Upside Viewers Job Aid

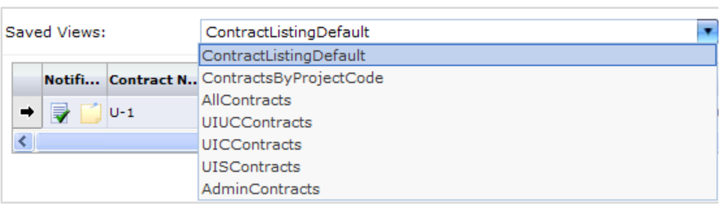
Using Filters to Find Contracts

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

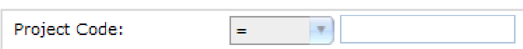
In the Menu Pane, expand **Contracts**. Click on the **Contracts** sub-menu item. The Contract Listing View appears.

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.

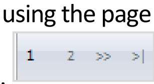


You can also filter the ContractsbyProjectCode view by entering a project number in the Project Code search field and clicking the Search button.



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.

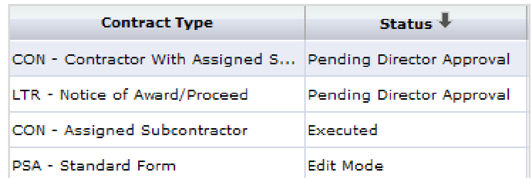
Viewing Contract Summary Details

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.

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.
3. 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.



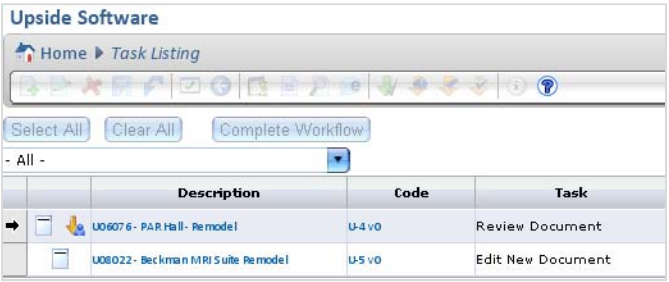
Contract Type	Status
CON - Contractor With Assigned S...	Pending Director Approval
LTR - Notice of Award/Proceed	Pending Director Approval
CON - Assigned Subcontractor	Executed
PSA - Standard Form	Edit Mode

See the following column for a listing of contract workflow statuses.

*	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 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. You may wish to note the Contract number from the email before you login, 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 types of review, see *Reviewing the Main Document*, later in this job aid or refer to the complete Upside manual.

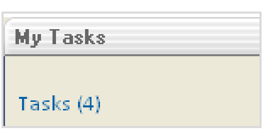
To Review a Document as a PDF:

4. Logon to Upside with your credentials.

   The Summary Screen dashboard appears.

   NOTE: If you were already logged into Upside, the contract's Header view appears. Skip to step 5 below.

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

   The Task Listing view appears, as illustrated below.

   NOTE: The Project Number will appear in the Code column. See illustration at the top of this topic.

6. Click on the task **Description**.

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

7. The document **Header** opens.

   NOTE: On the Header, you can 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.

8. In the Toolbar, click on the **Print Preview** icon. 

   The Print Preview dialog box opens.

9. 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.

10. Click the **Open** button.

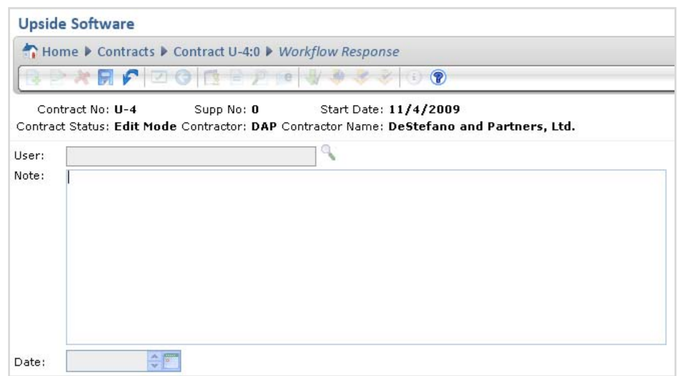
    The document opens in Adobe Acrobat.

11. Review the document.

    NOTE: From Adobe Acrobat, you may use any of the Acrobat features you wish. For example, you may choose to print the document, send the PDF document to someone in an email, or save a copy of the document.

12. When you are finished reviewing, dropdown the Workflow Response menu and select **Return**.

    The Workflow Response screen appears, as illustrated below.

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

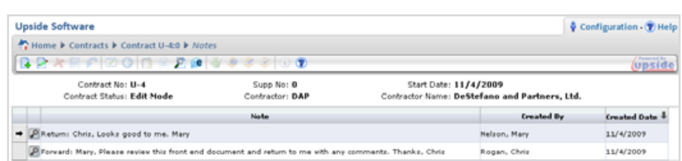
    NOTE: You will be able to review your notes as well as those of the person who forwarded the document to you in the Notes view.

14. Click the **Save** button. 

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

15. To review all Notes for the document, in the Menu Pane, click on the **Notes** option.

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

    The completed note from the reviewer will also appear below the history.

NOTE: If you prefer not to use the My Tasks function, you can navigate to the forwarded contract using the Project Code function in the Contracts view. Once you locate and select the contract, you can use the Print Preview icon in the Toolbar to view the contract.

Reviewing Document Notes

When documents have been forwarded to someone and Notes are available about a document's review, you may wish to view them in Upside. Documents which have been rejected may also have Notes.

To View Notes about a Document:

If there are notes associated with a contract, you may read them in one of two ways.

Method 1

1. In the Menu Pane, under the Contracts item, click on the **Contracts** sub-menu item.
2. A list of contracts appears.
3. Select the contract whose notes you wish to read.
4. Click on the Note icon.

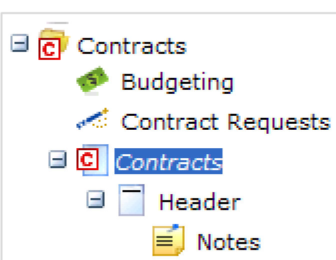
   The Notes view appears, as illustrated above.

   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 the Contracts item, click on the **Contracts** sub-menu item.
2. A list of contracts appears.
3. Select the contract whose notes you wish to read.
4. In the Menu Pane, click on the plus icon to expand the **Header** item.
5. Click on the **Notes** menu item, as illustrated below.



   The Notes view appears, as illustrated above.

   NOTE: If a contract has a blank Note icon, it has no notes associated with it.

6. Click on the Note you wish to view.

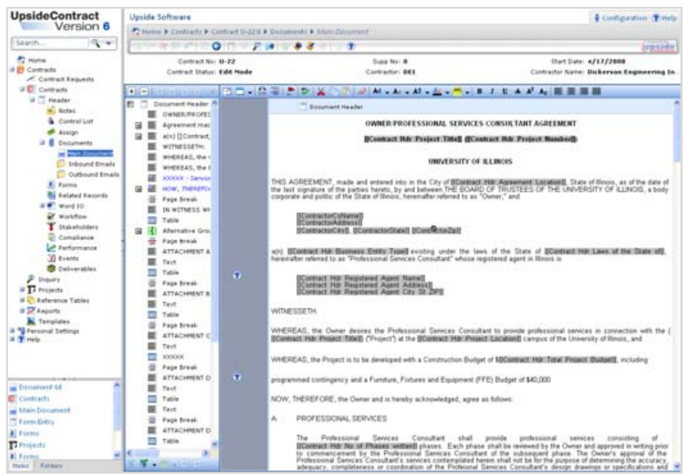
   An arrow appears to the left of the Note, and the Note appears in the Notes view, as illustrated below, at the bottom of the screen, as illustrated on the previous page.

7. If the Note is long, or if you wish to get a better view of it, click on the **View** icon.

   The Note appears in a new browser window.

   NOTE: From the new window, you may select all and copy the Notes into another program, if you would like or need to.

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.

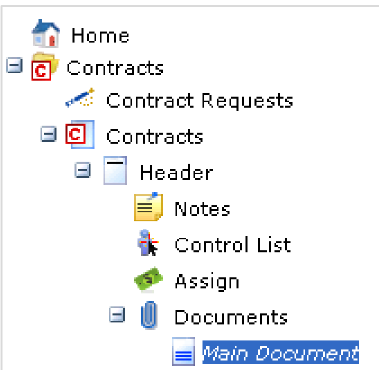
If you're viewing the Main Document, you may wish to know how to gain more screen to view the modifications made by the document's editor. You can close many of the navigational panes which are in the view and restore them later. See *Tips and Tricks for Navigating the Main Document*, later in this job aid.

To View the Main Document

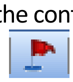
1. If it isn't already, in the Menu Pane, expand the **Contracts** menu item.
2. Click on the **Contracts** sub-menu item.

   A default contract listing screen appears.
3. In the **Saved Views** area at the top of the view, from the drop-down menu, select **All Projects**, or select the saved view for your campus, or search for the Project by number.

   The view refreshes to list projects for the view you selected.
4. Select the contract that you wish to edit.
5. To view the contract's Main Document:
   a. In the Navigator, expand the **Header** group.
   b. Under the Header group, expand the **Documents** group.
   c. Click on **Main Document** option, as illustrated below.

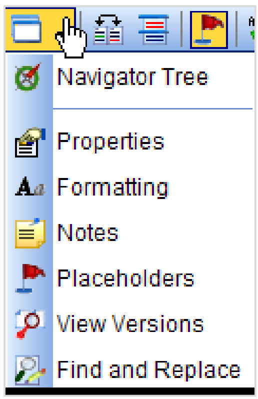
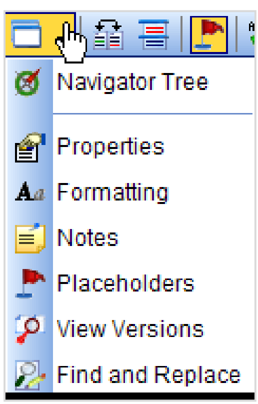
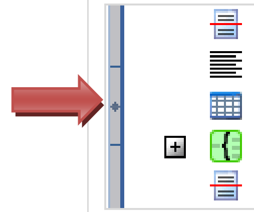


   The contract opens in the main window, with variable field names highlighted.

   NOTE: The highlighted text displays field placeholders by default. To toggle between the field placeholder text and the variable data (originally entered by the document's author) which was transferred into the contract, click on the **Show Placeholder Values** (flag) icon  in the contract toolbar.
6. Review the editable sections prefixed by the blue **XXXXX** text in the navigator.

   NOTE: You will need to expand all the items to ensure that you do not omit any editable areas. To expand all, click on the plus icon in the Toolbar, above the Navigator Tree . To collapse all, click on the minus icon. 
7. Scroll through the document and review changes that have been made.
8. To more easily navigate the document, see *Tips and Tricks for Navigating the Main Document*, later in this job aid.

Tips and Tricks for Navigating the Main Document

Navigation and Display	*Do this:*
Expand the Navigator Tree:	To expand all, click on the plus icon in the Toolbar, above the Navigator Tree .
Collapse the Navigator Tree:	To collapse all, click on the minus icon in the Toolbar, above the Navigator Tree.
To Open the Navigator Tree:	Drop down the menu, as illustrated below, and select **Navigator Tree**. 
To Close the Navigator Tree:	Click on the **Close** button.
To Open the Properties Pane:	Drop down the menu, as illustrated below, and select **Properties**. 
To Close the Properties Pane:	Click on the **Close** button.
To Maximize the Document Window:	Click on the Maximize Editor icon. This action closes the Navigator Tree. ***NOTE***: When you Maximize the Editor, the Upside Navigator minimizes.
To Restore the Document Window:	Click on the Maximize Editor icon again.
To Restore the Upside Navigator:	Click on the small arrow in the thin line near the left edge of the window, as illustrated below.  The Navigator re-appears.
To Find Edited Text:	**Either:** Select the XXXXX prefix within the Navigator Tree. **– OR –** Scroll down the document and look for the icon.
To Edit: ***NOTE:*** Only Editors may perform this task.	Select the clauses marked with XXXXX within the document. Type the desired text in the space provided.
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.