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Conceptsand Definitions

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

- x Power User Interfaction 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 Navigadip and The Bento Menu which has view of all tables and forms to which you have ess.
- x Table-Tables contain a set of fields, records, icans and rules for a specific purpose, such as for managing contracts in Contracts, holding user details in People, and holding company details in Company.
- x 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 **Diepen**ts). 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 tpage.
- 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)-3.u s[(C)41.3 (e)0.7t (o)-1.h3 (e)0.7(r)-5.")26melic31.7 (o)-3.u s[(C)41.3 (e)0.7t (o)-1.h3 (e)0.7(r)-5.")26melic31.7 (o)-3.u s[(C)41.3 (e)0.7t (o)-1.h3 (e)0

TheTableView

The table view opens when you click any table heading in the navigation bane 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; seaschetermine which records are included, and in what order they are returned.

To add a custom view:

1. SelectViews New

- 2. In the View wizard, define the options for displaying the view duding:
 - a. Whether selection checkboxes should displayed.
 - b. How many vertical lines should be shown per record and lifised
 - c. All fields to display in the view, the text alignment, and which fields should be used to open the record in Edit and Viewwode.
- 3. In the Order/Colors tab, drag the fields left or right to define the order of fields in the transformation.
 - a. Click Set Row Coloring to set a color scheme fofiethets.
- 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 records to display perage.

Printing Record/iews

To print all the records in a view:

- 1. Select a number of records in the view, then navigat@rtimt icon > Print/Download Table View.
- 2. In the popup screen, clid?rint.

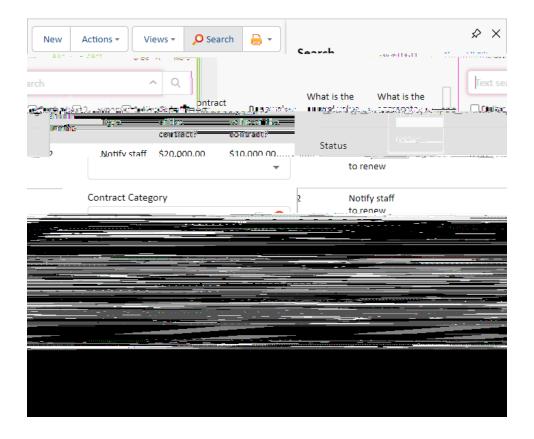
Sorting Records in a View

Click the field heading to sort the records by that column. To add a second **conting**n, 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 defaulteds 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:

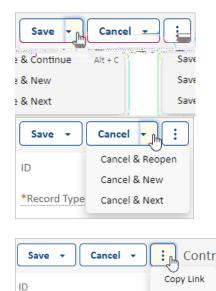
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For more information, seamport Export

o Views-see

Cancebuttons. button in viewmode. Note that if you do not have edit permissions you will only see Choese

In edit mode you will see input boxes, drdpwns for choice fields, and radio buttons to help lookup and select the field values. Only one user may edit a record at a **ainde**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.



Usingthe RecordForm

Print

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 obtefore 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 onscreen popup notification.

Conditionally Required Q852 61.026

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 und**erst** some aspects of this type of data.

To add documents to the field, simply drag them from your desktop into the Drag& Despield. 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 Mick/soft 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 reficeted
- 2. This opens a dialog with the followi**og**tions:

- a. Download/Save downloads the file to your desktop where you must open, edit and re-upload itmanually.
- b. View File opens the file in view mode. Click Enable st edsdit anr re-ul(t)0.6oade .7 16 -32.355 -



The SLU CMS gives you primary access to several tables that are important for for 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 arimiteract with the other tables in the system.

For example, the Attachments table is not shown in your top navigatiop draw, 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 p navigation bawill 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 stables to distinguish between Employees and External Users and holds the details of all employees and contacts in the system. **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 isstill the system of record for SLINew companies that you may add to Agiloft do NOT automatically get addet 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 buttointself, 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 compasuch 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

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Edit an existig Contact by clicking Edit on the existing Contactord.

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 navigation panewill 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 navigationichar

- 10. As with the initial approvals, handle any changes required by the Departiter and adhoc approvers.
- 11. When all changes and approvals are completely the Word document to accept all changes and stop tracking, create the DocuSign Envelope, and send it signfature.

Overviewof ContractTabs

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

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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 Fieldfor Contract Manager

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

x Granted Accessused 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.

AttachmentsTab

The Attachments tab shown below is used to manage contract documents and makespuse of <u>templates</u>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 <u>istanhed file field</u> and allows you to define the document type.

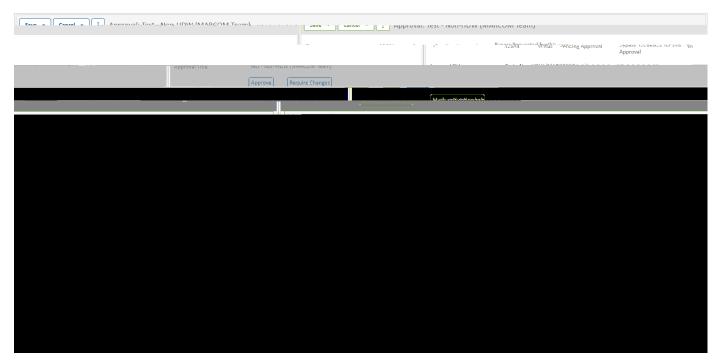
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If necessary, the Contract Manager or an Approver generate additional approvals on an adhoc basis. The approvals can be seen in the related table of Approvals Needed, shown below

Once alapprovals 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 approvalsement step of the workflow are shown in the table of Next Approvals.

Minur - Courch Oralleline Approved/Rejected ID + Step Number Status Approval Title
Approver Approved/Rejected ID Step Number Status Approval Title
Minute Step Approved/Rejected Approver Approved/Rejected ID + Step Approval Title
Approver Approval Team Approved/Rejected ID + Step Status Approval Title
Approver Approval learn
onroval Test - Non-HD2021 np3ec.Team

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 tract 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.

EmailsTab

The Emails tab shown below allows you to perform various errelaited 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 contractingmpany.
- 2. You can type the subject line and body into the Email Subject and Emailelidesxt
- 3. Select the active attachments you want to include with elmeail.
- 4. The Send Email button sends the email. When someone replies to the email the Contract Manager and parties on the email are copiethy documents contained in the reply will be put into the Attachmentstab.
- 5. Email Communication History displays a list of all emails sent and received by this contract record.

Renewal/ RelatedContractsTab

Related Contracts

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

- x The contract Status must be Active, Canceled, Expiresigned.
- x The related contract type must not be the same as the current contract. This is to enforce the parent/child relationships betwee**c**ontracts.

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

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 <u>a Relationship Diag</u>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 atvioug geeninder emails about it. If no further action is required, you can also simplo ctr.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 DepartmenApprover.

Reviewthe Request–ContractManager ApprovalStep 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 Approvaltsab.
- 2. Click the Edit icon to open the Contract Manager approval step, and Applic by e:

p 22 2018 974 Sample Sponsorship 2	Pending Kimberly Se
120	Mai
A	Approva.

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.

Preparingfor 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:

sunteri superiore concent	

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

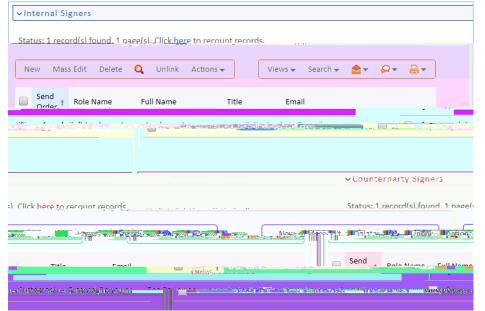
The document must be signed by any users listed in the Internal Signers and Counterparty Signers sections of the Details tab. The internal list will eventually be automatically populated based on a number of factors, including the Business UDitvision/School and Department selected, as well as the dollar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

For this first phase, you must specify all signers.

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 Orderotsotthe 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,rdapradty signers are
Customer role names. Click Addigner.

×Add Sign	er						
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2. Signers you ded will appear in related tables of Internal Signers and Counter Stagtyers:



 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 M/ordtfie server:

✓Prepare ESignature Files	ō				
JNSTRUCTIONS					
All act	tive attachments are sh	own below. Rer	nember:		
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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 passwordu"s(all lowercase). Accept or reject changes; accept them all and stop tracking by choosing Accept > Accept all changes and stop tracking. Save the Woodd file close If you're using a SLU template for the SSA or the Affiliation Agreements, youewillone merge the signature block. Click the box to the left of the contract document to be signed, hover over Select Files, and choose Merge SignatBurek:

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

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- 6. Adjust any other attachment records as necessary using the Quick Edit field "Include in DocuSign Envelope." Any filets at 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 DocuSigmvelope:

8. The DocuSign Envelope form will display, showing the Internal and External Signers youas tered DocuSign Recipients, along with the file(s) that will be included in the envelope. Clickate

Preview:

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	Posinianta			

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

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10. When you're ready, clic&end.

Status Changes

DocuSign will handle emailing all of the process. Docusign 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 Pendingt Gign

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 **Attae**nts tab, the status will change to Signedbr Active.