Approving in Contracts+ – Capital Programs

Approving a Contract

The Contract Office will create a contract in Upside and attach the 2^{nd} party signed contract which may require several approvals depending on the metadata entered.

A Contract Approver must review and take action on the pending Contract in the approval queue they are assigned to.

Contract Approval Queues:

- Department Level
  - Finance Approval Que
    - All Contracts/Change Orders/Amendments
  - Director Approval Queues
    - Professional Services Contracts - ALL
    - Construction Contracts - ALL
    - Change Orders/Amendments - > $50K
  - Executive Director Approval Queues
    - Professional Services Contracts - ≥ $100K
    - Construction Contracts - > $500K
    - Change Orders/Amendments - > $75K
- University Level
  - Legal Approval Queues
    - Professional Services Contracts - None – Completed in Upside
    - Construction Contracts - None – Completed in Upside
    - Change Orders/Amendments - ALL
  - AVP Approval Queues
    - Professional Services Contracts - ≥ $250K
    - Construction Contracts - > $1M
    - Change Orders/Amendments - ≥ $100K
  - Chief Legal 2 Approval Queues
    - > $250K for Professional Services Contracts, Construction Contracts, Change Orders/Amendments
  - President (SAP) Approval Queues
    - > $250K for Professional Services Contracts, Construction Contracts, Change Orders/Amendments
  - Comptroller Approval Queues
    - AVP – Mike Wilson
      - Professional Services Contracts - < $1,000,000
      - Construction Contracts - < $2,500,000
      - Change Orders/Amendments - All $ amounts
    - SAP – Mike Bass
      - Professional Services Contracts - ≥ $1,000,000
      - Construction Contracts - ≥ $2,500,000
      - Change Orders/Amendments - Back-up to AVP

Step-by-Step

1. Navigate to **Contracts** > **Approvals** > **Contracts to Approve**.
2. [Recommended] To prevent another approver within the approval queue from approving the contract at the same time, select the checkbox next to the item you are approving and select **Assign to Myself** from the dropdown menu in the top right corner of the table. Then click **Go**.
3. Click the **Contract Number** to open.
4. Review the contract.
5. [Optional] During the approval process, the Communication Center allows the approver to request more information from the Contract Administrator or respond to a question/comment entered by the Contract Administrator. See the *How to Use the Contract Communication Center* section below.
6. Click **Contract Actions** and from the dropdown menu and select the appropriate action.

Contract Actions Menu

- **Assign to Myself**: Assigns the contract to you to prevent another approver from approving the contract at the same time.
- **Approve/Complete**: Moves the contract to send it to the next step in the workflow.
- **Reject**: **DO NOT USE THIS ACTION UNLESS YOU WANT CANCEL THE CONTRACT.** Allows users to reject the contract and it will no longer be able to be edited unless certain actions are taken. Use **Return to Draft** if you want to have updates/edits made to the contract.
- **Return to Draft**: Allows users to return the contract to the Contract Office to make updates and resubmit.
- **Return to Shared Folder**: Used to return the contract to its shared approval folder where another approver within the queue can review it. This option is only available if you have assigned the contract to yourself.

How to Use the Contract Communication Center

The **Communication Center** of a contract is used to manage correspondence about a contract from one central location in Contracts+.

Add Internal Message Step-by-Step

The **Add Internal Message** contract action is used to send communications from a contract. It is displayed on all contract pages of contracts in any status. The messages and their replies are saved and can be accessed from the contract's Communication Center.

1. Navigate to **Contracts** > **Contracts** > **Search Contracts**.

1. Open the contract you want to send an email from.
2. In the top right corner of the page, click **Contract Actions** and select **Add Internal Message**. The Internal Communication window opens.
3. Enter a line describing the message in the **Subject** field.
4. Type the message text in the **Body** field.
   a. **NOTE:** You can use formatting options to modify the appearance of the text and add links and placeholders.
5. Enter the user names of any desired recipients in the **Recipients** field.
6. [Optional] In the **Attachments** section, upload an attachment from a local drive on your computer by clicking the **Add Attachments** button. Select the files you want to attach and click **Done**.
7. Click the **Create** button.
   a. **NOTE:** The message is sent to recipient(s) and the conversation is added the Communication Center page.

View a Conversation Step-by-Step

The **Communication Center** of a contract is used to monitor correspondence about a contract from one central location in Contracts+.

- **Communication Center** – Clicking **Communication Center** in the left menu of a contract opens a page with tabs for internal and external communications. The lists on these pages include all the internal and external communications that have been sent via the Add Internal Message and Start External Communication contract actions. Columns show when the conversation started, the number of messages (responses) in the conversation and the last update.

- **Conversation Details** – Clicking on a conversation row opens a second page that shows the original communication and all replies, the recipients, and any attachments included.

1. Navigate to **Contracts** > **Contracts** > **Search Contracts**.
2. Open the contract with the email conversation you want to view.
3. Click **Communication Center** in the left menu. The Communications Center main page opens.
4. Search for the conversation you want to view. Columns show when a conversation started, the number of messages (responses) in the conversation and the last update.
5. To view all messages in a conversation, click anywhere in the row of the communication you want to view. The Conversation Details page opens. It shows the original communication text and all replies, the recipients (subscribers) and their email addresses, and any attachments included in the communication. In the **Subscribers** section, active subscribers are displayed in blue text, and those who have unsubscribed are displayed in gray text.
6. (optional) In the **Conversation Details** page, you can:
    a. Click on a name to view the email address of a recipient.
    b. Click the **Change Subscribers** button to add, edit or remove subscribers (recipients) in a conversation. See Manage Email Subscribers, below.
    c. Click the **Add to Conversation** button to send a reply to all recipients in the conversation.
    d. Click the **Actions** > **Compare With** option next to each reply that has an attachment. It allows you to compare attachments received via email to the latest version of contract documents in the **Attachments** page.