

## Creating and Routing Contracts in Contracts+

Because the Contract Templates and Contracts editing pages look similar, the header boxes at the top of the page are color coded and includes status information (Active, Draft, etc.) and Template Actions. When you are working on Contract Templates, the header box at the top is purple. For Contracts, the header box is light blue.

You may also use the list on the left side to navigate between pages of the contract templates and contracts. Make sure to regularly click **Save Progress** as you create your contract templates and contracts so that your entered data is saved. Clicking **Next** will also save your data.

Contracts+ keeps a running record of all the changes made on the software. As you are creating contract templates and contracts, click **History** on the top right-hand corner under the header box to view details of all the changes made.

There should only be one contract template per project unless there are multiple bid packages. All contracts and supporting documents needed for a project can be created from a single contract template. Please delete any duplicate contract templates.

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## Contract Templates

### Creating a Contract Template

1. Go to **Contracts** on the navigation menu.
2. Under **Libraries**, select **Contract Template Library**.
3. Enter **Capital** in the **Search by Name, Contract Type, etc.** field within the **Contract Templates** tab.
  - a. **NOTE:** Please use the templates already created in the system for your university instead of the **Create Template** feature. Make sure to create a copy of this contract template instead of editing this contract template directly to prevent any overriding of the original contract template.
4. Click **Search**.
5. Select **View Active** next to the name of the template appropriate to your organization from the list of Active templates.
  - a. Capital Chicago Contracts
  - b. Capital Springfield Contracts
  - c. Capital System Contracts
  - d. Capital Urbana Contracts
6. To create a copy of the Contract Template, go to **Template Actions** on the purple header box and select **Copy**.
  - a. **NOTE:** The system will create a copy of the template. The purple header box will indicate that it is currently in **Draft** status and fields are now editable.

### Naming Convention - Contract Templates

- Always start with a single 'Z' to sort Capital templates to the bottom of the overall list.
- Include the project number.
- Include the project name.
- If there are multiple templates, include something to differentiate the templates.

Examples:

- Z 606-C20093 Replace Windows Student Center East Tower
- Z S22013 UIS Innovation Center
- Z U18041 BP2 – ISR Townsend & Wardall Hall Renovation

### Updating a Contract Template

1. Enter a name in the **Template Name** field for the new contract template according to the naming convention.

2. Select the appropriate **Contract Type**.
  - a. To remove the existing entry, click the **X** next to the field.
  - b. Click the **Search (magnifying glass) icon** to locate the appropriate Contract Type.
  - c. Use the Search bar or expand and select one from the **Capital** category.
  - d. Click **Save Changes**.
3. Select the appropriate **Work Group**.
  - a. To remove the existing entry, click the **X** next to the field.
  - b. Click the **Search (magnifying glass) icon** to locate the appropriate Work Group.
  - c. Use the Search bar or expand and select one from the list.
  - d. Click **Save Changes**.
4. Do not enter information for **Value** or **Second Party** because that would apply to every contract and will require manual deletion or editing later.
5. Ensure that all the fields for **General Contract Info** are correct. These fields are automatically imported from the template.
6. Enter information in the fields under **Unit Info** that you want to populate on every contract.
7. Go to **Template Actions** on the purple header box and select **Finalize and Activate**.
8. Click **Yes**.
  - a. **NOTE:** The system will activate this template into an active template. The purple header box will indicate that it is now in **Active** status.
9. To edit an **Active** template, click **Create Draft** on the purple header box.

## Contracts

### Naming Convention - Contracts

The naming convention for contracts is the same as contract templates, except there is no single 'Z'.

- Include the project number.
- Include the project name.
- If there are multiple templates, include something to differentiate the templates.

Examples:

- 606-C20093 Replace Windows Student Center East Tower
- S22013 UIS Innovation Center
- U18041 BP2 – ISR Townsend & Wardall Hall Renovation

### Creating a New Contract

1. Go to **Contracts** on the navigation menu.
2. Under **Contracts**, select **Create New Contract....**
3. Enter a name in the **Contract Name** field for the new contract according to the naming convention.
4. Select the appropriate **Contract Type**.
  - a. Click the **Search (magnifying glass) icon** to locate the appropriate Contract Type.
  - b. Use the Search bar or expand and select one from the **Capital** category.
  - c. Click **Save Changes**.
5. Select the appropriate **Contract Template**.
  - a. Click the **Search (magnifying glass) icon** to locate the appropriate Contract Template.
  - b. Use the Search bar (enter project number) or select one from the list.
  - c. Click **Save Changes**.
6. Verify the **Work Group** is correct for the **Contract Type** selected.
  - a. **NOTE:** If the Work Group is incorrect, change it to the appropriate Work Group. This will ensure that the contract number has the correct prefix (CN or CAP).
7. Select the appropriate **Main Document Template**.
  - a. Click the **Search (magnifying glass) icon** to locate the appropriate Main Document Template.

- b. Use the Search bar (enter project number) or click **Select** next to desired template on the list.
8. Click **Create Contract**.
  - a. **NOTE:** The system will create a new contract from the template. The light blue header box will indicate that it is currently in **Draft** status and fields are now editable.
  - b. **NOTE:** The transfer of data from a contract template to a contract is a one-time occurrence. Any changes made on the data of this contract will not affect the data on the contract template, and vice versa.

## Editing a Contract

All contract items with an asterisk must be completed so that they are put through the correct workflow. Contracts are required to have second parties. Supporting documents do not require second parties and will not go through the approval workflow because they do not need a Comptroller signature. Therefore, necessary data from a reporting and process standpoint must be completed.

1. Open the contract you want to edit.
  - a. **NOTE:** Many of the fields will have been transferred over from the template.
2. Complete the necessary groups for the type of document that you are generating.
  - a. **NOTE:** Please refer to the **Main Document Data Mapping** job aid under **Contracts+** on the Capital Training page for a chart with more details.

## Header

3. Enter the **Value** of the contract.
  - a. **NOTE:** A negative number cannot be entered in this field. Therefore, if the value is a negative number, enter "0" instead.
4. Click **Add Party** next to **Contract Parties**.
5. Enter the name of the Second Party in the search field.
6. Click **Search** (magnifying glass icon).
7. Select appropriate Second Party from the list.
8. Click **Select Contract Party**.
9. Click **Next** to bypass choosing a contact.
10. Select the appropriate address in the drop-down menu for **Choose An Address**.
11. Click **Done**.

12. Review the **Contact Address Information**.
13. Click **Done**.
14. Select the appropriate **Capital Contract Type** from the drop-down list.

### Amount

15. Enter the **Amount** of the contract.
  - a. **NOTE:** The value in the **Amount** field should be the same as the **Value** field in the header. However, if the amount is a negative number, you may enter it in this field.

### Capital Info

16. Ensure that the data for the fields under **Capital Info** is imported correctly from the contract template.
17. Under **Capital Project Information**, fill out all the fields in this section.

### Editing the Contract Main Document

Using the information entered for the contract, Contracts+ will generate a Main Document. There is a textbox on the top of the document with a guiding checklist and reminders of what items need to be completed before moving on to Internal Review. When you are editing the Main Document, make sure the document is checked out to you using the **JAGGAER Contract Authoring** Word Application. Please remove the text box before submitting the contract for review.

### Attachments

1. Go to **Attachments** page on the navigation list on the left.
2. Click the **Main Document** file in the **Attachment** column to download onto your computer.
3. Open the file in Microsoft Word to edit.
  - a. **NOTE:** You may have to click **Enable Editing** to edit the document.
4. If the Second Party information has not all been migrated into the Main Document, please do the following:
  - a. Exit out of the Main Document.
  - b. Go to the **Project Delivery Method** page on the navigation list on the left.
  - c. Select **No** for **Using PRZM**.
  - d. Select back to **Yes** for **Using PRZM**.
    - i. **NOTE:** This forces the system to generate a new version of the main document with the Second Party information.

- e. Return to the **Attachments** page.
    - i. **NOTE:** The number of versions for the Main Document will have increased by two to reflect the edits you just made.
  - f. Click the **Main Document** file in the **Attachment** column to download onto your computer.
  - g. Open the file in Microsoft Word to edit.
5. Under the **Home** tab on Microsoft Word, select **Show Taskpane** for **JAGGAER**.
- a. **NOTE:** This will open the **JAGGAER Contract Authoring** Word Application pane next to the document.
6. Click **Continue** on the application to confirm yourself as the user.
- a. **NOTE:** You can see that the contract is checked out to you with a timestamp on the top along with the **Draft** status.
7. Under the **Review** tab, use the **Comments** feature **Previous** and **Next** to easily jump to items that need to be entered directly into the Main Document Word file. These items are marked with comments that provide additional guidance.
8. If there are custom fields on the main document that need to be entered or corrected, go back to the Header in Contracts+ to make the changes.
9. Once all the items are completed, check to see if there are any custom fields that were missed.
- a. Under the **Home** tab, click **Find** in **Editing**.
  - b. On the **Navigation** pane, enter "[[" (double brackets) to search for any missed custom fields.
10. If you need to insert or edit text into the Main Document, make sure to paste text only to maintain the original formatting of the Main Document.
11. Click **Check In** on the bottom of the **JAGGAER Contract Authoring** pane.
12. Enter a description of the changes you made in the field.
13. [Optional] Select the checkbox to **Keep this contract checked out to me**.
- a. **NOTE:** You may want to enable this if you need to go talk to someone about what to enter in the custom fields and return to this document later.
14. Click **OK**.
- a. **NOTE:** A notification will appear on the bottom that indicate that your edits were successfully checked in. To edit the contract again, click **Check Out**.
15. Return to the **Attachments** page on Contracts+.
16. Refresh the page.

- a. **NOTE:** The number of versions for the Main Document will have increased by one to reflect the edits you just made.
17. Go to the **Actions** drop-down and select **Version History**.
- a. **NOTE:** The Main Document Version History screen will appear listing each version of the Main Document including the attachment file and details (date when the version was uploaded, who made the changes, and included comments).

### Comparing Versions

1. To compare versions of the Main Document, click **Select** in the **Compare** column for each of the document versions you want to compare.
2. Once the document versions are added to the **Compare Section**, click **Compare**.
  - a. **NOTE:** The documents will appear side by side on a new page. Edits are highlighted in yellow for easy comparison.

## Internal Review Round

The Internal Review Round is an automated workflow that facilitates the review of a contract by designated reviewers. It is not an approval process to obtain the comptroller's signature. Users at each step review the header data and the main document and then provide comments. Only one user needs to act on the Review Round at each step. Review Rounds automatically bypass steps where at least one user is not assigned to the necessary step. Risk Management Review has no configuration so it will always be bypassed.

The Internal Review Round must be initiated by the Contract Administrator and proceeds only forward. A reviewer cannot return the process to the previous step. If a Reviewer identifies a need to stop the Internal Review Round, they must notify the Contract Administrator. Only the Contract Administrator can end an Internal Review Round at any time in any status for any reason. A contract can go through multiple Internal Review Rounds.

All contracts, which includes advertisements and front end documents, require Internal Review Round except contracts with a Contract Type of 'Capital - Change Orders.'

## Initiating an Internal Review Round

### Review Rounds

1. Go to the **Review Rounds** page on the navigation list on the left.
2. Click **Start Automated Internal Round**.
  - a. **NOTE:** If you want specific people to review the contract before starting the automated Internal Review Round, click **Create Manual Internal Round**. Search and select the reviewer(s), then click **Save Changes**. Once you return to the Review Rounds page, click **Begin Round**, enter a message to reviewers, and click **Begin Internal Review**.
3. Enter a message to send to all reviewers in the **Message to Reviewers** field.
  - a. **NOTE:** This message will be sent to reviewers as an email notification. Therefore, please enter adequate details for reviewers to review appropriately.
4. Click **Begin Automated Internal Review**.
  - a. **NOTE:** Reviewers will be notified via an email notification or an on-screen notification in Contracts+.
    - i. The email notification contains the contract number, name of the Contract Administrator, and the Internal Review message created by the Contract Administrator.
    - ii. The on-screen notification in Contracts+ contains the contract number.
5. Click **View Automated Internal Review Steps** to expand and view the reviewers required for each step.
6. View the **Current Round (Internal)** section to see details for each step.

- a. Click **Edit** to add additional information in the message that was sent to all the reviewers.
- b. Click **End Round Now** to end the Internal Review Round at any time.

## Reviewing During the Internal Review Round

1. Log into Contracts+.
2. Access the contract via one of the following:
  - a. Notifications in Contracts+
    - i. Click the **Notifications (bell) icon** in the header. There will be a blue oval over the icon with the number of notifications.
    - ii. Select the desired notification and you will be taken to the Internal Review group for the contract.
  - b. Email Notifications
    - i. Click **View Contract** on the email to go to the Contract Summary page in Contracts+.
3. Review the contract by using the navigation menu on the left to view specific contract information.
  - a. **NOTE:** Use the Communication Center if changes need to be made to the contract. Changes must be made to the document before completing the review.
4. Go to the **Contract Actions** on the light blue header box.
5. Select **Done with My Review**.
6. Enter a comment for the Contract Manager in the textbox.
  - a. **NOTE:** This comment can also be viewed by other reviewers.
7. Click **Done with My Review**.
8. Expand the **Current Round (Internal)** section to see details for the review you just completed and that the contract was sent to the next reviewer.

## Using the Communication Center

If there are changes that need to be made to the contract, please use the Communication Center to work with the Contract Administrator to make those changes before completing the review.

1. Access the Communication Center via one of the following:
  - a. Communication Center page
    - i. Go to the **Communication Center** page on the navigation list on the left.

- ii. Click **Add Internal Message**.
  - b. Contract Actions
    - i. Go to the **Contract Actions** on the light blue header box.
    - ii. Select **Add Internal Message**.
2. For **Subject**, enter the contract number, Project name and any other clarifier about the document content so that reviewers know which contract you are referring to.
  - a. Example: CN\_00074877 on Assigned Subcontractor for U19035
3. For **Body**, enter the message you want to communicate.
4. Expand the Recipients section by clicking on **Recipients**.
5. Enter the names of those you want to send this message to.
  - a. **NOTE:** Please include the contract administrator and all the reviewers who were involved in the prior steps of the Internal Review Round.
6. Click **Create**.
  - a. **NOTE:** An email notification will be sent out to the recipients regarding this new message. They will also find a notification in Contracts+.

## Initiating Another Internal Review Round

Once the first Internal Review Round is complete, the Contract Administrator will receive an email notification communicating that the Internal Review for the contract is over and the contract is in the Draft status.

1. Click **View Contract** to open the contract in Contracts+.
2. View the details of each review step in the **Round #1 (Internal)** section.
3. Click **Start Automated Internal Round** to start another Internal Review Round.
  - a. **NOTE:** If you want specific people to review the contract before starting the automated Internal Review Round, click **Create Manual Internal Round**. Search and select the reviewer(s), then click **Save Changes**. Once you return to the Review Rounds page, click **Begin Round**, enter a message to reviewers, and click **Begin Internal Review**.

## Ending the Internal Review Round

For automated internal rounds, the internal review round will automatically end when all the reviewers have completed their review. If the contract admin needs to end the internal review round for any reason, follow these steps below.

1. Click **End Round Now**.



- a. **NOTE:** A notification screen will appear notifying that if you end the round now, reviewer(s) will be skipped.
2. Click **End Round**.

## Obtaining Second Party Signatures

Once the Main Document is complete, a clean version needs to be sent out (without notes and comments) to the Second Party for signatures via email. Once the signed versions are received, it needs to be uploaded with supporting documents to Attachments and assigned as the Main Document that should be printed with the full contract (replacing the old main document versions).

### Sending Main Document to Second Party Vendors for Signature

1. Open the Main Document in Microsoft Word.
2. Go to the **Review** tab.
3. Under **Tracking**, select **No Markup** in the **Display for Review** drop-down list.
4. Save the file.
5. Email the file to the Second Party vendor for signatures.

### Uploading Signed Main Document

1. Open the appropriate contract.
2. Go to the **Attachments** page on the navigation list on the left.
3. Under **Contract Actions**, click **Check Out**.
4. Click **Add Attachments**.
5. Select **Add My Own** for Attachment Type.
6. Click **Select files...**
7. Select the signed main document file.
8. Click **Open**.
  - a. **NOTE:** In case the file size is too big, reduce the file size in Adobe by following these steps:
    - i. Open the file in Adobe.
    - ii. Click the **File** tab.
    - iii. Under **Save as Other**, select **Reduced Size PDF**.
    - iv. In the **Reduce File Size** dialog box that appears, click **OK**.
    - v. In the **Save As** window, choose where you want to save the new version of the PDF.
  1. **NOTE:** It is recommended to change the name of the file to better differentiate between the original and reduced versions.

- vi. Click **Save**.
  1. **NOTE:** Adobe will reduce the size of the file and save a new version. This may take a few minutes depending on the size of the file you started with. If the contract is still too large, it is recommended to run it through the compression process a few more times to further reduce the size.
9. Once the signed Main Document is uploaded, click **Save Changes**.
  - a. **NOTE:** The new attachment will be listed in the Attachments page, but the crown remains next to the old Main Document attachment.
10. Click **Action** next to the old Main Document attachment.
11. Select **Unassign as Main Document**.
12. Click **Yes**.
13. Click **Action** next to the old Main Document attachment again.
14. Select **Edit Properties**.
15. Select **No** next to **Print with Full Contract**.
16. Click **Save Changes**.
17. Click **Action** next to the attachment you just uploaded.
18. Select **Set as Main Document**.
  - a. **NOTE:** Now the crown should be next to the new attachment noting it as the Main Document.

## Approval Workflow

Contracts+ will automatically generate an approval workflow based on the contract type and items. **It is critical to make sure all required sections are complete and accurate before submitting for approval.**

### Completing the Approval Workflow

1. Go to the **Submit for Approval** page on the navigation list on the left.
2. Make sure all required sections are completed.
  - a. **NOTE:** Go to the incomplete sections by clicking from the given list or the navigation list on the left to complete the required items.
3. To see the approval workflow, click **View Approval Steps** to expand.
  - a. **NOTE:** Click **View approver** under each step to see who the approvers are.
4. Click **Submit for Approval**.
5. Enter a message to the approvers in the field, as needed.
6. Click **Submit for Approval**.