



UNIVERSITY
OF MIAMI



CONGA USER GUIDE

Contract Approvers

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Accessing Conga Contracts

Conga Contracts is a secured network application that runs in an Internet browser (Chrome, Internet Explorer 9.0 (or higher), Mozilla Firefox and Safari). To open Conga Contracts, go to conga.miami.edu, or click on the 'Go to Contracts' link in the email notification you received from Conga regarding your approval step.

Access to Conga Contracts is customized for each User. You will see only the records that are relevant to you and your role in the contracting process. Please contact your System Administrator if you have any questions regarding your access to the system.

UM Contract Processes

A Contract Process in Conga is a series of pre-defined, standardized steps that ensure all contracts are being processed in the same manner. This standardization ensures that University of Miami (UM) employees follow all the proper policies and procedures for contracts and gives UM the ability to report on key data and metrics.

UM has four unique Contract Processes during which department approvals may be required:

1. Contract Administration (Business Services) Contract Process—for contract requests submitted to the Contract Administration team
2. General Counsel Contract Process— for contract requests submitted to General Counsel's office
3. Privacy Contract Process— for Business Associate Agreements and Data Processing Addendums submitted to the UHealth Supply Chain Services team and the Contract Administration team, respectively
4. Procurement Contract Process— for contract requests submitted to the Purchasing and Supply Chain Services teams

Contract Process Participants

Who participates in a contract process?

1. **Contract Requestor** – individual at UM who completes and submits a request for a contract.
2. **Contract Owner** – individual in one of the Central Contracting Units who is responsible for managing all activities related to processing a contract.
3. **Contract Admin** – individual in one of the Central Contracting Units who is responsible for managing all activities related to processing a contract (in certain circumstances) and who supports Contract Owners
4. **Department Head Approver** (*participates outside the system*) – individual who approves a contract when requested to do so, when required, by a Contract Owner.
5. **Approver/Reviewer** – individual who approves a contract during the contracting process; approvals are triggered automatically due to a specific response to a request form question or they are requested specifically by Contract Owners.
6. **Final Approver** – individual who approves a contract at the end of the contracting process prior to obtaining signatures.

Contract Process Stages

Although each UM Contract Process is unique, they all generally consist of the following stages (not necessarily in this order):

1. Contract Request
2. Contract Request Acceptance/Approval
3. Pre-Contract Activities (including Department Head Approval)
4. Automatic Approvals
5. Additional Approvals/Reviews
6. Contract Drafting/Review
7. Negotiation
8. Final Approval
9. COI Requirements
10. Signature and Finalization

Throughout the Contract Process there may be slight variations to the stages listed above and the steps within a specific stage. **However, if you are a participant in the process and an approval step has been assigned to you, you will receive an email notification from Conga Contracts Flow or from the Contract Owner.** Watch out for these notifications and use both the *Go to Contract* link in the email and the *Active Workflow Items* Portlet on your Conga dashboard to proactively manage and action your steps.

Contract Process Diagram



Approving a Contract

During the contracting process, you may receive an email notification from Conga Contracts or from a Contract Owner to approve a contract. **Approval Steps** are either automatically sent from the system (i.e., from Conga Contracts Flow) or are sent by a Contract Owner through the Conga Messaging tool.

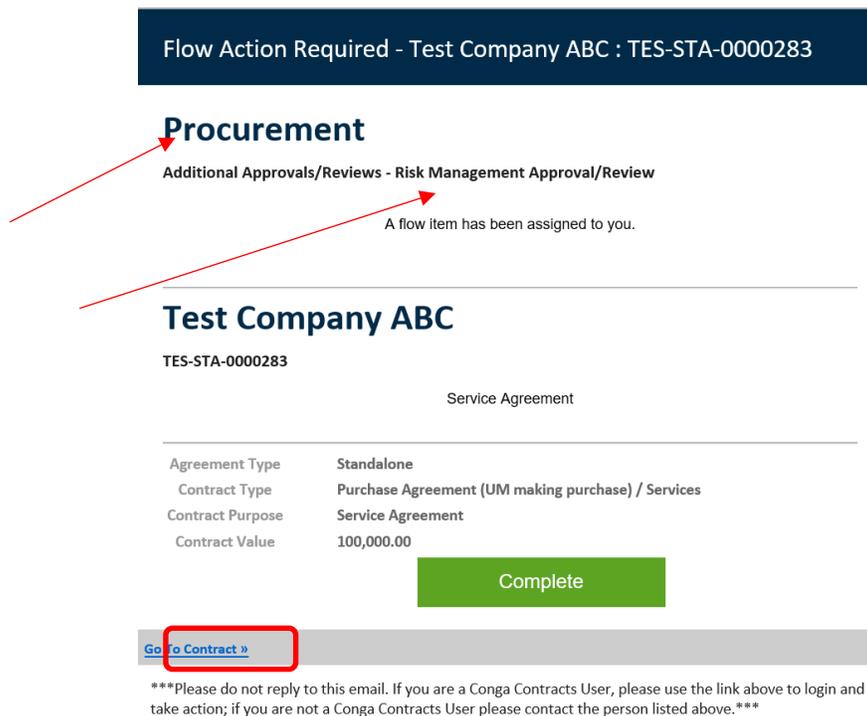
System (Contract Flow) Approval Steps

There are two types of system-generated Approval Steps: Completion and Approve/Decline.

- A **Completion Step** requires that you review the contract and provide input/feedback. All your feedback should be provided as redlines or comments inside the document.
- An **Approve/Decline Step** requires that you review the contract and either approve or decline. When you approve, the process moves forward. When you decline, the process routes back to the Contract Owner to determine next steps.

Completion Step (Complete Step button)

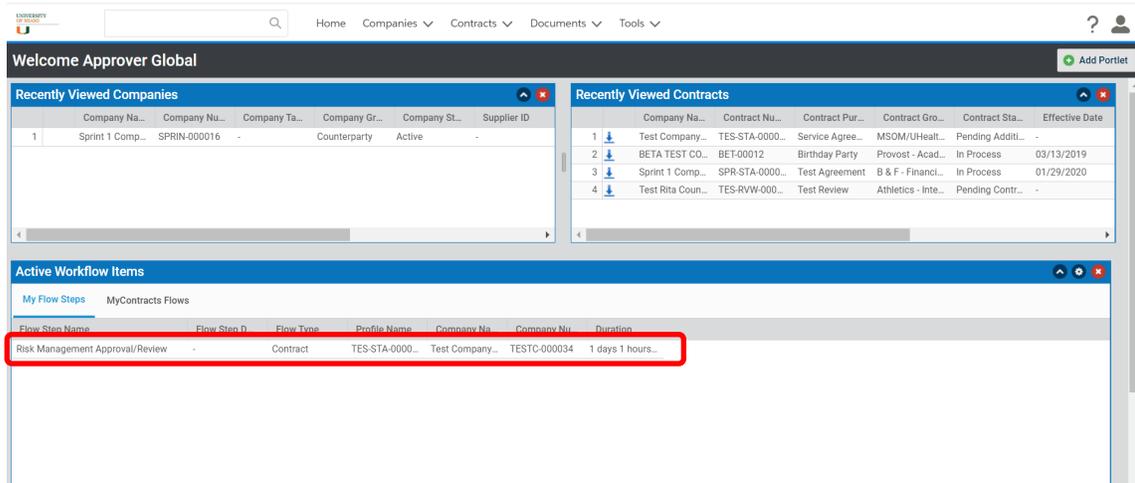
1. Below is an example of a **Completion Step** email notification from Conga Contracts Flow during the Procurement contracts process.
2. Click on the **Go to Contract** link at the bottom of the email to go to the contract in Conga Contracts.



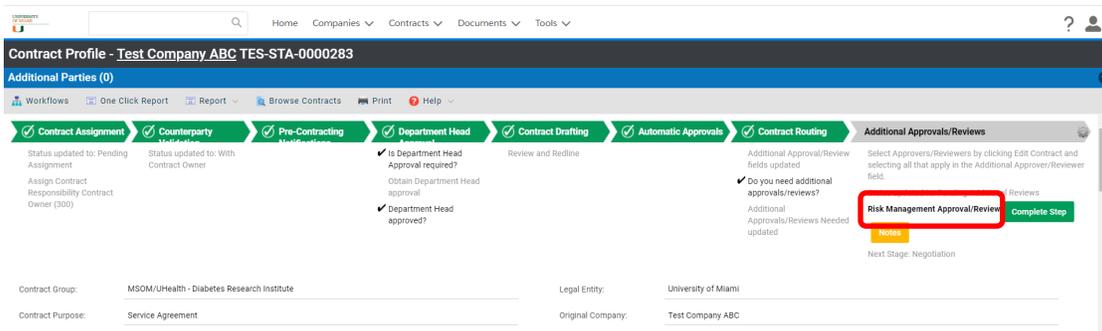
Flow Title/Name

Approval/Review Type

CRITICAL TIP: If the email notification has gotten buried or you cannot locate it, but you know you have an approval that is pending, you can also access the contract by opening Conga Contracts through this link: conga.miami.edu and viewing your **Active Workflow Items** portlet. Once you have located the step in **My Flow Steps**, click on it to navigate to the Contract Profile.

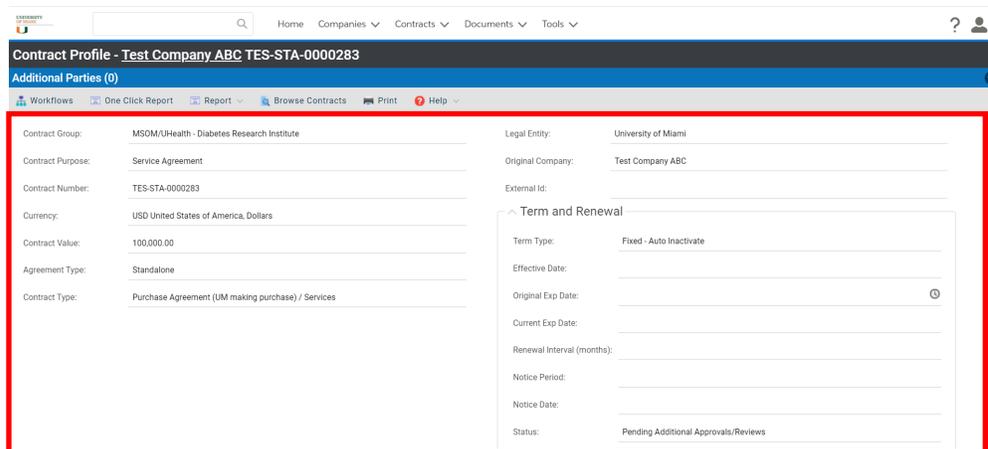


- The Contract Process (Flow) is visible across the top of the Contract Profile and your step is in bold under the current stage (e.g., Risk Management Approval).

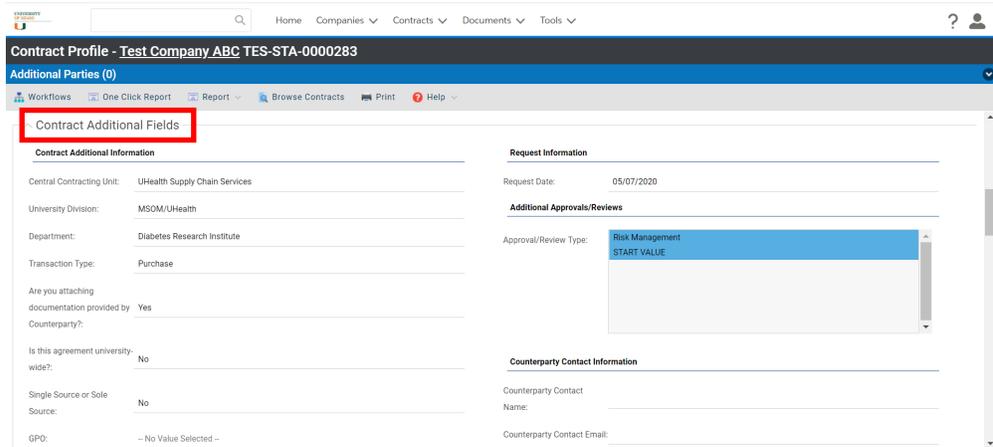


- To conduct your review of the contract, scroll through the **Contract Profile** to review all contract data and scroll down to the **Documents Link** to access the contract and any related documents.
 - Contract data is located in the Contract Profile, in Contract Additional Fields and in additional forms in the Additional Forms Link.

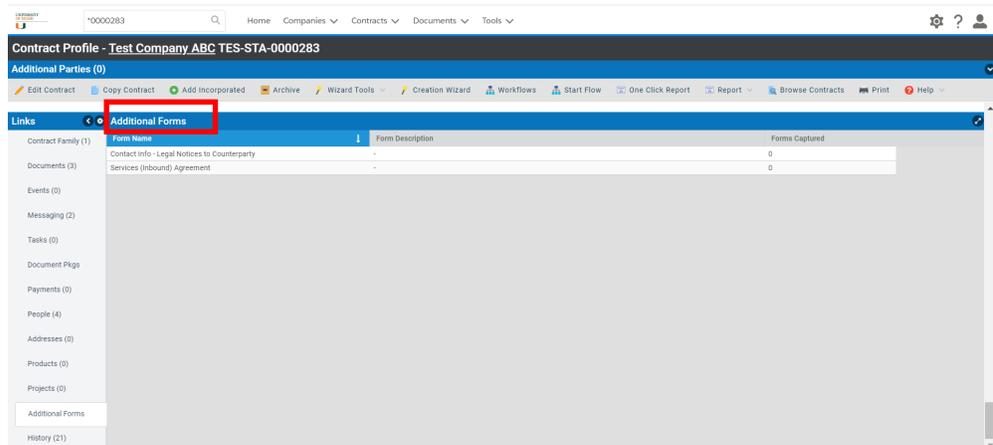
i. Contract Profile



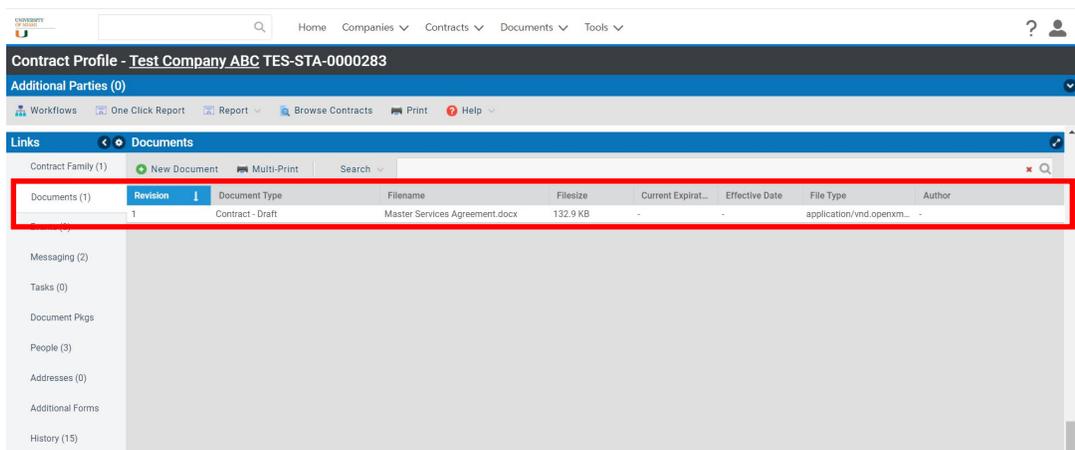
ii. Contract Additional Fields



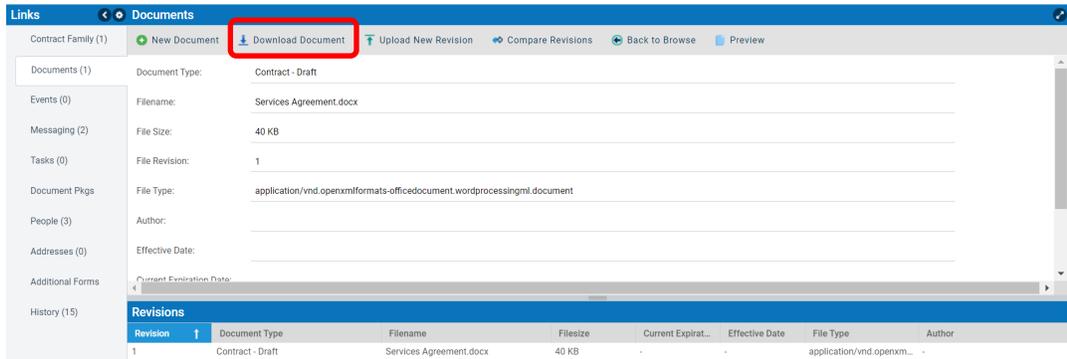
iii. Additional Forms



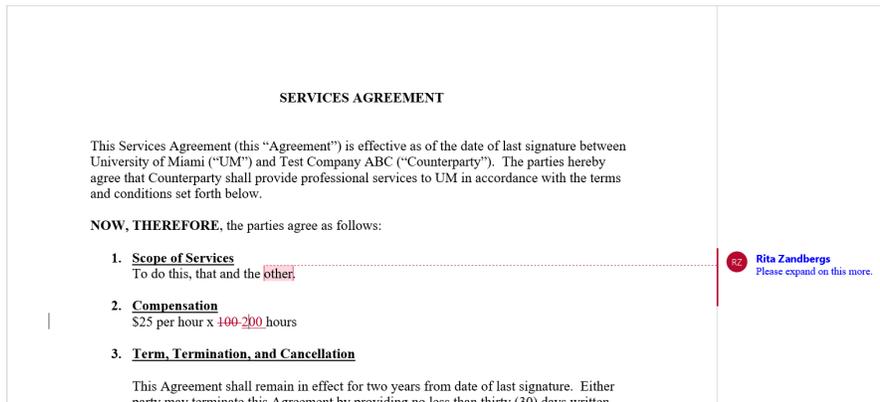
b. The contract document is located in the **Documents Link** on the Contract Profile.



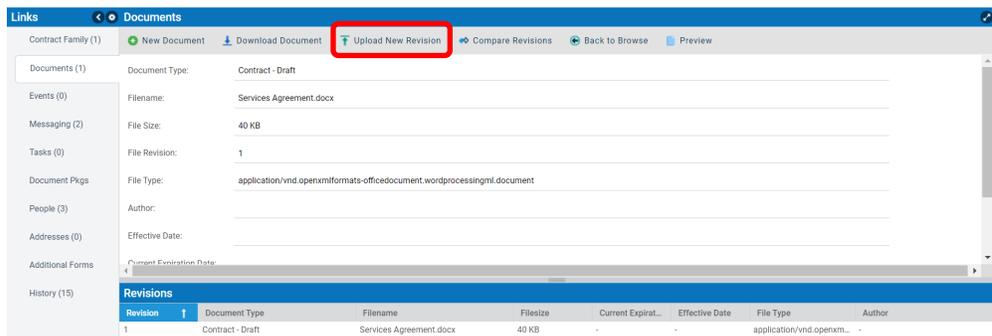
- i. To view the document, click on the Document record, and click **Download Document**.



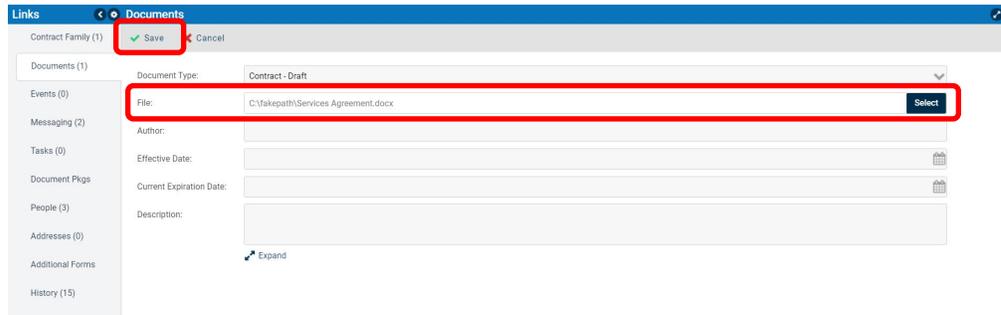
- ii. Add your comments and edits inside the document and save it locally on your computer.



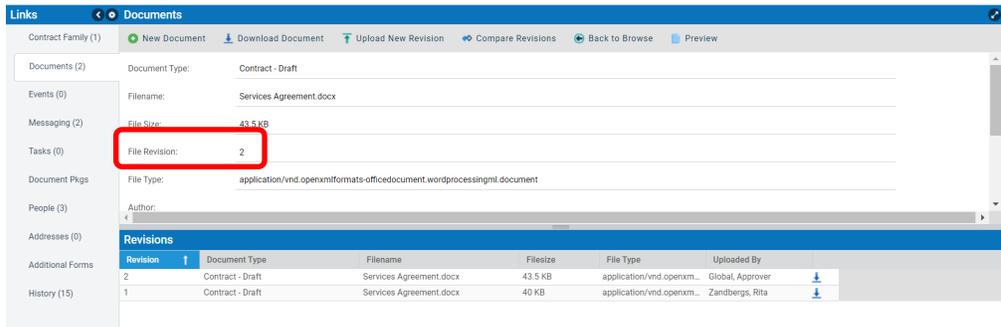
- iii. When you have completed your review, go back to Conga and click on the **Upload New Revision** button.



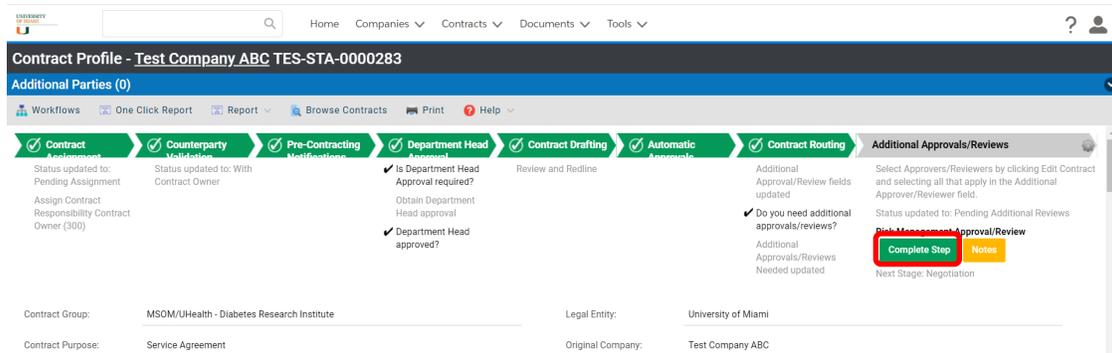
- iv. **Select** the file from your computer and click **Save**.



i. Your revision is saved and given the next revision number.



5. Scroll back up to the top of the Contract Profile and click **Complete Step**.



6. Your approval/review is complete, and the flow has moved forward to the next step.

Approve/Decline Step (Approve/Decline buttons)

1. Below is an example of an Approve/Decline Step email notification from Conga Contracts Flow during the Procurement contracts process.
2. Click on the **Go to Contract** link at the bottom of the email to go to the contract in Conga Contracts.

Flow Action Required - Test Company ABC : TES-STA-0000283

Procurement

Contract Approvals (UHealth) - Manager Approval

A flow item has been assigned to you.

Test Company ABC

TES-STA-0000283

Service Agreement

Agreement Type	Standalone
Contract Type	Purchase Agreement (UM making purchase) / Services
Contract Purpose	Service Agreement
Contract Value	100,000.00

Approve

Decline

[Go To Contract »](#)

If you are a Conga Contracts User, please use the link above to login and take action or reply to this email; if you are not a Conga Contracts User please contact the person listed above.**

Flow Title/Name

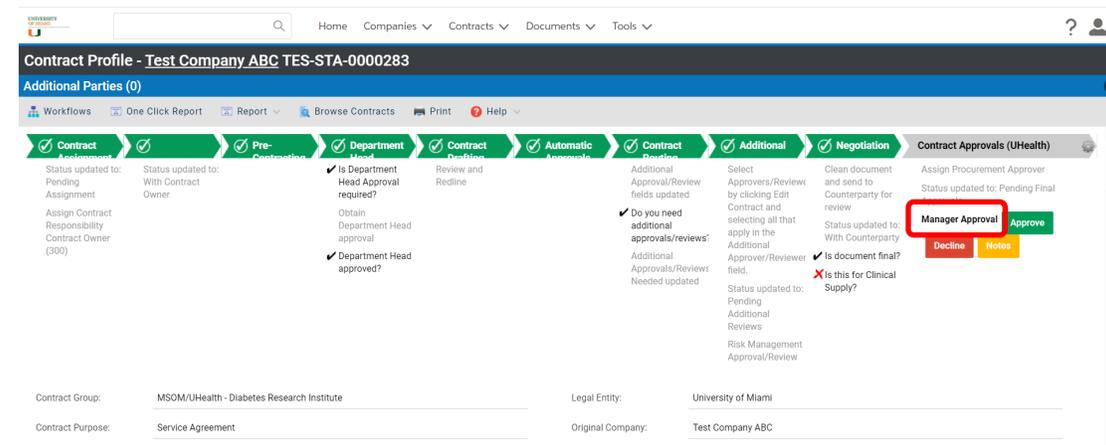
Final Approval Type

CRITICAL TIP: If the email notification has gotten buried or you cannot locate it, but you know you have an approval that is pending, you can also access the contract by opening Conga Contracts through this link: conga.miami.edu and viewing your **Active Workflow Items** portlet. Once you have located the step in **My Flow Steps**, click on it to navigate to the Contract Profile.

The screenshot shows the Conga Contracts user interface. At the top, there is a navigation bar with 'Home', 'Companies', 'Contracts', 'Documents', and 'Tools'. Below this is a 'Welcome Approver Global' header. The main content area is divided into three portlets: 'Recently Viewed Companies', 'Recently Viewed Contracts', and 'Active Workflow Items'. The 'Active Workflow Items' portlet is expanded to show 'My Flow Steps'. A table lists the flow steps, with the 'Manager Approval' step highlighted by a red box. The table has columns for 'Flow Step Name', 'Flow Step D.', 'Flow Type', 'Profile Name', 'Company Na.', 'Company Nu.', and 'Duration'.

Flow Step Name	Flow Step D.	Flow Type	Profile Name	Company Na.	Company Nu.	Duration
Manager Approval	-	Contract	TES-STA-0000...	Test Company...	TESTC-000034	2 minutes 57 s...

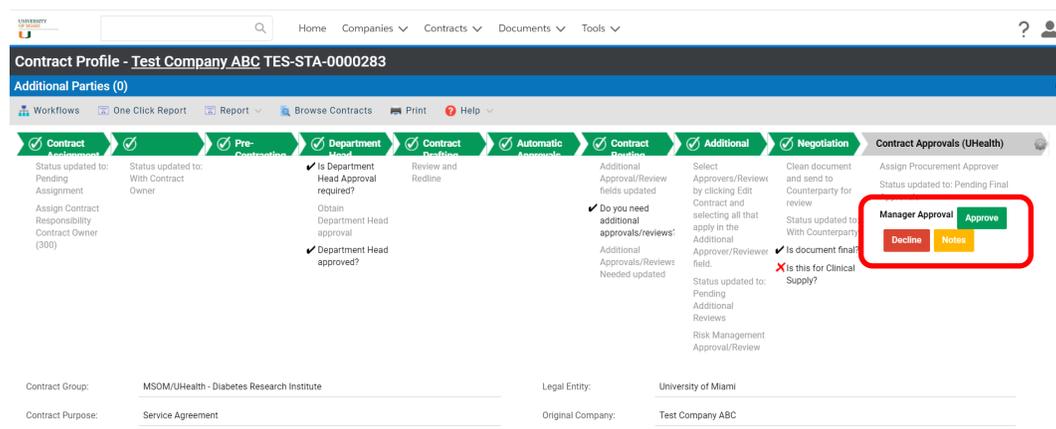
- The Contract Process (Flow) is visible across the top of the Contract Profile and your step is in bold under the current stage (e.g., Manager Approval).



4. If you need to review the contract and metadata, scroll through the **Contract Profile** to review all contract data and scroll down to the **Documents Link** to access the contract and any related documents.
 - a. Contract data is in the Contract Profile, in Contract Additional Fields and in additional forms in the Additional Forms Link.
 - b. The contract and any other related documents are in the Documents Link.

CRITICAL TIP: Use the **Notes** button to capture key information about the current step (e.g., why you are answering a certain way) prior to answering a question, clicking Approve/Decline or clicking Complete Step. Notes are captured in the Flow Activity Grid.

5. Scroll back up to the top of the Contract Profile and click either Approve or Decline.
 - a. Clicking **Approve** moves the process forward either to the next approver, if applicable based on Contract Value, or to the next stage, Signatures and Finalization.
 - b. Clicking **Decline** sends the process back to the Contract Owner to evaluate whether to negotiate or end the process.

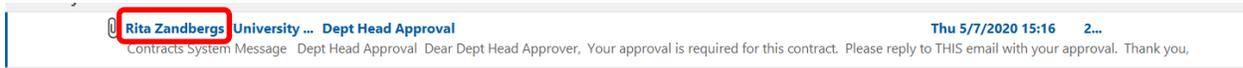


Messaging Tool Approvals

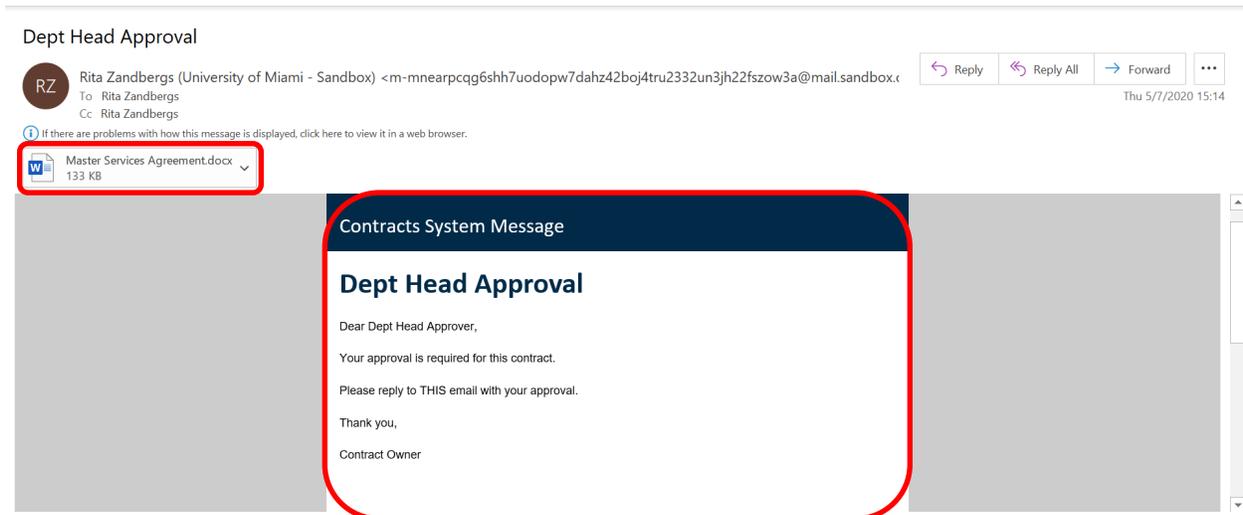
Messaging is a tool in Conga Contracts that allows a user to send an email notification from a record in Conga to anyone inside or outside UM. The tool allows both parties to reply and communicate back and

forth through email, however, each reply is captured back in Conga in the relevant contract record. This ensures that critical communications are captured in Conga for audit purposes.

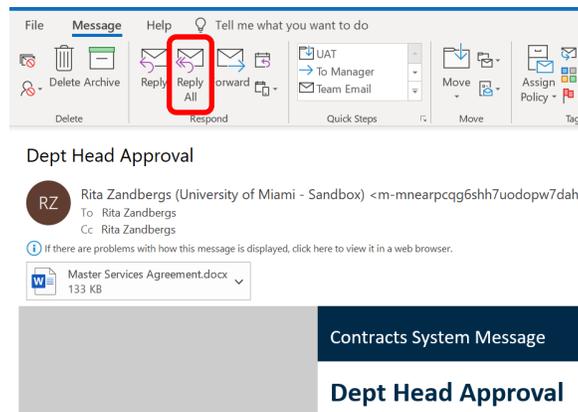
1. A **Messaging message** comes from the user who sends it.



2. The body of the message is inside the **Contracts System Message** box. If there is a document attached, you may download and review it.



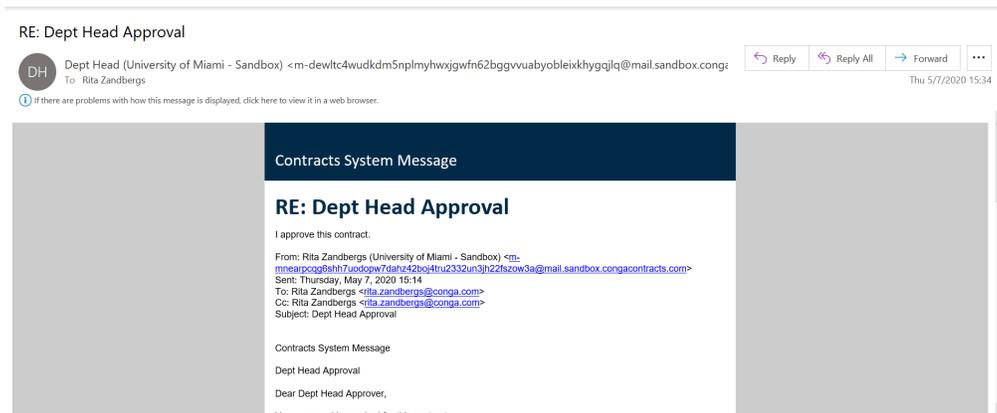
3. When you are ready to reply, click **Reply All** to ensure your message is sent into the system as well as to the Sender's (Contract Owner's) email.



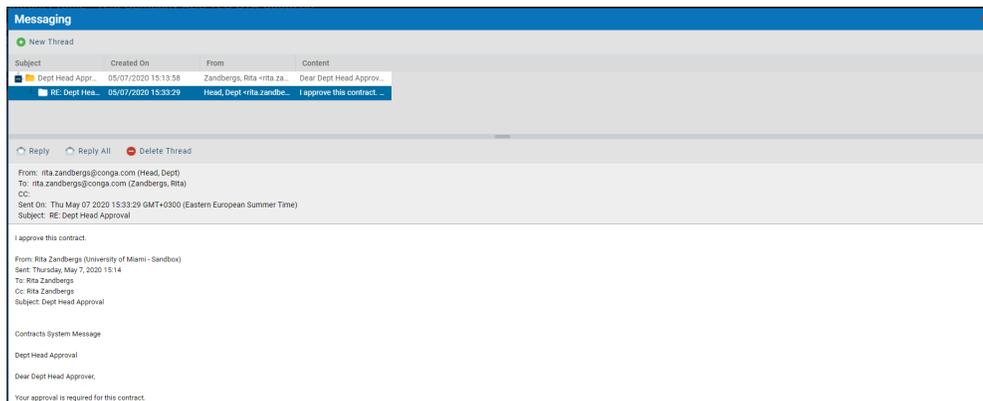
4. Write your message to either approve or decline and click **Send**.



5. Your reply is sent to the Contract Owner through email.



6. Your reply is also captured back in Conga Contracts.



7. Once you have replied to the Messaging message, your participation is complete. The Contract Owner will register your response (i.e., approve or decline) in the contract profile.

Help

Please contact your System Administrator or refer to the Conga Contracts Help section for more comprehensive and detailed instructions on all Conga Contracts features and functionality. Click on the Question Mark (?) in the top right corner of the Conga Dashboard to access Help and navigate to Conga Support.

The screenshot displays the 'Contract Profile' for 'Test Company ABC TES-STA-0000283'. The interface includes a navigation menu with 'Home', 'Companies', 'Contracts', 'Documents', and 'Tools'. Below the header, there are utility buttons for 'Workflows', 'One Click Report', 'Report', 'Browse Contracts', 'Print', and 'Help'. The main content area features a progress bar with the following stages:

- Contract Assignment:** Status updated to: Pending Assignment. Action: Assign Contract Responsibility Contract Owner (300).
- Counterparty:** Status updated to: With Contract Owner.
- Pre-Contracting:** (Current stage)
- Department Head:**
 - Is Department Head Approval required? (checked)
 - Obtain Department Head approval
 - Department Head approved? (checked)
- Contract Drafting:** Review and Redline
- Automatic Approvals:** (Completed)
- Contract Routing:**
 - Additional Approval/Review fields updated
 - Do you need additional approvals/reviews? (checked)
 - Additional Approvals/Reviews Needed updated
- Additional Approvals/Reviews:**
 - Select Approvers/Reviewers by clicking Edit Contract and selecting all that apply in the Additional Approver/Reviewer field.
 - Status updated to: Pending Additional Reviews
 - Risk Management Approval/Review (Completed Step)
 - Notes
 - Next Stage: Negotiation