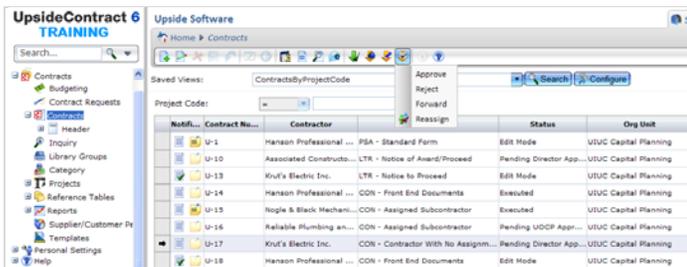


# Upside Approvers Job Aid

## Approving Contract Documents



Before you approve a document, you will want to review it. See [Reviewing the Main Document](#), later in this job aid. Once you have reviewed the document, you are ready to approve or reject it. You can perform this task from several places within Upside using the Workflow Response menu, as illustrated above.

### To Review the Document Prior to Approval:

1. Logon to Upside with your credentials.

The Summary Screen dashboard appears.

**NOTE:** If you were already logged into Upside, in the Menu Pane, click on **Home** to navigate to the Summary screen.

2. In your **My Tasks** area, click on the link to Tasks.



The Task Listing view appears, as illustrated below.



3. Click on the task **Description**.

**NOTE:** A document that has been forwarded to you will be described in the Task column as Review Document.

4. The document **Header** opens.

**NOTE:** You can 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.

5. To review the Main Document, see [Reviewing the Main Document](#), later in this job aid.

– OR –

To Print Preview the document:

- a. In the Toolbar, click on the **Print Preview** icon.   
The Print Preview dialog box opens.
- b. Click the **Prepare Document** button.   
The File Download dialog box opens.  
**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** button.  
The document opens in Adobe Acrobat.
- d. Review the document.
- e. Close Adobe Acrobat and return to the Header view.

### To Approve or Reject a Contract Document:

1. From the Summary Screen, click on **My Tasks**.  
A listing of tasks appears.
2. Click on the task **Description**.  
The Header is displayed.  
**NOTE:** You can 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 Toolbar, from the **Workflow Response** dropdown menu , 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.** After you have reviewed the record and would like to approve it, select this operation. The record continues to the next approver in the approval workflow.
  - **Reject** To reject the record, select this option. You will be required to enter a note for the user with further instructions and/or the reason for the rejection. The contract is returned to the contract originator.

### To View the Status of a Contract Document in the Workflow:

1. From the Contract Listing View, find the contract you're interested in.
2. Observe the **Status** column.

- If you are viewing a list of projects, you may click on the Status column heading once to sort ascending and twice to sort descending.

An arrow appears next to the column heading to indicate the direction of the sort. The following illustrates the column in descending sort order.

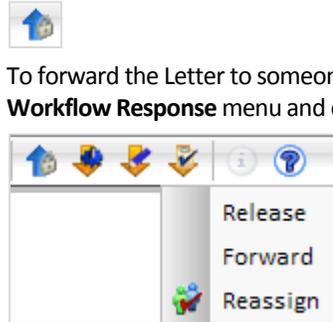
Contract Type	Status ↓
CON - Contractor With Assigned S...	Pending Director Approval
LTR - Notice of Award/Proceed	Pending Director Approval
CON - Assigned Subcontractor	Executed
PSA - Standard Form	Edit Mode

* 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.

## To Forward a Contract Document:

- Check in the document by clicking on the **Check In** icon.
- To forward the Letter to someone else, drop down the **Workflow Response** menu and click **Forward**.



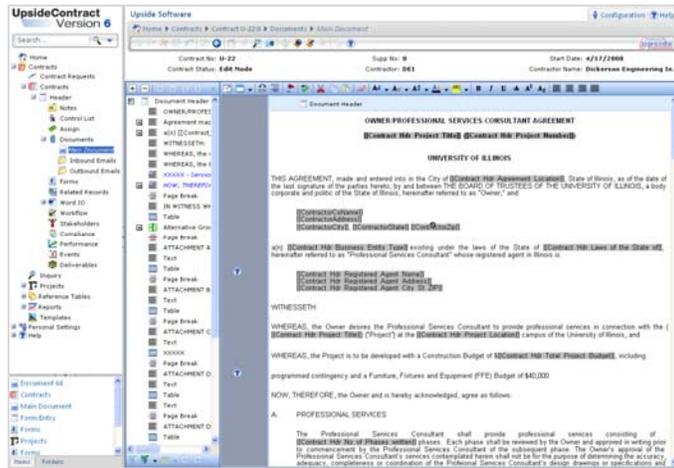
The workflow response document appears, as illustrated at the top of this page.

**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, you will have to ask the next approver to reject the approval for the option to Forward to return to you.

- From the **User** field, click on the magnifying glass icon. The User/Company Search dialog box appears.
- In the **Type** field, select Individual.
- Click the **Search** button. The list of system users appears.
- Click on the username to whom you wish to forward the document.
- In the **Notes** field, enter any message you wish 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* in the manual.
- In the **Toolbar**, click the **Save** icon.
- The list of contracts returns. Note that the **Workflow** response menu is no longer available to you. It will reactivate when the person to whom you forwarded the document returns it to you.
- To view whether the individual still has the document, with the contract selected, expand the **Header** option in the **Menu Pane** and click on the **Workflow** option.



## Reviewing the Main Document



The Main Document within Upside shows the boilerplate text as well as placeholders for variable information entered in the Project Form or in the Main Document itself. You can review a Contract Document as a PDF (see [To Review a Document as a PDF](#), earlier in this job aid). A PDF document does not highlight the variable text. The Main Document in Upside does highlight variable information, either with placeholders or with indicators in the document's Navigator Tree.

Each time someone saves a contract document, a new document version is created. For example, 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.

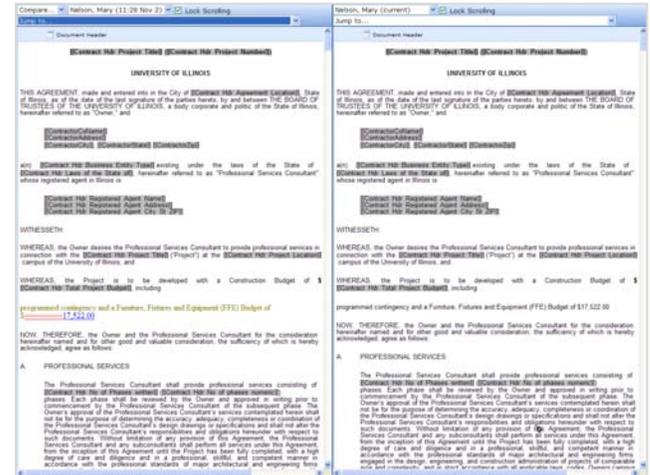
There are three methods for reviewing the Contract Document:

- Document compare** -- Using this feature, documents to be compared are displayed side by side, as illustrated above. You can compare different versions of the same document, as with inline redlining. There is no option to jump to the next change, but you can navigate by clause heading.
- Inline redlining** -- Splits the document editing window horizontally. You can compare two versions of the document with the current version. Changes are highlighted with redlining. This option allows you to skip to the next changed area by hitting a button. You may also edit the current version.
- View Versions** -- All clause versions are tracked. You can select a clause, and then view the different versions of the clause, when the change was made, and who made the change. You can select two clause versions and

compare them. The changes will show up with redlining. You can also replace the clause text by selecting a version and clicking the Set Approval Candidate button.

No matter which type of document comparison you're using, you may wish to know how to gain more screen to view the comparisons. You can close many of the navigational panes which are in the view and restore them later. See [Tips and Tricks for Navigating the Main Document](#), later in this job aid.

## Compare Documents



The Compare Documents feature allows you to compare two different versions of a document and redline 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.

## To 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.

- From the Contracts menu, navigate to the Documents view.
  - From the Menu Pane, select Contracts.

- b. Select the Document that requires Inline Redlining.
- c. In the Menu Pane, expand the Header .
- d. Click on the Documents view.
- e. Click  to view your document.

2. In the editing toolbar, click .

The Compare window opens. While the Compare window is open, you may not edit the Main Document.

By default the Current Version appears in the right pane.

3. In the left pane, drop down the **Versions** menu, and select the version you'd like to compare with the Current Version.

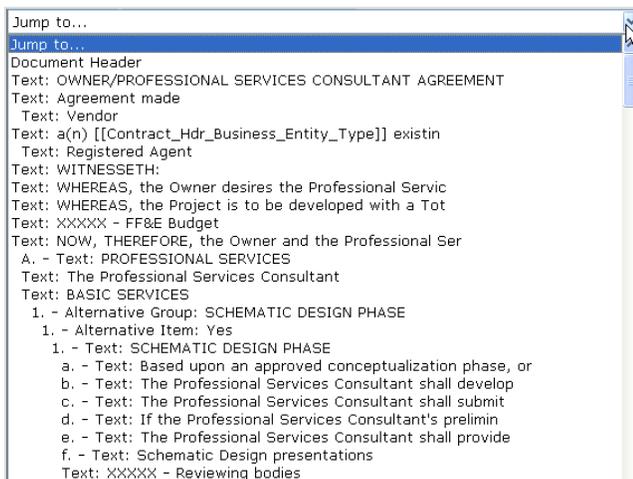
The selected version appears in the left pane.

4. Compare the current document to different document versions.

Comparing the current document to different document versions allows you to track the changes that have occurred over the lifecycle of the document.

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

5. Select the version you want to 'compare from' from the right side Version field. The changes identified during the document comparison are the text that has been added, deleted or modified 'compared from' the version selected from the left field.
6. You can adjust the document comparison by selecting different versions from the Version fields.
7. To scroll through the document, you may wish to **Lock Scrolling**, which is selected by default. To unlock scrolling, uncheck the checkbox.  Lock Scrolling
8. To navigate the document, you can either scroll through it using the scroll bar or use the **Jump to** dropdown menu, as illustrated below, to move through the document by clauses.



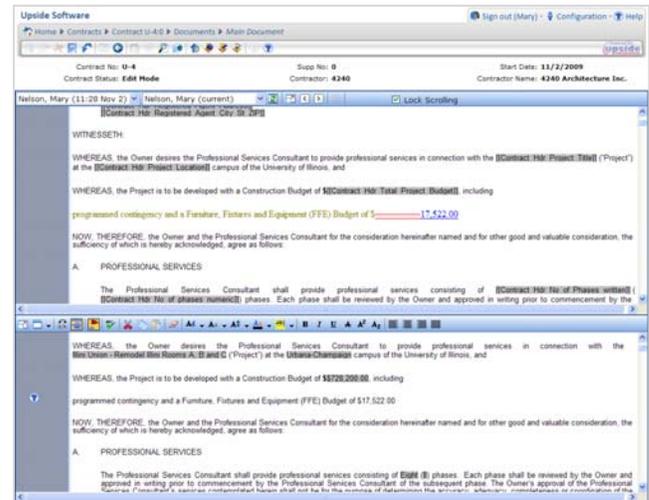
9. Once you have completed viewing the changes made to the document, close the Compare window by clicking on the document close button.

The Main Document reappears and is active.

## In-Line Redlining

The Inline Redlining feature allows you to compare two different versions of a document to the current version and identify the differences, as illustrated at the top of the next column.

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.



## To 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** .
  - d. Click on the **Documents** view.
  - e. Click  to view the document.

The document opens in the Main Document editing view.

2. In the editing toolbar, click the **View Inline Redlining** icon  to switch to the Inline Redlining view.

The screen is divided in two, and the document version fields are displayed. **NOTE:** You can enlarge one pane by dragging the horizontal border between the displayed documents. Rest your mouse pointer on the dividing line until it becomes a double-headed arrow and drag the line in the direction you wish.

3. From the **Version** field on the left side, drop down the menu and select the document version that you want to 'Compare To'.

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.

- From the **Version** field on the right side, drop down the menu and select the document version that you want to 'Compare From'.

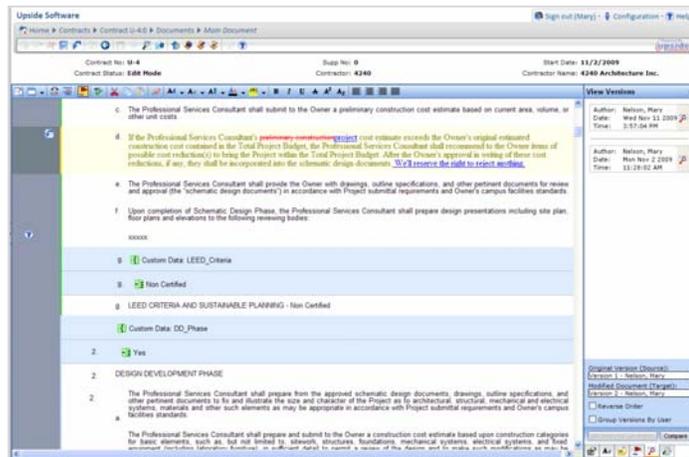
The default is the current version.

**NOTE:** The changes identified during the document comparison are the text added, deleted or modified 'Compared From' the version selected from the left field.

- You can adjust the document comparison by selecting different versions from the Version fields. Adjusting the document comparison provides a different perspective of the changes that were made between two different versions.
- When Inline Redlining is turned on, you may edit the current version displayed on the bottom half of the screen.
- 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. If you wish to view a clause that has been edited more than once, to compare the modifications over time, the View Versions view can prove useful.



You can use the View Versions panel 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 you are comparing two different item versions, as illustrated above, 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, you cannot edit the text in the item.

## Comparing Versions:

- Select the Documents screen from the Contracts menu.
  - From the Menu Pane, select **Contracts**.
  - Select the Document that requires Inline Redlining.
  - In the Menu Pane, expand the **Header** .
  - Click on the **Documents** view.
  - Click  to view the document.

The document opens in the Main Document editing view.

- Click the **View Versions Panel**  and select  **View Versions**.

**NOTE:** You can also access the View Versions Panel by right clicking a selected item, highlighting  Task Pane and selecting  View Versions.

**NOTE:** When you first navigate to the View Versions Panel, the version that has the enabled  is the current selected version of the item.

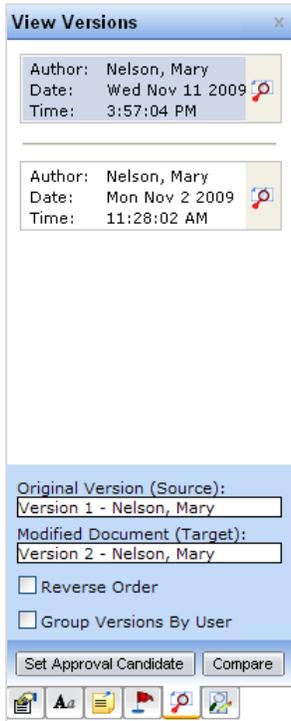
- Select an Original Version (Source) and a Modified Document (Target) by clicking  that is located to the right of each version. The oldest selected version automatically loads into the Original Version (Source) field and the most recent selected version automatically loads into the Modified Document (Target) field.
- Click the Compare button. 

The versions are compared in the selected item.

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

## Selecting an Approval Candidate:

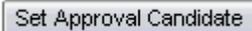
- Once you've compared versions of a clause, you may wish to accept one version.
- In the **View Versions** pane, click the version you wish to activate as the current version, to de-select it, as illustrated below.



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

You can 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** button.



A confirmation dialog box appears.



4. Click **OK**.

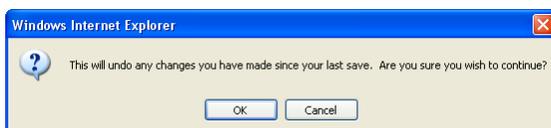
– OR –

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

**NOTE:** If you accidentally accept the wrong version, in the

Toolbar, click the **Cancel** icon. 

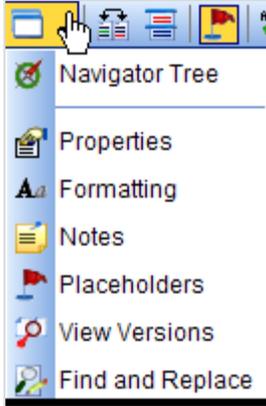
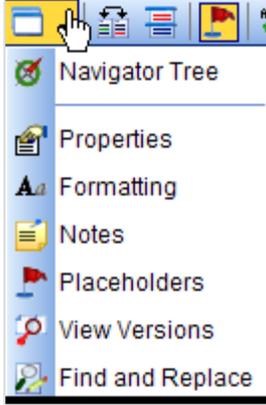
A warning dialog box appears.

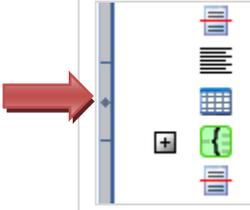


Click **OK**.

The document reverts to its previous state.

## Tips and Tricks for Navigating the Main Document

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

	the Upside Navigator minimizes.
<b>To Restore the Document Window:</b>	Click on the Maximize Editor icon again. 
<b>To Restore the Upside Navigator:</b>	Click on the small arrow in the thin line near the left edge of the window, as illustrated below.  The Navigator re-appears.
<b>To Find Text Requiring Editing:</b>	<b>Either:</b> Select the <b>XXXXX</b> prefix within the Navigator Tree. <b>– OR –</b> Scroll down the document and look for the  icon.
<b>To Edit:</b>	Select the clauses marked with <b>XXXXX</b> within the document. <b>NOTE:</b> Only Editors may perform this task. Type the desired text in the space provided.
<b>Go to the Top of the Main Document:</b>	Click on Document Header in the Navigator Tree.
<b>Go to the Bottom of the Main Document:</b>	Click on the last item in the Navigator Tree.