (InfoSec Team)		
		<input type="button" value="Approve"/>	<input type="button" value="Require Changes"/>

Require Changes for a Pending Approval

If changes are required, add Approval Notes about what kind of change is required and then click Require Changes. This will change the Approval's status to "Requires Change," and notify the Contract Manager that a change is required.

ID	1163	Status	Pending Approval ▼
Approval Title	TEST- Relate Care Service Agreement - HDW (InfoSec Team)		
	<input type="button" value="Approve"/>		<input type="button" value="Require Changes"/>