UM Contract Management Portal

Contract Submission Tool: User Training Guide

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This guide walks team members through the seven core workflows of the UM Contract Management Portal, beginning with submission and ending with administrative bulk import. Two of the seven workflows differ from earlier scoping conversations and are flagged accordingly so trainers can set accurate expectations during onboarding.

1. How to Submit a Contract

Contract submission is a two-step wizard accessible to any authenticated user, and is the primary entry point for departments routing work to the Office of Contracts.

1. Click **Submit Contract** in the top navigation.
2. On Step 1, drag your contract files into the drop zone, or click the zone to browse. Allowed file types are PDF, DOCX, DOC, XLSX, CSV, and TXT, capped at 25 MB per file.
3. Click **Continue to Details →**. The system stages your files and scans the first one for sensitivity keywords (NIL, Trade Secret, Alcohol, Facilities).
4. On Step 2, review the auto-checked sensitivity tags at the top of the form. Adjust them if the system guessed wrong.
5. Complete the required metadata: Contract Name, Contract Type, Campus, Department, Second Party, and Start Date. Contract Number can be left blank for auto-generation. End Date, Dollar Amount, and Notes are optional.
6. If a duplicate-detection or missing-clause warning appears, read the panel, then tick the acknowledgement checkbox to proceed.
7. Click **Submit Contract**. You will land on the new contract's detail page with the confirmation banner *"Contract '<name>' (<number>) submitted successfully!"*

If approval rules match the contract's metadata, the status will auto-flip from Submitted to Pending Approval and the first approver will be notified.

2. How to Update the Status

Status updates are made directly from the contract detail page rather than from a central queue, which keeps the change tied to a specific record and its audit trail.

8. Open the contract from the dashboard, search results, the My Reviews list, or the calendar view.
9. Locate the **Update Status** card in the right sidebar. The card is visible only to managers, admins, and the user assigned as reviewer for that contract.
10. Select a new status from the dropdown. Valid values are Submitted, Pending Approval, Under Review, Entered into JAGGAER, Approved, Rejected, Completed, and Expired.
11. Optionally, type a reason or context note in the **Status notes** textarea.

12. Click **Save**. A browser confirmation dialog will ask *“Change status to ‘<X>’?”* Click OK to commit.
13. The page reloads with the banner *“Status updated to ‘<status>’.”* The submitter and the assigned reviewer receive an in-portal notification.

> **Gotcha:** Clearing the Status notes field and saving will overwrite any existing note with an empty value, so preserve prior context if it still applies.

3. How to Assign a Reviewer

Reviewer assignment is restricted to managers and admins and confers status-update authority on the assigned user, even if that user is otherwise viewer-level.

14. Open a contract detail page.
15. In the right sidebar, find the **Reviewer** card. It will display either the current assignment or *“No reviewer assigned.”*
16. Choose a user from the dropdown. Options are formatted as *“Display Name (Department)”*. Select **— Unassigned —** to clear the current assignment.
17. Click **Assign**.
18. The page reloads with the banner *“Assigned <name> as reviewer.”* or *“Reviewer assignment cleared.”* The assigned reviewer receives a notification.

Admins can assign any user system-wide. Managers are limited to users in the contract’s own department; attempts to cross departmental boundaries return a 403 error.

4. How to Redact a Contract

> **Important scope clarification for trainers:** the portal does not include an in-application redaction tool. Users must redact PDFs in external software (Adobe Acrobat, Foxit, or equivalent) before uploading the result. The portal manages storage, download, and the Trade Secret queue, but the actual blacking-out of text happens offline.

19. From the top navigation, click **Redaction Queue** to see all Trade Secret contracts that still need a redacted copy. Alternatively, open a contract directly and click the **Upload one →** link inside the Redaction card.
20. Click **Manage →** on the contract row you want to work on.
21. Read the contract metadata to confirm you have the right document, then download the original from the contract detail page if you do not already have it.
22. Open the PDF in your redaction tool, black out all sensitive text, and save the redacted version locally.
23. Return to the redaction page in the portal, click the file picker labeled **Redacted PDF**, and select your locally redacted file. Files must be PDF format and under 25 MB.
24. Click **Upload redacted copy**.

25. The page reloads with the banner *“Redacted copy uploaded.”* The warning panel is replaced by a success panel offering **Download redacted copy**, and the original submitter receives a notification.

Only admins can remove a redacted copy once uploaded; managers can upload but cannot delete. The Trade Secret queue lists only contracts whose sensitivity tag is Trade Secret and that lack a redacted copy, so NIL, Alcohol, and Facilities contracts will not appear in the queue even though they may carry sensitivity flags.

5. How to Amend a Contract

Amendments allow managers and admins to record changes to an existing contract (price adjustments, scope additions, term extensions) without overwriting the original record. Each amendment is numbered sequentially and carries its own approval lifecycle.

26. Open the parent contract detail page and scroll to the **Amendments (n)** section.
27. Click **+ File New Amendment**. The form page loads with the header *“New Amendment for <contract name>: This will be amendment #N.”*
28. Complete the form: **Amendment Name** is required (for example, *“Quantity increase to 750 units”*), and Description, Effective Date, and Dollar Change are optional. Dollar Change accepts negative values for reductions.
29. Optionally attach a supporting file using the **Attachment (optional)** picker. Allowed types match the main upload form, capped at 25 MB.
30. Click **Create Amendment**. You will land on the amendment detail page with the banner *“Amendment #<n> ‘<name>’ created.”*
31. The amendment status begins at Draft. To advance it, use the **Update Status** card in the right sidebar. Valid transitions are Draft → Under Review → Approved, or Draft → Rejected, or Under Review → Rejected.
32. Each save triggers the banner *“Amendment status updated to ‘<status>’.”* and notifies the amendment’s creator.

Approved and Rejected are terminal states with no path back, so trainers should emphasize that users verify accuracy before transitioning out of Under Review. Attachments uploaded with an amendment also appear in the parent contract’s attachment sidebar, linked through both the contract and amendment IDs.

6. How to Create a New Delegation

Important scope clarification for trainers: delegation operates at the queue level, not at the individual contract level. A delegation hands off the user’s entire incoming review and approval queue to another user for a defined date window. The original training outline mentioned selecting a specific contract to delegate; that workflow does not exist in the system and should be removed from any user-facing materials.

33. Click **Delegation** in the top navigation.

34. The page presents three sections: Your active delegation, Incoming delegations from other users, and Create new delegation.
35. In the create form, select a user from the **Delegate to** dropdown. Admins see every active user in the system; all other users see only active members of their own department.
36. Pick a **Start date** and **End date** using the date pickers. Both must be today or later, and the end date must fall on or after the start date.
37. Optionally add a brief **Reason** (max 200 characters).
38. Click **Create delegation**. The banner *"Delegation created."* confirms the action, the new delegation appears under Your active delegation, and the delegate receives a notification.
39. To end a delegation early, click **Cancel delegation** in the active delegation card. The banner *"Delegation cancelled."* confirms.

Each user may have only one active outgoing delegation at a time; creating a new one silently deactivates any prior active delegation. The system also includes cycle protection: if A delegates to B, B to C, and C back to A, the resolver caps the chain at three hops to prevent infinite loops.

7. How to Batch Import

Batch import is an admin-only workflow designed for migrating historical contract data into the portal in a single operation, bypassing the wizard's interactive parsing, duplicate checks, and clause checks.

40. Click **Batch Import** in the top navigation. The page presents three numbered sections.
41. Step 1: Click **Download CSV template**. A file named *batch_import_template.csv* downloads, containing example rows and the required column headers including an attachment_filename column for referencing supporting documents.
42. Offline, populate the template with your contract data. Reference attachments by filename only (no folder paths) in the attachment_filename column.
43. Step 2: In the Validate CSV form, select your filled CSV in the file picker, then click **Validate CSV**. The system runs a dry-run check and renders a results page with each row highlighted green (valid) or red (invalid). No data is written to the database during validation.
44. Review the validation report. Correct any flagged rows in your local CSV and re-validate as needed.
45. Step 3: In the Import form, select the validated CSV again. Optionally, attach a ZIP archive containing the supporting documents whose filenames match the attachment_filename column. Click **Confirm Import**. The button disables and displays *"Importing... please wait."* to prevent double-submission.
46. The results page renders with summary banners: *"Imported <n> contract(s) successfully."* in green and, if applicable, *"<n> row(s) failed to import."* in red, along with per-row status detail.

Validation does not check whether referenced attachments exist; only the import step verifies attachments against the ZIP contents, so rows referencing missing files will fail at the import stage rather than the validation stage. The attachment match is performed by basename only, meaning nested folder structures inside the ZIP are flattened. All imported contracts are stamped with the importing admin's username as submitted_by.

Summary for Trainers

Five of the seven workflows in this guide are fully end-to-end with notifications, audit logging, and validation: submission, status updates, reviewer assignment, amendments, and batch import. Two require explicit reframing during training.

Redaction is a “bring your own redacted PDF” workflow rather than an in-portal tool, so trainers should pair this section with a brief Acrobat or Foxit demonstration. **Delegation** is queue-level rather than per-contract, so any reference to “selecting a contract to delegate” should be cut from supporting materials before distribution.

The portal also exposes several adjacent features not covered here, including the Approval Chain workflow, the Expiring Contracts and Escalations dashboards, the admin Onboard wizard, the per-contract Discussion thread, the Calendar view, and the SFTP Export route, all of which warrant their own training sections in a complete guide.