

SLU Contracts
Contract Management Team

User Guide

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Concepts and Definitions

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

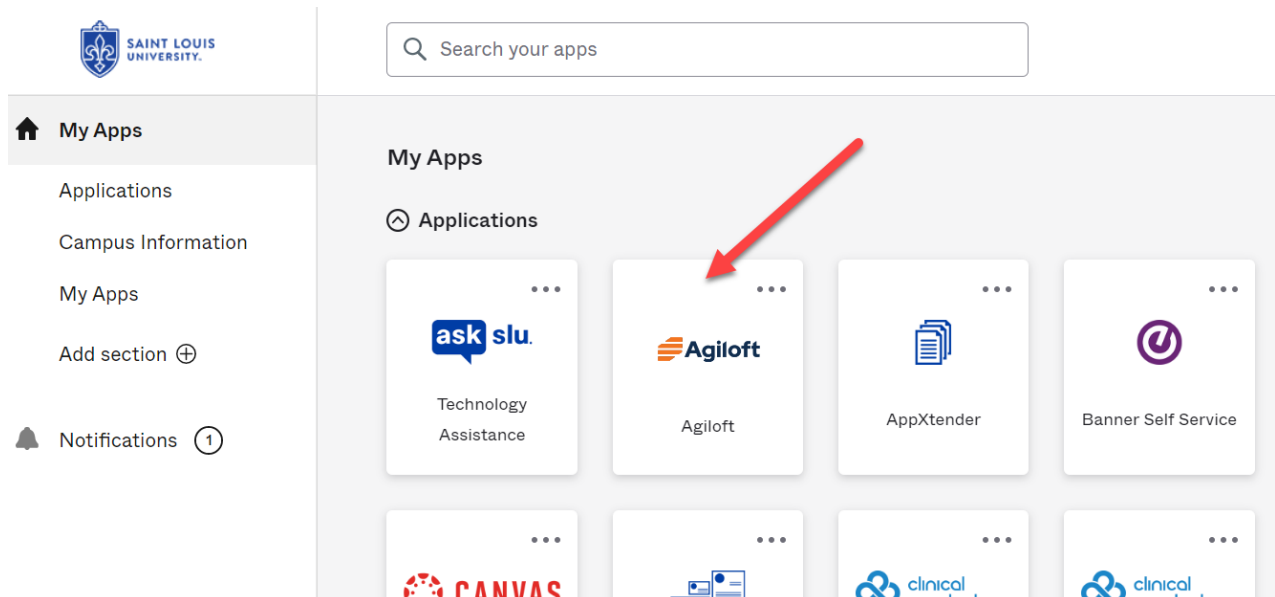
- **Power User Interface** - This refers to the interface you will see when logging into the CMS from the login page within your browser. It contains the Home Page, the Navigation Bar, and The Bento Menu which has a view of all tables and forms to which you have access.
- **Table** – Tables contain a set of fields, records, actions and rules for a specific purpose, such as for managing contracts in Contracts, holding user details in People, and holding company details in Company.
- **Subtable** – Subtables are made up of specifically defined records within a larger table. Tables can be hierarchical and inherit fields and rules from their parents. For example, Employees and External Users might be subtables of the People table, in which case they would automatically contain all the fields from People table as well as their own unique fields.
- **Record** – Each table will have multiple records, which consist of a form with fields. Records represent a single item related to the table subject.
- **Field** – Fields contain all the information in records, such as record descriptions, telephone numbers, attached files, date selectors, and drop-down choices.
- **Single Sign On (SSO)** - A secure access method that allows users to use one login for many applications. For more information see [Single sign-on](#).
- **View** - Determines which fields from a type of record are shown in a list of records in the table view. Views can include row coloring by issue, search filters, and custom column settings. For example, a "Company Name, End Date, and Value" view would show those specific fields from Contracts. For more information see [The Table View](#).
- **Action** – Defined steps that happen when a certain condition is met in the system. For example, all the buttons in the CMS use actions to carry out the steps that happen when they are pressed.
- **Rule** – Statements of logic executed by the system. Rules can contain actions and run when triggered, or on a timed basis.
- **Group** – Groups help secure your instance of the CMS by defining the access permissions that each user has. Group permissions define which tables, records, and fields that users may view or edit, as well as their access to special menu permissions like exporting and setup options.
- **Team** – Teams are used to identify working units of users, such as those that share a role in the system. Teams are used to send email notifications, define working hours, and aspects of the interface such as Views and Saved Searches. Users are assigned to a Primary Team and additional teams if necessary.

Navigating the SLU CMS

This section describes the system in which the SLU CMS was designed, explaining the navigation and user interface elements you will encounter in daily use.

Logging In and Out

- Access the system from auth.slu.edu page using existing SLU credentials.
- From the Apps tab, choose the SLU Agiloft icon to access the system. If you are already signed into that system, clicking the link to the CMS will automatically log you in.



- 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, please contact:

Academic & Administrative Users - Agiloftsupport@slu.edu

Research Users - Contracts@slu.edu

Working in the Web Browser

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.
- 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 are done editing a record or it will be locked from editing by others.
- Nothing is auto saved in the CMS. To save a record, you must click the Save button, which closes the record as well as saving it. In some screens, the Save and Continue button will save the current progress and move to the next screen.

Getting Help

The Agiloft FAQ's menu at the top right of the screen provides links to some useful documentation resources.



The Agiloft FAQ's will take you to Job Aids and Videos which provide training and guides for specific tasks.

 A screenshot of the Agiloft FAQ page. The top navigation bar includes 'General', 'Home', 'Contracts', 'Approvals', 'People', 'Companies', 'My Assigned', 'Last Opened', and 'Agiloft FAQs'. Below the navigation bar, the page title is 'Agiloft FAQs' and 'All Agiloft FAQs'. A message states '18 record(s) found, 2 page(s). Click here to count records again.' Below this is a table with columns for 'Edit', 'View', 'Applies to:', and 'Question'. The table contains six rows of FAQ entries.

Edit	View	Applies to:	Question
		All Contracting Types	How can I change my Agiloft home page view?
		All Contracting Types	What does the "My Contracts in Progress" view show in the contract management home page?
		All Contracting Types	What does the view "My Pending Approvals" show in the contract management home page?
		All Contracting Types	What is show in the Contracts Pending my Action view in the contract management action home page?
		University Contracting	How do I route an SSA template using DocuSign if I am the contract manager routing for signature?
		University Contracting	How do I route a contract for e-Signature in DocuSign as a contract manager?

The Contract Management Home Page provides other links, and an easy link for emailing SLU Contracts help.

For help using the SLU CMS, please email agiloftsupport@slu.edu for academic and administrative units or contracts@slu.edu for research related contracts

To access Agiloft's generic help and tutorials, please visit <https://www.agiloft.com/tutorials.htm>

For SLU CMS documentation and resources, please visit <https://www.slu.edu/busfin/departments/business-services/contract-management-system>

The Status Bar

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

Status: Contract #620 successfully updated. 56 record(s) found, 2 pages.

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.

The status also reports on search results. Select the Click for details... link for more information on the

search results.

Status: 47 record(s) found, 1 pages [Click for details....](#)

Inline Help

In addition to this, the on-screen text often provides assistance in how to carry out tasks in that part of the system.

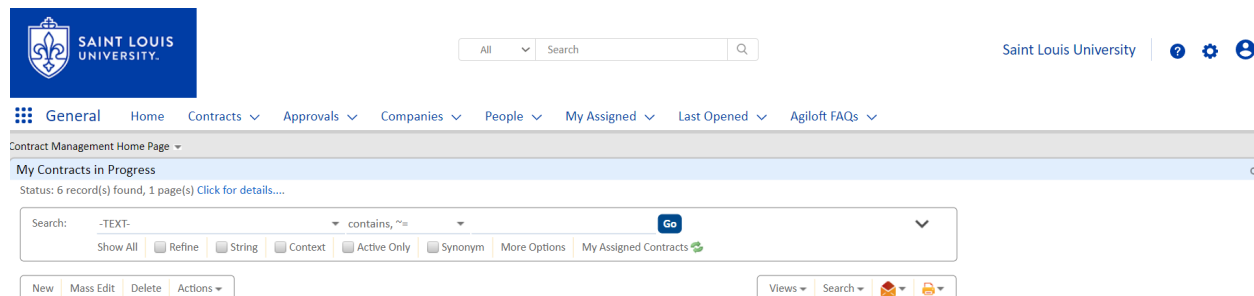
By default, this searches only the fields in the **Attachment** table and its subtables.

Tip: To see all records, leave the search box empty.

On the Contract Intake Form (the Details Tab) if a user hovers over each field, there is helper text to assist them in answering the question.

System Navigation Menu

The main navigation menu is located on the top toolbar.



It contains links to the following sections:

- Bento (9 dots menu) – click VIEW ALL for a listing of all commonly used tables such as contract summaries
- General (description of toolbar)
- Contracts – includes a listing of contracts you have access to view and any saved searches that are relevant to your role
- Approvals – any relevant approvals to your role, if applicable
- Companies – listing of company entries in Agiloft
- People – listing of people in Agiloft (external and internal contacts)
- My Assigned – contracts or approvals assigned to you
- Last Opened – the last 3 records you opened
- Agiloft FAQ's- Shown as a list of help topics, Q&A, manuals and guides; click on the question to view the answer

Home Page

When you first [log in](#) you will land on the Contract Management Home Page. This home page displays

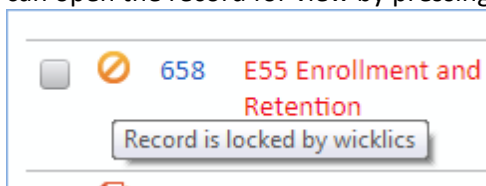
several widgets, including the Navigation Menu discussed above, and table views of contracts (My Contracts in Progress and Contracts for my Departments). To return to the home page at any point you can click the Home link.

My Contracts in Progress displays all contracts for which you are the Contract Manager or the Responsible Party, and the status is in progress.

Contracts for my Departments shows all contracts for your own Department, or for Departments you're assigned as a contract manager.

For questions or new user onboarding requests for University, please email SLU Agiloft Administrators.
For Research, please email contracts@slu.edu.

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

The table view opens when you click any table heading in the navigation bar, 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.

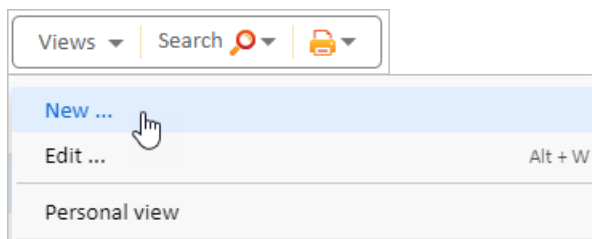
Managing Views

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:

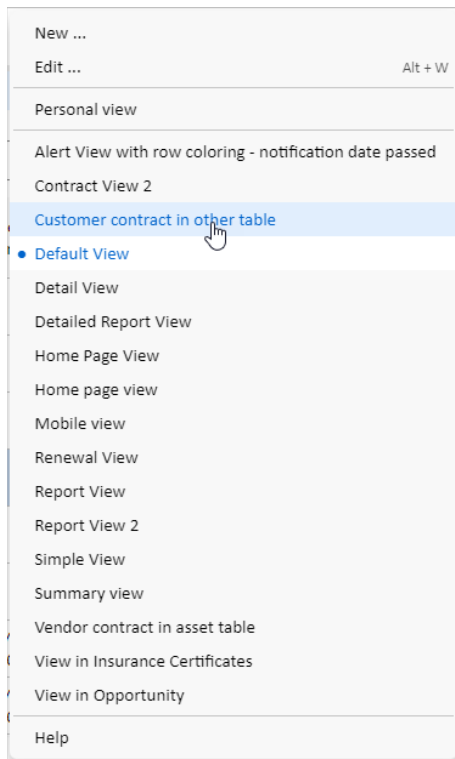
1. Select **Views > New**



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:

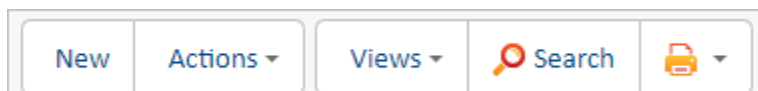
1. Select a number of records in the view, then navigate to **Print icon > Print/Download Table View**.
2. In the popup screen, click Print.

Sorting Records in a View

Click the field heading to sort the records by that column. To add a second sorting column, hold down SHIFT on your keyboard, and click the second column heading on which you want to sort.

Searching in Tables

To search for a record in Agiloft, use the search button at the top of the table you want to search:



There are several default fields to search, but you can add one by using the “Add Filters” button:

Contract term in months	Renewal Type	What is the annual value of the contract?	What is the aggregate value of the contract?
2	Notify staff to renew	\$20,000.00	\$10,000.00
2	Notify staff to renew		
2	Notify staff to renew	\$1.00	\$1.00
2	Notify staff to renew	\$2.00	\$2.00
2	Notify staff to renew	\$1.00	\$1.00
0	Notify staff to renew	\$0.00	\$0.00

New
Actions ▾
Views ▾
Search
Print ▾

Search Clear All Filters

String
 Context
 Synonym
 Active Only
 ⚙️

Status

young
▾

Contract Category

🔍

Contract Type

🔍

Department

🔍

Apply

+ Add filters

Saved Searches are available from the Top Left or from the Navigation Menu:

Contracts

All Contracts ▼

- New ...
- Edit ...
- Manage ...
- Help

Show All

- Active Contract expiring within next 90 days (C)
- Active Customer Contracts (C)
- Contract with Downstream Entity
- Contracts in Draft Status
- Contracts with an in process Status (C)
- Contracts with Cost Escalation Provisions
- Customer Support Contracts expiring within 12 months (C)
- Drafts
- My Assigned Contracts
- My Assigned Pending Approvals
- My Contracts
- My Drafts
- Rpt: Downstream Entities and Status is not terminated, canceled or expired
- Status is Pending Approval
- VP Architecture Alerts

New Actions Views Search

Contract term in months	Renewal Type	What is the annual value of the contract?	What is the aggregate value of the contract?
2	Notify staff to renew	\$20,000.00	\$10,000.00

Field

Operator

Value

Done

Search

Text search

String Context Synonym Active Only

Status

Contract Category

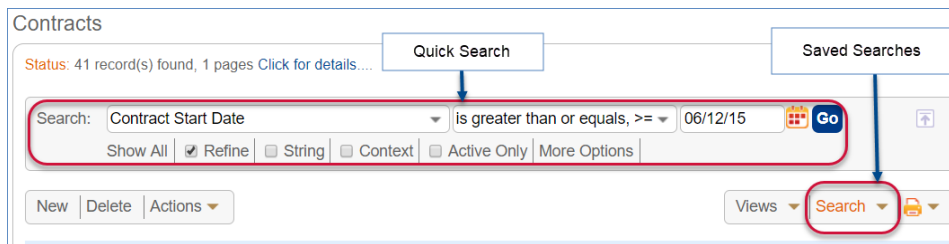
Contract Type

Department

Apply

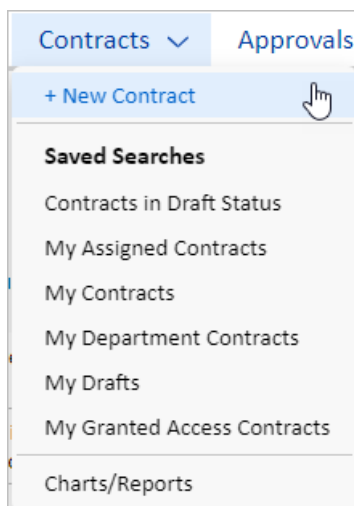
+ Add filters

In every table view you can search for records by pressing the search button and then typing in your search term. This is called a [Quick Search](#); for a more complex search you can use a [Saved Search](#).

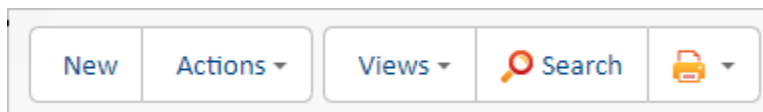


The search functionality is very advanced and allows you to use various operators and refine results with additional search parameters. You can also specify the order of the results that are returned.

Refer to [Help > Reference Guide](#) in the Agiloft FAQ's of the SLU CMS for assistance on how to use searches effectively to improve your productivity. For example, you could set up a saved search of all Contracts owned by you where the status is Pending Contract Manager, and the start date is the coming month, sorted by start date. This search could be pinned to your Navigation Bar for quick access, by dropping down the Contracts navigation tab item.



Action Bar



Above each table, the action bar contains some useful functions for managing the records.



Some of these functions might include...

- **New** – create a new record in the table.
- **Actions** – perform the following actions on the table:
 - **Export** – opens the import/export wizard where you can the records to another system.

For more information, see [Import Export](#).

- **Views** – see [Managing Views](#) for more information.
- **Search** – see [Searching in Tables](#) for more information.
- **Print** – offers several options for printing items from the table. These include the table view, all fields from the table, [print templates](#), and print documents that have been added to the table.

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.

The screenshot shows a table view with a column header 'Attachment Type' and a sub-header 'Attached File'. Below the header, a dropdown menu is open, showing the selected value 'Document Provided by Outside Party'. At the bottom of the dropdown, there are three buttons: 'Next', 'Save', and 'Cancel'.

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, but not saved. Many fields can be kept ready for saving. To save or cancel all the changes together, click Save Changes or Cancel Changes from the action bar.
- **Save** – closes the field with the new value saved.
- **Cancel** – closes the field with the new value not saved or kept.

Viewing or Editing a Record

When you look at the list of records in a table view, you will see that some of the columns are hyperlinked. The Edit column and field description columns such as Contract Title open the record in edit mode, while the ID link opens in view-only mode.

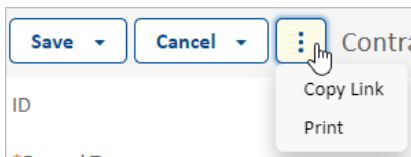
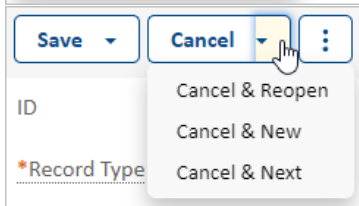
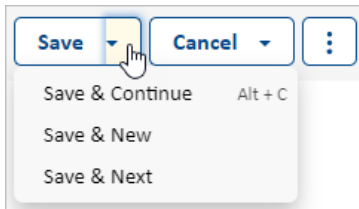
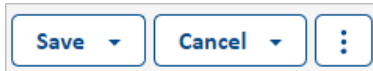
The screenshot shows a table with three columns: 'Edit', 'ID', and 'Contract Title'. The first row has a checkbox, a red edit icon, the ID '367', and the text 'ZOHO Corp 2016/2017'. The second row has a checkbox, a red edit icon, the ID '366', and the text 'IT Contract for Xmatters'.

Edit	ID	Contract Title
<input type="checkbox"/>	367	ZOHO Corp 2016/2017
<input type="checkbox"/>	366	IT Contract for Xmatters

Once a record has been opened, you can tell whether it is in view or edit mode by the buttons at the top. In view mode, the top will show Edit and Close buttons, whereas in edit you will see Save and

Cancel buttons. **Save** **Cancel** Note that if you do not have edit permissions you will only see the Close button in view mode.

In edit mode you will see input boxes, drop-downs for choice fields, and radio buttons to help lookup and select the field values. Only one user may edit a record at a time, and while editing the record is locked from editing for anyone else, although multiple people can still view the record while it is being edited. It is good to get into the habit of saving or cancelling the record when you take a break.

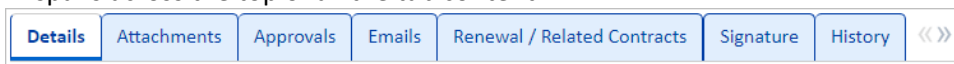


Using the Record Form

Record forms can be very large, consisting of many different field types, action buttons, related tables, and tabs that will navigate you through the record workflow. The tips below will help familiarize you with the elements you will encounter in various records, including some special field types.

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 basically the same as the standard table view, but the records refer to the related table. For example, the All Contract Attachments section on the Attachments tab of the Contracts form shows a table view of the Attachments table.

All Contract Attachments							
Attachments can include Certificates of Insurance, Bid Documents, Advertising, Emailed Notes, Supporting Documents, Documents from Outside Party, and							
Status: 1 record(s) found, 1 page(s). Click here to count records again..							
New Select Files Mass Edit Save Changes Cancel Changes Unlink				Views Search Print			
<input type="checkbox"/> Edit	ID ↓	Attached File	Title	Attachment Type	Include in Approval Packet	Include in DocuSign Envelope	Status
<input type="checkbox"/>	27880	Supporting Document 001.pdf	Sample Contract	Document Provided by Outside Party	Yes	No	Active

Required Fields

Some fields must be filled out before the record can be saved. These will be indicated with a red asterisk.

Financial	
*Do you anticipate that the University will be paying this Company or Individual?	<input type="text" value="No"/>
What is the annual value of the contract?	<input type="text" value="\$"/>

If you try to save the record with one of these fields not yet filled in, you will be prevented with an on-screen pop-up notification.

Conditionally Required and Visible Fields

Some fields will become mandatory if a certain condition happens. In addition, many fields will not be visible unless a condition happens, such as another field value being selected. In SLU's system, this often happens based on the Contract Type or print template selected.

Looking Up Record Data

You will often encounter fields that use a lookup icon; these are linked to another table and require you to find the relevant record from that table to import it into the field. For example, the Company Name field for Contract Party Information is a linked field lookup to the Companies table.

1. Click the lookup next to the field
2. Search for the record name and click Go.
3. Select the arrow next to the field to import it.

Look Up Company
□ ×

Go

Show All
Advanced Search
Create new
-- Select -- ▾

▼ Search Options

Company Name
 String

All text fields
 Context

All linked fields

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page

Go

Edit	ID ↓	Company Name	Primary Role	Status	Main State / Province	Banner ID
↩ 📄	8270	Seb Co	Vendor	Active	AZ	
↩ 📄	7938	Samantha Major	Vendor	Active	GA	
↩ 📄	7937	Ryan Petteway	Vendor	Active	OR	
↩ 📄	7935	Anna Riley	Other	Active	MO	
↩ 📄	7934	The JED Foundation	Vendor	Active	NY	
↩ 📄	7932	Mary B. Winfrey	Vendor	Active	MO	
↩ 📄	7931	Alexandra Hays	Vendor	Active	MO	
↩ 📄	7930	Patients Out of Time	Vendor	Active	VA	
↩ 📄	7929	Champaign-Urbana Public Health Department	Partner	Active	IL	
↩ 📄	7928	Spine Course	Vendor	Active	MO	
↩ 📄	7927	Nemanick Leadership Consulting	Vendor	Active	MO	

Cancel

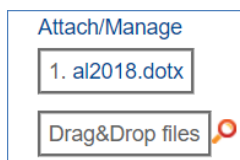
Clear Field and Close

Note that this will often populate multiple detail fields at once.

Attached File Fields

You will often work with attached documents, particularly in Microsoft Word format. These make use of the file with versioning field type, and it is helpful to understand some aspects of this type of data.

To add documents to the field, simply drag them from your desktop into the Drag&Drop files field. The field will automatically upload the new document.



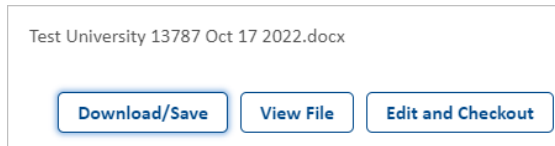
Some fields are restricted from holding more than one file at a time, due to the purpose of the field. If you attempt to add another file by dragging and dropping, you will be prevented with an error.

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 Word files in the CMS can also be edited directly and saved without having to re-upload them manually.


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:

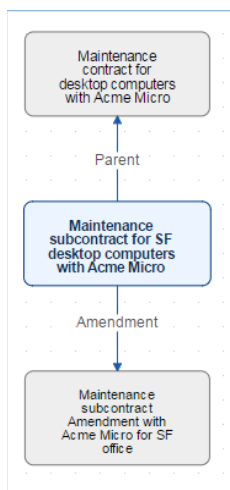


- a. **Download/Save** – downloads the file to your desktop where you must open, edit and re-upload it manually.
- b. **View File** – opens the file in view mode. Click Enable Editing to edit it, and re-upload it manually if needed.
- c. **Edit and Checkout** – opens the file in edit mode. Saving the 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

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 your top navigation bar pane, 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 bar 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

The People table uses two sub-tables to distinguish between Employees and External Users and holds the details of all employees and contacts in the system. The details of these people are used to populate your contracts, which can often happen by performing a lookup on their name. Whenever a contract is added, the contact details are automatically created in the People table.

The People table also keeps a record of the email addresses and emails sent and received for each user.

Companies Table

The Companies table holds the details of all companies in the system. Companies are assigned roles based on their relationship to the company, such as vendors, partners or customers.

Workday is still the system of record for SLU. New companies that you may add to Agiloft do NOT automatically get added to Workday.

Editing Companies and Contacts

Sometimes when you receive a contract request it will have the Contract Party Entry marked as New Company. This happens when the requester cannot find the company in the system and instead has submitted the new company information. If the requester has forgotten to create the new company by clicking the Create Company button himself, you should review the information and create the company.

To search to see if the company is in the system already you can change the Contract Party Entry radio button to Existing Company and use the magnifying glass next to Company Name to lookup existing companies.

Once you've established that the company record doesn't already exist and the new company information is valid, the new company will be created when your contract is Submitted.

If you want to edit any information about an existing company, such as contacts or company name, you can open the record by clicking on the hyperlinked Company Name.

From within the company record you can edit the company name and other key information such as their role, website and contact details.

The Company form's Address and Contacts tab contains embedded views for the People / External Users

table, and allows you to complete the following actions:

1. Create a new Contact by clicking the New dropdown and choosing External User.

View Record: Seb Co

Edit Close Company: Seb Co

ID 8270 *Status Active

*Company Name Seb Co Banner ID

Parent Company

Key Info Address and Contacts Related Records Security Emails History << >>

Collapse All

Key Info

*Primary Role Vendor Company Roles Vendor

Is this Company a Downstream Entity?

Area Code Telephone Extension

Fax

Business Structure

Ongoing Notes

External Signer Signature Requirements

*Signature Options Accepts e-signatures

Signature Notes

View Record: Seb Co

Edit Close Company: Seb Co

ID 8270 *Status Active

*Company Name Seb Co Banner ID

Parent Company

Key Info Address and Contacts Related Records Security Emails History << >>

Collapse All

Address Information

Main Street Address 1114 20 av NW Main Street Address 2

Main Street Address 3

Main City Calgary Country USA

US State AZ

Main State or Province MO

Main Zip or Postal Code 12345

Address 1, 2 and 3 Comma 1114 20 av NW Formatted

Address 1, 2, and 3 in Block 1114 20 av NW Format

Child Companies

Child Companies

Status: No records.

Views

Edit an existing Contact by clicking Edit on the existing Contact record.

Company

Save Cancel

Key Info Address and Contacts Related Records Emails History

Expand All | Collapse All | Default View

ID 49

*Company Name zGoogle

Parent Company

Contact

Email Address

*Status Active

Banner ID

> Address Information

v All Company Contacts

Status: 1 record(s) found, 1 page(s). [Click here](#) to recount records.

New Views

Edit	ID	Full Name	Roles	Email	Direct Phone
<input type="checkbox"/>	778	External Reviewer	Main Contact	careytestagiloft+sluexternalreviewer@gmail.com	

Once you have added new contacts you can choose them in the contract record.

Contracts

The Contracts table is the main processing area you will use in the system to create and manage your contracts. The Contract Management Group in general has permission to edit all contracts in the system they've been assigned as Contract Manager, as well as view access to BAAs and Affiliation Agreements, and contracts for their own Department. If you belong to more than one Group, your permissions may be different.

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

Contracts

Saint Louis University Dev Contract manager

General Home Contracts Approvals Companies People My Assigned Last Opened Agiloft FAQs

Contracts
New Actions Views Search

My Contracts
2 record(s) found, 1 page(s) [Click for details...](#) | [Clear All Filters](#)

Edit	ID	Status	Contract Category	Contract Type	Contract Title	Department	Business Unit	Company Name	Contract Effective Date	Contract End Date	Contract Term in Months	Renewal Type	What is the annual value of the contract?	What is the aggregate value of the contract?
<input type="checkbox"/>	13798	Active	Academic Agreements	Academic Affiliation Agreement	Test	D006 Admin Social Work	Academic Affairs	Seb Co			12	Notify staff to renew	\$10,000.00	\$10,000.00
<input type="checkbox"/>	13797	Pending Approval	Academic Agreements	Academic Affiliation Agreement	Test Agiloft	D006 Admin Social Work	Academic Affairs	Seb Co			12	Notify staff to renew	\$20,000.00	\$10,000.00

Saved Searches

There are many saved searches pinned under the main Contracts table in your navigation bar, which gives you filtered access to some of your more important records:

Search	What the search shows...
--------	--------------------------

My Assigned Contracts	CM is the selected Contract Manager or is the Responsible Party, and the status is in process (everything before active but draft and canceled.)
My Assigned Pending Approvals	Status is Pending Approval, I'm the approver, or am on the approval team and there's no specified approver, or I'm one of the Department Approvers for this approval, or it's pending approval by the CMs for this dept.
My Contracts	I'm the Requester or the Responsible Party.
My Department Contracts	All contracts for the Contract Manager's own Department, as well as any other Departments I've been granted view access to via my Employee record by admins. Also includes all contracts for departments assigned to as a Contract Manager.
My Drafts	Status is Draft and I'm is the Requester or Responsible Party.
My Granted Access Contracts	All contracts for which I've been granted special access via Employee record – additional Business Units, Divisions, or Departments OTHER than my own. Also includes Contracts for which I've specifically been named as having view access – this would expose confidential contracts.

The [Processing Contracts](#) section walks through some of the elements you will encounter in the various tabs in this table.

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.

Summary of Contract Management in the SLU CMS

This guide runs through the steps of reviewing 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 assigned to you based on the prepopulated Business Unit, Division, and Department assignments.

You will...

1. Receive an email notifying you that a requester has submitted a contract for your review. Initially, this information is for notification purposes only because the contract first routes through Contract Type and Compliance approvals.

The contract shown below has been submitted for review by Laurie Boice.

Click [here](#) to edit the contract.

Responsible Party/Internal Contract Owner:	Laurie Boice
Contract Title:	Sample - Pre-Training zGoogle SSA 2018
Description:	Drury displays, billboards for Winter 2018.
Renewal Type:	One time contract
Contract Effective Date:	Oct 01 2018
Contract End Date:	Sep 30 2019
Company Name:	Drury Displays Inc

- If an approver requires changes, you will receive a notification and you can act on that instruction to make the changes, and either send it back to the approver for review, or mark it as not needed. The status of the contract will be Pending Contract Manager because it requires changes.

A change has been requested for contract #593 ID:[omujv2/2070/861] Inbox x

do-not-reply-slucontracts@agiloft.com

to careytestagiloft+sluadmin ▾

An approver has requested a change for contract #593, described in more detail below. Please click [here](#) to review the approval record.

ID:	861
Status:	Requires Change
Contract ID:	593
Date First Approved/Rejected:	Sep 22 2018 11:08
Approved/Rejected By:	Agiloft Implementer

- Once all initial approvers have approved the request, you will receive a notification that your approval and review as Contract Manager is required. The contract will also be listed in the My Assigned Pending Approvals search in your navigation bar.
- When the contract is ready for Contract Manager review, double check the information provided in the Contract record on the Details tab, and review the Compliance Intake Questions to make sure the appropriate parties have been identified and completed their reviews. Create the company and contact as required if the requester did not do so.
- Use the Emails tab to communicate with the requester or approver over any changes. You will receive email notifications of any new communications, and these messages are saved to the CMS.
- If needed, edit the contract using Microsoft Word and the "Edit and Checkout" feature. Changes will automatically be saved in the CMS.
- Use the Email tab as needed to email the third party requested changes.
- If you think the contract request requires additional approvers, add them on the Approval tab at the appropriate step number (before or after Department Approvers).
- When contract is in final status (successfully approved by all the initial approvers, and it passes your own review), approve your own approval record. This will automatically launch Department-level approvals and any additional approvals necessary for the contract before signature.

10. As with the initial approvals, handle any changes required by the Department–level and adhoc approvers.
11. When all changes and approvals are complete, edit the Word document to accept all changes and stop tracking, create the DocuSign Envelope, and send it out for signature.

Overview of Contract Tabs

The Contract form is divided into tabs across the top, each of which is grouped into sections to organize the information:

The screenshot displays the Saint Louis University Contract Manager interface. At the top, there is a navigation bar with the university logo, a search bar, and the user's name 'Contract manager'. Below this is a menu with tabs: General, Home, Contracts (selected), Approvals, Companies, People, My Assigned, Last Opened, and Agiloft FAQs. The main form area is titled 'Contract: Test Agiloft' and contains the following fields:

ID	13797	Legacy Contract	No
*Record Type	Contract	Parent Contract ID	
*Is this contract confidential?	No	Granted Access	
*What Business Unit are you submitting this on behalf of?	Academic Affairs		
*What Division or School are you submitting this on behalf of?	S01 CPHSJ- Social Work		
*Department	D006 Admin Social Work		
*Contract Category	Academic Agreements	*Contract Type	Academic Affiliation Agreement
Status	Pending Approval	*Contract Manager	Contract manager Test

Below the form fields is a progress bar showing the status: Pending Contract Manager, Pending Approval (highlighted), Pending Signature, Approved, Signed, and Active.

The form is organized into tabs: Details, Attachments, Approvals, Emails, Renewal / Related Contracts, Signature, and History. The 'Details' tab is active, showing a 'Collapse All' button and two sections:

- SLU Requester Demographic Information:**
 - *Requester Name: Contract manager Test
 - Requester Email: slacassagne+SLUContractManager@gmail.com
 - *Responsible Party/Internal Contract Owner: Contract manager Test
 - *Responsible Party Email: slacassagne+SLUContractOwner@gmail.com
 - Responsible Party, Secondary Full Name:
 - Responsible Party, Tertiary Full Name:
- Contract Information:**
 - *Contract Title: Test Agiloft
 - *Brief Description of Contract: Test Agiloft, Please ignore

At the bottom, a note states: "Choose whether the contract is effective upon final execution of the contract, or upon a date you choose. NOTE: Do not choose 'date of last signature' for Legacy Contracts. Enter the actual effective date. If 'Date of Last Signature' is selected, the Contract Effective Date will be set automatically when DocuSign receives the last signature."

Details	Attachments	Approvals	Emails	Renewal / Related Contracts	Signature	History	«»
Collapse All							
▼ SLU Requester Demographic Information							
*Requester Name	Contract manager Test	Requester Phone					
Requester Email	slacassagne+SLUContractManager@gmail.com						
*Responsible Party/Internal Contract Owner	Contract manager Test	*Responsible Party Email	slacassagne+SLUContractOwner@g				
Responsible Party, Secondary Full Name		Responsible Party, Tertiary Full Name					
▼ Contract Information							
*Contract Title	Test Agloft						
*Brief Description of Contract	Test Agloft, Please ignore						

Details Tab

The Details tab shows you basic information about the Contract, including what part of the University it's for, who requested it, who's responsible for it, the contract term, counterparty, and all of the important legal and compliance questions that determine who the contract must route to initially.

Special Fields for Contract Manager

Some fields are not visible to the Requester, but are to the Contract Manager and should be noted:

- **Granted Access** – used to grant individuals access to this contract. This can be used for confidential contracts, when you need to ensure that particular individuals have view access to it.

*Is this contract confidential? No Granted Access

Attachments Tab

The Attachments tab shown below is used to manage contract documents and makes use of [print templates](#) to generate standard forms out of the fields in the current contract. Documents can also be uploaded directly to the File Upload field on the Details tab, which is an [attached file field](#), and allows you to define the document type.

All attachments linked to this contract appear in the Contract Attachments related table on the Attachments tab.

Contract: Test Social Work Agreement

ID: 13773, Legacy Contract: No

*Record Type: Contract, Parent Contract ID: [Search]

*Is this contract confidential?: No, Granted Access: [Search]

*What Business Unit are you submitting this on behalf of?: Academic Affairs

*What Division or School are you submitting this on behalf of?: S01 CPHSJ- Social Work

*Department: D006 Admin Social Work

*Contract Category: Academic Agreements, *Contract Type: Academic Affiliation Agreement

Status: Pending Approval, *Contract Manager: Beth Barrett

Progress: Pending Contract Manager → **Pending Approval** → Pending Signature → Approved → Signed → Active

Details | **Attachments** | Approvals | Emails | Renewal / Related Contracts | Signature | History

Document Generation

Create and Attach Contract

All Contract Attachments

Attachments can include Certificates of Insurance, Bid Documents, Advertising, Emailed Notes, Supporting Documents, Documents from Outside Party, and more. Approvers can easily access these documents if they are included in the Approval Packet.

Status: 1 record(s) found, 1 page(s). Click [here](#) to count records again..

Edit	ID	Attached File	Title	Attachment Type	Include in Approval Packet	Include in DocuSign Envelope	Status
	27869	Test Company SWAAA 13773 Sep 20 2022.docx	Generated Draft Contract	Generated Agreement from Template	Yes	No	Active

1. You can upload additional files by dropping them into the File to Upload field on the Details tab, choosing an attachment type and clicking the Add File button. If you choose a file to replace it will mark the previous file as Superseded.
2. You can also add files via the Attachments tab. The [Action Bar](#) appears at the top of most tables in the SLU CMS and allows you to complete actions on the records in the table. In this case the

action bar performs actions on the related Attachments table that has been embedded in the record. The choices available to you depend on your group permissions, but the most common actions are:

- a. **New** – create a new Attachment record - you can also do this by dragging them into File to Upload.
 - b. **Unlink** – remove the attachment from the record; this is safer than deleting it because an admin can bring it back later if it was unlinked by mistake.
 - c. **Save Changes** – saves any unsaved changes made to the records in the table view below during [quick edit](#), but it does not save the Contract record.
3. You can edit/view attachments by clicking on their filename. For Word files this will open a popup with the following options:
 - a. **Download/Save** - downloads the file onto your desktop.
 - b. **View File** - opens the file in Word but will not be editable.
 - c. **Edit and Checkout** - opens the file in Word and saves any changes made there back into the SLU CMS upon saving the file in Word. For all other attachment types the file will be downloaded onto your desktop.
 4. The table shows the list of all attachments. When a file is ready to be sent for signature you can mark it Yes for Include in DocuSign Envelope. This is a [quick edit](#) field.

Attachment records have specific attachment types. An explanation of these types is below:

Attachment Type	Description
Document Ready for Approval	Requesters can attach documents of this type if they require approval.
Supporting Document	Any Supporting Documents can be uploaded under this type.
Insurance Certificate	For Insurance Certificates.
Document Provided by Outside Party	Documents provided by outside parties can be uploaded under this type. This type is also used when people outside of the system email documents to the contract record.
Fully Executed Agreement	This attachment type is used by the document that comes back from Adobe Sign signing.
Generated Agreement from Template	Attachment has been generated automatically from a template. These will be included in most requests.

Approvals Tab

In the SLU CMS, Intake and Contract Type approvals will automatically be generated and launched when the requester submits the contract for review.

Approvals Needed

Status: 5 record(s) found, 1 page(s). [Click here](#) to count records again..

New Mass Edit Unlink Actions

Views Search

ID	Approval Title	Step Number	Approval Team	Department Approver Names	Status	Approver	Date Created	Date First Approved/Rejected	Date Finally Approved/Rejected
32684	Test - Non-HDW (MARCOT Team)	1	MARCOT Team		Pending Approval		Nov 02 2022 15:39		
32685	Test - Non-HDW (Compliance Team)	1	Compliance Team		Pending Approval	Ron Rawson	Nov 02 2022 15:40		
32686	Test - Non-HDW (InfoSec Team)	1	InfoSec Team		Pending Approval		Nov 02 2022 15:41		
32687	Test - Non-HDW (Export Controls Team)	1	Export Controls Team		Pending Approval		Nov 02 2022 15:42		
32683	Test - Contract Manager	2			Queued	Contract manager Test	Nov 02 2022 15:39		

Number of Approvals Needed 5 Number of Approvals Completed 0 [Calculate](#) Number of Approvals Requiring Change 0

If necessary, the Contract Manager or an Approver can generate additional approvals on an adhoc basis. The approvals can be seen in the related table of Approvals Needed, shown below.

Once all approvals in the first step are approved, the next step approval(s) are set to Pending Approval. A table of all Concurrent Approvals (those with the same Step Number) are shown in the second tab of an approval record, Related Approvals. All approvals in the next step of the workflow are shown in the table of Next Approvals.

Concurrent Approvals

Any approval records with the same step number as this approval are shown here.

Status: 3 record(s) found, 1 page(s). [Click here](#) to count records again..

Views Search

ID	Step Number	Status	Approval Title	Approver	Approval Team	Approved/Rejected By
32687	1	Pending Approval	Test - Non-HDW (Export Controls Team)		Export Controls Team	
32686	1	Pending Approval	Test - Non-HDW (InfoSec Team)		InfoSec Team	
32684	1	Pending Approval	Test - Non-HDW (MARCOT Team)		MARCOT Team	

Number of Open Concurrent Approvals 3

Next Approvals

The approval(s) next in the workflow queue for this contract are shown here.

Status: 1 record(s) found, 1 page(s). [Click here](#) to count records again..

Views Search

ID	Step Number	Status	Approval Title	Approver	Approval Team	Approved/Rejected By
32683	2	Queued	Test - Contract Manager	Contract manager Test		

Approvers can click Approve or Require Changes in their assigned approvals:

Save
Cancel
Approval: Test - Non-HDW (MARCOM Team)

ID	32684	Status	Pending Approval	Bypass Requested for this Approval	No
Approval Title	Test - Non-HDW (MARCOM Team)				
	<input type="button" value="Approve"/> <input type="button" value="Require Changes"/>				
	<input type="button" value="Mark as Not Needed"/>				

[Contract Details](#)

Details
Related Approvals
Emails
History
« »

Expand All | Collapse All | Default View

Approval Details

*Step Number	1			
Approval Team	MARCOM Team	Approver		

Department Approvers
Status: No records.

Approval Notes

Approval Notes

To click Require Changes the approver must first add to the Approval Notes. If the approver decides to require changes, the approval's Status is set to Requires Changes and the contract is set to Pending Contract Manager. All other approvals can still proceed if they've been launched; after the Contract Manager handles the required changes, the contract manager can determine whether the entire process needs to be relaunched.

Once all approvals have been approved, the contract's Status is set to Approved.

Emails Tab

The Emails tab shown below allows you to perform various email-related actions:

1. Emails can be sent to External Contacts, Internal Contacts or both. The list of external contacts is based on the contacts at the contracting company.
2. You can type the subject line and body into the Email Subject and Email Text fields.
3. Select the active attachments you want to include with the email.
4. The Send Email button sends the email. When someone replies to the email the Contract Manager and parties on the email are copied. Any documents contained in the reply will be put into the Attachments tab.
5. Email Communication History displays a list of all emails sent and received by this contract record.

Send Email

Recipient(s) Choose one ▾

Add email addresses separated by comma or semi-colon to cc people on the outbound email.

Emails to CC I

Include me in CC

Email Subject

Email Text

Select any files that you want to send with the email. Only active attachments will be available

Files to Send with Email

- Bid Tab - Material Testing 2-17-21.xlsx
- Bid Tab - Material Testing 2-17-21b.pdf
- CP783 - BSI email re SCI.pdf
- CP783 - BSI email re SCI.pdf
- CP783 - COI - City Design.pdf
- CP783 - COI - City Design.pdf
- CP783 - Exhibit A - City Design.pdf
- CP783 - Exhibit A - City Design.pdf
- CP783 - Geotech Proposal.pdf
- CP783 - Geotech Proposal.pdf
- Materials Testing Contract - City Design 2-22-21.doc
- Materials Testing Contract - City Design 2-22-21.pdf

Email Communication History

Inbound Email Content

[Daniel Kruep Mar 05 2021 13:51]

Thanks Shontel

Dan Kruep

Renewal / Related Contracts Tab

The Renewal/Related Contracts tab manages all related contracts to the current one, as well as contract renewals when the contract end date has expired.

Contract Renewals

When setting up contracts, you can choose the following renewal types:

- **Auto-renewing** – this will send a notification when the specified number of days before the contract expiration date arrives. If you do not cancel the renewal, it will automatically generate a copy of the contract with the specified monthly term of renewal.
- **Notify staff to renew** – this will send a notification when the specified number of days before the contract expiration date arrives. The contract owner should then log in and manually review and renew the contract.
- **Evergreen** – this contract has no expiry date and needs no renewal.
- **One-time contract** – this will not be renewed after the end date expires.

To create a contract renewal, in the Renewal / Related Contracts tab click the Create Renewal Contract button.

This will generate a copy of the contract record that you can review, change as necessary, and save. The two records will be linked and shown in the Previous Contract for which this is a Renewal section.

Previous Contract for which this is a Renewal			
Previous Contract Title	CP783 - Jesuit Residence - Material Testing Agreement - City Design Grp		
Previous Contract ID	8113	Previous Contract End Date	Mar 15 2022

Related Contracts

A single contract may generate multiple related contracts. These are related as parent-child subcontracts or amendments. Related contracts have the following restrictions:

- The contract Status must be Active, Canceled, Expired, or Signed.
- The related contract type must not be the same as the current contract. This is to enforce the parent/child relationships between contracts.

In the Renewal / Related Contracts tab, select a related contract type and click Create Related Contract.

Generate a Related Contract Record	
Choose one	Create Related Contract
Choose one	
Contract	
Subcontract	
Amendment	
Statement of Work	

A new contract opens, and you can add the details as necessary and send it through approvals. All related contracts will be shown in the Related Contracts and Amendments section.

Related Contracts and Amendments											
Diagram											
Status: 1 record(s) found, 1 page(s). Click here to count records again.											
Views											
Edit	ID	Status	Contract Title	Division	Department	Company Name	Contract Type	Contract Manager	Contract Effective Date	Contract End Date	Renewal Type
<input type="checkbox"/>	13802	Draft	Peter & Paul Community Services	S01 CPHSJ- Social Work	D006 Admin Social Work	Peter & Paul Community Services	Academic Affiliation Agreement	Contract manager Test	May 09 2022	May 08 2023	Notify staff to renew
Number of Related Contracts 1											

The Diagram field is a [Relationship Diagram](#) which allows you to view and navigate to any related contracts.



Canceling a Contract

If a contract is voided for any reason, you can set the Status to Canceled to avoid getting reminder emails about it. If no further action is required, you can also simply click the Cancel Contract button in the common area. This button is only visible once a contract has been saved.

Signature Tab

The Signature tab below manages all signatures required to process a contract through DocuSign electronic signature integration.

> Step 1: Add Signers
> Internal Signer Selected
> External Signer Selected
> Step 2: Prepare ESignature Files
> Step 3: DocuSign Envelopes
▼ DocuSign Recipients

1. You cannot send the contract for signature before the status is Approved, and other validation rules run to ensure that the contract request is ready for signature.
2. If the vendor does not accept DocuSign signatures and you must send the document manually for signature you can do so from the Emails tab and mark the contract as Pending Signature. If such a contract is Pending Signature, you can click the Mark as Signed button when the signed document comes back.
3. The Files to Sign field shows the document that will be sent via DocuSign.
4. Click Create DocuSign Envelope to generate a new envelope for signing the document. For more information on envelopes and the DocuSign e-signing process, see [Preparing for Signature](#).

Processing Contracts

When a contract requester submits a contract, it first routes through Contract Type and Compliance/Intake Question Approvals, after which it will go to the specified Contract Manager. (The choices of contract managers for each department are configured by the administrators of the system.)

You will need to act upon the contract in two scenarios:

1. At least one of the approvers requires changes, so the Contract's status is "Pending Contract Manager." You will receive an email notification that your action is required. The contract will appear in your My Assigned Contracts search and on your Home page in My Contracts in Progress:

SAINT LOUIS UNIVERSITY

Contract Management Home Page

Upcoming Contract Expirations

My Contracts in Progress

Status: 1 record(s) found, 1 page(s) Click for details...

Edit	ID	Division	Department	Company Name	Contract Title	Contract Type	Status	Contract End Date
<input type="checkbox"/>	663	E60 VP Student Development	D062 Career Services	zGoogle	Sample Sponsorship Agreement	Sponsorship Agreement	Pending Contract Manager	

- The approvers have all approved the request, and it's your turn to finalize everything before sending it to the Department Approver.

The following sections detail how to review the request and make required changes.

Handling Required Changes

When an approver has selected “requires change” on an approval, and the revised attachment has been uploaded and is time to send it back to the approver for review, to notify the approver to review again the contract manager must:

- open and edit the approval record that is in requires change status in edit mode (on the approvals tab of the contract)

Save Cancel Details Attachments Approvals Emails Renewal / Related Contracts Signature History <<>>

Edit	ID	Approval Title	Step Number	Approval Team	Department Approver Names	Status	Approver	Date Created	Date Approved
<input type="checkbox"/>	16736	Ascension Via Christi Hospital Manhattan - HDW (OGC Team)	1	OGC Team		Requires Change	Laura Frame	Dec 23 2020 07:16	Dec
<input type="checkbox"/>	16737	Ascension Via Christi Hospital Manhattan - HDW (Risk Management Team)	1	Risk Management		Approved	Stewart Wirth	Dec 23 2020 07:16	Dec

- add notes in the approval notes section indicating what was done to satisfy the changes requested
- click the “resend for approval” button which sets the approval status back to pending and in the approver’s queue rather than the contract manager’s

Approval: Ascension via Christus Hospital (Mammalian - HDW) (OGC Team)

Save Cancel Details Related Approvals Emails History << >>

Step number 1

Approval Team OGC Team Approver Laura Frame

Department Approvers
Status: No records.

Approval Notes

Insert Attorney / Client Privilege Resend for Approval

Approval Notes

Review the Request – Contract Manager Approval Step

Once the initial approvals have been approved, the Contract Manager step will be Pending Approval. You will be notified via email, and will find the contract in My Assigned Pending Approvals:

Contracts: My Assigned Pending Approvals

Status: 1 record(s) found, 1 page(s) (Search: Status='Pending Approval' and related Approvals match the saved search 'My Assigned Pending Approvals':((Approver='Kimberly Reitter' or Approval Team<='Contract Management Team,Contract Owner Team,Contract Creator Team' and Approver=NULL or Department Approver Logins=='reitterk' or Contract Manager Login=='reitterk' and Assign To Value='Contract Manager') and Status='Pending Approval')). Click here to recount records..

New Actions Views Search

Edit	ID	Division	Department	Company Name	Contract Title	Contract Type	Status	Contract End Date
	663	E60 VP Student Development	D062 Career Services	zGoogle	Sample Sponsorship Agreement	Sponsorship Agreement	Pending Approval	

1. Click the Edit icon to open the request.
2. Check each section on the Details tab for accuracy.
3. Check the Contracting Party information. If it's for a new company, ensure that company doesn't already exist in the system, and click "Create Company" if not done by the Requester.
4. Go to the Attachments tab. Click the name of the contract document and choose Edit and Checkout. Compare the contract document to the responses on the Compliance Intake questions.
5. If any responses there are inaccurate, fix the responses and create any additional approvals that are needed.
6. If you find any changes are needed in the contract document, ensure track changes is on, and make the changes.
7. Use the email tab to communicate with the 3rd party, attaching the contract document(s) as required.

Sending on to Department Approvers

Once you have completed the steps to review the contract request, you're ready to move the request forward to the Department Approver(s).

1. Click the Approvals tab.
2. Click the Edit icon to open the Contract Manager approval step, and click Approve:

974 Sample Sponsorship Agreement - Contract Manager 2 Pending Approval Kimberly Reitter Sep 22 2018 11:28

Approval

Save Cancel Details Related Approvals Emails History << >> Print

Collapse All

ID 974 Status Pending Approval

Approval Title Sample Sponsorship Agreement - Contract Manager

Approve Require Changes

Contract Managers List Status: 1 record(s) found, 1 page(s). Click [here](#) to recount records.

Edit	ID ↓	Division Name	Department Name	Intake Person	Contract Manager	Department Code
<input type="checkbox"/>				LaDonna Utley	Kimberly Reitter	

In the Approvals Needed related table, you'll now see that the Department Approver step has shifted to "Pending Approval," and the Department Approver(s) notified via email.

The Department Approver(s) will review the request just as the initial Contract Type and Compliance Approvers did, and you can resolve in the same way.

Preparing for Signature

When the Department Approver(s) and any Ad Hoc approvals you may have created are all Approved, you will receive an email notification and the Contract Status will be Approved:

Contracts: My Assigned Contracts

Status: 1 record(s) found, 1 page(s) [Click for details...](#)

New Actions Views Search Print

Edit	ID ↓	Division	Department	Company Name	Contract Title	Contract Type	Status	Contract End Date
<input type="checkbox"/>		663	E60 VP Student Development	D062 Career Services	zGoogle	Sample Sponsorship Agreement	Sponsorship Agreement	Approved

Subject	Content	Attachments	Created On
Contract for zGoogle has been approved	<p>The Contract for Sponsorship Agreement described in more detail below has just been approved.</p> <p>Click here to view the record directly.</p> <p>ID: 663 Status: Approved Contract Title: Sample Sponsorship Agreement Description: Sample Sponsorship Agreement Renewal Type: One time contract ...</p>		Sep 22 2018 13:04

At this point, you're ready to route the contract for signature.

The document must be signed by any users listed in the Internal Signers and Counterparty Signers sections of the Details tab. The internal list will eventually be automatically populated based on a number of factors, including the Business Unit, Division/School and Department selected, as well as the dollar amount of the contract and type of contract.

For this first phase, you must specify all signers.

1. Click the Signature tab. Add as many signers as you need using the Add Signer form. You may use the magnifying glass lookup to find users already stored in the People table, or you can manually type in their Name, Title, and email address. Send Order controls the order in which DocuSign routes the envelope for signature. Each signer must have a different role name. Ensure SLU signers are noted with an InternalSigner role name, and 3rd party signers are Customer role names. Click Add Signer.

2. Signers you add will appear in related tables of Internal Signers and Counterparty Signers:

Internal Signers					
Status: 1 record(s) found, 1 page(s). Click here to recount records.					
New Mass Edit Delete Unlink Actions Views Search Print Refresh Help					
Send Order	Role Name	Full Name	Title	Email	
1	InternalSigner1	Agiloft Implementer	Implementer	careytestagiloft+sluadmin@gmail.com	

Counterparty Signers					
Status: 1 record(s) found, 1 page(s). Click here to recount records.					
New Mass Edit Delete Unlink Actions Views Search Print Refresh Help					
Send Order	Role Name	Full Name	Title	Email	
2	Customer1	External Reviewer	The Reviewer	careytestagiloft+sluexternalreviewer@gmail.com	

3. Now it's time to prepare the Contract document itself. Click the blue hyperlinked Attached File and choose Edit and Checkout. This will save your changes directly to the Word file on the server:

Prepare ESignature Files



INSTRUCTIONS







All active attachments are shown below. Remember:

1. Work through any [tracked changes](#) that might exist for the document, accepting or rejecting them, and then turn off track cha
2. If you need to [merge a signature block](#) for SLU templates, select the checkbox next to the contract, and choose "Merge Signat
3. Ensure that any files that you need to be included in the DS Envelope are marked "Include in DS Envelope."

Status: 1 record(s) found, 1 page(s). Click [here](#) to recount records.

New | Select Files ▼ | Mass Edit | Save Changes | Cancel Changes

Views ▼ | Search ▼ |  ▼ |  ▼

<input type="checkbox"/>	Edit	ID	Attachment Type 	Attached File	Include in Approval Packet 	Include in DocuSign Envelope 	Status 
<input type="checkbox"/>		429	Document Provided by Outside Party	 Sample Contract.docx	Yes	No	Active

Sample Contract.docx

Download/Save **View File** **Edit and Checkout**

4. Work through any tracked changes in the document and turn off tracked changes. If it's a SLU template, you will need to Unlock Track Changes by going to Review > Track Changes > Lock Tracking, and enter the password "slu" (all lowercase). Accept or reject changes; accept them all and stop tracking by choosing Accept > Accept all changes and stop tracking. Save the Word file and close. If you're using a SLU template for the SSA or the Affiliation Agreements, you will need to merge the signature block. Click the box to the left of the contract document to be signed, hover over Select Files, and choose Merge Signature Block:

Prepare ESignature Files

INSTRUCTIONS

All active attachments are shown below. Remember:

1. Work through any [tracked changes](#) that might exist for the
2. If you need to [merge a signature block](#) for SLU templates
3. Ensure that any files that you need to be included in the

Status: 5 record(s) found, 1 page(s). [Click here](#) to recount

New | Select Files ▼ | Mass Edit | Save Changes | Can

Edit
 Merge Signature Block
 Add to Approval Packet
 Remove from Approval Packet
 Add to E-sign Packet
 Remove from E-Sign Packet
 Set Status to Superseded

5. This will create a new attachment record of the contract, now with a signature block included. It will automatically be marked to be included in the DocuSign Envelope:

<input type="checkbox"/> Edit	ID	Attachment Type	Attached File	Include in Approval Packet	Include in DocuSign Envelope	Status
<input type="checkbox"/>	423	Generated Agreement from Template	422-zGoogle-SSA-Sep 18 2018-with_signature_block.docx	Yes	Yes	Active

6. Adjust any other attachment records as necessary using the Quick Edit field "Include in DocuSign Envelope." Any file that you want to be included in the envelope must be set to Yes. Once you've done that and saved each entry, click Refresh Files to show the Files that will be included in the envelope:

Files to Sign 422-zGoogle-SSA-Sep 18 2018-with_signature_block.docx

[Refresh Files](#)

7. Click Create DocuSign Envelope:

DocuSign Envelopes

[Create DocuSign Envelope](#)

DocuSign Envelopes

8. The DocuSign Envelope form will display, showing the Internal and External Signers you entered as DocuSign Recipients, along with the file(s) that will be included in the envelope. Click Create and

Preview:

DocuSign Envelope

Save Cancel Envelope Status <> 🖨️ 🏠

Create & Preview Send Discard

Envelope Status Draft

Linked Record contract/621 Sender Agiloft Implementer

*Subject Test - SSA for D004

Attached Documents Attach/Manage

1. 409-zGoogle-SSA-Sep 17 2018-with_signature_block.docx

Recipients Status: 3 record(s) found, 1 page(s). Click here to recount records.

New Mass Edit Delete Views Search

<input type="checkbox"/>	Edit	ID ↓	Send Order	Status	Full Name	Email	Title	Role Name	Message	Envelope
<input type="checkbox"/>		326	3	Draft	External Reviewer	careytestagiloft+sluexternalreviewer@gmail.com	The Reviewer	Customer1		
<input type="checkbox"/>		325	2	Draft	Cari Wickliffe	careytestagiloft+wicklics@gmail.com		InternalSigner2		
<input type="checkbox"/>		324	1	Draft	Agiloft Implementer	careytestagiloft+docusigndev@gmail.com	Implementer	InternalSigner1	Please sign this document.	

Signed Documents

Save Cancel <>

9. You will be taken to the DocuSign Interface, where you can see the contract document and drag in tags as necessary. Use the controls on the left to drag in additional tags; if you're using SLU templates, most tags will be in place already for you.

Test - SSA for D004

Agiloft Implementer

Standard Fields

- Signature
- Initial
- Stamp
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio
- Payment Item
- Formula
- Attachment
- Note
- Approve

Signature:

Name: Agiloft Implementer

Title: Implementer

Date:

Signature:

Name: Cari Wickliffe

Title:

Date:

Signature:

Name: External Reviewer

Title: The Reviewer

Date:

Documents

409-zGoogle-SSA...
Pages: 6

ACTIONS SEND

10. When you're ready, click Send.

Status Changes

DocuSign will handle emailing all of the recipients and will notify you as well when signed. DocuSign will also send status updates to Agiloft so that from within the CMS you can see where the envelope is in the process.

When an envelope is sent the contract status will change to Pending Signature.

The recipients will get an email notification from DocuSign that the documents need to be signed off by them, and they can click the link in their email to access and sign the document.

When the document is fully signed it will be added to the Attachments tab, the status will change to Signed or Active. If the contract is set to become active on date of last signature, the contract start date will be set automatically when the signed document comes back from DocuSign and become Active. Otherwise, once the contract reaches its start date the status will change to Active.

BAA Process

Execution of Business Associate Agreements (BAA) shall occur through the University's centralized electronic contracts management system utilizing the University's template BAA. Vendor provided agreements may only be accepted after consideration of SLU's template agreement. The University Privacy Officer must approve any third-party BAA.

How to submit a BAA

To generate a BAA on our SLU approved template, complete the following steps:

Initiate a new contract submission in Agiloft. Choose the following options in the menu to route the BAA request through University Administration > E11 VP of Compliance/BAA.

Fill in intake details as usual, making sure to list the contact's name and email for the other party so the compliance office may follow up for approvals and e-signature.

In the attachments section at the bottom of the details tab, ensure the selection is on the defaults for generating the BAA template. Unless consent is given by Compliance to use the other party's BAA form (in rare cases), no documents are uploaded in this section.

4. For the final step, click the submit for review button and the BAA will be generated by the system and the record will be saved and closed out. The document will then advance for the final steps which are to be completed by Compliance, including approvals and e-signature through DocuSign.

****NOTE: BAAs should not be submitted as an exhibit to the service agreement, please ask the vendor to remove it and we will present them with a SLU BAA.**

Additional Resources

Several tutorial videos located at the vendor's website at <http://www.agiloft.com/tutorials.htm> demonstrate how to set up saved searches, charts and reports, manage the table views, and do other day-to-day work with the system. We highly recommend watching a few of these videos to learn how to navigate the system most efficiently.