

## Multiple Contracts

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Version Control					
Version	2.0	Release Date	Feb. 13, 2019	Authorized by	Wingham Rowan
<ul style="list-style-type: none"><li>NOTE: This document replaces the earlier "190117" version of this project. (That version did not feature contracts picklist.)</li></ul>					

### 1) SUMMARY

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America is a litigious society. To protect our partners, we need to clearly communicate the contracts that underpin activity in uFlexi. We also need to give all users more visibility and control over the wording that determines their usage.

uFlexi relies on contracts defining individual relationships as follows:

- BO to Agency
- Agency to Buyer
- Agency to Seller

But the pages are inconsistent, clumsy to navigate and make it hard to choose between a range of contracts for any of the three categories above. For example; an Agency might want to have some Sellers on a Student Worker contract, others on a Temporary Worker contract and another cohort on Seasonal work agreements. Currently that is near impossible.

This project will tidy up and align all our contracts screens. Contracts pages will need to be bought into compliance with Jon's work on screen overhauls generally, so focus is on getting the right elements on each screen for him to work with later.

This project draws on our need to align "LAVES" (List, Add, View, Edit, Select) pages. It lays the ground for a later enhancement called "Direct Employment Relationships (DERs)". These allow Agency to pass ownership of a Seller to other Agencies or Buyers for specific periods, for example when a Buyer wants Seller on their payroll under their contract of employment.

## 1) Business rules

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Core rules around contracts remain unchanged by this project. They are:

- A Contract is a freetext document including formatting and paragraphing.
- Agency, Buyer and Seller must each have a contract agreed with their owning entity.
- Each Agency, Buyer or Seller can only have one contract with their upper entity at any given time.
- A Contract cannot be amended once uploaded.
- Contracts cannot be deleted from the system.

## 2) Scope of this project

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We have four categories of contracts screens, all are in scope:

- i. **List:** Pages that display contracts available to an upper entity and allow new ones to be added. These have a **Select** mode: when user picks a contract to apply to a lower entity
- ii. **Add:** Screen for adding a new contract to a list.
- iii. **Application:** This is a function unique to Contracts. When a contract is applied to the lower entity, we go to a separate screen displaying the contract with an OK button for upper level user to confirm lower-level user's acceptance of contract. This screen is only accessible if the lower-entity has NOT signed the latest contract version.
- iv. **View:** Pages through which a contract can be viewed, but not changed.

	Journey	Screen	Actions
<b>i) List pages</b>			
1.	BO's contract for Agency	backofficeSystemContracts	
2.	BO default contract for Agency-Buyer	backofficeDefaultAgencyBuyerContracts	
3.	BO default contract for Agency-Seller	backofficeDefaultAgencySellerContracts	

4.	Agency: contracts for buyers	agencyBuyerContracts	Opens contract in agencyBuyerContractView
5.	Agency: contracts for sellers	agencySellerContracts	Opens contract in agencySellerContractView

### ii) Add pages

6.	BO	backofficeSystemContractAdd	
7.	Agency: contracts for buyers	agencyBuyerContractAdd	
8.	Agency: contracts for sellers	agencySellerContractAdd	

### iii) Application pages

9.	BO manages individual agency contract	Process begun on backofficeAgencyDetails	Opens contract in backofficeAgencyContractConfirm
10.	Agency applies contract to Buyer	Process begun on agencyBuyerCoreDetailsEdit	Opens contract in agencyContractWithBuyerSign.
11.	Agency applies contract to Seller	Process begun on agencySellerDetailsEdit	Opens contract in: agencyContractWithSellerSign

### iv) View pages

12.	Agency views contract with BO	agencyCoreDetailsEdit	Brings up contract as a pop-up to match our profiles
13.	Buyer: views contract with Agency	buyerViewContract	Brings up contract as a pop-up to match our profiles
14.	Seller: views contract with Agency	sellerViewContract	

### 3) Foundational work

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#### a) Turning contracts Lists pages into a picklist

Our List pages, above, each display a table of uploaded contracts. But only the top one can be applied to lower entities. We would like to turn these pages into a picklist, user can apply any contract in the table to the lower entity.

The mechanics of this already exist in the journey by which, for instance, Seller chooses verifications to request:

- On sellerVettings there is a button that lands on sellerVettingApplications.
- The landing page features a table from which user can view profiles or click to select rows.

Doing this requires a change in the display by which a contract is applied to a lower entity. We would like to create a standardized device for this task. Internally, let's call it the "Contract Application Tool". It will replace current methods for applying a contract to a lower entity on three pages:

	Relationship	Originating screen from which contract is applied
1.	BO > Agency	backofficeAgencyContractConfirm
2.	Agency > Buyer	agencyBuyerCoreDetailsEdit
3.	Agency > Seller	agencySellerDetailsEdit

#### Current tool

Our procedure on each of the three pages is slightly different. But Agency's page for managing Seller offers the best example:

Before the Seller is approved it displays:

**Worker contract:** [90068 Main work-seeker agreement](#). This is our latest contract

Status Not yet approved Created by Lisa Brown on Oct 20, 2017

#### Notes:

- It is displaying the top option on the appropriate List page as the only possible contract to be applied.
- The status cannot be changed until the contract has been clicked then approved.

After approval, the status can be changed and it shows:

**Worker contract:** [90068 Main work-seeker agreement](#). This is our latest contract

Status Approved Approved by Jenifers Lopez on Nov 20, 2017

If a newer contract is then uploaded to the List page, the display changes to:

**Worker contract:** [90068 Main work-seeker agreement.](#) [✎ Sign latest version](#) (90068 New work-seeker agreement)

Status Approved Approved by Jenifers Lopez on Nov 17, 2017

### Suggested new tool

The status DDB can remain untouched by this project. But we replace the pre-approval contract display with this:

**Worker contract** SELECT CONTRACT

- Clicking “Select Contract” opens the appropriate List page. That behaves exactly as now, but – if a contract is confirmed - landing back on the originating page, the “Select Contract” button has been replaced by:

[NAME OF CONTRACT] Confirmed by [NAME OF USER] on [DATE] | [Change](#)

**Worker contract** [Part Time Worker V4](#) Confirmed by Martin Jones on Apr. 14, 2019 | [Change](#)

- [NAME OF CONTRACT] is a link to the View page for the contract
- [Change](#) is a link that behaves as the button did, opening the List page. The page should be ticked for the current contract but another row can be selected instead.

Note: we want consistency of language on all pages, Contracts are “Confirmed” by the upper entity (not “Signed” or any other verb).

#### 4) Screen changes across all screens in each category

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##### a) List screens

- Note: Contracts have five lists screens (because BO can set up default contracts for Agency-Buyer and Agency-Seller).

##### New columns

- Could we add two new columns to the tables to add to “Version” and “Snippet”. The four columns, in order, on each page, should be:

Version	Date	Added by	Snippet
SAME CONTENT AS NOW	Date/time the contract was uploaded to the system	The user who uploaded the contract	SAME CONTENT AS NOW

For discussion: How easily could we include a column of how many lower-entities currently had that contract as their contract?

##### b) Add screens

##### Default to empty boxes

- These screens currently load with the last version of the upper-entity’s contract populating the text box. This is an odd convention. The page should load blank.

##### c) View screens

##### Change margins

- Our contracts can be difficult to read in web mode and incomplete when printed (ends of lines missing). This is because the line length can be so long. We have tackled this elsewhere in the system, for example at directoryHome. This page has a tight column width making it much easier to read, scroll and print. Can we adopt the same margin width for the main text on our Contract View pages.

- Content in the page heading has our usual margin widths for top of a page, this change only impacts the text of the contract.

For discussion: How easily could we add these details to each View page:

- Date this contract applied to this user
- Upper-entity user who confirmed the application of this contract to the user
- Number of signatories to the contract overall

#### d) Application screens

##### Enlarge and align tickbox

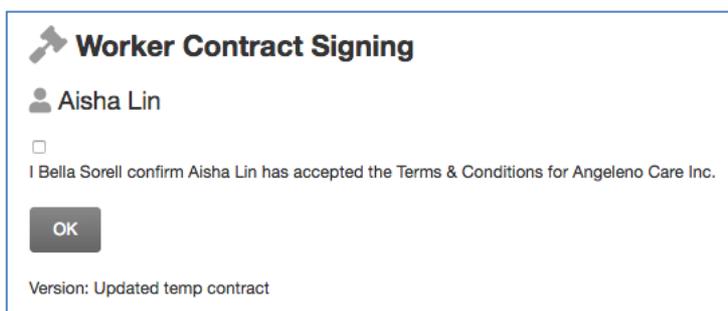
- These screens have tiny tickboxes. We have a much nicer tickbox available, for instance on sellerBuyersRoles (far left column). It populates with a green tick when ticked. Can we switch to this on all Application screens.
- Our tickboxes incongruously sit above the text to which they pertain:



- Can they be brought in line so the text is directly right of the tickbox.

##### Enlarge Contract title

- The contract version (title) being displayed is the crucial information on this page, just as important as who it is being applied to. Currently that name is in much smaller font. This can be seen for example on agencyContractWithSellerSign.



In the example above “Version: Updated temp contract” should be in the same font as “Aisha Lin”, the Seller name. (There is no icon for Contract version.)

## 5) Structural issues

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- *Both these issues should already have been sorted by creation of a standardized Contract Application Tool.*

### a) agencyBuyerCoreDetailsEdit:

The contract section (top of details sub-section) should provide a link to the current contract signed. (As agencySellerDetailsEdit does.) Currently it is simply the title without a link.

Compare Buyer page:



With Seller page:



### b) agencySellerDetailsEdit:

When Seller has status withdrawn, the system will still offer Agency the “Sign latest version (of Agency Contract)” link. This should not be displayed for a Withdrawn Seller. (The link to the last contract applied to them should stay. (“Student Contract B” in the example below.)



## 6) Wording changes for specific screens

Some of our wording is ungrammatical and icons are missing. Working through this table will bring everything in line.

	SCREEN CATEGORY	SCREEN	OLD WORDING/DISPLAY	NEW WORDING/DISPLAY	Notes
1.	List screens	backofficeSystemContracts	[NO ICON] View All System Contracts	[ADD ICON AS IN MENU] Contract: System - Agency	
2.		backofficeDefaultAgencyBuyerContracts	[NO ICON] All Default Client – Agency Contracts	[ADD ICON AS IN MENU] Default Contract: Agency - Buyer	
3.		backofficeDefaultAgencySellerContracts	[NO ICON] All Default Agency – Worker Contracts	[ADD ICON AS IN MENU] Default Contract: Agency - Seller	
4.		agencyBuyerContracts	[BUYER] Contracts	[BUYER] Contract  Use this screen to update the contract offered to [NAME OF AGENCY]'s [BUYER]s	The title should not be a plural. We only allow one contract to be active.  Note: No full stop after the explanatory text
5.		agencySellerContracts	[SELLER] Contracts	[SELLER] Contract  Use this screen to update the contract offered to [NAME OF AGENCY]'s [SELLER]s	

6.	View screens	agencyCoreDetailsEdit			This screen will be tackled in a project to overhaul Agency Manage screens.
7.		buyerViewContract	<p>Terms and Conditions</p> <p>This is the T&amp;C's covering use of this system.</p>	<p>Contract</p> <p>[NAME OF BUYER] was approved to book using this system through [AGENCY NAME] on [DATE]. This was confirmed by: [NAME OF USER WHO APPROVED SELLER].</p>	[NAME OF USER] and [DATE] are the same displayed under the "Status" field on agencyBuyerCoreDetailsEdit
8.		sellerViewContract	<p>Terms and Conditions</p> <p>This is the main contract you have signed with 90068work</p>	<p>Contract</p> <p>You were approved to work on this system through [AGENCY NAME] on [DATE]. This was confirmed by: [NAME OF USER WHO APPROVED SELLER].</p>	[NAME OF USER] and [DATE] are the same as displayed under the "Status" field on agencySellerDetailsEdit
9.	Apply screens	backofficeAgencyContractConfirm	I [NAME OF USER] on behalf of [DISPLAY NAME FOR SYSTEM] and their intermediaries confirm that [NAME OF AGENCY] has: been accepted as a system user, read, accepted and signed the	I [NAME OF USER] confirm that [NAME OF AGENCY] has: been accepted as a system user, read, accepted and approved the contract below and had their attention drawn to the	

			contract below and had their attention drawn to the terms of service for this system.	terms of service for this system.	
10.		agencyContractWithBuyerSign	I [NAME OF USER] on behalf of [NAME OF AGENCY] confirm that [NAME OF BUYER] has: been accepted as a [BUYER] by [NAME OF AGENCY], read, accepted and signed the contract below and had their attention drawn to the terms of service for this system.	I [NAME OF USER] on behalf of [NAME OF AGENCY] confirm that [NAME OF BUYER] has: been accepted as a client by [NAME OF AGENCY] and that an authorized individual has read, accepted and signed the contract below and had their attention drawn to the terms of service for this system.	
11.		agencyContractWithSellerSign	I [NAME OF USER] confirm [NAME OF SELLER] has accepted the Terms & Conditions for [NAME OF AGENCY]	I [NAME OF USER] confirm [NAME OF SELLER] has accepted the contract below, allowing them to be provided with access to this system by [NAME OF AGENCY].	