University of Louisville

SAI360
How to Add a New Contract or Document Guide

for Schools or Areas, Department and Division Responsible Parties

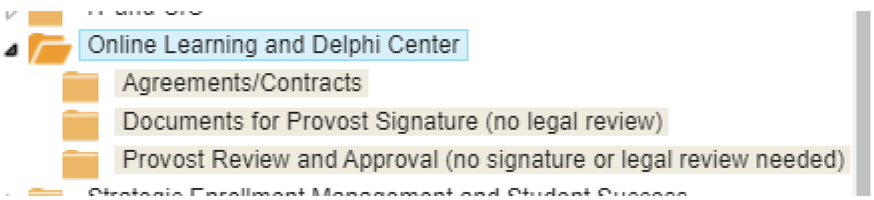
If you require additional assistance, please contact Tina Hembree
tina.hembree@louisville.edu

Note: SAI360 should not be used for processing Procurement agreements or Office of Sponsored Programs Administration (OSPA) contracts as they have an existing mechanism for processing. If you are unsure, please contact the Office of the University Counsel or Tina Hembree to help guide you through that determination.

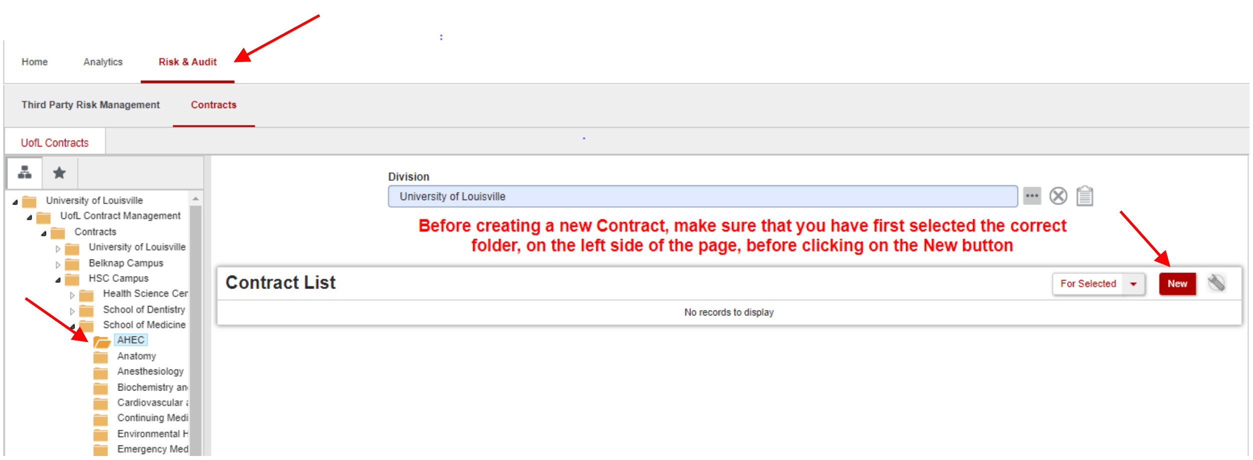
1. Navigate to Risk & Audit, then Third Party Risk Management and then the Contracts menu item.

2. Ensure you have the correct folder highlighted on the left-hand side in which to create the Contract record. – Depending on the type of item you are adding to the system, you need to Select one of the following options.
   - Agreements/Contracts- This is legal documents such as student placements agreements, Professional Services Agreements (revenue generating) MOUs and etc
   - Documents for Provost Signature but no legal review - This typically includes accreditation agreements, Letters of Support and so forth
   - Provost Review and Approval but no legal review or Provost Signature- An example is for the Provost to review a policy and procedures and to approve

   - **It is critically important to place your document, contract or issue in the correct folder or it will be routed incorrectly.**



3. Click the **New Contract** button next to Contract List.

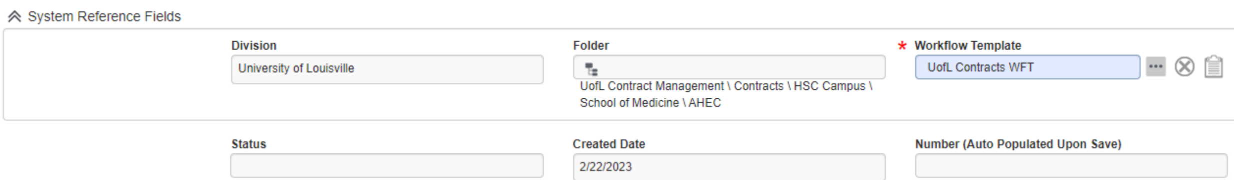


4. The Contract Entry page will open.

*****NOTE:** Please fill all fields with a red asterisk (*). All other fields will be completed by the Contract Admin team.

SYSTEM INFORMATION

The **System Information** section is auto generated therefore requires no entry.



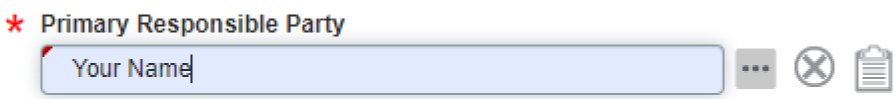
CONTRACT INFORMATION

Enter all required fields under **Contract Information** as outlined below.

➢ Primary Responsible Party

1. Verify that the **Primary Responsible Party** is correct. As creator of the Contract record, you will be defaulted as the Primary Responsible Party.

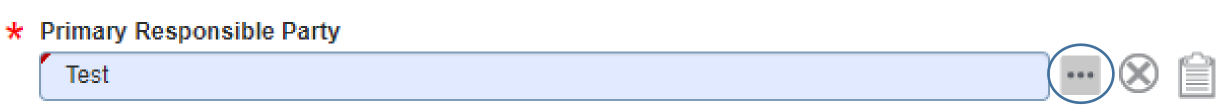
Display screen examples located on the next page here and often throughout this document



2. If you need to change the Responsible Party to someone other than you, then complete the following steps to locate the name:

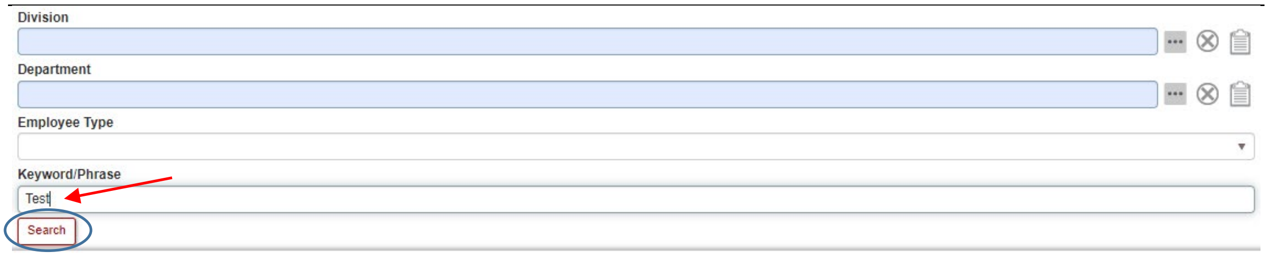
   a. Place the cursor in the field, begin typing the name and click on the name when you see it in the list.

   b. If typing in the name does not bring it up on the list, click the **Ellipsis** button (three dots) ⋯.



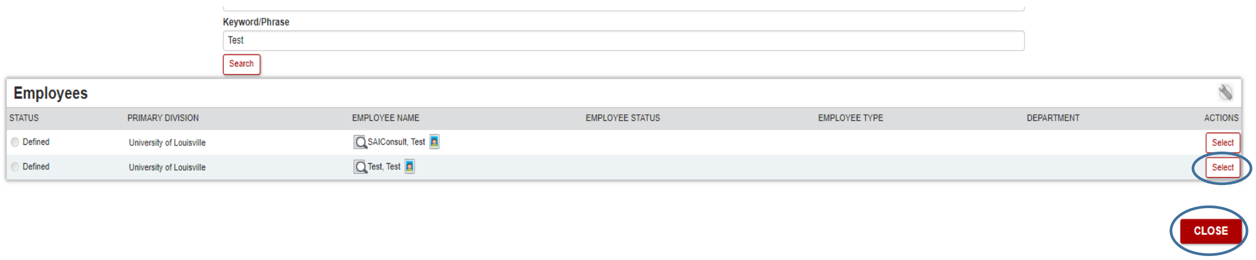
   c. Enter the last name in the Keyword/Phrase field.

   d. Click **Search**.



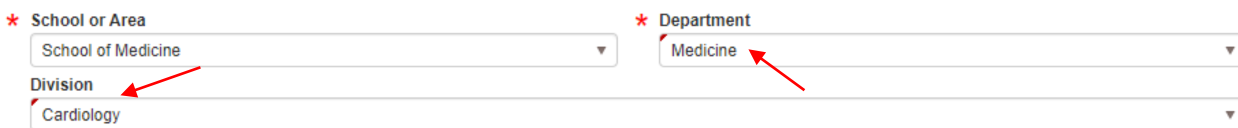
e. Locate the name in the Employees list, then click **Select**.

f. Click **Close**.

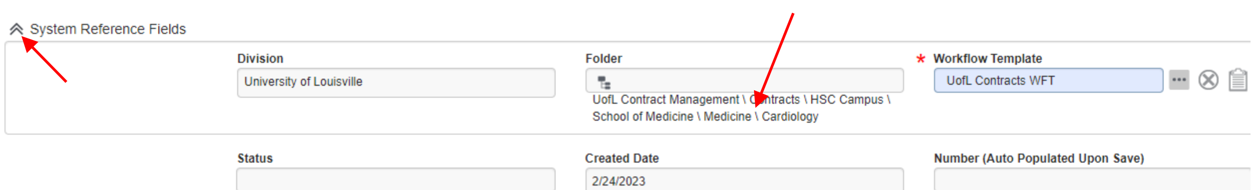


➢ School or Area, Department and Division

Select the **School or Area, Department** (*if applicable) and **Division** (*if applicable) from the dropdown menus. ***Depending on School or Area selected, **Department** and then also **Division may** auto-populate.



*****NOTE: If Division and/or Department auto-populates, please select those fields from the dropdown menus and then verify that you are in the correct folder. If you are not in the correct folder, select Return at the top (don't save) and begin again by selecting the correct folder, per Contract Record Creation above, and re-selecting New Contract.**



➢ Contract Name

When entering a **Contract Name,** please use the following **NAMING CONVENTION:**

➢ Contract Description

Under the **Contract Description** please enter a brief summary of the Contract.

FACILITY INFORMATION

➢ Facility Email Address (Third Party's Contact Information)

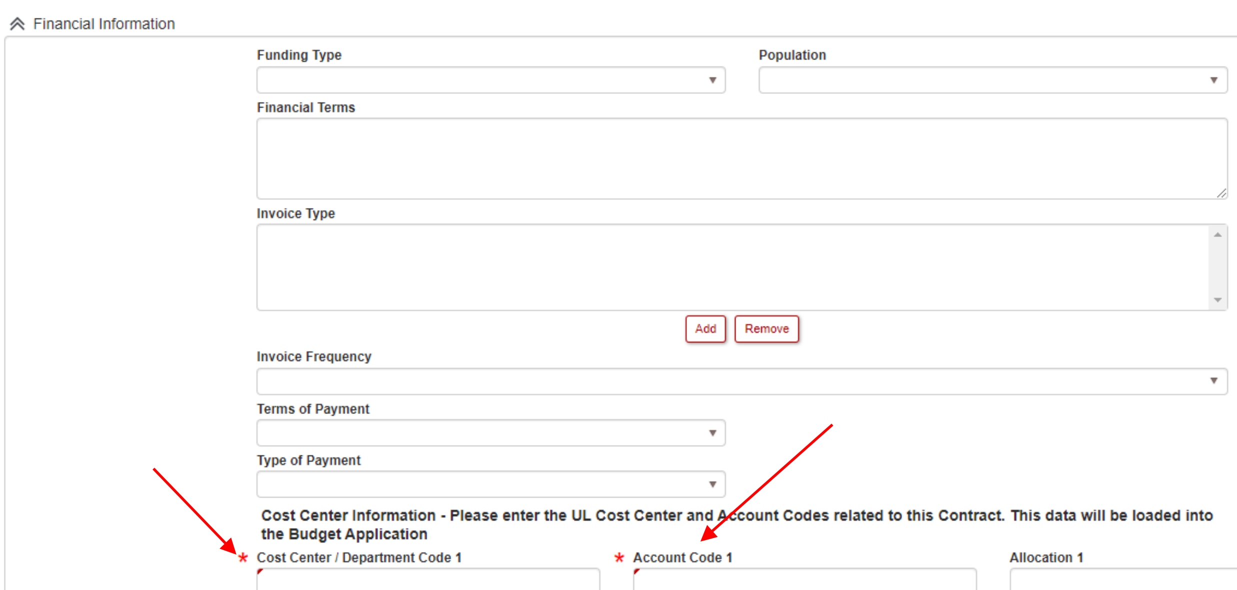
Please provide the Third Party's contact person's information, so that Contracts Administration can make contact when there are required changes and/or to obtain signatures.

FINANCIAL INFORMATION

➢ Annual Value of Contract

1. Please provide **Annual Value of Contract** (*if applicable), then hit Enter on computer keyboard. (*If there is **no Annual Value of Contract**, fill the field with a zero.)

2. **Cost Center/Department Code 1** and **Account Code 1** fields (identified by red asterisks) will auto-populate. Please provide those, as well. If unknown initially, fill with question marks (?).



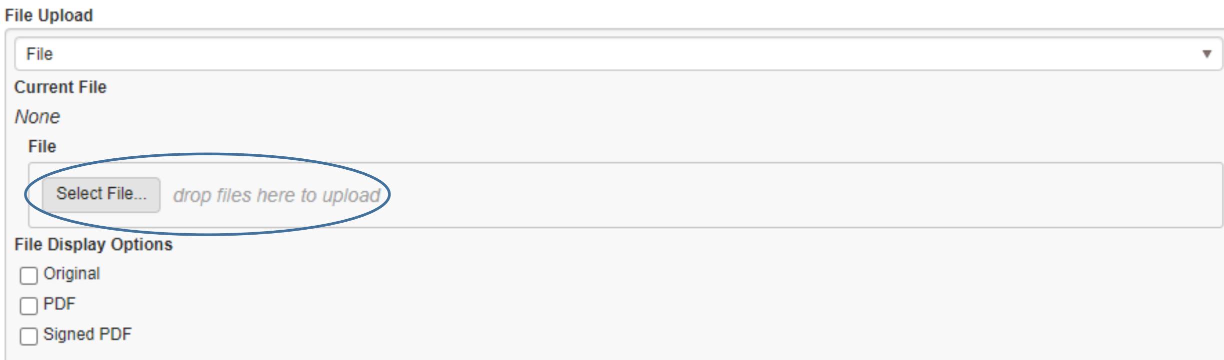
FILE INFORMATION

➢ File Upload

Upload the contract file in the **File Information** section (save attachments or previous documents in the Attachments section – see next page for instructions).

***You must click on SAVE at bottom of page before adding the Contract file.**

1. **Drag and drop** file to the "drop files here" zone or click **Select File**, locate the file to be uploaded and double-click on it to upload.



2. **Make sure both boxes next to Original and PDF under File Display Options are checked and document is uploaded.**

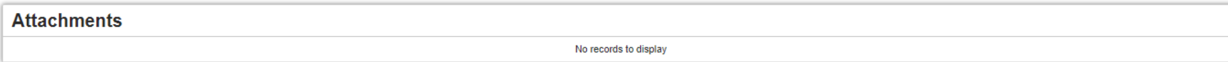
3. Click **SAVE** at bottom of page to upload attachments, or **SAVE AND RETURN** if done.

ATTACHMENTS AND COMMENTS (Optional)

➢ Attachments

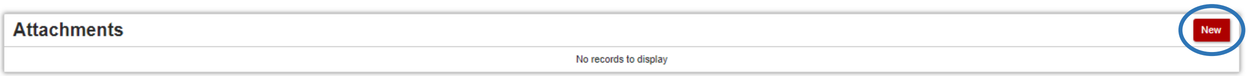
1. Upload any backup, previous documents or information that pertains to the Contract that you wish to keep on file.

2. ***NOTE: You will not see the **New** button in the Attachments section until you've clicked **Save**.**



3. Click **Save** at bottom of page, not Save and Return, to upload Attachments.

4. Click the **New** button next to **Attachments**.

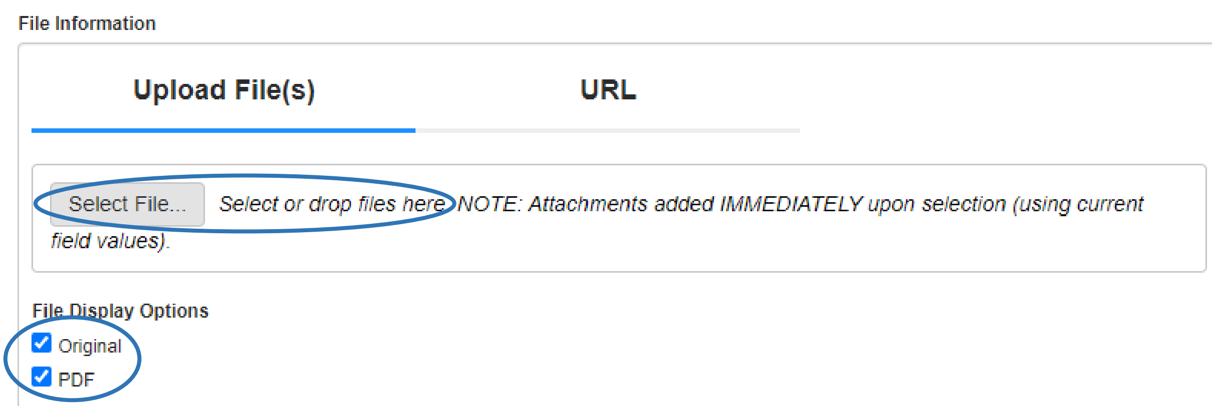


5. A new page called **Attachment Information** will open.

6. Leave the option **"External File/URL"** at the top.

7. **Drag and drop** file to the "drop files here" zone or click **Select File** to upload document.

8. ***** NOTE: Make sure both boxes next to Original and PDF under File Display Options are checked.**



9. Click **Close** and you will be returned to the **Attachments and Comments** page, and you will now see the document listed in the File field.

10. Click **Save** and **New** attachment if you have multiple documents to attach.

➢ Comments

Add a Comment by clicking **New** next to **Comments.** Type your comment and click **Save** or **SAVE AND NEW COMMENT** if you have more than one comment.

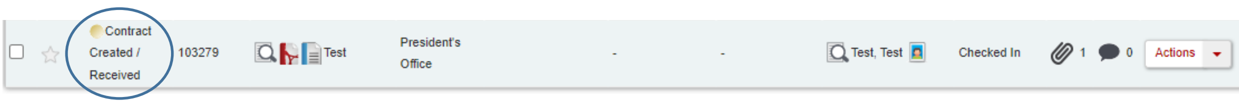
FINAL STEPS

➢ Save and Return

1. When finished entering all required (*) information about the Contract at this time, click **SAVE AND RETURN** at bottom or top of page.

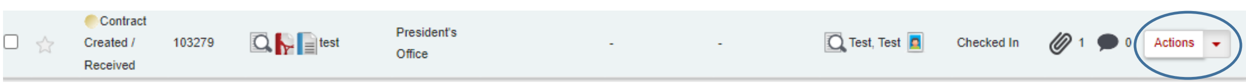
2. You will be returned to the Contract List. And the new Contract will be displayed as **Contract Created/Received**.

3. *****NOTE: Contract Admin will not be notified of the Contract when in Contract Created/Received status. See next and final step to submit for review.**

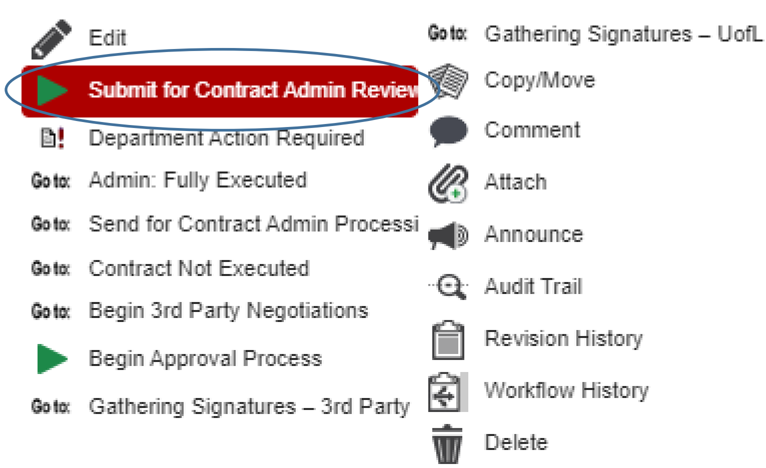


➢ Send to Contract Administration

1. When ready to release to Contract Admin to have the Contract added to their To-Do List for review, click the **Actions** dropdown button.



2. Select **Submit for Contract Admin Review.**



This completes the process

Thank you