SLU Contracts

Contract Management Team User Guide

Last Updated: July 29, 2020

© Agiloft, Inc. 2018

Contents

Contents 1
Concepts and Definitions 3
Navigating the SLU CMS 3
Logging In and Out 3
Working in the Web Browser 4
Getting Help 5
The Status Bar 5
Inline Help 6
The Left Pane 6
Home Page 7
My Profile 8
The Table View 8
Managing Views 8
Searching in Tables 9
Action Bar 10
Direct Field Edit 10
Viewing or Editing a Record 10
Using the Record Form 11
Navigating Between Tabs 11
Embedded Tables 11
Required Fields 12
Conditionally Required and Visible Fields 12
Looking Up Record Data 12
Attached File Fields 13
Renewal / Related Contracts Tab 14
SLU CMS Tables 14
People Table 15
Companies Table 15
Contracts 16
Contract Summaries 18
Summary of Contract Management in the SLU CMS 19

Overview of Contract Tabs 20
Details Tab 20
Special Fields for Contract Manager 21
Attachments Tab 21
Approvals Tab 22
Emails Tab 24
Renewal / Related Contracts Tab 25
Contract Renewals 25
Related Contracts 26
Canceling a Contract 26
Signature Tab 27
Processing Contracts 28
Handling Required Changes 28
Review the Request – Contract Manager Approval Step 29
Sending on to Department Approvers 30
Preparing for Signature 31
Status Changes 36
Additional Resources 37

Concepts and Definitions

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

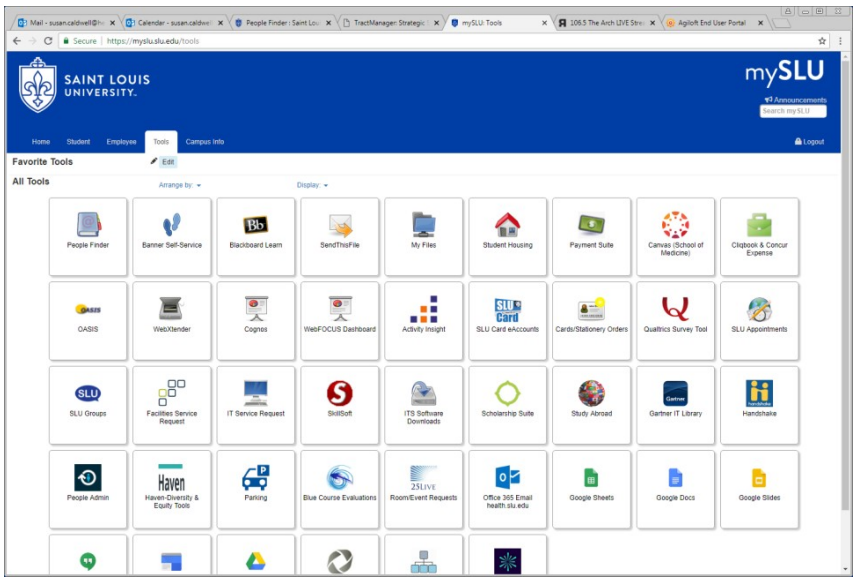
- **Power User Interface** - This refers to the interface you will see when logging into the CMS from the login page within your browser. It contains the Home Page, the Left Pane, the view of all tables and forms to which you have access.
- **Table** – Tables contain a set of fields, records, actions 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

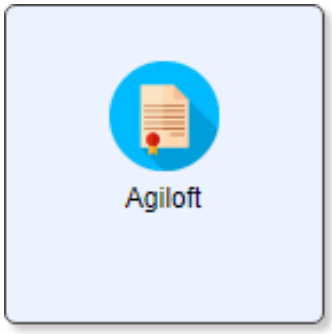
This section describes the system in which the SLU CMS was designed, explaining the navigation and user interface elements you will encounter in daily use.

Logging In and Out

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



- From the Tools tab, choose the SLU Contracts icon to access the system. If you are already signed into that system, clicking the link to the CMS will automatically log you in.



- 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 on your MySlu Tools page, please contact:

Ellen Borowiak, ellen.borowiak@slu.edu

Katy Wittwer, katy.wittwer@health.slu.edu

Working in the Web Browser

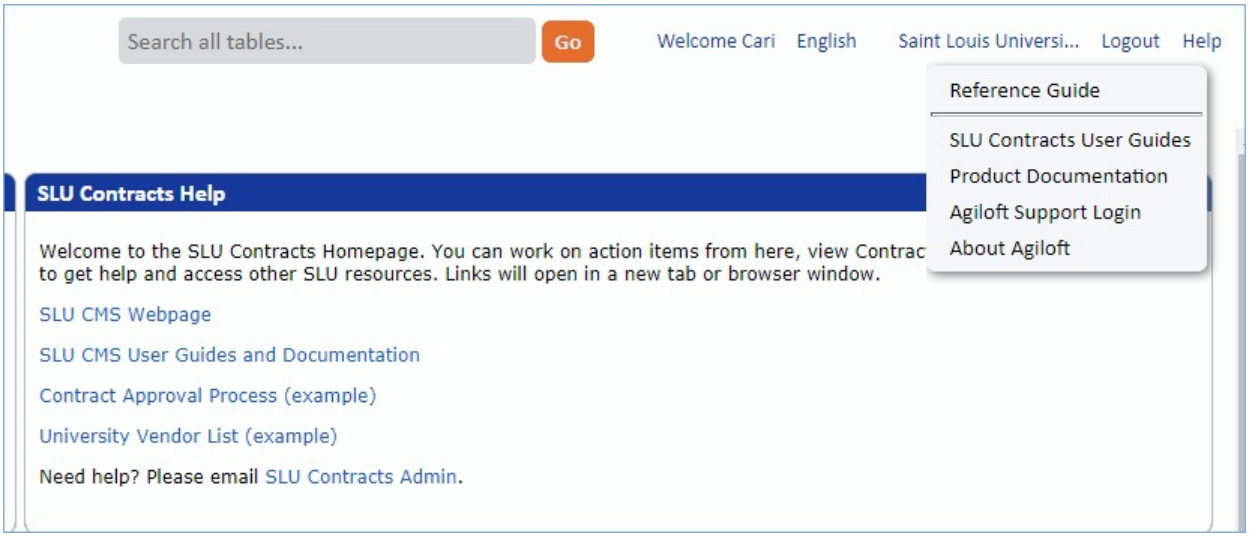
Since the SLU CMS is used with your own internet browser, take note of the following tips:

- The CMS works in all modern web browsers.

- 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.



The Reference Guide will take you to the Agiloft Wiki, which describes the complete system in detail. SLU Contracts User Guides will take you to the SLU Contracts site, where you can download specific documentation for your system, including this guide. Product Documentation takes you to Agiloft's website, where you can access additional generic software documentation and tutorial videos.

You can also request Agiloft technical support if needed.

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

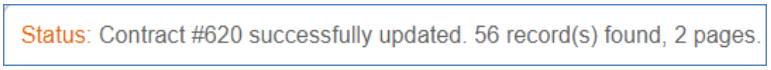
For help using the SLU CMS, please email slucontractsadmin@slu.edu.

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

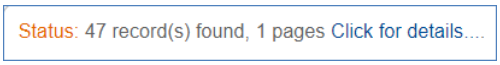
The Status Bar

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



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.

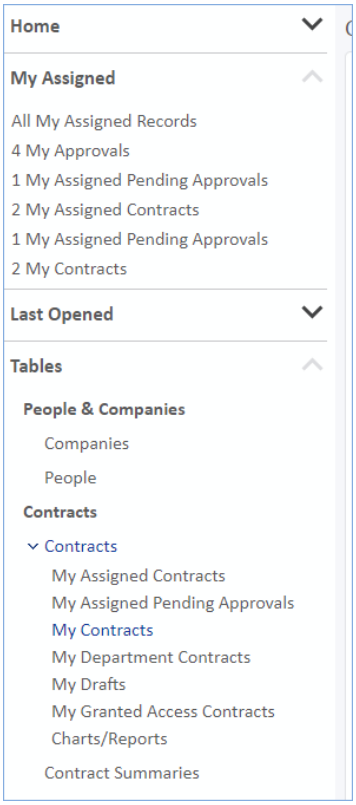
The status also reports on search results. Select the Click for details… link for more information on the search results.



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.

The Left Pane



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

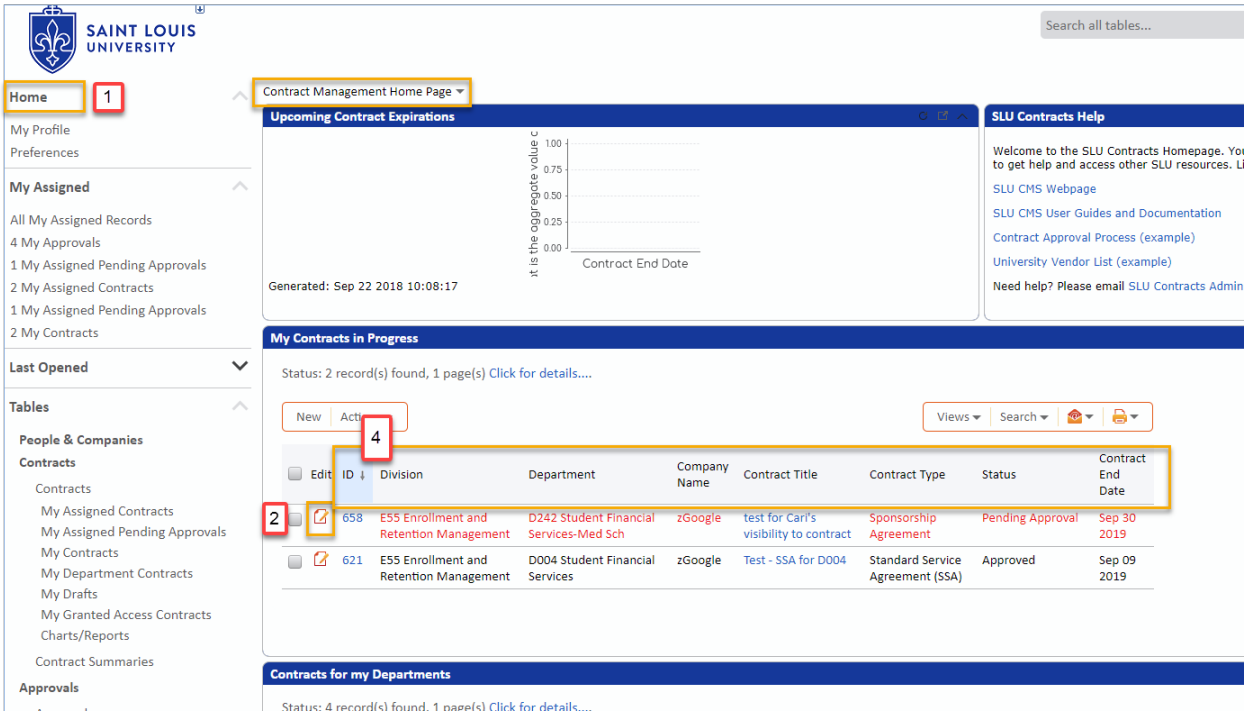
- **Home** – opens the home page. See Home Page for more information on what is contained here.
- **My Assigned** – displays a list of saved searches you can click on for easy reference; the numbers in front of the searches tell you how many records the search finds.
- **Last Opened** – displays a list of the last five records opened by you for quick access.
- **Tables** – displays the tables to which you have access. In the SLU CMS, you can access the following tables as Contract Manager (though you may see more, if you belong to more than one group):
    - People
    - Companies
    - Contracts

Home Page

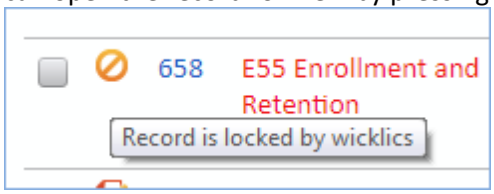
When you first log in you will land on the Contract Management Home Page. This home page displays several widgets, including SLU Contracts Help, and table views of contracts (My Contracts in Progress and Contracts for my Departments). To return to the home page at any point you can click the Home link.

My Contracts in Progress displays all contracts for which you are the Contract Manager or the Responsible Party, and the status is in progress.

Contracts for my Departments shows all contracts for your own Department, or for Departments you're assigned as a contract manager.



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 heading in the left pane, 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.

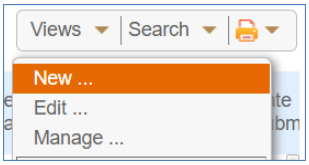
Managing Views

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:

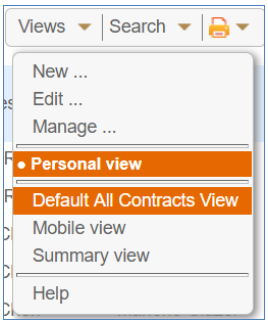
1. Select **Views > New**



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:

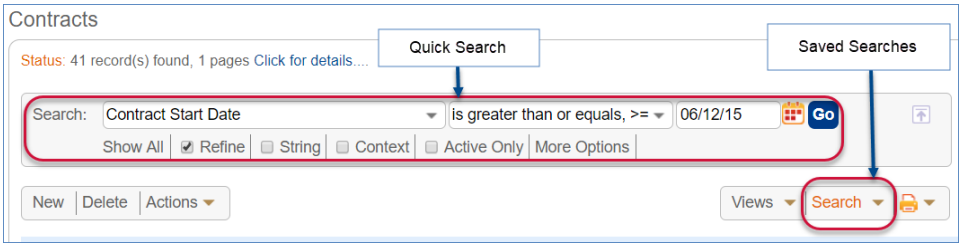
1. Select a number of records in the view, then navigate to **Print icon > Print/Download Table View**.
2. In the popup screen, click Print.

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 table 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.

Refer to Help > Reference Guide in the upper right of the SLU CMS for assistance on how to use searches effectively to improve your productivity. For example, you could set up a saved search of all Contracts owned by you where the status is Pending Contract Manager, and the start date is the coming month, sorted by start date. This search could be pinned to your left pane for quick access, by dropping down the Contracts left pane item.

Action Bar

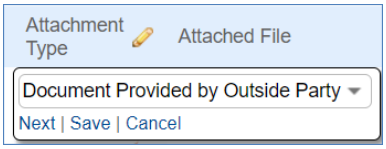
Above each table, the action bar contains some useful functions for managing the records.

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.



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.

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.

Note that if you do not have edit permissions you will only see the Close button in view mode.

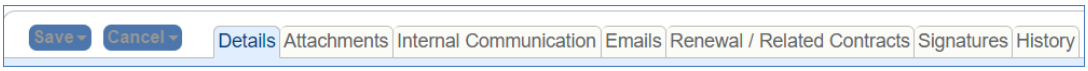
In edit mode you will see input boxes, drop-downs for choice fields, and radio buttons to help lookup and select the field values. Only one user may edit a record at a time, and while editing the record is locked from editing for anyone else, although multiple people can still view the record while it 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.

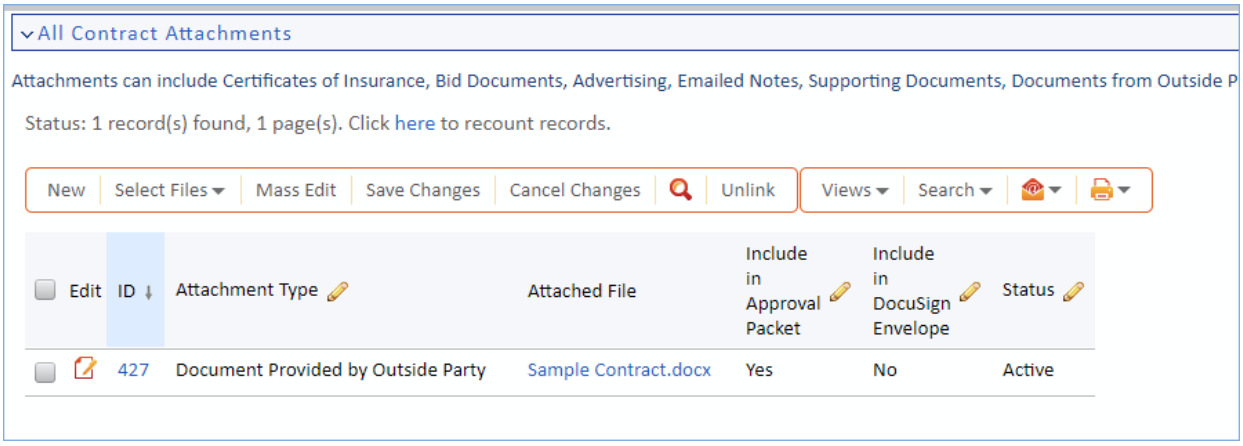


replace screenshot

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

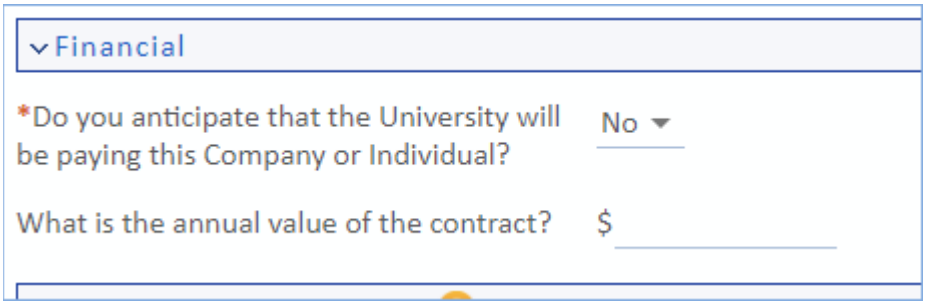
Embedded Tables

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 All Contract Attachments section on the Attachments tab of the Contracts form shows a table view of the Attachments table.



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.

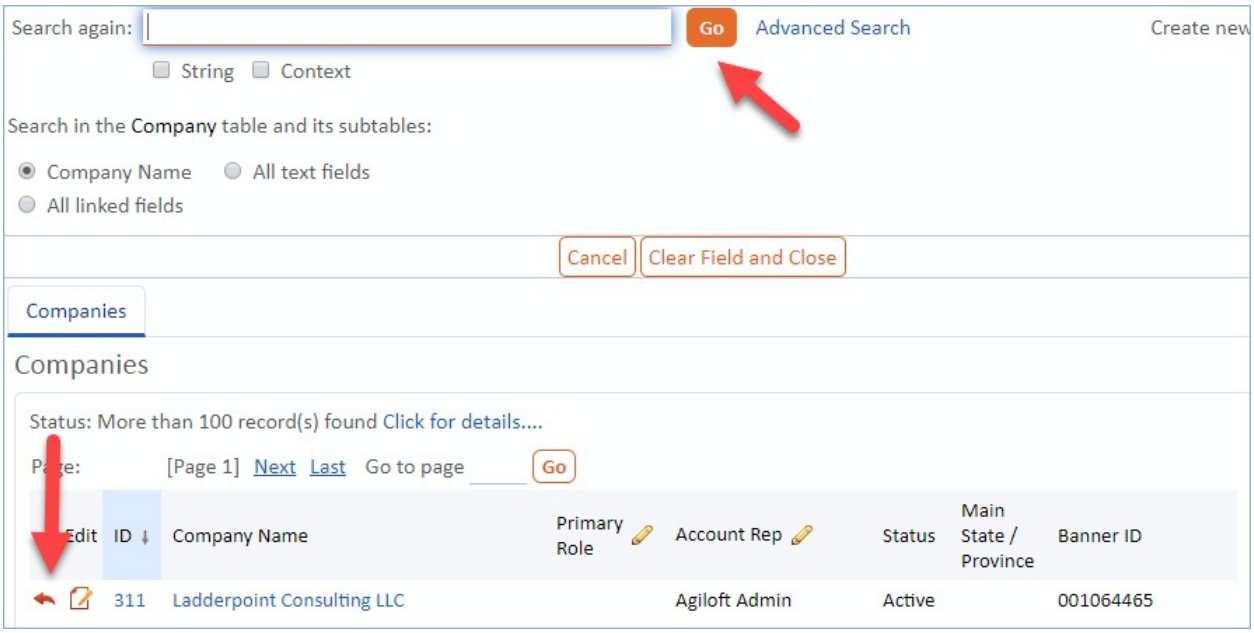
Conditionally Required and Visible Fields

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.

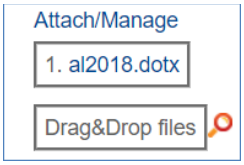


Note that this will often populate multiple detail fields at once.

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.



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.

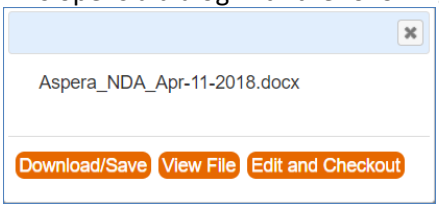
In the attached file dialog, you can indicate whether a document requires an eSignature. With the SLU CMS, all documents should be signed with DocuSign.

This places the document into a state where it must be processed through DocuSign e-signing. For more information, see DocuSign Signatures.

Direct File Editing

Depending on permissions and the status of contract requests, some Microsoft Word files in the CMS can also be edited directly and saved without having to re-upload them manually.

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:

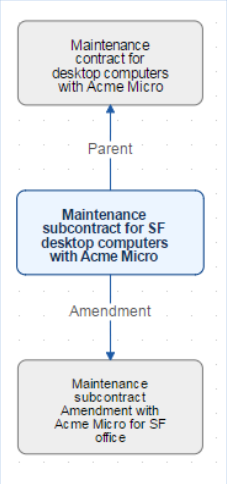


   a. **Download/Save** – downloads the file to your desktop where you must open, edit and re-upload it manually.
   b. **View File** – opens the file in view mode. Click Enable Editing to edit it, and re-upload it manually if needed.
   c. **Edit and Checkout** – opens the file in edit mode. Saving the 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 your left pane, 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 left pane 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.

Banner and BilikenBuy are still the systems of record for SLU. Agiloft checks daily for new companies from Banner and imports them into the system for your use. New companies that you may add to Agiloft do NOT automatically get added to Banner or BilikenBuy.

Editing Companies and Contacts

Sometimes when you receive a contract request it will have the Contract Party Entry marked as New Company. This happens when the requester cannot find the company in the system and instead has submitted the new company information. There is not an integration with Banner or Workday, so a new entry will need to be submitted if not found during the search process.

To search to see if the company is in the system already you can change the Contract Party Entry radio button to Existing Company and use the magnifying glass next to Company Name to lookup existing companies.

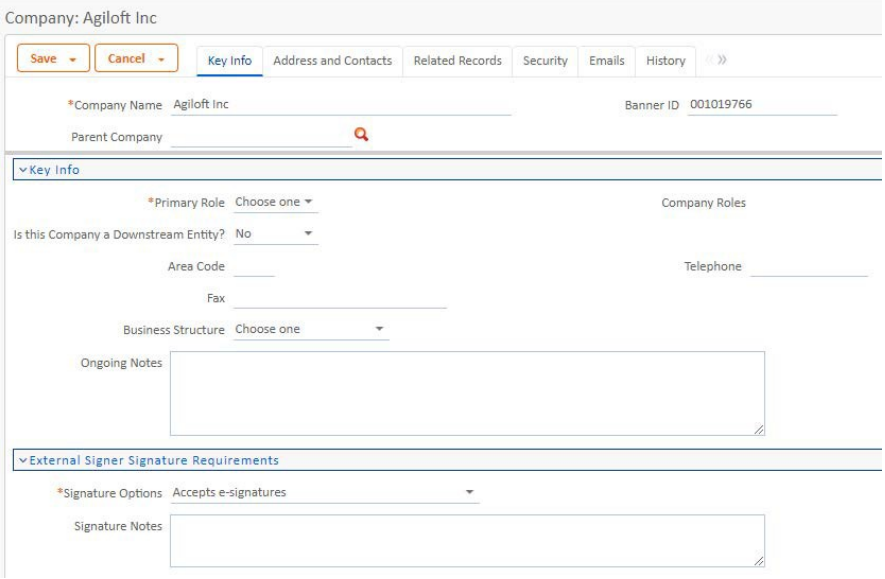
Once you've established that the company record doesn't already exist and the new company information is valid, you can create the new company record by clicking Create Company.

If you want to edit any information about an existing company, such as contacts or company name, you can open the record by clicking on the hyperlinked Company Name.

From within the company record you can edit the company name and other key information such as their role, website, signature requirements, and contact details.

The Company form's Address and Contacts tab contains embedded views for the People / External Users table, and allows you to complete the following actions:

1. Create a new Contact by clicking the New dropdown and choosing External User.
2. Edit an existing Contact by clicking Edit on the existing Contact record.

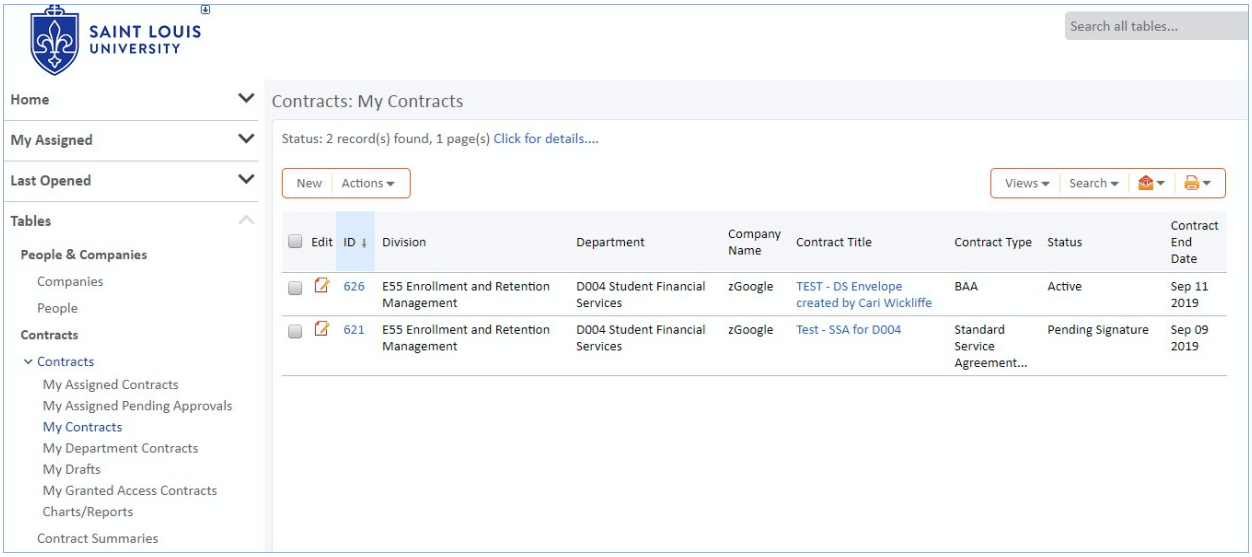


There is a drop-down menu in the company record that indicates the following vendor signature preferences: Does not accept e-Signatures (requires wet Signatures aka pen and ink), Internal (SLU) e-signature accepted, but not internal, Accepts e-signatures (for both parties). This information is also shown on the contract signature tab for reference.

Contracts

The Contracts table is the main processing area you will use in the system to create and manage your contracts. The Contract Management Group in general has permission to edit all contracts in the system they've been assigned as Contract Manager, as well as view access to BAAs and Affiliation Agreements, and contracts for their own Department. If you belong to more than one Group, your permissions may be different.

Remember, clicking Contracts in the left pane will show you only all the records in the system you're allowed to see, use the **Contracts Summaries** table instead to view a list of all university contracts.



Saved Searches

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

Search	What the search shows…
My Assigned Contracts	CM is the selected Contract Manager or is the Responsible Party, and the status is in process (everything before active but draft and canceled.)
My Assigned Pending Approvals	Contract status is Pending Approval, I'm the approver, or am on the approval team and there's no specified approver, or I'm one of the Department Approvers for this approval, or it's pending approval by the CMs for this dept.
My Contracts	I'm the Requester or the Responsible Party.
My Department Contracts	All contracts for the Contract Manager's own Department, as well as any other Departments I've been granted view access to via my Employee record by admins. Also includes all contracts for departments assigned to as a Contract Manager.
My Drafts	Status is Draft and I'm is the Requester or Responsible Party.
My Granted Access Contracts	All contracts for which I've been granted special access via Employee record – additional Business Units, Divisions, or Departments OTHER than my own. Also includes Contracts for which I've specifically been named as having view access – this would expose confidential contracts.

Search	What the search shows…
My Assigned Contracts	CM is the selected Contract Manager or is the Responsible Party, and the status is in process (everything before active but draft and canceled.)
My Assigned Pending Approvals	Status is Pending Approval, I'm the approver, or am on the approval team and there's no specified approver, or I'm one of the Department Approvers for this approval, or it's pending approval by the CMs for this dept.
My Contracts	I'm the Requester or the Responsible Party.
My Department Contracts	All contracts for the Contract Manager's own Department, as well as any other Departments I've been granted view access to via my Employee record by admins. Also includes all contracts for departments assigned to as a Contract Manager.
My Drafts	Status is Draft and I'm is the Requester or Responsible Party.
My Granted Access Contracts	All contracts for which I've been granted special access via Employee record – additional Business Units, Divisions, or Departments OTHER than my own. Also includes Contracts for which I've specifically been named as having view access – this would expose confidential contracts.

The Processing Contracts section walks through some of the elements you will encounter in the various tabs in this table.

Contract Summaries

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

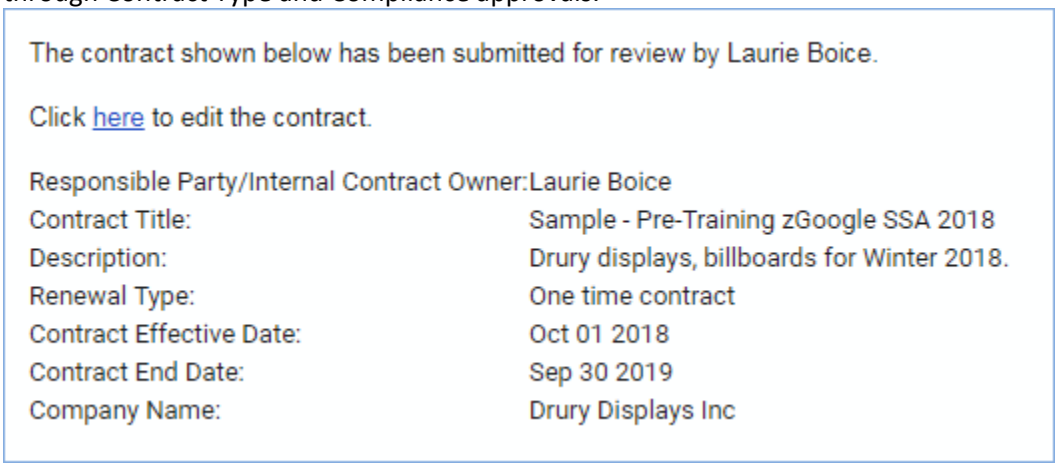
If you have permission to see further into those contracts, you'll be able to click on a link within the Contract Summaries record to take you into the actual Contract record.

Summary of Contract Management in the SLU CMS

This guide runs through the steps of reviewing 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 assigned to you based on the prepopulated Business Unit, Division, and Department assignments.

You will…

1. Receive an email notifying you that a requester has submitted a contract for your review. Initially, this information is for notification purposes only because the contract first routes through Contract Type and Compliance approvals.



The contract shown below has been submitted for review by Laurie Boice.

Click here to edit the contract.

Responsible Party/Internal Contract Owner:	Laurie Boice
Contract Title:	Sample - Pre-Training zGoogle SSA 2018
Description:	Drury displays, billboards for Winter 2018.
Renewal Type:	One time contract
Contract Effective Date:	Oct 01 2018
Contract End Date:	Sep 30 2019
Company Name:	Drury Displays Inc

2. If an approver requires changes, you will receive a notification and you can act on that instruction to make the changes, and send it back to the approver for review. The status of the contract will be Pending Contract Manager because it requires changes.

A change has been requested for contract #593 ID:[omujv2/2070/861] Inbox ×

do-not-reply-slucontracts@agiloft.com
to careytestagiloft+sluadmin

An approver has requested a change for contract #593, described in more detail below. Please click here to review the approval record.

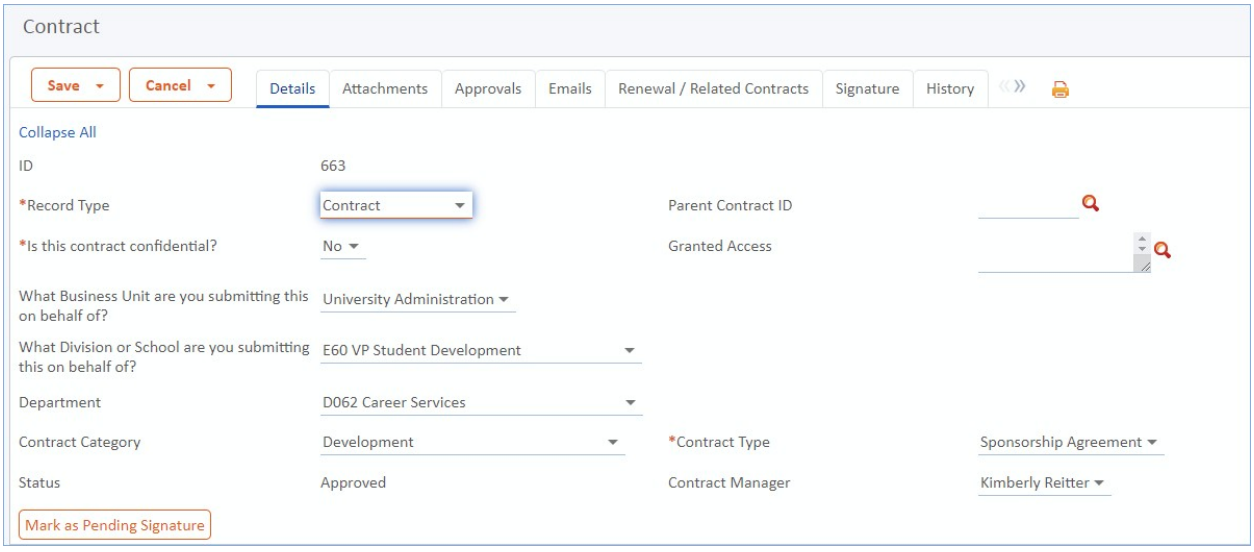
ID:	861
Status:	Requires Change
Contract ID:	593
Date First Approved/Rejected:	Sep 22 2018 11:08
Approved/Rejected By:	Agiloft Implementer

3. Once all initial approvers have approved the request, you will receive a notification that your approval and review as Contract Manager is required. The contract will also be listed in the My Assigned Pending Approvals search in your left pane.
4. When the contract is ready for Contract Manager review, double check the information provided in the Contract record on the Details tab, and review the Compliance Intake Questions to make sure the appropriate parties have been identified and completed their reviews. Create the company and contact as required if the requester did not do so.

5. Use the Emails tab to communicate with the requester or approver over any changes. You will receive email notifications of any new communications, and these messages are saved to the CMS. Communicate with the responsible party to get their affirmation, if it has not already been received.
6. If needed, edit the contract using Microsoft Word and the "Edit and Checkout" feature. Changes will automatically be saved in the CMS.
7. Use the Email tab as needed to email the third party requested changes.
8. If you think the contract request requires additional approvers, add them on the Approval tab at the appropriate step number (before or after Department Approvers).
9. When contract is in final status (successfully approved by all the initial approvers, and it passes your own review), approve your own approval record. This will automatically launch Department-level approvals and any additional approvals necessary for the contract before signature.
10. As with the initial approvals, handle any changes required by the Department–level and adhoc approvers.
11. When all changes and approvals are complete, and the responsible party has given their affirmation, edit the Word document to accept all changes and stop tracking, create the DocuSign Envelope, and send it out for signature.

Overview of Contract Tabs

The Contract form is divided into tabs across the top, each of which is grouped into sections to organize the information:



Details Tab

The Details tab shows you basic information about the Contract, including what part of the University it's for, who requested it, who's responsible for it, the contract term, counterparty, and all of the important legal and compliance questions that determine who the contract must route to initially.

Special Fields for Contract Manager

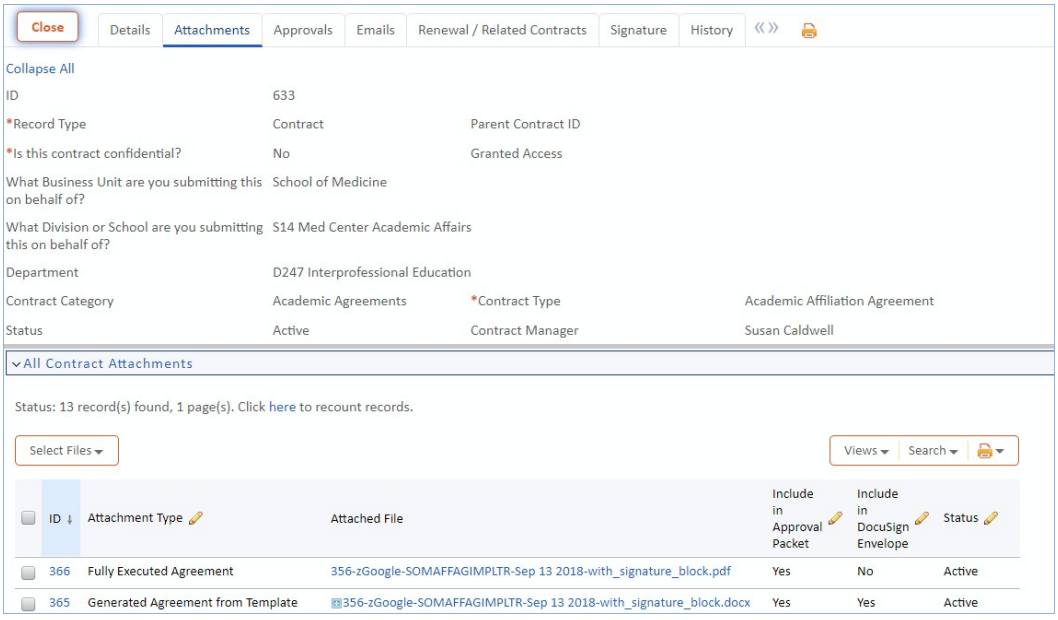
Some fields are not visible to the Requester, but are to the Contract Manager and should be noted:

- Granted Access – used to grant individuals access to this contract. This can be used for confidential contracts, when you need to ensure that particular individuals have view access to it.

Attachments Tab

The Attachments tab shown below is used to manage contract documents and makes use of print templates to generate standard forms out of the fields in the current contract. Documents can also be uploaded directly to the File Upload field on the Details tab, which is an attached file field, and allows you to define the document type.

All attachments linked to this contract appear in the Contract Attachments related table on the Attachments tab.



1. You can upload additional files by dropping them into the File to Upload field on the Details tab, choosing an attachment type and clicking the **Add File** button. If you choose a file to replace it will mark the previous file as Superseded.
2. You can also add files via the Attachments tab. The Action Bar appears at the top of most tables in the SLU CMS and allows you to complete actions on the records in the table. In this case the action bar performs actions on the related Attachments table that has been embedded in the record. The choices available to you depend on your group permissions, but the most common actions are:
    a. **New** – create a new Attachment record - you can also do this by dragging them into File to Upload.
    b. **Unlink** – remove the attachment from the record; this is safer than deleting it because an admin can bring it back later if it was unlinked by mistake.
    c. **Save Changes** – saves any unsaved changes made to the records in the table view below during quick edit, but it does not save the Contract record.
3. You can edit/view attachments by clicking on their filename. For Word files this will open a popup with the following options:
    a. **Download/Save** - downloads the file onto your desktop.
    b. **View File** - opens the file in Word but will not be editable.
    c. **Edit and Checkout** - opens the file in Word and saves any changes made there back into the SLU CMS upon saving the file in Word. For all other attachment types the file will be downloaded onto your desktop.
4. The table shows the list of all attachments. When a file is ready to be sent for signature you can mark it Yes for Include in DocuSign Envelope. This is a quick edit field.

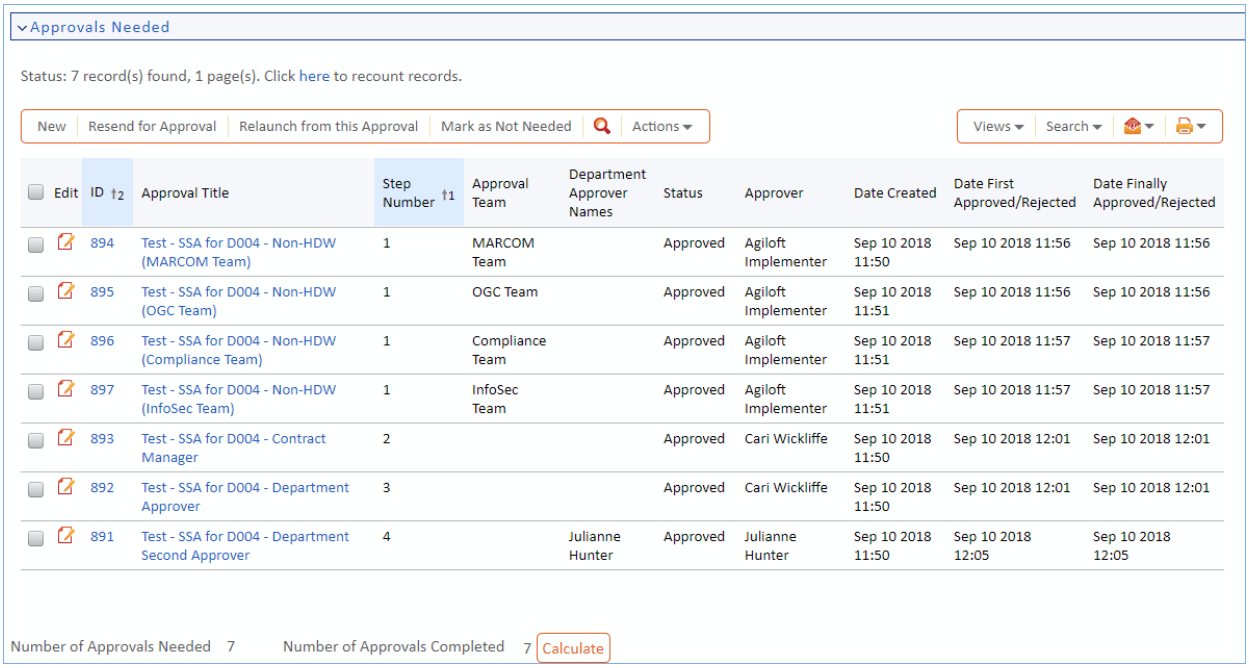
Attachment records have specific attachment types. An explanation of these types is below:

Attachment Type	Description
Document Ready for Approval	Requesters can attach documents of this type if they require approval.
Supporting Document	Any Supporting Documents can by uploaded under this type.
Insurance Certificate	For Insurance Certificates.
Document Provided by Outside Party	Documents provided by outside parties can be uploaded under this type. This type is also used when people outside of the system email documents to the contract record.
Fully Executed Agreement	This attachment type is used by the document that comes back from Adobe Sign signing.
Generated Agreement from Template	Attachment has been generated automatically from a template. These will be included in most requests.

Approvals Tab

In the SLU CMS, Intake and Contract Type approvals will automatically be generated and launched when the requester submits the contract for review.

If necessary, the Contract Manager can generate additional approvals on an adhoc basis. The approvals can be seen in the related table of Approvals Needed, shown below:



Approvals Needed

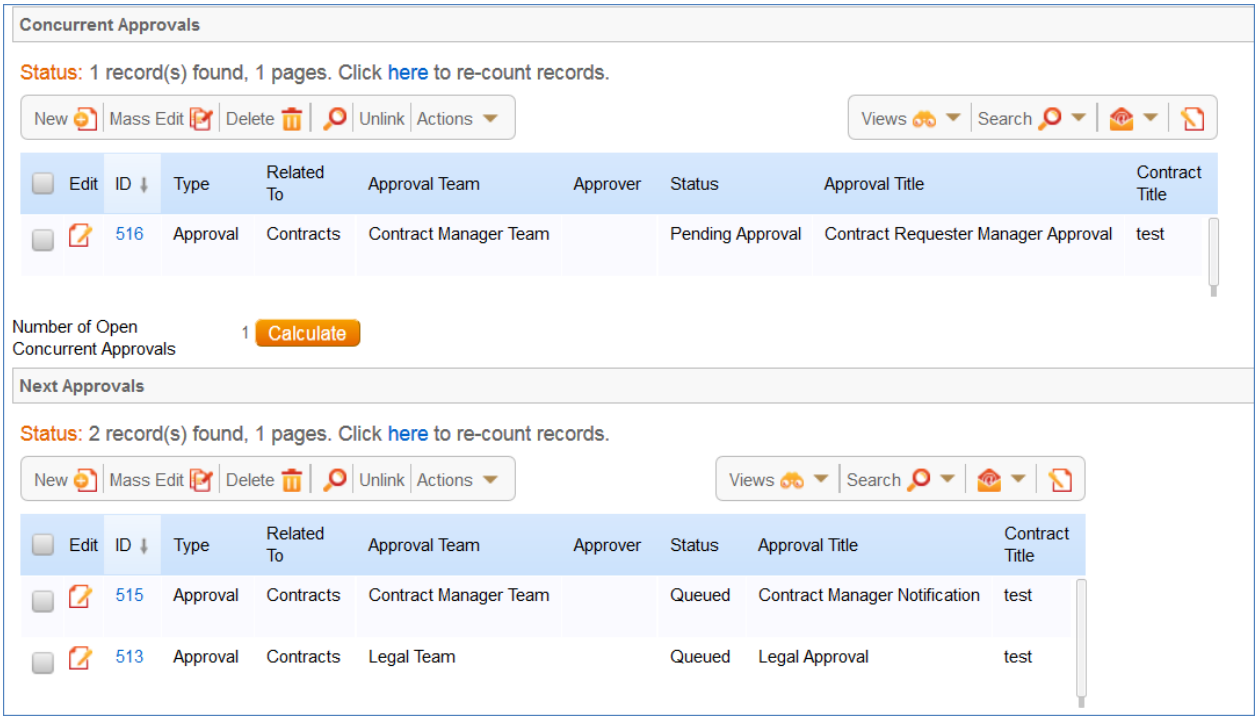
Status: 7 record(s) found, 1 page(s). Click here to recount records.

New | Resend for Approval | Relaunch from this Approval | Mark as Not Needed | Actions | Views | Search

Edit	ID	Approval Title	Step Number	Approval Team	Department Approver Names	Status	Approver	Date Created	Date First Approved/Rejected	Date Finally Approved/Rejected
	894	Test - SSA for D004 - Non-HDW (MARCOM Team)	1	MARCOM Team		Approved	Agiloft Implementer	Sep 10 2018 11:50	Sep 10 2018 11:56	Sep 10 2018 11:56
	895	Test - SSA for D004 - Non-HDW (OGC Team)	1	OGC Team		Approved	Agiloft Implementer	Sep 10 2018 11:51	Sep 10 2018 11:56	Sep 10 2018 11:56
	896	Test - SSA for D004 - Non-HDW (Compliance Team)	1	Compliance Team		Approved	Agiloft Implementer	Sep 10 2018 11:51	Sep 10 2018 11:57	Sep 10 2018 11:57
	897	Test - SSA for D004 - Non-HDW (InfoSec Team)	1	InfoSec Team		Approved	Agiloft Implementer	Sep 10 2018 11:51	Sep 10 2018 11:57	Sep 10 2018 11:57
	893	Test - SSA for D004 - Contract Manager	2			Approved	Cari Wickliffe	Sep 10 2018 11:50	Sep 10 2018 12:01	Sep 10 2018 12:01
	892	Test - SSA for D004 - Department Approver	3			Approved	Cari Wickliffe	Sep 10 2018 11:50	Sep 10 2018 12:01	Sep 10 2018 12:01
	891	Test - SSA for D004 - Department Second Approver	4		Julianne Hunter	Approved	Julianne Hunter	Sep 10 2018 11:50	Sep 10 2018 12:05	Sep 10 2018 12:05

Number of Approvals Needed 7 Number of Approvals Completed 7 Calculate

Once all approvals in the first step are approved, the next step approval(s) are set to Pending Approval. A table of all Concurrent Approvals (those with the same Step Number) are shown in the second tab of an approval record, Related Approvals. All approvals in the next step of the workflow are shown in the table of Next Approvals.



Concurrent Approvals

Status: 1 record(s) found, 1 pages. Click here to re-count records.

New | Mass Edit | Delete | Unlink | Actions | Views | Search

Edit	ID	Type	Related To	Approval Team	Approver	Status	Approval Title	Contract Title
	516	Approval	Contracts	Contract Manager Team		Pending Approval	Contract Requester Manager Approval	test

Number of Open Concurrent Approvals 1 Calculate

Next Approvals

Status: 2 record(s) found, 1 pages. Click here to re-count records.

New | Mass Edit | Delete | Unlink | Actions | Views | Search

Edit	ID	Type	Related To	Approval Team	Approver	Status	Approval Title	Contract Title
	515	Approval	Contracts	Contract Manager Team		Queued	Contract Manager Notification	test
	513	Approval	Contracts	Legal Team		Queued	Legal Approval	test

Approvers can click Approve or Require Changes in their assigned approvals:

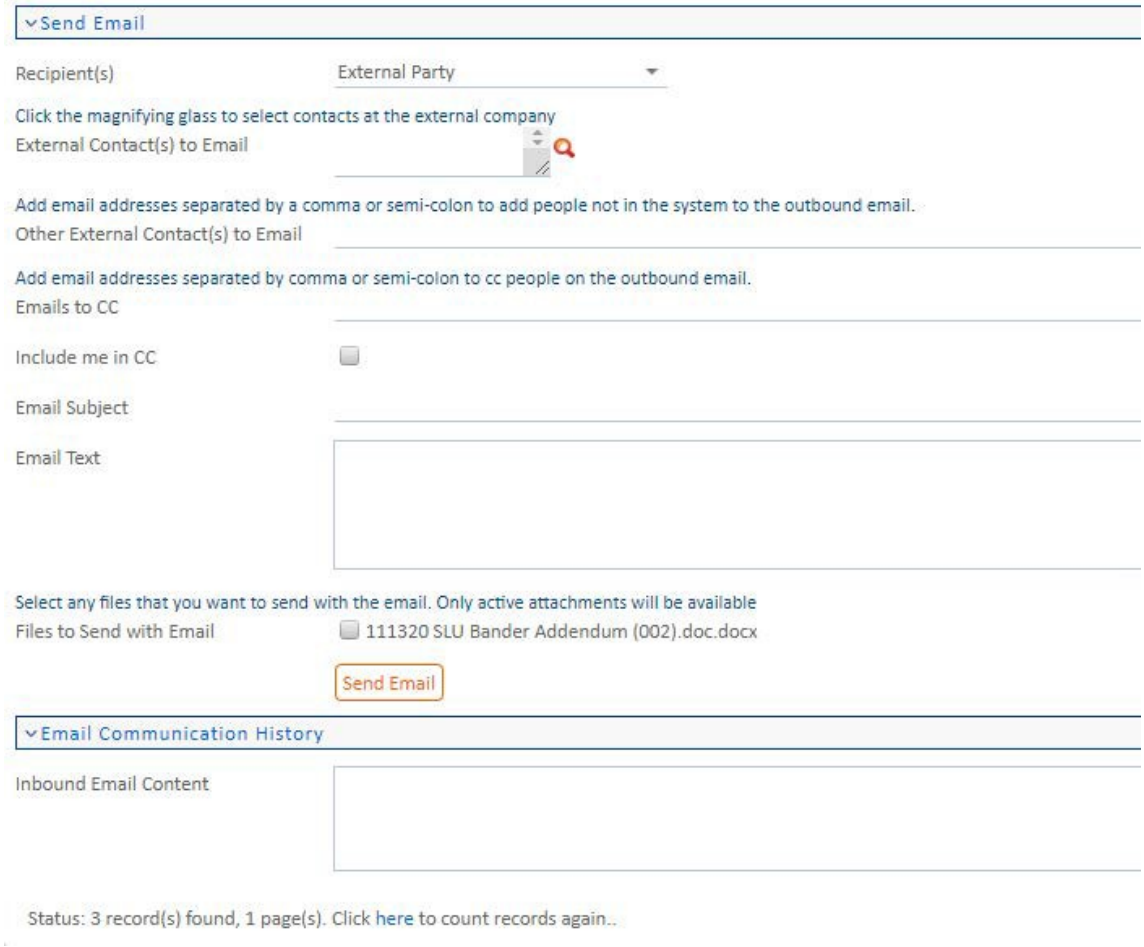
To click Require Changes the approver must first add to the Approval Notes. If the approver decides to require changes, the approval's Status is set to Requires Changes and the contract is set to Pending Contract Manager. All other approvals can still proceed if they've been launched; after the Contract Manager handles the required changes, the contract manager can determine whether the entire process needs to be relaunched.

Once all approvals have been approved, the contract's Status is set to Approved.

Emails Tab

The Emails tab shown below allows you to perform various email-related actions:

1. Emails can be sent to External Contacts, Internal Contacts or both. The list of external contacts is based on the contacts at the contracting company.
2. Use the include me in cc checkbox to receive the response in your Outlook inbox as well.
3. You can type the subject line and body into the Email Subject and Email Text fields.
4. Select the active attachments you want to include with the email.
5. The Send Email button sends the email. When someone replies to the email the Contract Manager and Responsible Party are notified. Any documents contained in the reply will be put into the Attachments tab.
6. Email Communication History displays a list of all emails sent and received by this contract record.



Renewal / Related Contracts Tab

The Renewal/Related Contracts tab manages all related contracts to the current one, as well as contract renewals when the contract end date has expired.

Contract Renewals

When setting up contracts, you can choose the following renewal types:

- **Auto-renewing** – this will send a notification when the specified number of days before the contract expiration date arrives. If you do not cancel the renewal, it will automatically generate a copy of the contract with the specified monthly term of renewal.
- **Notify staff to renew** – this will send a notification when the specified number of days before the contract expiration date arrives. The contract owner should then log in and manually review and renew the contract.
- **Evergreen** – this contract has no expiry date and needs no renewal.
- **One-time contract** – this will not be renewed after the end date expires.

To create a contract renewal, in the Renewal / Related Contracts tab click the Create Renewal Contract button.

This will generate a copy of the contract record that you can review, change as necessary, and save. The two records will be linked and shown in the Previous Contract for which this is a Renewal section.

Related Contracts

A single contract may generate multiple related contracts. These are related as parent-child subcontracts or amendments. Related contracts have the following restrictions:

- The contract Status must be Active, Canceled, Expired, or Signed.
- The related contract type must not be the same as the current contract. This is to enforce the parent/child relationships between contracts.

In the Renewal / Related Contracts tab, select a related contract type and click Create Related Contract.

A new contract opens, and you can add the details as necessary and send it through approvals. All related contracts will be shown in the Related Contracts and Amendments section.

The Diagram field is a Relationship Diagram which allows you to view and navigate to any related contracts.

Canceling a Contract

You can set the Status to Canceled to avoid getting reminder emails about it. If no further action is required, you can also simply click the **Cancel Contract button** on the details page. This button is only functions once a contract has been saved and while in edit mode.

Signature Tab

The Signature tab below manages all signatures required to process a contract through DocuSign electronic signature integration.

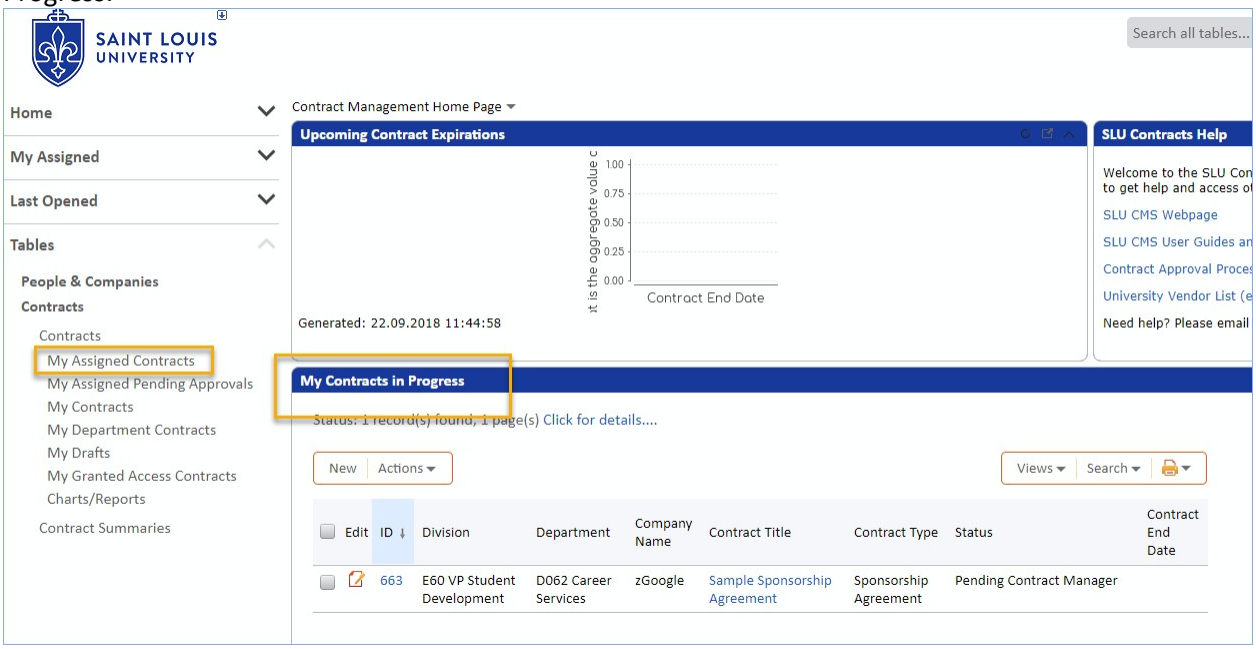
1. You cannot send the contract for signature before the status is Approved, and other validation rules run to ensure that the contract request is ready for signature.
2. The Files to Sign field shows the document that will be sent via DocuSign. You must change the DocuSign indicator to YES for any files to include for signature before creating the envelope.
3. Click Create DocuSign Envelope to generate a new envelope for signing the document. For more information on envelopes and the DocuSign e-signing process, see Preparing for Signature.

Processing Contracts

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.)

You will need to act upon the contract in two scenarios:

1. At least one of the approvers requires changes, so the Contract's status is "Pending Contract Manager." You will receive an email notification that your action is required. The contract will appear in your My Assigned Contracts search and on your Home page in My Contracts in Progress:



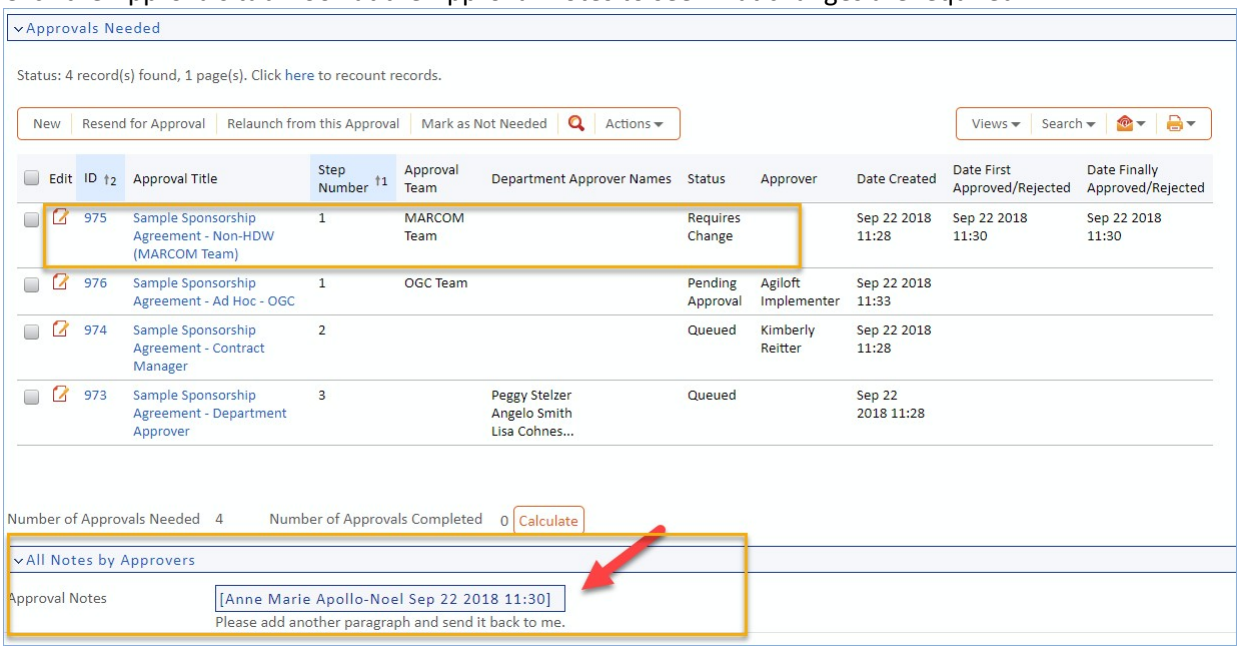
2. The approvers have all approved the request, and it's your turn to finalize everything before sending it to the Department Approver.

The following sections detail how to review the request and make required changes.

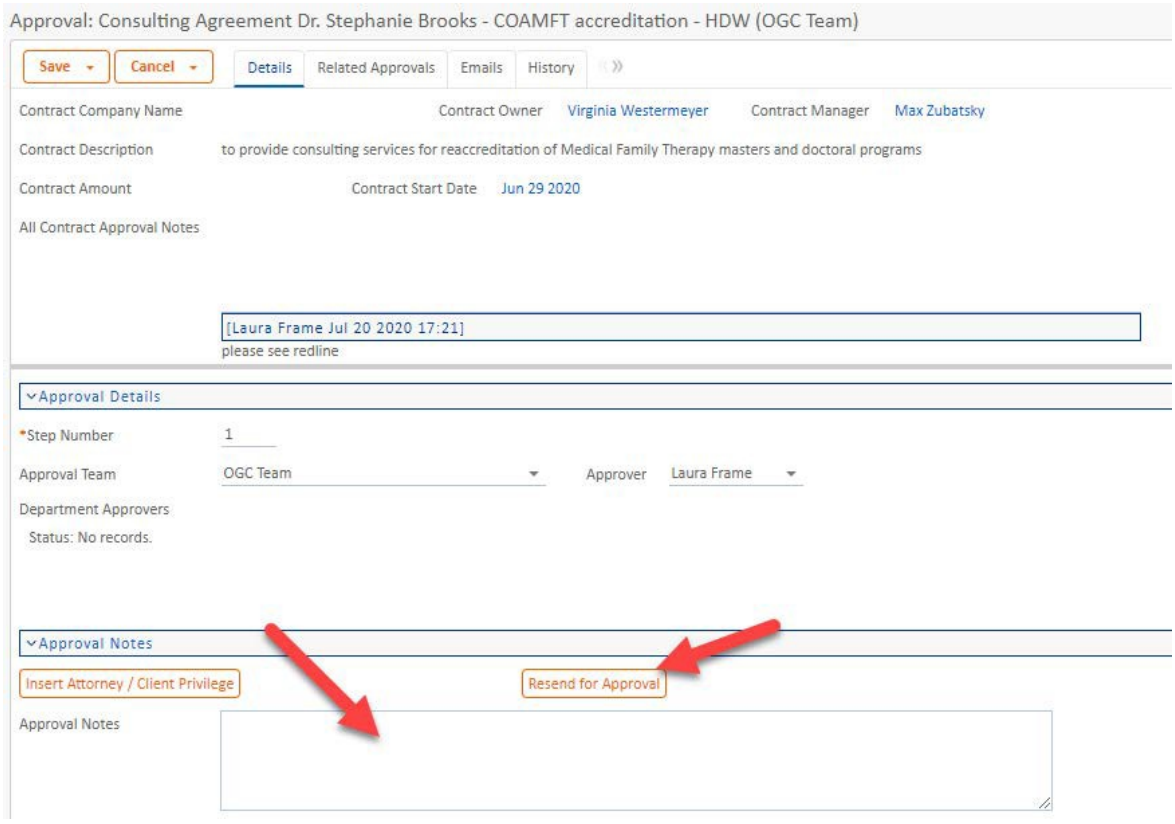
Handling Required Changes

1. Open the Contract by clicking the Edit icon.

2. Click the Approvals tab. Look at the Approval Notes to see what changes are required:

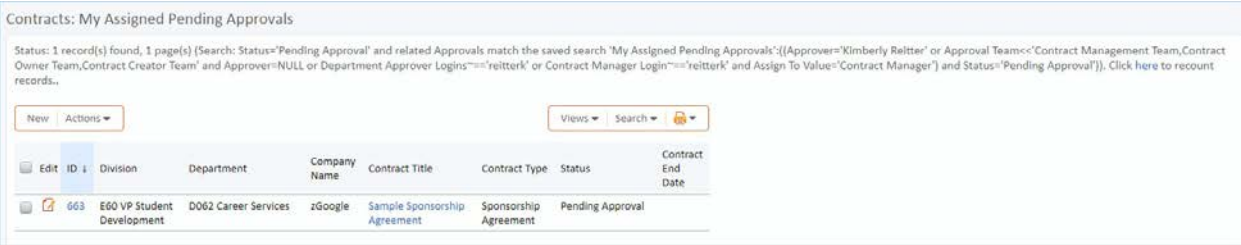


3. Make the changes to the contract as required by negotiating with the other party.
4. Open the approval record in edit mode, add specific notes in the approval notes section indicating what was done to satisfy the changes requested, then click the “resend for approval” button which sets the approval status back to pending. The approver may also approve instead of waiting for the resend action by the contract manager.



Review the Request – Contract Manager Approval Step

Once the initial approvals have been received, the Contract Manager step will be Pending Approval. You will be notified via email, and will find the contract in My Assigned Pending Approvals:



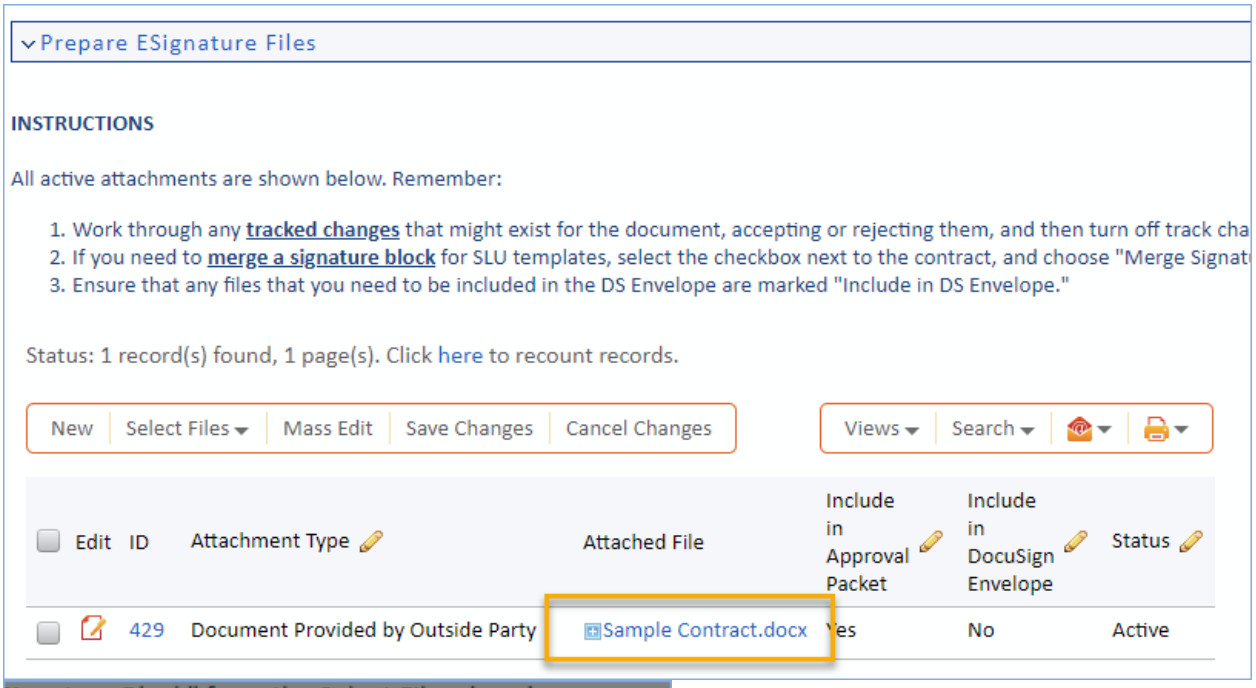
If you were not the original requester, follow these additional steps:

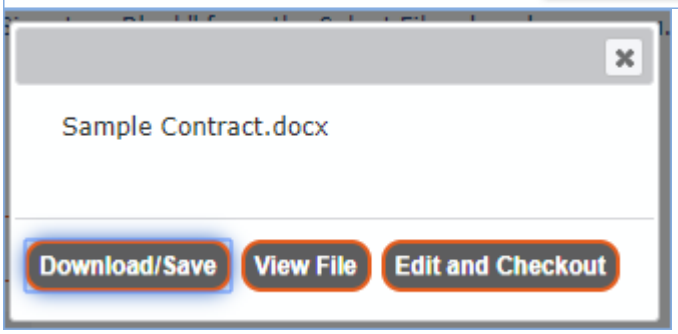
1. Click the Edit icon to open the request.
2. Check each section on the Details tab for accuracy.
3. Go to the Attachments tab. Click the name of the contract document and choose Edit and Checkout. Compare the contract document to the responses on the Compliance Intake questions.
4. If any responses there are inaccurate, fix the responses and create any additional approvals that are needed.

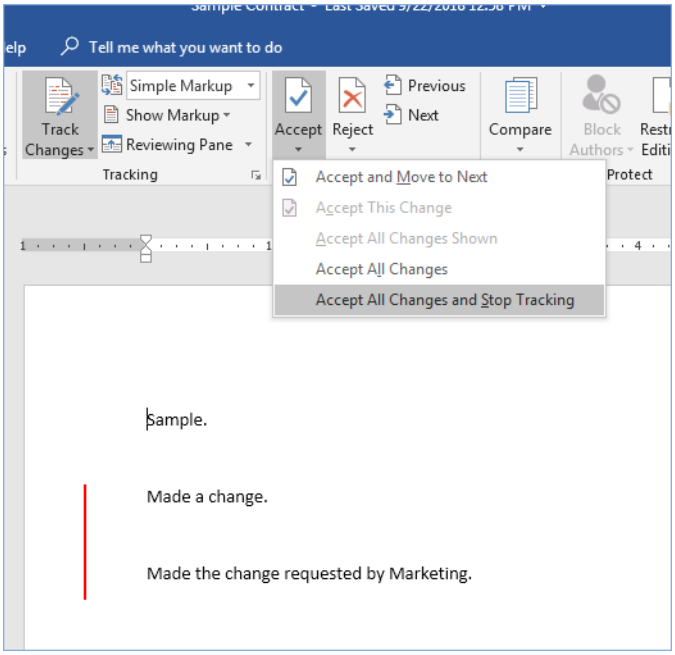
If you find any changes are needed in the contract document based on the approver notes, ensure track changes is on, and make the changes.

Use the email tab to send the redlined document to the 3rd party for review, attaching the contract document(s) as required.

Once the response is received, work through any remaining tracked changes in the document and turn off tracked changes. If it's an Agiloft template, you will need to Unlock Track Changes by going to Review > Track Changes > Lock Tracking, and enter the password "slu" (all lowercase). Accept or reject changes; accept them all and stop tracking by choosing Accept > Accept all changes and stop tracking. Save the Word file and close.


Prepare ESignature Files
INSTRUCTIONS
All active attachments are shown below. Remember:
1. Work through any tracked changes that might exist for the document, accepting or rejecting them, and then turn off track cha
2. If you need to merge a signature block for SLU templates, select the checkbox next to the contract, and choose "Merge Signat
3. Ensure that any files that you need to be included in the DS Envelope are marked "Include in DS Envelope."
Status: 1 record(s) found, 1 page(s). Click here to recount records.
New
Select Files
Mass Edit
Save Changes
Cancel Changes
Views
Search
Edit
ID
Attachment Type
Attached File
Include in Approval Packet
Include in DocuSign Envelope
Status
429
Document Provided by Outside Party
Sample Contract.docx
Yes
No
Active

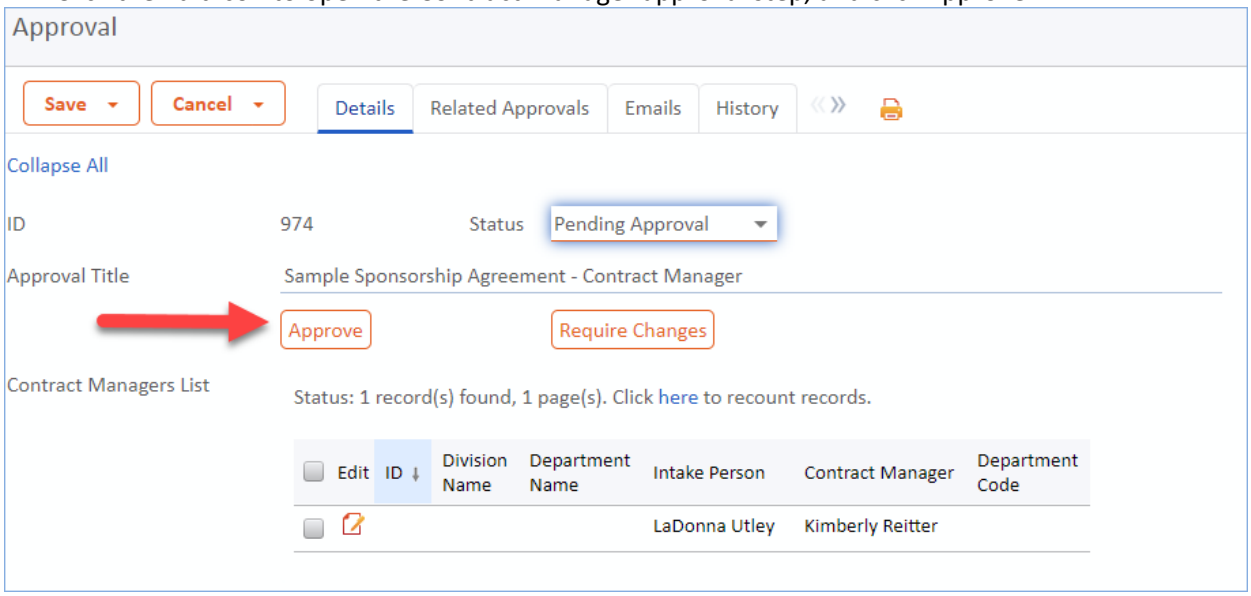

Sample Contract.docx
Download/Save
View File
Edit and Checkout


Tell me what you want to do
Track Changes
Simple Markup
Show Markup
Reviewing Pane
Tracking
Accept
Reject
Previous
Next
Compare
Block Authors
Protect
Accept and Move to Next
Accept This Change
Accept All Changes Shown
Accept All Changes
Accept All Changes and Stop Tracking
Sample.
Made a change.
Made the change requested by Marketing.

Sending on to Department Approvers

Once you have completed the steps to review the contract request, negotiate, and create a clean copy, you're ready to move the request forward to the Department Approver(s).

1. Click the Approvals tab.
2. Click the Edit icon to open the Contract Manager approval step, and click Approve:

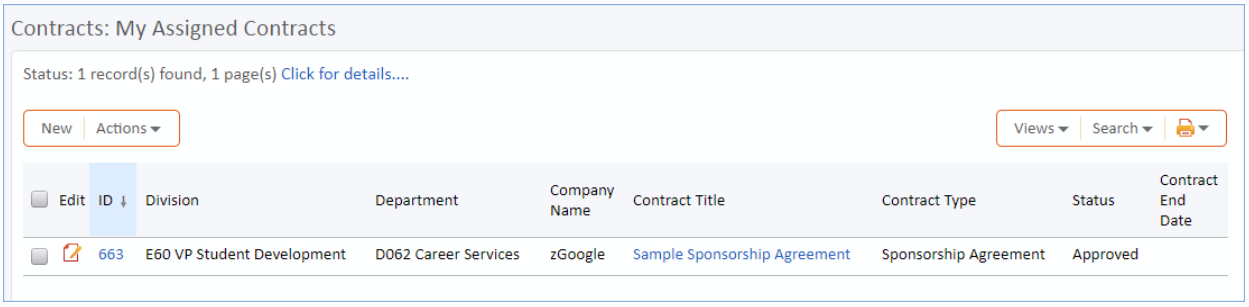


In the Approvals Needed related table, you'll now see that the Department Approver step has shifted to "Pending Approval," and the Department Approver(s) notified via email.

The Department Approver(s) will review the request just as the initial Contract Type and Compliance Approvers did, and you can resolve in the same way.

Preparing for Signature

When the Department Approver(s) and any Ad Hoc approvals you may have created are all Approved, you will receive an email notification and the Contract Status will be Approved:



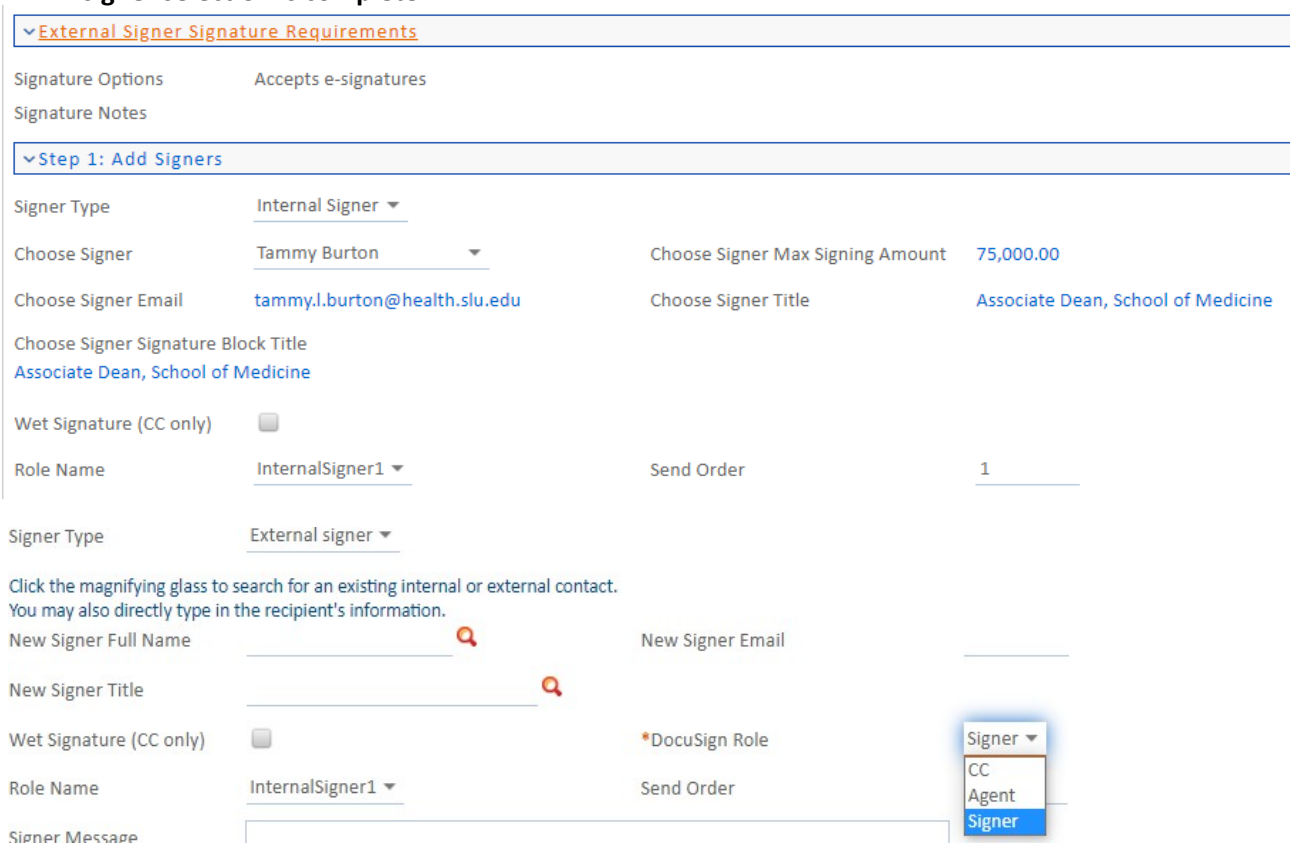
At this point, you're ready to route the contract for signature.

The document must be signed by any users listed in the Internal Signers and Counterparty Signers sections of the Details tab. The internal list will eventually be automatically populated based on a number of factors, including the Business Unit, Division/School and Department selected, as well as potentially the dollar amount of the contract.

For this first phase, you must specify all signers.

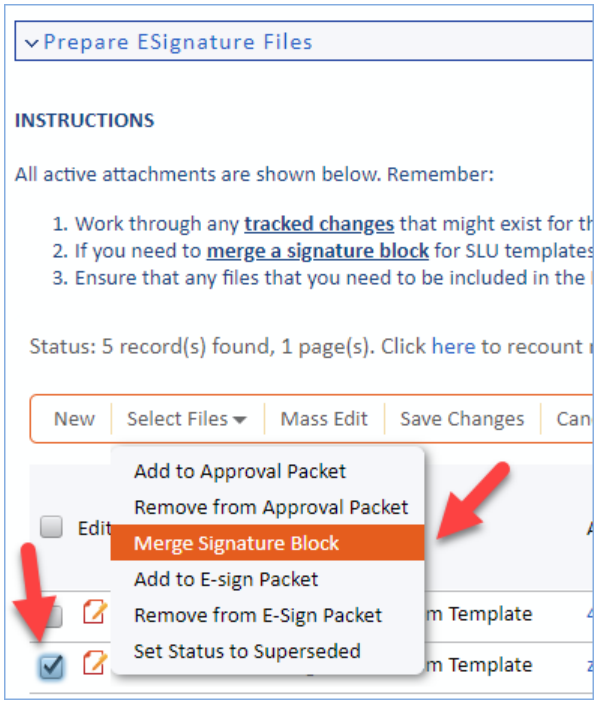
1. Click the Signature tab. Add as many signers as you need using the Add Signer section Step 1.

   Use the magnifying glass lookup to find users already stored in the People table, or you can manually type in their Name, Title, and email address. Send Order controls the order in which DocuSign routes the envelope for signature. Each signer must have a different role name. Ensure theSLU signer is InternalSigner1, and 3rd party signers are Customer role names and choose a DocuSign Role. Add a custom message to each if desired, noting the internal approval summary is sent to SLU signers by default. **Click the Add Signer button after each signer selection is complete.**

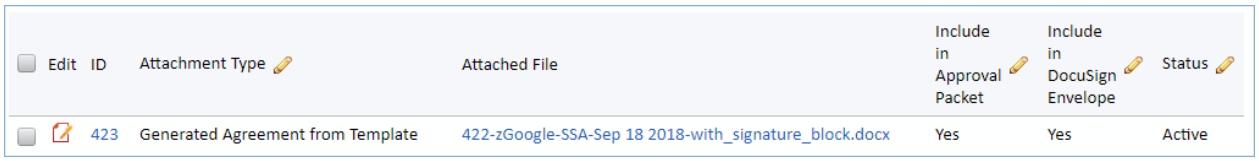


2. For the external signer, more about DocuSign roles:
   - Signer (default): Most common role used, this person will e-sign the agreement or choose to reassign to someone else by using the “actions” menu in the DocuSign envelope: click here for procedures.
   - CC: individual will receive a copy to download, no further action is required on their part
   - Agent: can be used when a contract is sent to a representative but not the signer. This person will be responsible for updating their signer’s name and information upon receipt. The envelope creator must add a third role once in the DocuSign envelope for the “authorized signer” and place the relevant tags for that role.
3. Now it's time to prepare the Contract document itself. Click the blue hyperlinked Attached File and choose Edit and Checkout. This will save your changes directly to the Word file on the server:

If the contract was generated in Agiloft (such as the SSA or the Affiliation Agreement templates) you will need to merge the signature block page. Click the box to the left of the contract document to be signed, hover over Select Files, and choose Merge Signature Block:



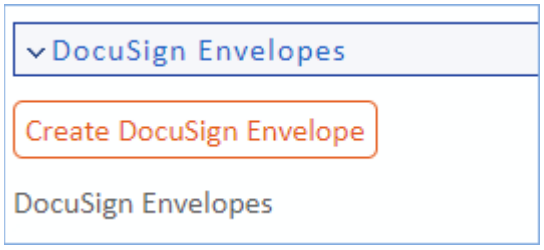
1. This will create a new attachment record of the contract, now with a signature block included. It will automatically be marked to be included in the DocuSign Envelope:



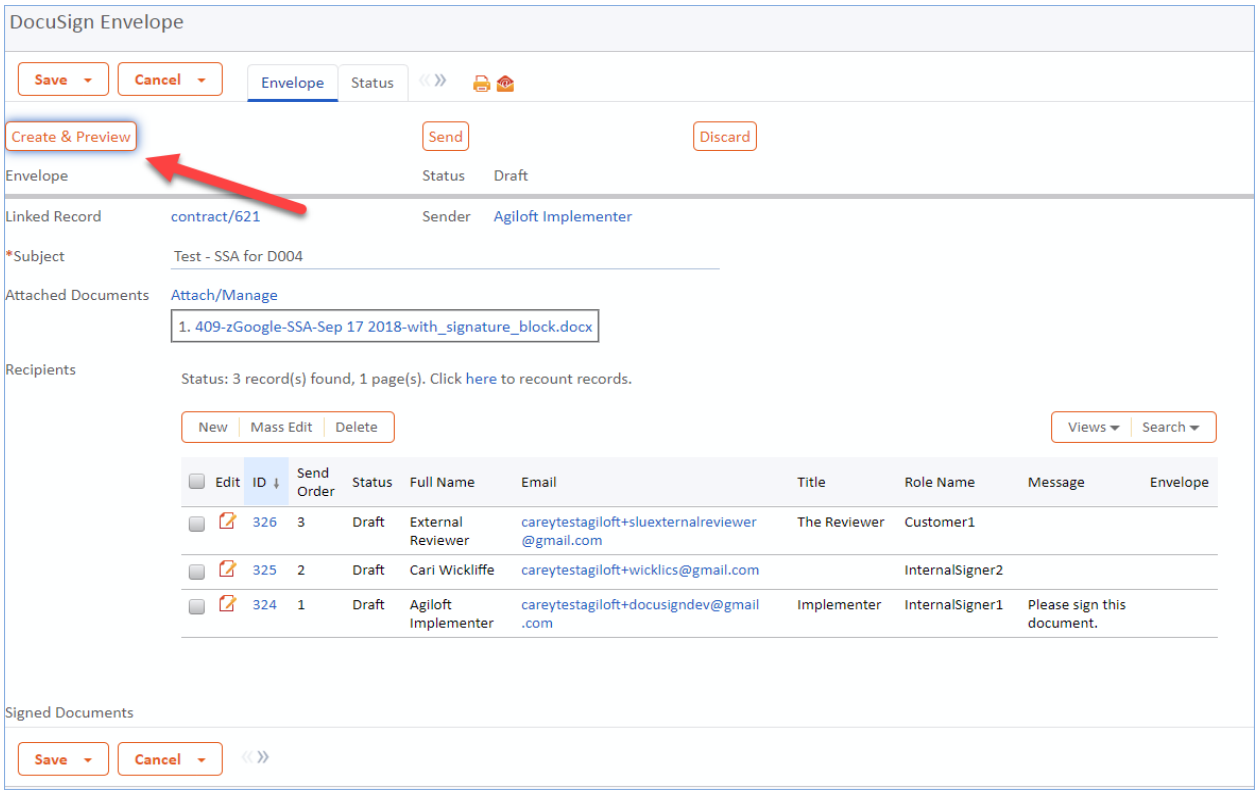
Edit	ID	Attachment Type	Attached File	Include in Approval Packet	Include in DocuSign Envelope	Status
	423	Generated Agreement from Template	422-zGoogle-SSA-Sep 18 2018-with_signature_block.docx	Yes	Yes	Active

2. Adjust any other attachment records as necessary using the Quick Edit field "Include in DocuSign Envelope." Any filesthat you want to be included in the envelope must be set to Yes. Once you've done that and saved each entry, click Refresh Files to show the Files that will be included in the envelope:

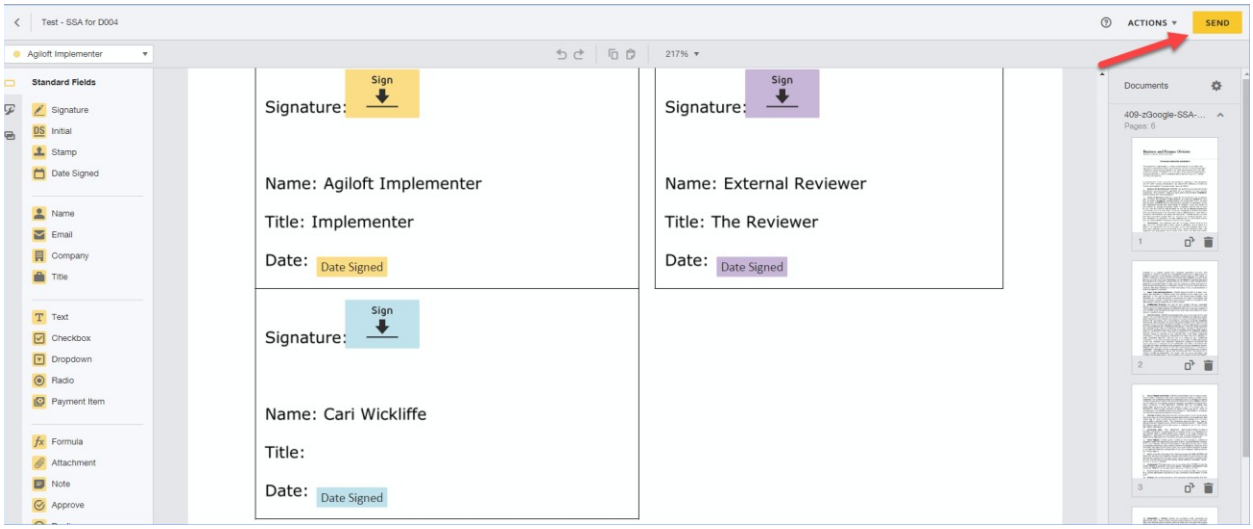
3. Click Create DocuSign Envelope:



3. The DocuSign Envelope form will display, showing the Internal and External Signers you entered as DocuSign Recipients, along with the file(s) that will be included in the envelope. Click Create and Preview:



4. You will be taken to the DocuSign in a pop up window (make sure pop ups are enabled), where you can see the contract document and drag in the signing tags. Use the controls on the left to drag in additional tags; if you're using a contract generated from an Agiloft template, tags will be in place already for you.



5. When you're ready, click Send.

Status Changes

DocuSign will handle emailing all of the recipients, and will notify you as well when they're sent and signed. Docusign will also send status updates to Agiloft so that from within the CMS you can see where the envelope is in the process.
When an envelope is sent the contract status will change to Pending Signature.

The recipients will get an email notification from DocuSign that the documents need to be signed off by them, and they can click the link in their email to access and sign the document.

When the document is fully signed it will be added to the Attachments tab, the status will change to Signed, and an email will be sent to the Contract Manager and Responsible Party. If the contract is set to become active on date of last signature, the contract start date will be set automatically when the signed document comes back from DocuSign and become Active. Otherwise, once the contract reaches its start date the status will change to Active.

Additional Resources

Several tutorial videos located at our website at http://www.agiloft.com/tutorials.htm demonstrate how to set up saved searches, charts and reports, manage the table views, and do other day–to-day work with the system. We highly recommend watching a few of these videos to learn how to navigate the system most efficient.