Initiating a Process
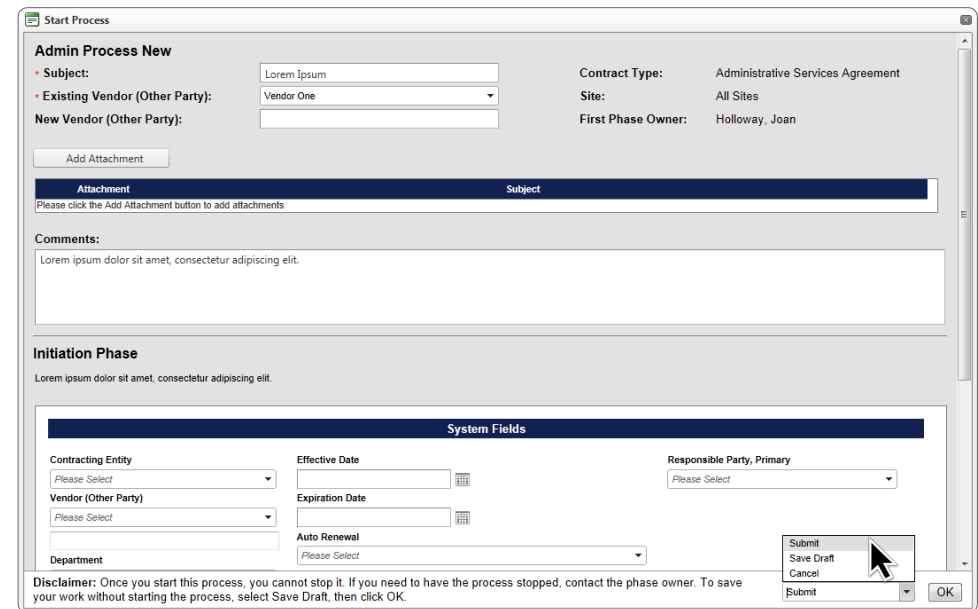
◆ Log into the database, then click on Take Action in the module ribbon.

◆ Select the following items:
  • Action Type   • Organization   • Contract Type   • Site*
  Site may not apply.

◆ Click the Start button.
  The Start Process popup will appear.

◆ REQUIRED: Enter the subject and select the vendor.

◆ If applicable, add an attachment.
  Depending on your database settings, this feature may be required, optional or unavailable. Contact your system administrator for details.

◆ OPTIONAL: Enter any comments.

◆ If applicable, enter or select values in the system and custom fields.

◆ In the bottom right corner, select an action, then click the OK button.
  • Select Submit (default) to start the process.
    If you do not have access to the next phase, a confirmation popup will appear.
    If you have access to the next phase, the process page will appear.
  • Select Save Draft to save the process for later.
    You'll be able to access it in Process Drafts in the navigation pane.
  • Select Cancel to discard the process.

Quick Tip

Once you submit a process, it cannot be stopped. If you need to have a process stopped, contact the phase owner.

Adding Attachments

◆ In the Start Process popup or the process page, click the Add Attachment button.

◆ Enter the attachment subject.
  • To delete the attachment, click the ❌.

◆ Click the Browse button to browse for an attachment.

◆ In the dialogue, select the appropriate file, then click the Open button.
  • To remove the file, click the x Remove icon.

Adding Comments

◆ On the process page, enter your comment in the comment box.

◆ If applicable, select users who should be notified by email of your comment.

◆ Click the Save button.
  You comment will be saved in the comment history.

Quick Tips

➢ Your comments will be visible to anyone with access to the process.

➢ You cannot edit or remove comments after saving them.

➢ To view a list of all comments in a separate window, click the View All button.

Adding Reviewers/Approvers

◆ In the process page, click the Add Reviewer(s)/Approver(s) button.

◆ In the popup, select the reviewers and/or approvers you'd like to add.

◆ If desired, edit the settings for each field:
  ▪ To make the fields editable to the selected reviewer, select Edit.
    This is the default setting.
  ▪ To make the fields read-only to the selected reviewer, select Read Only.
  ▪ To hide the fields from the selected reviewer, select Hidden.
  ▪ To require that the fields be populated, check the Required checkbox.

◆ When finished, click the Save button.
  The reviewers and approvers you added will appear in the reviewers list.

◆ To delete a reviewer from the list, click the ✖.

◆ To move a reviewer up or down in the list, click one of the gray arrows.

◆ To edit a reviewer, click the ✏ icon.

*You can only edit or delete reviewer/approvers who have not yet completed their reviews.

Editing Fields

This can be done in the form, initiation and activation phases.

◆ Click the Edit button.

◆ Scroll down to the System Fields section and edit as needed.

◆ When finished, click the Save button.
   OR

◆ To cancel without saving your changes, click he Cancel button.

Initiation Phase

◆ On the process page, add any attachments.

◆ Add any reviewers or approvers.

◆ Add any comments.

◆ Edit any fields.

◆ IF APPLICABLE: To submit the phase for review, click the Submit for Review button.
If a reviewer declines a phase, you can make changes and resubmit for review or you can approve the phase and move on to the next phase.

◆ While the document is in review:
  • To recall the document from review, click the Recall Review button.

◆ To approve and go to the next phase, click the Approve Phase button.
The phase can be approved if all reviews are complete or if the phase has no reviewers.

◆ To reject the process, click the Reject button.
Upon rejection, you can revive and resubmit the phase.

Form Phase

◆ On the process page, add any attachments.

◆ Add any reviewers or approvers.

◆ Add any comments.

◆ Edit any fields.

◆ IF APPLICABLE: To submit the phase for review, click the Submit for Review button.
If a reviewer declines a phase, you can make changes and resubmit for review or you can approve the phase and move on to the next phase.

◆ To retract to the previous phase, click the Retract button.
This button is only available if the current phase is in pending status and the previous phase has been approved.

◆ While the document is in review:
  • To recall the document from review, click the Recall Review button.

◆ To approve and go to the next phase, click the Approve Phase button.
The phase can be approved if all reviews are complete or if the phase has no reviewers.

◆ To reject the process, click the Reject button.
Upon rejection, you can revive and resubmit the phase.

Document Source Phase

◆ In the document source dropdown, select the document source.
This may be predetermined.

◆ To edit the document, simply click inside the document and type as you would in a Word document.

◆ To insert a clause from the approved language library, click in the place you want to insert the clause, then double-click on the clause name in the approved language list.
To see clause text before inserting, hover the mouse cursor over the clause name.

◆ To insert a field value, click in the place you want to insert the field, the double-click the field.

◆ Enter any comments.

◆ When finished editing, click the Approve phase button to go to the next phase.
  ◦ To stop the process, click the Reject button.
  ◦ To retract the document and return to the previous phase, click the Retract button.

Document Review Phase

◆ If needed, add any reviewers or approvers.

◆ To submit the phase for review, click the Submit for Review button.
  OR

◆ To retract to the previous phase, click the Retract button.
  OR

◆ To reject the process, click the Reject button.

◆ While the document is in review:
  • To recall the document from review, click the Recall Review button.
  • To reject the process, click the Reject button.

◆ Once all reviews have been submitted:
  • To approve and go to the next phase, click the Approve Phase button.
  • To reject the process, click the Reject button.

Signatory Phase

Wet with Routing:

◆ If needed, add a signatory.
  ▪ Click the Add/Edit Signatory button.
  ▪ In the popup, select a signatory, then click the ⊕ icon.
  ▪ To save the added signatory, click the Save button.
◆ To submit the document for signature(s), click the Submit for Signature button.
◆ To recall the document from routing for signatures, click the Recall Signatures button.
◆ To retract the document, click the Retract button.
  This button is only available prior to submitting the document for signatures.
◆ To retract a particular version of the document to the previous phase, click the Retract by Document Version button. In the popup, select the document version you want to retract.
  This button is only available in pending or completed status.
◆ To reject the process, click the Reject button.
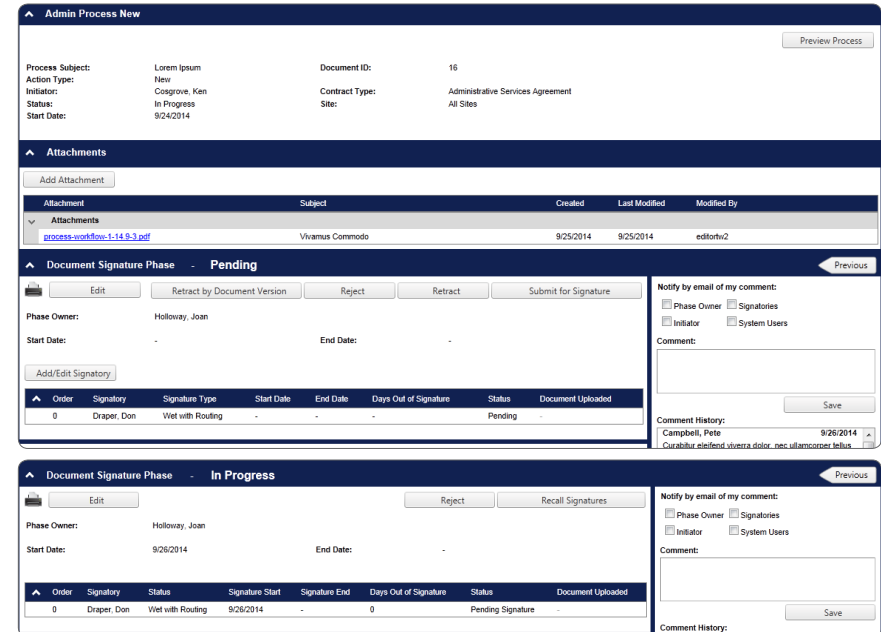
Wet without Routing

◆ To retract a particular version of the document to the previous phase, click the Retract by Document Version button. In the popup, select the document version you want to retract.
◆ To reject the process, click the Reject button.
◆ To download the current document version, click the Download Current Document button.
◆ To upload the signed document:
  ▪ Click the Browse button, then select the appropriate document.
  ▪ Click the Submit button.
◆ To approve and go to the next phase, click the Approve Phase button.

Quick Tip
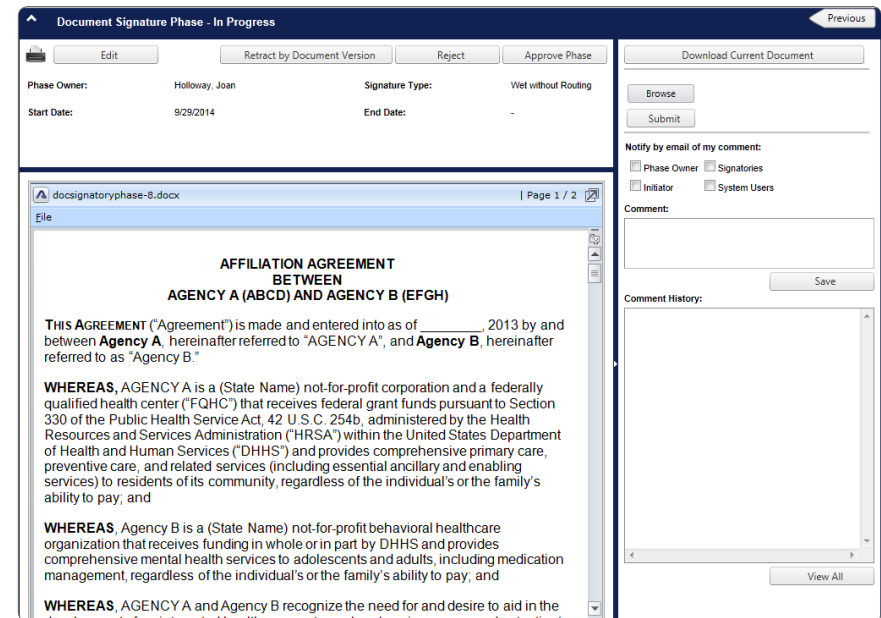
The phase owner can upload as many versions as needed.

Wet with Routing

Wet without Routing

Activation Phase

◆ Edit any system or custom fields as needed.
Red asterisks indicate required fields.

◆ To save your changes, click the Save button.

◆ To push the document to Contract Library, click the Activate button.
A confirmation popup containing a hyperlink the new contract will appear.

   ◦ To reject the phase, click the Reject button.

   ◦ To retract the phase, click the Retract button.

Quick Tip

Once the contract is activated, any changes must be made in Contract Library.