

UNIVERSITY OF ILLINOIS

Office of Business and Financial Services
University Office of Capital Programs & Real Estate Services

USING UPSIDE CONTRACT

Reference Guide

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Introduction

Upside Software

Configuration · Help

Home · Contracts

Upside

Saved Views: ContractsByProjectCode

Search Configure

Project Code:

	Notifi...	Contract Nu...	Contractor	Contract Type	Status	Org Unit	State	Created Date	Description
➔		U-1	Felmley-Dickerson Co.	CON - Contractor With Assigned S...	Pending Director App...	UTUC Capital Planning	Active	10/16/2009	U06076 - PAR Hall - I
		U-10	Felmley-Dickerson Co.	LTR - Notice of Award	Executed	UTUC Capital Planning	Active	10/19/2009	U06076
		U-11	Felmley-Dickerson Co.	LTR - Notice to Proceed	Executed	UTUC Capital Planning	Active	10/19/2009	U06076
		U-12	A & H PLUMBING & HT...	LTR - Notice of Intent to Award	Executed	UTUC Capital Planning	Active	10/19/2009	U06076
		U-13	Felmley-Dickerson Co.	LTR - Notice of Award/Proceed	Executed	UTUC Capital Planning	Active	10/19/2009	U06076
		U-15	DeStefano and Partne...	CON - Front End Documents	Edit Mode	UTUC Capital Planning	Active	10/19/2009	U06076
		U-17	DeStefano and Partne...	PSA - Short Form	Edit Mode	UTUC Capital Planning	Active	10/19/2009	U06076
		U-2	DeStefano and Partne...	CON - Front End Documents	Edit Mode	UTUC Capital Planning	Active	10/16/2009	U06076 - PAR Hall - I
		U-3	A & H PLUMBING & HT...	CON - Assigned Subcontractor	Edit Mode	UTUC Capital Planning	Active	10/16/2009	U06076 - PAR Hall - I
		U-4	Felmley-Dickerson Co.	CON - Contractor With Assigned S...	Executed	UTUC Capital Planning	Active	10/19/2009	U06076
		U-5	DeStefano and Partne...	PSA - Standard Form	Executed	UTUC Capital Planning	Active	10/19/2009	U06076
		U-7	DeStefano and Partne...	CON - Front End Documents	Executed	UTUC Capital Planning	Active	10/19/2009	U06076
		U-8	A & H PLUMBING & HT...	CON - Assigned Subcontractor	Executed	UTUC Capital Planning	Active	10/19/2009	U06076

Upside Contract Project Contracts Listing (for a UIUC Project)

UOCP&RES selected **Upside Contract** to replace the Contract Document System (CDS). The purpose of the change is to increase compatibility with other capital systems and make system integration possible.

Upside Contract and its companion software, **Upside Forms**, allows end-users to provide necessary contract information through simple forms-based data entry. Users can review contracts in **Upside** or through a PDF preview. Initial contract document review and approval will occur electronically. Final wet signatures are still required.

Professional Services firms can no longer view or edit documents. By the end of 2009, CDS was phased out. Except for contracts already started in CDS, Campus Construction Units generate all new contract documents within **Upside** as of January 1, 2010.

Upside software allows for creation, approval, and management of all capital-related contract documents, including Professional Services agreements, Front End Documents, letters to professional services consultants, construction contracts, letters to contractors, such as Notice of Award, Notice of Intent to Award, and Notice to Proceed, along with an internal approvals workflow.

A set of worksheets and forms are available from the UOCP&RES website for information on appropriate form input in **Upside**.

Get Started

You will need to logon to **Upside** using your Enterprise Application Services (EAS) logon and password. If you do not have an Enterprise ID or understand the EAS logon system, see the next section.

Log On to Upside

1. Navigate to www.uocpres.uillinois.edu.
2. Land on the **Applications** tab.
3. Select the **Upside Contract** option.
4. Enter your production EAS credentials.

Enterprise Application Login



The screenshot shows the 'Enterprise Application Login' page for the University of Illinois. At the top, the university's name and logo are displayed. Below this, the title 'Enterprise Application Login' is centered. The main section contains two columns. The left column has a warning: '(Important: DO NOT include "@uillinois.edu", "@uic.edu", "@uic.edu" or "@uic.edu" when entering your EnterpriseID)'. Below this are input fields for 'EnterpriseID' and 'Password', followed by a 'Login' button. The right column is for 'ATTENTION: FIRST-TIME USERS' and includes a 'First Time Users' button. Below the login fields are two boxes: 'Change Your Password' with a link 'If you know your password, but would like to change it' and 'Forgot Your Password?' with a link 'Click here to reset your password'. At the bottom, contact information for the AITS Service Desk is provided, including phone numbers and an email address.

Establish Your EnterpriseID & Password

To confirm that you have a valid EnterpriseID and password, log into the Employee Self Service application. If you've successfully logged in, there's nothing more to do. You will be able log into **Upside** using your EnterpriseID.

Your EnterpriseID and NetID are separate, as are the passwords associated with the IDs.

If you do not know your EnterpriseID or are unsure if you have an EnterpriseID, visit:
https://www.aitis.uillinois.edu/access/get_access/get_access_to_enterprise_applications/

You must know your Bluestem ID or NetID to logon and establish an EnterpriseID. Follow the instructions under the **Obtain your Enterprise ID** section. This process will use Bluestem to assist you in setting your password. You will be supplying your Bluestem NetID and password to set your Enterprise password.

NOTE: This process does NOT update your Bluestem password.

Change or Reset Passwords

If you have an EnterpriseID and know your password, but would like to change it, visit http://www.aits.uillinois.edu/access/get_access/ and select the **Change Your Passwords** link.

If you have forgotten your EnterpriseID password, you may also reset it in this section. This process uses Bluestem to update your Enterprise password.

NOTE: This process does NOT update your Bluestem password.

Support

Troubleshoot Log On:

1. Try resetting your Enterprise ID password as explained above. If that does not work, continue to step 2.
2. Call the AITS Service Desk. Since you will use your Enterprise ID as your **Upside** logon, only AITS can help reset this password.

AITs Service Desk

UIC: (312) 996-4806
UIS: (217) 333-3102
UIUC: (217) 333-3102
Email: servicedesk@uillinois.edu

3. If resetting your password does not solve the problem, call the AITS Service Desk and log an initial request for Upside Support.
4. If you are able to logon to **Upside** but get an error once you are there, please call UOCP&RES and ask for Upside Support.

AITs Service Desk

The focus of the AITS Service Desk is handling questions about administrative systems, accounts and passwords. It can also assist with basic PC desktop issues and direct users to appropriate campus or departmental resources for problems with networks or business processes.

E-mailing AITS will generate a case in **Clarify**, their problem tracking system. You will receive an automated response with a case number for reference on any follow-up.

The AITS Service Desk is staffed from 7:00 AM to 5:00 PM, Monday through Friday. Outside of these hours, calls are forwarded to the AITS Network Operations Center, enabling them to provide client support 24 hours-a-day, seven days-a-week. Visit their website at http://www.ait.s.uillinois.edu/get_help/ for more information and frequently asked questions.

If you are experiencing a network problem, call the respective campus Help Desk:

UIC – Academic Computing and Communications Center (ACCC)

Phone: (312) 413-0003

Web page: <http://accc.uic.edu/contact#QUICK-HELP>

UIS – Technology Services Center (TSC)

Phone: (217) 206-7357

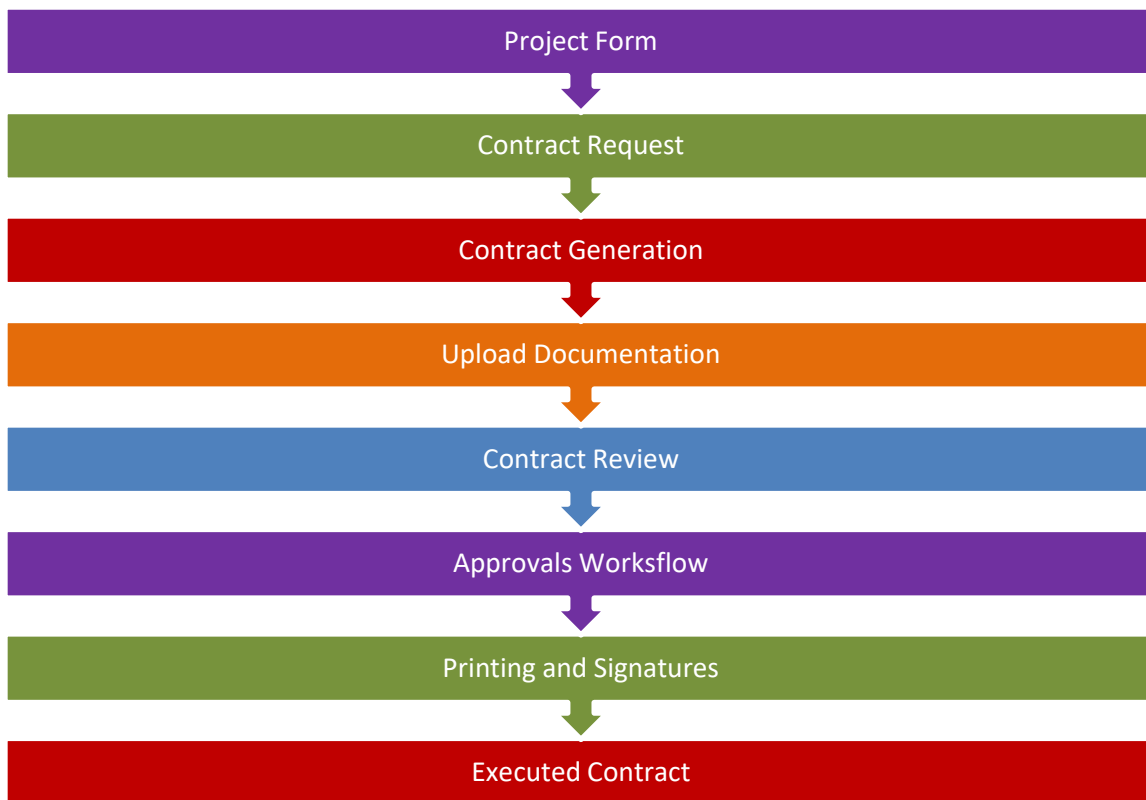
Web page: <http://www.uis.edu/informationtechnologyservices>

UIUC – Technology Services

Phone: (217) 244-7000

Web page: <https://techservices.illinois.edu/get-help>

An Overview of Upside



Purpose

The aging of the internally-developed Contract Documents System (CDS) necessitated an upgrade to a more compatible platform for a new system. **Upside Contract** was selected and customized for the University's use across all campuses. **Upside** partially automates the creation of contract documents and creates a single location for storage of both the system-generated contract and its signed and scanned fully-executed contract. It also includes the option to bring together other documents, such as certification letters and MAFBE certifications.

Upside currently¹ contains the following templates from which to create advertisements, contract documents, and letters:

- Professional Services
 - Professional Services Advertisement.
 - Professional Services RFP Consultant Advertisement.

¹ Future Upside development may include additional contracts. Future development requirements and schedule have not been determined as of the publication of this guide.

-
- Professional Services Agreement (PSA) with Attachments A-D.
 - Professional Services Agreement (PSA) Short Form.
 - Professional Services Retainer Agreement.
 - Professional Services Amendment.
 - Construction Management Agreement.
 - Construction Management Amendment.
 - Front End Documents.
 - Construction
 - Construction Bid Advertisement.
 - Construction Pre-Bid Meeting Information.
 - Construction Contract – Contractor with No Assignment.
 - Construction Contract – Contractor with Assignment.
 - Construction Contract – Assigned Subcontractor.
 - Letters, including:
 - Professional Services Award Letter.
 - Professional Services Retainer Renewal Letter.
 - Notice of Intent to Award (NOIA) Letter.
 - Notice of Award (NOA) Letter.
 - Notice to Proceed (NTP) Letter.
 - Notice of Award / Notice to Proceed (Combined) Letter.

NOTE: A template contains the document’s boilerplate text, optional text, and field placeholders. When a new contract is generated the user-entered information combines with a copy of the selected contract document template to create the contract.

Elements of Upside Contract Software

Home Page and Dashboard. Upon first logon to ***Upside***, the Home Page will appear, which includes a navigational pane, a menu pane, and a panel of task areas.

Upside Forms and Wizards. Wizards walk the contract creator and editor through the required and optional information necessary for the system to generate contract documents. There are two types of wizards:

- **Project Forms**

Each contract will be associated with information from a Project. Information entered into the Project Forms will feed the automatically generated contract with such standard information as the generating department’s name, campus, and address; the professional services consultant’s name and address; and other formerly repeated information relevant to many contracts.
- **Contract Request Wizard**

The Contract Request Wizard offers selection criteria for the contract creator and subsequently interacts with the Project Form data behind the scenes to create the selected type of contract.

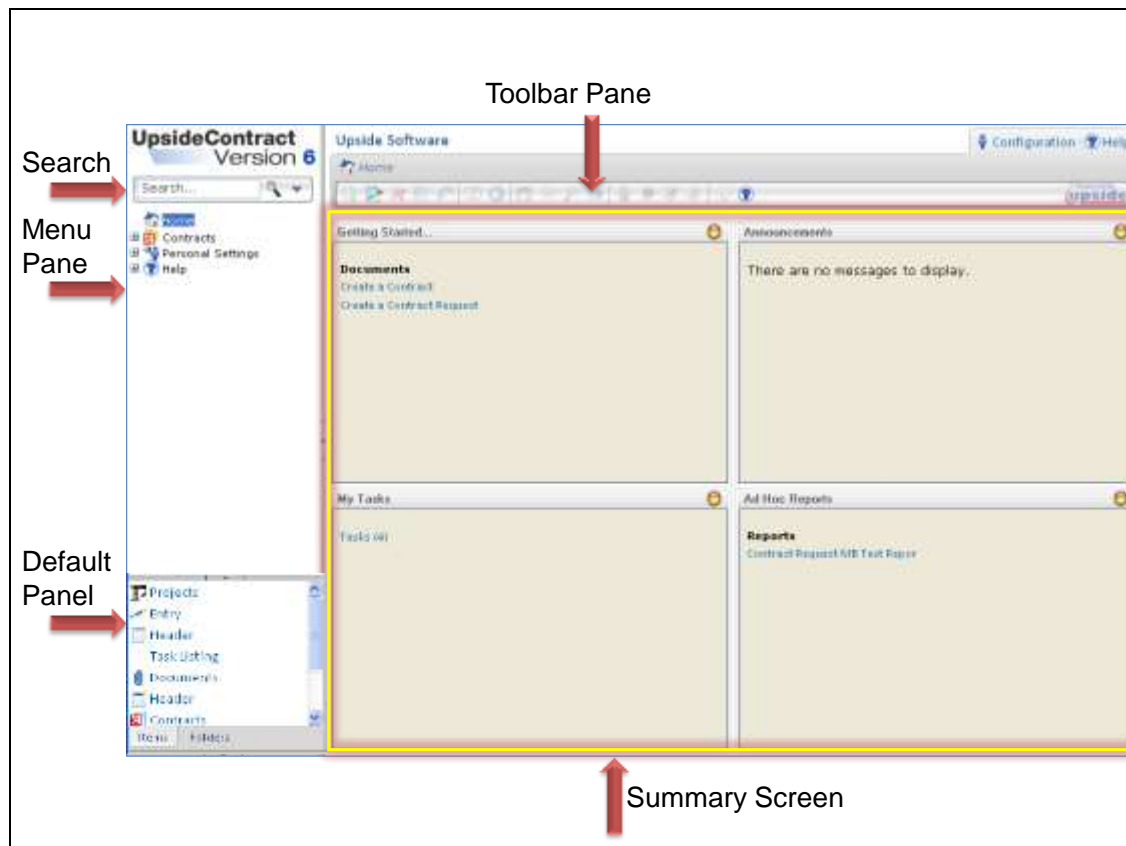
Contract Documents. In addition, contract editors can view the contract documents in their native formats. Professional Services Agreements and Letters may be edited to include elements not available in the wizards.

Document Attachments. *Upside* allows users to upload document attachments, such as prevailing wages and other documents as needed.

Document Review. All contract documents may be converted to PDF format and reviewed and/or forwarded to others for review. Versions of documents may be compared either side-by-side or using inline redlining.

Approval Workflow. Once a contract has been created, it enters an approvals workflow. During the workflow, reviewers and approvers verify the contract's details and certify that they agree that the contract is ready to be printed and sent out for signatures. The contract may not be edited during the workflow approval process, except when modifications have been requested and then only by UOCP&RES.

Upside Software Interface



Elements of the Upside Interface

The Home Page is the first screen that is displayed when logging into **Upside Contract**. It contains several areas that are used to navigate through the application:

The **Global Search** area is used to search through all (or specific areas) of the application for the entered criteria.

The **Menu Pane** contains links to the available areas within **Upside Contract**. The menus displayed are based on the modules that have been purchased by the University of Illinois, as well as on the role you play within **Upside**.

The **Default Panel** contains the recent history of areas and items that you have visited and the Tasks, Documents and Recovered Documents folders of the application.

The **Summary Screen** displays a Dashboard of frequently used task, reports, and announcement items. It contains:

- **Getting Started.** The Getting Started area lists tasks you are authorized to perform, such as create a Contract Request, if you're an editor.

NOTE: On the Summary Screen, in the Getting Started quadrant, you may see the Create a Contract option. Do NOT use this option.

- **Announcements.** The Announcements area displays system announcements and other updates.
- **My Tasks.** The My Tasks area displays a link to a view of the tasks that need to be completed as well as any approvals you have waiting for your review. The My Tasks link will gather together the following types of tasks:
 - Contract Request items that are not finished.
 - Contracts that are in edit mode but not released into the workflow.
 - Approval tasks awaiting your review.
- **Reports.** The Reports area contains links to standard and ad hoc reporting capabilities.

The primary Upside **Toolbar** displays and hides icons in a context-sensitive fashion, depending upon your activities. When working within **Upside**, use the **Upside** toolbar rather than the browser's toolbar.






Navigate the Interface

In addition to the Summary Screen, the Menu Pane, and the Default Panel, the user can navigate **Upside** using the following toolbar icons.

Upside Icons




Buttons used in the browser, such as the Back and Refresh icons, do not apply. **Always use the Back button in the Upside toolbar.** DO NOT USE the Back button in the browser window as it may cause unexpected behaviors and error messages in **Upside**, including data loss from disconnection when forms and contracts were unsaved.









Instead of the browser's buttons, use the following icons to navigate within the application:

Name	Icon	Description
Back		Returns you to the previous screen.
Cancel		Cancels the current action. Like "Undo".
Help		Opens help topics for the application.
Home		Returns you to the home (summary) screen.
Refresh		Refreshes the screen.

Additional Global Icons

The following icons are available as needed and in context, within **Upside Contract** views.

Name	Icon	Description
Add		Add a new item in the selected area.
Edit		Edit/view the selected item.
Delete		Delete the selected item.

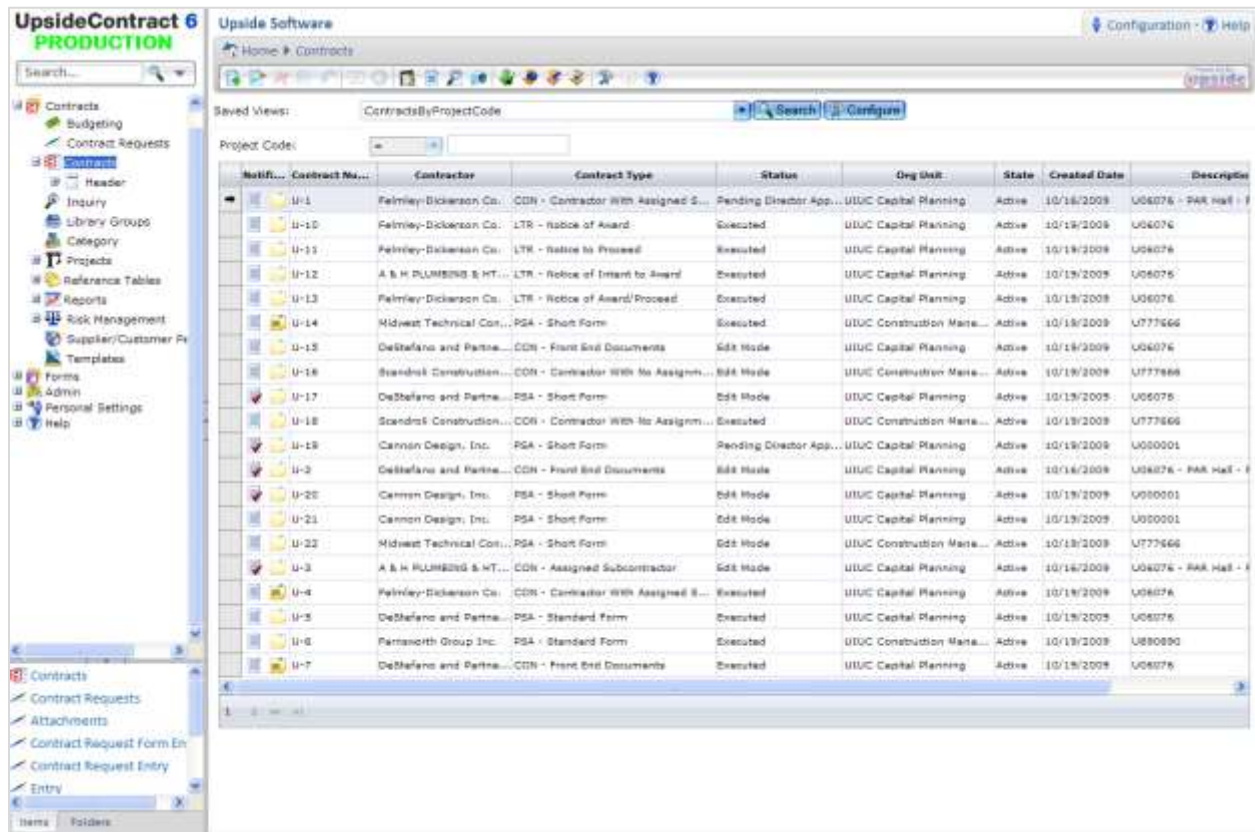
Name	Icon	Description
Save		Save the selected item.
Select		Select an item from a listing screen.
Audit Log		View the history of status changes for the selected item.
Print Preview		Preview the selected item. A window will open from which you can select the format for the preview.
Check Out		Check the selected item out. When a document is checked out to you, it cannot be worked on by any other users.
Check In		Check the selected item back into the repository.
Summary		View a summary page for the selected item.
Add Document to Folder		Opens a menu that shows a list of folders from the Inbox Pane. From the drop-down menu, click a folder to add the selected item to it.

Important Notes

Use Internet Explorer. Because ***Upside Contract*** is a web-based application, you'll need to view it in a web browser. Internet Explorer is the preferred browser. If your default browser is Firefox or other popular web browser, the application may not display correctly. It's safest to bookmark ***Upside*** in Internet Explorer and return to it using only Internet Explorer.

Allow Pop-Up Windows in Upside. To use ***Upside Contract*** effectively, you will need to allow pop-up windows from the entire ***Upside Contract*** web-based application.

Contract Listing View

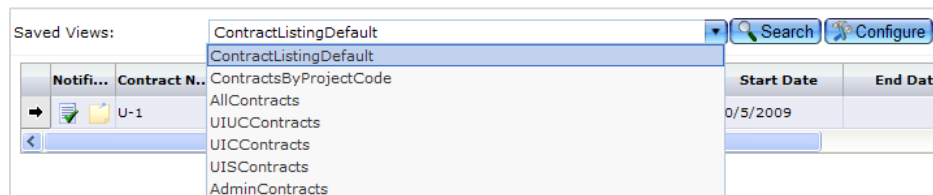


Upside contains useful views for finding and interacting with contract documents as needed.

The Contract Listing View allows the user to view the contracts which exist in the system and to filter that listing to pull together just the contracts desired for viewing. There are a number of filtered views available from a drop-down menu. If sufficient permissions exist, the user may even be able to create a customized filtered view of Contract Listings.

Filter the View

Filter the Contract Listing View using the **Saved Views** drop-down field, as illustrated below. The saved views are also listed below.



The user can also filter the ContractsbyProjectCode view by entering a project number in the **Project Code** field and clicking the **Search** command button.

Provided you have the correct permissions, you can also create your own Saved Search. See the next section, [Saved Searches](#), for the procedure.

Navigate Search Results

Once you have a subset of projects or contracts, you can navigate through multiple pages using the page numbers at the bottom of the listing.

Select a Contract

Click on the desired row in the view. An arrow appears to the left of the item you've selected.

Check-out a Contract Document

In order to work with a contract document, it's wise to check it out. If you have editor rights, you will not be able to edit the contract unless it is checked out. Click the **Check Out** icon in the toolbar.

View Contract Summary Details

To quickly review a summary of a contract, click the **Summary** icon in the toolbar. A new window opens with more detail about the item selected, including any contract notes and workflow approvals the item has undergone.

The screenshot shows a web browser window titled "Uplink Software - Windows Internet Explorer". The main content area displays contract details for a contract with ID "U-1". The details are organized into two columns. The left column includes fields for Parent Contract No., Supplement No., Contract Type, Terms, Duration, and Project. The right column includes fields for Parent Supplement No., Contract Status, Primary Template, Jurisdiction, Start Date, End Date, and Out Clause Days. Below these columns, there is a section for Contractor Information, including Name, Address, Contact Name, Currency, and End of Contract. A Notes section follows, showing a note from Nelson, Mary dated 11/4/2009. At the bottom, a Workflow section displays a table of tasks and their status.

Task Description	Assigned	Assigned To	Business Process	Initiated
Review Document	11/4/2009	Rogan, Chris	Add Contract	11/4/2009
Edit New Document	10/30/2009	UUC Capital Planning	Add Contract	10/30/2009

Use the Breadcrumb Menu

The user can navigate using the breadcrumb menu of the Toolbar Pane. Click on any item in the list to navigate to that option. For example, in the illustration below, go to the Summary

Screen by clicking on **Home**. 






Preview a Document

To preview a document in PDF format, click the **Print Preview** icon in the toolbar. Click the **Prepare Document** button. The document opens as a PDF document in Adobe Acrobat.

NOTE: If you are using a pop-up blocker, you may need to give the browser permission to open the document.

Item and Notes Icons in the Contract Listing View

The following icons are used to help identify if a contract has been checked out and by whom, and if the contract has any notes attached.

Name	Icon	Description
Checked out by you		The document icon with a green check mark indicates that the contract is currently checked out to the user who is logged in.
Checked out by Another User		The document icon with a red check mark indicates that the contract has been checked out by another user in the system. Rest your mouse pointer on the icon to see which user has the document checked out.
Checked in		The document icon without a check mark indicates that the contract has been checked into the repository.
Blank Note		There are no notes attached to this contract.
Note Present		Notes are attached to the contract and can be viewed by clicking on this icon.

Saved Searches

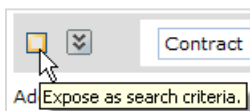
Saved Searches can be configured in the Contract Listing View, to display only those projects desired at a given time.

Configure a Saved Search in the Contract Listing View:

1. From the Contract Listing View, in the Saved Views area, click the **Configure** command button.
2. Click the **New** command button.
3. Enter the name in the **View Name** field.

NOTE: Do not use spaces in the view name.

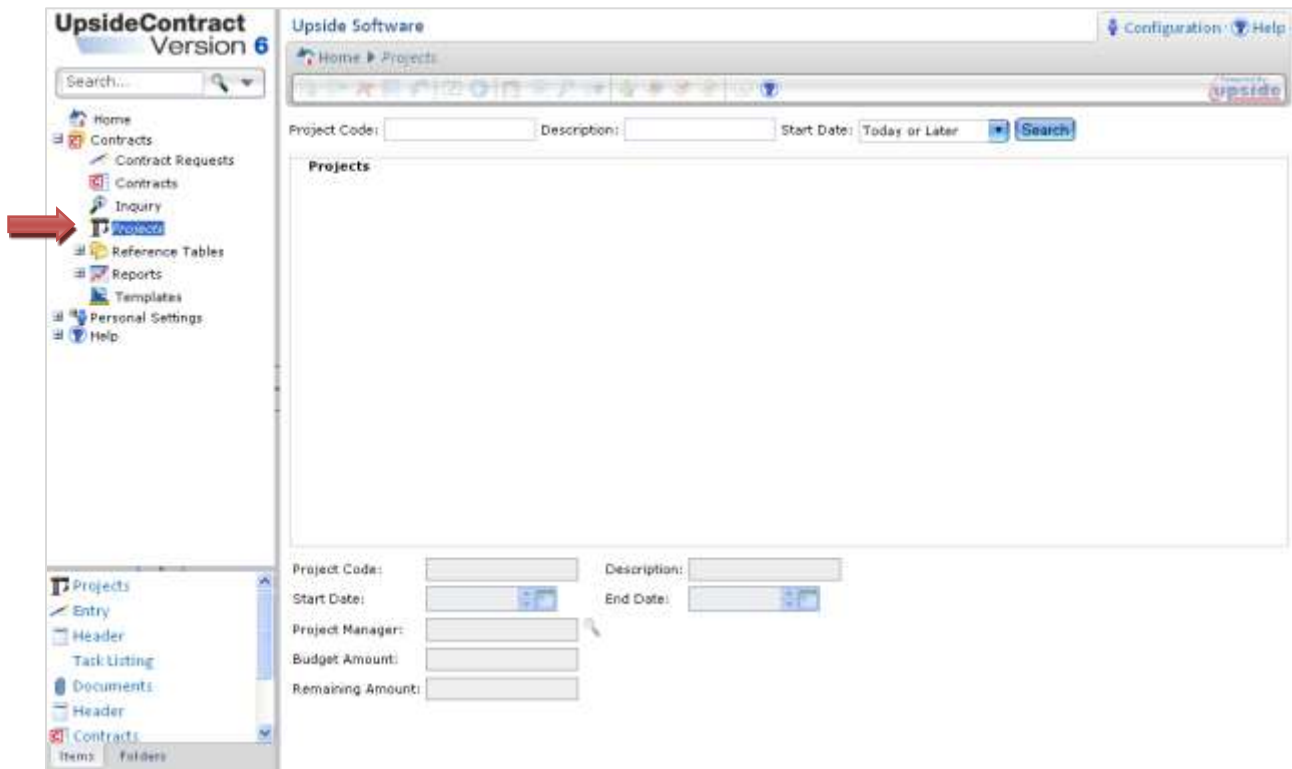
4. In the **Add New Criteria** drop-down field, select the criteria to add to the view.
5. In the **Expose as search criteria** checkbox, select if you wish to have the search criteria viewable.



Use this option if your criteria will necessitate the end-user searching for a criterion (such as Contract Manager) to filter the view.

-
6. Click the **Configure Grid** command button.
 7. Select the columns in the grid to have in your new view.
 8. Click the **Save** command button.

New Project



All contracts within **Upside** have relationships to projects. **Upside** pulls Project form information into the Contract Request and thereafter the Contract Document itself. The user must first create a Project before creating its related contracts. All contracts will use at least some of the data entered into the Project forms.

In order to create a Project, the user will need a minimal amount of information:

- Project Number.
- Project Title.
- Project Manager.
- Project Start Date.
- Project End Date

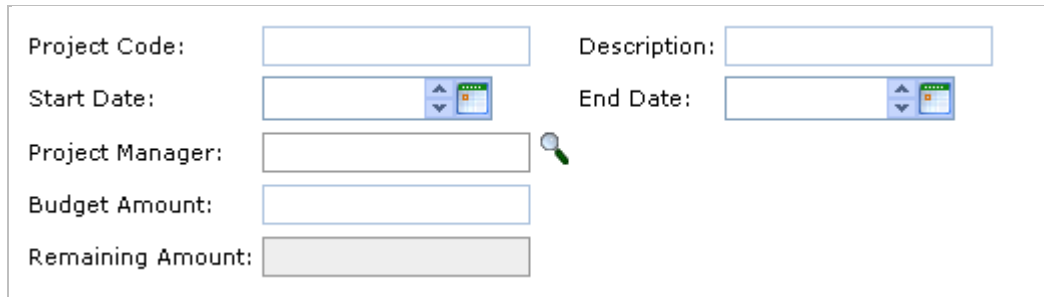
Create a Project

1. Click the plus sign (+) to expand the **Contracts** menu item.
2. Select the **Projects** menu item (as illustrated above).
NOTE: The Projects listing screen displays no projects by default. Search for the project(s) to display.
3. Select **All** from the **Start Date** drop-down list, and then click the **Search** command button.

NOTE: If you are creating a new project, you can safely ignore the list of projects.

4. Click the **Add** icon in the toolbar.
5. Complete the **Project Header** fields at the bottom of the screen (as illustrated below).

NOTE: In the event this information needs to be modified later, navigate to the Header item in the Menu Pane.



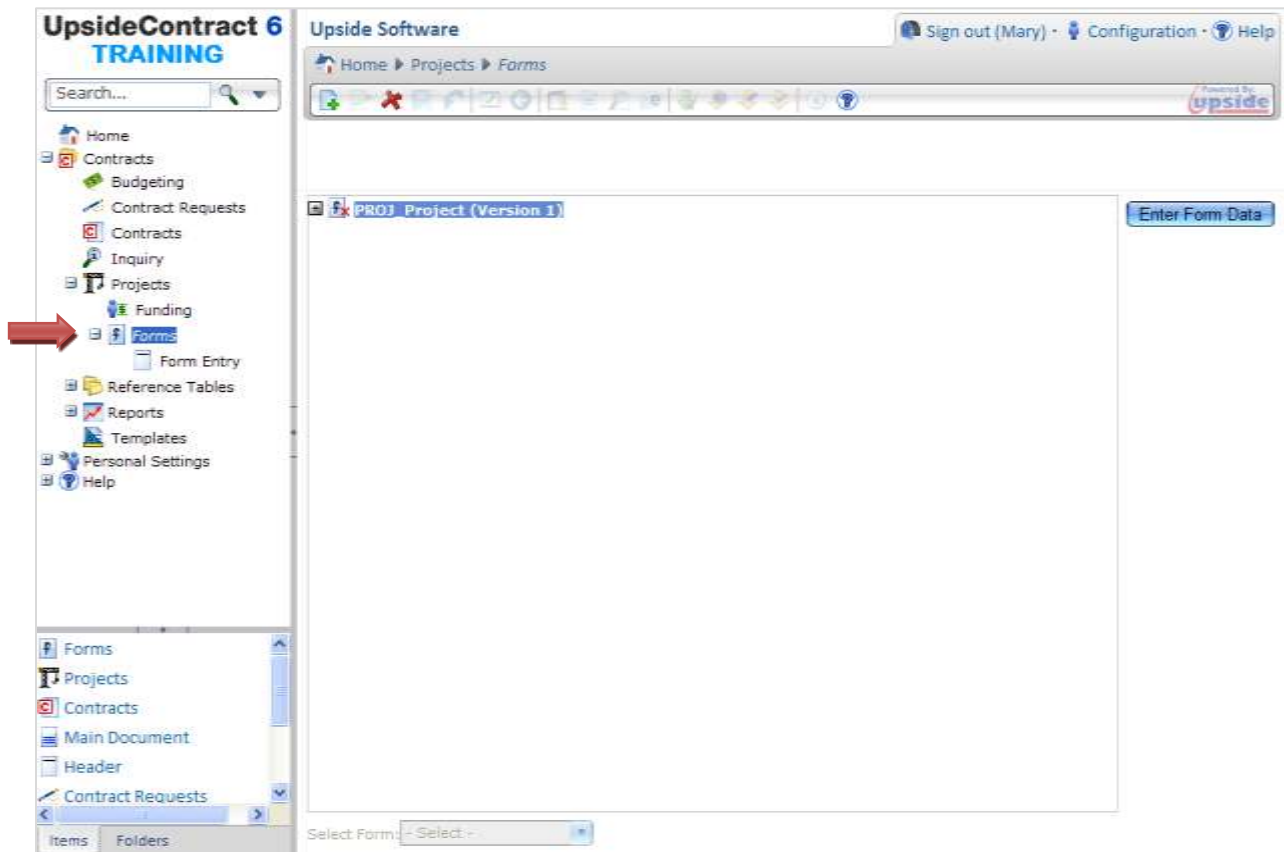
The screenshot shows a form with the following fields and controls:

- Project Code:** A text input field.
- Description:** A text input field.
- Start Date:** A date picker control with a calendar icon.
- End Date:** A date picker control with a calendar icon.
- Project Manager:** A text input field with a magnifying glass icon to its right.
- Budget Amount:** A text input field.
- Remaining Amount:** A disabled (grayed out) text input field.

- a. In the **Project Code** field, enter the Project Number.
 - b. In the **Description** field, fill in the Project Title. Abbreviate as needed since this field may only contain 100 characters.
 - c. In the **Start Date** and **End Date** fields, fill in the approximate start date of the project and the approximate date of substantial completion.
 - d. To select the **Project Manager**, click the magnifying glass icon.
 - e. Click the **Search** command button in the bottom right of the blue band.
 - f. Select the project manager's name.
 - g. Click the **Select** icon (v) in the toolbar.
 - h. In the **Budget Amount** field, type 999,999,999 (nine nines).
NOTE: Do **not** enter the project's budget amount because **Upside** will not allow creation of contracts beyond the amount entered into this field. If the project's scope or budget should change, the user might not be able to enter additional contracts.
6. Click the **Save** icon.
 7. Click on **Forms** under **Projects**.
 8. Click the **Add** icon in the toolbar.
 9. Click on the **Select Form** at the bottom of the page.
 10. Select **Proj_Project (Version 16)**.
 11. Click the **Save** icon.

The project shell has been created. Go on to enter data into the Project Form using **Form Entry**.

Project Form: General



Before creating any agreement or contract, the user must first complete some information about the contracts' related project. In one sense, creating the project is similar to creating a binder in the Contract Documents System (CDS) because a relationship is built between the project and its contracts.

The Project Form collects information used in multiple places in the agreement(s), contract(s), and letters you will eventually generate in **Upside**. For any contract, the General Project Form must first be completed.

Before proceeding, gather preliminary project information, such as:

- Project Number.
- Project Title.
- Project Description.
- Total Construction Budget.

This information can be modified later if necessary.

NOTE: The following characters may NOT be used in any form field:

Left angle bracket < OR Right angle bracket >

Complete the Project (General) Form:

1. Click on the **Project** menu again to see the new project in the list.
NOTE: It is possible that you may have to search again. (See [Using Search to Find Projects](#), later in this guide.)
2. Highlight the project just created and select the **Forms** menu item.
OR
If you are in the Funding view after creating the project, select the **Forms** item in the Menu Pane (see illustration on previous page).
3. Click the **Add** icon to activate the Forms drop-down list.
4. In the **Select Form** drop-down field at the bottom of the view, select **Project Form**.
5. Click the **Save** icon.
6. Click the **Enter Form Data** command button.

The screenshot displays the 'UpsideContract 6 TRAINING' software interface. The top navigation bar includes 'Home', 'Projects', 'Forms', and 'PROJ_Project'. The main form area is titled 'Project (General)' and contains the following fields:

- Form Name:** PROJ_Project, **Defn ID:** 11, **Defn Version:** 2, **Form Status:** Not Submitted
- Project Number - Name:** A1010001 - Illinois Capital Training Institute
- Project Information:**
 - Project Number:** A1010001, **Total Estimated Construction Budget:** [empty field]
 - Project Title:** Illinois Capital Training Institute
 - Project Location:** [Select...], **Will Project Use PRZM?:** [Select...]
 - Agreement Location:** [Select...]
 - Short Project Description:** [empty text area]
 - Project Organizational Unit:** [Select...]
 - Project Manager Name:** [empty field]
 - Project Manager Title:** [empty field]
 - Owner Office For Notices / Board of Trustees:** [empty field]
 - Owner Address For Notices / Board of Trustees:** [empty field]
 - Owner Contact Name For Notices:** [empty field]

The bottom of the form includes a 'Submit' button, a 'Data File Upload' section with a 'Browse...' button and an 'Upload' button, and a version indicator 'Version: 1 - 8/31/2010 Proc...'. The left sidebar shows a tree view with 'PROJ_Project' selected under 'Forms'.

NOTE: Enter data in this view about the Project which will feed fields in the contracts created later.

7. In the **Total Estimated Construction Budget** field, type in the Project's estimated total construction budget.
8. In the **Project Location** drop-down field, select the campus or other location.
9. In the **Agreement Location** drop-down field, select the appropriate location.
10. In the **Will Project Use PRZM?** drop-down field, select whether **PRZM** will be used during this project.

-
11. In the **Project Location** field, type in a short description (<750 characters).
 12. In the **Short Project Description** field, type in a short description (<1,750 characters).
 13. In the **Project Organizational Unit** drop-down field, select the appropriate unit.
 14. In the **Project Manager** drop-down field, select the name of the Project Manager.
 15. In the **Project Manager Title** field, type in the project manager's or planner's title.
NOTE: The Project Manager's or Planner's name and Title fields may be altered if assignment of the project changes.
 16. In the **Owner Office for Notices** drop-down field, select the appropriate office.
NOTE: The Owner Address for Notices field will automatically populate with the related address.
 17. In the **Contact Name for Notices** field, type the name of the person who should receive notices.
 18. Save the data by clicking the **Save** icon.
NOTE: Remember to save your data often. It is not necessary to Submit the data until you wish to create agreements, front-end documents, letters, notices, and/or contracts. However, if you do not submit your data, you will not be able to create any of the above mentioned documents.
 19. When all the necessary forms are complete, click the **Submit** command button at the bottom of the screen.
Submitting the data makes it available to the contracts to be created.

NOTE – Multiple Users Working in the Same Form(s):

It is possible for two individuals to be working within the same form at the same time.

When this happens, if:

- There are two different users, other than the person who created the most recent version, then:
 - The first person to save the form will create a new version.
 - The second person to save the form will get an error and not be able to save it.
- One of the users is the person who create the most recent version, then:
 - The order of who saves it doesn't matter.
 - The user who created the most recent version will update that version.
 - The other user will create a new version.

Project Form: Professional Services

The screenshot displays the UpsideContract 6 TRAINING software interface. The top navigation bar includes 'Home', 'Projects', 'Forms', and 'PRD1_Project'. The left sidebar contains a search bar and a list of menu items: Home, Contracts, Budgeting, Contract Requests, Contracts, Inquiry, Projects, Funding, Forms, Reference Tables, Reports, Templates, Personal Settings, and Help. The main content area shows the 'Professional Services' form for 'PRD1_Project'. The form includes fields for 'PSC Company', 'PSC Address', 'PSC Contact Name For Notices', 'Business Entity Type', 'Laws Of The State Of', 'Registered Agent Name', 'Registered Agent Address', 'Registered Agent City, St, ZIP', 'To verify registered agent information: www.ilsos.gov/corporatellc', 'Is this a Feasibility Study or Master Plan?', 'LEED Criteria and Sustainable Planning', and 'PSC Contract Type'. Below these fields is the 'Hourly Rates Schedule' table, which has columns for 'Position Title/Function', 'Actual Hourly Rate', 'Overhead And Burden', 'Negotiated fixed Fee', and 'Total Hourly Rate'. The table contains one row with values: '\$0.00 /hr', '1.3000', '7.0%', and '\$0.00 /hr'. The form also includes buttons for 'Insert Another Position', 'Calculate Total Hourly Rate', 'Submit', and 'Data File Upload'. The bottom right corner shows the version '1 - 10/2/2009 Nelson'.

UpsideContract 6 TRAINING

Upside Software

Sign out (Mary) · Configuration · Help

Home · Projects · Forms · PRD1_Project

Form Name: PRD1_Project Defn ID: 11 Defn Version: 1 Form Status: Not Submitted

Project (General) Professional Services Construction Manager Bidding Contractor

Project Number - Name: U08022 - Beckman Institute - MRI Suite Remodel

Professional Services Information:

PSC Company

PSC Address

PSC Contact Name For Notices

Business Entity Type

Laws Of The State Of

Registered Agent Name

Registered Agent Address

Registered Agent City, St, ZIP

To verify registered agent information: "www.ilsos.gov/corporatellc"

Is this a Feasibility Study or Master Plan?

LEED Criteria and Sustainable Planning

PSC Contract Type
(Contracts over \$25,000 must use the standard form)

Hourly Rates Schedule (Refer to University Scope and Fee Negotiation Policy for filling out this table)

Position Title/Function	Actual Hourly Rate	Overhead And Burden	Negotiated fixed Fee	Total Hourly Rate
	\$0.00 /hr	1.3000	7.0%	\$0.00 /hr

Insert Another Position

Calculate Total Hourly Rate

Project (General) Professional Services Construction Manager Bidding Contractor

Submit

Data File Upload: Browse Upload

Version: 1 - 10/2/2009 Nelson

The Professional Services Project form feeds fields in the Professional Services Agreement (PSA).

Some of this information may need to come from the Professional Services Consultant. A special **Upside** input form for this purpose is available through the UOCP&RES website.

Complete the Professional Services Project Form:

1. Navigate to the Project Forms.

OR

If you have just completed the Project's General form, continue to the next step.

2. Click the **Professional Services** command button.

-
3. In the **Filter for PSC Company Drop-Down** field, type the first letter or the first word of the PSC firm's name.

NOTE: This field is case sensitive. Be sure to use appropriate capitalization.

4. Click the **Populate Drop-Down** command button.
5. For the PSC Company listed, in the **PSC Company** drop-down field, select the name of the PSC.

NOTE: If the PSC name is not found or resulting address is incorrect, the PSC must register or update their information in the Vendor Services Application (VSA) system for Upside to receive the correct information. In order to refresh the data after the PSC has made the appropriate change in VSA, you must select a different PSC and then reselect the correct PSC to have the changed information from VSA be populated in Upside.

6. In the **PSC Contact Name for Notices** field, type the professional services consultant's contact name (use the format *Firstname Lastname*, e.g., John Doe).
7. In the **Business Entity Type** drop-down field, select the contractor's type of business.
8. In the **Laws of the State of** drop-down field, select the state.

NOTE: To jump down the menu, type the first few characters of the State's name.

9. In the **Registered Agent Name, Registered Agent Address, City, State and Zip** fields, appropriate information should be populated from what is contained in VSA. If any of this information is incorrect have the PSC update the VSA information as discussed above NOTE below step 5 above.

NOTE: To verify registered agent information, go to <http://www.ilsos.gov/corporatellc>

10. In the **Is this a Feasibility Study or Master Plan?** drop-down field, select Yes or No.

NOTE: Selecting Yes or No determines insurance requirements for the professional services consultant firm.

11. In the **LEED Criteria and Sustainable Planning** drop-down field, select one of the following:

- N/A.
- LEED Non Certified.
- LEED Certified.

12. In the **PSC Contract Type** drop-down field, select the contract type: **Amendment, Retainer, Short Form, Standard Form, or Energy Audit Agreement.**

NOTE: Contracts over \$25,000 must use the standard form.

13. If you selected **Retainer**, SKIP to step 18.

14. If you selected **Amendment**, SKIP to step 21.

15. If you selected **Energy Audit Agreement**, enter the Energy Audit Agreement total contract amount; skip to step 19 and follow the steps for the PSC to complete the ESCO Subconsultant Work Summary.

16. If you selected **Short Form**, continue below.

- a. In the PSC Compensation area, in the **Compensation Type** drop-down field, select the type of compensation: **Hourly NTE or Fixed Fee.**

- b. In the **Compensation** field, type in the amount of compensation.
- c. In the **Reimbursables** field, type in the amount of reimbursables.
- d. Click the **Sum** command button.
- e. SKIP to step 18.

17. If you selected **Standard Form**, the Professional Services Compensation area of the form will resemble the following illustration.

PSC Compensation:

Basic Services	Fixed Fee	Hourly	Supplemental Services	Fixed Fee	Hourly
Schematic Design	\$0	\$0	Conceptualization	\$0	\$0
Design Development	\$0	\$0	Interior Design	\$0	\$0
Construction Documents	\$0	\$0	Post Construction	\$0	\$0
Bidding	\$0	\$0	Construction On-Site	\$0	\$0
Construction	\$0	\$0	Other	\$0	\$0
Totals	\$0	\$0	Totals	\$0	\$0

Reimbursables \$0

Total Compensation \$0 **Sum**

Interior Design Requirements: None

Construction On-Site Avg Hrs/Wk 0

Construction On-Site # of Weeks 0

- a. Enter the **Fixed Fee** or **Hourly** rates for each of the Basic and Supplemental Services.
- b. In the **Reimbursables** field, type the amount of reimbursables.
- c. Click the **Sum** command button.
- d. In the **Interior Design Requirements** drop-down field, select the correct option: **None**, **Full**, or **Partial**.
- e. In the **Construction On-Site Average Hrs/Wk** field, type in the number of hours.
- f. In the **Construction On-Site # of Weeks** field, type the number of weeks.

18. Continue to the Hourly Rates Schedule area of the form, as illustrated below.

NOTE: Refer to the [Capital Professional Services Scope and Fee Negotiation Policy](#) at the UOCP&RES website for further information on completing the table.

Hourly Rates Schedule (Refer to University Scope and Fee Negotiation Policy for filling out this table)

Position Title/Function	Actual Hourly Rate	Overhead And Burden	Negotiated fixed Fee	Total Hourly Rate
▼ <input type="text"/>	\$0.00 /hr	1.3000	7.0	\$0.00 /hr

Insert Another Position

Calculate Total Hourly Rate

-
- a. In the **Position Title/Function** field, type in the name of the first position and the function that position will perform.
 - b. Type in the **Actual Hourly Rate** for that position.
 - c. If the **Overhead and Burden** rate differs from the default, type in the new rate.
NOTE: If you have overhead and burden rates that differ by company, include the PSC firm's here and add any differing subconsultant(s) rate(s) when you edit the Main Document. For further information on this topic, see [Completing a Professional Services Agreement](#), later in this guide.
 - d. If the **Negotiated Fixed Fee** differs from the default, type in the new fee.
 - e. To insert another position, click the **Insert Another Position** command button.
 - f. Continue adding Positions and Actual Hourly Rates until the entire list is complete.
 - g. Click the **Calculate Total Hourly Rate** command button.
19. Continue to the **Time of Completion** area of the form.
- a. Type in the **Phase Title, Projected Start Date** and **Projected Completion Date**.
 - b. Select **Add a Phase Date** for each additional phase that is to be added.
20. Continue to the **PSC/Subconsultant Work Summary** area of the form.
- a. Type in the **PSC/Subconsultant(s) Name/Address, Service(s) Provided** and **Total Contract Value**.
 - b. Totals and percentages will automatically be calculated after you click on the **Calculate Subconsultant Totals** command button.
 - c. Select **Add Subconsultant** for each additional subconsultant that is to be added.
 - d. The acronyms TBD and N/A in the **Total Contract Value** and **Percentage of PSC Agreement** may be used for Retainers since these values may not be known at the time of contract.
21. When initiating an Amendment, the **PSA Amendment Summary of Contractual Services** area must be completed.
- a. Type in the appropriate information in the following areas for each Amendment generated: **Phase Title, Original PSA** value for each phase, **Previous Amendment(s)** amounts and **Current Amendment** amounts.
 - b. The **Revised Professional Service Agreement** amount will automatically calculate as well as the **Totals** area. Steps number 17, 18 and 19 above may also need to be referenced and information changed if the Amendment affects any of these areas.
22. Click the **Save** icon in the toolbar to save your work.
23. If you wish to create any of the Professional Services' Documents now, click the **Submit** command button.
24. To create the Professional Services Document, continue on to [Initiating a Contract Request](#), later in this guide.

Project Form: Construction Manager

Upside Software Sign out (Mary) - Configuration - Help

Home > Projects > Forms > PROJ_Project

Form Name: PROJ_Project Defn ID: 11 Defn Version: 6 Form Status: Submitted

[Project \(General\)](#) [Professional Services](#) [Construction Manager](#) [Bidding](#) [Contractor](#)

Project Number - Name: C12777 - Nelson Training Institute

Construction Manager Information (if applicable):

Filter For CM Company Drop-Down
(Case Sensitive, Use * For All) [Populate Drop-Down](#)

CM Company

CM Address:

CM Contact Name For Notices: N/A

Business Entity Type:

Laws Of The State Of:

Registered Agent Name:

Registered Agent Address:

Registered Agent City, St, ZIP:

To verify registered agent information: "www.ilsos.gov/corporatelic"

PSC Compensation:

Basic Services	Fixed Fee	Hourly
Planning and Programming	<input type="text"/>	<input type="text"/>
Schematic Design	<input type="text"/>	<input type="text"/>
Design Development	<input type="text"/>	<input type="text"/>
Construction Documents	<input type="text"/>	<input type="text"/>
Bidding	<input type="text"/>	<input type="text"/>
Construction	<input type="text"/>	<input type="text"/>
Totals	<input type="text"/>	<input type="text"/>

Reimbursables:

Total Compensation: [Sum](#)

Hourly Rates Schedule (Refer to University Scope and Fee Negotiation Policy for filling out this table)

Name	Position Title/Function	Total Hourly Rate
<input type="text"/>	<input type="text"/>	<input type="text"/>

[Insert Another Position](#)

[Submit](#) [Download](#)

Data File Upload: [Browse](#) [Upload](#)

Version: 1 - 6/13/2012 Nelson

When the project involves a Construction Manager, fill in the Construction Manager details on the Construction Manager tab. If the project is **not** going to use a Construction Manager, enter *Not Applicable* into the **CM Contact Name for Notices** field.

NOTE: If the Construction Manager firm is not listed, contact AITS Upside Support to have the firm's information added to **Upside**.

Complete the Construction Manager Form:

1. Click the **Construction Manager** command button.
2. In the **Filter for CM Company Drop-Down** text box, type the first letter or the first word of the Contractor firm's name.
NOTE: This field is case sensitive. Be sure to use appropriate capitalization.
3. Click the **Populate Drop-Down** command button.
4. For the CM Company listed, in the **CM Company** drop-down field, select the name of the CM.
NOTE: If the CM name is not found or resulting address is incorrect, the CM must register or update their information in the Vendor Services Application (VS) system for Upside to receive the correct information. In order to refresh the data after the CM has made the appropriate change in VSA, you must select a different CM and then reselect the correct CM to have the changed information from VSA be populated in Upside.
5. In the **CM Contact Name for Notices** field, type the name of the CM contact in the *FirstName LastName* format.
6. In the **PSC Company** drop-down field, select the firm.
7. In the **PSC Contact Name for Notices** field, type the professional services consultant's contact name (use the format *Firstname Lastname*, e.g., John Doe).
8. In the **Business Entity Type** drop-down field, select the contractor's type of business.
9. In the **Laws of the State of** drop-down field, select the state.
NOTE: To jump down the menu, type the first few characters of the State's name.
10. In the **Registered Agent Name** field, type the name of the registered agent.
11. In the **Registered Agent Address** field, type the registered agent's street address.
12. In the **Registered Agent City, St, ZIP** field, type the registered agent's city, state, and zip code.
NOTE: To verify registered agent information, go to <http://www.ilsos.gov/corporatellc>
13. In the **Does the project involve new construction or add square footage to an existing building** drop-down field, select either **Yes** or **No**.
NOTE: If Yes, the form refreshes. If No, SKIP to step 17.
14. In the **Additional Builder's Risk Insurance** section, choose the checkbox for each of the types of additional insurance that applies to the project:
 - Delay in Completion (in the textbox add the dollar amount for this insurance).
 - Flood.
 - Earthquake.
 - If none apply, and you verified this within **FCPWeb**, click in the checkbox next to **None Apply per FCPWeb PDS**.
15. In the **CM Contract Type** drop-down, select **Amendment** or **Standard Form**.

16. If you selected **Amendment**, SKIP to step 22.
17. If you selected **Contract Type Standard Form** in the PSC Compensation area, enter the **Fixed Fee** and/or **Hourly** amounts in each of the relevant Basic Services fee areas including **Reimbursables**.
18. When all the fees are entered, click the **Sum** command button.
19. Continue to the Hourly Rates Schedule area of the form, as illustrated below.
NOTE: Refer to the [Capital Professional Services Scope and Fee Negotiation Policy](#) at the UOCP&RES website for further information on completing the table.

Hourly Rates Schedule (Refer to University Scope and Fee Negotiation Policy for filling out this table)

Name	Position Title/Function	Total Hourly Rate
<input type="text"/>	<input type="text"/>	\$0.00

[Insert Another Position](#)

- a. In the **Name** field, type the name of the individual.
 - b. In the **Position Title/Function** field, type in the name of the first position and the function that position will perform.
 - c. Type in the **Total Hourly Rate** for that person/position.
20. Continue to the **Time of Completion** area of the form.
 - a. Type in the **Phase Title, Projected Start Date** and **Projected Completion Date**.
 - b. Select **Add a Phase Date** for each additional phase that is to be added.
21. Continue to the **Construction Manager/Subconsultant Work Summary** area of the form.
 - a. Type in the **Construction Manager/Subconsultant(s) Name/Address, Service(s) Provided** and **Total Contract Value**.
 - b. Totals and percentages will automatically be calculated after you click on the **Calculate Subconsultant Totals** command button.
 - c. Select **Add Subconsultant** for each additional subconsultant that is to be added.
 - d. The acronyms TBD and N/A in the **Total Contract Value** and **Percentage of PSC Agreement** may be used for Retainers since these values may not be known at the time of contract.
22. When initiating an Amendment, the **CM Amendment Summary of Contractual Services** area must be completed.
 - a. Type in the appropriate information in the following areas for each Amendment generated: **Phase Title, Original CM** value for each phase, **Previous Amendment(s)** amounts and **Current Amendment** amounts.
 - b. The **Revised Professional Service Agreement** amount will automatically calculate as well as the **Totals** area. Steps number 19, 20 and 21 above may also need to

be referenced and information changed if the Amendment affects any of these areas.

23. Click the **Save** icon in the toolbar.

24. Click the Submit icon at the bottom of the page.

Project Form: Bidding

The screenshot displays the 'UpsideContract 6 DEVELOPMENT' web application in a Windows Internet Explorer browser. The address bar shows the URL: https://uillinois.edu/UpsideContract6/ContractProjectFormEntry.aspx?ProjCdv=U11111&Form=PROJ_Project. The browser's address bar also shows 'Bang'. The application's navigation pane on the left includes a search bar and a tree view with categories like Home, Contracts, Projects, Funding, Forms, Reference Tables, Reports, Templates, Admin, Personal Settings, and Help. The main content area is titled 'Upside Software' and shows the 'Project (General)' tab selected. The 'Bidding' tab is also visible. The form fields include: 'Project Number - Name: U11111 - Test 1', 'Bidding Information:', 'Builder's risk insurance provided by:' (a dropdown menu), 'Does the project involve new construction or an addition to an existing building?' (a dropdown menu), 'Owner purchased permanent equipment value:' (a text field with '\$0.00'), 'Number of days to substantial completion from notice to proceed:' (a text field), 'Liquidated Damages:' (a dropdown menu), 'Request fixed dates to the contract' (a dropdown menu with 'No' selected), 'Estimated Construction Costs (including contingency)' (a dropdown menu), 'Contract Type' (a dropdown menu), and a message: 'You're not quite ready to add divisions of work. Please ensure you've made a selection for these 3 fields: 1) Project Location (Project tab), 2) Project Construction Budget (Bidding tab), 3) Contract Type (single/multiple) (Bidding tab)'. The status bar at the bottom indicates 'Done' and 'Trusted sites | Protected Mode: Off'.

Form fields populate areas within the Front End Documents including 00 10 00 and 00 40 00. Some of the information entered into the Bidding tab will eventually populate construction contracts.

Complete the Bidding Form:

1. Click the **Bidding** command button.
2. In the **Builder's risk insurance provided by** drop-down field, select the Division of Work which will provide the builder's risk insurance for the project.
NOTE: If builder's risk insurance is not required, such as for parking lot striping, select the No builder's risk insurance option at the bottom of the list. When this option is selected, the reason why it's not required must be given. Selecting this option will automatically trigger additional approvals during the workflow process.
3. In the **Owner purchased permanent equipment** field, type the value for Owner purchased permanent equipment.

-
4. In the **Review Set Deposit Amount** field, type the dollar amount for review sets.
 5. In the **Number of days to substantial completion from notice to proceed** field, type in the number.
 6. In the **Liquidated Damages** field:
 - a. If there will not be liquidated damages in the contract, accept the default, **No**.
 - b. If there will be liquidated damages in the contract, select **Yes**.
 - c. Since a deviation from standard contract language has been requested, a field appears which requires the justification for the change. Type in the reason for liquidated damages and damage amounts. Selecting this option will automatically trigger additional approvals during the workflow process.
 7. In the **Request fixed dates to the contract** field:
 - a. If there will not be fixed dates, accept the default, **No**.
 - b. If the contract will require fixed dates, select **Yes**.
 - c. Since a deviation from standard contract language has been requested, a field appears which requires the justification for the change. Type in the reason for fixed dates in the contract. Selecting this option will automatically trigger additional approvals during the workflow process.
 - d. In the **Provide the requested alternate contract fixed date language below**, type in the necessary dates for the construction schedule.
 8. In the **Estimated Construction Costs (including contingency)** drop-down field, select one of the following options, as illustrated below.
 - Less than \$250k.
 - Between \$250k and \$2 million.
 - Greater than or equal to \$2 million.

NOTE: Estimated Construction Costs (including contingency) determines whether the mandatory pre-bid meeting language will appear in the contract. For projects under \$1 million, select whether you will have mandatory pre-bid meeting language in the contract. For projects over \$1 million, pre-bid meeting language is required.

Estimated Construction Costs (including contingency)
(Determines MBE/FBE goal editing, GFE and
Mandatory Pre-bid Requirements): between \$250k and \$1 million

Is the prebid meeting mandatory for non MBE/FBE
reasons? No

Will project specific MBE/FBE goals deviate from
baseline? (Urbana-Champaign baseline goal = 15%) No

9. If the estimated construction cost is less than \$2 million, the pre-bid meeting option will appear. Select **Yes** if a mandatory pre-bid meeting is desired. If not, select **No**.
10. In the **Will project specific MBE/FBE goals deviate from baseline?** field, only select **Yes** if the goals are different from your campus' goals (UIC = 22%; all other campuses = 15%).

11. If you selected Yes in the previous step, the **Combined MBE/FBE (%)** and **Split Goals Applicable?** fields and listing the Divisions of Work will activate.

Estimated Construction Costs (including contingency) (Determines MBE/FBE goal editing, GFE and Mandatory Pre-bid Requirements): between \$250k and \$2 million

Is the prebid meeting mandatory for non MBE/FBE reasons? No

Will project specific MBE/FBE goals deviate from baseline? (Chicago baseline goal = 22%) Yes

Contract Type Single

Assignment Non Assigned

Division Of Work 01 - General Work

Combined MBE/FBE (%)

MBE (%)

FBE (%)

Split Goals Applicable? ☒ Yes

Add Another Division of Work

- Type in the new goals.
- If split goals are applicable, choose the **Yes** checkbox.

IMPORTANT NOTE: As of February 2011, baseline goals are the only goals to be used. Split goals are reserved for future implementations.

12. In the **Contract Type** field, select one:

- Single.
- Multiple.

13. If *Single* was selected, in the **Division of Work** drop-down field, select the related division of work. SKIP to Step 11.

- Click the **Add Another Division of Work** command button to add another Division of Work.

OR

Click the down arrow to the left of the **Assignment** field to add or delete items.

Contract Type

Assignment

Select...

Insert Division_Of_Work_Info above

Insert Division_Of_Work_Info below

Remove Division_Of_Work_Info

- Continue adding divisions of work, with their assignments, as necessary, until all assignments and divisions of work have been added.
- SKIP to Step 11.

14. If *Multiple* was selected:

- In the **Assignment** drop-down field, select the assignment type: Assigned, Non-Assigned, or Contractor with Assigned.

- b. In the **Division of Work** drop-down field, select the related division of work.
- c. Click the **Add Another Division of Work** command button to add another Division of Work.

OR

Click the down arrow to the left of the **Assignment** field to add or delete items.

- d. Continue adding divisions of work, with their assignments, as necessary, until all assignments and divisions of work have been added.

15. If there are Alternates:

- a. In the **Alternate Work Item Description** field, type the Alternate number followed by the description of the alternate.

EXAMPLES:

Alternate No. 1 – Provide oak chair rail.

Alternate No. 2 – Install acrylic floor covering.

- b. In the **Alternate Division of Work** drop-down fields, all Divisions of Work will automatically populate for each Bid Alternate displayed. The checkbox to the left must remain checked for that Division of Work to be incorporated into all applicable **Upside** documents.

16. If there are Unit Prices:

- a. In the **Unit Price Description** field, type the Unit Price number and descriptions.
- b. In the **Unit Price Division of Work** drop-down field, select the unit price's related Division(s) of Work.

NOTE: Select more than one division by holding the CTRL key while making selections.

- c. To add additional unit prices, click the **Add Another Unit Price** command button.

OR

Click the down arrow to the left of the **Unit Price Description** field to add or delete items.

17. Complete the remaining following areas of the Bidding are of the Project Form:

- Detailed Project Description.
- Detailed Description of Project Location.
- Publish Date.
- Bid set purchase information.
- Pre-bid Conference meeting area.
- Pre-bid Conference date and time.
- Project-Specific Contractor Prequalification selection and appropriate information (if applicable).
- Contract Type – Select Multiple or Single and then identify Contractor and Assigned Subcontractor (if applicable) bid deadlines, bid opening locations and bid times.

18. Click the **Save** icon in the toolbar to save your work.

19. If creation of Front End Documents is next, click the **Submit** command button.

20. To create the Front End Documents, continue on to [Initiating a Contract Request](#), later in this guide.

Project Form: Contractor

Project (General) Professional Services Construction Manager Bidding Contractor

Project Number - Name: 613-C07036 - Renovation for College of Business Administration

Addenda:

Addenda Number	Addenda Date
1	1/29/2010
2	2/5/2010
3	2/5/2010
4	2/8/2010

Add Another Addenda

Awarding:

Division of Work Base Bid:

01 - General Work

02 - Plumbing Work

03 - Heating A/C Temp Control Work

04 - Ventilation Work

05 - Electrical Work

Awarding

Awarded

Awarded

Awarded

Awarded

Awarded

Fields in the Contractor area are partially populated through the Bidding area. The additional information entered here will partially populate the construction contracts. The final contract will pull information from other areas on the Project form as well.

Complete the Contractor Form:

1. Click the **Contractor** command button.
2. If there are Addenda:

NOTE: If you issued Addenda prior to bid opening, you will need to include all issued addenda dates in this area so that they will be reflected in construction contracts later.

- a. In the **Addenda** section, add the addendum number and its related date.

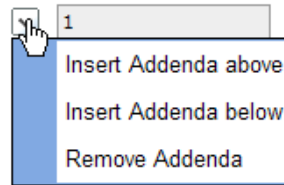
NOTE: Either type the date (using the date format M/D/YYYY) or use the date navigator by clicking the calendar icon.

TIP: To add today's date, click the up arrow next to the calendar icon. To go back one month, click the down arrow next to the calendar icon.

- b. Click the **Add Another Addenda** command button to add additional addenda.

OR

Click the down arrow to the left of the **Addenda Number** field to add or delete items.



3. If some of the items were not awarded, change the default statuses from **Awarded** to **Not Awarded**.
4. Scroll down the page to the **Begin Section for Division of Work** area.

NOTE: Fields in this illustration are already filled in.

A screenshot of a web form titled 'BEGIN SECTION FOR DIVISION OF WORK - 01 - General Work'. The form contains various fields for contractor and surety information. The 'Division Of Work' is set to '01 - General Work'. The 'Filter For Contractor Drop-Down' field contains 'Barton Malow Company'. The 'Contractor Name' is 'Barton Malow Company'. The 'Contractor Address' is '100 N. Riverside Plaza, Suite 1660, Chicago, IL, 60606'. The 'Contractor Contact Name For Notices' is 'Bruce Watts'. The 'Business Entity Type' is 'Corporation'. The 'Laws Of The State Of' is 'Michigan'. The 'Registered Agent Name' is 'CT Corporation'. The 'Registered Agent Address' is '208 S. LaSalle Street'. The 'Registered Agent City, St, Zip' is 'Chicago, IL 60604'. The 'Surety Name' is 'Liberty Mutual Insurance Company'. The 'Surety Address' is '8044 Montgomery Road, Suite 626W'. The 'Surety City, St, Zip' is 'Cincinnati, Ohio 45236'. The 'Surety - Laws Of The State Of' is 'Massachusetts'. The 'Base Bid' is '\$3,748,000.00'. The 'Alternates' section shows 'Alternate No. 1: Modify AHU' with a value of '\$0.00'. The 'Contract Sum' is '\$3,748,000.00'.

5. In the **Filter for Contractor Drop-Down** field, type the first letter or the first word of the Contractor firm's name.
- NOTE:** This field is case sensitive. Be sure to use appropriate capitalization.
6. Click the **Populate Drop-Down** command button.
7. For the Division of Work listed, in the **Contractor Name** drop-down field, select the name of the contractor for that division of work.

NOTE: If the Contractor name is not found or resulting address is incorrect, the Contractor must register or update their information in the Vendor Services Application (VSA) system for Upside to receive the correct information. In order to refresh the data after the Contractor has made the appropriate change in VSA, you must select a different Contractor and then reselect the correct Contractor to have the changed information from VSA be populated in Upside.

8. In the **Contractor Contact Name for Notices** field, type the name of the Contractor's contact in the form *FirstName LastName*.
9. In the **Business Entity Type** drop-down field, select the contractor's type of business.
10. In the **Laws of the State of** drop-down field, select the state.

NOTE: To jump down the list, type the first few characters of the State's name.

11. In the **Registered Agent Name, Registered Agent Address, City, State and Zip** fields, appropriate information should be populated from what is contained in VSA. If any of this information is incorrect have the Contractor update the VSA information as discussed above NOTE below step 7 above.

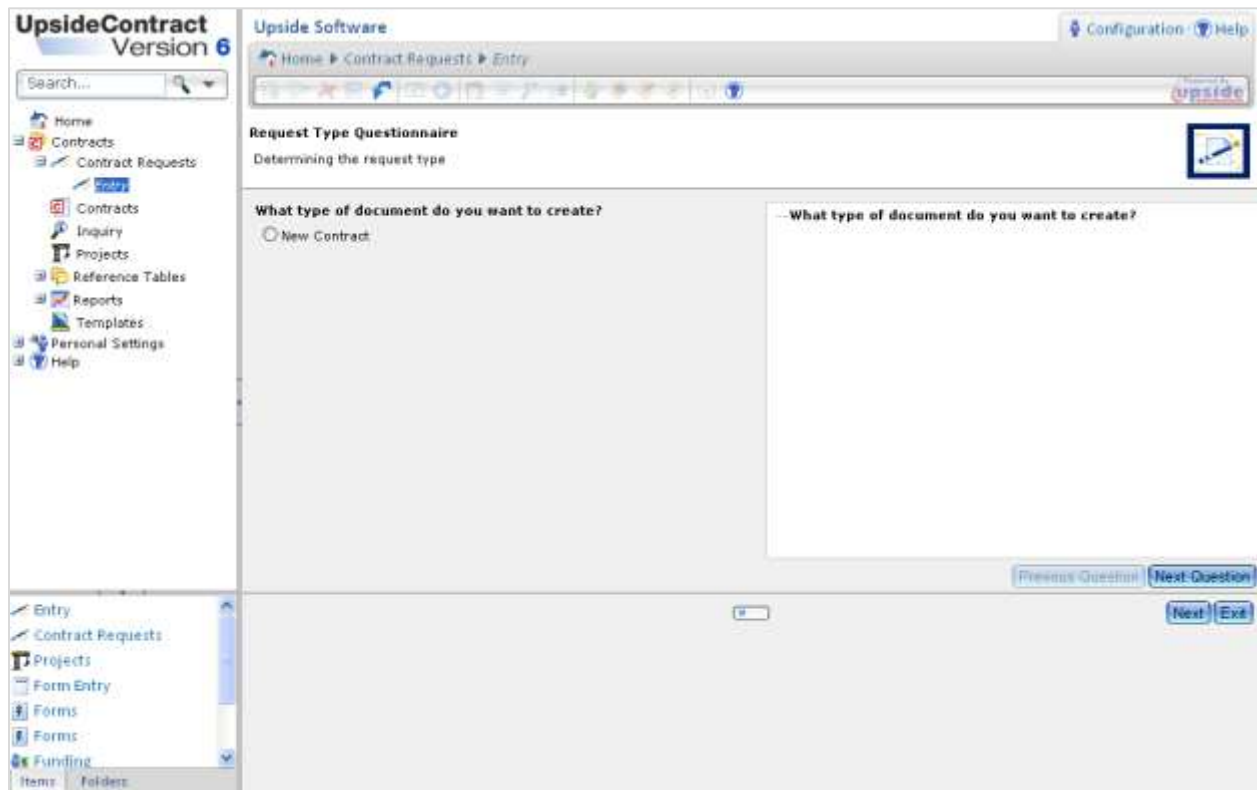
Verify registered agent information at <http://www.ilsos.gov/corporatellc>

12. In the **Surety Name** text box, type the name of the Contractor's Surety.
13. In the **Surety Address** text box, type the type the street address of the Surety.
14. In the **Surety City, St, ZIP** text box, type the Surety's city, state and zip code.
15. In the **Surety – Laws Of The State Of** drop-down field, select the Surety's state.
16. In the **Base Bid** field, type in the Contractor's base bid amount.
17. For each awarded alternate, type in the amount.
18. In **Contract Sum** area, click the **Sum** command button.
19. For each additional Division of Work, repeat steps 4-18.
20. Click the **Save** icon in the toolbar to save your work.

NOTE: To create a contract for a contractor with assigned sub-contractors, all information about all contractors must be added to the Contractor form.

21. If creation of contractor contracts is next, click the **Submit** command button.
22. To create the contractor contracts, continue on to [Initiating a Contract Request](#), the next topic in this guide.

Initiate a Contract Request



A Contract Request is a wizard to assemble data from the Project forms and from the Template boilerplate text, based on the selections made and data input provided when the wizard is run. Once the Contract Request is finished, the Contract Document, containing all of the selections, is generated automatically. The Contract Document may need to be edited depending upon the contract type.

NOTE: The user can create and subsequently resume a Contract Request. Once the **Finish** button is clicked for a Contract Request, however, it can no longer be edited.

The following procedure is a generic one. Options may vary, depending upon which type of document or letter is being requested. To learn more about a specific Contract Request type, see the individualized procedure for that type, later in this guide.

Create a Contract Request:

1. From the Summary Screen, in the Documents area, select the **Create a Contract Request** link.
OR
In the Menu Pane, select the **Contract Requests** menu item and click the **Add** icon in the toolbar.

-
2. On the Request Type Questionnaire, choose the **New Contract** radio button.
 3. Click the **Next Question** command button.
 4. On the Contract Type Questionnaire, select the contract type and then click the **Next Question** command button.
 5. In the **What type of contract?** area, choose the appropriate type.

What type of contract?

- ☐ Construction - Assigned Subcontractor
- ☐ Construction - Bid Advertisement
- ☐ Construction - Contractor With Assigned Subs
- ☐ Construction - Contractor With No Assignment
- ☐ Construction - Front End Documents
- ☐ Construction - Good Faith Effort Letter
- ☐ Construction - MAFBE Pre-Bid Meeting Information
- ☐ Construction - Notice of Award Letter
- ☐ Construction - Notice of Award/Proceed Letter
- ☐ Construction - Notice of Intent to Award Letter
- ☐ Construction - Notice to Proceed
- ☐ Construction Management - Amendment
- ☐ Construction Management - Standard Form
- ☐ Construction Management - Award Letter
- ☐ Energy Performance Contracting - ESA
- ☐ Energy Performance Contracting - EAA
- ☐ Energy Performance Contracting - RFP
- ☐ Professional Services - Advertisement
- ☐ Professional Services - Amendment
- ☐ Professional Services - Award Letter
- ☐ Professional Services - Retainer Renewal Letter
- ☐ Professional Services Agreement - Retainer
- ☐ Professional Services Agreement - Short Form
- ☐ Professional Services Agreement - Standard Form
- ☐ Professional Services-RFP Consultant Advertisement

6. Click the **Next Question** command button.
7. Confirm the **Request Header Entry** information.
8. Click the **Next** command button.
9. On the **Project Selection** page, drop down the **Project Code** field and select the project.

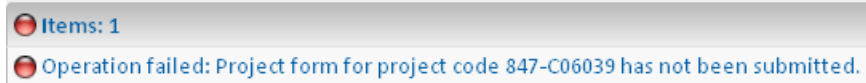
OR

In the **Filter for drop-down list** field, type in the project number and click the **Apply Filter** command button. Select the project from the drop-down list.

NOTE: Up until this point, a Contract Request can be exited and will not be saved. If a project is selected and the Next button is clicked, the Contract Request will be saved when exiting.

10. Click the **Next** command button.

NOTE: If the following error message appears, return to the Project Forms area and submit the previously entered data by clicking the **Submit** command button.



The read only Project Form will now appear for the selected project. Verify that sufficient project information has been entered to create the current contract.

11. Click the **Next** command button to continue.

12. Review the READ ONLY version of the project form.

NOTE: If errors are discovered on the contract request version of the project form, exit the Contract Request process, return to the project form and modify it, and then re-submit to import the corrected information.

13. Click the **Next** command button.

14. Depending on the contract type, the user may be required to edit the Contract Request Input page and add additional information. The table below summarizes the information to provide, with the exception of the Front End Documents.

Contract Type	Variable Information
Professional Services Advertisement	If CDB project*
Professional Services Agreement	N/A*
Professional Services Amendment	Select appropriate PSA attachments to be included*
Professional Services Award Letter	N/A*
Professional Services – Retainer	N/A*
Professional Services – Retainer Renewal Letter	N/A*
Professional Services – RFP Consultant Advertisement	N/A*
Construction Management Agreement	N/A*
Construction Management Amendment	N/A*
Front End Documents	Multiple fields
Bid Advertisement	N/A*
Construction – Pre-Bid Meeting Information	N/A*
Contractor with No Assignment	Division of Work
Contractor with Assigned	Divisions of Work
Assigned Subcontractor	Division of Work
Notice of Award Letter	Division of Work
Notice to Proceed Letter	Contract Type (Single/Multiple) Division(s) of Work
Notice of Intent to Award Letter	Division of Work
Notice of Award/Proceed (combined) Letter	Contract Type (Single/Multiple) Division(s) of Work

***NOTE:** Add variable information for these documents directly into the Main Document while editing, rather than during the Contract Request.

15. Click the **Next** command button.

16. Attach any documents as necessary.

NOTES:

- For some contract types, this option is not available.
- Only attach PDF files. Do not attach other file types.
 - a. Click the **Add** icon in the toolbar.
 - b. Near the bottom of the screen, in the **Document Title** text box, type a name for the attachment.
 - c. In the **Document Date** text box, type the date of the document, or use the date navigator to navigate to the appropriate date.
 - d. In the **Type** area, choose the **Attached** radio button.
 - e. Click the **Select** command button and navigate to the folder where the file resides.
 - f. Select the filename.
 - g. Click the **Open** command button.
 - h. To have the file appear as part of the contract, choose the **Print** and **Include in Document** checkboxes.

NOTE: If the attachment is just for reference, do not choose these options. To view all attachments to a contract, see [Adding and Viewing Document Attachments](#).

17. Click the **Finish** command button.

IMPORTANT: Make a note of the Contract Number from the listing on the Contract Request screen. You definitely will need to know this later. If you exit the Contract Request before you click the Finish button, make a note of the Request ID so that you may return to it later.

IMPORTANT: If you complete a Contract Request and subsequently notice errors in the contract, you will NOT be able to modify the contract request. Follow the instructions in the topic [Modifying a Contract Document](#), later in this guide.

Add Notes to a Contract Request:

1. From the Contracts menu, select **Contract Requests**.
2. Select the record that requires a note.
3. Click the **Notes** icon in the toolbar.
4. Click the **Add** icon to add a note to the Contract Request.
5. Enter note text in the **Notes** field.

NOTE: A note cannot exceed 2,000 characters.

Exit and Resume a Contract Request:

A Contract Request can be exited at any time. If exited after the Project Selection page, the request will be saved. If exited before that, the request will not be saved.

1. **To exit** a contract request, at any stage, click the **Exit** command button.

If the request was saved, it will appear with a Request ID but without a contract number.

NOTE: The contract number is not assigned until the Finish button is clicked. Until that time, it will have a Request ID assigned to it.

2. **To resume work** on a Contract Request:

- a. In the Contract Requests view, select the Contract Request to resume.
- b. Click the **View/Edit** icon in the toolbar.
- c. Continue the contract request.
- d. Click the **Finish** command button when ready to generate the contract.

The Contract Request Listing screen appears, displaying both the Contract Request ID and the Contract Number.

IMPORTANT: Write down the above numbers for future reference.

Delete a Contract Request:

Occasionally you may wish to delete a contract request. Only an **incomplete** Contract Request may be deleted (the Finish button has not been clicked).

1. In the Contract Requests view, select the Contract Request to delete.
2. Check out the Contract Request.
3. Click the **Delete** icon in the toolbar.
4. Click the **OK** command button in the confirmation dialog box which asks:
"Are you sure you wish to delete the selected record?"
5. Type a brief note about the deletion.
6. Click the **Save** icon.

The record is deleted from the view.

Professional Services Advertisement

The screenshot displays the 'UpsideContract 6 TRAINING' software interface. The left sidebar contains a navigation menu with options like Contracts, Budgeting, Contract Requests, Workflow, Contracts, Inquiry, Projects, Reference Tables, Reports, Templates, Admin, Personal Settings, and Help. The main window is titled 'Contract Request Input Page' and contains instructions for inputting data. It includes a section for 'AD - Professional Services Contract Request Information' with a warning to review information and a dropdown menu for 'Is this PSC advertisement for a CDB Project?'. At the bottom, a status bar shows three items: 'ContractHeader1.xml', 'PROJDOWS.xml', and 'feed.xml', each with a message indicating a change that requires saving the form to integrate data source changes.

Before a Professional Services Advertisement can be completed, the user must already have:

- Created a Project in **Upside**.
- Completed the General view in the Project Form.
- Submitted the Project Form.

Create a Professional Services Advertisement:

1. Begin a **Contract Request**. See [Initiating a Contract Request](#), earlier in this guide.
2. In the “What type of contract?” area, choose the **Professional Services – Advertisement** selection.
3. Click the **Next Question** command button.
4. Confirm the **Request Header Entry** information.
5. Click the **Next** command button.
6. On the **Project Selection** page, drop down the **Project Code** field and select the project.

OR

In the **Filter for drop-down list** field, type in the project number and click the **Apply Filter** command button. Select the project from the drop-down list.

NOTE: The user may exit a Contract Request and resume it later. See [Exiting and Resuming a Contract Request](#), earlier in this guide.

-
7. Click the **Next** command button.
 8. Review the READ ONLY version of the project form.
NOTE: If errors are discovered on the contract request version of the project form, exit the Contract Request process, return to the project form and modify it, and then re-submit to import the corrected information.
 9. Click the **Next** command button.
 10. Read the Contract Request Input page.
 11. In the **Is this project a CDB Project?** drop-down field, select either **Yes** or **No**.
 12. In the **Request a modification to non-editable contract text** drop-down field:
 - If no modifications are needed, accept the default answer, **No**, and SKIP to step 15.
 - If modifications are needed, select **Yes**.

A deviation from standard contract language has been selected; therefore provide justification below.

Contract Text Modification: (If needed attach files using the next page)

The image shows a screenshot of a web form. At the top, there is a header text: "A deviation from standard contract language has been selected; therefore provide justification below." Below this is a large, empty text box with a vertical scrollbar on the right. Below the first text box is another header text: "Contract Text Modification: (If needed attach files using the next page)". Below this is a second large, empty text box, also with a vertical scrollbar on the right.

- a. In the first text box illustrated above, type justification for the changes to be made.
 - b. In the second text box illustrated above, type the contract text modification to appear in the contract. Include the section in which the change should appear.
- OR**
- On the Attached Documents Entry screen of the Contract Request, attach a document which explains the justification for the change and its additional contract text.
- NOTE:** Both of the above fields are limited to 4,000 characters.
- NOTE:** If attaching a document to justify a change of contract language, remember NOT to choose the **Include in Document** and **Print** checkboxes.
13. Click the **Next** command button.
 14. To attach a document:
 - a. Click the **Add** icon in the toolbar.
 - b. Near the bottom of the screen, in the **Document Title** text box, type a name for the attachment.
 - c. In the **Document Date** text box, type the date of the document, or use the date navigator to navigate to the appropriate date.

-
- d. In the **Type** area, choose the **Attached** radio button.
 - e. Click the **Select** command button and navigate to the folder where the file resides.
 - f. Select the filename.
 - g. Click the **Open** command button.
 - h. To have the file appear as part of the contract, choose the **Print** and **Include in Document** checkboxes.
- NOTE:** If the attachment is just for reference, do not choose these options. To view all attachments to a contract, see [Adding and Viewing Document Attachments](#).
15. When the attachment(s) and security assignments have been completed (if any), click the **Finish** command button.

IMPORTANT: Write down the Contract Number. You will need to know this later. If you exit the Contract Request before you click the Finish button, make a note of the Request ID so that you may return to it later.

Once the Professional Services Advertisement Contract Request is finished, the next step is to edit the Main Document of the Professional Services Advertisement to add the variable information that could not be added on the Project form. See [Editing a Main Document](#), later in this guide.

Professional Services Agreement Contract Request

Upside Software

Home ▶ Contract Requests ▶ New Contract Request

Sign out (Vince) Configuration Help

Contract Type Entry

Determining the contract type

What type of contract?

- ☐ Construction - Assigned Subcontractor
- ☐ Construction - Bid Advertisement
- ☐ Construction - Contractor With Assigned Subs
- ☒ Construction - Contractor With No Assignment
- ☐ Construction - Front End Documents
- ☐ Construction - Notice of Award Letter
- ☐ Construction - Notice of Award/Proceed Letter
- ☐ Construction - Notice of Intent to Award Letter
- ☐ Construction - Notice to Proceed
- ☐ Construction - Pre-Bid Meeting Information
- ☐ Construction Management - Amendment
- ☐ Construction Management - Standard Form
- ☐ Professional Services - Advertisement
- ☐ Professional Services - Amendment
- ☐ Professional Services - Award Letter
- ☐ Professional Services - Retainer Renewal Letter
- ☐ Professional Services Agreement - Retainer
- ☐ Professional Services Agreement - Short Form
- ☒ Professional Services Agreement - Standard Form
- ☐ Professional Services-RFP Consultant Advertisement

What type of contract?

Previous Question Next Question

Prev Next Exit

Before a Professional Services Agreement can be completed, the user must already have:

- Created a Project in **Upside**.
- Completed the General view in the Project Form.
- Completed the Professional Services view in the Project Form.
- Submitted the Project Form.

Create a Professional Services Agreement Contract Request:

1. Begin a **Contract Request**. See [Initiating a Contract Request](#), earlier in this guide.
2. In the “What type of contract?” area, choose the **Professional Services Agreement**, either **Short Form** or **Standard Form**.
3. Click the **Next Question** command button.
4. Confirm the **Request Header Entry** information.
5. Click the **Next** command button.

-
6. On the **Project Selection** page, drop down the **Project Code** field and select the project.

OR

In the **Filter for drop-down list** field, type in the project number and click the **Apply Filter** command button. Select the project from the drop-down list.

NOTE: The user may exit a Contract Request and resume it later. See [To Exit and Resume a Contract Request](#), earlier in this guide.

7. Click the **Next** command button.
8. Review the READ ONLY version of the project form.

NOTE: If errors are discovered on the contract request version of the project form, exit the Contract Request process, return to the project form and modify it, and then re-submit to import the corrected information.

9. Click the **Next** command button.
10. Read the Contract Request Input page.
11. In the **Request a modification to non-editable contract text** drop-down field:
- If no modifications are needed, accept the default answer, **No**, and SKIP to step 14.
 - If modifications are needed, select **Yes**.

The screenshot shows a web form with two text input areas. The first area is preceded by the text "A deviation from standard contract language has been selected; therefore provide justification below." The second area is preceded by the text "Contract Text Modification: (If needed attach files using the next page)". Both text boxes are empty and have vertical scrollbars on their right sides.

- a. In the first text box illustrated above, type justification for the changes to be made.
- b. In the second text box illustrated above, type the contract text modification to appear in the contract. Include the section in which the change should appear.

OR

On the Attached Documents Entry screen of the Contract Request, attach a document which explains the justification for the change and its additional contract text.

NOTE: Both of the above fields are limited to 4,000 characters.

NOTE: If attaching a document to justify a change of contract language, remember NOT to choose the **Include in Document** and **Print** checkboxes.

12. Click the **Next** command button.
13. To attach a document:

-
- a. Click the **Add** icon in the toolbar.
 - b. Near the bottom of the screen, in the **Document Title** text box, type a name for the attachment.
 - c. In the **Document Date** text box, type the date of the document, or use the date navigator to navigate to the appropriate date.
 - d. In the **Type** area, choose the **Attached** radio button.
 - e. Click the **Select** command button and navigate to the folder where the file resides.
 - f. Select the filename.
 - g. Click the **Open** command button.
 - h. To have the file appear as part of the contract, choose the **Print** and **Include in Document** checkboxes.

NOTE: If the attachment is just for reference, do not choose these options. To view all attachments to a contract, see [Adding and Viewing Document Attachments](#).

14. When the attachment(s) and security assignments have been completed (if any), click the **Finish** command button.

IMPORTANT: Write down the Contract Number. You will need to know this later. If you exit the Contract Request before you click the Finish button, make a note of the Request ID so that you may return to it later.

Once the Professional Services Agreement (PSA) Contract Request is finished, the next step is to edit the Main Document of the PSA. See the next topic.

Main Document

The screenshot displays the UpsideContract 6 TRAINING software interface. The top navigation bar shows the path: Home > Contracts > Contract C-1419 > Documents > Main Document. The main content area is divided into sections: Document Header, Custom Data: Agreement_Location_URL, Chicago, University of Illinois at Chicago, QBS #PSS: [Contract_Hdr_Project_Number], Request for Professional Services Qualifications (QBS), [Contract_Hdr_Project_Title], First published MONTH DATE, YEAR, Custom Data: CDB_Project, and Project Description. The Project Description section contains a table with 7 columns and 1 row, all of which are grayed out. A red arrow points to this table. The left sidebar shows a tree view of the document structure, with a red box highlighting the 'Document Header' section.

The Professional Services Advertisement Main Document, opened, checked out, with placeholders displayed

The Main Document is the combination of static text from a contract document's template and the variable information entered into the project form. In addition, the Main Document may contain blank fields ready for manual input.


















When opening a Main Document of any type of contract, notice several fields that are grayed out. These fields will contain the variable information entered into the project form, or they are placeholders as reminders that variable information must be entered into the Main Document itself.



These types of information are displayed, including a table into which variable information can be entered manually, denoted with the red arrow in the above illustration. To enter information into the contract, in the Navigator, denoted by the red box, note several areas that are prefaced with five Xs (XXXXX). It is best to expand the entire Navigator to view all of those areas and navigate the document using the document outline. Once the necessary information has been added, the line with the Xs turns blue in the Navigator. (**NOTE:** The blue color does not alter the final contract itself.)


See also [Tips and Tricks for Navigating and Editing the Main Document](#), later in this guide.

- Upside Software

[Home](#) ▶ [Contracts](#)

Saved Views:   Search

Project Code: 

4. Enter the desired project number in the **Project Code** field.
5. Click the **Search** command button.
6. Select the contract to edit.
NOTE: If selected, the contract will display a black arrow next to it.
7. Edit the contract:
 - a. In the Menu Pane, expand the **Header** group.
 - b. Under the Header group, expand the **Documents** group.
 - c. Select the **Main Document** option.

The screenshot displays the 'Upside Contract Version 6' application. The interface is divided into several sections:

- Top Bar:** Includes 'Upside Software' branding, navigation links (Home, Contracts, Main Document, Form Entry, Forms, Projects, Reports, Templates, Personal Settings, Help), and configuration/help options.
- Left Sidebar:** A tree view showing the document structure:
 - Home
 - Contracts
 - Contract Request
 - Contracts
 - Header
 - Notes
 - Control List
 - Assign
 - Documents
 - Form Document (selected)
 - Inbound Emails
 - Outbound Emails
 - Forms
 - Related Records
 - Word ID
 - Workflow
 - Stakeholders
 - Compliance
 - Performance
 - Events
 - Deliverables
 - Inquiry
 - Projects
 - Reference Tables
 - Reports
 - Templates
 - Personal Settings
 - Help
- Main Document Area:**
 - Document Header:** Shows 'Contract No: 01-22', 'Contract Status: Edit Mode', 'Spp No: 0', 'Contractor: GEC', 'Start Date: 4/17/2008', and 'Contractor Name: Dickerson Engineering Inc.'.
 - Document Content:**
 - Document Header:** 'OWNER-PROFESSIONAL SERVICES CONSULTANT AGREEMENT'.
 - Section:** 'UNIVERSITY OF ILLINOIS'.
 - Text:** 'THIS AGREEMENT, made and entered into in the City of [Contract Hdr: Agreement Location], State of Illinois, as of the date of the last signature of the parties hereto, by and between the BOARD OF TRUSTEES OF THE UNIVERSITY OF ILLINOIS, a body corporate and politic of the State of Illinois, hereinafter referred to as "Owner," and
 - Text:** '[Contractor: CName], [Contractor: Address], [Contractor: City], [Contractor: State], [Contractor: Zip]'.
 - Text:** 'a) [Contract Hdr: Business Entity Type] existing under the laws of the State of [Contract Hdr: Laws of the State of], hereinafter referred to as "Professional Services Consultant" whose registered agent in Illinois is: [Contract Hdr: Registered Agent Name], [Contract Hdr: Registered Agent Address], [Contract Hdr: Registered Agent City, St, Zip]'.
 - Section:** 'WITNESSETH'.
 - Text:** 'WHEREAS, the OWNER desires the Professional Services Consultant to provide professional services in connection with the ([Contract Hdr: Project Title]) ("Project") at the ([Contract Hdr: Project Location]) campus of the University of Illinois; and
 - Text:** 'WHEREAS, the Project is to be developed with a Construction Budget of [Contract Hdr: Total Project Budget], including programmed contingency and a Furniture, Fixtures and Equipment (FFE) Budget of \$40,000
 - Text:** 'NOW, THEREFORE, the Owner and is hereby acknowledged, agree as follows:
 - Section:** 'A. PROFESSIONAL SERVICES'.
 - Text:** 'The Professional Services Consultant shall provide professional services consisting of ([Contract Hdr: Phases within]) phases. Each phase shall be reviewed by the Owner and approved in writing prior to commencement by the Professional Services Consultant of the subsequent phase. The Owner's approval of the Professional Services Consultant's services contemplated herein shall not be for the purpose of determining the accuracy, adequacy, completeness or contribution of the Professional Services Consultant's design drawings or documents.

NOTE: The highlighted text displays field placeholders by default. To toggle between the field placeholder text and the entered data which was transferred into the contract, click the **Show Placeholder Values** (red flag) icon in the contract toolbar.

8. Click the **Check Out** icon to check out the document.

NOTE: A document cannot be edited until it is checked out.

9. Edit those sections prefixed by the blue **XXXXXX** text in the Navigator.

NOTE: Expand all the items to ensure that all necessary text editing is completed. To expand all, click the plus icon in the toolbar. To collapse all, click the minus icon.

NOTE: Get help for any item by hovering over the question mark icons in the margin area.

10. To add or delete a clause, such as a Construction On-Site Service, select the section to be edited in the Navigator (or scroll down the document) where the clause should be added and follow the directions below.

NOTE: If you add or delete clauses in the document, the agreement may require additional administrative review(s). See [Releasing Documents into the Workflow](#).

- a. Right-click on the highlighted clause.
- b. To insert a new clause below the selected clause, select **Insert Item**, then **Text**, and type the text of the new clause into the space provided.

NOTE: To add a line within a clause (not a new clause), use SHIFT+ENTER. Simply pressing ENTER will add a new clause.

- c. To delete, select **Delete Item** and click the **OK** command button in the warning dialog box.

NOTE: If a clause is accidentally added or deleted, click the **Cancel** icon in the toolbar to undo the mistake.

IMPORTANT: A deleted clause cannot be restored without manually retyping it.

11. To complete **an editable table in a document**:

- a. To add additional lines to the table, select the last row and click the **Insert Below** icon in the table toolbar. Additional positions may be entered in these lines.

NOTE: Be sure to calculate and enter the Total Hourly Rate. It will not auto-calculate in this document.

- b. To delete unused rows, select the row's left border to highlight the row, then click the **Delete Row** icon in the table toolbar.

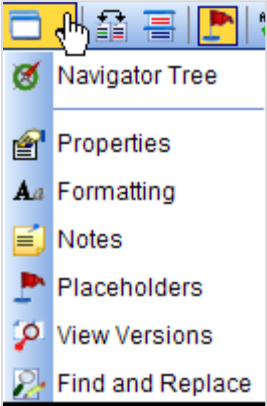
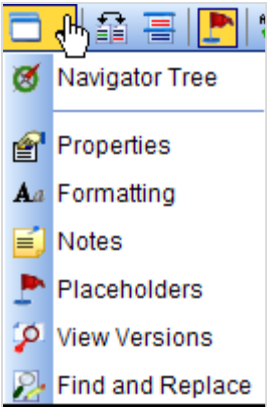
NOTE: To select more than one row, hold down the CTRL button while clicking. See also [Tips and Tricks for Navigating and Editing the Main Document](#), later in this guide.

12. To spell check the edited clauses, click the **Spelling** icon in the toolbar.

NOTE: Because only a small number of clauses need changing in the document, the spell checker checks the document clause by clause. Highlight the clause to be checked first, and then click the Spelling icon. To continue on to the next clause, click the **Continue Spell Check** icon in the margin.

-
13. When editing all of the necessary fields is complete, click the **Save** command button to save the document.
 14. Click the **Print Preview** icon in the toolbar to begin the Print Preview process.
 15. Click the **Prepare Document** command button.
NOTE: If you are using a pop-up blocker, you may need to give the browser permission to open the document.
 16. Review the document as a PDF.
 17. Click the **Check In** icon in the toolbar to check in the document.
NOTE: Remember to check in the document or it can't be released into the workflow.
 18. To forward the document for review, in the **Workflow Response** drop-down field, select **Forward**.
NOTE: See [Forwarding a Contract Document](#), later in this guide.
IMPORTANT: If you Release instead of Forward the document, by mistake, the document enters the approval workflow. In order to recover and forward as intended, ask the next approver (most likely the Director) to reject the approval to make the Forward option available to you.
 19. To release it into the workflow, in the **Workflow Response** drop-down field, select **Release**.
NOTE: See [To Release a Contract Document into the Workflow](#), later in this guide.

Navigation Tips

Navigation and Display	Do this:
To Expand the Navigator Tree:	To expand all, click the plus icon in the Toolbar, above the Navigator.
To Collapse the Navigator Tree:	To collapse all, click the minus icon in the Toolbar, above the Navigator.
To Open the Navigator Tree:	Drop down the menu and select Navigator Tree . 
To Close the Navigator Tree:	Click the Close icon
To Open the Properties Pane:	Drop down the menu and select Properties . 
To Close the Properties Pane:	Click the Close icon
To Maximize the Document Window:	Click the Maximize Editor icon. This action closes the Navigator Tree. NOTE: When you Maximize the Editor, the <i>Upside</i> Navigator minimizes.
To Restore the Document Window:	Click the Maximize Editor icon again.


To Restore the Upside Navigator:	<p>Click on the small arrow in the thin line near the left edge of the window.</p> 
To Find Text Requiring Editing:	<p>Select the XXXXX prefix within the Navigator Tree.</p> <p>OR</p> <p>Scroll down the document and look for the Question Mark icon.</p>
To Edit:	<p>Select the clauses marked with XXXXX within the document.</p> <p>Type the desired text in the space provided.</p>
Go to the top of the Main Document:	Click on Document Header in the Navigator Tree.
Go to the bottom of the Main Document:	Click on the last item in the Navigator Tree.

Table Editing	Do this:
To Perform Tasks in a Table:	To activate the Table Toolbar, click anywhere in the table.
To Insert a Table Row, Above:	Click in the correct row and click the Insert Above icon.
To Insert a Table Row, Below:	Click in the correct row and click the Insert Below icon.
To Delete a Table Row:	Click in the correct row or select the row's left border to highlight the row and click the Delete Row icon.
To Select Multiple Rows:	Hold down the CTRL key while clicking.

Professional Services Agreement

The screenshot displays the UpsideContract 6 TRAINING software interface. The left sidebar contains a navigation menu with options like Home, Contracts, Budgeting, Contract Requests, and Documents. The main window shows the 'Main Document' for a contract titled 'U-1'. The document is in 'Edit Mode' and includes fields for Contract No., Supp No., Start Date, Contractor, and Contractor Name. The document content is a 'Professional Services Agreement' between the University of Illinois and a Professional Services Consultant. The agreement includes sections for 'WITNESSETH', 'WHEREAS, the Owner...', 'THIS AGREEMENT, made and entered into...', and 'NOW, THEREFORE, the Owner and the Professional Services Consultant...'. The document is formatted with a table of contents on the left and a main text area on the right.

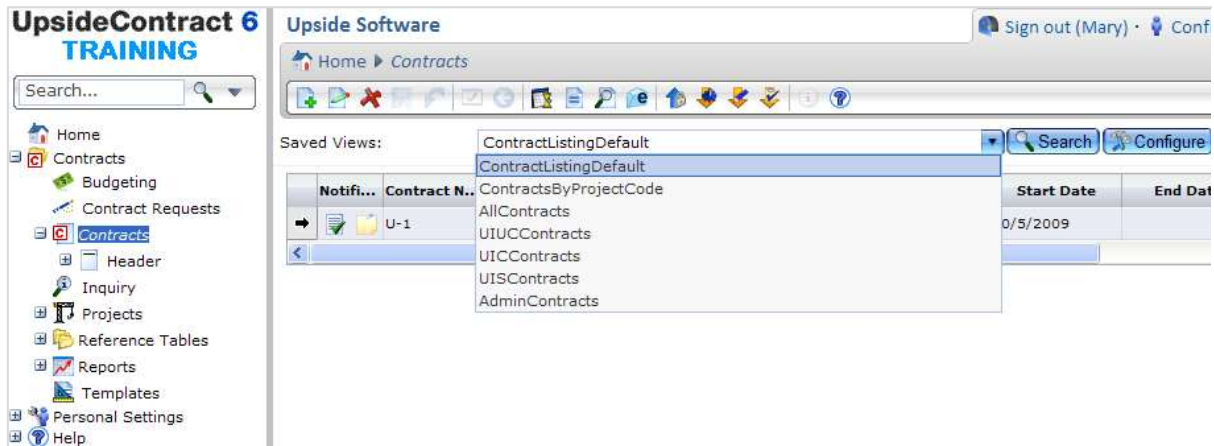
Almost all of the information necessary to complete the Professional Services Agreement will have been provided when the Project form Professional Services tab and the Contract Request are completed. Additional information is required to complete the agreement. Some Basic and Supplemental services may need to be added or deleted as appropriate. To complete the contract, add specific information as noted in [Appendix B: Optional and Editable Fields in the Professional Services Agreement](#).

Before a Professional Services Agreement can be completed, the user must already have:

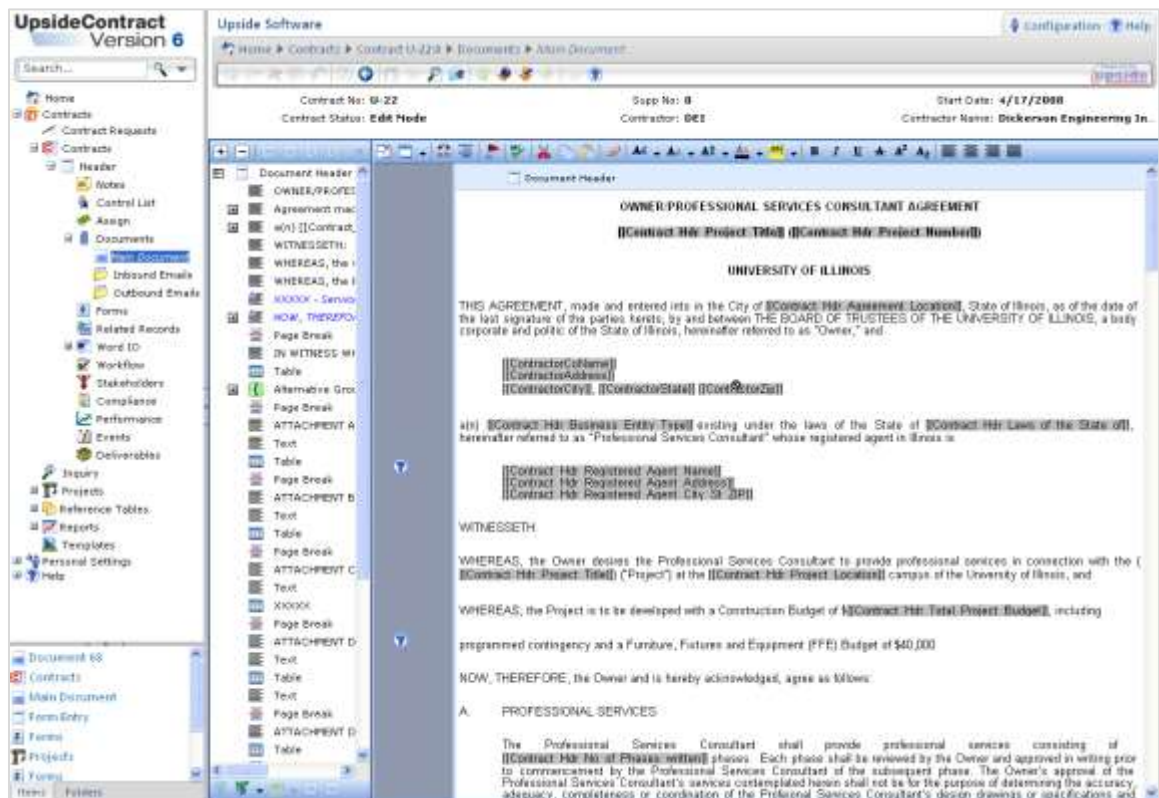
- Completed a Contract Request for the Professional Services Agreement.

Complete a Professional Services Agreement:

1. In the Menu Pane, expand the **Contracts** group.
2. Select the **Contracts** sub-menu option.
3. In the **Saved Views** drop-down field, select **AllContracts** or select the campus-appropriate saved view.



4. Select the contract to edit.
5. Edit the **Professional Services Agreement (PSA)**:
 - a. In the Menu Pane, expand the **Header** group.
 - b. Under the Header group, expand the **Documents** group.
 - c. Select the **Main Document** option.



NOTE: The highlighted text displays field placeholders by default. To toggle between the field placeholder text and the entered data which was transferred into the contract, click the **Show Placeholder Values** (red flag) icon in the contract toolbar.

-
6. Click the **Check Out** icon to check out the document.
NOTE: A document cannot be edited until it is checked out.
 7. Edit those sections prefixed by the blue **XXXXXX** text in the Navigator.
NOTE: Expand all the items to ensure that all necessary text editing is completed. To expand all, click the plus icon in the toolbar. To collapse all, click the minus icon.
NOTE: To view a list of all editable areas in the Professional Services Agreement Main Document, see [Appendix B: Optional and Editable Fields in the Professional Services Agreement](#).
NOTE: Get help for any item by hovering over the question mark icons in the margin area.
 8. To add or delete a clause, such as a Construction On-Site Service, select the section to be edited in the Navigator (or scroll down the document) where the clause should be added and follow the directions below.
NOTE: If you add or delete clauses in the document, the agreement may require additional administrative review(s). See [Releasing Documents into the Workflow](#).
 - a. Right-click on the highlighted clause.
 - b. To insert a new clause below the selected clause, select **Insert Item**, then **Text**, and type the text of the new clause into the space provided.
 - c. **NOTE:** To add a line within a clause (not a new clause), use SHIFT+ENTER. Simply pressing ENTER will add a new clause.
 - d. To delete, select **Delete Item** and click the **OK** command button in the warning dialog box.
NOTE: If a clause is accidentally added or deleted, click the **Cancel** icon in the toolbar to undo the mistake.
IMPORTANT: A deleted clause cannot be restored without manually retyping it.
 9. To complete **Attachment B – Hourly Rate Schedules**:
 - a. To ensure auto-calculation of rates, the first 20 positions should be added using the Project Form, not the Main Document.
NOTE: If you add positions to the Hourly Rate Schedule, the Total Hourly Rate will not auto-calculate. You must calculate that rate and enter the amount manually.
 - b. To add additional lines to the table, select the last row and click the **Insert Below** icon in the table toolbar. Additional positions may be entered in these lines.
NOTE: Be sure to calculate and enter the Total Hourly Rate. It will not auto-calculate in this document.
 - c. To delete unused rows, select the row's left border to highlight the row, then click the **Delete Row** icon in the table toolbar.
NOTE: To select more than one row, hold down the CTRL button while clicking. See also [Tips and Tricks for Navigating and Editing the Main Document](#), earlier in this guide.

10. To complete **Attachment C – Time of Completion**:

- a. Type in the dates for the phases that will be used in the agreement.

NOTE: Use the date format MM/DD/YYYY. Tab through the cells in the table.

- b. Delete any phase(s) that will not be used in the agreement by deleting the row(s) in the table. (See [Tips and Tricks for Navigating and Editing the Main Document](#), earlier in this guide.)

11. To complete **Attachment D – PSC / Subconsultant Work Summary**:

- a. In the **PSC Subconsultant(s) Name** column, type in the name of the Professional Services Subconsultant.

- b. In the **Service(s) Provided (See Note 1)** column, type in the Service for each Name listed in the first column.

NOTE: Be sure to follow the directions in Note 1, as quoted below:

Note 1: PSC and Subconsultant(s) shall be entered separately and all applicable services for each firm identified. This will require the PSC/Subconsultant name listed once for each firm, but list multiple services if participating in more than one service.

NOTE: Services may be added, edited, combined, or deleted, as necessary.

- c. In the **Total Contract Value**, type in the total contract value for the row's firm and service.
- d. In the **Percentage of PSC Agreement** column, type in the percentage of the entire Professional Services Agreement that the service's amount reflects.
- e. In the **CMS MAFBE Status (MBE, FBE, FMB, PBE, VOSB, SDVOSB, or N/A)** column, type in the appropriate designation:

- MBE.
- FBE.
- FMB.
- PBE.
- VOSB.
- SDVOSB.
- N/A.

- f. Repeat steps **a** through **e** for each named firm.
- g. To add additional lines to the table, select the last row and click the **Insert Below** icon in the table toolbar. Additional positions may be entered in these lines.
- h. To delete unused rows, select the row's left border to highlight the row, then click the **Delete Row** icon in the table toolbar.

NOTE: To select more than one row, hold down the CTRL button while clicking. See also [Tips and Tricks for Navigating and Editing the Main Document](#), earlier in this guide.

12. To spell check the edited clauses, click the **Spelling** icon in the toolbar.

NOTE: Because only a small number of clauses need changing in the document, the spell checker checks the document clause by clause. Highlight the clause to be checked first, and then click the Spelling icon. To continue on to the next clause, click the **Continue Spell Check** icon in the margin.

13. When editing all of the necessary fields is complete, click the **Save** command button to save the document.

14. Click the **Print Preview** icon in the toolbar to begin the Print Preview process.

15. Click the **Prepare Document** command button.

NOTE: If you are using a pop-up blocker, you may need to give the browser permission to open the document.

16. Review the document as a PDF.

17. Click the **Check In** icon in the toolbar to check in the document.

NOTE: Remember to check in the document or it can't be released into the workflow.

18. To forward the document for review, in the **Workflow Response** drop-down field, select **Forward**.

NOTE: See [Forwarding a Contract Document](#), later in this guide.

IMPORTANT: If you Release instead of Forward the document, by mistake, the document enters the approval workflow. In order to recover and forward as intended, ask the next approver (most likely the Director) to reject the approval to make the Forward option available to you.

19. To release it into the workflow, in the **Workflow Response** drop-down field, select **Release**.

NOTE: See [To Release a Contract Document into the Workflow](#), later in this guide.

Professional Service Consultant Award Letter

The screenshot displays the UpsideContract 6 PRODUCTION software interface. The left sidebar contains a navigation tree with categories like Contracts, Documents, Forms, and Reports. The main window shows a contract document titled 'Contract U-40' in 'Edit Mode'. The document header includes fields for Contract No., Supp No., Start Date (11/12/2009), and Contractor Name (Hanson Professional Ser...). The document body contains a letter from Hanson Professional Services, Inc. regarding the Beckman MRE Suite Remodel project. The letter includes details about a professional services agreement, payment options (ACH/Direct Deposit), and a request for electronic payment. The letter is signed by Mary Nelson, PM/pec, and includes two enclosures.

Contract Requests may also be used to create Letters and Notices. After creating the Contract Request for the Professional Services Award letter, the user will need to edit the Main Document.

NOTE: A Contract Request may be exited and resumed later. See [To Exit and Resume a Contract Request](#), earlier in this guide.

Create a PSC Award Letter:

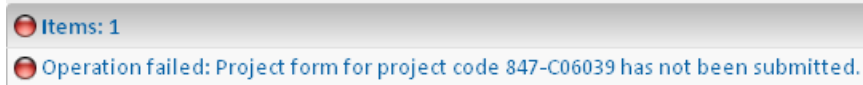
1. Begin a **Contract Request**. See [Initiating a Contract Request](#), earlier in this guide.
2. In the “What type of contract?” area, choose the **Professional Services – Award Letter** selection.
3. Click the **Next Question** command button.
4. Confirm the **Request Header Entry** information.
5. Click the **Next** command button.
6. On the **Project Selection** page, drop down the **Project Code** field and select the project.

OR

In the **Filter for drop-down list** field, type in the project number and click the **Apply Filter** command button. Select the project from the drop-down list.

7. Click the **Next** command button.

NOTE: If the following error message appears, return to the Project Forms area and submit the previously entered data by clicking on **Submit** command button.



The read only Project Form will now appear for the selected project. Verify that sufficient project information has been entered to create the current contract.

8. Click the **Next** command button.
9. Review the READ ONLY version of the project form.

NOTE: If errors are discovered on the contract request version of the project form, exit the Contract Request process, return to the project form and modify it, and then re-submit to import the corrected information.

10. Click the **Next** command button.
11. Read the Contract Request Input page.

NOTE: Be aware of the following sentence: “When you finish the Contract Request, go to the Contracts view to locate and complete any editing of the contract document before releasing for approval.”

12. Click the **Next** command button.
13. Click the **Finish** command button.

IMPORTANT: Write down the Contract Number for future reference.

14. Edit the letter, to add the correct date.
 - a. In the Menu Pane, expand the **Header** group.
 - b. Under the Header group, expand the **Documents** group.
 - c. Select the **Main Document** option.
 - d. To give more screen space, close the Properties pane by clicking its **Close** icon.
 - e. Click the **Check Out** icon in the toolbar to check out the document.
 - f. Click the clause at the top of the letter that says TYPE DATE HERE to highlight it.

OR

Select the blue word **Text** in the Navigator and the clause will be highlighted in yellow.

 - g. Highlight the words **TYPE DATE HERE**, and type the letter’s date.
 - h. Click the **Save** icon in the toolbar.

15. Click the **Print Preview** icon in the toolbar.
16. Click the **Prepare Document** command button.

NOTE: If you are using a pop-up blocker, you may need to give the browser permission to open the document.

-
17. Review the document as a PDF.
 18. Click the **Check In** icon in the toolbar to check in the document.
NOTE: Remember to check in the letter or it can't be released into the workflow.
 19. To release the letter into the workflow for approval, in the **Workflow Response** drop-down field, select **Release**.
NOTE: See [Releasing Documents into the Workflow](#), later in this guide.
NOTE: Check the status of any item released in the workflow by viewing the Status column in the Contracts view.
 20. When approval has occurred, follow steps 14-16 to view the PDF and print the letter.

Construction Manager Contract

The screenshot displays the Upside Software interface for editing a Construction Manager Agreement. The top navigation bar shows the path: Home > Contracts > Contract C-34150 > Documents > Main Document. The document header includes the following information:

- Contract No: C-3415
- Contract Status: Edit Mode
- Supp No: 0
- Contractor: Tmr1339
- Start Date: 6/18/2012
- Contractor Name: Turner Construction Company

The main document area shows the following text:

OWNER/CONSTRUCTION MANAGER
PROFESSIONAL SERVICES AGREEMENT

[[Contract Hdr Project Title]] [[Contract Hdr Project Number]]

UNIVERSITY OF ILLINOIS

THIS AGREEMENT, made and entered into in the City of [[Contract Hdr Agreement Location]], State of Illinois, as of the date of the last signature of the parties hereto, by and between THE BOARD OF TRUSTEES OF THE UNIVERSITY OF ILLINOIS, a body corporate and politic of the State of Illinois, hereinafter referred to as "Owner," and

[[Contract Hdr ContractorName]]
[[Contract Hdr ContractorAddress]]
[[Contract Hdr ContractorCity]] [[Contract Hdr ContractorState]] [[Contract Hdr ContractorZip]]

a(n) [[Contract Hdr Business Entity Type]] existing under the laws of the State of [[Contract Hdr Laws of the State of]], hereinafter referred to as "Construction Manager" whose registered agent in Illinois is

[[Contract Hdr Registered Agent Name]]
[[Contract Hdr Registered Agent Address]]
[[Contract Hdr Registered Agent City St Zip]]

WITNESSETH:

WHEREAS, Owner desires Construction Manager to provide professional services in connection with the [[Contract Hdr Project Description Detailed]] ("Project") at the [[Contract Hdr Project Location]] campus of the University of Illinois, and

WHEREAS, the Project is to be developed with an estimated Construction Budget of \$[[Contract Hdr Total Project Budget]] including programmed contingency and a Furniture, Fixtures and Equipment (FFE) Budget of \$_____

NOW, THEREFORE, the Owner and the Construction Manager, for the consideration hereinafter named and for other good and valuable consideration, the sufficiency of which is hereby acknowledged, agree as follows:

A. PROFESSIONAL SERVICES

Almost all of the information necessary to complete the Construction Manager Agreement will have been provided when the Project form Construction Manager tab and the Contract Request are completed. Additional information, required to complete the agreement, should be provided by the Project Manager.

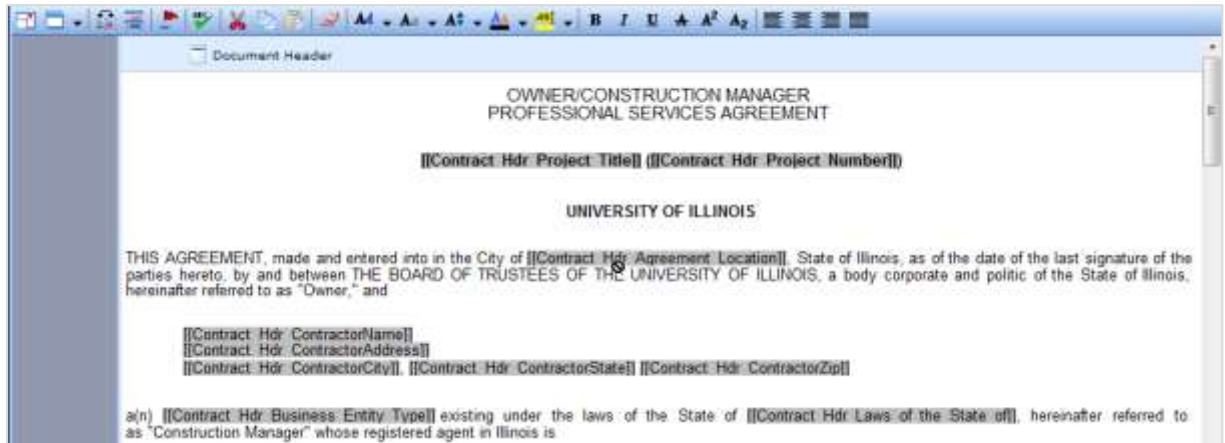
Before a Construction Manager Agreement can be completed, the user must already have:

- Completed a Contract Request for the Construction Manager Agreement.
- Variable information about the CM company, such as personnel, project schedule, and CM subconsultant data.

Complete a Construction Manager Agreement:

1. In the Menu Pane, expand the **Contracts** group.
2. Select the **Contracts** sub-menu option.
3. In the **Saved Views** drop-down field, select **AllContracts** or select the campus-appropriate saved view.
4. Select the contract to edit.
5. Edit the **Construction Manager Agreement**:
 - a. In the Menu Pane, expand the **Header** group.

- b. Under the Header group, expand the **Documents** group.
- c. Select the **Main Document** option.



NOTE: The highlighted text displays field placeholders by default. To toggle between the field placeholder text and the entered data which was transferred into the contract, click the **Show Placeholder Values** (red flag) icon in the contract toolbar.

6. Click the **Check Out** icon to check out the document.

NOTE: A document cannot be edited until it is checked out.

7. Edit those sections prefixed by the blue **XXXXXX** text in the Navigator.

NOTE: Expand all the items to ensure that all necessary text editing is completed. To expand all, click the plus icon in the toolbar. To collapse all, click the minus icon.

NOTE: Get help for any item by hovering over the question mark icons in the margin area.

8. To add or delete a clause, such as a Construction On-Site Service, select the section to be edited in the Navigator (or scroll down the document) where the clause should be added and follow the directions below.

NOTE: If you add or delete clauses in the document, the agreement may require additional administrative review(s). See [Releasing Documents into the Workflow](#).

- a. Right-click on the highlighted clause.
- b. To insert a new clause below the selected clause, select **Insert Item**, then **Text**, and type the text of the new clause into the space provided.

NOTE: To add a line within a clause (not a new clause), use SHIFT+ENTER. Simply pressing ENTER will add a new clause.

- c. To delete, select **Delete Item** and click the **OK** command button in the warning dialog box.

NOTE: If a clause is accidentally added or deleted, click the **Cancel** icon in the toolbar to undo the mistake.

IMPORTANT: A deleted clause cannot be restored without manually retyping it.

9. To complete **Attachment B – Hourly Rate Schedules:**

- a. To ensure auto-calculation of rates, the first 20 positions should be added using the Project Form, not the Main Document.
- b. To add additional lines to the table, select the last row and click the **Insert Below** icon in the table toolbar. Additional positions may be entered in these lines.

NOTE: Be sure to calculate and enter the Total Hourly Rate. It will not auto-calculate in this document.

- c. To delete unused rows, select the row's left border to highlight the row, then click the **Delete Row** icon in the table toolbar.

NOTE: To select more than one row, hold down the CTRL button while clicking. See also [Tips and Tricks for Navigating and Editing the Main Document](#), earlier in this guide.

10. To complete **Attachment C – Time of Completion:**

- a. Type in the dates for the phases that will be used in the agreement.
NOTE: Use the date format MM/DD/YYYY. Tab through the cells in the table.
- b. Delete any phase(s) that will not be used in the agreement by deleting the row(s) in the table. (See [Tips and Tricks for Navigating and Editing the Main Document](#), earlier in this guide.)

11. To complete **Attachment D – PSC / Subconsultant Work Summary:**

- a. In the **PSC Subconsultant(s) Name** column, type in the name of the Professional Services Subconsultant.
- b. In the **Service(s) Provided (See Note 1)** column, type in the Service for each Name listed in the first column.

NOTE: Be sure to follow the directions in Note 1, as quoted below:

Note 1: PSC and Subconsultant(s) shall be entered separately and all applicable services for each firm identified. This will require the PSC/Subconsultant name listed once for each firm, but list multiple services if participating in more than one service.

NOTE: Services may be added, edited, combined, or deleted, as necessary.

- c. In the **Total Contract Value**, type in the total contract value for the row's firm and service.
- d. In the **Percentage of PSC Agreement** column, type in the percentage of the entire Professional Services Agreement that the service's amount reflects.
- e. In the **CMS MAFBE Status (MBE, FBE, FMB, PBE, VOSB, SDVOSB or N/A)** column, type in the appropriate designation:
 - MBE.
 - FBE.
 - FMB.
 - PBE.

-
- VOSB.
 - SDVOSB.
 - N/A.
- f. Repeat steps **a** through **e** for each named firm.
- g. To add additional lines to the table, select the last row and click the **Insert Below** icon in the table toolbar. Additional positions may be entered in these lines.
- h. To delete unused rows, select the row's left border to highlight the row, then click the **Delete Row** icon in the table toolbar.
- NOTE:** To select more than one row, hold down the CTRL button while clicking. See also [Tips and Tricks for Navigating and Editing the Main Document](#), earlier in this guide.
12. To spell check the edited clauses, click the **Spelling** icon in the toolbar.
- NOTE:** Because only a small number of clauses need changing in the document, the spell checker checks the document clause by clause. Highlight the clause to be checked first, and then click the Spelling icon. To continue on to the next clause, click the **Continue Spell Check** icon in the margin.
13. When editing all of the necessary fields is complete, click the **Save** command button to save the document.
14. Click the **Print Preview** icon in the toolbar to begin the Print Preview process.
15. Click the **Prepare Document** command button.
- NOTE:** If you are using a pop-up blocker, you may need to give the browser permission to open the document.
16. Review the document as a PDF.
17. Click the **Check In** icon in the toolbar to check in the document.
- NOTE:** Remember to check in the document or it can't be released into the workflow.
18. To forward the document for review, in the **Workflow Response** drop-down field, select **Forward**.
- NOTE:** See [Forwarding a Contract Document](#), later in this guide.
- IMPORTANT:** If you Release instead of Forward the document, by mistake, the document enters the approval workflow. In order to recover and forward as intended, ask the next approver (most likely the Director) to reject the approval to make the Forward option available to you.
19. To release it into the workflow, in the **Workflow Response** drop-down field, select **Release**.
- NOTE:** See [Releasing Documents into the Workflow](#), later in this guide.

Front End Documents

Contract Request – Front End Documents – Contract Request Input Page, with variable information illustrated

The Front End Documents include, depending on whether they're single or multiple (S or M), the following specifications (CSI MasterFormat 2004):²

- Section 00 10 00S – [Notice to Bidders \(Single Contract\)](#).
- Section 00 10 00M – [Notice to Bidders \(Multiple Contract\)](#).
- Section 00 20 00 – [General Instructions to Bidders](#).
- Section 00 40 00S – [Proposal \(Single Contract\)](#).
- Section 00 40 00M – [Proposal \(Multiple Contract\)](#).
- Section 00 45 00 – [Annual Prequalification Statement](#).
- Section 00 46 00 – [Prequalification Statement](#).
- Section 00 50 00S – [Standard Contract Execution Forms \(Single\)](#).
- Section 00 50 00M – [Standard Contract Execution Forms \(Multiple\)](#).
- Section 00 60 00S – Standard Contract Administration Forms (Single) *[interactive forms]*.
 - [Index to the Standard Contract Administration Forms](#).
 - [Contractor's Schedule of Values](#).

² If you are using the electronic form of this guide, the displayed links to these specifications, will go directly to the UOCP&RES website and open the sample specification.

-
- Payment Application: Part IA – [Payment Certificate for Contractor without Assigned Subcontractor.](#)
 - Contractor's Payment Application: Part II – [Schedule of Work.](#)
 - Contractor's Payment Application: Part III – [Affidavit and Partial Lien Waiver.](#)
 - Contractor's Payment Application: Part IV – [Employee Utilization Report.](#)
 - [Construction Contract Change Order for Contractor \(no assignment\).](#)
 - [Emergency Work Authorization \(EWA\) / Field Directive \(FD\).](#)
 - [Contractor's Affidavit for Reduction in Retainage.](#)
 - [Contractor's Affidavit for Final Payment.](#)
 - [Contractor's Final Release and Waiver of Lien.](#)
 - [Final Release and Waiver of Lien for Subcontractors/Vendors/Suppliers.](#)
 - [Certificate of Substantial Completion.](#)
 - [Contractor/Subcontractor Request for Proposal Breakdown Summary.](#)
 - [Professional Services Billing Form.](#)
 - Section 00 60 00M – Standard Contract Administration Forms (Multiple) *[interactive forms]*
 - [Index to the Standard Contract Administration Forms.](#)
 - [Contractor's Schedule of Values.](#)
 - Payment Application: Part I – [Payment Certificate.](#)
 - Contractor's Payment Application: Part II – [Schedule of Work.](#)
 - Contractor's Payment Application: Part III – [Affidavit and Partial Lien Waiver.](#)
 - Contractor's Payment Application: Part IV – [Employee Utilization Report.](#)
 - [Construction Contract Change Order for Contractor \(assigned subcontractors\).](#)
 - [Construction Contract Change Order for Contractor \(with assigned subcontractors\).](#)
 - [Emergency Work Authorization \(EWA\) / Field Directive \(FD\).](#)
 - [Contractor's Affidavit for Reduction in Retainage.](#)
 - [Contractor's Affidavit for Final Payment.](#)
 - [Contractor's Final Release and Waiver of Lien.](#)
 - [Final Release and Waiver of Lien for Subcontractors/Vendors/Suppliers.](#)
 - [Certificate of Substantial Completion.](#)
 - [Contractor/Subcontractor Request for Proposal Breakdown Summary.](#)
 - [Professional Services Billing Form](#)
 - Section 00 70 00 – [General Conditions.](#)
 - Section 00 90 00 – [Addenda and Modifications.](#)

These bidding documents, forms, General Conditions, and all other non-construction contract documents are now contained in a single document. Attachments will be added to the Front End Document, including, but not limited to, Prevailing Wages, and place them appropriately within it.

Before beginning:

- Ensure the Professional Services and Bidding portions of the Project Form are complete.
- Ensure the Project Forms have been submitted.

Create Front End Documents:

1. Begin a **Contract Request**. See [Initiating a Contract Request](#), earlier in this guide.
2. In the “What type of contract?” area, choose the **Construction – Front End Documents** selection.
3. Click the **Next Question** command button.
4. Confirm the **Request Header Entry** information.
5. Click the **Next** command button.
6. On the **Project Selection** page, drop down the **Project Code** field and select the project.

OR

In the **Filter for drop-down list** field, type in the project number and click the **Apply Filter** command button. Select the project from the drop-down list.

7. Click the **Next** command button.

NOTE: If the following error message appears, return to the Project Forms area and submit the previously entered data by clicking on **Submit** command button.



The read only Project Form will now appear for the selected project. Verify that sufficient project information has been entered to create the current contract.

8. Click the **Next** command button.
9. Review the READ ONLY version of the project form.

NOTE: If errors are discovered on the contract request version of the project form, exit the Contract Request process, return to the project form and modify it, and then re-submit to import the corrected information.

10. Click the **Next** command button.

NOTE: The Contract Request Input page for Front End Documents requires that all fields be completed before moving to the next page. If you are not prepared to do that today, you can have placeholder text, such as TBD, to each text box and today's date to the date fields, but remember to review all fields for accuracy when you return to complete the Contract Request.

11. In the **Site Examination Contact Name** field, type the name of the contact.
12. In the **Phone** field, type the phone number of the site examination contact.
13. In the **Professional Service Consultant Project documents date issued: (Reference 00 40 00 Section 5.0)** field, provide the date the documents were issued.
14. In the **Request a modification to contract text** drop-down field:
 - If no modifications are needed, accept the default answer, **No**, and SKIP to step 17.
 - If modifications are needed, select **Yes**.

The screenshot shows a software interface with two text boxes. The top text box is preceded by the instruction: "A deviation from standard contract language has been selected; therefore provide justification below." The bottom text box is preceded by the instruction: "Contract Text Modification: (If needed attach files using the next page)". Both text boxes are empty and have vertical scrollbars on their right sides.

- a. In the first text box illustrated above, type justification for the changes to be made.
- b. In the second text box illustrated above, type the contract text modification to appear in the contract. Include the section in which the change should appear.

OR

On the Attached Documents Entry screen of the Contract Request, attach a document which explains the justification for the change and its additional contract text.

NOTE: Both of the above fields are limited to 4,000 characters.

NOTE: If attaching a document to justify a change of contract language, remember NOT to choose the **Include in Document** and **Print** checkboxes.

15. Click the **Next** command button.

16. To attach a document:

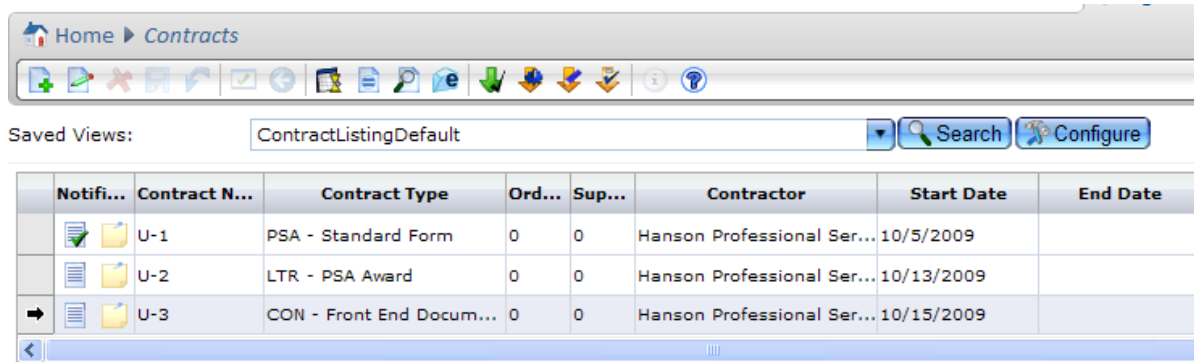
- a. Click the **Add** icon in the toolbar.
- b. Near the bottom of the screen, in the **Document Title** text box, type a name for the attachment.
- c. In the **Document Date** text box, type the date of the document, or use the date navigator to navigate to the appropriate date.
- d. In the **Type** area, choose the **Attached** radio button.
- e. Click the **Select** command button and navigate to the folder where the file resides.
- f. Select the filename.
- g. Click the **Open** command button.
- h. To have the file appear as part of the contract, choose the **Print** and **Include in Document** checkboxes.

NOTE: If the attachment is just for reference, do not choose these options. To view all attachments to a contract, see [Adding and Viewing Document Attachments](#).

17. When the attachment(s) have been completed (if any), click the **Finish** command button.

IMPORTANT: Write down the Contract Number. You will need to know this later.

18. In the Menu Pane, expand the **Contracts** group.
19. Select the **Contracts** sub-menu option.



20. If necessary, select a different view from the **Saved Views** drop-down field.
21. Select the item just created.
22. Click the **Print Preview** icon in the toolbar.
23. Click the **Prepare Document** command button.

NOTE: If you are using a pop-up blocker, you may need to give the browser permission to open the document.
24. Review the document as a PDF.
25. Click the **Check In** icon in the toolbar to check in the document.

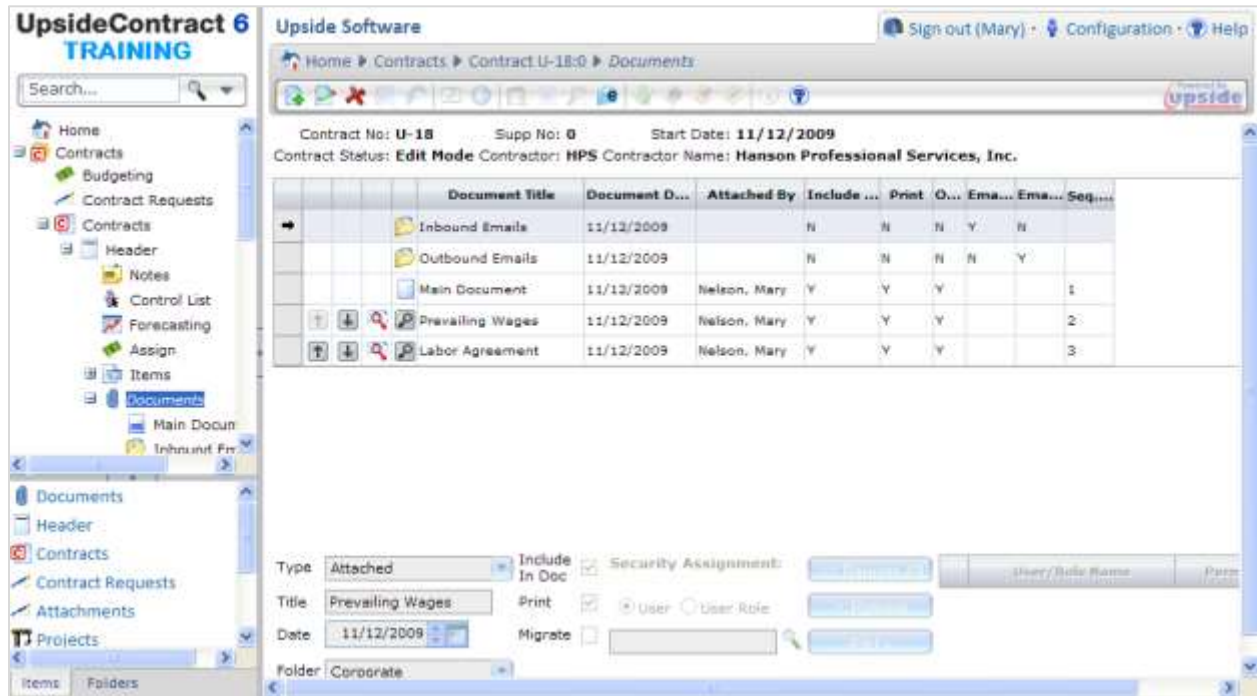
NOTE: Remember to check in the document or it can't be released into the workflow.
26. To forward the front end documents for review, in the **Workflow Response** drop-down field, select **Forward**.

NOTE: See [Forwarding a Contract Document](#), later in this guide.
27. To release the front end documents into the workflow for approval, in the **Workflow Response** drop-down field, select **Release**.

NOTE: See [Releasing Documents into the Workflow](#), later in this guide.

NOTE: To correct an error after the Front End Document has been reviewed, see [Modifying a Contract Document](#), later in this guide.

Add and View Document Attachments



The Documents view, with the contract document (front end documents) and attachments listed

Documents may be attached to:

- Contract Requests.
- Contracts.

The following procedure describes how to work with attachments to Contracts. To attach documents to Contract Requests, see [Initiating a Contract Request](#), earlier in this guide. To add, view, or delete an attachment to a Contract Document, the user can do so from the Documents view.

Add Contract Document Attachments:

1. From the **Contracts** listing view, select the document.
2. Click the **Check Out** icon in the toolbar to check out the document.
3. In the Menu Pane, expand the **Header** group.
4. Under the Header group, expand the **Documents** group.
5. Click the **Add** icon in the toolbar.

Type: Attached

Uploads: Select X Remove Title: Folder: -Select-

6. In the **Type** drop-down field, select **Attached**.
 7. In the Uploads area, click the **Select** command button.
 8. Navigate to the file to upload and select it.
 9. In the **Title** field, enter a title for the uploaded document.
 10. In the **Folder** drop-down field, select **Corporate**.
 11. To have the file appear as part of the contract, choose the **Print** and **Include in Document** checkboxes.
- NOTE:** If the attachment is just for reference, do not choose these options.
- To view all attachments to a contract, see [Adding and Viewing Document Attachments](#).
12. Click the **Save** icon in the toolbar.

The uploaded documents appear in the view.

				Document Title	Document D...	Attached By	Include In Doc	Print	O...	Ema...	Ema...	Seq....
→				Inbound Emails	11/12/2009		N	N	N	Y	N	
				Outbound Emails	11/12/2009		N	N	N	N	Y	
				Main Document	11/12/2009	Nelson, Mary	Y	Y	Y			1
	↑	↓	🔍	Labor Agreement	11/12/2009	Nelson, Mary	N	N	Y			2
	↑	↓	🔍	Prevailing Wages	11/12/2009	Nelson, Mary	N	N	Y			3

13. To add another attachment, repeat steps 8 through 12.
- NOTE:** As uploads are added, the option to add an additional attachment appears.
14. To include the attachments in the document:
 - a. Click the row to select the attachment.

Near the bottom of the screen, the Attachments area appears.

 - b. Click the **View/Edit** icon in the toolbar.
 - c. To have the file appear as part of the contract, choose the **Print** and **Include in Document** checkboxes.

NOTE: If the attachment is just for reference, do not choose these options.

 - d. Click the **Save** icon in the toolbar.

If the attachment is to be included in the document and printed, a **Y** (for Yes) appears in the table for each option. The attachments are included as part of the contract document.

Sequence Contract Document Attachments:

1. To sequence the attachments so they appear in the correct order:
 - a. Click the row to select the attachment to move.

-
- b. To make the document appear earlier, in the columns at the left, click the **Move Attachment Up** icon.
 - c. To make the document appear later, in the columns at the left, click the **Move Attachment Down** icon.

View Individual Attachments to the Contract Document:

1. From the Documents view, click the **View** (magnifying glass) icon.
The document attempts to open in a new window.
2. Depending on the attachment document type, it may be necessary to click the **Open** command button in the dialog box.

Print Preview the Contract Document with its Attachments:

1. From the Documents view, click the **Main Document** icon.
2. Click the **Print Preview** icon in the toolbar.
3. Click the **Prepare Document** command button.
NOTE: If you are using a pop-up blocker, you may need to give the browser permission to open the document.
4. Click the **Open** command button.
5. Review the document to ensure the attachments were included.

Construction Bid Advertisement

The screenshot displays the UpsideContract 6 TRAINING software interface. The top navigation bar includes 'Home', 'Contracts', 'Contract C-1420', 'Documents', and 'Main Document'. The left sidebar contains a search bar and a list of modules: Forecasting, Assign, Items, Documents, Forms, Change Orders, Related Records, Word ID, Workflow, Stakeholders, Locations, Compliance, Performance, Invoices, Holdbacks, Receipts, Events, Deliverables, Inquiry, Projects, Reference Tables, Reports, Templates, Admin, Personal Settings, and Help. The main window shows a 'Document Header' section with the following fields: University of Illinois at [Contract_Hdr_Project_Location], Bid #BA[Contract_Hdr_Project_Number], Invitation for Construction Bid: [Contract_Hdr_Project_Title], First published: [Contract_Hdr_Publish_Date], Project Description (with a table of 7 detailed descriptions), Custom Data: PLA_Used (No), Custom Data: Contract_Type (Single), Division [DCAN_Repeating], and a section for sealed bids acceptance until [Contract_Hdr_Bid_Hour_Contractor] at [Contract_Hdr_Bid_Date_Contractor]. The bottom section includes contact information for The Board of Trustees of the University of Illinois c/o [Contract_Hdr_Owner_Name], [Contract_Hdr_Owner_Address], [Contract_Hdr_Owner_City_St_ZIP], and Attention: [Contract_Hdr_Owner_Contact], EMAIL ADDRESS, PHONE #.

Before a Construction Bid Advertisement can be completed, the user must already have:

- Created a Project in **Upside**.
- Completed the Project Form's General, Professional Services, and Bidding tabs.
- Submitted the Project Form.

Create a Construction Bid Advertisement Contract Request:

1. Begin a **Contract Request**. See [Initiating a Contract Request](#), earlier in this guide.
2. In the "What type of contract?" area, choose the **Construction – Bid Advertisement** selection.
3. Click the **Next Question** command button.
4. Confirm the **Request Header Entry** information.
5. Click the **Next** command button.
6. On the **Project Selection** page, drop down the **Project Code** field and select the project.

OR

In the **Filter for drop-down list** field, type in the project number and click the **Apply Filter** command button. Select the project from the drop-down list.

NOTE: The user may exit a Contract Request and resume it later. See [To Exit and Resume a Contract Request](#), earlier in this guide.

-
7. Click the **Next** command button.
 8. Review the READ ONLY version of the project form.
NOTE: If errors are discovered on the contract request version of the project form, exit the Contract Request process, return to the project form and modify it, and then re-submit to import the corrected information.
 9. Click the **Next** command button.
 10. Read the Contract Request Input page.
 11. Click the **Next** command button.
 12. To attach a document:
 - a. Click the **Add** icon in the toolbar.
 - b. Near the bottom of the screen, in the **Document Title** text box, type a name for the attachment.
 - c. In the **Document Date** text box, type the date of the document, or use the date navigator to navigate to the appropriate date.
 - d. In the **Type** area, choose the **Attached** radio button.
 - e. Click the **Select** command button and navigate to the folder where the file resides.
 - f. Select the filename.
 - g. Click the **Open** command button.
 - h. To have the file appear as part of the contract, choose the **Print** and **Include in Document** checkboxes.
NOTE: If the attachment is just for reference, do not choose these options. To view all attachments to a contract, see [Adding and Viewing Document Attachments](#).
 13. When the attachment(s) and security assignments have been completed (if any), click the **Finish** command button.
IMPORTANT: Write down the Contract Number. You will need to know this later. If you exit the Contract Request before you click the Finish button, make a note of the Request ID so that you may return to it later.

Once the Construction Bid Advertisement Contract Request is finished, the next step is to edit the Main Document of the Advertisement to add the variable information that could not be added on the Project form. See [Editing a Main Document](#), earlier in this guide.

Construction Contract

Upside Software

Home > Contract Requests > New Contract Request

Sign out (Vince) · Configuration · Help

Contract Type Entry

Determining the contract type

What type of contract?

- ☐ Construction - Assigned Subcontractor
- ☐ Construction - Bid Advertisement
- ☐ Construction - Contractor With Assigned Subs
- ☒ Construction - Contractor With No Assignment
- ☐ Construction - Front End Documents
- ☐ Construction - Notice of Award Letter
- ☐ Construction - Notice of Award/Proceed Letter
- ☐ Construction - Notice of Intent to Award Letter
- ☐ Construction - Notice to Proceed
- ☐ Construction - Pre-Bid Meeting Information
- ☐ Construction Management - Amendment
- ☐ Construction Management - Standard Form
- ☐ Professional Services - Advertisement
- ☐ Professional Services - Amendment
- ☐ Professional Services - Award Letter
- ☐ Professional Services - Retainer Renewal Letter
- ☐ Professional Services Agreement - Retainer
- ☐ Professional Services Agreement - Short Form
- ☐ Professional Services Agreement - Standard Form
- ☒ Professional Services-RFP Consultant Advertisement

Previous Question Next Question

Prev Next Exit

Information entered on the Project forms combines with boilerplate text from the selected contract type during the Contract Request process. Once a Contract Request has been created for a construction contract, unless changes to contract language have been requested, the contract may be reviewed and sent into the workflow.

Both single and multiple contracts may be created. The following construction contracts are available within **Upside**:

- Construction – Contractor with No Assignment.
- Construction – Contractor with Assigned Subs.
- Construction – Contractor with Assigned Subcontractor.

Before beginning:

- Ensure all portions of the Project Forms are complete.
- Ensure the Project Forms have been submitted.

Create a Construction Contract:

1. Begin a **Contract Request**. See [Initiating a Contract Request](#), earlier in this guide.
2. In the “What type of contract?” area, choose one of the following selections:
 - **Construction – Assigned Subcontractor.**
 - **Construction – Contractor with Assigned Subs.**
 - **Construction – Contractor with No Assignment.**
3. Click the **Next Question** command button.
4. Confirm the **Request Header Entry** information.
5. Click the **Next** command button.
6. On the **Project Selection** page, drop down the **Project Code** field and select the project.

OR

In the **Filter for drop-down list** field, type in the project number and click the **Apply Filter** command button. Select the project from the drop-down list.

NOTE: The user may exit a Contract Request and resume it later. See [To Exit and Resume a Contract Request](#), earlier in this guide.

7. Click the **Next** command button.

NOTE: If the following error message appears, return to the Project Forms area and submit the previously entered data by clicking on **Submit** command button.



The read only Project Form will now appear for the selected project. Verify that sufficient project information has been entered to create the current contract.

8. Click the **Next** command button.
9. Review the READ ONLY version of the project form.

NOTE: If errors are discovered on the contract request version of the project form, exit the Contract Request process, return to the project form and modify it, and then re-submit to import the corrected information.
10. Click the **Next** command button.
11. On the Contract Request Input page:
 - a. If working with an **Assigned Subcontractor** contract:
 - Drop down the menu and select the contractor’s Division of Work.
 - b. If working with a **Contractor with Assigned Subs** contract:
 - Drop down the menu and select the contractor’s Division of Work.
 - Choose the checkboxes for each assigned subcontractor.
 - c. If working with a **Contractor with No Assignment** contract:
 - Drop down the menu and select the contractor’s Division of Work.

12. To request a change to the contract language, in the **Request a modification to the contract text** drop-down field:

- If no modifications are needed, accept the default answer, **No**, and SKIP to step 15.
- If modifications are needed, select **Yes**.

A deviation from standard contract language has been selected; therefore provide justification below.

Contract Text Modification: (If needed attach files using the next page)

The image shows a screenshot of a web interface. At the top, a message states: "A deviation from standard contract language has been selected; therefore provide justification below." Below this is a large, empty text box for justification. Below that, another message reads: "Contract Text Modification: (If needed attach files using the next page)". Below this second message is another large, empty text box for the contract text modification. Both text boxes have vertical scroll bars on their right sides.

- In the first text box illustrated above, type justification for the changes to be made.
- In the second text box illustrated above, type the contract text modification to appear in the contract. Include the section in which the change should appear.

OR

On the Attached Documents Entry screen of the Contract Request, attach a document which explains the justification for the change and its additional contract text.

NOTE: Both of the above fields are limited to 4,000 characters.

NOTE: If attaching a document to justify a change of contract language, remember NOT to choose the **Include in Document** and **Print** checkboxes.

13. Click the **Next** command button.

14. To attach a document:

- Click the **Add** icon in the toolbar.
- Near the bottom of the screen, in the **Document Title** text box, type a name for the attachment.
- In the **Document Date** text box, type the date of the document, or use the date navigator to navigate to the appropriate date.
- In the **Type** area, choose the **Attached** radio button.
- Click the **Select** command button and navigate to the folder where the file resides.
- Select the filename.
- Click the **Open** command button.
- To have the file appear as part of the contract, choose the **Print** and **Include in Document** checkboxes.

NOTE: If the attachment is just for reference, do not choose these options.
To view all attachments to a contract, see [Adding and Viewing Document Attachments](#).

15. Click the **Finish** command button.

IMPORTANT: Write down the Contract Number for future reference.

16. In the Menu Pane, click the **Contracts** menu item.

17. Select the row of the contract to view and a black arrow will appear.

18. Click the **Print Preview** icon in the toolbar.

19. Click the **Prepare Document** command button.

NOTE: If you are using a pop-up blocker, you may need to give the browser permission to open the document.

20. Review the document as a PDF.

21. Click the **Check In** icon in the toolbar to check in the document.

NOTE: Remember to check in the letter or it can't be released into the workflow.

22. To forward the document for review, in the **Workflow Response** drop-down field, select **Forward**.

NOTE: See [Forwarding a Contract Document](#), later in this guide.

IMPORTANT: If you Release instead of Forward the document, by mistake, the document enters the approval workflow. In order to recover and forward as intended, ask the next approver (most likely the Director) to reject the approval to make the Forward option available to you.

23. To release the letter into the workflow for approval, in the **Workflow Response** drop-down field, select **Release**.

NOTE: See [Releasing Documents into the Workflow](#), later in this guide.

NOTE: To correct an error after the document has been reviewed, see [Modifying a Contract Document](#), the next topic in this guide.

Modify a Contract Document

The screenshot displays the 'UpsideContract 6 TRAINING' software interface. The top navigation bar includes 'Home', 'Contracts', 'Contract U-50', 'Forms', and 'CONTRACT'. The main content area shows contract details: 'Contract No: U-5', 'Contract Status: Edit Mode', 'Form Name: CONIT_Contract', 'Defn ID: 14', 'Defn Version: 1', 'Supp No: 0', 'Contractor: ACC', 'Start Date: 10/21/2009', 'Contractor Name: Associated Constructors', and 'Form Status: Submitted'. Below this, the 'Contractor With Assigned Subcontractors' section is visible, showing 'Division Of Work' as '01 - General Work' and 'Number of days to substantial completion from notice to proceed' as '196'. A 'Request a modification to the contract text' dropdown is set to 'No'. The 'Divisions Of Work - Assigned Subcontractors' section lists three items: '02 - Plumbing Work', '03 - Heating Work', and '04 - Ventilation Work', all with checkboxes. At the bottom, there is a 'Submit' button, a 'Data File Upload' section with a 'Browse...' button and an 'Upload' button, and a version indicator 'Version: 1 - 10/21/2009 New'. A status bar at the very bottom shows 'Items: 2' and two messages: 'ContractReader.xml has changed. User must save form to integrate data source changes.' and 'PROJCDWS.xml has changed. User must save form to integrate data source changes.'

Occasionally, once a contract request has been completed, some data that appears in the contract may need to be modified. For example, some of the following contract details might need to be added, modified, or deleted:

- Bid Opening information has changed.
- A Division of Work was entered incorrectly.
- A Division of Work was originally entered but then not awarded.
- An additional Division of Work needs to be added, to the Front End Documents or to a construction contract.
- An Alternate or Unit Price needs to be added or deleted.
- A modification to the construction contract text is required now but was not prior to the Contract Request.

Under those and a few other circumstances, the user might consider returning to the project form, modifying the data, and then re-submitting. This is the solution if a contract request has not yet been created. However, if the Contract Request and the contract have been generated, the contract took the information provided on the Project form previously. The Contract Request will not pull in the new information. Instead, a few additional steps are necessary to correct the contract.

Modify or Correct an Existing Contract Document or Letter:

1. Correct the missing or incorrect information on the Project Form.
2. Submit the Project Form.
3. Verify that the new data is correct by print-previewing the contract.
 - a. Click the **Print Preview** icon in the toolbar.
 - b. Click the **Prepare Document** command button.

NOTE: If you are using a pop-up blocker, you may need to give the browser permission to open the document.
 - c. Click the **Open** command button.
 - d. Review the document.
 - e. Close the Adobe Acrobat document.
4. Continue with contract review and/or approvals.

See [Forwarding a Contract Document](#), later in this guide.

See [Releasing Documents into the Workflow](#), later in this guide.

NOTE: Submitting the Project form will automatically import the changes to any and all documents that are in edit mode for the associated project.

Delete a Contract Document:

A contract document that has not entered the workflow can be deleted.

1. From the **Contract** listing view, select the contract to delete.
2. Click the **Check Out** icon to check out the contract.
3. Click the **Delete** icon.
4. Click **OK** in the warning dialog box asking “Do you want to delete this record?”
5. Add a brief note about the deletion.

NOTE: A note is required in order to delete the item.
6. Click the **Save** icon in the toolbar.

Construction Letters

The following Construction Notice Letters can be generated within **Upside**:

- Construction – Notice of Award Letter.
- Construction – Notice to Proceed Letter.
- Construction – Notice of Intent to Award Letter.
- Construction – Notice of Award / Notice to Proceed Letter.

Just like the Professional Services Agreement Award letter, Construction Notices will be created using the Contract Request process and edit the variable fields in the Main Document.

Create a Construction Notice Letter:

1. Begin a **Contract Request**. See [Initiating a Contract Request](#), earlier in this guide.
2. In the “What type of contract?” area, choose one of the following selections:
 - **Construction – Notice of Award Letter.**
 - **Construction – Notice to Proceed Letter.**
 - **Construction – Notice of Intent to Award Letter.**
 - **Construction – Notice of Award / Notice to Proceed Letter.**
3. Click the **Next Question** command button.

-
4. Confirm the **Request Header Entry** information.
 5. Click the **Next** command button.
 6. On the **Project Selection** page, drop down the **Project Code** field and select the project.

OR

In the **Filter for drop-down list** field, type in the project number and click the **Apply Filter** command button. Select the project from the drop-down list.

NOTE: The user may exit a Contract Request and resume it later. See [To Exiting and Resume a Contract Request](#), earlier in this guide.

7. Click the **Next** command button.
 8. Review the READ ONLY version of the project form.
 9. Click the **Next** command button.
 10. On the Contract Request Input page:
 - a. In the **Contract Type?** drop-down field, select one:
 - Single.
 - Multiple.
 - b. For **Single**,
 - Select the appropriate Division of Work.
 - c. For **Multiple**,
 - Select the Contractor with Assigned Division of Work.
 - Choose the checkboxes for each assigned Division of Work.
 11. Click the **Next** command button.
 12. Click the **Finish** command button.
- IMPORTANT:** Write down the Contract Number for future reference.
13. In the Menu Pane, click the **Contracts** menu item.
 14. Select the row of the notice to view and a black arrow will appear.
 15. Edit the letter, to add the correct date.
 - a. In the Menu Pane, expand the **Header** group.
 - b. Under the Header group, expand the **Documents** group.
 - c. Select the **Main Document** option.
 - d. To give more screen space, close the Properties pane by clicking its **Close** icon.
 - e. Click the **Check Out** icon in the toolbar to check out the document.
 - f. Click each clause containing the word **Text**.
 - g. Edit the words in all caps, such as DATE, and type the required information.

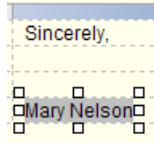
NOTE: If the cursor turns into a circle with a slash through it, the clause may not be edited. Make sure the notice is checked out.

-
- h. If there are alternate clauses within the document, delete the unused clause(s):
- Highlight the clause to be deleted.
 - Right-click and select **Delete Item**.

- i. Click the **Save** icon in the toolbar.

NOTE: Get help for any item by hovering over the question mark icons in the margin area.

- j. If the person who will sign the letter isn't the same person indicated in the signature field, click on the name and press the **Delete** key. Type in the correct person's name in the table cell above the cell where the image appeared.



- k. Click the **Save** icon in the toolbar.

16. Click the **Print Preview** icon in the toolbar.

17. Click the **Prepare Document** command button.

NOTE: If you are using a pop-up blocker, you may need to give the browser permission to open the document.

18. Review the document as a PDF.

19. Click the **Check In** icon in the toolbar to check in the document.

NOTE: Remember to check in the letter or it can't be released into the workflow.

20. To forward the document for review, in the **Workflow Response** drop-down field, select **Forward**.

NOTE: See [Forwarding a Contract Document](#), the next topic in this guide.

IMPORTANT: If you Release instead of Forward the document, by mistake, the document enters the approval workflow. In order to recover and forward as intended, ask the next approver (most likely the Director) to reject the approval to make the Forward option available to you.

21. To release the letter into the workflow for approval, in the **Workflow Response** drop-down field, select **Release**.

NOTE: See [Releasing Documents into the Workflow](#), later in this guide.

NOTE: To correct an error after the document has been reviewed, see [Modifying a Contract Document](#), earlier in this guide.

Forward a Contract Document

The screenshot shows the 'Upside Software' interface. At the top, there is a breadcrumb trail: Home > Contracts > Contract U-1:0 > Workflow Response. Below this is a toolbar with various icons. The main area displays contract information: Contract No: U-1, Supp No: 0, Start Date: 10/30/2009, Contract Status: Edit Mode, Contractor: HPS, and Contractor Name: Hanson Professional Services, Inc. There are three input fields: 'User:' with a magnifying glass icon, 'Note:' with a large text area, and 'Date:' with a calendar icon.

If any contract document needs to be forwarded to someone else for review, the user can easily do that in **Upside** and capture comments as well.

Forward a Contract Document:

1. Click the **Check In** icon to check in the document.
2. To forward the letter for review, in the **Workflow Response** drop-down field, select **Forward**.

IMPORTANT: If you Release instead of Forward the document, by mistake, the document enters the approval workflow. In order to recover and forward as intended, ask the next approver (most likely the Director) to reject the approval to make the Forward option available to you.

3. In the **User** field, click the magnifying glass icon.
4. In the **Type** field, select **Individual**.
5. Click the **Search** command button.
6. Click the username to whom the document should be forwarded.
7. Click the **Select** icon in the toolbar.
8. In the **Note** field, type any message to send to the person along with the forwarded document.

NOTE: You will be able to review your notes as well as those of the person who returned the document to you in the Notes view. See [Reviewing Document Notes](#) later in this guide.

9. Click the **Save** icon in the toolbar.

NOTE: Notice that the workflow response menu is no longer available. It will reactivate when the person to whom you forwarded the document returns it to you.

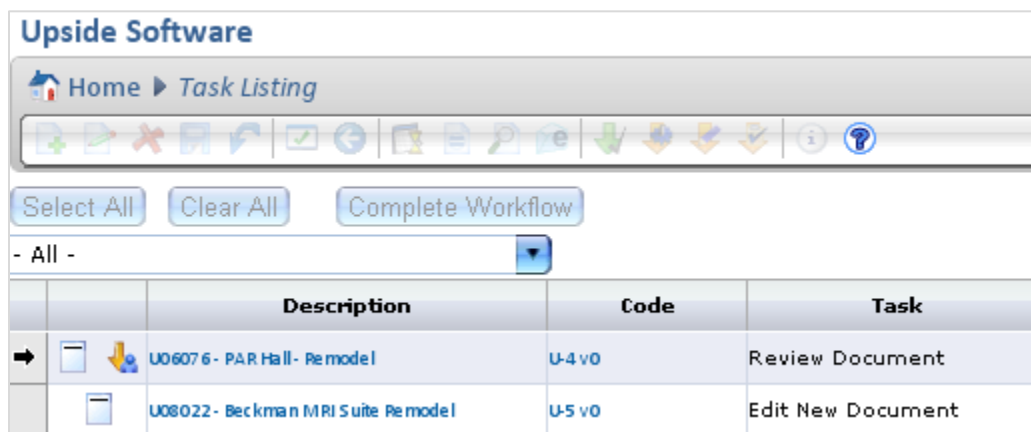
10. To view whether the individual still has the document, with the contract selected, expand the **Header** option in the Menu Pane and select the **Workflow** option.

From this view, you can see when the contract was forwarded, to whom it was forwarded and the assigned task.

The screenshot shows the 'Upside Software' interface. The breadcrumb navigation is 'Home > Contracts > Contract U-1:0 > Workflow'. The top right shows a user 'Sign out (Mary)' and a 'Configuration' link. The main header displays contract details: 'Contract No: U-1', 'Contract Status: Edit Mode', 'Supp No: 0', 'Contractor: HPS', 'Start Date: 10/30/2009', and 'Contractor Name: Hanson Professional Services, Inc.'. Below this, there are 'Saved Views' (ContractWorkflowDefault), 'Search', and 'Configure' buttons. Filter fields include 'Completed' (set to 'N'), 'Assigned Date', 'Task Type' (set to '- Select -'), and 'Business Process' (set to '- Select -'). A table at the bottom lists workflow tasks.

	Navig...	Assigned	Assigned To	Task Description	Business Process	Initiated
	11/4/2009		Rogan, Chris	Review Document	Add Contract	11/4/2009

Review a Forwarded Document



When a contract is forwarded to you for your review, you will receive an email alerting you to its availability, with a link to **Upside**. Note the Contract number from the email before you log in, in case you have a number of tasks to perform. That will help you determine which document requires review.

IMPORTANT: There are three ways to review a contract: as a PDF document, using Document Compare, and using Inline Redlining. This procedure includes PDF document review. For the other two types of review, see [Reviewing the Main Document](#), later in this guide.

Review a Document in Upside:

1. Logon to **Upside** with your credentials.
NOTE: If already logged into **Upside**, the contract's Header view appears. SKIP to step 4.
2. In the **My Tasks** area, select the **Tasks** link.
NOTE: The Project Number will appear in the Code column.
NOTE: A document that has been forwarded to you will be described in the Task column as **Review Document**, as illustrated above.
3. Select the task **Description** link.
NOTE: On the Header that opens, confirm that you're in the right place by noting the Read-Only fields, such as Contract Number, Project Description, Project Number, and Vendor Name.
4. Click the **Print Preview** icon in the toolbar.
5. Click the **Prepare Document** command button.
NOTE: If you are using a pop-up blocker, you may need to give the browser permission to open the document.
6. Click the **Open** command button.
7. Review the document.

NOTE: Use any of the Adobe Acrobat features as necessary. For example, choose to print the document, send the PDF document to someone in an email, or save a copy of the document.

8. When reviewing is complete, in the **Workflow Response** drop-down field, select **Return**.

The screenshot shows the 'Upside Software' interface for the 'Workflow Response' view. The breadcrumb trail is 'Home > Contracts > Contract U-4:0 > Workflow Response'. The contract details are: Contract No: U-4, Supp No: 0, Start Date: 11/4/2009, Contract Status: Edit Mode, Contractor: DAP, and Contractor Name: DeStefano and Partners, Ltd. There is a 'User:' field with a search icon and a large 'Note:' text area. At the bottom, there is a 'Date:' field with a calendar icon.

9. Type your comments in the **Note** area.

NOTE: You will be able to review your notes as well as those of the person who forwarded the document to you in the Notes view. See [Reviewing Document Notes](#) the next topic in this guide.

10. Click the **Save** icon in the toolbar.

The document is returned to the person who sent it to you.

11. To review all Notes for the document, in the Menu Pane, select the **Notes** option.

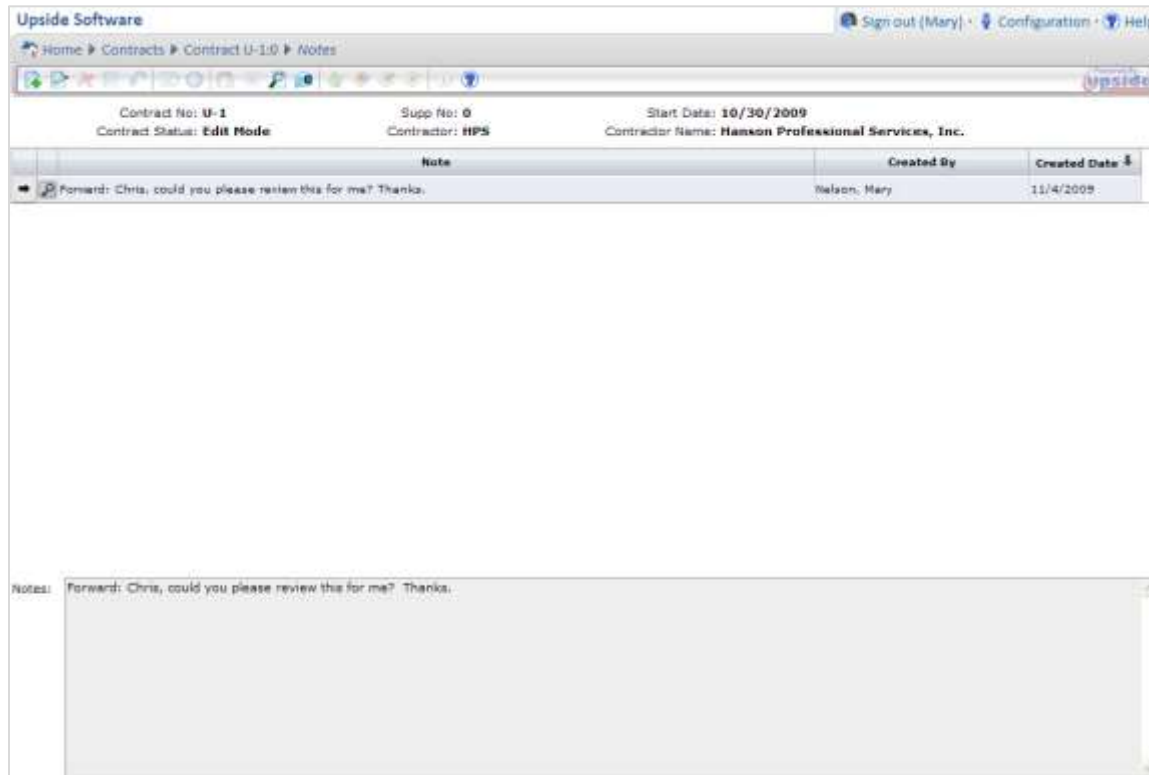
The history of notes about the forwarded contract appears, as illustrated below.

The screenshot shows the 'Upside Software' interface for the 'Notes' view. The breadcrumb trail is 'Home > Contracts > Contract U-4:0 > Notes'. The contract details are: Contract No: U-4, Contract Status: Edit Mode, Supp No: 0, Contractor: DAP, Start Date: 11/4/2009, and Contractor Name: DeStefano and Partners, Ltd. The table below lists the notes:

Note	Created By	Created Date
Return: Chris, Looks good to me, Mary	Nelson, Mary	11/4/2009
Forward: Mary, Please review this front end document and return to me with any comments. Thanks, Chris	Rogan, Chris	11/4/2009

NOTE: If preferred, navigate to the forwarded contract using the Project Code function in the Contracts view. Once the contract is located and selected, use the Print Preview icon in the toolbar to view the contract.

Document Notes



When documents have been forwarded to someone and Notes are available about a document's review, view them in ***Upside***.

View Notes about a Document:

Method 1

1. In the Menu Pane, under **Contracts**, select the **Contracts** sub-menu item.
2. Select the contract whose notes you wish to read.
3. Click the **Note** icon.
NOTE: If a contract has a blank Note icon, it has no notes associated with it.

OR

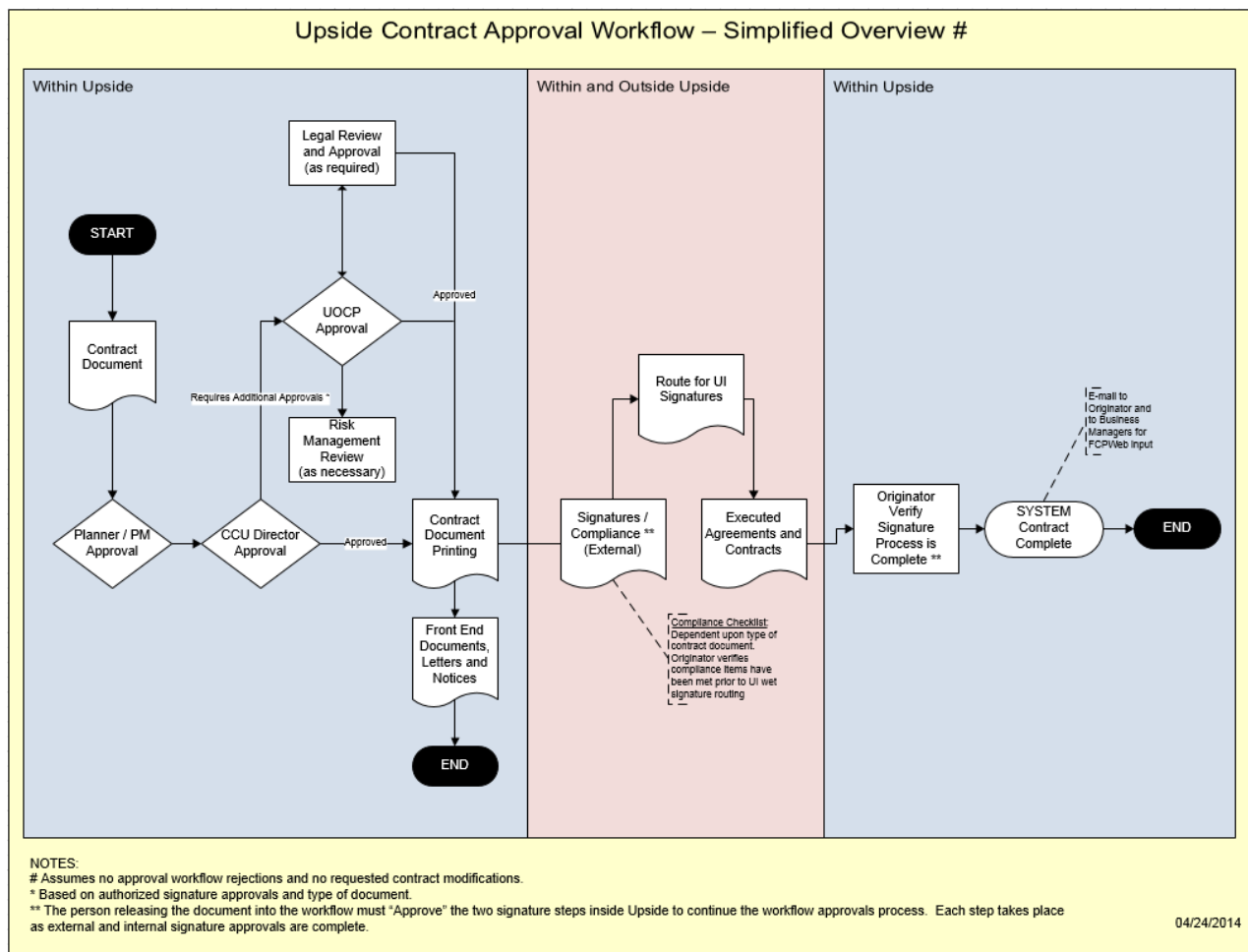
Method 2

1. In the Menu Pane, under **Contracts**, select the **Contracts** sub-menu item.
2. Select the contract whose notes you wish to read.
3. In the Menu Pane, expand the **Header** item.
4. Select the **Notes** menu item.
NOTE: If a contract has a blank Note icon, it has no notes associated with it.

-
5. Click the Note to view.
 6. If the Note is long, or to get a better view of it, click the **View** icon.

NOTE: From the new window, if desired, select all and copy the Notes into another program.

Release Documents into the Workflow



NOTE: A larger version of the above diagram appears in [Appendix E](#).

Once a contract document has been completed and is ready for internal approvals, release it into the workflow. Workflow approvals without modification (in the contracts) proceed in a straightforward fashion. The table below notes which levels of approval are necessary by contract document.

Workflow Approvals by Document

Document	Condition	1: Planner/PM	2: CCU Director	3: UOCP*	4: Legal*
Professional Services Agreement	No Language Changes	X	X	X	X
	Language Changes	X	X	X	X
PSA Award Letter	N/A	X	X		
Front End Documents	No Language Changes	X	X	X	
	Language Changes	X	X	X	X

Construction Contract	No Language Changes	x	x	x	x
	Language Changes	x	x	x	x
Construction Letters	N/A	x	x		

***NOTE:** Based on authorized signature approvals.

Release a Contract Document into the Workflow:

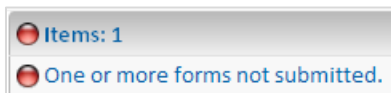
1. In the Menu Pane, select the **Contracts** menu item.
2. Select the row of the contract to view.
3. Click the **Print Preview** icon in the toolbar.
4. Click the **Prepare Document** command button.
NOTE: If you are using a pop-up blocker, you may need to give the browser permission to open the document.
5. Click the **Open** command button.
6. Review the document.
7. Close the Adobe Acrobat PDF document.
8. When the contract is ready to release into the workflow, in the **Workflow Response** drop-down field, select **Release**.

OR

If the document is NOT ready for the approvals workflow, forward it to someone else. See [Forwarding a Contract Document](#), earlier in this guide.

NOTE: A document may no longer be edited once it is released into the workflow.

NOTE: If you try to release a document into the workflow and receive the following error,



submit the Project form, then click the **Finish** button on the Contract Request.

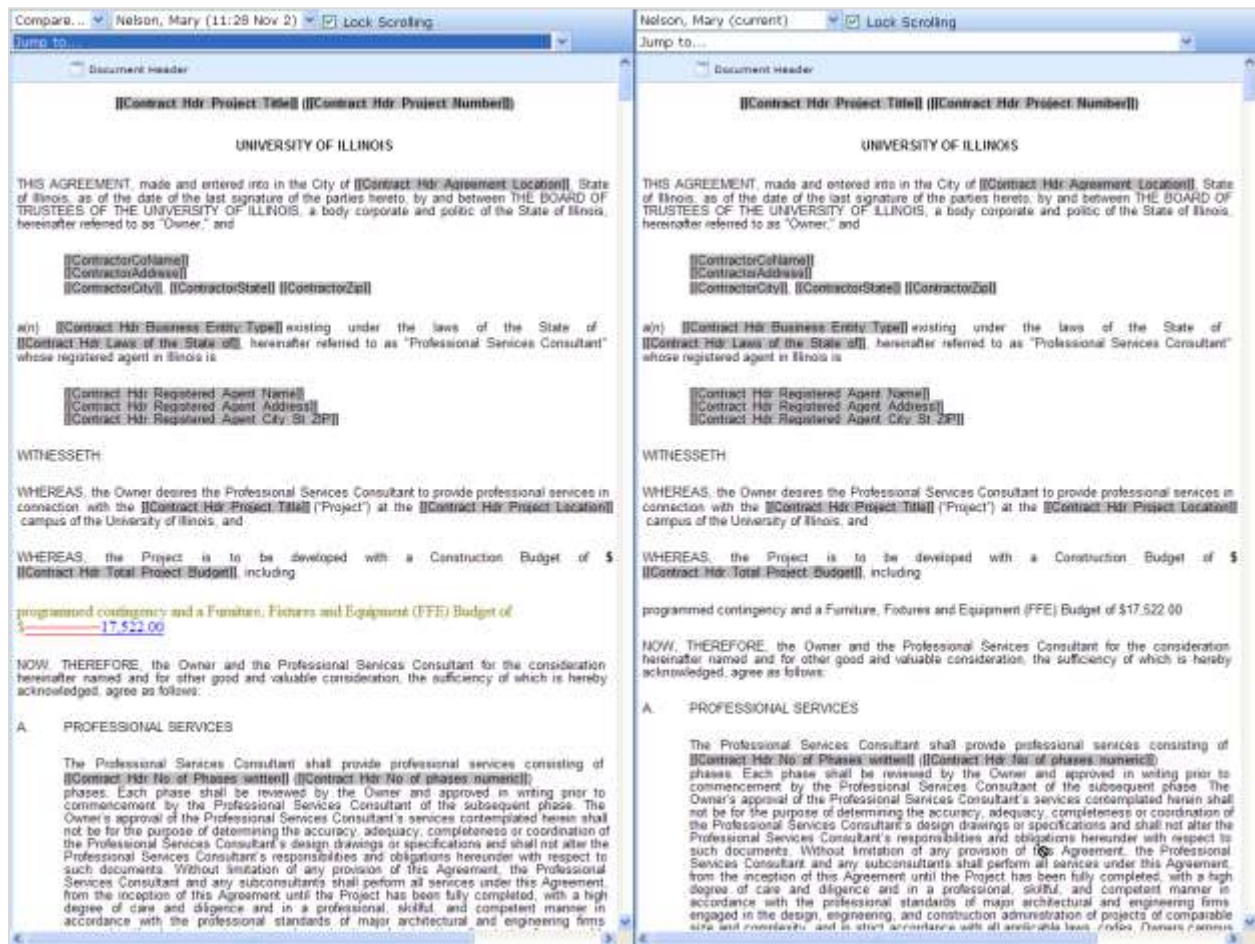
Review Workflow Approval Status

The status of a document in the workflow may be reviewed at any time. The Status and State columns in the tables below help to identify which workflow step the selected contract is in.

Status	Description
Edit Mode	Contract is in the process of being created. The user has full access to change document structure, details and items (as long as the user has the contract checked out).
Pending Director Approval	Awaiting review and approval by the unit Director.
Pending UOCP Approval	Awaiting review and approval by UOCP&RES.
Pending Legal Approval	Awaiting review and approval by Legal.
Pending Contractor Wet Signature / Compliance	The hard copy contract is being routed for external wet signatures. It must be reviewed for compliance items before the originator can Approve the document within Upside .
Pending UI Wet Signature	The hard copy contract is being routed for internal wet signatures. When all signatures have been completed, the contract must be scanned and uploaded to the Upside electronic contract before the originator can Approve it in Upside .
Executed	Contract has successfully gone through and completed the approval workflow. Edits can no longer be made to the contract.

State	Description
Active	Available for editing and managing contracts.
Forwarded	Contract has been forwarded to another user for review. Note that this does not indicate that the contract has entered the Approval workflow.

Review the Main Document



Each time a contract document is saved, a new document version is created. When a new Professional Services Agreement is created and subsequently edited, the basic or supplemental services that are added or deleted, the fields that require editing, and so forth can be compared with the original document. If you are the document editor, you can track how you've modified the document from the original. If you are an approver, you can view changes that have been made in order to perform your approval task.

There are three methods for reviewing the Contract Document:

- **Document compare** -- Using this feature, documents to be compared are displayed side by side, as illustrated above. Different versions of the same document can be compared, as with inline redlining. There is no option to jump to the next change, but the user can navigate by clause heading.
- **Inline redlining** – Splits the document-editing window horizontally. Two versions of the document can be compared with the current version. Changes are highlighted with redlining. The user can skip to the next changed area by hitting a button. The current version may also be edited.

-
- **View Versions** – All clause versions are tracked. First, select a clause, and then view the different versions of the clause, when the change was made, and who made the change. Two clause versions can be selected and compared. The changes will show up with redlining. The clause text can be replaced by selecting a version and clicking the Set Approval Candidate button.

No matter which type of document comparison is used, the user may wish to know how to gain more screen to view the comparisons. Many of the navigational panes in the view can be closed and restored later. See [Tips and Tricks for Navigating the Main Document](#), earlier in this guide.

Compare Documents

The Compare Documents feature allows the comparison of two different versions of a document and redlines the changes that have been made. Added text is colored green and underlined, deleted text is colored red and has a strikethrough along the text.

Compare Documents improves the editing process by identifying the changes that are made. If a document is forwarded to another user in the application or sent to an external third party, the entities are able to make changes to the existing document and return it to the originator. The originator can use the Compare Documents feature to track the changes between the versions they submitted and what was edited and returned to them.

Compare Documents identifies the changes made between two different versions of a document. A document version is an instance of the document in a certain point of its life cycle. A document version is created when the document is forwarded to another user. The Compare Documents feature allows users to perform a 'side by side' comparison to track and identify the changes made when the document was reviewed.

Compare Versions of a Document:

While using the Compare Documents feature, users can only view the differences between two documents or document versions. Editing is not allowed.

1. From the **Contracts** menu, navigate to the **Documents** view.
 - a. From the Menu Pane, select **Contracts**.
 - b. Select the document that requires comparison.
 - c. In the Menu Pane, expand the **Header** option.
 - d. Select the **Documents** view.
 - e. Select the **Main Document** option.

2. Click the **Compare Documents** icon in the editing toolbar. 

NOTE: While the Compare window is open, the Main Document cannot be edited.

NOTE: The current version appears in the right pane by default.

3. In the left pane, in the **Version** drop-down field, select the version to compare with the current version.

4. Compare the current document to different document versions.

NOTE: The changes identified are the text added, deleted or modified 'compared to' the version selected from the right field.

5. Select the version to 'compare from' in the right side **Version** field.

NOTE: The changes identified are the text added, deleted or modified 'compared from' the version selected from the left field.

6. Adjust the document comparison by selecting different versions from the **Version** fields.

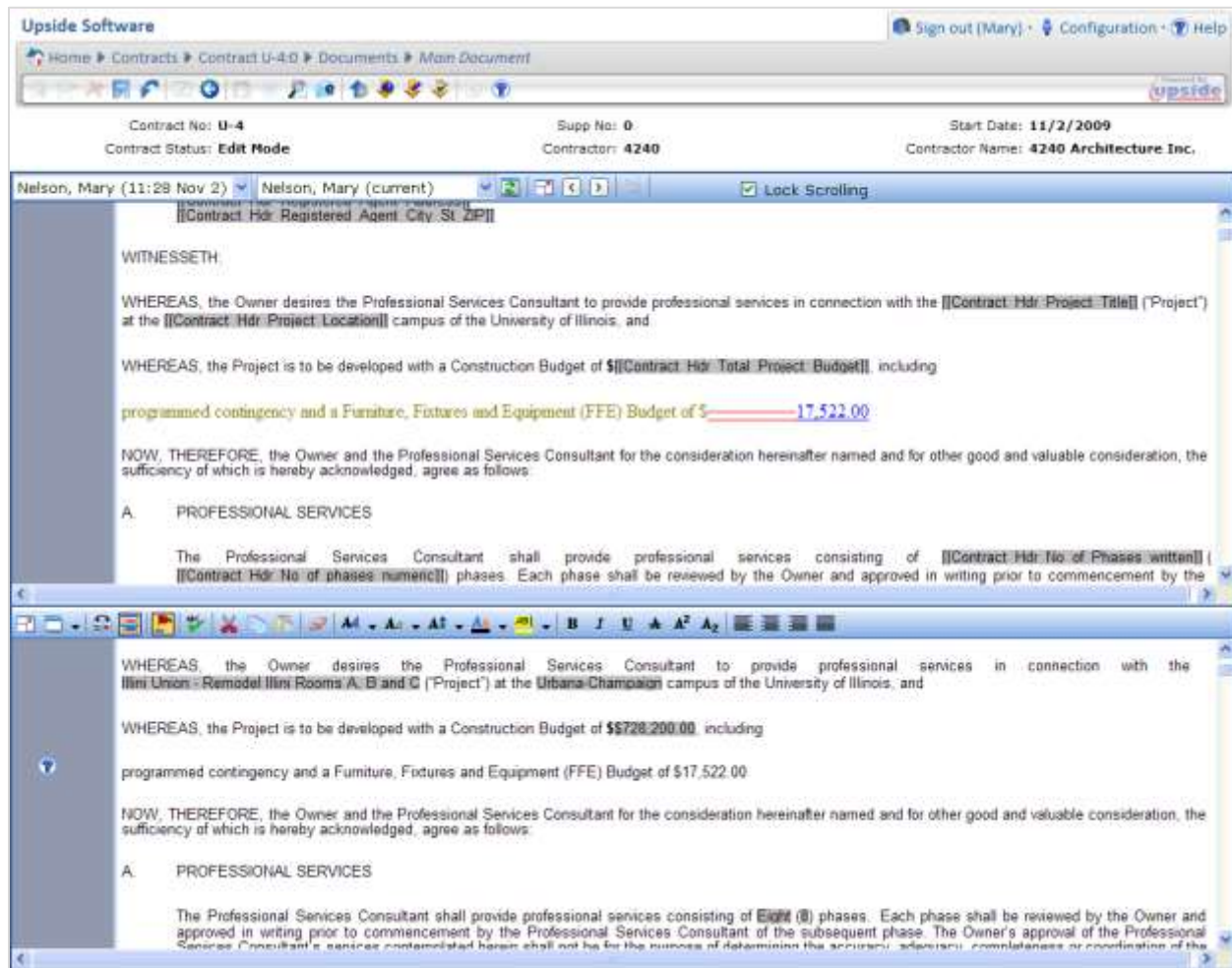
7. To unlock scrolling, uncheck the **Lock Scrolling** checkbox, which is selected by default.

8. To navigate the document, either scroll through it using the scroll bar or use the **Jump to** drop-down field to move through the document by clauses.



9. When done viewing the changes made to the document, close the Compare window by clicking the document **Close** icon.

In-line Redlining




The Inline Redlining feature allows the comparison of two different versions of a document to the current version and to identify the differences.

When using the Inline Redlining feature, the screen is split horizontally. The current version is displayed in the bottom half and is editable. The two versions being compared appear in the top half of the screen. This feature helps streamline the editing process by providing the option to view modifications made to previous versions while updating the current version.

Perform In-Line Redlining:

1. From the **Contracts** menu, navigate to the **Documents** view.
 - a. From the Menu Pane, select **Contracts**.
 - b. Select the document that requires Inline Redlining.
 - c. In the Menu Pane, expand the **Header** option.
 - d. Select the **Documents** view.

-
- e. Select the **Main Document** option.
 2. Click the **View Inline Redlining** icon in the editing toolbar. 

NOTE: Enlarge one pane by dragging the horizontal border between the displayed documents. Rest the mouse pointer on the dividing line until it becomes a double-headed arrow and drag the line in the direction desired.
 3. In the **Version** drop-down field on the left side, select the document version to 'compare to'.

NOTE: The default is the version immediately preceding the current version of the document.

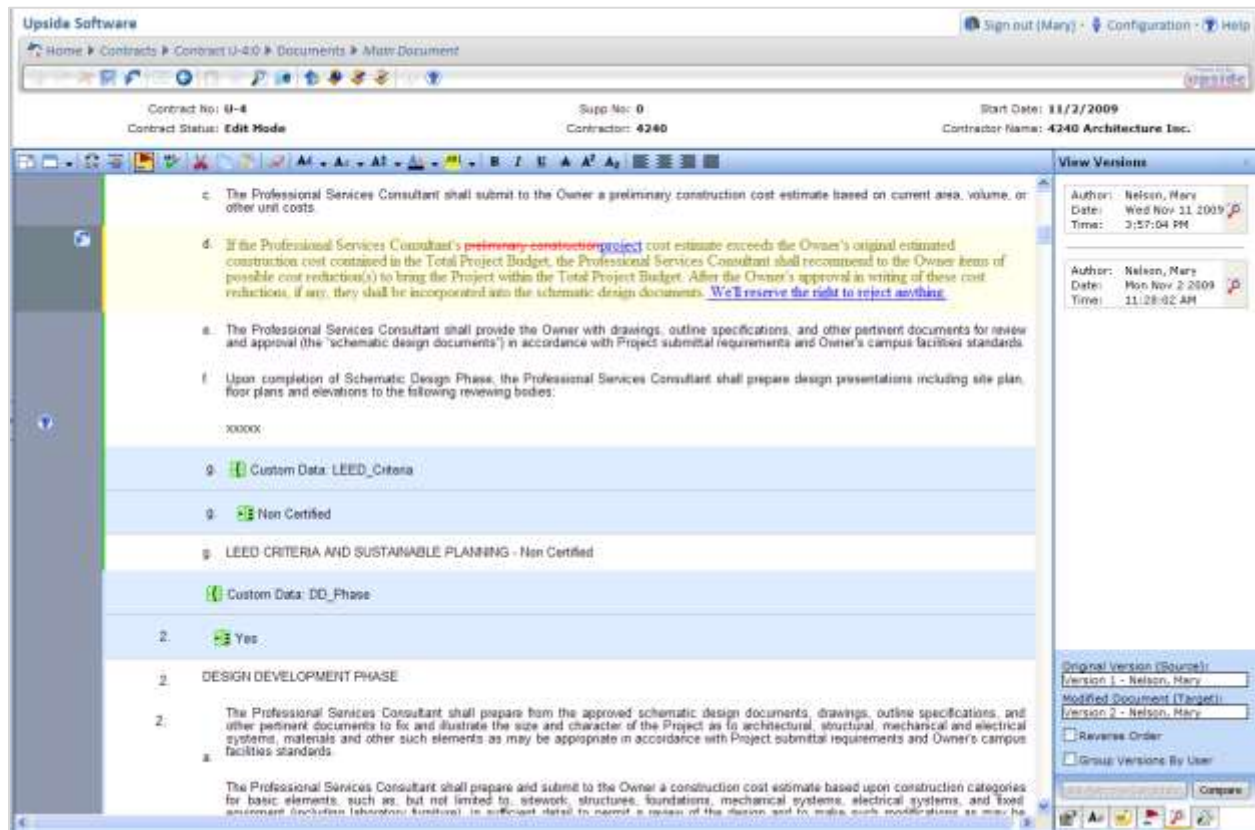
NOTE: The changes identified are the text added, deleted or modified 'compared to' the version selected from the right field.
 4. In the **Version** drop-down field on the right side, select the document version to 'compare from'.

NOTE: The default is the current version.

NOTE: The changes identified are the text added, deleted or modified 'compared from' the version selected from the left field.
 5. Adjust the document comparison by selecting different versions from the **Version** fields.

NOTE: When Inline Redlining is turned on, the current version displayed on the bottom half of the screen may be edited.
 6. To turn off the Inline Redlining feature and return the screen to normal, click the **View Inline Redlining** icon again.

View Versions



A version of an item is created every time changes are made to the textual content of an item and the item is saved. To view a clause that has been edited more than once, and to compare the modifications over time, the View Versions view can prove useful.

The View Versions panel is used to compare two different versions of a clause. When the versions are being compared, only content differences in text are compared. Changes to text such as Font Style or Font Color are not tracked. Changes compared are additions and/or deletions from the Original Version (Source) field and are compared to the version selected in the Modified Document (Target) field.

When comparing two different item versions, text that has been added to an item is colored blue and underlined. Text that has been deleted from an item is displayed in red strikethrough. Note that deleted clauses are NOT displayed in this comparison view.

Only two versions can be compared at once. When an item is being compared, the text in the item cannot be edited.

Compare Versions:

1. From the **Contracts** menu, navigate to the **Documents** view.
 - a. From the Menu Pane, select **Contracts**.
 - b. Select the document that requires comparison.
 - c. In the Menu Pane, expand the **Header** option.
 - d. Select the **Documents** view.
 - e. Select the **Main Document** option.

2. Click the **View Versions Panel** icon. 
3. Select the **View Versions** (magnifying glass) icon.

NOTE: When first navigating to the View Versions Panel, the version that has the enabled magnifying glass is the current selected version of the item.

4. Select an Original Version (Source) and a Modified Document (Target) by clicking magnifying glass that is located to the right of each version.

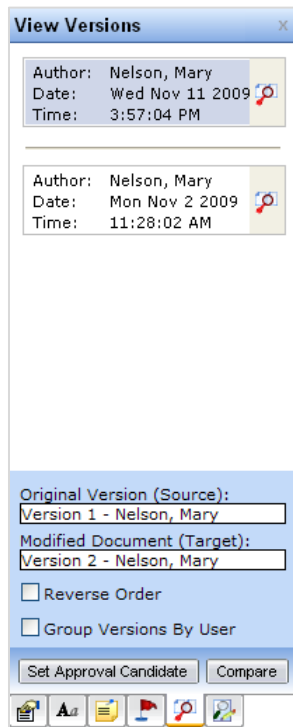
NOTE: The oldest selected version automatically loads into the Original Version (Source) field and the most recent selected version automatically loads into the Modified Document (Target) field.

5. Click the **Compare** command button.

NOTE: When an item is being compared, a **Cancel** icon appears in the margin beside it. Clicking the **Cancel** icon clears the comparison.

Select an Approval Candidate:

1. Once versions of a clause have been compared, the user may wish to accept one version.
2. In the **View Versions** pane, click the version to activate as the current version to de-select it.



NOTE: The selected version is highlighted, and the **Set Approval Candidate** command button is enabled.

NOTE: Place a check in the **Reverse Order** field to switch the display of version fields. The version that is currently in the Original Version (Source) field is switched with the version in the Modified Document (Target).

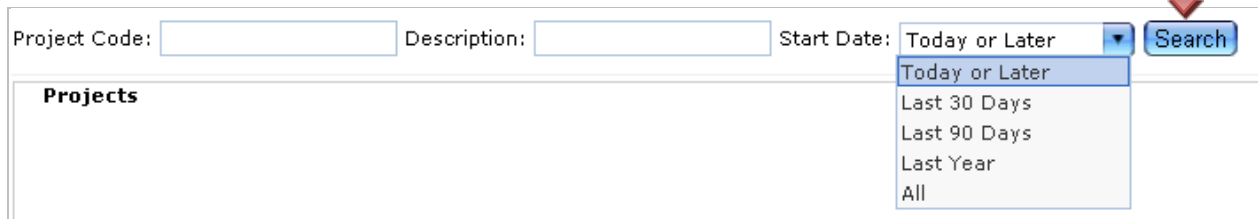
3. Click the **Set Approval Candidate** command button.
4. Click the **OK** command button in the confirmation dialog box.

OR

Click the **Cancel** command button to end the process.

NOTE: If the wrong version is accidentally accepted, click the **Cancel** icon in the toolbar. Click the **OK** command button in the warning dialog box. The document reverts to its previous state.

Use Search to Find Projects



Project Code: Description: Start Date: Today or Later ▼ Search

Projects

- Today or Later
- Last 30 Days
- Last 90 Days
- Last Year
- All

The Project Listing View can be used to Search for projects.

Use the Project Listing Search:

1. Using the Menu Pane, expand the **Contracts** menu.
2. Select the **Projects** menu item.
NOTE: The Projects listing screen may appear to be empty. The user must search for the project(s) to display.
3. (Optional) In the **Project Code** field, type in the Project number.
4. (Optional) In the **Description** field, type in the most unique identifying word(s) from the project title.
5. In the **Start Date** drop-down field, select an appropriate date range.
6. Click the **Search** command button.

NOTE: The search may need to be refined if it yields too many or too few results.

Use the Inquiry Feature

Upside Software

Home > Inquiry

Document Type: Internal Documents in ☐ Contracts ☐ Templates

Search Text: ☒ Exact

Narrow Scope

Document Created Date: Equals

Document Created By:

Document Status: ☒ All ☐ Approved ☐ Not Approved

Org Unit: - Select -

Language: English

Current Version: ☒

Document ID:

Supplement No:

Document Description:

Document Amount: Equals

Start Date: Equals

End Date: Equals

Document Party:

Contract Manager:

Contract Type: - Select -

Project CD:

The Inquiry feature allows searching for documents by text, contract manager, project code, vendor, and other aspects of the contract. The following table describes the criteria that may be searched:

Search Criterion	Description
Document Type*	<p>In order to begin a search, first select a Document Type. (A Document Type describes where the documents were created.) There are three different types that can be selected:</p> <ul style="list-style-type: none"> • Internal Documents – Any documents created within the application such as Templates or Contracts. • External Documents – Any document that has been uploaded into the application such as an attachment on a contract. (NOTE: Currently, our ability to search attachments is disabled but may be enabled in the future.) • Both – Allows searching for Internal and External Documents. <p>Once selected, choose which area, Contracts or Templates, contains the desired text.</p> <p>*NOTE: This field is required for any search.</p>

Search Text	Enter a word or phrase that the application should search for.
Exact	<p>Determines whether or not the application searches for grammatical variances of the Search Text. If the checkbox Exact is selected, the application does not search for grammatical variances of the entered word. If the checkbox is not selected, the application searches for grammatical variances.</p> <p>For example, search text 'testing' and the Exact checkbox is checked, the application only returns instances of the word testing. Search text 'testing' and the Exact checkbox is not checked, the application returns grammatical variances of the word testing (i.e., test, tests, tested, etc.).</p>
Document Created Date	Used to filter search results by the date that the document was created. If the exact date of the document is not known, the user may also select 'Equals', 'Between', 'Greater Than', or 'Less Than' to broaden the search results.
Document Created By	Used to search for and select the user who created the document.
Document Status	Used to select the status of the documents that filters the search results. Users can search for documents of the following statuses: 'All', 'Approved' or 'Not Approved'.
Include Child Org Unit	Select this checkbox to search through all Child Org Units that are associated with any contracts. The checkbox only appears when the Document Type 'Contracts' is selected.
Language	Used to filter search results by Language. The Language is defined on the Header tab.
Current Version	Checkbox indicates that the search results should only contain the most current version of text. This checkbox is automatically selected by default.
Document ID	Used to enter the Contract Number of the desired record.
Supplement No	NOTE: Supplements are not being used within <i>Upside</i> , so this field cannot be used to search.
Document Description	Used to enter the document description to help narrow the search results to the specific document.
Document Amount	Used to enter the amount of the document of the desired record. This helps narrow the search results to documents that contain the specified amount. Document Amount only appears when 'Contracts' are selected in the Document Type field.
Start Date	Used to search by the record's start date. Manually enter the Start Date or click the calendar icon to select a specific date.
End Date	Used to search by the record's end date.
Document Party	Used to search by the Business Entity that was selected as the Vendor of the record. To filter the search results by Vendor, enter the Contractor or External Party name.
Contract Manager	Used to filter the search results by Contract Manager. Contract Manager only appears when 'Contracts' is selected as the Document Type.
Contract Type	Used to select a specific Contract Type that may relate to the desired document.

Project CD	The Project Code that is associated with the record being searched for. It is the same as the Project Number.
------------	---

Search Using Inquiry:

NOTE: Use any combination of fields in the Inquiry form as criteria for searching. Only the Document Type field (step 3, below) is required.

1. In the Menu Pane, expand the **Contracts** group.
2. Select the **Inquiry** option.
3. In the **Document Type** drop-down field, select the type of document that contains the desired text:
 - Internal Document (**Upside** contract document).
 - External Document (attachments).
 - Both (e.g., both internal and external documents).
4. Choose the **Contract** checkbox.

NOTE: Do not choose Template, since specific contracts cannot be found using the boilerplate text.
5. In the **Search Text** field, enter the desired text to search for.
6. To exclude grammatical variances of the text, choose the **Exact** checkbox.
To include grammatical variances of the text, choose the **Exact** checkbox to remove the checkmark.
7. To search for specific text by date, manually enter the **Document Created Date** or click the calendar icon and select a date.
8. To search by Document Creator, in the **Document Created By** field, click the magnifying glass icon.

NOTE: The Type field and the Business Relationship field are not configurable.

- a. To search by **User Role**, select the desired role.

- b. To search by a specific user, type in the user's net ID in the **User Code** field.
- c. Click the **Search** command button.
- d. Select the Document Creator's record and an arrow will appear to the left.

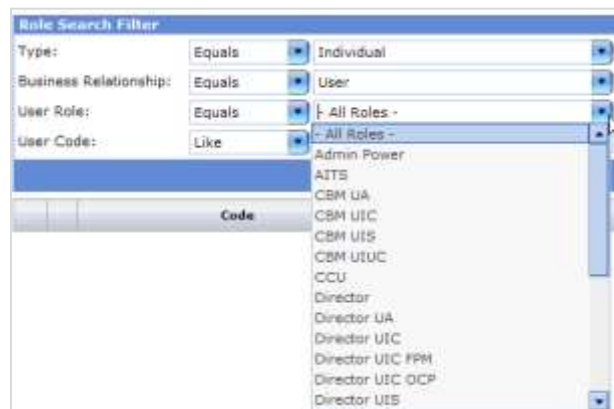
-
- e. Click the **Select** icon in the toolbar.
 - f. If the wrong individual was accidentally selected, click the **Delete** icon and search again.
9. In the Document Status field, select one radio button:
- All.
 - Approved.
 - Not Approved.
10. In the **Org Unit** drop-down field, select the org unit field.
- NOTE:** **Child Org Units** are currently NOT being used.
- NOTE:** English is the only **Language** option and is the default.
11. To search for the most current version of the text, choose the **Current Version** checkbox.
12. Enter the **Document ID**, if applicable.
- NOTE:** **Supplement No** are currently NOT being used.
13. Enter the **Document Description**, if applicable.
14. Enter the **Document Amount**, if applicable.
15. In the **Start Date** field, type the Start Date or click the calendar icon to select the Start Date from a calendar, if applicable.
16. In the **End Date** field, type the End Date or click the calendar icon to select the End Date from a calendar, if applicable.
17. In the **Document Party** field, enter the name of the vendor.
18. To search for the Contract Manager, type the name in the **Contract Manager** field.

OR

Select the magnifying glass icon to search for a Contract Manager.

NOTE: The Type field and the Business Relationship field are not configurable.

- a. To search by **User Role**, select the desired role.



- b. To search by a specific user, type in the user's net ID in the **User Code** field.
- c. Click the **Search** command button.
- d. Select the Contract Manager's record and an arrow will appear to the left.

- e. Click the **Select** icon in the toolbar.
- f. If the wrong individual was accidentally selected, click the **Delete** icon and search again.

19. In the **Contract Type** drop-down field, select the appropriate type.

20. In the **Project CD** field, type in the project number (i.e., project code).
21. Click the **Search** command button.
22. If the results are undesirable, click the **Back** icon to refine the search.
23. To scroll through multiple pages to find the contract, click the page numbers at the bottom of the screen or click the next page button.
24. To view a contract listed on the first screen, click the **View** (magnifying glass) icon.

NOTE: In the Main Document, click the magnifying glass icon to print preview a PDF form of the document at any time.

Using Folders

To gather a set of contracts together for quick access, create a folder in the Documents area of the Default Pane.

Create a Folder:

1. In the Default Panel below the Menu Pane, select the **Folders** tab.
2. Right-click on the **Documents** option and select **Insert Folder**.
3. Right-click on the new folder and select **Rename Folder**.
4. Type in the new name for the folder.

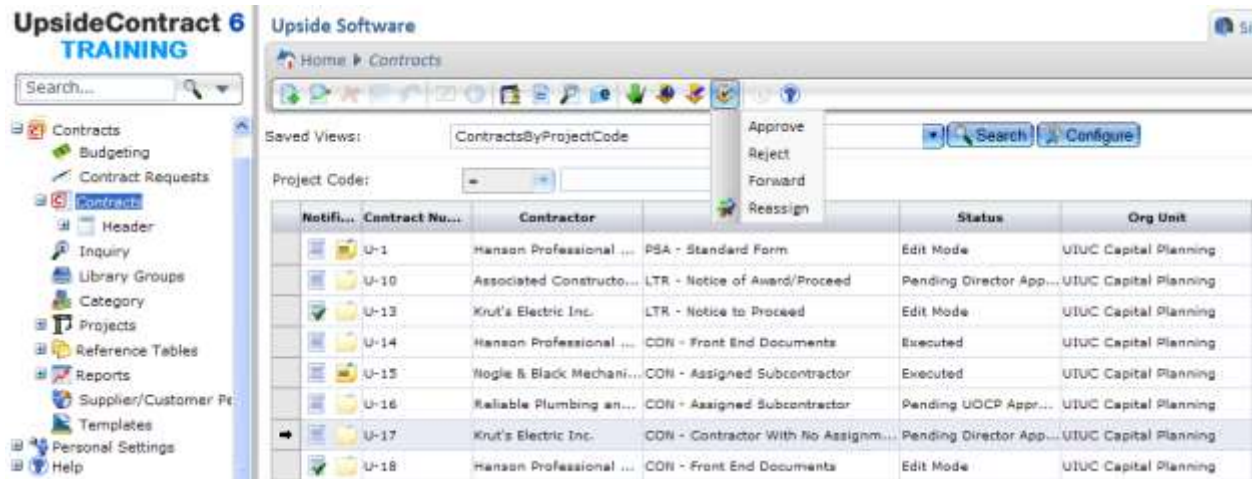
Add Documents to a Folder:

1. Navigate to an item to add to the folder.

-
2. In the **Folders** area of the Default Panel, right-click on the folder and select **Add Context**.
 3. Click on the folder name.
 4. Click on the item to view.
 5. In the Menu Pane, depending on the item, select one of the following: **Print Preview** or **Main Document**.

The selected document may now be worked with.

Approve Contract Documents



Before approving a document, the user will want to review it. Once the document has been reviewed, it is time to approve or reject it.

Review the Document Prior to Approval:

1. Logon to **Upside** with your credentials.
NOTE: If already logged into **Upside**, the contract's Header view appears. SKIP to step 5.
2. In the **My Tasks** area, select the **Tasks** link.
NOTE: A document that has been forwarded to you will be described in the Task column as **Review Document**, as illustrated above.
3. Select the task **Description** link.
NOTE: On the Header that opens, confirm that you're in the right place by noting the Read-Only fields, such as Contract Number, Project Description, Project Number, and Vendor Name.
NOTE: See [Reviewing the Main Document](#), earlier in this guide, to review the Main Document.
4. Click the **Print Preview** icon in the toolbar.
5. Click the **Prepare Document** command button.
NOTE: If you are using a pop-up blocker, you may need to give the browser permission to open the document.
6. Click the **Open** command button.
7. Review the document.

Approve or Reject a Contract Document:

1. In the **My Tasks** area, select the **Tasks** link.
2. Select the task **Description** link.

NOTE: Confirm that you're in the right place by reviewing the Read-Only fields, such as Contract Number, Project Description, Project Number, and Vendor Name.

3. In the **Workflow Response** drop-down field, select one of the following options:
 - **Forward.** Forwards the record to another user for review. You cannot approve or reject the document until the selected user returns it to you. For further information on this task, see [Forwarding a Contract Document](#).
 - **Approve.** Select this operation after reviewing the record. The record continues to the next approver in the approval workflow.
 - **Reject.** Select this option to reject the record. A note is required with further instructions and/or the reason for the rejection. The contract is returned to the contract originator.

View the Status of a Contract Document in the Workflow:

1. From the **Contract** listing view, find the desired contract.
2. Observe the **Status** column.
3. Click on the Status column heading once to sort ascending and twice to sort descending.

NOTE: An arrow appears next to the column heading to indicate the direction of the sort.

Status*	Description
1. Edit Mode	Contract is in the process of being created. The user has full access to change document structure, details and items (as long as the user has the contract checked out).
2. Pending Director Approval	Awaiting review and approval by the unit Director.
3. Pending UOCP Approval	Awaiting review and approval by UOCP&RES.
4. Pending Legal Approval	Awaiting review and approval by Legal.
5. Pending Contractor Wet Signature / Compliance	Awaiting review and approval by the contract originator. At this stage the contract has been sent to the vendor and will return with wet signatures. It must be reviewed for compliance items before the originator can Approve the document within Upside .
6. Pending UI Wet Signature	The contract is being routed for internal wet signatures. When all signatures have been completed, the contract must be scanned and uploaded before it can be marked Approved in Upside and moved to the next status.
7. Executed	Contract has successfully gone through and completed the approval workflow. Edits can no longer be made to the contract.

***NOTE:** Numbers before each status name simply indicate the sequence of approvals. They are **not** part of the displayed status in **Upside**.

Appendix A: Upside Roles and Permissions

Roles	Tasks						Approvals					
	Add Project	Edit Project	View Project	Create Contract Request	Edit Contract Request	View Contract Request	Edit Contract	View Contract	Campus Approval	OCP&RES Approval	Special Clause Insertion	Legal Approval
Contract Processor	X	X	X	X	X	X	X	X				
Unit Director			X			X		X	X			
UOCP&RES			X			X		X		X	X	
Legal			X			X		X				X
Campus Business Mgr			X			X		X				
Viewer			X			X		X				

Appendix B: Optional and Editable Fields in the Professional Services Agreement

The Main Document of any contract, Front End Document, or letter contains clause security. The three security levels for clauses are:

- **Required** – Clauses which are required and may not be edited or deleted.
- **Optional** – Clauses which may be modified or deleted.
- **Editable** – Clauses which may be edited.

For most contract documents, all clauses are required and therefore may not be edited or deleted. However, in the Professional Services Agreement, many clauses are optional and a few clauses are editable. The list below provides guidance on those clauses.

Optional

All **Basic and Supplemental Services** are optional clauses which may be modified or removed if inapplicable.

Editable

- **Introduction: Furniture, Fixtures and Equipment (FFE) Budget** \$_____.
- **A. 1. f. Design Presentation(s) to:** _____.
- **A. 5. x. 2. a. On-Site Inspections:** Number of visits per division of work.
- **F. Compensation** tables.
- **O. Personnel:** Names and Functions table.
- **Attachment B:** Hourly Rate Schedules.
- **Attachment C:** Time of Completion.
- **Attachment D:** PSC/Subconsultant Work Summary table.

Appendix C: Field Character Limits

Some fields in **Upside** have character limitations, particularly in the Front End Documents Contract Request. The table below indicates which document, form, request, and fields have those limitations and what those limits are. To count characters, use the procedure below.

Document/Form	Field Name	Character Limit
Project Header	Project Title (Abbreviated)	50
Project Header	Budget Amount	12
Project Bidding Form	Alternates	First 10 alternates = 1,000 All others = 255
Project Bidding Form	Unit Prices	First 10 unit prices = 500 All others = 255
Any Project	Short Project Description	1,750
Front End Documents	Detailed Project Description	1,750
	Detailed Description of Project Location(s)	750
	Location(s) for each Bid Opening	500
	Bid Document Procurement Clause	1,000
	PreBid Conference	500
	Reference Set Address Locations	3,000
	Project-Specific Prequalification Information	5000
	Site Examination Contact Name	255
	Contractor with Assigned Bid will be opened in	255
	Assigned Subcontractor(s) Bid(s) will be opened in	255
	Non Assigned Contractor(s) Bid(s) will be opened in	255
Any Contract Request	Text Change Justification	4,000
	Contract Modification Text	4,000
Contract Forwarding	Notes	2,000

To Count Characters Using Microsoft Word 2010:

1. Copy the text to count into a blank Microsoft Word document.
2. On the **Review** tab, click **Word Count**.
3. Note the number of characters (with spaces). This is the character count for that block when pasted into an **Upside** text box.
4. Click the **Close** command button.

Appendix D: Upside Email Notifications

During workflow, email notifications are occasionally sent automatically by **Upside**, depending on specific triggers. The following table outlines the conditions under which an email notification may be received.

In general, email notifications are sent when a contract has been:

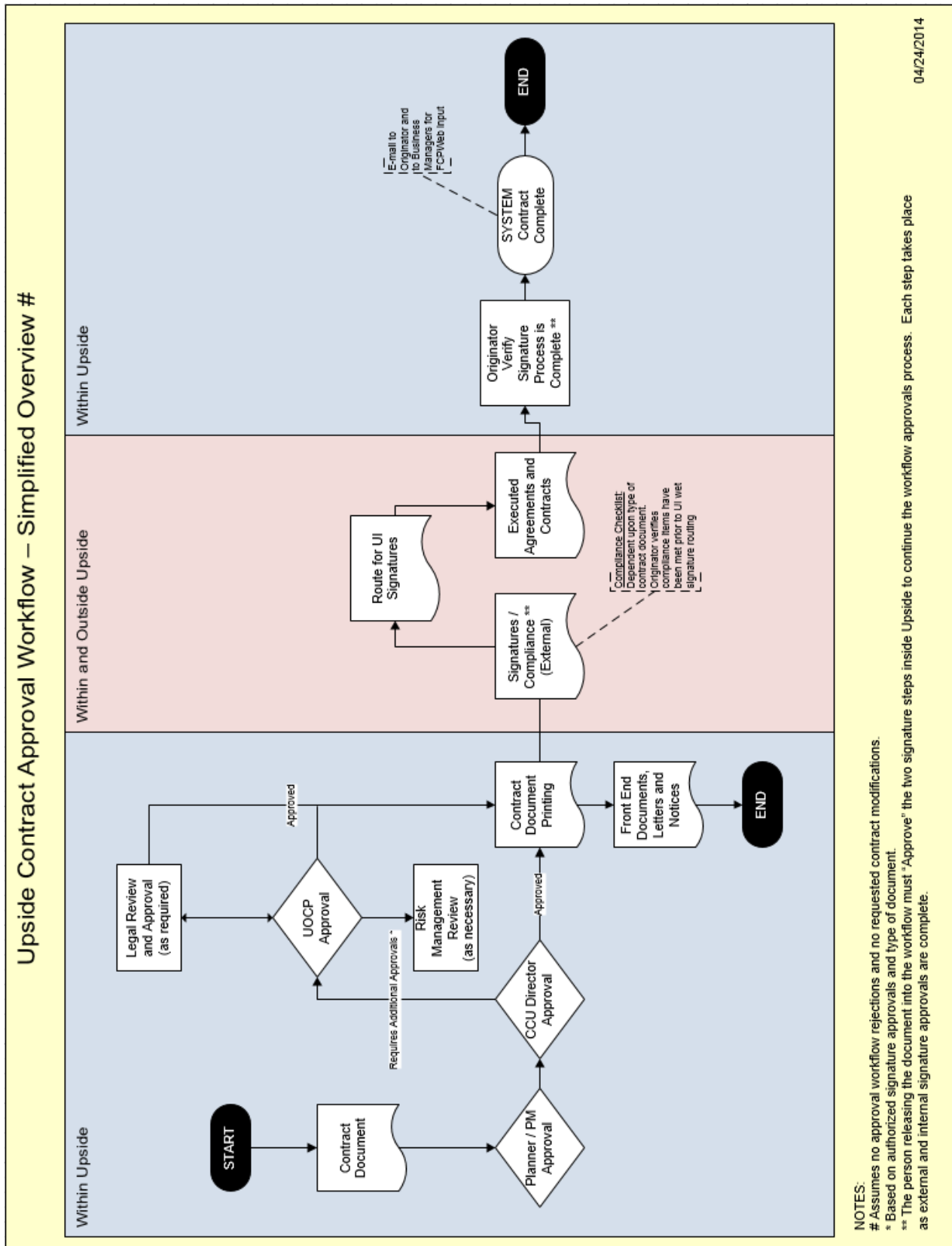
- Released into the workflow for your review.
- Approved or rejected.
- Forwarded for review and returned to you after review.

Approval Stage	Reason	Receiver	Email Subject Line*
Any stage	Contract Forwarded for Review	Anyone to which the contract is forwarded	Contract Review for Upside Contract # concerning...
After a contract is returned from being forwarded	Contract Returned from Forwarded Review	Everyone who has edit rights to the contract, meaning they are members of the contract org	Contract Returned From Forwarding for Upside Contract # concerning...
Campus Director Approval (no language changes / additions)	Contract Approved – Campus/UA Directors	Campus Director	Campus/UA Dir Approval for Upside Contract # concerning...
UOCP Approval (no language changes / additions)	Contract Requires UOCP Approval	Users with UOCP role	UOCP Approval for Upside Contract # concerning...
Legal Approval (no language changes / additions)	Contract Requires Legal Approval	Users with Legal Role	Legal Approval for Upside Contract # concerning...
Executed	Contract: Executed Status	User who submitted the contract, CBM for campus of the project org unit	Contract Executed for Upside Contract # concerning...
After Contractor wet signature	Contract Fully Executed with Wet Signatures	User who submitted contract	University Wet Signature for Upside Contract # concerning...
Any approval step by UOCP, Legal, Campus Directors	Contract Rejection	User who submitted the contract, users in any previous approval group (Campus Director, UOCP)	Contract Rejected for Upside Contract # concerning...

Approval Stage	Reason	Receiver	Email Subject Line*
First two approval steps for contracts with language changes / additions – Campus Director, UOCP	Contract has Language Change/Addition Requested	Campus Director, UOCP	Contract Change Approval for Upside Contract # concerning...
Last two approval steps for contracts with language changes / additions – Campus Director, Legal	Contract Review and Approval with Language Change/Addition Made	Legal, Campus Director	Contract Change Approval for Upside Contract # concerning...

*Document subject line will be specific to the project and contract, often including the project number, contract type and division of work (if relevant).

Appendix E: Approval Workflow Diagram



Appendix F: Upside Input Worksheet

The screenshot displays an Excel spreadsheet titled "UPSIDE Input Worksheet" with the "General Information" tab selected. The spreadsheet is organized into columns A, B, and C, and rows 1 through 26. The "General Information" section includes fields for "Project Number:" and "Project Title:", both of which are shaded blue. To the right of these fields, a note in italics states: "Fill-in information here and this will be auto-populated on all sheets." Below these fields, there is a section titled "General Information:" followed by a paragraph explaining the purpose of the worksheet: "This worksheet is to help the campus units in developing contracts within UPSIDE. PSCs will not have access to the software, therefore the information will need to be gathered in a different format." Further down, another paragraph states: "The format of the worksheet is meant to align with the format of the Project information within UPSIDE to help streamline data entry. Only items that require input from the PSC are included in this form." Below this, a note indicates: "The fields shaded in Blue are those that are required information." Another note states: "Notes to provide direction in filling out the form are provided to the right in italics." Finally, a paragraph at the bottom of the section reads: "Any revisions or suggestions for this form should be sent to UOCP&RES for review, incorporation and distribution to all campuses." The bottom of the spreadsheet shows several tabs: "General Information", "Professional Services", "Construction Manager", "Bidding", "Front End (Single)", and "Front End (Multiple)".

The PSC Agreement Worksheet is an Excel file that can be used by the Campus Construction Unit to obtain information needed to complete the Project Form and Contract Request Input page (for Front End Documents), since the Professional Services Consultant cannot access contract documents directly (as they did in CDS). The above illustration shows instructions for using the file and the tabs corresponding to the Project Form areas.

This file is available for download from the UOCP&RES website:

https://www.uocpres.uillinois.edu/UserFiles/Servers/Server_7758/file/UI/ProjDocs/forms/upside_input_worksheet.xls

Appendix G: Available Interactive Forms

OWNER/PROFESSIONAL SERVICES CONSULTANT AGREEMENT	
ATTACHMENT D	
PSC/SUBCONSULTANT MAFBE CERTIFICATION	
Project #/Name: _____	Federal Tax Identification #: _____
<input type="checkbox"/> PSC or <input type="checkbox"/> Subconsultant Name _____	
(Address, City, State, Zip, Telephone) _____	
1. The PSC/Subconsultant certifies that this business is a Minority Business Enterprise (MBE), Female Business Enterprise (FBE), or Person with Disabilities Business Enterprise (PBE) as defined in Section 2 of the Illinois Business Enterprise for Minorities, Females, and Persons with Disabilities Act, as amended (30 ILCS 575/0.01 et seq.) and:	
A. The Business Ownership as determined by CMS is:	
<input type="checkbox"/> MBE <input type="checkbox"/> FBE <input type="checkbox"/> FMB <input type="checkbox"/> PBE <input type="checkbox"/> VOSB <input type="checkbox"/> SDVOSB <input type="checkbox"/> Not Certified with CMS	
Certificate expiration date is: _____	
B. The Applicable Gender is: <input type="checkbox"/> Male <input type="checkbox"/> Female	
C. The Applicable Race/Ethnicity is:	
<input type="checkbox"/> Black/African American <input type="checkbox"/> Hispanic American <input type="checkbox"/> Asian American <input type="checkbox"/> Native American/Alaskan <input type="checkbox"/> White/Caucasian American	
2. In submitting this form, the PSC/Subconsultant verifies to the accuracy of the information and to the best of their knowledge the information is true and correct, and that the PSC/Subconsultant has agreed to perform the indicated contract/subcontract. The PSC/Subconsultant agrees to immediately notify the Board of Trustees University of Illinois, (address of the construction unit responsible for the respective project), of all changes to its status as a Minority, Female, or Person with Disabilities Business Enterprise within 15 days of the occurrence of such changes.	
SEE ADDITIONAL COPY(S) OF ATTACHMENT D, IF APPLICABLE	
MAFBE CERTIFICATION DEFINITIONS	
Definitions are controlled by 30 ILCS 575/0.01 and 49CFR Part 26 and are set forth herein for the convenience of the parties.	
A. Minority: The term "Minority", as used in the Agreement, refers to a citizen or lawful permanent resident of the United States who is:	
1. Black/African American: a person having origins in any of the black racial groups in Africa:	

Additional interactive electronic forms are available on the UOCP&RES website:

<http://www.uocpres.uillinois.edu/>

Page 2 of Attachment D is illustrated above. The **PSC/Subconsultant MAFBE Certification** form is one such form.

Additional Support

For support, please contact the AITS Service Desk.

UIC: 312-996-4806

UIS and UIUC: 217-333-3102

servicedeskait@uillinois.edu