

Loading a Pre-signed Agreement in CalUsource

Use this guide when you have a pre-signed agreement that you need to load into CalUsource. After loading the agreement, you will need to complete a few additional steps, which are outlined in this guide.

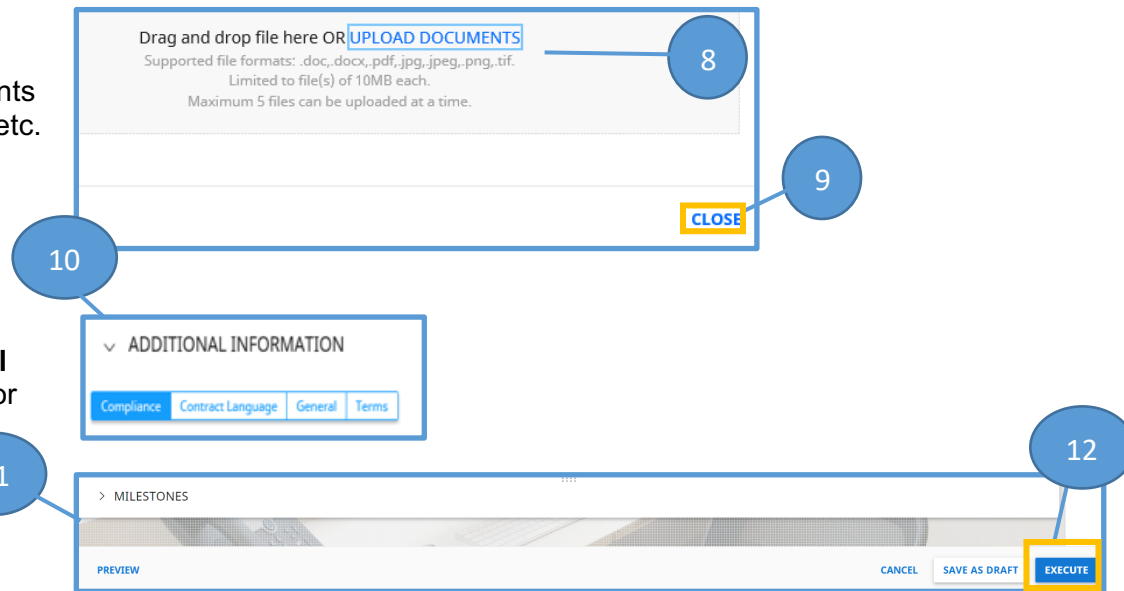
Instructions for loading a pre-signed agreement in CalUsource

1. Click **Create** from the Main Menu and select **Contract**.
2. Select **Using Blank Form**.
3. Fill out the contract coversheet.
Note: See the *Creating a Draft Contract* QRG for instructions on filling out the coversheet sections.
4. Click **Save as Draft**
Note: New fields will display after the draft is saved.
5. Click the double arrow icon in the **Contract Language** section.
6. Change the **Change Mode** from **Authoring** to **Pre-signed** and then click **Change**.
7. Click **Upload Documents**.

The screenshots illustrate the following steps:

- Step 1:** The main menu with the 'CREATE' button highlighted.
- Step 2:** The 'Using Blank Form' option selected in the 'Using Existing' section.
- Step 3:** The 'BASIC DETAILS' form with fields for Contract Name, Contract Number, Document Type, and Contract Type.
- Step 4:** The 'SAVE AS DRAFT' button highlighted.
- Step 5:** The 'CONTRACT LANGUAGE - Authoring' section with a double arrow icon highlighted.
- Step 6:** The 'Change Mode' dialog with 'Pre-signed Mode' selected.
- Step 7:** The 'UPLOAD DOCUMENTS' button highlighted.

8. Drag and drop the pre-signed contract along with any supplemental attachments and notes, such as price sheets, COI, etc. if applicable in the space provided.
9. Click **Close** when you are finished uploading the documents.
10. Review the questions in the **Additional Info** section and answer any required or applicable questions related to your contract.
11. If applicable, add milestones.
12. Click **Execute**



Warning: Once you press **Execute** the contract becomes non-editable.

Tip: If you are not ready to complete all of the above steps, you can click **Save as Draft** to save the contract without executing it. You can then come back later and finish the job.