

SECTION 1 – THE BASICS OF JAGGAER

1.1 OVERVIEW



Jaggaer is a centralized cloud repository Contract Lifecycle Management (CLM) tool for creating, maintaining and managing contracts. It utilizes automated paperless workflows – from initiation through approval and execution. It integrates contract creation, contract management, and electronic archiving. Information about contracts is tracked within Contract Lifecycle Management and contract documents are managed as attachments.

Contracts, RFQs, RFPs, SOWs can be electronically sent to internal and external parties. Signatures are obtained by either using DocuSign software or sent through a “wet” signature process. It also includes the ability to search and find any contract.

Jaggaer offers a library of standard templates for full contracts and allows various stakeholders to collaborate on authoring and approval of the contracts.

Executed contracts are exported to Workday for further processing. Exported contracts must pass validation and budget check in Workday.

1.2 GLOSSARY OF JAGGAER TERMS

TERMS	DEFINITION
Dashboard	Quick access to list of actions, lists and quick links.
Roles	Determine what actions a user can perform.
Work Group	Categories configured in a parent-child hierarchy that allow administrators to organize and control access to an organization’s contracts. Determines parties who can view or edit the contract. A user will have permissions for one or more work groups.
Contract Type	The type of contract varies depending on the type of services being provided.
Main Document Template	Main document templates are used to configure contract text. A main document template is a read-only Word document that contains standardized contract text used as the starting point for all contracts created from the template. They save time by eliminating the need to enter contract information repeatedly, and also provide consistency for contract terms and conditions.
Contract Template	Contract templates contain default values for data entry fields when creating a contract.
Contract Data	User entered data required by the main document template and data for the export to Workday.



TERMS	DEFINITION
Main Document	The main document is the main document template and the contract template merged with the contract data.
Summary	Limited view into the contract information.
Summary Field	Used for board reporting.
Contract Parties	The participants in the contract. The First Party is the owner of the contract - the District or one of the Foundations. The Second Party is a vendor, supplier or contractor that provides the services.
Header	An area where all contract related information is entered and viewed. Header included the following sections: contract header, contract parties, dates, and contract information.
Department	Used for approval workflow.
Attachments	Supporting documents in Word, Excel, PDF, image files, etc. uploaded to the contract
eSignature Integration	eSignature provides the ability to sign contracts electronically using DocuSign.
eSigner	A person authorized to sign (execute) the contract using DocuSign.
Approvals	Management approvals for the contract.
Contract Status	Indicated where a contract is in its workflow.
Comments	Comments related to the contract can be forwarded to appropriate stake holder. Comments can be used as discussions threads. Comments can be sent as an email notification and Jaggaer notification.
Communication Center	Used to monitor and record external email correspondence about a contract from one central location within Jaggaer.
Review Rounds	Task used to communicate with external parties and district and college employees.

1.3 ROLES

Contract Requester	Can create, edit, and view their own contracts
Contract Approver	Can review, approve, or send back to requester
Administrator	Can view, update, and manage all contract in the workgroups
Stakeholder	Can view all contract in the system

SECTION 4 – CREATE NEW SUPPLIER CONTRACT FOR DISTRICT FURNISHED AGREEMENT

4.1 CREATE A NEW CONTRACT DRAFT



If you are creating a Supplier Furnished Agreement, please refer to the [Supplier Furnished Agreement Job Aid](#) for instructions.



If you need to use a **new Cost Center, Program, or Spend Category** in a new contract, please email workday@socccd.edu or call 949-348-6123 **before creating the contract.**

If you proceed with creating a contract before the new worktags are added, you will need to delete the contract draft and create a new contract to be able to use the newly added worktags.

From the **Contract Home** Page:

1. Click on [Create New Contract...](#) under the **Quick Links**

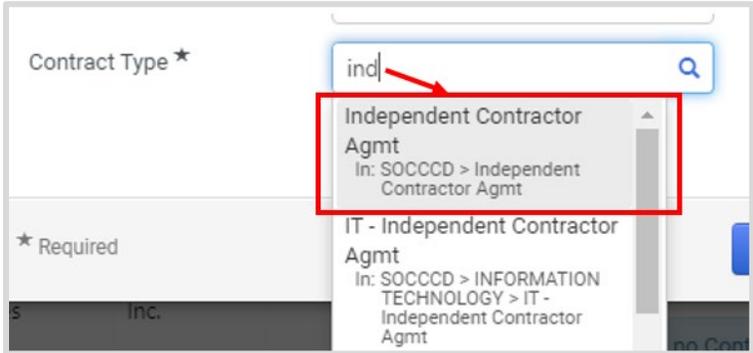
The screenshot shows the 'Contract Requester Dashboard' with several sections: 'Organization Message', 'Information', 'Contract Search', 'My Contracts in External Review', and 'Quick Links'. The 'Quick Links' section is highlighted in blue and contains the following items: 'Create New Contract...' (highlighted with a red box and a red arrow), 'Advanced Contracts Search', 'View Saved Searches', and 'Workday'.

2. In the **Create Contract** window, type the contract name in the **Contract Name** field. Please follow the adopted [contract naming convention](#).

Contract Name ★

 You will be able to add contract number to the **Contract Name** after you create the contract draft. **Contract Name** field is located on the **Header** tab.

3. In the **Contract Type** field, enter the contract type, for example, **ind** in the search bar and select the appropriate contract type from the list.



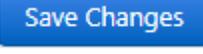
The screenshot shows the 'Contract Type' field with a search bar containing 'ind'. A dropdown menu is open, showing search results. The first result, 'Independent Contractor Agmt', is highlighted with a red box and a red arrow. Below it, another result 'IT - Independent Contractor Agmt' is visible. The field is marked as 'Required'.

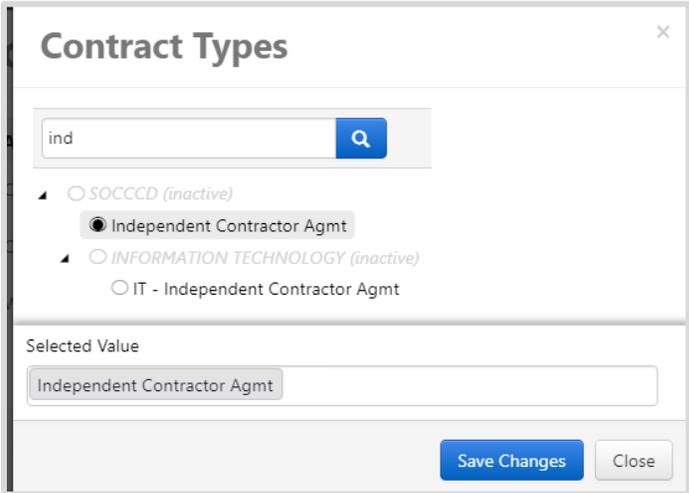
Or

Click on the magnifying glass  in the **Contract Type** field. Click the arrow next to the

▶  SOCCCD (inactive)

SOCCCD  to expand the contract type hierarchy and select the appropriate contract template. A list of contract types will display. Make the appropriate

selection and click .



The screenshot shows a 'Contract Types' dialog box. At the top, there is a search bar with 'ind' and a magnifying glass icon. Below the search bar, there is a tree view showing a hierarchy of contract types. The 'SOCCCD (inactive)' folder is expanded, and 'Independent Contractor Agmt' is selected with a radio button. Below the tree view, there is a 'Selected Value' field containing 'Independent Contractor Agmt'. At the bottom right, there are 'Save Changes' and 'Close' buttons.

 There are two independent contractor agreement types. If you are creating an Information Technology (IT) contract, please select IT- Independent Contractor Agreement.

4. **Work Group** will auto-fill. If you have access to multiple work groups, you will need to select the appropriate workgroup for your contract.

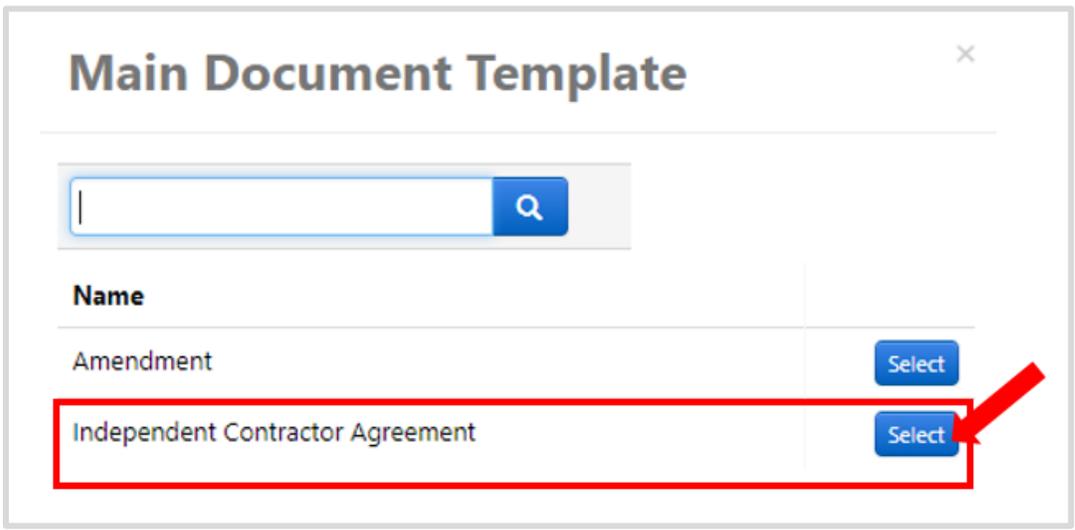


A screenshot of a 'Work Group' dropdown menu. The dropdown is open, showing two options: 'SC-FMO-Facilities' and 'Maintenance Office'. There is a search icon and a close button (X) in the top right corner of the dropdown.

 Some users may belong to more than one work group. These users will need to select appropriate workgroup for the contract they are creating.

5. Click on the  magnifying glass in the **Main Document Template** field.

6. In the new popup window click  next to the template name.

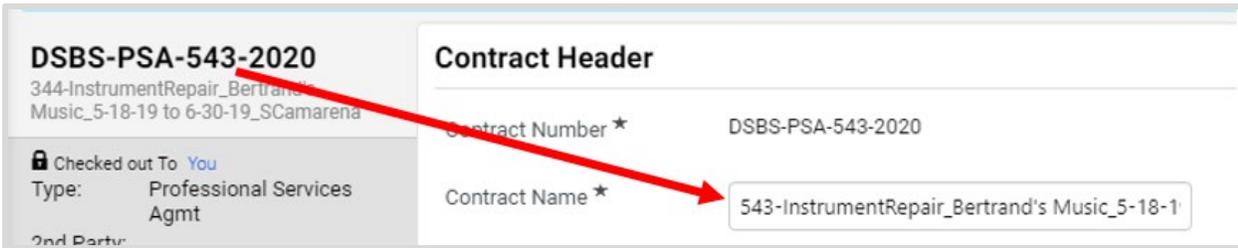


A screenshot of a 'Main Document Template' selection popup window. The window has a title bar with a close button (X). Below the title is a search bar with a magnifying glass icon. Below the search bar is a table with two columns: 'Name' and 'Select'. The table contains two rows: 'Amendment' and 'Independent Contractor Agreement'. The 'Independent Contractor Agreement' row is highlighted with a red box, and a red arrow points to the 'Select' button next to it.

 After you select the **Main Document Template**, the Word document with the district contract language will be automatically filled with entries into the contract fields in Jaggaer. This document will be sent via DocuSign or through a wet signature process for the supplier and then the district signature.

 If you are creating a contract for a **supplier furnished agreement**, leave **Main Document Template** field blank. Consult [Job Aid - Jaggaer Create Supplier Furnished Agreement](#) for instructions.

7. Click . You have now created the contract draft.
8. The contract **Header** page will display and the [contract number](#) will be assigned at this stage. Click on the **Contract Name** field and add the **Contract number** to the **Contract Name**. Click .



The screenshot shows the 'Contract Header' form. On the left, there is a summary card for contract 'DSBS-PSA-543-2020' with details like '344-InstrumentRepair_Bertrand's Music_5-18-19 to 6-30-19_SCamarena', 'Checked out To: You', 'Type: Professional Services Agmt', and '2nd Party'. The main form area has 'Contract Number *' set to 'DSBS-PSA-543-2020' and 'Contract Name *' set to '543-InstrumentRepair_Bertrand's Music_5-18-19'. A red arrow points from the contract number field to the contract name field.

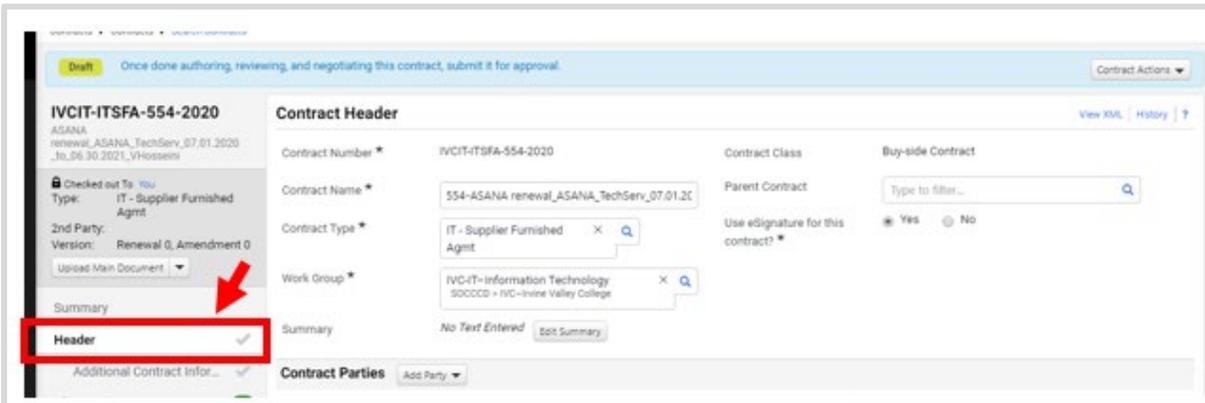
9. For contracts using the district templates (i.e., ICA, GAA, PSA, etc.), you **must send the contract draft with the Terms and Conditions for the supplier review prior to entering the rest of the fields on the contract**. Refer to [How To Send External Communication](#) section of the manual for instructions.

 For contracts over \$15,000, please solicit three quotes.

4.2 CONTRACT HEADER AND REQUIRED FIELDS

HEADER AND CONTRACT SUMMARY

In the **Header** contract tab, you will need to enter all required information for the contract.



The screenshot shows the 'Contract Header' and 'Summary' sections. The 'Contract Header' section includes fields for 'Contract Number *' (IVCIT-ITSFA-554-2020), 'Contract Name *' (554-ASANA renewal_ASANA_TechServ_07.01.2020), 'Contract Type *' (IT - Supplier Furnished Agmt), and 'Work Group *' (IVC-T-Information Technology SOCCCD - IVC - Invine Valley College). The 'Summary' section has a 'Header' tab selected, indicated by a red box and a red arrow. Other tabs include 'Summary' and 'Additional Contract Infor...'. The 'Contract Parties' section has an 'Add Party' button.