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](image1)

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

![Contract Details](image2)
3. In the left menu, select **Review Rounds**.

4. Click **Create Manual Internal Round**

5. Click **Add Reviewer**. The User Search window opens.
6. 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 Table]

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

![Review Rounds Table]

8. 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.
11. (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).

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

   3. In the left menu, select Review Rounds and click Start External Round.
4. In the Add Reviewer window, enter **contact information** for the external reviewer, and click **Save**.

5. Click **Begin Round**.
6. 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.
7. A status of "Sent" or "Not Sent" appears next to the external reviewer.

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.

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.
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**.

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.

   ![Email Notification Example]

   Dear Contract Manager 2,
   Contract No. PUR-00605 is now ready for your review. Use the link below to access the contract within the application as appropriate.
   View Contract
   Thank You,
   FIU Procurement Services Contract Team

2. If you accessed Action Items or Notifications, click on the **contract number** of the contract you want to review to open the contract.
3. (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.

4. 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.

5. 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.

![Contract Actions](image)

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.

![Done with My Review](image)

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.