Contents

Introduction to Accela Contract Routing

Accela & **DigEPlan** are used to route and sign all City contracts except those signed by City Purchasing. (See purchasing guidelines and this chart.)

Accela is a software application that tracks a "workflow" – the steps it takes to get the contract signed. This allows the contract to move efficiently from one department to the next.

Accela is NOT a storage site for signed contracts, or a searchable database of all City contracts. Accela tracks the City's signature and approval workflow and makes contract signing easier.

The standard workflow to sign City contracts starts with the City Clerk and ends with the Mayor. (there are steps after the Mayor's signature but the Mayor is the final *signer*.)

Custom Workflows: for contracts where the final signer is somebody other than the mayor – there are custom workflows in Accela: Metro bus ads and commute cards, real estate documents, employment contracts, labor contracts, and all Public Health (PHMDC) contracts. The rare paper contract can also be tracked in Accela, as can contracts when the state or federal government require Docusign or other online signature portals. See the "Custom Workflow" section.

DigEPlan is a software application that creates a digital signature, allowing people to electronically sign a contract using the Accela workflow. There is no need to download, sign, save, or resend the contract. **DigEPlan** keeps track of who signed, when, and saves the signatures so they cannot be altered. **DigEPlan** is not available for contractors / other parties – only City signers.

Remember – contracts that can be **signed by City Purchasing are not routed in Accela** – they are processed and signed in **Munis**.

Technical Questions? Email ElamSupport@cityofmadison.com (IT's Application Development team support mailbox)

Process or Legal Questions? First, read this guide. Then, you can contact Lara Mainella at lmainella@cityofmadison.com or via Teams, or check with the Assistant City Attorney assigned to your agency.

FAQ:

Q: Can I change the order or skip a department in the workflow? No. Most contracts will use the "standard" workflow that starts with the clerk and ends with the mayor. (Mayor is final signer.) See the "custom" workflows for specific contract types that do not follow the standard workflow.

Q: What if the other side wants to use Docusign or Adobe Sign? They can sign using one of those methods but must send us a regular Adobe PDF and we will sign using Accela / our own methods. (Exception – the State of Wisconsin – see instructions later in this guide.)

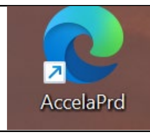
Q: Can I search Accela for a pending contract? Yes. From the Records page, select "Contracts" module, set My Filters to "Contract Routing-All" and click on "Search" button. Use

Project Number box to search by the contract record number. Example: for record ATSIGN-2025-00116 – search %116.

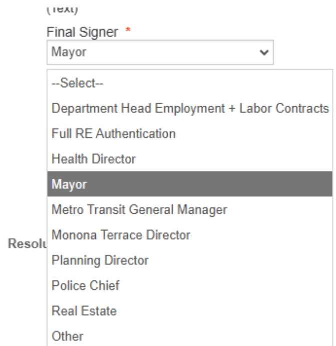
How to Enter a Contract for Routing in Accela

Create Contract Record

- The department/division who routes a contract is called the "Originating Agency"
- Make sure you have Accela installed on your workstation (Submit a Service Request)
- If working remote, make sure you are logged into the network via VPN.
- Log into Accela (click on Edge browser desktop icon labeled "AccelaPrd")

	"Agency" = Madison (not case-sensitive) Login = Use your City network user ID & network password

- Click on the "waffle" menu  then click the blue "**Create New Record**" button.
- In the resulting popup, select "Contract Routing" and then "Contract Signature Routing". This will enable a "Create Record" button at the bottom of the window – click this button.
- Fill out the resulting form as accurately as possible. *Asterisks indicate required fields.
    - For consistency, use the same name for "Business Name," "Contract Name" and "Document Name" fields. (Usually the contracting party, but if you make a lot of contracts with the same party, it's OK to use another unique name or number.)
    - In the **contract price** field, use only numbers, **no** punctuation or dollar signs.
    - If you have a contract where the other party signs last, note this in comments.
- Load the contract to be signed and any supporting documents:
    - The "Documents" field says "this section is not required" but this is where you attach your contract and any supporting documents. Click the "**Add**" button.
    - **The PDF file name for the contract and supporting docs** must have fewer than 40 characters, no punctuation, no complex or long file names, or it will be rejected! (commas, semi-colons, %, or very long file names will cause a malfunction.)
- Under "Contract Details" select the **correct Final Signer:**
    - Most City contracts are signed by the Clerk and Mayor - select "Mayor."
    - **Custom Routing**: If you are authorized to use a custom workflow, select the appropriate workflow in the "Final Signer" dropdown:



- Click "Submit" to create the record. After you select "Submit" you can close the window, or to be taken to the new record, click "View Summary".

To Begin Contract Routing:

- Select "Record" in the "Record" page. This will bring up record details in a new tab.
- Select the "Workflow" tab on the left side, within the record details.
    - The "standard" (Mayor) routing workflow looks like this:

- Click on "Originating Agency" step – outlined in orange to indicate that step is "in progress"
- Under the "New Status" dropdown menu, select "**Begin Routing**"
- Click the "**Submit**" button on the upper left hand side of the menu buttons above – this sends an email to the first agency on the workflow to begin the review and approval process.

To Edit the Contract Record / Details:

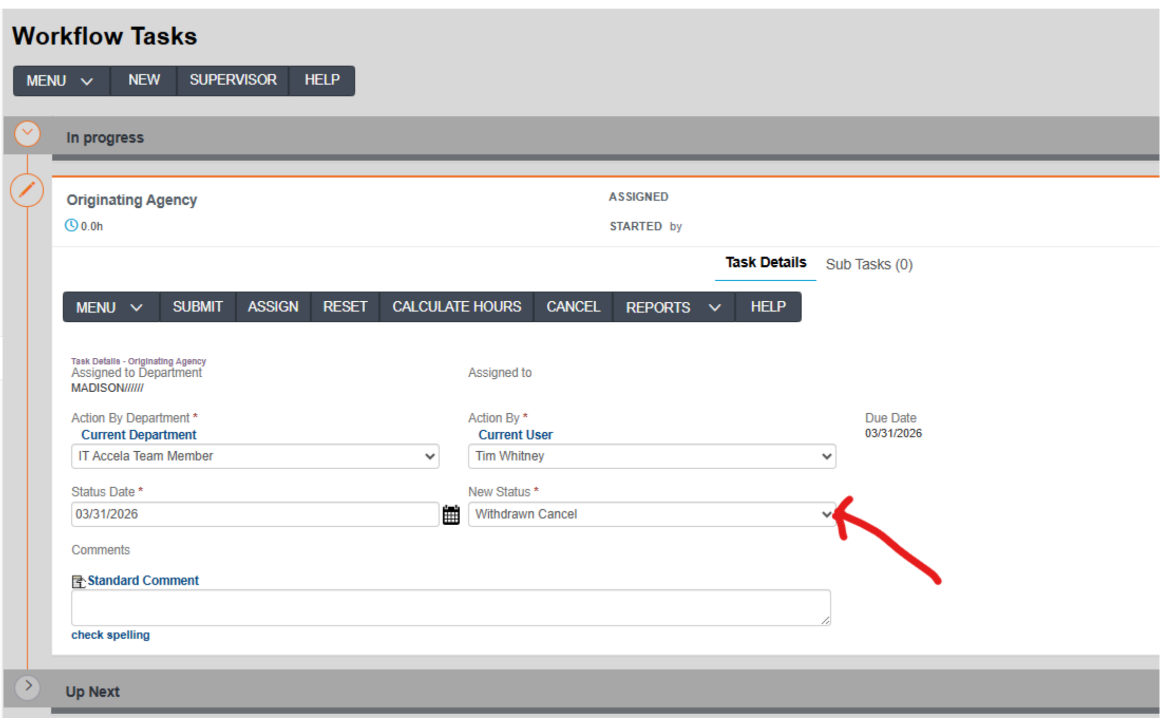
- Select the contract record within the "Record" page.
    - This will bring up the record details in a new tab.

- Update information within the "Record" and "Contract Details" tabs.
- Click the "Save" button to save your changes.

To Withdraw / Cancel the Routing of a Contract:

- Select the contract's "Record" page. This will bring up record details in a new tab.
- Navigate to the "Workflow" tab.
- Click on the active workflow – the agency with the active task is outlined in **orange** and shown as "In progress."
    - If you are the OA and need to cancel, you can do this from any workflow step. This will remove the contract from all workflows/reviewers.
    - Under the "New Status" drop down, select "Withdrawn Cancel" and hit "Submit"
- (If you just need to remove the contract and replace it with a different document, that's a different process - see City Attorney's Office for instructions. Requires a Digeplan license.)

This screenshot shows the workflow - it is with the OA. You can withdraw from here or from any step along the workflow that is in progress (highlighted in orange.)



While your contract is being routed

- You can check the status by logging into Accela and locating your contract on the "Record" page. The status of the record will be displayed in the "Status" column in the records list.
- Common Statuses:
    - *Additional Info Required* – you will receive an email with a comment entered in the "Standard Comment" field. Follow the instructions / answer the question.

        - Your reply all on that email will be sent back to the commenter

  - *Review in Progress* - No action taken. This just tells you the review is underway.
  - *Reject/Redraft* – This means a reviewer or signer has sent the contract back to you (originating agency.) You will receive specific instructions from the reviewing agency that rejected your contract. If you need to **replace** or correct the contract, consult the City Attorney's office for instructions. You must remove the old one.

After the contract is signed – important final steps for Originating Agency:

- Once the Mayor (or other final signer) has signed, separate emails are automatically sent to Finance, City Clerk and you - the originating agency. (Custom workflows may be different.)
- As the Originating Agency –download the final signed contract & share a copy of the signed contract with the contracting party. Here's how:
  - Do this in the Accela "documents" tab. Make sure to select "**Approved-Pending**" version of the contract with all of the signatures. Ignore the unsigned version.
    - If there is not a version labeled "Approved-Pending" reach out to the final signer and ask them to "flatten" the contract.
  - If you're expecting a Purchase Order (PO), Finance will attach it as a "supporting document" and you can get this in the approved documents tab as well.
- Go to the "Workflow" tab in the contract record details in Accela and change "New Status" to "**Complete**." Click the "**Submit**" button to save the completed status.

How to Review a Contract - for staff who **review** the contract (all workflows)

- You will receive an email when the contract is ready for you to review.
    - You can also check the "My Tasks" area and refresh this page throughout the day.
- From an email, follow the "Link to Accela contract workflow" to open the Contract Record.
- Click on the "Documents" tab in the contract record.
    - Check the box and select Download to open the Contract.
    - Review the contract
- Go to the "Workflow" tab.
- Click on your agency's step in the "Workflow Tasks" list.
- Select the appropriate value in the "New Status" dropdown and click the "Submit" button.
    - Common status actions:
        - *Additional Info Required* - Send an email to the originating agency with the comment entered in the "Standard Comment" field.
            - As the originating agency, a reply all on that email will be sent back to the commenter
        - *Review in Progress* - No actions taken. Used to indicate the contract review is ongoing.
        - *Reject/Redraft - Sends the contract back to the originating agency*
        - *Approved* - this moves the contract to next step (varies based on agency – see next pages)
            - For agencies where one person **reviews** and another **signs**, the "approved" step forwards the contract to the signer
        - *Approved and Signed* - this moves contract to the next reviewing agency.
        - *Signed* –
            - for agencies where one person reviews and another signs, "Signed" moves the contract to the next reviewing agency

How to Sign a Contract – for staff who **sign** the contract (all workflows)

- You will receive an email when the contract is ready for your signature.
    - You can also check the "My Tasks" area and refresh this page throughout the day.
- From the email, follow the "Link to Document Review" to open the document.
    - This will open DigEPlan. Select the documents in the list on the left-hand side of the screen to open.
- Or select the contract record within the "Record" page.
    - Click on the Documents tab in the record.
    - Check the box next to the document that you wish to sign (or any document listed.)
    - Hover over the "Reports" button and select "Launch DigEPlan".
        - This will open a new window in DigEPlan where you will sign the documents.
    - Select the document (contract or signature page) from the list on the left-hand side of the screen.
        - This will bring up the document in a reading pane.
- Here, you can review the document. Once you are ready to sign, ensure the page you need to sign is on the screen and click the stamp icon in the toolbar at the top of the screen.
- In the resulting popup, select the appropriate signature format and click "next."
    - There are different signature and date formats to choose from, depending on how the signature lines are formatted in the contract you are signing.
    - If none of the pre-configured signature stamps fit, use the signature only stamp on the signature line and hand-enter the date by clicking on the **T** symbol in the tool bar (to the right of the stamp icon) and typing the date on the date line.
- The next screen is optional - it dictates where the stamp will initially show up on screen. **The signature will need to be dragged into position regardless of starting position.**
    - Select the center square to get the signature to show up in the center of the page.
- Click the "Insert Stamp" button.
- **Drag and resize the signature as needed. Drag the signature to the correct place. Hand-enter the date if necessary.**
- The document is automatically saved – but wait a minute.
    - Allow a moment for your signature to be saved before closing the window
- You can close out of the DigEPlan window.

Specific Agency sub-workflows

City Clerk – setting the classification in Digeplan

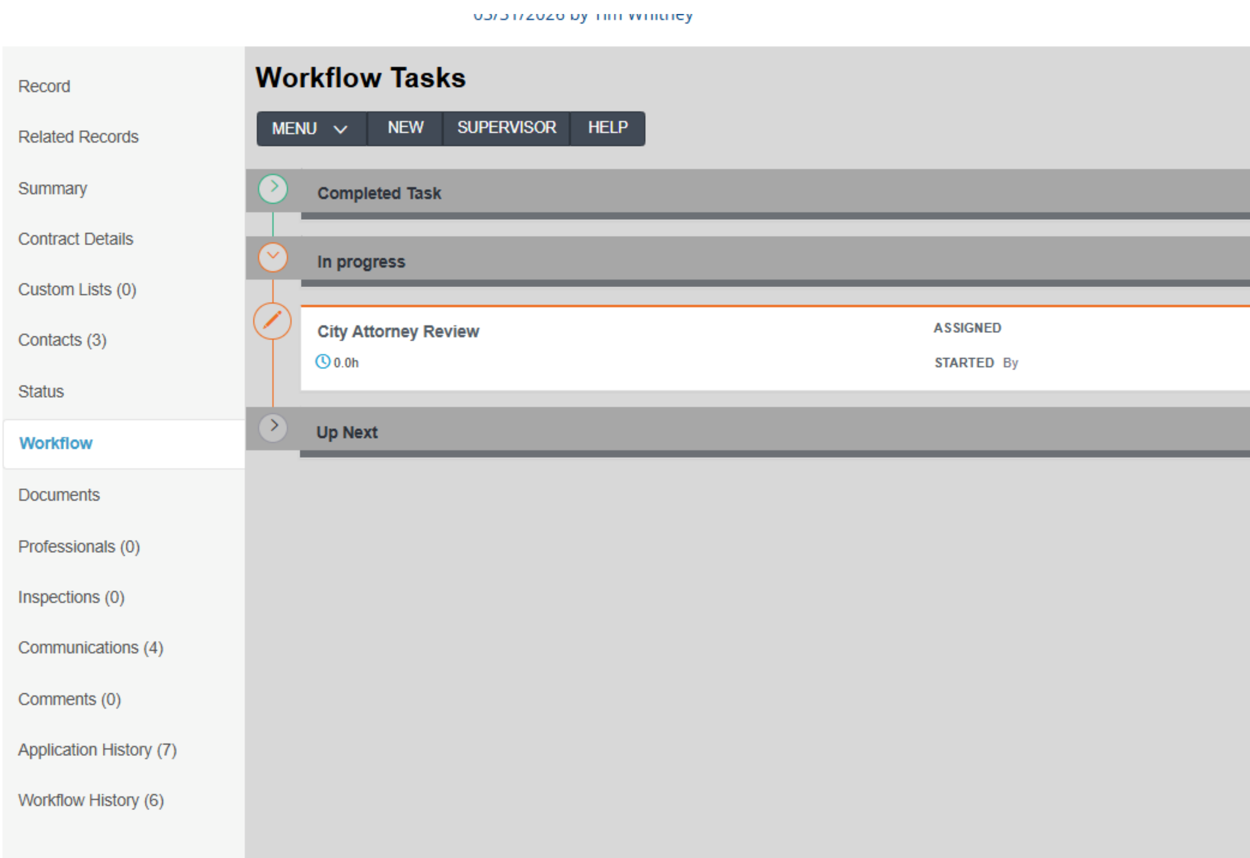
- When going through the signing steps above, you will have an additional step after opening the contract in DigEPlan.
- After opening the document, click the "Classification" button on the bottom of the screen.
- In the resulting popup, select "Document" and then click the "Save" button.
    - This should cause the red exclamation mark next to the "Classification" button to go away.
- Proceed to review and sign the contract using the instructions above

Finance Department

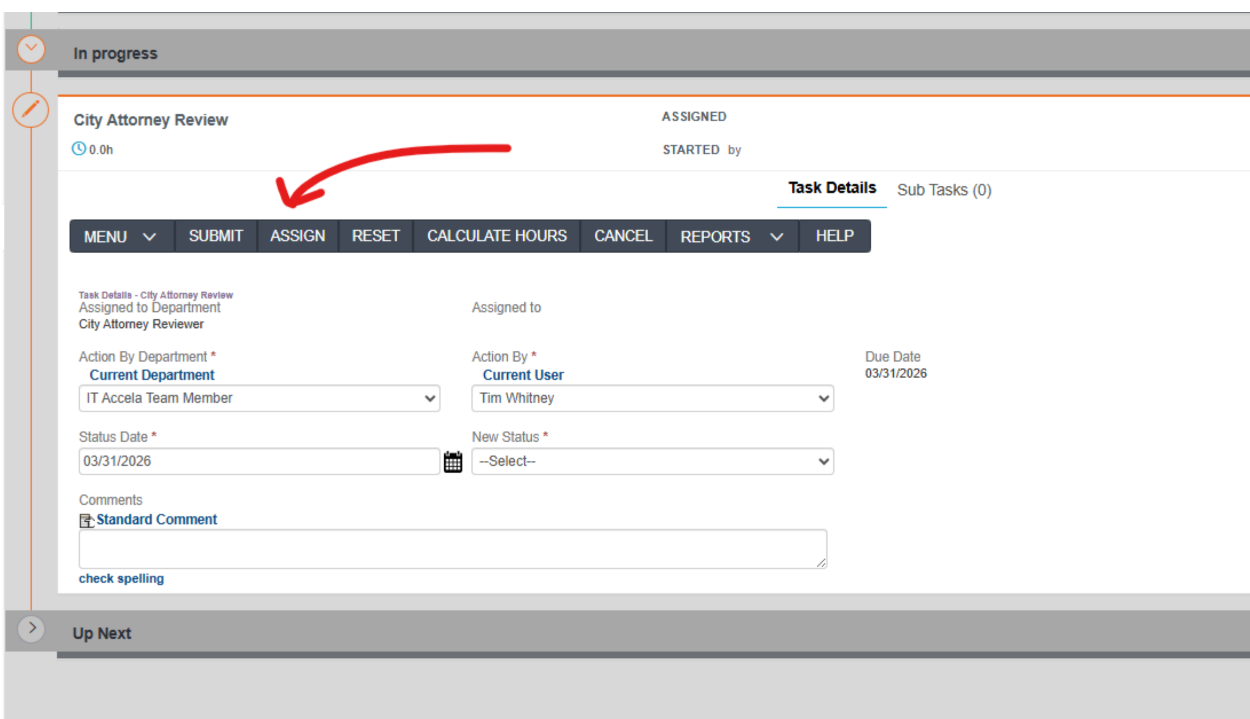
- Upon the Finance Review workflow step, Mary Richards will first review the contract.
- Once reviewed, select the contract record within the "Record" page.
- Go to the "Workflow" tab and click on "Finance Review".
- Set the "New Status" field to "Approve" and click the "Submit" button. This will send an email to Dave Schmiedicke to sign.
- Dave will then follow the steps above to sign the document.
- After signing, go into the "Workflow" tab of the contract record in Accela.
- Click on the Finance Review step in the workflow list.
- Set the "New Status" field to "Signed" and click the "Submit" button

City Attorney

- Open the contract record in Accela
- Click on the "Workflow" tab and click on the “City Attorney Review” task



- Click the "Assign" button



- Select the appropriate staff member in the "Staff" dropdown field.
- Click the "Submit" button when ready.
- In the "Workflow" tab, select "Notify Assigned to" in the New Status dropdown and click the "Submit" button.
- The assignee will then review the contract.
- Once reviewed, select the contract record within the "Record" page.
- Go to the "Workflow" tab and click on "City Attorney Review."
- Set the "New Status" field to "Approve" and click the "Submit" button. This will send an email to the City Attorney, Deputy City Attorney, or designee, to sign.
- The City Attorney, Deputy, or designee uses Digeplan to sign the document (see “How to Sign a Contract” instructions above.
- After signing, go into the "Workflow" tab of the contract record in Accela.
- Click on the City Attorney Review step in the workflow list.
- Set the "New Status" field to "**Signed**" and click the "**Submit**" button.
- This will automatically send the contract to the next agency on the workflow.

Mayor's Office (Standard Workflow - starting with Clerk, Mayor final signer)

(see next pages for custom workflows)

- Follow the steps above to sign the document.
- After signing, Mayor's office will need to flatten the signed contract – ***only flatten the contract, not any of the supporting documents.***
    - In DigEPlan, with the contract selected, click the "Processes" icon in the toolbar above the document list on the left-hand side of the screen.
    - Select "Approve Plan/Document."
    - In the resulting popup, uncheck the box for "Show only pages with markups" within the "PDF Output Options" group and uncheck the box for "Cover Page of Markups" within the "PDF Cover Page" group.
    - Click the "Execute" button.
        - This process will take a short amount of time - A green popup in the lower right-hand corner will indicate success. Please wait until you see this box
        - You can also check the Documents list in Accela - another copy of the contract will be added to the list with the status "**Approved-Pending.**"
        - Do not hit "Approved and Signed" in Accela until flattening is successful.
- Internal process: After the Mayor approves the contract via email, Diana du Cini or other staff opens the contract record in Accela & goes to the "Workflow" tab in the record details.
- Select "Approved and Signed" in the "New Status" field and hit the "Submit" button.

Final Steps after Final Signer (Clerk, Finance for Sharepoint, and OA)

- After the final signer hits submit, emails go to Finance, City Clerk and the OA.
- All three will download the "**Approved-Pending**" version of the signed contract, following the instructions in the email.
- All three should navigate to to the "Workflow" tab in the contract record details to change the "New Status" field to "**Complete**." Click "Submit" to save the completed status.
    - The record remains in Accela and may not show as complete, but it is done.
- The Munis # field can be used for notes, the OA can use this to mark a contract "done" if helpful

Custom Workflows – different final signer or reviewers

Metro Custom Workflow (Metro Transit General Manager = final signer)

This workflow is only for Metro Bus Ad Contracts and Commute Card agreements

Metro's other contracts should use the standard routing for mayor/clerk. Metro's grant agreements should be routed using the Standard workflow, see City Attorney for instructions when the granting entity requires signatures using another online platform.

Workflow order:

- OA (Metro ad person/admin staff)
  - Be sure to select the custom workflow for Metro Transit General Manager
  - Set the **classification** of the document in **Digeplan** – this is necessary <u>before</u> anyone signs the contract – this is what saves the signatures. See page 15 for instructions to set the classification.
- Finance
- City Attorney
- Final Signer: Metro Transit General Manager
  - **Flattening** - At this point – the contract must be "flattened" in Digeplan. This finalizes the document, saves and locks down all of the signatures. See page 15.
- OA final, City Clerk final, and Finance final for Sharepoint = same as the standard workflow.

Real Estate (ORES) Custom Workflow (OCA = final signer)

This workflow is only for certain real estate transactions – consult your City Attorney if not sure.

Workflow order:

- OA (ORES admin staff)
  - Be sure to select the workflow for Real Estate
  - In **Digeplan**, Set the **classification** of the document to be signed. This requires a Digeplan account. The classification must be set before the document can be signed and necessary to save the signatures. See page 15 for instructions.
- Mayor's Office Review
- Clerk Review
- City Attorney Review - City Attorney may need to "authenticate" signatures
- OA final
  - **Flattening step**: Before removing the contract from Accela – the contract must be "**flattened**" in Digeplan. This finalizes the document, saves and locks down all fo the signatures. See page 15 for flattening instructions.
- These real estate documents are recorded with the Register of Deeds so they do **not** go to the Clerk or to Finance for sharepoint.

CG21 Department Head Employment & Labor Contracts (HR only)

This workflow is for Department/Division Head contracts (CG21) and Labor Agreements only.

Workflow order:

- OA (Human Resources)
    - Be sure to select the workflow for "Department Head Employment + Labor"
- City Clerk Review (Clerk will sign & set the document classifcation.)
- Finance Review
- City Attorney Review (deputy CA reviews for all required content incl RESJI and risk)
- Final Signature (Mayor)
    - **Flattening** - these contracts end with the Mayor, so the Mayor's office will **flatten** the signed contract in Digeplan.
- OA final, City Clerk final, and Finance final for Sharepoint = same as the standard workflow.

PHMDC Custom Workflow (Health Director = final signer)

- PHMDC has separate instructions. Contracts are routed to City, County, and PHMDC, with several different workflows - full route, short route, Janel only, DHS, etc.

- PHMDC purchasing contracts are signed by City Purchasing in Munis, NOT in Accela.

- PHMDC final signed contracts are stored in Sharepoint – coordinated with City Finance

DOCUSIGN CONTRACTS (tracked in Accela, signed by Mayor in Docusign) and Contracts where the other party signs last – *COMING SOON*

To be used when the other party **requires** the City's final signature using "DocuSign" software.

This workflow adds a step to make sure the **fully signed contract** is properly stored in Sharepoint.

This is a modification to the standard workflow with mayor as final signer. Currently only authorized for grants & contracts with the State of Wisconsin. Consult City Attorney for other uses.

This method is subject to change - Consult the City Attorney's Office before using.

PAPER CONTRACTS (tracked in Accela, signed on paper)

Use for any contract that requires "wet" signatures on paper - to track signatures and approvals.

When creating the contract record, select the appropriate final signer, then select "**Yes**" in the "**Paper Only**" field. Change the **Yes / No** option to "**Yes**." No need to upload documents.

Selecting "Yes" will alert each signer that the contract will be coming to them on paper and there will be nothing to sign in Digeplan. You must hand deliver the contract to each agency / reviewer.

The "Documents" section is not required, but may be used for a COI or other supporting docs.

Miscellaneous Tasks:

Setting Document Classification (requires DigEPlan license)

- This step is necessary before anyone signs the contract, this allows the signatures to be saved. *Failure to set the classification will result in the signatures being lost.*
    - If you are using a separate document signature page – be sure to set the classification for the signature page - you don't need to set the classification for anything that is not signed. Only the document that gets signed.
- Open the contract and/or extra signature page (when applicable) in **DigEPlan**.
- After opening the document, click the "Classification" button on the bottom of the screen.
- In the resulting popup, choices will appear for "Plan" or "Document" – select "Document." and then click the "Save" button.
    - The red exclamation mark next to the "Classification" button should go away.

Flattening Instructions (requires DigEPlan license)

- **After** the last person signs for the City, the signed contract (or signature page) must be "flattened" in Digeplan. This is what saves and locks down the City's signatures. *Failure to flatten will prevent the signed contract from being downloaded out of Accela and finalized.*
- You only need to flatten the document that has City signatures on it – not supporting docs.
    - If using a seprate document as a signature page – that document must be flattened.
- Steps to flatten in Digeplan:
    - In DigEPlan, with the contract selected, click the "Processes" icon in the toolbar above the document list on the left-hand side of the screen.
    - Select "Approve Plan/Document."
    - In the resulting popup, uncheck the box for "Show only pages with markups" within the "PDF Output Options" group and uncheck the box for "Cover Page of Markups" within the "PDF Cover Page" group.
    - Click the "**Execute**" button and wait.
        - This will take a short amount of time - A **green** box will popup in the lower right-hand corner to indicate success. Please wait until you see this box.
        - You can also check the Documents list in Accela - another copy of the contract will be added to the list with the status "**Approved-Pending.**"
        - Do not hit "Approved and Signed" in Accela until flattening is successful.