

SIU Contracts

# Approval Team User Guide

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Last Updated: November 8, 2020

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# Concepts and Definitions

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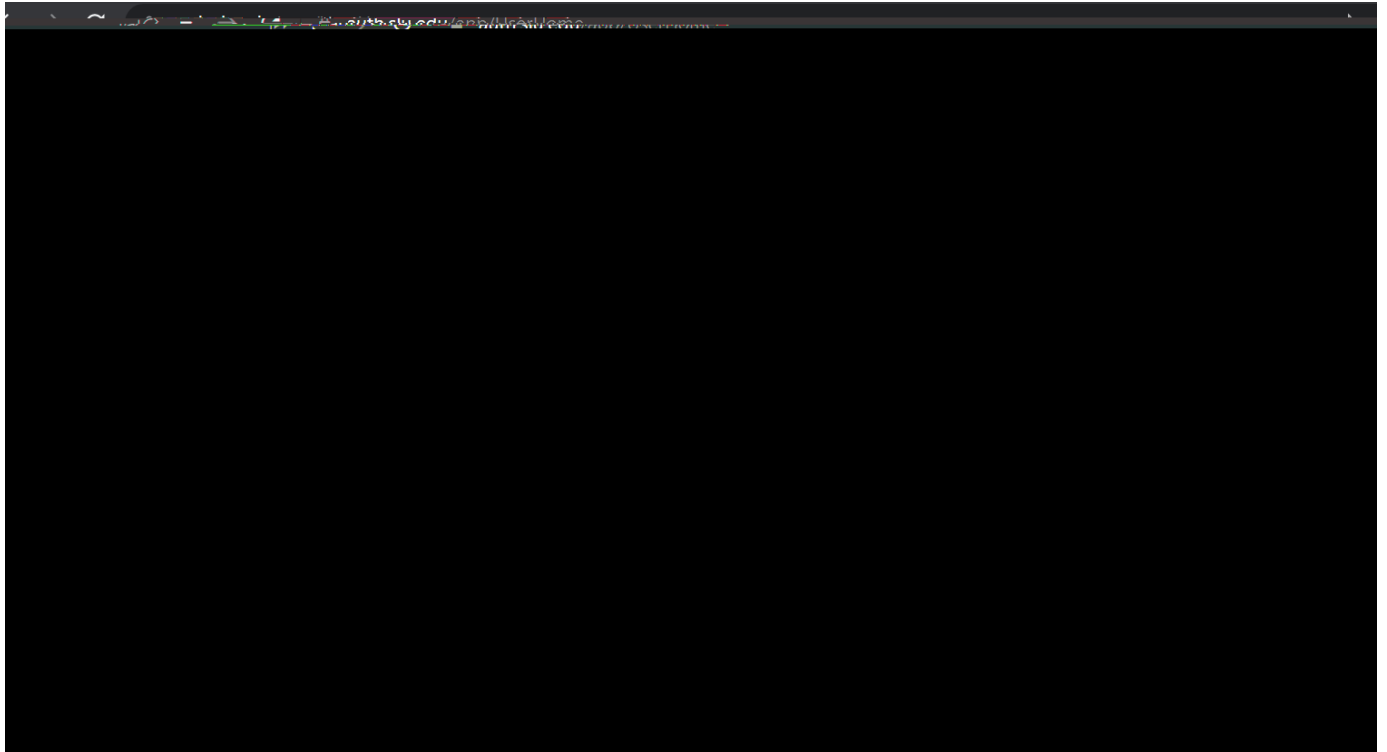
The following terms will appear elsewhere in the document and are important concepts behind the design of the system.

- **Power User Interface** - This refers to the interface you will see when logging into the CMS from the login page within your browser. It contains the Home Page, the Top Navigation Menu, and the view of all tables and forms to which you have access.
- **Table** – Tables contain a set of fields, records, actions, and rules for a specific purpose, such as for managing contracts in Contracts(s)-9 ( ) (gi) (n)-0.8 (l)-1.5 ( ad0.6 (i)-7 5 (n)-0.6 7g)-5.4 ( c)u.5 ( ad05.5 (h)-0u8/

# Logging In and Out

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- Access the system from the [auth.slu.edu](http://auth.slu.edu) page using existing SLU credentials.



- From the Tools tab, choose the Agiloft icon to access the system.
- To log out of the system, click Logout at the upper right of the screen. This will take you back to the login screen.
- The system will also log you out automatically after 30 minutes of inactivity. This is for security purposes and to free up possibly locked records.  
**Note:** If a record is open for edit by you, nobody else can edit it or add notes.

If you need access to the contract management system, but do not see this Icon, contact:  
[agiloftsupport@slu.edu](mailto:agiloftsupport@slu.edu)

# Working in the Web Browser

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Since the SLU CMS is used with your own internet browser, take note of the following tips:

- The CMS works in all modern web browsers, but best in Google Chrome.
- Do not use the browser Back, Forward or Refresh button since this will take you out of the system. The CMS contains all the interface elements you need to navigate within it.
- **You must enable popups in the browser.**
- Always click Save or Cancel when you a (g)1 ( 6r 9d.2 (o)-.5 (e)-4.7 ( e)0d.6 (i)-51 ( t)1..7 (n).5 (g) (u a)-1 .8 (r)-07 (l

## The Status Bar

Above each table view and record form, a status bar provides helpful information about the last actions you performed.

This can include success and error messages and can be very helpful to let you know the results of the actions you took. You will often encounter errors due to incomplete or incorrectly entered data, and the notification will usually indicate what should be entered for the action to proceed as intended.

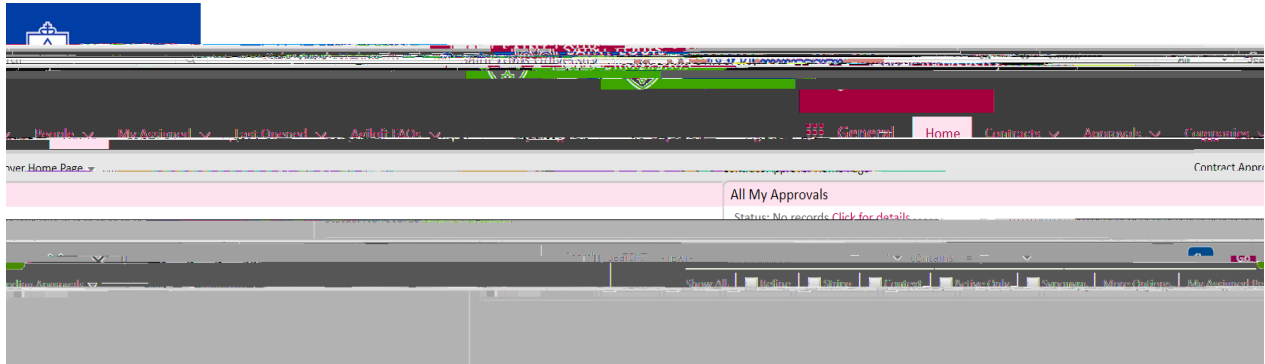




# Home Page

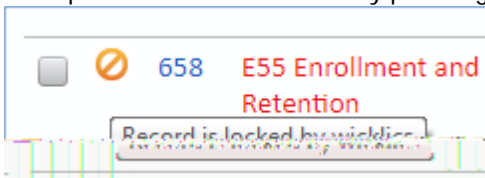
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When you first [log in](#) you will land on the Contract Approver Home Page. This home page displays several widgets and a table view of your Assigned Pending Approvals. To return to the home page at any point you can click the Home link.



If you belong to multiple Teams and the Contract Approver Home Page does not appear for you by default, you can choose it from the Home Page drop down menu. This menu allows you to switch between home pages to which you have access.

1. Clicking Home will take you back to this page.
2. Clicking the Edit icon will open the record for you to make edits. Clicking the hyperlinked ID will open the record for view mode where you cannot make edits. Only one person can edit a record at a time.
3. If instead of the Edit icon you see the "record lock" icon, it means someone else already has this record open for edit. You can hover over the button to see who has it open. In the meantime, you can open the record for view by pressing the hyperlinked ID.



4. Rows in the table can be sorted by clicking on the column headers. An arrow will appear next to the column header once you've sorted it. This table is currently sorted by the ID.

## My Profile

Your profile displays your user record from the Employees table, where depending on your group permissions, you can make changes to some fields.

## The Table View

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The table view opens when you click any table, or one of the saved searches under the heading. It displays a list of records in the current table, refined by any search criteria you have applied.

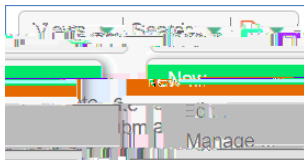
## Managing Views

Table views display a defined list of fields for each record in the table and can be customized to suit your requirements. You can add key fields to the view and use views for displaying charts and reports from the table.

Views control what fields are displayed; searches determine which records are included, and in what order they are returned.

To add a custom view:

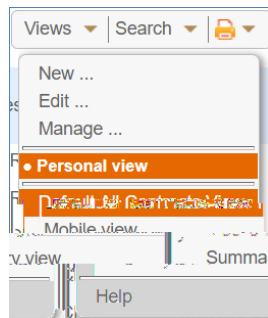
1. Select **Views > New**



2. In the View wizard, define the options for displaying the view, including:
  - a. Whether selection checkboxes should be displayed.
  - b. How many vertical lines should be shown per record and linked field.
  - c. All fields to display in the view, the text alignment, and which fields should be used to open the record in Edit and View mode.
3. In the Order/Colors tab, drag the fields left or right to define the order of fields in the layout.
  - a. Click Set Row Coloring to set a color scheme for the fields.
4. In the General tab, add a name and specify options such as whether the view is deletable, the maximum width of the table, and the number of records to display per page.
5. Apply the view to teams and click Finish.

## Switching Views

To switch to another view, select the Views drop-down and click a different view in the list.



## Printing Record Views

To print all the records in a view:

1. Select a number of records in the view, then navigate to **Print icon > Print/Download Table View**.
2. In the popup screen, click Print.



- o **Export** – opens the import/export wizard where you can the records to another system. For more information, see [Import Export](#)

## Direct Field Edit

Depending on permissions, some fields can be edited and saved directly from the table view, which can greatly aid productivity when working with batches of records. These table view columns will be marked with an edit icon.

To edit the field, click directly on it. This will open the edit mode for the field type, such as a drop-down list or a lookup for a linked field. After entering a new value, select one of the following options:

- **Next** – closes the field edit with the new value kept,

x

## Navigating Between Tabs

Forms will generally contain multiple tabs with their own information, as well as a common area that spans across the top of all the tab content.

To navigate to another tab, you can click on the tab itself or on the arrows to the right of the last tab:

## Embedded Tables

Record forms often contain several embedded table views in the form of related tables. These are

# Conditionally Required and Visible

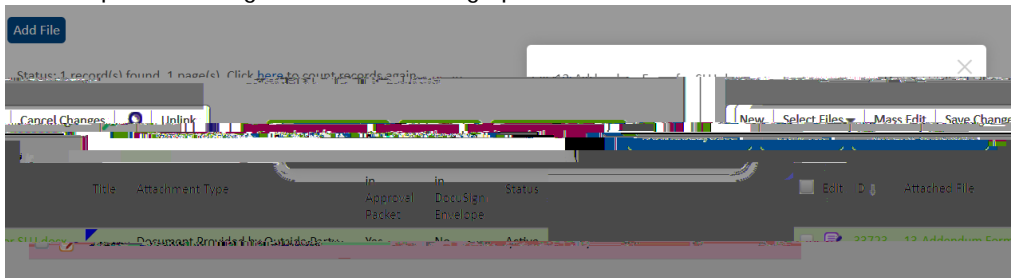
Some fields are restricted from holding more than one file at a time, due to the purpose of the field. If you attempt to add another file by dragging and dropping, you will be prevented with an error.

To manage the files or attach them manually, click Attach/Manage. This will open a dialog where you can click Attach Files to add files manually.

## Direct File Editing

Depending on permissions and the status of contract requests, some Microsoft Office files in the CMS can also be edited directly and saved without having to re-upload them manually. MS Word, Excel, and Powerpoint are supported, though only Microsoft Word supports Track Changes.

1. Click the Word document's name in either in the table view or in the record field.
2. This opens a dialog with the following options:



- a. **Download/Save** – downloads the file to your desktop. Use only when you do not need to make comments or change a document.
- b. **View File** – opens the file in view mode. Use only when you do not need to make comments or change a document.
- c. **Edit and Checkout** – opens the file in edit mode. Saving the document in this mode will automatically sync it in the field. When a file is checked out, it cannot be edited by other users at the same time.

## Renewal / Related Contracts Tab

It is quite common for multiple records in the CMS to be related to each other. For example, a contract may have several subcontracts and amendments, which would normally need to be identified through a search or a related table. The Relationship Diagram field type provides a visual illustration of the relationships between records.

To view the relationship diagram, click the 🌳 icon next to the Diagram field. This opens a tree view of the relationships, with the relationship shown according to the direction of the arrow. For example, the following case shows a parent having an amendment relationship to its child contract and a parent relationship to its parent.



Click the name of a record to open the record in a new screen.

## SLU CMS Tables

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The SLU CMS gives you primary access to several tables that are important for your daily work in the system, as well as secondary access to background tables that you will encounter in the form of related tables or linked fields. These tables hold specific fields and logic such as actions and rules to manage the data they contain and interact with the other tables in the system.

For example, the Attachments table is not shown in top navigation menu, but it contains all the records that are created whenever a document is attached to a record. In the Details tab of the Contracts table, the Attachments table is shown as a view, with logic to limit the records to those related to the current contract.

Clicking on the main table in the top navigation will show you ALL records in that table that your group permissions allow you to access.

Some of the tables you will work with are described below:

### People Table

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# Contracts

The Contracts table contains all contracts in the system. The Approver Group in general has view access to BAAs and Affiliation Agreements, and contracts for their own Department, and contracts for which their Approval Team has been assigned to approve. If you belong to more than one Group, your permissions may be different.

Remember, clicking Contracts in the top navigation menu will show you ALL records in the system you're allowed to see.

## Saved Searches

There are some saved searches pinned under the main Contracts table which gives you filtered access to some of your more important records. Depending on your group permissions, you may see more or less of these searches:

Search	What the search shows...
My Assigned Contracts	Approver is the selected Contract Manager or is the Responsible Party, and the status is in process (everything before active but draft and canceled.)
My Contracts	I'm the Requester or the Responsible Part

## Contract Summaries

The Contract Summaries table displays summary information only about all contracts in the system, including those that are confidential, or outside your departments.

If you have permission to see further into those contracts, you'll be able to click on a link within the Contract Summaries record to take you into the actual Contract record.

## Approvals

This is the main table that you will interact with as an Approver. In general, Approvers can edit Approvals that are Pending Approval and assigned to them

# Summary of Approving Contract Requests in the SLU CMS

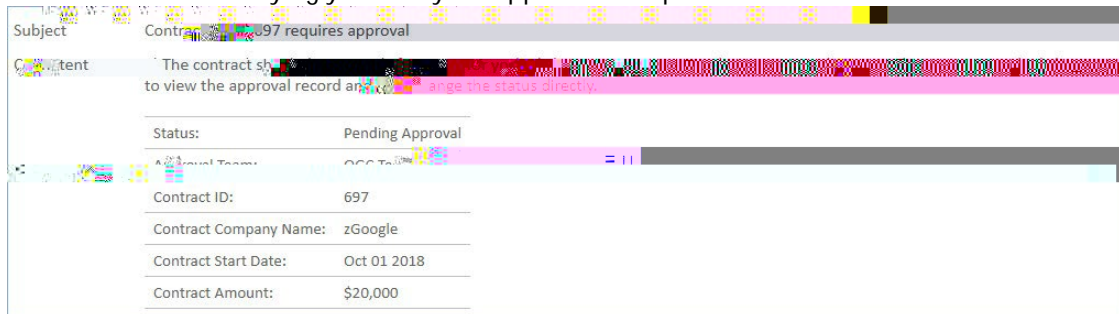
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This section runs through the steps of approving a contract that has been submitted to you through the Contract Management CMS. The steps below represent a typical scenario that should be followed once a contract has been submitted through the CMS. The contract will automatically be routed to you based on a number of factors:

1. You may be on an Approval Team responsible for approving contracts based on answers to the Contract's intake questions or based on the Contract Type.
2. You may be a Department Approver, responsible for approving contracts for your department.
3. You may be an ad hoc approver, added to the list of required approvals by someone else in the contract's workflow.

You will...

1. Receive an email notifying you that your approval is required.



2. You can click the Approve link to immediately approve the request or click the Review link to log into the SLU CMS and open the Approval record. This will give you access to any of the contract request's attachments sent along with the Approval.
3. When you are logged into Agiloft, you will also see any approvals assigned to you in the My Assigned area in the top navigation menu under Approvals or on the Contract Approver Home Page. You can open the approval record by clicking the Edit icon to the left of the record in table view.
4. If needed, edit the contract document using Microsoft Word and the "Edit and Checkout" feature. Changes will automatically be saved in the CMS. To do this, click on the name of attachment to review the document. In the pop-up window, choose "Edit and checkout." Make sure Track Changes is on and add your changes and/or comments.
5. To see other approvers for the contract request, click the Related Approvals tab. If you think the contract request requires additional approvers, add the approval with the correct step number, approver team and approver name and save.
6. Once you have completed your review, and optionally added any other approvers you think are necessary, you can either Approve the record to advance it to the next step in the workflow, or you can Require Changes.
7. Approve it by clicking the Approve button. This will mark your Approval record as "Approved," and remove it from the My Assigned Pending Approvals search.

8.

Click that search to display the results and open the record for review as described in option 2 above.

## Review Pending Approval

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To review the contract request:

1. Get an overview of the Approval by looking at the Approval form and looking at all the

Approval Details

Save | Cancel

Collapse All

Approval Title: TEST - Inmate Care Services Agreement

Request Number	Request Name	Request Description	Requester Name	Requester Title	Department Code
835	SLUCare Clinical Affairs	SLUCare Administration	contractmanager1...	contractmanager1...	D445
1968	SLUCare Clinical Affairs	SLUCare Administration	Mary Lynn Thompson	Mary Lynn Thompson	D445
345	SLUCare Clinical Affairs	SLUCare Administration	Mary Lynn Thompson	Mary Lynn Thompson	D445

Approval Details

Number: 1

Approval Team: InfoSec Team

Approval Approvers: Approver

Records: No records

Step | Appro | Depart | Status

Other sections include:

## Approval Notes

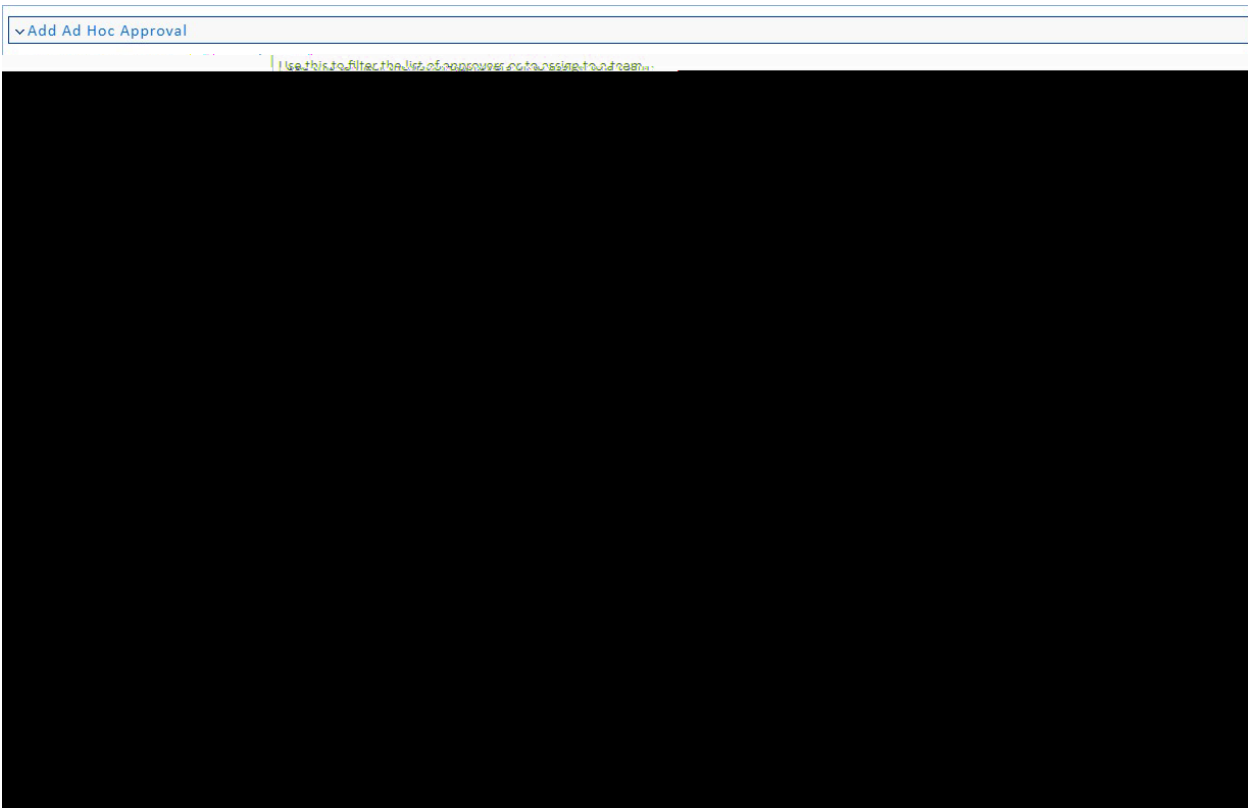
The system requires that you enter Approval Notes if you are requiring changes. You can also use Approval Notes to explain anything you feel is useful or necessary or want to have on record.

## Attachments

Any contract attachment records marked as being included in the Approval packet are listed here. You can click the Attached File name (in blue) to view the attachment, or if allowed, edit the attached document.

[a](#)      [e](#)      [i](#)





## Add Ad Hoc Approver

If there is someone else who should approve the contract request and they are not listed in Concurrent Approvals or Next Approvals, you can add them in the Add Ad Hoc Approval section.

You can choose the Approval Team and/or the Approver. Select the Ad Hoc Approver Team; this will refresh the list of approvers on that team. Then optionally choose the Ad Hoc Approver. Click Add Ad Hoc Approval to create a new approval record in Pending Approval status at the same step as your approval.

Note: The approver you choose must have the appropriate permissions to be able to approve the record.

## Concurrent Approvals

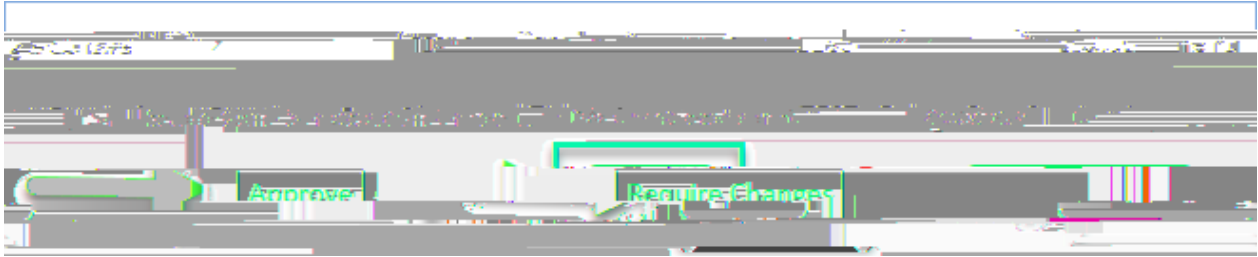
This related table shows all approvals for this contract request at the same step number as the current approval.

## Next Approvals

This related table shows the approvals that are scheduled next in the workflow queue after the current approval.

## Approve Pending Approval

To approve the request, click the Approve button at the top of the form:



## Require Changes for a Pending Approval

If changes are required, add Approval Notes about what kind of change is required and then click Require Changes. This will change the Approval's status to "Requires Change," and notify the Contract Manager that a change is required.

