ONESolution users,

The user guide and some of the other documentation for the Contract module in ONESolution has been updated and has been posted to the ONESolution information page. The highlighted documents have been updated:

- **Contracts Information**
  - **Business Process Information**
    - **Contract Management Business Process**
    - **CAL End User Checklist – Expenditure Agreements**
    - **CAL End User Checklist – Revenue Agreements**
    - **Workflow Chart**
  - **User Guides and Addenda**
    - **Contract Management Entry**
    - **Contract Management CAL Sec Descriptions**

As you know, there were several glitches with the contract workflow process. We have implemented a new version of the workflow for initial approvals as well as amendment approvals. The new workflow was made active on September 4. Any new contracts entered into the Contract Module will move through the workflow process correctly. For other items (CAL items or other items that entered a workflow prior to September 4), please use the following guidelines and instructions to ensure your contract is approved and processed correctly:

If the item was loaded into the system as a CAL contract and has never gone through a workflow approval process:

1. Add Current End Date

Begin Dt	09/02/2015 ▼
Current End Dt	06/30/2016 ▼

2. Edit description (this **must** be done even if it is a slight change)

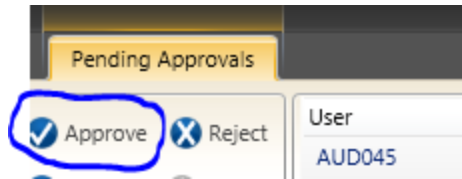| Desc	Lease for New Phone System FY2016

3. Select CAL from User 2 drop down menu

| User 2	CAL ▼ Continuing Agreements List
tract Adm	<none>
	CAL Continuing Agreements List
	NA Not Applicable

4. Save the Contract

5. Approve the item to initiate the approval process

■ If a paper ADM-29 has already been created, users should add the date they first approved the item in the comments field of the Pending Tasks pop-up window. This will show up on the ADM-29 CDD report.


■
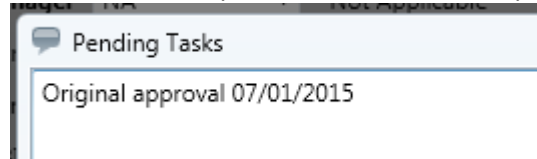
6. When the Clerk of the Board adds the BOS Aprov Date, the workflow will not retrigger.
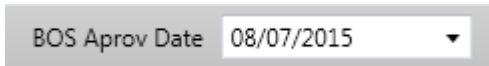
If the contract entered a workflow prior to September 4th (New contracts or CAL contracts)

1. Look at the pending approvals tab of the Contract. You will know a Contract is in a Workflow because there are approvals listed.

2. If the first approval was done prior to 9/4/2015, the contract is in an old, incorrect version of the workflow. Items in old versions of the workflow will often loop back to the contract initiator when the Board Clerk adds the BOS Approval Date to the contract.
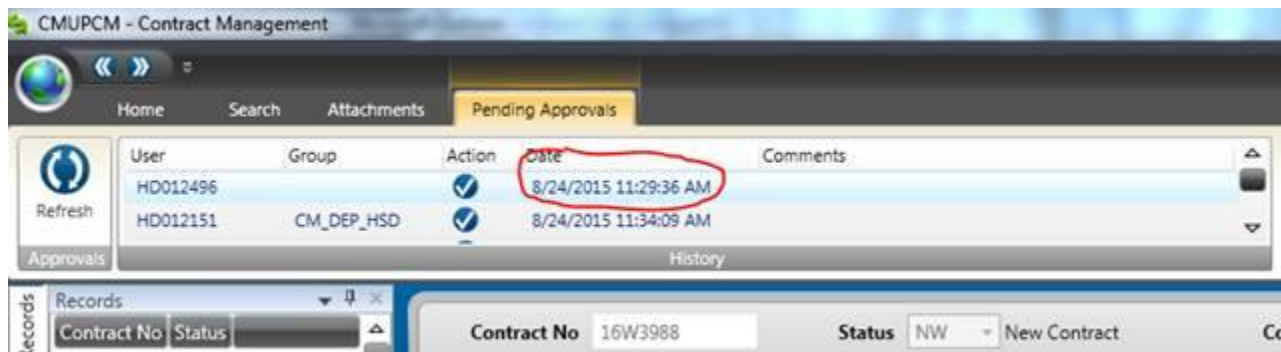
You may also see multiple version of the workflow listed in the Pending Approvals tab. Contract Status Approval - 12 and Contract Amendment Approval - 11 are old, incorrect versions of the workflow.
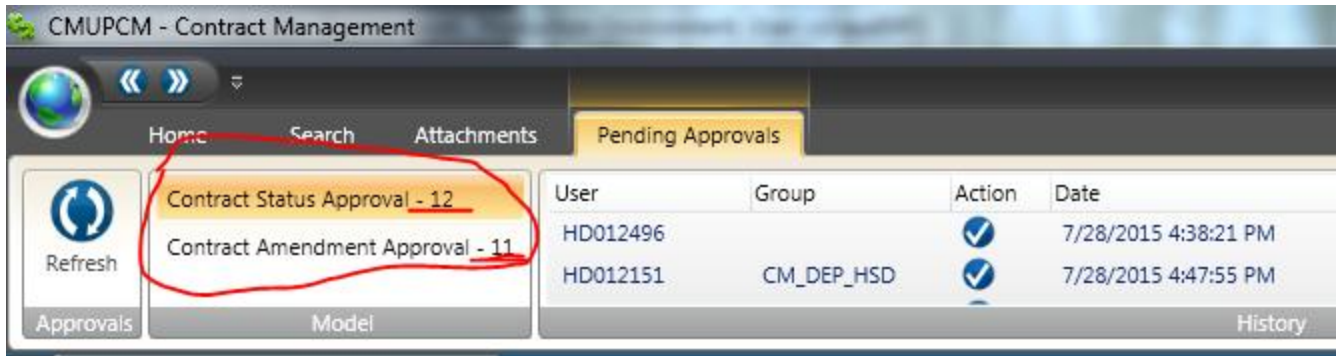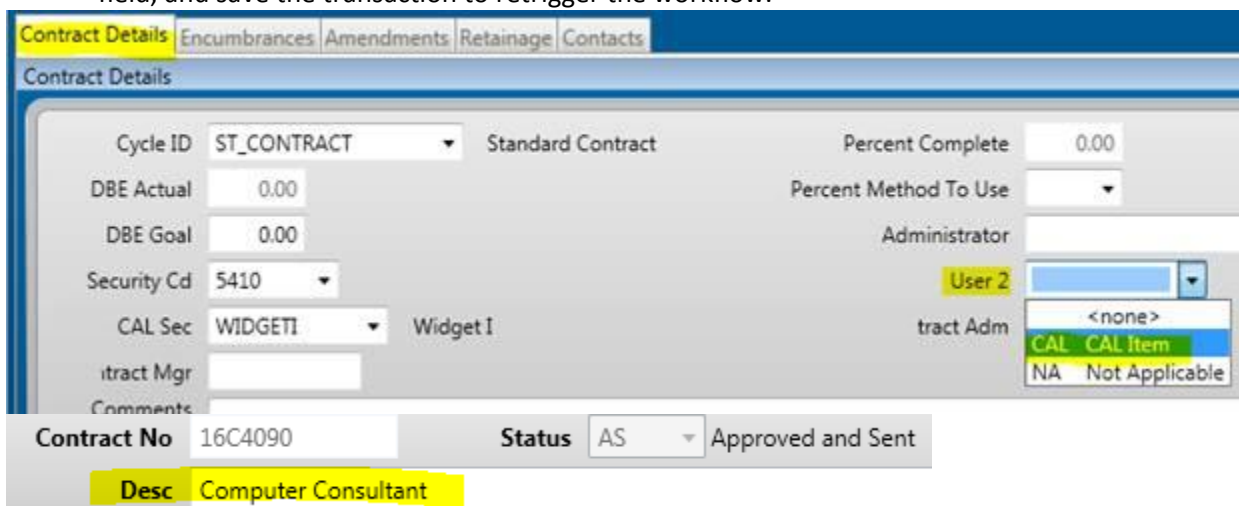
Contract Status Approval - 15 and Contract Amendment Approval – 15 are the new, corrected versions of the workflow. If you see an old version of the workflow and a new version of the workflow, only do the approval on the new version of the workflow.

3. If the contract is in an old, incorrect version of the workflow, the workflow for the item needs to be retriggered.

    - For CAL items, select CAL from the User 2 drop down, make a small change to the description field, and save the transaction to retrigger the workflow.

- Items that are not CAL items should be rejected from the old workflow, a change should be made in the description field of the contract, and the contract should be saved. This will retrigger the new version of the workflow.

Please contact audonesolution@santacruzcounty.us if you have any questions about this.

Thank you,

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