Internal Review Rounds for Contract Administrator

The Internal Review Rounds feature allows Contract Administrators to send a contract through multiple rounds of review by internal departments such as Legal, BOT, Risk Management, HR. Single or multiple reviewers can be selected for each review round. The reviewers must have a role within the Jaggaer system, so the Internal Reviewer role has been created for those individuals.

Review rounds occur while the contract is in Draft status and initiated by a Contract Administrator. Each time a contract is submitted for review it is considered one review round. If there are multiple reviewers, the review round is considered complete when the last reviewer is done.

Start a Manual Internal Review Round

The Manual Internal Review Round feature allows Contract Administrators to send a contract to selected internal users for review before it is approved. Contract Administrators need to create a manual review round and assign reviewers each time they send a contract for review.

1. Search for and open the contract you want reviewed.
2. In the left menu, select Review Rounds.
3. Click Create Manual Internal Round.
4. Click Add Reviewer. The User Search window opens.
5. Search for and select the internal users who you want to review the contract.
6. Click Save Changes. The selected reviewers are displayed with the status "Not Sent" under the subheading Next Round (Internal - Manual).
7. Click Begin Round. The Begin Internal Review window opens and shows who has been selected for review.
8. Enter a note in the Message to Reviewers field regarding the review round or leave the field blank. The note is visible to all reviewers on the round.
9. Click the Begin Internal Review button to send the contract out for review. A status of "Sent" appears next to the internal reviewers on the Review Rounds page. Reviewers will receive a notification or an email indicating that there is a contract to review.
   a. While the contract is out for review, you can view details about the round under the Current Round (Internal - Manual) subheading on the Review Rounds page. As each reviewer completes their review, the status Done is displayed next to their name on the review round.
10. [Optional] Once a review round has started, you can change the message, skip a reviewer, or end the round early:
   a. Click Edit in the Message From: field to modify a message while the review round is active. Changes are immediately visible to all reviewers and anyone who can access the page. Changes are saved in the History.
b. Click Actions > Skip Reviewer to move the review round to the next reviewer on the list. A status of "Skipped" will appear next to the current reviewer's name.

c. Click End Round Now to end the review round early and skip any reviewers who are not done. The Tracking column will display "Skipped" on manual or external review rounds.

Once all reviewers have responded, the review round will close, and the contract will return to Draft status. The Contract Administrator will receive a notification that the review is complete. Any changes that reviewers made to contract header fields can be viewed in the History page.