

Approving in Contracts+ – Contract Approver

Approving a Contract Request

Once a contract request form has been submitted by a Contract Requestor in a department, the contract request form may require several approvals depending on the metadata entered on the form.

A Contract Approver must review and take action on the pending Contract Request Form in the approval queue they are assigned to. The Contract Request Form must be approved before contracts can be created from it.

Contract Request Form Approval Queues:

- Specialty Queues
 - GASB87 UAFR Contract Request Form Approval for Equipment
 - Materials Management
 - Chief Medical Officer
- Department Level
 - Unit Head Approval Queues are Chart-Org Specific
 - Chart 2 = All Contract Request Forms submitted for a Chart-Org regardless of dollar amount.
 - Dean/Director Approval: Queues are Chart-Org Specific
 - Chart 2 = All Contract Request Forms submitted for a Chart-Org equal to or greater than \$100,000.
 - Chancellor/Vice Chancellor Approval: Queues are College Code Specific
 - Chart 2 = All Contract Request Forms submitted for a Chart-Org equal to or greater than \$200,000.

Step-by-Step

1. Navigate to **Contracts > Approvals > Contract Requests to Approve**.
2. Click the **contract request name** or **form number** to open the request.
3. [Recommended] To prevent another approver within the approval queue from approving the contract request form at the same time, select the checkbox next to the item you are approving and select **Assign to Myself** from the dropdown menu in the top right corner of the table, then click **Go**.
4. Click the **Form Number** or **Name** to open.
5. Review the field(s) pertaining to the specialty processes you are responsible for within the Contract Request Form.
6. [Optional] During the approval process the **Discussion** page allows the approver to request more information from the contract requester through discussion threads. See the **How to use the Discussion Thread on a Contract Request** section below.

7. Click the **Form Request Actions** and select the appropriate action from the drop-down menu, to view Actions, including **Approve, Reject, Put on Hold, and Return to Requester**.
8. Click **Approve** if you are ready to move the CRF to the next steps.

Form Request Actions Menu

- **Assign to Myself:** Assigns the contract to you to prevent another approver from approving the contract at the same time.
- **Approve/Complete:** Moves the contract request form to send it to the next step in the workflow.
- **Forward To:** Allows you to forward a contract request form to another user to review. *The user must be assigned the appropriate role to perform any actions. Advised to use Internal Review or Communication Center to request additional review.
- **Put Request on Hold:** Used to indicate that the assigned approver is reviewing/obtaining additional information/not taking action on the contract request form at this time.
- **Reject:** Allows users to reject the contract request form.
- **Return to Requestor:** Allows users to return the contract request form to the Contract Requestor to make updates and resubmit.
- **Return to Shared Folder:** Used to return the contract request form to its shared approval folder where another approver within the queue can review it. This option is only available if you have assigned the contract to yourself.

Approving a Contract

After a contract request form has been approved, the Contract Office will create the associated contract. Once the contract has been prepared, it may require several approvals depending on the metadata entered.

A Contract Approver must review and take action on the pending Contract Request Form in the approval queue they are assigned to.

Contract Approval Queues:

- Specialty Queues
 - GASB87 UAFR Contract Approval for Real Estate Lease or Real Estate License
- Department Level
 - Unit Head Approval Queues are Chart-Org Specific
 - Chart 2 = All Contracts submitted for a Chart-Org regardless of dollar amount.
 - Chart 1, 4 & 9 = All Contracts submitted for a Chart-Org regardless of dollar amount.
 - Dean/Director Approval: Queues are Chart-Org Specific
 - Chart 1, & 9 = All Contracts submitted for a Chart-Org equal to or greater than \$100,000.
 - Chart 4 = All contracts submitted for a Chart-Org equal to or greater than \$25,000.
 - Chancellor/Vice Chancellor Approval: Queues are College Code Specific
 - Chart 1, & 9 = All Contracts submitted for a Chart-Org equal to or greater than \$200,000.
 - Chart 4 = All Contracts submitted for a Chart-Org equal to or greater than \$50,000.
- University Level
 - Chief Legal Approval Queues are Chart specific
 - All Contacts submitted for a Chart in which the Fiscal Year Spend is \$250,000-999,999 or \$1,000,000 or more.
 - President Approval Queues are Chart specific
 - All Contacts submitted for a Chart in which the Fiscal Year Spend is \$250,000-999,999 or \$1,000,000 or more.

Step-by-Step

1. Navigate to **Contracts > Approvals > Contracts to Approve**.
2. [Recommended] To prevent another approver within the approval queue from approving the contract at the same time, select the checkbox next to the item you are approving and select **Assign to Myself** from the dropdown menu in the top right corner of the table. Then click **Go**.
3. Click the **Contract Number** to open.
4. Review the contract.

5. [Optional] During the approval process, the Communication Center allows the approver to request more information from the Contract Administrator or respond to a question/comment entered by the Contract Administrator. See the *How to Use the Contract Communication Center* section below.
6. Click **Contract Actions** and from the dropdown menu and select the appropriate action.

Contract Actions Menu

- **Assign to Myself:** Assigns the contract to you to prevent another approver from approving the contract at the same time.
- **Approve/Complete:** Moves the contract to send it to the next step in the workflow.
- **Reject:** Allows users to reject the contract.
- **Return to Draft:** Allows users to return the contract to the Contract Office to make updates and resubmit.
- **Return to Shared Folder:** Used to return the contract to its shared approval folder where another approver within the queue can review it. This option is only available if you have assigned the contract to yourself.

How to Use the Discussion Thread on a Contract Request

As a Contract Approver, you may initiate an in-system discussion with the Contract Requestor or you may receive a Discussion thread system notification that you would like to reply to.

Start a Discussion Thread

1. Navigate to **Contracts > Approvals > Contract Requests to Approve > My Form Request Approvals**.
2. Click the **Form Number** or **Name** to open the contract request form you would like to work on.
3. In the left menu, select **Discussion**. The **Discussion** page opens.
4. Click the **Start New Thread** button to begin a discussion thread on a contract request.
5. Enter a title for the contract request message in the **Subject** field.
 - a. **NOTE:** If there is more than one discussion on a contract request, the **Subject** line for each message is displayed under the **Topics** heading.
6. Enter the text of the contract request message in the **Message** field.
7. [Optional] Click the **Add Attachments** button to add files or links to the contract request message.
8. Click **Post Message** to display a message on the **Discussion** page.
9. Click the **Edit** button to change the text of a contract request message or reply.

Reply to a Discussion Thread

1. Navigate to **Contracts > Approvals > Contract Requests to Approve > My Form Request Approvals**.
2. Click the **Form Number** or **Name** to open the contract request form you would like to work on.
3. In the left menu, select **Discussion**. The **Discussion** page opens.
4. Click the **Reply To This Thread** button on a contract request message to add a reply to it.
5. Enter the text of the contract request message in the **Message** field.
6. Click **Post Message**.

How to Use the Contract Communication Center

The **Communication Center** of a contract is used to manage correspondence about a contract from one central location in Contracts+.

Add Internal Message Step-by-Step

The **Add Internal Message** contract action is used to send communications from a contract. It is displayed on all contract pages of contracts in any status. The messages and their replies are saved and can be accessed from the contract's Communication Center.

1. Navigate to **Contracts > Contracts > Search Contracts**.
2. Open the contract you want to send an email from.
3. In the top right corner of the page, click **Contract Actions** and select **Add Internal Message**. The Internal Communication window opens.
4. Enter a line describing the message in the **Subject** field.
5. Type the message text in the **Body** field.
 - a. **NOTE:** You can use formatting options to modify the appearance of the text and add links and placeholders.
6. Enter the user names of any desired recipients in the **Recipients** field.
7. [Optional] In the **Attachments** section, upload an attachment from a local drive on your computer by clicking the **Add Attachments** button. Select the files you want to attach and click **Done**.
8. Click the **Create** button.
 - a. **NOTE:** The message is sent to recipient(s) and the conversation is added the Communication Center page.

View a Conversation Step-by-Step

The **Communication Center** of a contract is used to monitor correspondence about a contract from one central location in Contracts+.

- **Communication Center** – Clicking **Communication Center** in the left menu of a contract opens a page with tabs for internal and external communications. The lists on these pages include all the internal and external communications that have been sent via the Add Internal Message and Start External Communication contract actions. Columns show when the conversation started, the number of messages (responses) in the conversation and the last update.
- **Conversation Details** – Clicking on a conversation row opens a second page that shows the original communication and all replies, the recipients, and any attachments included.

1. Navigate to **Contracts > Contracts > Search Contracts**.
2. Open the contract with the email conversation you want to view.
3. Click **Communication Center** in the left menu. The Communications Center main page opens.
4. Search for the conversation you want to view. Columns show when a conversation started, the number of messages (responses) in the conversation and the last update.
5. To view all messages in a conversation, click anywhere in the row of the communication you want to view. The Conversation Details page opens. It shows the original communication text and all replies, the recipients (subscribers) and their email addresses, and any attachments included in the communication. In the **Subscribers** section, active subscribers are displayed in blue text, and those who have unsubscribed are displayed in gray text.
6. (optional) In the **Conversation Details** page, you can:
 - a. Click on a name to view the email address of a recipient.
 - b. Click the **Change Subscribers** button to add, edit or remove subscribers (recipients) in a conversation. See Manage Email Subscribers, below.
 - c. Click the **Add to Conversation** button to send a reply to all recipients in the conversation.
 - d. Click the **Actions > Compare With** option next to each reply that has an attachment. It allows you to compare attachments received via email to the latest version of contract documents in the **Attachments** page.