Upside Navigation Basics

Navigation

Elements of the Upside Interface

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

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

Menu Pane. The Menu Pane, the narrow pane on the left side of the interface, 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.

Default Panel. 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.

Summary Screen. 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.

- **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 links you to standard and ad hoc reporting capabilities.

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

Navigating the Interface

In addition to the Summary Screen, the Menu Pane, and the Default Panel, you can navigate Upside using the following Toolbar icons.

Upside Icons

Buttons used in your browser, such as the Back and Refresh icons, do not apply. 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. **CAUTION**: Always use the Back button in the Upside Toolbar; try never to use the Back button in the Browser window.
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

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

The Contract Listing View

To Navigate to the Contract Listing View
In the **Menu Pane**, expand the **Contracts** group. Click on **Contracts**. *NOTE:* Your mouse pointer should say "Contract Listing" when you hover over that option.

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.
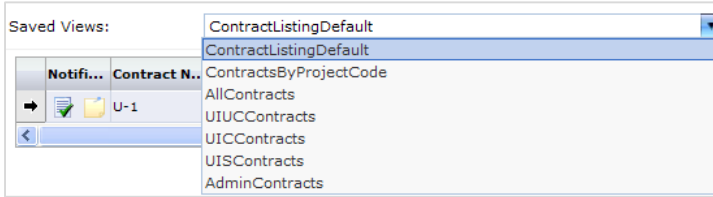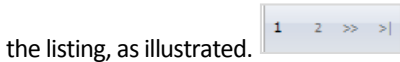

You can also filter the ContractsbyProjectCode view by entering a project number in the Project Code search field and clicking the Search button.
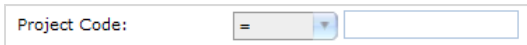
The search results will list all contracts related to that project number.

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. ➡

Checking 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. In the Toolbar, click on the **Check Out** icon.

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 the Breadcrumb Menu
You 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, you can go to the Summary Screen by clicking on Home.

Previewing a Document
To preview a document in PDF format, in the Toolbar, click on the Print Preview icon. A dialog box opens.

Click on the **Prepare Document** button.

The document opens as a PDF document in Adobe Acrobat. You may now work with it as you would most PDF documents.

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

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.