



## **TCM: Review Rounds**

The Review Rounds feature allows you to send a contract through multiple rounds of review by internal or external users before it is approved. Single or multiple reviewers can be selected for each review round.

Review rounds occur while the contract is in **Draft** status. Each time a contract is submitted for review it is considered one review round. If there are multiple reviewers, the review round is considered complete when the last reviewer is done.

### **Sections**

There are internal and external review rounds:

- A. Internal Review Round
- B. External Review Round
- C. Review a Contract (Internal Reviewer)

#### **A. Internal Review Round**

The **Manual Internal Review Round** option allows contract managers and administrators to send a contract to selected internal users for review before it is approved. Contract managers need to create a manual review round and assign reviewers each time they send a contract for review. This is the standard option available for all systems.

## STEPS

1. Navigate to **Contracts > Contracts > Search Contracts** (or **Contracts Home** if you have the appropriate permissions).

Contract Search Results

1-1 of 1 Results

**Contract Details**

**PUR-00605**  
Home Depot

Second Party: HOME DEPOT      Start Date: 1/30/2020      Version Type: Original  
 Contract Type: Purchase of Goods or Services      End Date: 3/30/2020      Renewal No.: 0  
 Status: **Draft**      Active for Shopping: No      Amendment No.: 0  
 Extension Count: 0

1-1 of 1 Results

2. Search for and open the **contract** you want reviewed.

**PUR-00605**  
Home Depot

Checked out To: You  
Type: Purchase of Goods or Services  
2nd Party: HOME DEPOT  
Dates: 1/30/2020 - 3/30/2020  
Version: Renewal 0, Amendment 0  
Total Contract Value (TCV): 0.00 USD

**Contract Header**

Contract Number: PUR-00605  
Contract Name: Home Depot  
Contract Type: Purchase of Goods or Services  
Work Group: Procurement  
Summary: test

Parent Contract: Type to filter...  
Use eSignature for this contract?  Yes  No  
Show on Supplier Portal:  Yes  No  Inherit From General Contract Settings -- Current Setting: No  
Value: 0.00

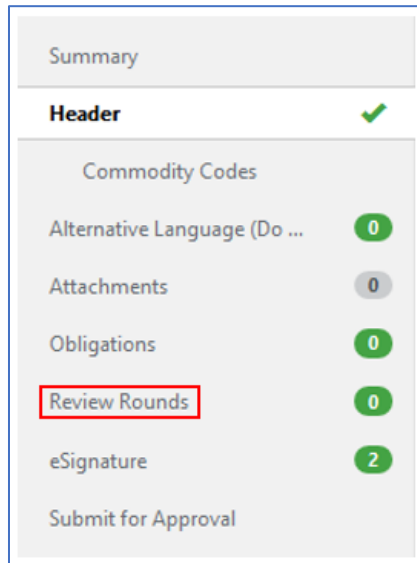
**Contract Parties**

Name	Currently Visible	Type	Contact	Contract Address
The Florida International University Board of Trustees		First Party (Primary)	Heve Menyonga	-
HOME DEPOT	✗	Supplier Name (Primary)	-	-

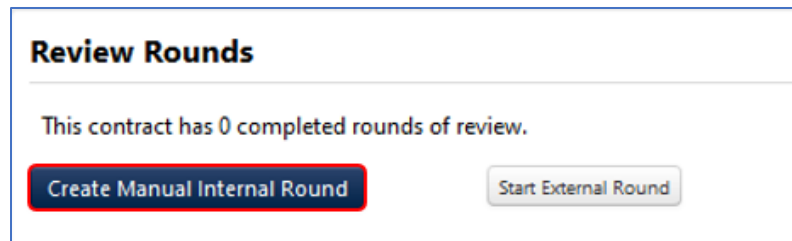
**Dates and Renewal**

Start Date: 01/30/2020 10:10 AM  
 Update Start Date Upon Execution  
 End Date: 03/30/2020 11:59 PM  
 Expires On  No Expiration  
 Number of Renewal Options:   
 Renewal Term:    
 Auto-Renew:  Yes  No

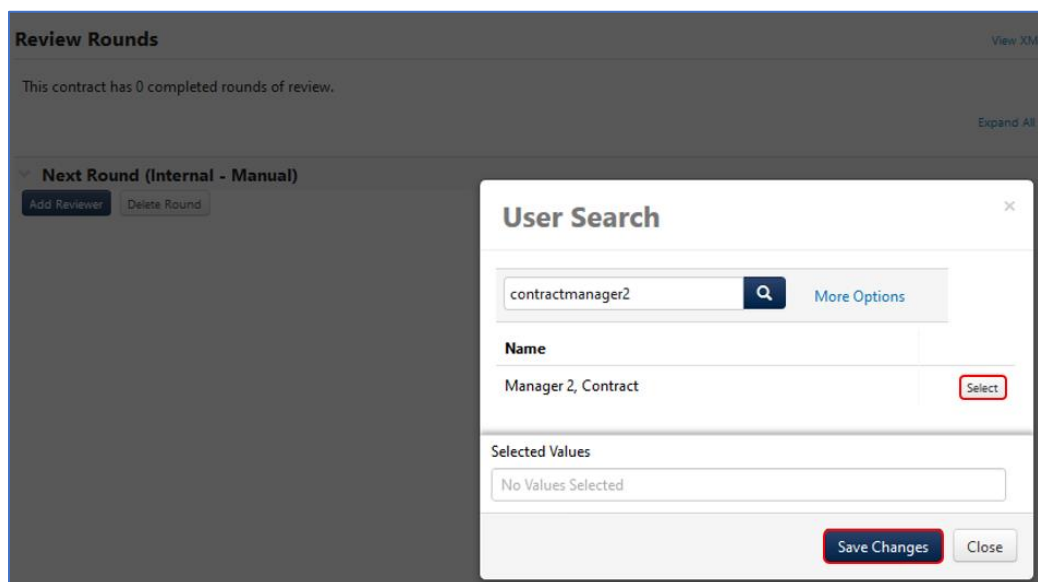
3. In the left menu, select **Review Rounds**.



4. Click **Create Manual Internal Round**



5. Click **Add Reviewer**. The User Search window opens.



- Search for and select the **internal users** who you want to review the contract and click **Save Changes**. The selected reviewers are displayed with the status "Not Sent" under the subheading Next Round (Internal - Manual).

**Review Rounds** [View XML](#) | [History](#) | [?](#)

This contract has 0 completed rounds of review. [Expand All](#) | [Collapse All](#)

▼ **Next Round (Internal - Manual)**

[Add Reviewer](#) [Begin Round](#) ▼

Status	Reviewer	Email	Phone Number	
<b>Not Sent</b>	Manager 2, Contract	Contractmanager@fiu.edu	-	<a href="#">Delete</a>

- Click **Begin Round**. The Begin Internal Review window opens and shows who has been selected for review.

**Review Rounds** [View XML](#) | [History](#) | [?](#)

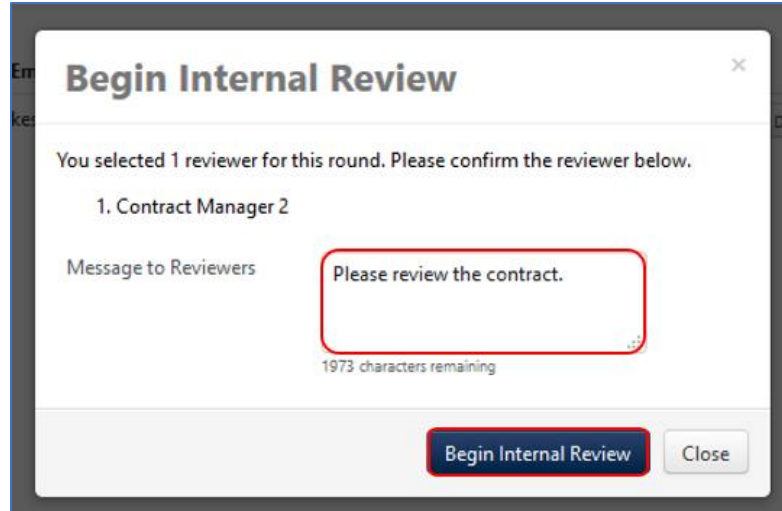
This contract has 0 completed rounds of review. [Expand All](#) | [Collapse All](#)

▼ **Next Round (Internal - Manual)**

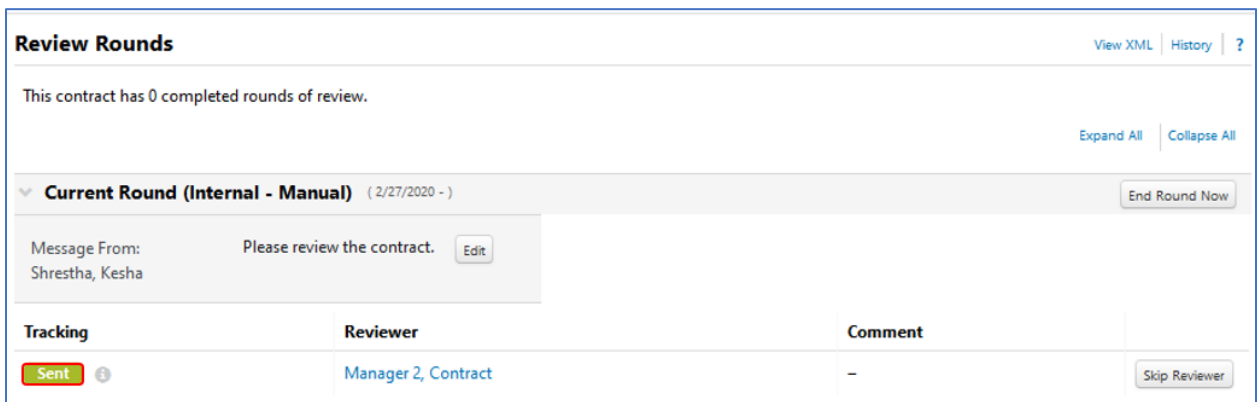
[Add Reviewer](#) [Begin Round](#) ▼

Status	Reviewer	Email	Phone Number	
<b>Not Sent</b>	Manager 2, Contract	Contractmanager@fiu.edu	-	<a href="#">Delete</a>

- Enter a message in the **Message to Reviewers** field regarding the review round or leave the field blank. The message is visible to all reviewers on the round. Click the **Begin Internal Review** button to send the contract out for review.



9. A status of "**Sent**" appears next to the internal reviewers on the Review Rounds page. Reviewers will receive a notification or an email indicating that there is a contract to review.



10. View details about the round under the Current **Round (Internal - Manual)** subheading on the Review Rounds page. As each reviewer completes their review, the status **Done** is displayed next to their name. Click the information icon next to a status to view details.

**Review Rounds**

This contract has 1 completed round of review.

▼ **Round #1 (Internal - Manual)** ( 2/27/2020 - 2/27/2020 )

Message From: Shrestha, Kesha      Please review the contract.

Tracking	Reviewer	Comment
<input type="button" value="Done"/> ⓘ	<a href="#">Manager 2, Contract</a>	Done with the Review.

- (optional) Once a review round has started, you can change the message, skip a reviewer, or end the round early:

## B. External Review Round

The External Review Round feature allows contract managers and administrators to send a contract to reviewers outside of Contracts+.

Contract managers manage the external review process by sending an email to external reviewers with the contract attached and making changes to the contract on their behalf. Emails that are sent and received during an external review round are recorded and monitored in the contract's Communication Center. See user guide for Communication Center for more information.

### STEPS

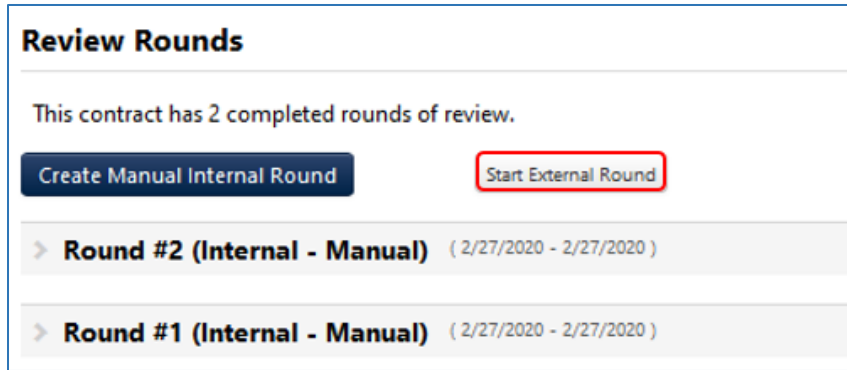
1. Navigate to **Contracts > Contracts > Search Contracts** (or **Contracts Home** if you have the appropriate permissions).

The screenshot shows the 'Search Contracts' interface. On the left, the 'Search Details' panel includes search terms (Contract Number: 605), filters (By Start/End Date: All), and active status (All). The main area displays 'Contract Search Results' for 'PUR-00605' (Home Depot). Contract details include: Second Party: HOME DEPOT, Start Date: 1/30/2020, Version Type: Original, Contract Type: Purchase of Goods or Services, End Date: 3/30/2020, Renewal No.: 0, Status: Draft, Active for Shopping: No, Amendment No.: 0, and Extension Count: 0.

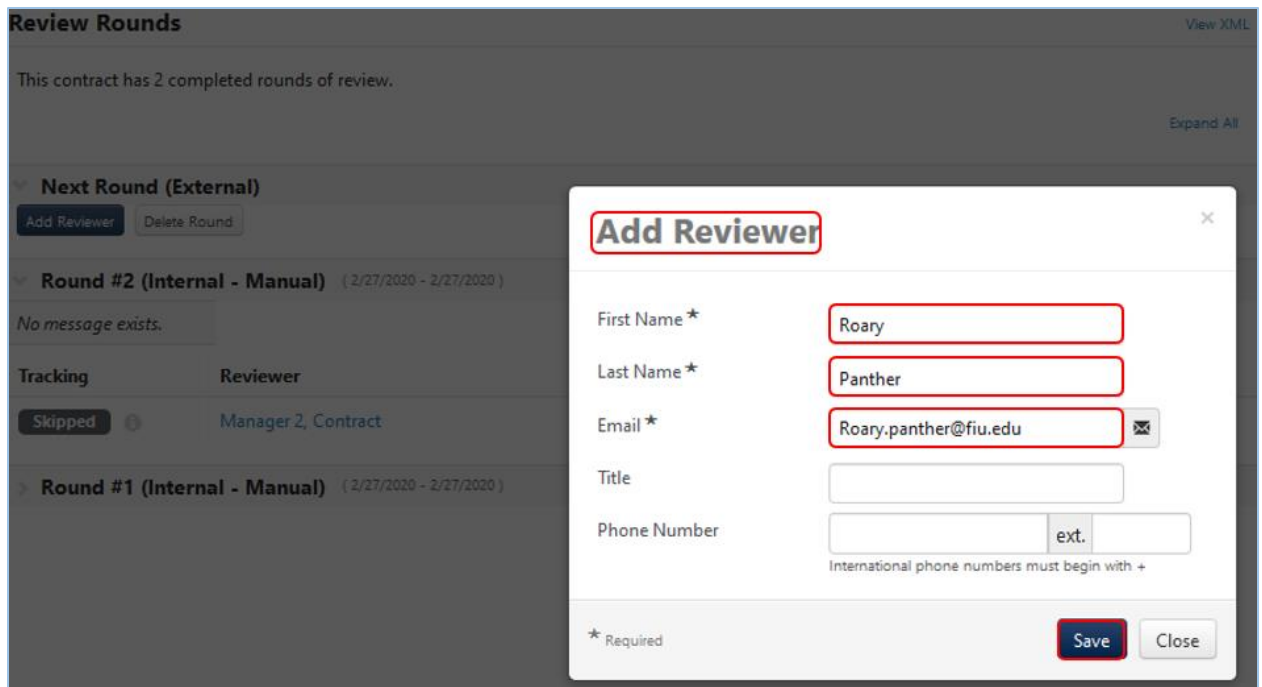
2. Search for and open the **contract** you want reviewed.

The screenshot shows the 'Contract Header' page for contract 'PUR-00605' (Home Depot). The contract is in 'Draft' status. Key details include: Contract Number: PUR-00605, Contract Name: Home Depot, Contract Type: Purchase of Goods or Services, Work Group: Procurement, Summary: test, and Value: 0.00. The 'Contract Parties' table lists 'The Florida International University Board of Trustees' as the First Party (Primary), with contact 'Herve Menyonga' and contract address '-'. A left sidebar shows contract metadata like 'Checked out To: You', 'Type: Purchase of Goods or Services', 'Dates: 1/30/2020 - 3/30/2020', and 'Total Contract Value (TCV): 0.00 USD'.

3. In the left menu, select **Review Rounds** and click **Start External Round**.



- In the Add Reviewer window, enter **contact information** for the external reviewer, and click **Save**.



- Click **Begin Round**.



**Review Rounds** View XML | History | ?

This contract has 2 completed rounds of review.

[Expand All](#) | [Collapse All](#)

**Next Round (External)**

[Add Reviewer](#) [Begin Round](#)

Status	Reviewer	Email	Title	Phone Number	Actions
<b>Not Sent</b>	Panther, Roary	Roary.panther@fiu.edu	-	-	<a href="#">Edit Properties</a>

- A Begin Round of External Review window opens where you complete the information that you want to send in the email to the external reviewer. And click **Send Email**.

**Begin Round of External Review**

Email one or more external reviewers to start the round.

Maximum message size limit is 10000 KB.

**Recipients**

Recipients \*  Roary Panther

**Attachments**

Indicate which attachments you would like to include in the email.

<input checked="" type="checkbox"/>	Attachment	Size	Full Contract PDF
<input checked="" type="checkbox"/>	SampleIndependentContractorAgreementFinal.docx 📄	29 KB	✔

Include Full Contract PDF ⓘ

**Email Content**

Customize your email below:

From Name \*

From Email \*

Reply To Email \*

Subject \*

Right click on placeholders to edit or remove them.

Body \*

Size - **B** *I* U ~~S~~ ~~x~~ ~~x~~ **A** **A**

*I* U ~~S~~ ~~x~~ ~~x~~ **A** **A** Placeholders

Dear **External Review Participant name**

This email is to inform you that **The contract name**, contract **The contract number**, is available for your review. For your convenience, the contract documentation has been attached to this email.

**Contract Link Attachments**

Thank You,

\* Required [Send Email](#) [Close](#)

7. A status of "Sent" or "Not Sent" appears next to the external reviewer.

**External Review** This round of review includes 1 external reviewer. [Manage this Round.](#)  
This contract must be in a Fully Executed status before it can be made active for shopping.

**PUR-00605**  
Home Depot

Type: Purchase of Goods or Services  
2nd Party: HOME DEPOT  
Dates: 1/30/2020 - 3/30/2020  
Version: Renewal 0, Amendment 0

Total Contract Value (TCV)  
TCV: 0.00 USD

> Lifetime Spend (USD)

Summary

Header

Commodity Codes

Alternative Language (Do ... 0)

**Review Rounds** [View XML](#) | [History](#) | ?

This contract has 2 completed rounds of review.

[Expand All](#) | [Collapse All](#)

▼ **Current Round (External)** ( 2/27/2020 - ) [End Round Now](#)

Tracking	Reviewer	Comment	Actions
Sent	Panther, Roary	-	Actions

> **Round #2 (Internal - Manual)** ( 2/27/2020 - 2/27/2020 )

> **Round #1 (Internal - Manual)** ( 2/27/2020 - 2/27/2020 )

**Important Note:** Emails sent during an **external review round** are visible to all recipients of the email and anyone who can access the Communication Center page of a contract. The information displayed includes email recipient names and email addresses, the original email text, and all replies to the email.

**PUR-00605**  
Home Depot

Type: Purchase of Goods or Services  
2nd Party: HOME DEPOT  
Dates: 1/30/2020 - 3/30/2020  
Version: Renewal 0, Amendment 0

Total Contract Value (TCV)  
TCV: 0.00 USD

> Lifetime Spend (USD)

Summary

**Communication Center** [View XML](#) | [History](#) | ?

Internal (0) **External (1)**

[Start External Communication](#)

Conversation	Conversation Started	Messages	Last Updated
UIT-Home Depot contract has been forwarded to you [myFIUmarket System Administrator] De...	2/27/2020 at 10:32 AM By Keshha Shrestha	2	2/27/2020 at 10:40 AM By Roary Panther

8. (optional) Once a review round has started, the following options are available to contract managers:
- Click **Actions > Skip Reviewer** to move the review round to the next reviewer on the list. A status of "Skipped" will appear next to the current reviewer's name.
  - Click **End Round Now** to end the review round early and skip any reviewers who are not done. The Tracking column will display "Skipped" on manual or external review rounds.

**Review Rounds** View XML | History | ?

This contract has 2 completed rounds of review. Expand All | Collapse All

▼ **Current Round (External)** ( 2/27/2020 - ) End Round Now

Tracking	Reviewer	Comment	Actions
Sent ⓘ	Panther, Roary	-	Actions ▼

> **Round #2 (Internal - Manual)** ( 2/27/2020 - 2/27/2020 )  
 > **Round #1 (Internal - Manual)** ( 2/27/2020 - 2/27/2020 )

The 'Actions' dropdown menu is open, showing the following options:

- Done with Review
- Check Out
- Email Reviewer
- Skip Reviewer
- Open Main Document
- Download Full Contract as PDF

9. Once an external reviewer has replied to your email, make changes to the contract on their behalf, and move their reviewer's status to **Done** for that review round by completing these steps:

- In the **Review Rounds** screen, open the external review round and click **Actions > Done with Review**.
- Enter notes about the review and click **Done with Review**.

**Done with Review** [Close]

Please enter a review comment for the Contract Manager \*

Reviewed by External Contacts.

970 characters remaining

\* Required Done with Review Close

10. Once all reviewers have a status of **Done**, the review round will close, and the contract returns to **Draft** status. A number is assigned to the round and details can be viewed by expanding the appropriate heading.

### C. Review a Contract (Internal Reviewer)

Depending on your user preferences, contracts that have been sent to you for review appear under **Action Items > Contracts to Review**, and/or **Notifications > Contract Ready for Internal Review**, or you may also receive an email notification with links to the contract.

#### STEPS

1. Click the links provided in your email notification or open the contract to review by selecting **Action Items > Contracts to Review**, or **Notifications > Contract Ready for Internal Review**, or A list of contracts that need to be reviewed or the contract that you selected to review opens, depending on your method of access.



2. If you accessed Action Items or Notifications, click on the **contract number** of the contract you want to review to open the contract.

**Internal Review** You are a reviewer. You can check out the contract to make changes, then [finish your review](#). This contract must be in a Fully Executed status before it can be made active for shopping. Contract Actions

**PUR-00605**  
Home Depot

Type: Purchase of Goods or Services  
2nd Party: HOME DEPOT  
Dates: 1/30/2020 - 3/30/2020  
Version: Renewal 0, Amendment 0

**Total Contract Value (TCV)**  
TCV: 0.00 USD  
[Lifetime Spend \(USD\)](#)

**Summary**

Header	Status
Header	✓
Commodity Codes	
Alternative Language (Do ...)	0
Attachments	0

**Contract Summary** History ?

**Header**

Contract Name *	Home Depot
Contract Type	Purchase of Goods or Services
Work Group *	Procurement
First Party *	The Florida International University Board of Trustees
Supplier Name *	HOME DEPOT
Summary *	test

**Dates And Renewal**

Start Date	1/30/2020 10:10 AM EST
Update Start Date Upon Execution	✗
End Date	3/30/2020 11:59 PM EST
Auto-Renew	✗

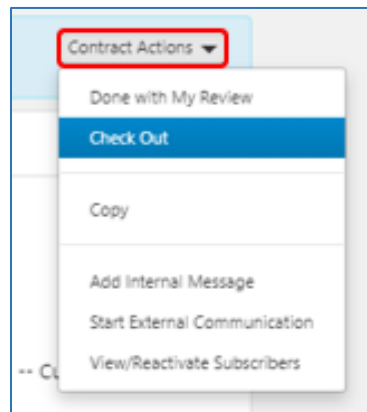
**Contract Managers**

Kesha Shrestha	<a href="mailto:keshrest@fiu.edu">keshrest@fiu.edu</a>
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**Additional Details**

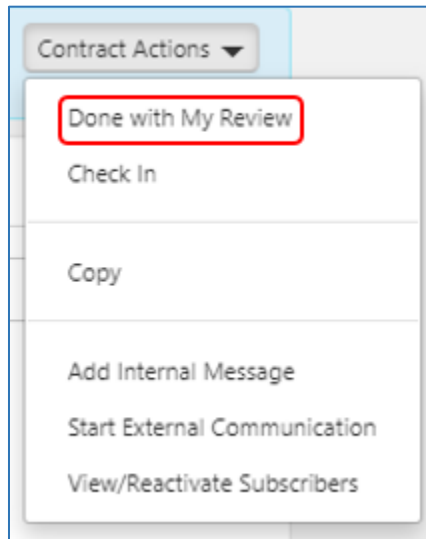
**Attachments**

- (optional) View **messages** from the contract manager regarding the round by clicking **Review Rounds** in the left menu and expanding the round you are in. Messages from the contract manager are displayed underneath the round heading and may change if the contract manager makes updates to comments while you are reviewing the contract.
- Review the contract. To make changes, check out the contract to make modifications and check it back in once your changes have been made. You may also need to upload attachments or new versions of attachments during your review.

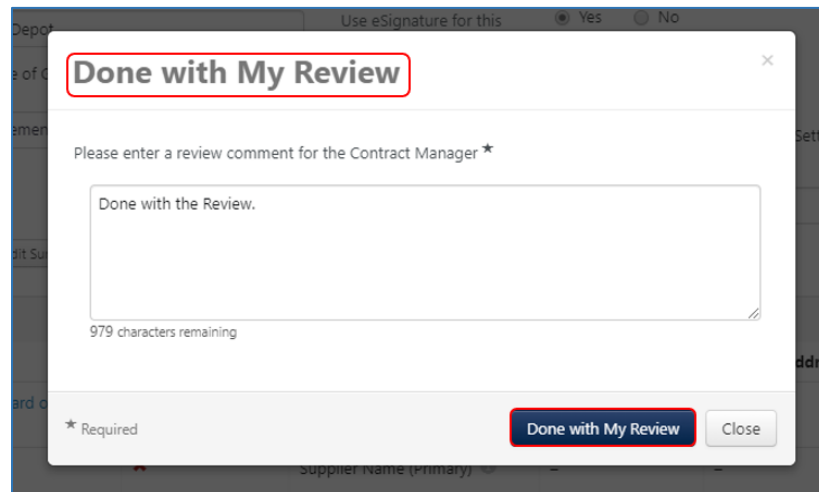


- Once you have completed your review, select **Done with My Review** using one of the following options:
  - Click the **Contract Actions** menu and select **Done with My Review**.

- Click **Review Rounds** in the left menu and select **Actions > Done with My Review** to the right of your name within the current round's table.



6. In the **Done with My Review** window, enter **notes** about the review in the comment field. These are displayed in the information table on the round. Click the **Done with My Review** button.



7. Once all reviewers are done, the status of the contract returns to **Draft** status and the contract can no longer be accessed by internal reviewers who are not a contract manager or administrator.