

University of Louisville

SAI360

**How to Add a New
Contract or
Document Guide**

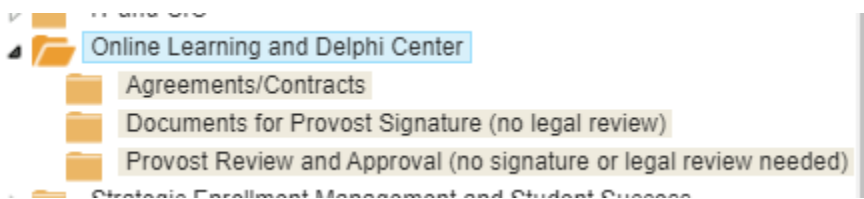
**for Schools or Areas, Department and
Division Responsible Parties**

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

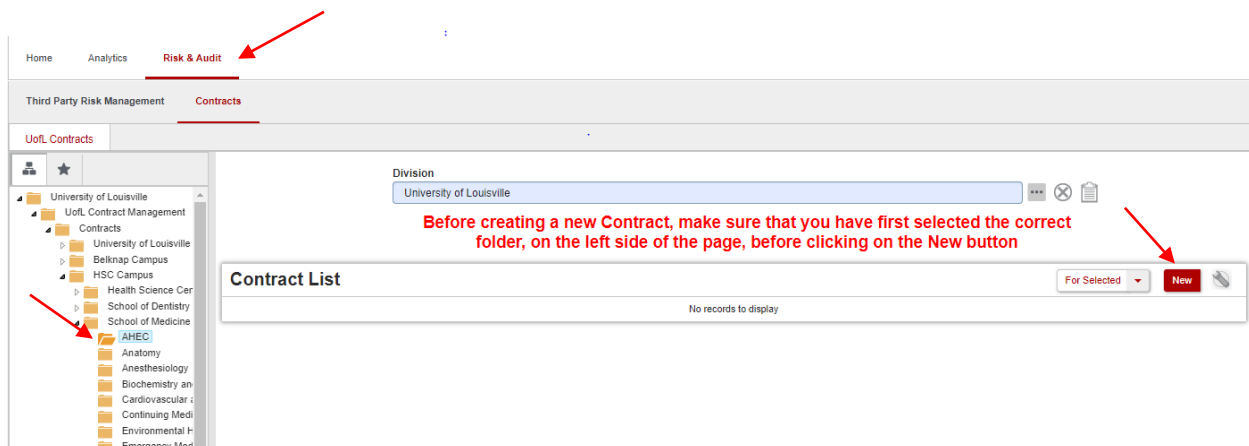
Note: SAI360 should not be used for processing Procurement agreements or Office of Sponsored Programs Administration (OSPA) contracts as they have an existing mechanism for processing. If you are unsure, please contact the Office of the University Counsel or Tina Hembree to help guide you through that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

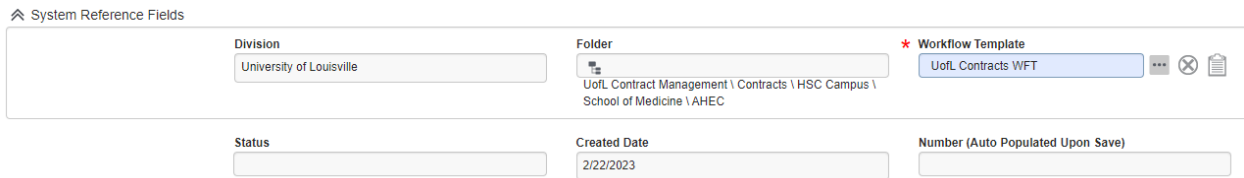


4. The Contract Entry page will open.

*****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.



System Reference Fields

Division University of Louisville	Folder UofL Contract Management \ Contracts \ HSC Campus \ School of Medicine \ AHEC	* Workflow Template UofL Contracts WFT
Status	Created Date 2/22/2023	Number (Auto Populated Upon Save)

CONTRACT INFORMATION

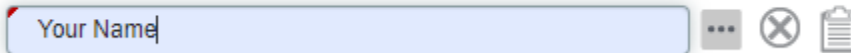
Enter all required fields under **Contract Information** as outlined below.

➤ 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

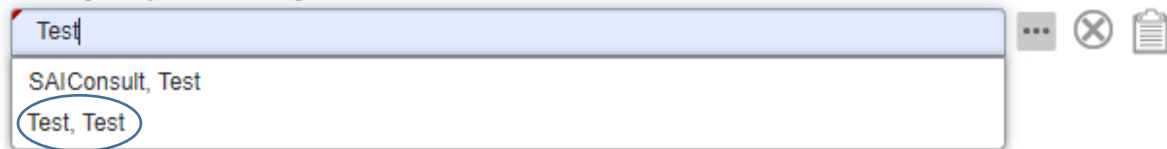
* Primary Responsible Party



Your Name


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.

* Primary Responsible Party



Test

- SAIConsult, Test
- Test, Test

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

* Primary Responsible Party



Test

- c. Enter the last name in the Keyword/Phrase field.
- d. Click **Search**.

Division

Department

Employee Type

Keyword/Phrase

Test

Search

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

f. Click **Close**.

Keyword/Phrase

Test

Search

STATUS	PRIMARY DIVISION	EMPLOYEE NAME	EMPLOYEE STATUS	EMPLOYEE TYPE	DEPARTMENT	ACTIONS
Defined	University of Louisville	CAIConsult, Test				Select
Defined	University of Louisville	Test, Test				Select

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.

* School or Area

School of Medicine

* Department

Medicine

Division

Cardiology

*****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**.

System Reference Fields

Division

University of Louisville

Folder

UofL Contract Management \ Contracts \ HSC Campus \ School of Medicine \ Medicine \ Cardiology

* Workflow Template

UofL Contracts WFT

Status

Created Date

2/24/2023

Number (Auto Populated Upon Save)

➤ Contract Name

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

* Contract Name

UL DEPT DIV 3rdPARTY CONTRACT TYPE

➤ Contract Description

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

* Contract Description

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.

* Facility Email Address

Contact's Name

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 (?).

* Annual Value of Contract

\$1,000.00

⌵ Financial Information

Funding Type	Population	
<input type="text"/>	<input type="text"/>	
Financial Terms		
<input type="text"/>		
Invoice Type		
<input type="text"/>		
<input type="button" value="Add"/> <input type="button" value="Remove"/>		
Invoice Frequency		
<input type="text"/>		
Terms of Payment		
<input type="text"/>		
Type of Payment		
<input type="text"/>		
Cost Center Information - Please enter the UL Cost Center and Account Codes related to this Contract. This data will be loaded into the Budget Application		
* Cost Center / Department Code 1	* Account Code 1	Allocation 1
<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

File Upload

File

Current File

None

File

Select File... drop files here to upload

File Display Options

Original

PDF

Signed PDF

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

File Upload

File

Current File

 Test.docx

File

Select File... drop files here to upload Done ✓

Test.docx 100%

File Display Options

Original

PDF

Signed PDF

Select PDF... drop files here to upload

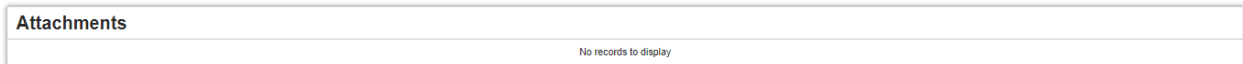
3. Click **SAVE** at bottom of page to upload attachments, or **SAVE AND RETURN** if done.

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.

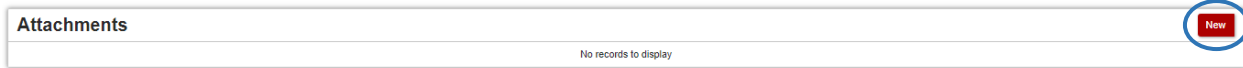
2. ***NOTE: You will not see the **New** button in the Attachments section until you've clicked **Save**.



Attachments

No records to display

3. Click **Save** at bottom of page, not Save and Return, to upload Attachments.
4. Click the **New** button next to **Attachments**.



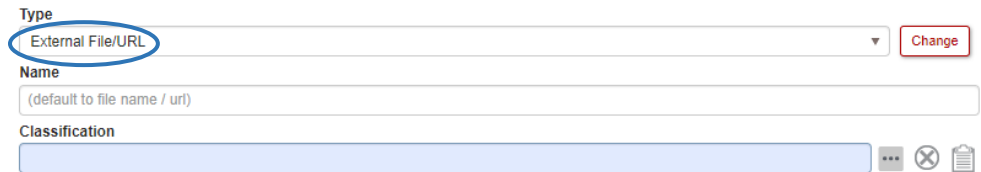
Attachments

No records to display

New

5. A new page called **Attachment Information** will open.
6. Leave the option "**External File/URL**" at the top.

Attachment Information:



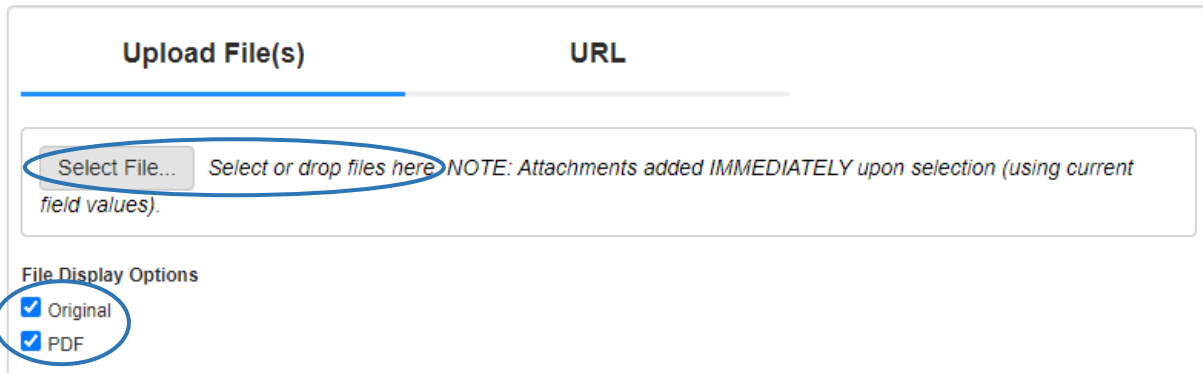
Type
External File/URL Change

Name
(default to file name / url)

Classification

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.

File Information



Upload File(s) URL

Select File... Select or drop files here NOTE: Attachments added IMMEDIATELY upon selection (using current field values).

File Display Options

Original

PDF

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.

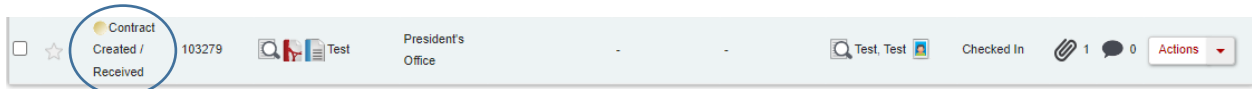
FINAL STEPS

➤ **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.

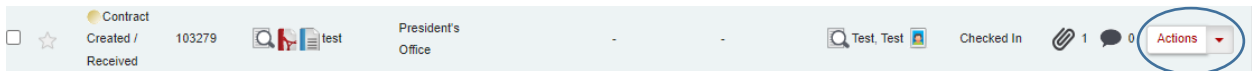


2. You will be returned to the Contract List. And the new Contract will be displayed as **Contract Created/Received**.
3. *****NOTE: Contract Admin will not be notified of the Contract when in Contract Created/Received status. See next and final step to submit for review.**

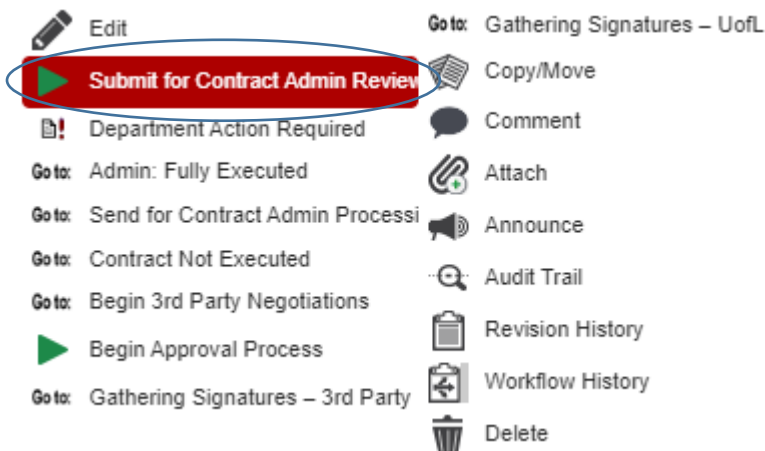


➤ **Send to Contract Administration**

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