Contents

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, icons 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 b

TheAgiloft FAQ’s

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.

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 hyperlinkedm(p)-/w 3 [(m(p)-/w

1.Cter5ooeoiolic31.7 (o)-3.n (5)-3.15 (61.7 (o)-3.u s[(C)41.3 (e)0.3 (e)0.7t (o)-1.h3 (e)0.7(r)-5.")26melic31.7 (o

The Table View

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

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.

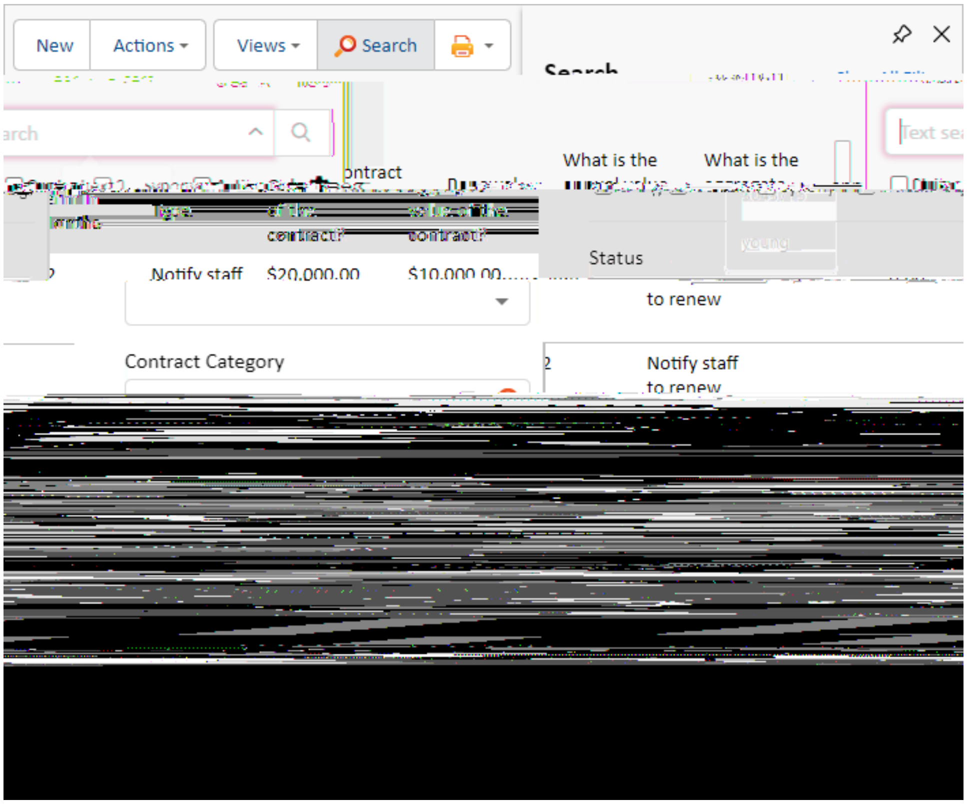
Sorting Records in a View

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.

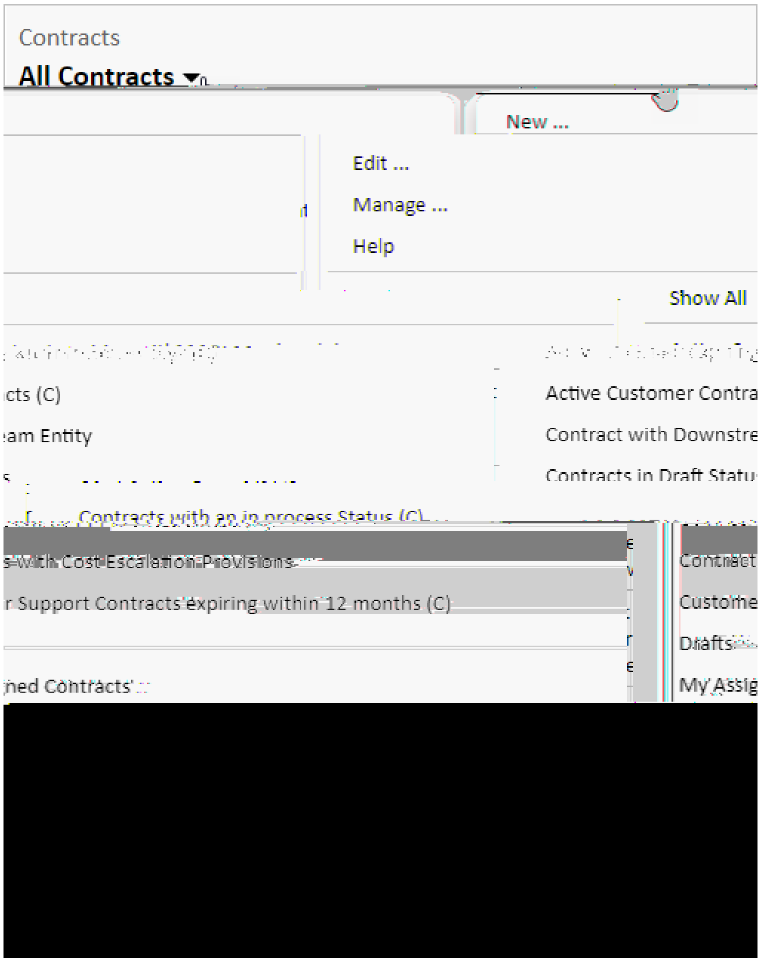
Searching in Tables

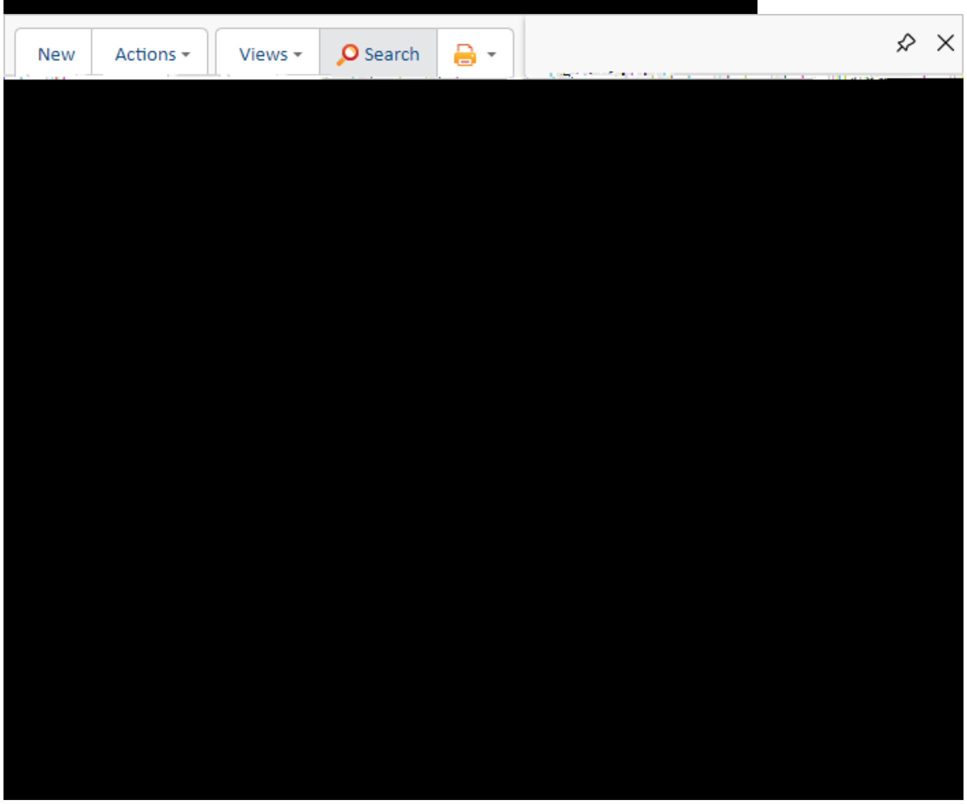
To search for a record in Agiloft, use the search button at the top of the table you want to search:

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



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


Contracts
All Contracts
New ...
Edit ...
Manage ...
Help
Show All

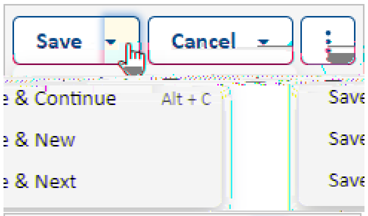

New
Actions
Views
Search

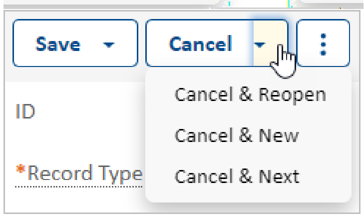
For more information, see Import Export.

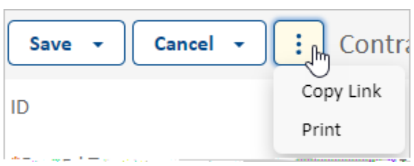
- Views – see

Cancel buttons. 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, 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.





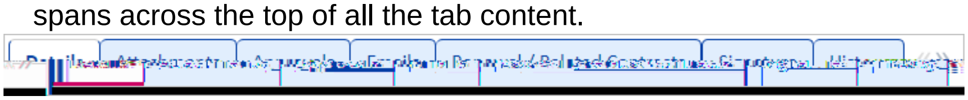


Using the Record Form

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.

Required Fields

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

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.

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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

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 st edsdit anr re-ul(t)0.6oade .7 16 -32.355 -1

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 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 itself, 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.

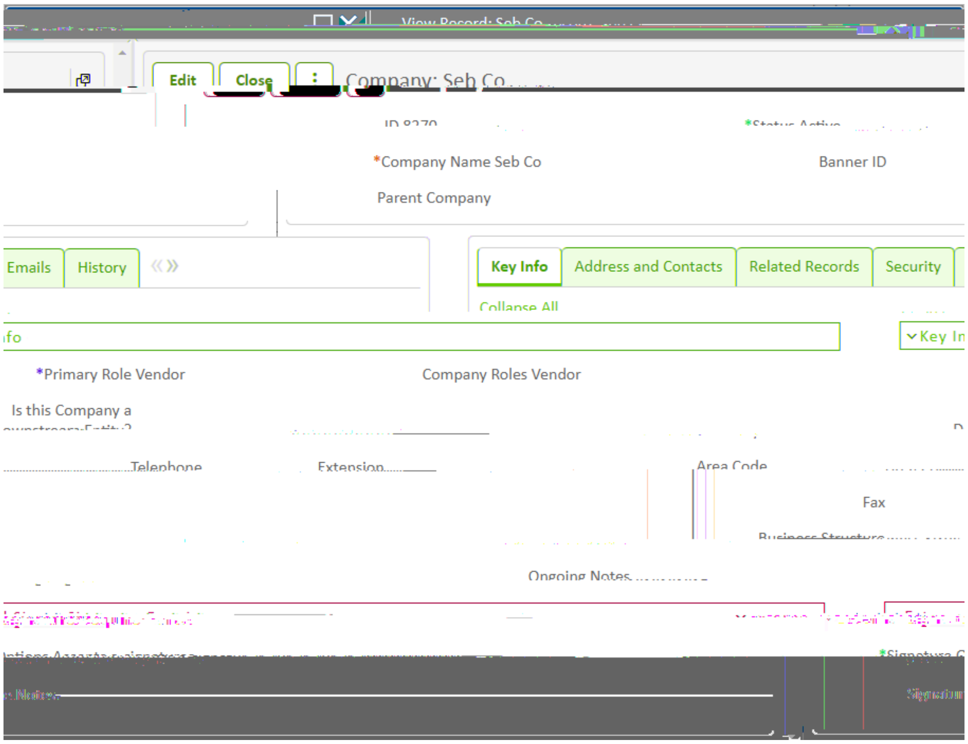
Once you've established that the company record doesn't already exist and the new company information is valid, the new company will be created when your contract is Submitted.

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



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

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.

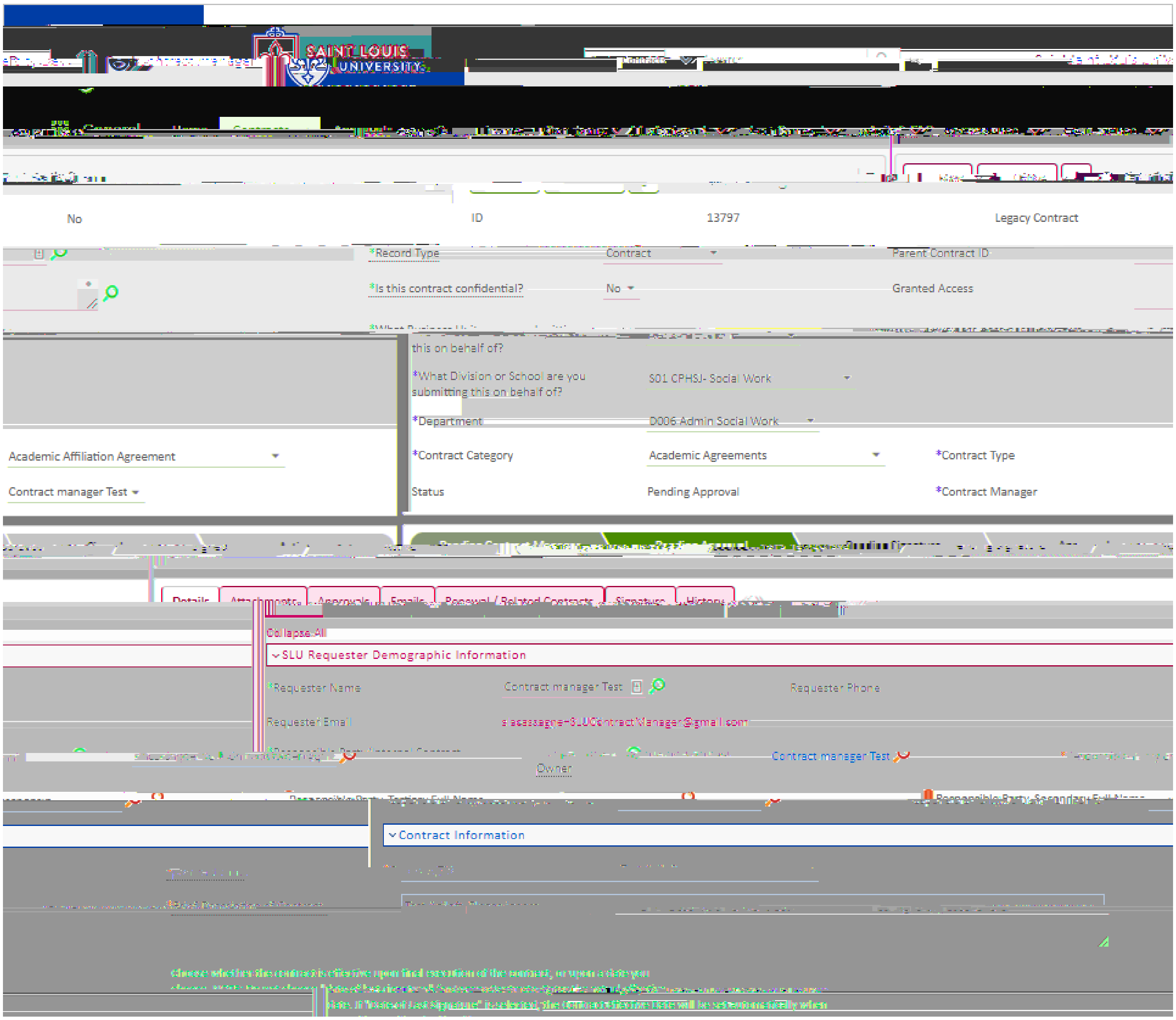
Saved Searches

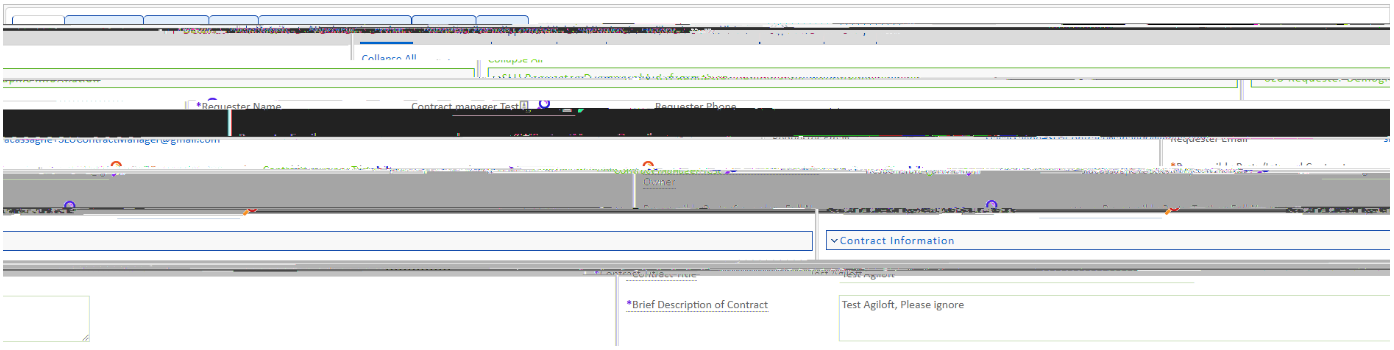
There are many saved searches pinned under the main Contracts table in your navigation bar, which

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:




Contract Information
*Brief Description of Contract
Test Agiloft, Please ignore

DetailsTab

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.

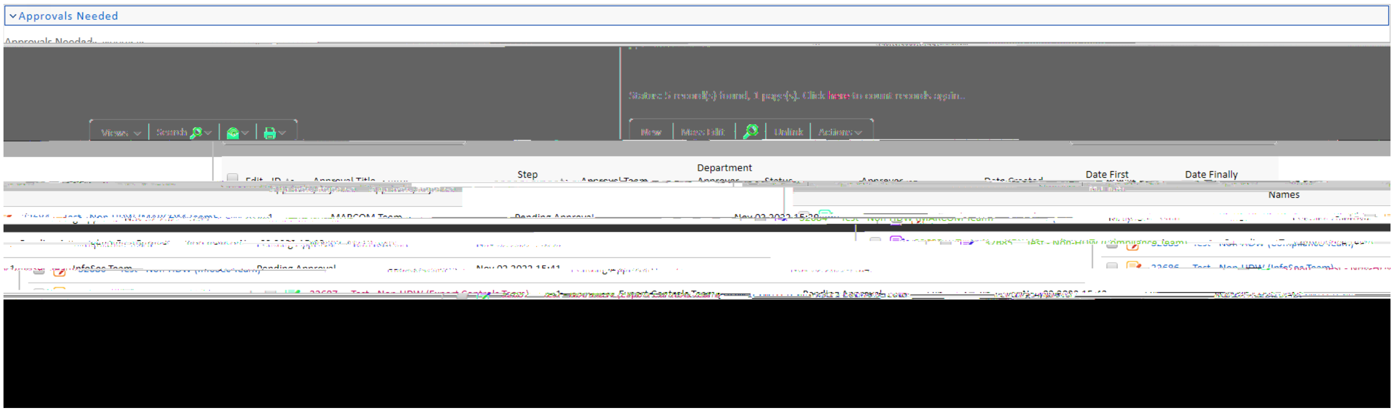
Special Fields for Contract Manager

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.

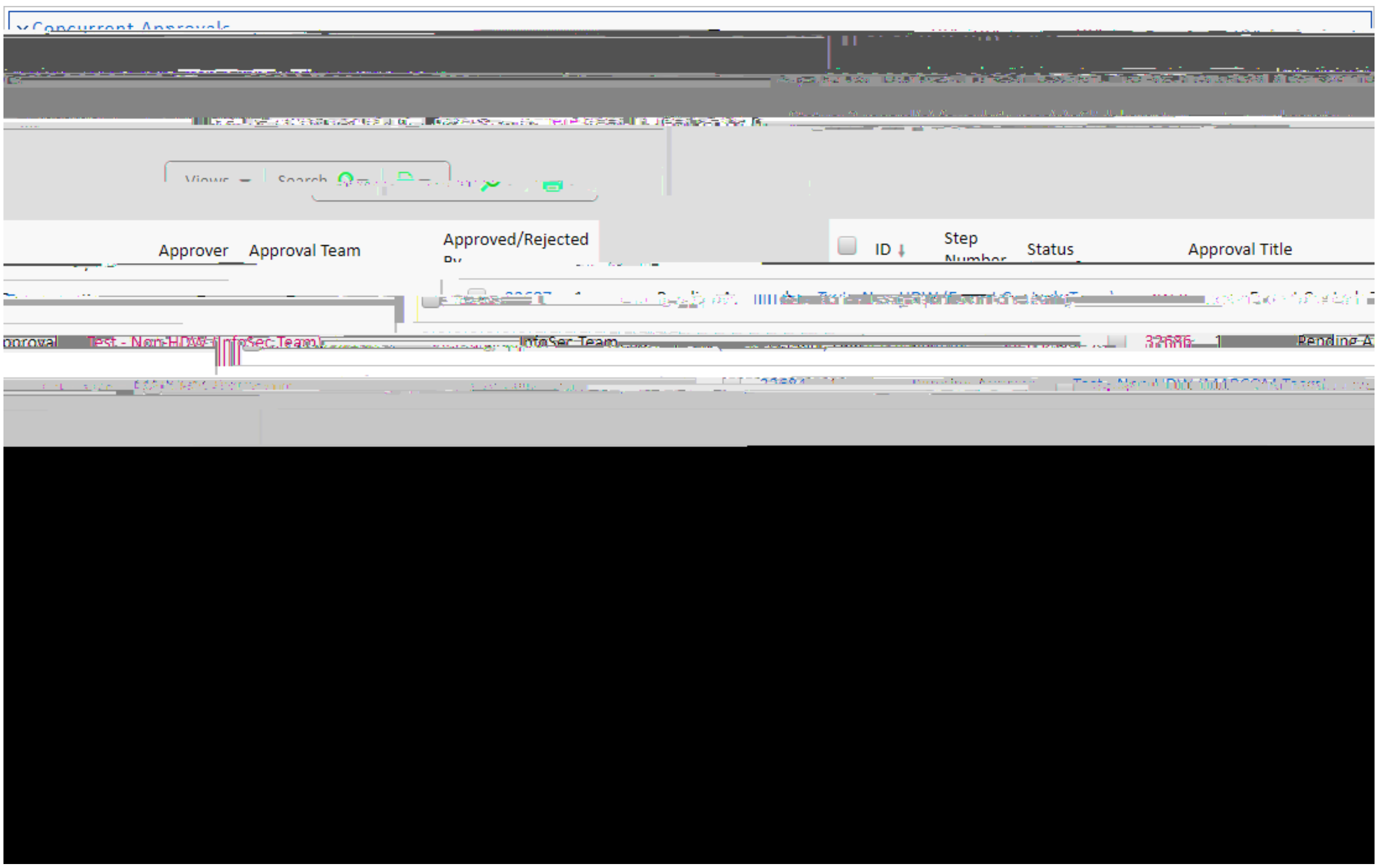
Attachments Tab

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.

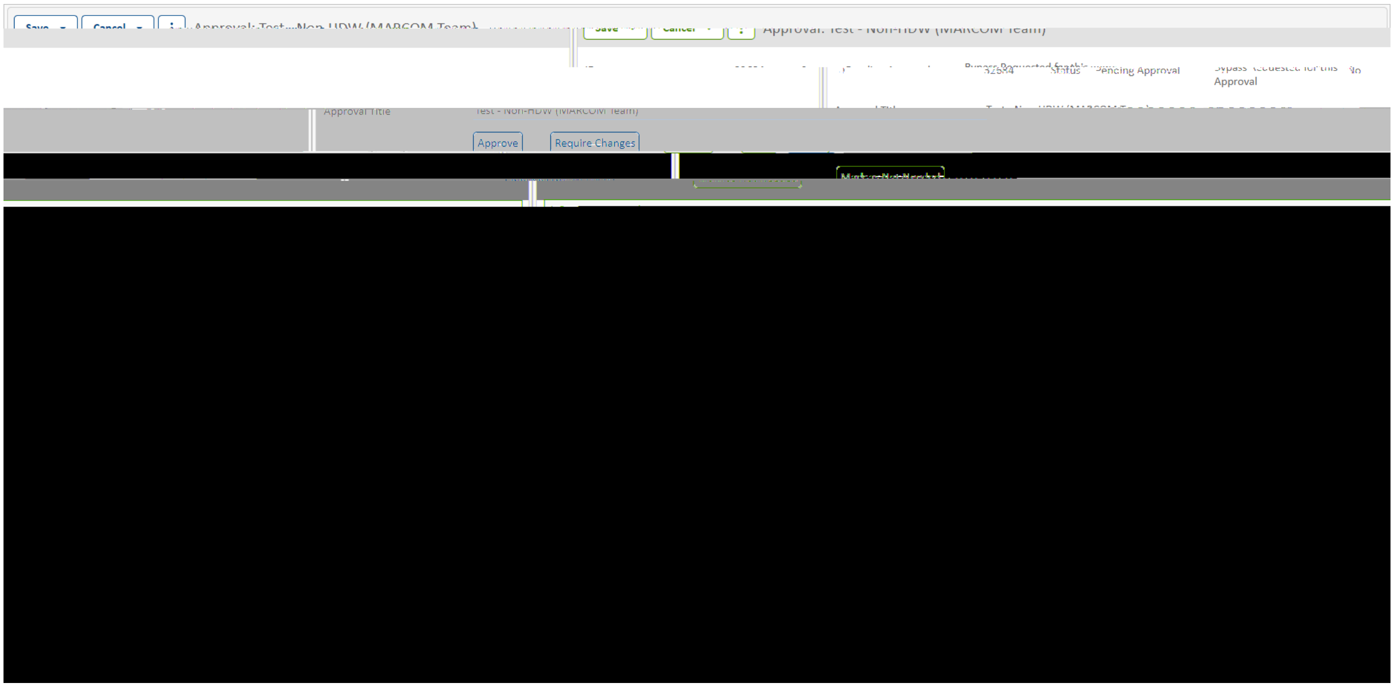


If necessary, the Contract Manager or an Approver can generate additional approvals on an adhoc basis. The approvals can be seen in the related table of Approvals Needed, shown below

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.



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



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.

Renewal / Related Contracts Tab

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.

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.

The Diagram field is a Relationship Diagram which allows you to view and navigate to any related contracts.

Canceling a Contract

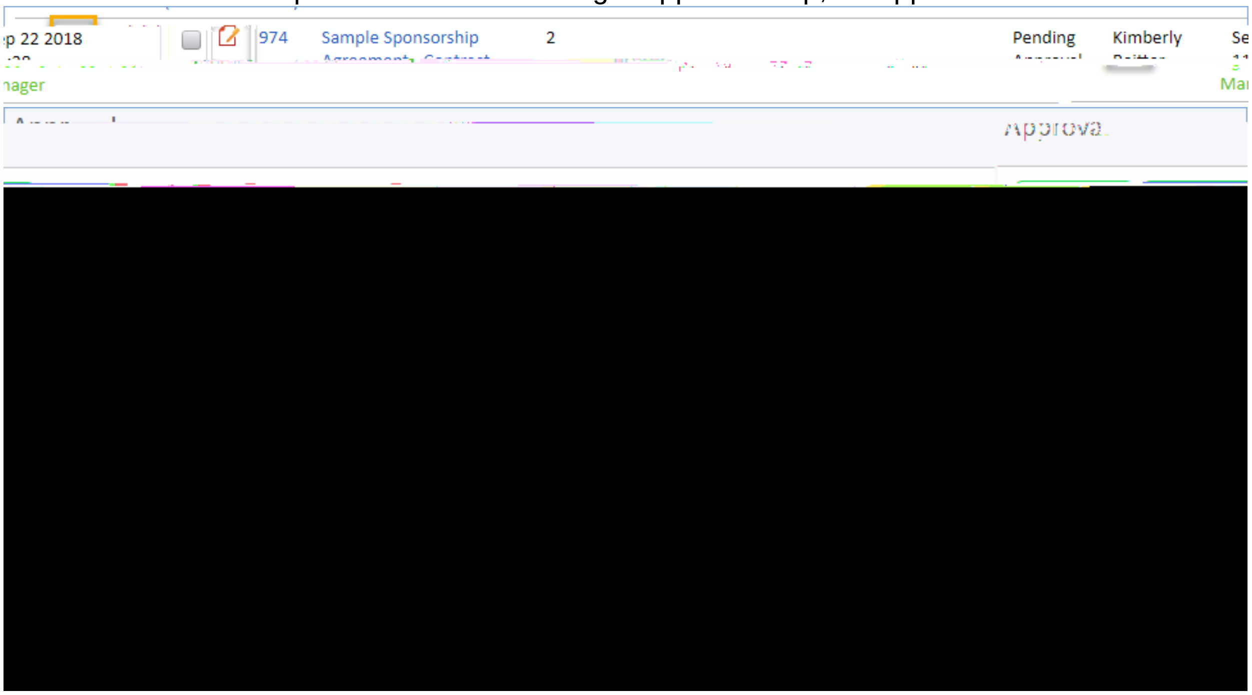
If a contract is voided for any reason, you can set the Status to Canceled to avoid getting reminder emails about it. If no further action is required, you can also simplo c t r.1 (na6 (o)-5.1

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

Review the Request – Contract Manager Approval Step

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:

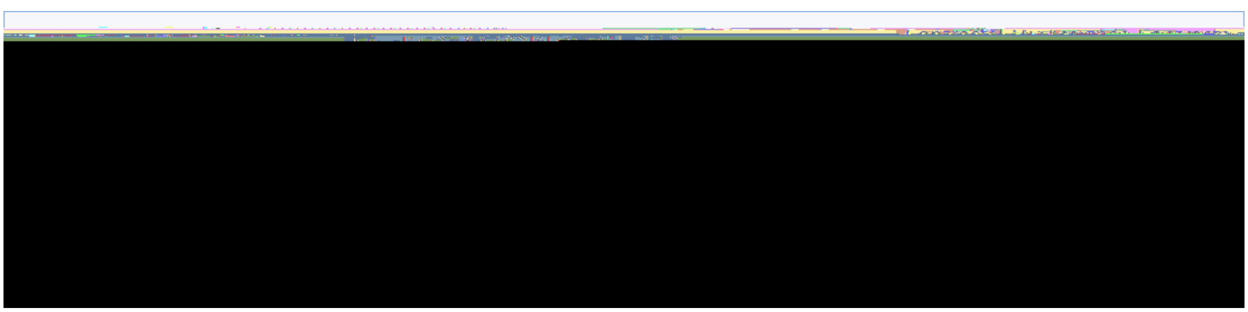


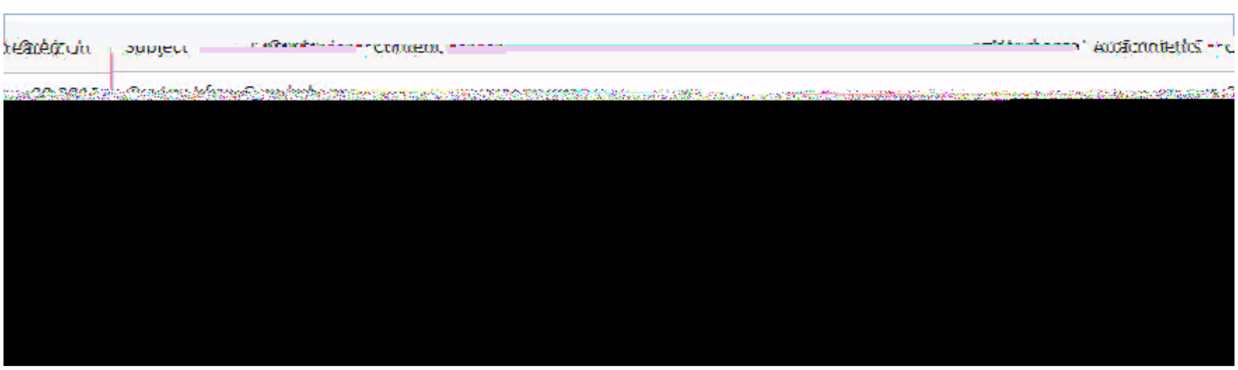
In the Approvals Needed related table, you'll now see that the Department Approver step has shifted to "Pending Approval," and the Department Approver(s) notified via email.

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:



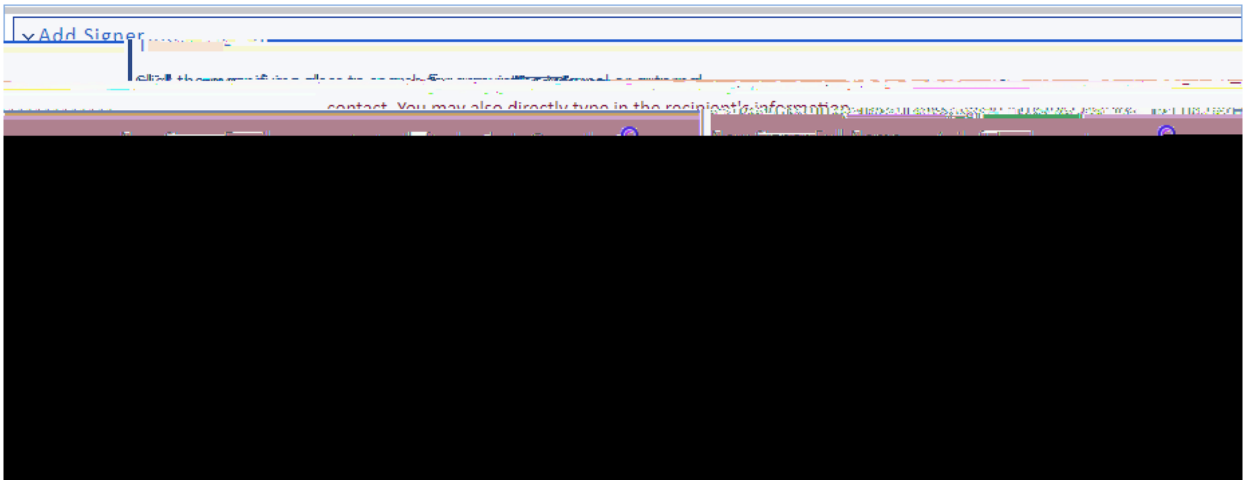


At this point, you're ready to route the contract for signature.

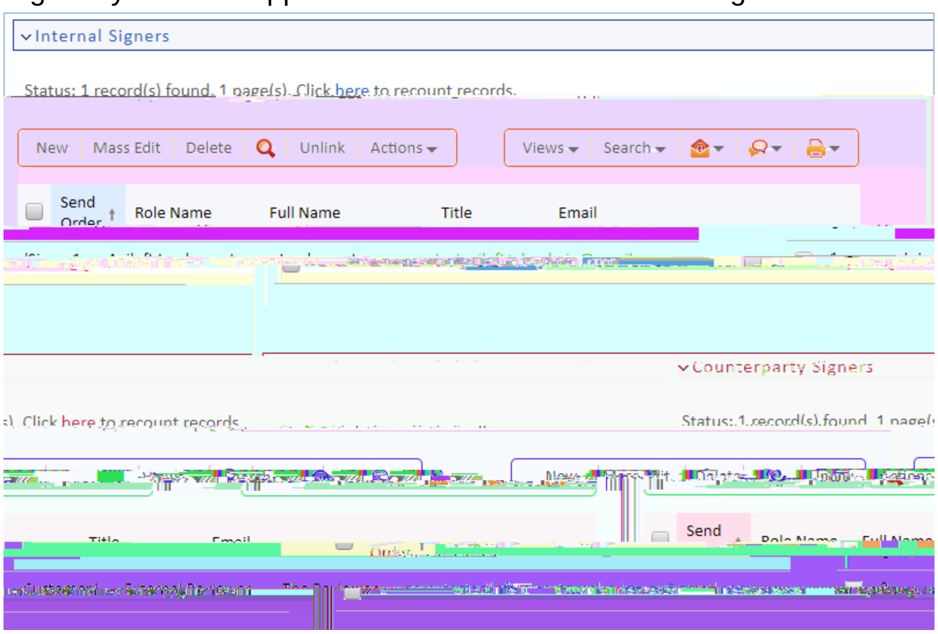
The document must be signed by any users listed in the Internal Signers and Counterparty Signers sections of the Details tab. The internal list will eventually be automatically populated based on a number of factors, including the Business Unit, Division/School and Department selected, as well as the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

For this first phase, you must specify all signers.

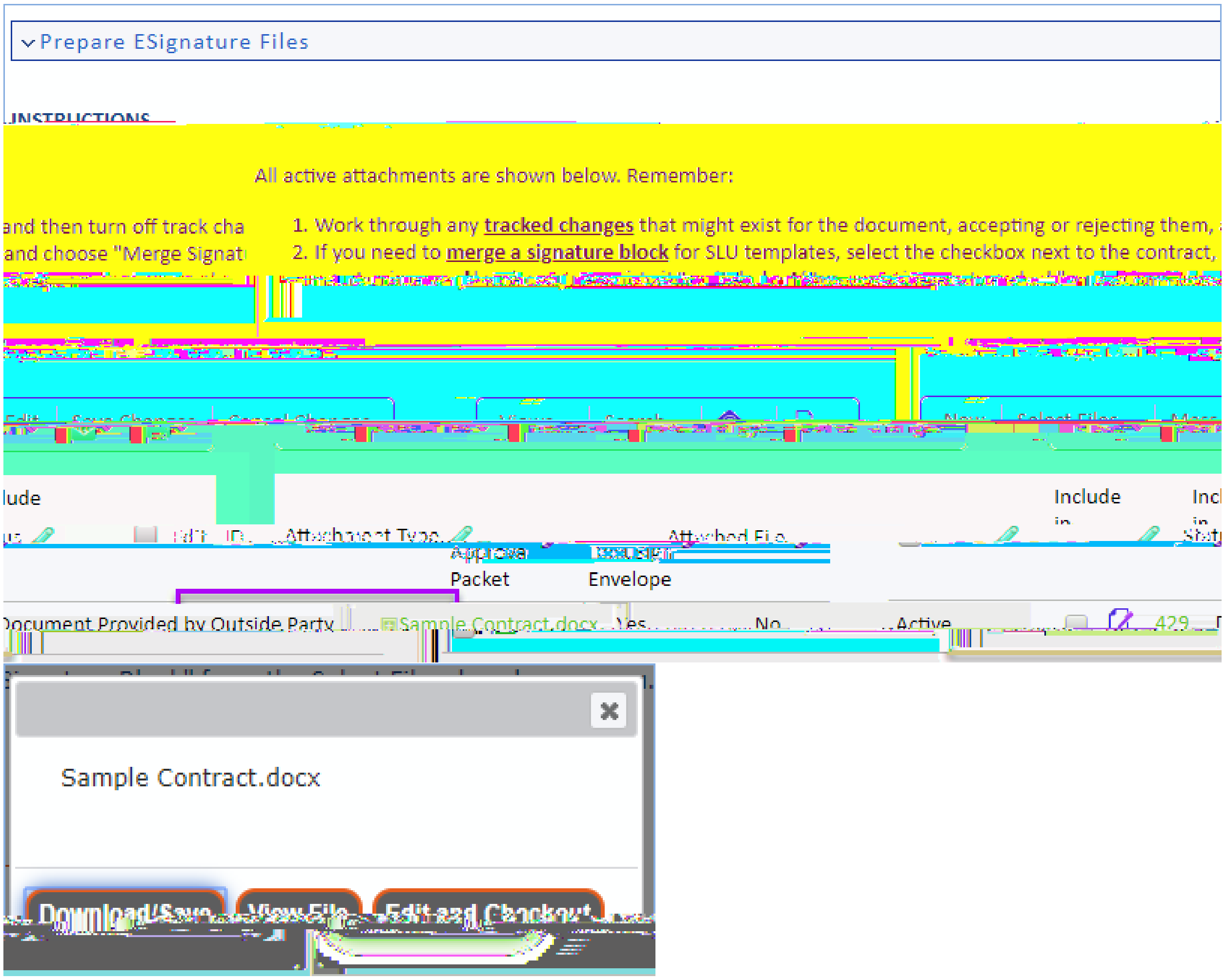
1. Click the Signature tab. Add as many signers as you need using the Add Signer form. You may use the magnifying glass lookup to find users already stored in the People table, or you can manually type in their Name, Title, and email address. Send Order is the order in which DocuSign routes the envelope 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:

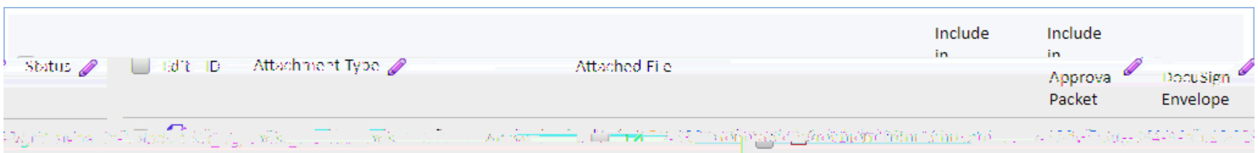


3. Now it's time to prepare the Contract document itself. Click the blue hyperlinked Attached File and choose Edit and Checkout. This will save your changes directly to the Word file on the server:



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:

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:

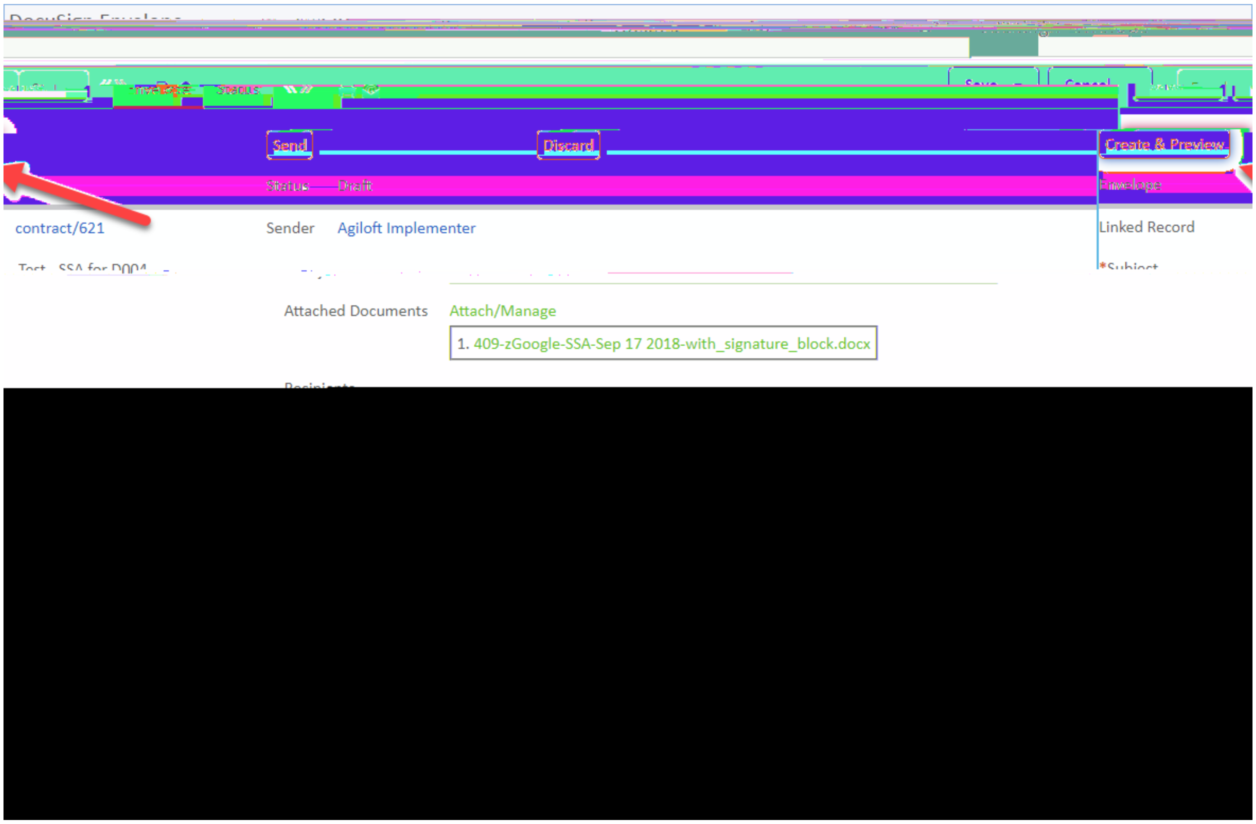


6. Adjust any other attachment records as necessary using the Quick Edit field "Include in DocuSign Envelope." Any files that you want to be included in the envelope must be set to Yes. Once you've done that and saved each entry, click Refresh Files to show the Files that will be included in the envelope:

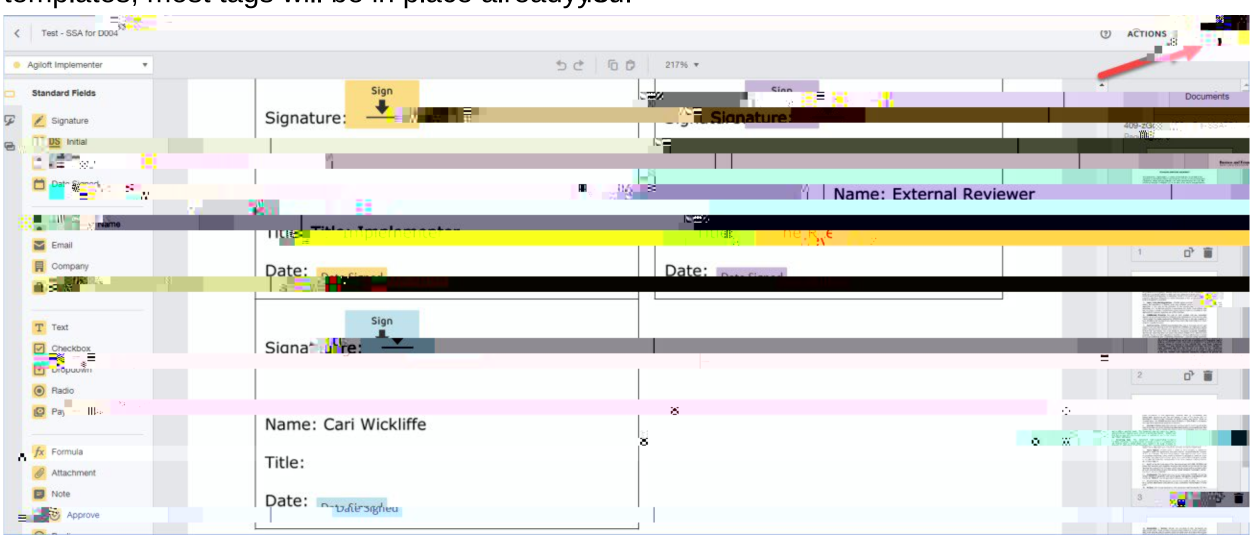
7. Click Create DocuSign Envelope:

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:



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.



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.