Searching for Contracts in Contracts+ – Capital Programs

To find out the status of your Contract or what a status of a contract means. You can access the search options from the left side of the screen by navigating to **Contracts** > **Contracts** > **Search Contracts**, **View Saved Searches**, **Search Contract Parties**, **View Import/Export Results**.

Search Contracts - The **Simple Search and Advanced Search** help to locate the contracts based on specific criteria. You can perform a simple search, or you can perform an advanced search based on a more complex set of values.

- **Using the Simple Search** – When you have the contract number or description of the contract, this type of search is recommended.
- **Advanced Search** – If you want to capture a certain group of Contracts from the system based upon Username, Contract Type, Contract Status (see definitions below), Work Group, Date Range, Active for Shopping, Custom Fields, Contracting Party, and other metadata, this type of search is recommended.
  - For **Contract Number**, you may enter the entire or a part of the contract number. Capitalization does not matter.
  - For your first time in the system, the **By Start/End Date** field will default to **Effective**. Depending on your search type, update this field to **ALL**.
  - For your first time in the system, the **Active for Shopping** field will default to **Active**. Depending on your search type, update this field to **ALL**.
- **Quick Search** – On the top of your screen, there is a quick search option. You must know the contract number. Click the arrow next to the **Search** field and change from All to **Contract**, enter the contract number in the **Search** field and click **Search** (magnifying glass icon). If you have access to view the contract, it should be at the top of the results.
- **Export Search** – if you want to export the results of your search to go the left side and click Export Search.
  - Enter a **Description**.
  - From the **Action** drop-down menu, select **Excel Export** or **CSV Export**.
  - Once the export has been submitted, you will receive a pop-up box, click **Go to Page: Download Export Files** or to view the export results later, from the left side go to **Contracts** > **Contracts** > **View Import/Export Results**. When the status is **Completed**, click the file name to open the results.
- **Search Contract Parties** – allows you to search for companies that can be selected and listed as a second party on a contract. You can perform a simple search or an advanced search for contract parties.

Contract Status Definitions

- **Draft** - The contract is under construction and has not been submitted for approval.
- **Complete** - The contract has reached its scheduled end date and all steps required to close the contract have been done. The Complete action is typically used when a contract has reached its scheduled end date and has expired. This is a manually applied contract status and typically only applied after all invoices have been entered against the contract.
- **Expired** - A contract is automatically marked as expired once its scheduled end date has passed.
- **Executed: Future** - The contract is approved but will not be in effect until its scheduled start date.
- **Executed: In Effect** - The contract is approved and active.
- **External Review** - The contract draft is complete and is undergoing an external review by individuals who do not have access to the system.
- **Internal Review** - The contract is undergoing an internal review by users within the system.
- **Out for Signature** - This applies to systems using eSignature, where the contract is in the approval workflow. It indicates that **Yes** has been selected for the **Use eSignature for this contract?** question on the contract header, and the contract has been sent from the eSignature service provider to the signers for approval.
- **Pending Approval** - The contract is complete and moving through the approval workflow.
- **Pending Signature** - This applies to systems using eSignature, where the contract is in the approval workflow. It indicates that **Yes** has been selected for the **Use eSignature for this contract?** question on the contract header and the manual signature block placement option has been chosen on the eSignature page. When the contract reaches the appropriate eSignature workflow step it will stop and display a Pending Signature status. Contract managers then need to select the Launch Signature contract action to open Adobe Sign or DocuSign, where they place signature block placeholders on the contract and send it out to the signers for review, or manually upload a signed copy of the contract.
- **Rejected** - Users can reject contracts using the Reject contract action. When a contract is rejected, it is removed from workflow, its status is changed to Rejected, and a rejection time stamp is added. Users cannot amend or renew rejected contracts. Rejected contracts can still be archived, copied, and returned to draft. Rejected contracts appear in contract search results.
- **Superseded** - The contract is an old version of a contract that is no longer in effect. It has been replaced with a newer version of the contract that is in the status **Executed: In Effect**. This occurs if a contract has been amended or renewed. The previous versions of

the contract will have their statuses changed to Superseded and the most recent version of the contract will then receive the status **Executed: In Effect**.

- **Terminated** - The contract has been stopped before its scheduled end date. A termination is used post execution, when terms cannot be reached, and the contract will not go forward. You can copy and print a terminated contract, but it cannot be returned to active status.

How to Save a Search

You can save search settings and organize saved searches in folders, share them, or export search results. Saved searches are useful if you use the same search criteria frequently and want to save contract search settings to use again or export a limited set of records.

1. After running a search, click **Save New Search** from the left side of the screen.
2. **Step 1: Edit Saved Document Search Details**
    a. Enter a nickname in the **Nickname** field.
    b. [Optional] Click **Add Description** to enter a description.
3. **Step 2: Select Destination Folder**
    a. Click the **Add New** drop-down menu.
    b. **NOTE:** Depending on your permissions, you may select the option that fits best for the search: **Top level personal folder**, **Top level shared folder**, or add to an existing **Personal** folder or existing **Shared** folder.
4. **Step 3: Select Export Template**
    a. From the **Action** drop-down menu, select **Excel Export** or **CSV Export**.
    b. The **Include Custom Fields in Export** is automatically selected. If you do not want the custom fields, click the box to remove the check.
5. Click **Save**.

How to View, Edit, and Run a Saved Search

1. To view previously saved searches, navigate to **Contracts** > **Contracts** > **View Saved Searches**.
2. All **Personal** and **Shared** searched will be listed on the left side. Depending on your permissions, you may also have the option to **Add New**.
3. To run the search:
    a. Click the name of the search in blue font or click the **Go** button on the right side.

4. To edit a saved search:

    a. Run the saved search and click **Back to Search** in the top left corner of the results.

    b. Make the necessary changes to the advanced search criteria and click **Search**.

    c. Once you are ready to save the change you have made to the search, click **Save Changes** or **Save New Search** from the left side of results view.

    d. Click **Yes** on the **Confirm** box.

5. Other actions you may have from **View Saved Searches** are edit, move, copy, and delete. The edit option from here allows you to change the name, description, export format, and whether or not to include custom fields for the selected search.