

Finding Upside Contracts

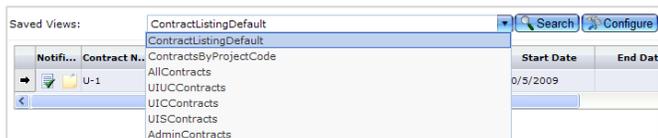
Using Filters to Find Contracts

Use the **Contract Listing View** to find the contracts you're looking for.

In the Menu Pane, expand **Contracts**. Click on the **Contracts** sub-menu item. The Contract Listing View appears.

Filtering the View

You can filter the **Contract Listing View** using the Saved Views dropdown menu, as illustrated below. The saved views are also listed below.



You can also filter the ContractsbyProjectCode view by entering a project number in the Project Code search field and clicking the Search button.

Project Code:

The search results will list all contracts related to that project number.

Navigating 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, as illustrated.



Selecting a Contract

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

Viewing Contract Summary Details

To quickly review a summary of a contract, you can click on the

Summary icon  in the Toolbar. A new window opens with more detail about the item you have selected, including any contract notes and workflow approvals the item has undergone.

Using Search to Find Projects

Project Code: Description: Start Date: 

Projects

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

1. Using the left Navigator, click on the plus sign (+) to expand the **Contracts** menu item.

2. Click on the **Projects** menu item.  (Also, see arrow on Navigator illustration above).

The screen refreshes to show the Projects listing screen.

NOTE: The Projects listing screen may appear to be empty. You must search for the project(s) you wish to have displayed.

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. From the **Start Date** drop down list, select one of the date ranges from the menu.

6. Click the **Search** button (see arrow in illustration above).

A list of projects that meet the criteria you selected appears.

NOTE: You may need to refine your search if you receive too many or too few results.

Using the Inquiry Feature

Upside Software

Home Inquiry

Document Type: Internal Documents in Contracts Templates

Search Text: Exact

Narrow Scope

Document Created Date:

Document Created By:

Document Status: All Approved Not Approved

Org Unit:

Language:

Current Version:

Document ID:

Supplement No:

Document Description:

Document Amount:

Start Date:

End Date:

Document Party:

Contract Manager:

Contract Type:

Project CD:

The Inquiry Feature

The Inquiry feature allows you to search for documents by text, contract manager, project code, vendor, and other aspects of the contract. Once you have entered search criteria and clicked **Search**, all records matching the criteria are displayed on the Inquiry Results Listing screen.

The following table describes the criteria by which you may search.

Search Criterion	Description
Document Type*	<p>In order to begin a search, you must 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 you to search for Internal and External Documents. <p>Once selected, you can choose which area, Contracts or Templates, contains the desired text. (NOTE: Currently our ability to search attachments is disabled but may be enabled in the future.)</p> <p>*NOTE: This field is required for any search.</p>
Search Text	The Search Text field is used to enter a word or phrase that the application should search for.
Exact	The Exact checkbox 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 of the word. For example, if you enter the word 'testing' as the search text and the Exact checkbox is checked, the application only returns instances of the word testing. If you enter the word 'testing' as the search text and the Exact checkbox is not checked, the application returns grammatical variances of the word testing (i.e. test, tests, tested, etc.).
Document Created Date	The 'Document Created Date' field is 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	The 'Document Created By' field is used to search for and select the User who created the document.
Document Status	The 'Document Status field' is used to select the status of the documents that filters the search

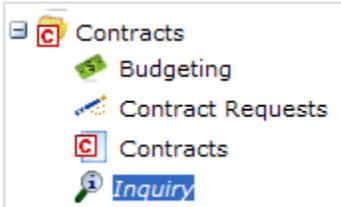
	results. Users can search for documents of the following statuses: 'All', 'Approved' or 'Not Approved'.
Include Child Org Unit	The user can select this checkbox to search through all Child Org Units that are associated with any contracts. The 'Include Child Org Unit' checkbox only appears when the Document Type 'Contracts' is selected.
Language	The Language drop down field is used to filter search results by Language. The Language is defined on the Header tab.
Current Version	The 'Current Version Only' checkbox indicates that the search results should only contain the most current version of text. This checkbox is automatically selected.
Document ID	The Document ID field is used to enter the number Contract Number of the desired record.
Supplement No	NOTE: We are not using Supplements within Upside, so this field cannot be used to search.
Document Description	The Document Description field is used to enter the document description to help narrow the search results to the specific document.
Document Amount	The Document Amount field is 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	The Start Date field is used to search by the record's Start Date, manually enter the Start Date or click  to select a specific date.
End Date	The End Date field is used to search by the record's End date.
Document Party	The Document Party field is 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 name of the Contractor or External Party.
Contract Manager	The Contract Manager field is used to filter the search results by Contract Manager. Contract Manager only appears when 'Contracts' is selected as the Document Type.
Contract Type	The Contract Type field is used to select a specific Contract Type that may relate to the desired document. Searching by Contract Type filters the search results by the selected Contract Type.
Project CD	The Project CD is the Project Code that is associated with the record that you are searching

for. It is the same as the Project Number.

To Search Using Inquiry:

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

1. From the Menu Pane, expand the **Contracts** menu item.
1. Click on **Inquiry**.



The Inquiry page appears.

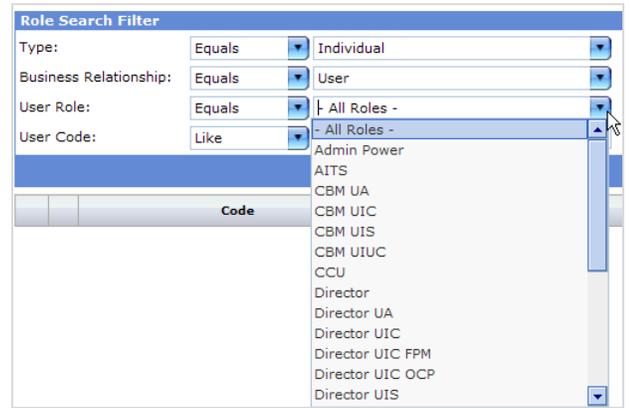
2. From the **Document Type** dropdown menu, select the type of document that contains the desired text:
 - Internal Document (Upside contract document)
 - External Document (attachments)
 - Both (e.g., both internal or external documents).
3. Select the **Contract** checkbox.

NOTE: Do not choose Template, since you will not be able to find specific contracts using the boilerplate text.
4. In the **Search Text** field, enter the desired text you're seeking.
5. To exclude from the search grammatical variances of the text, click in the **Exact** checkbox. To include grammatical variances of the text, click in the Exact checkbox to remove the checkmark.
6. To search for specific text by date:
 - a. Manually enter in the Document Created Date
– OR –
 - b. Click on the calendar icon and select a date.
7. To search by Document Creator, in the **Document Created By** field, click the magnifying glass icon.

The Role Search filter is displayed.

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

- a. To search by User Role, dropdown the menu, as illustrated below, and select the desired user role.



- b. If you wish to search by a specific user, in the **User Code** field, type in the user's net ID.
 - c. Click the **Search** button.

The search results appear.
 - d. Click on the Document Creator's record.

NOTE: An arrow should appear at left of the record once it is selected.
 - e. In the Toolbar, click on the **Select** icon.
 - f. The Inquiry form reappears, with the document creator's name filled in.
 - f. If you accidentally selected the wrong individual, click the Delete icon
 - g. The person's name is removed, and you can begin your search again.
8. In the Document Status field, select one radio button:
 - All
 - Approved
 - Not Approved
 9. From the **Org Unit** drop down menu, select the org unit field.
 10. Select the Child Org Unit checkbox if you want to include Child Org Units within the text search.

NOTE: We are currently not using Child Org Units.
 11. From the Language dropdown menu, select a **Language**.

NOTE: English is the only language option and is the default.
 12. If you would like to search for the most current version of the text, place a checkmark in the **Current Version** checkbox.
 13. Enter the **Document ID**, if applicable.
 14. Enter the **Supplement No**, if applicable.

NOTE: We are not currently using Supplements, so do not use this field as a search criterion.
 15. Enter the **Document Description**, if applicable.
 16. Enter the **Document Amount**, if applicable.
 17. In the Start Date field, type the **Start Date**.

– OR –

Click the calendar icon  to select the Start Date from a calendar, if applicable.

18. In the End Date field, type in the **End Date**.

– OR –

Click the calendar icon  to select the End Date from a calendar, if applicable.

19. In the **Document Party** field, enter the name of the vendor.

20. To search for the Contract Manager, in the **Contract Manager** field, type the name of the Contract Manager.

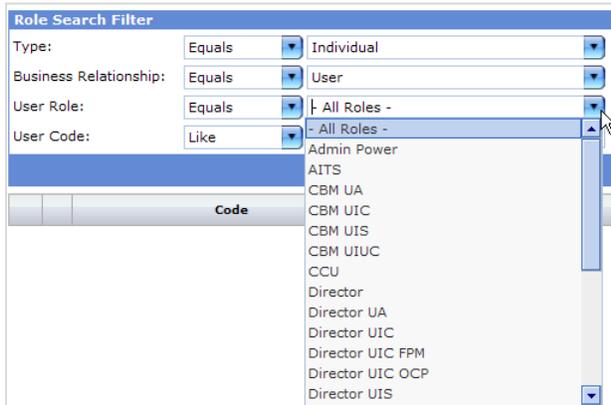
– OR –

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

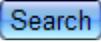
The User Role search page appears.

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

a. To search by User Role, dropdown the menu, as illustrated below, and select the desired user role.



b. If you wish to search by a specific user, in the **User Code** field, type in the user’s net ID.

c. Click the **Search** button. 

The search results appear.

d. Click on the Document Creator’s record.

NOTE: An arrow should appear at left of the record once it is selected.

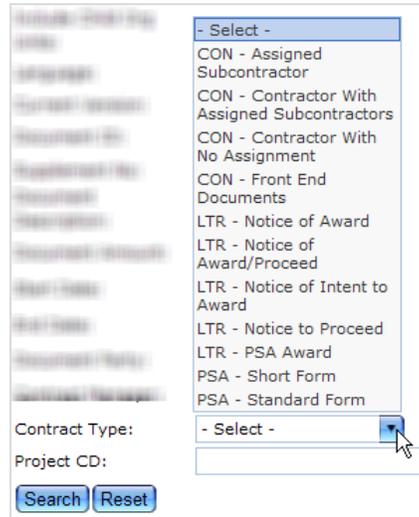
e. In the Toolbar, click on the **Select** icon. 

The Inquiry form reappears, with the Contract Manager’s name filled in.

f. If you accidentally selected the wrong individual, click the Delete icon 

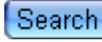
g. The person’s name is removed, and you can begin your search again.

21. From the Contract Type dropdown menu, select the **Contract Type**, as illustrated below.



22. In the **Project CD** field, type in the project number.

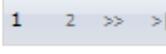
NOTE: Project CD stands for Project Code.

23. Click the **Search** button. 

The Inquiry Results screen appears, as illustrated below.

24. If the results disappoint you, click the **Back** button to refine your search. 

25. You may need to scroll through multiple pages to find the contract you’re seeking. Using section at the bottom of the Inquiry Results screen, click through using page numbers or

the next page button. 

26. If you wish to view a contract listed on the first screen, click on the View icon. 

The contract appears in the Main Document view.

NOTE: In the Main Document, you may click on the

magnifying glass icon  to Print Preview a PDF form of the document at any time.

27. You may now do the task you need to do with this contract document. Refer to the online manual to select your next task.