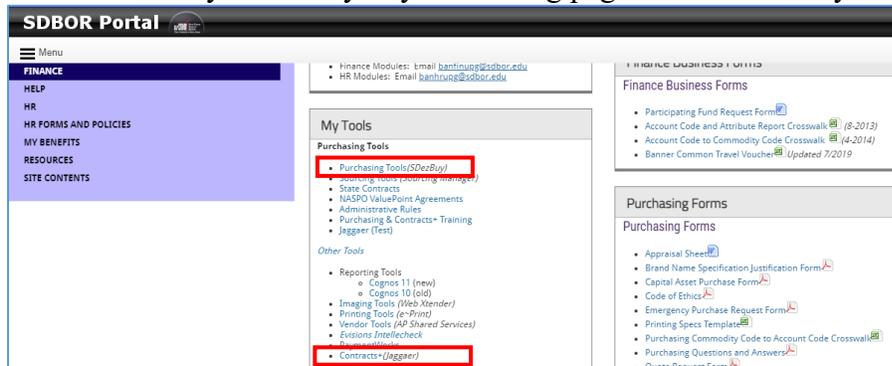




## Contracts+ Getting Started Guide 21.2

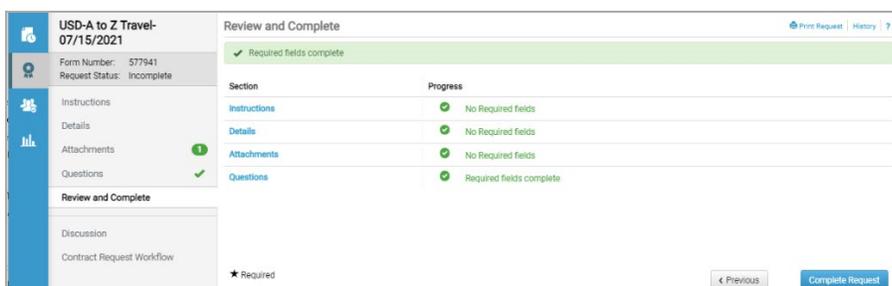
### Accessing the Application

1. Access the SNAP/SDBOR portal. Enter your credentials and Sign In.
2. Click on the **FINANCE** option in the left-side menu.
3. Select **Contracts+ (Jaggaer)** under **Other Tools** or select **Purchasing Tools (SDezBuy)**. This should take you directly to your landing page within SDezBuy.



### Create a Contract Request (Contract Requestor steps)

1. Navigate to **Contracts > Requests > Request Contract**.
2. Complete these fields in the **Create Contract Request** window:
  - **Contract Request Name** - Campus-Vendor name-mm/dd/yyyy with today's date.
  - Select a **Contract Request Template**
3. Click **Submit**. The contract request opens to the **Instructions** page. Please read.
4. Click on the **Next** button. The **Details** page displays. Update the **name** of the contract request, if needed. Click **Save Progress** or **Next** to proceed to the next screen.
5. Add or delete the **Attachments** you want to include in the contract request and click **Next**.
6. Complete the series of **Questions** and complete the fields as directed. (Questions with an \* are required fields.) When finished, click **Save Progress** or **Next** to proceed.
7. The **Review and Complete** page should indicate all required field are complete.
8. Click the **Complete Request** button, then click **Yes** in the Confirmation window.





## Contracts+ Getting Started Guide 21.2

### Important When Filling out Contract Information

- SDSMT is always first party
- The signatory for first party is Bill Spindle [William.Spindle@sdsmt.edu](mailto:William.Spindle@sdsmt.edu).
- If it is a grant funded contract, Ralph Davis [Ralph.Davis@sdsmt.edu](mailto:Ralph.Davis@sdsmt.edu) will also need to sign. However, there is not a space to add him in. He will be added when the contract is approved.
- Second Party is the individual or company we are creating this contract with.
- It is very important to put the correct information for the contact info and the contact info for the company's authorized signatory.
- Make sure vendor is set up in banner
- Miscellaneous and travel expenses should be included in the total

### Search Contracts

If your organization manages a large number of contracts, the Search Contracts page is key to locating the contracts you need. There are two ways to search, and which type to use depends on what you're looking for:

#### Contract Simple Search

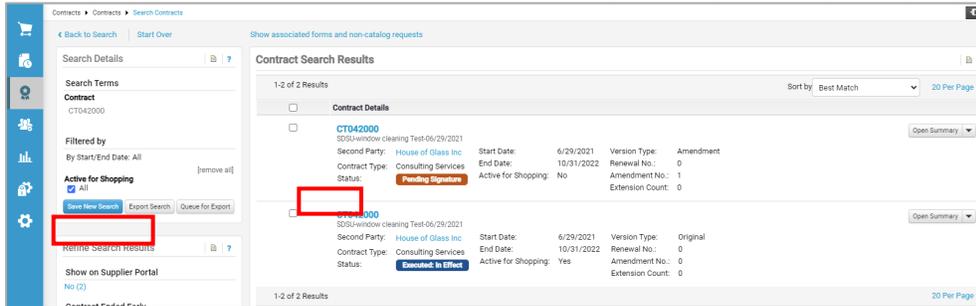
Use **Simple Search** when you may not have all the information you need and want to search based on partial information. The system will search all contract fields for each keyword entered, providing you with a broad results set.

#### Step-by-Step

1. Go to **Contracts > Contracts > Search Contracts**.
2. Click the **Simple Search** link (if it is not defaulted to simple search)
3. Enter search criteria by completing the following fields:
  - **Contract**
  - **Active for Shopping** (should default to All)
  - **By Start/End Date** (should default to All)
  - **Created Date between** (should default to All dates)
4. Click the **Search** button  to view your results. (Note: Active for Shopping must be 'ALL')
5. (optional) **Sort by**
6. (optional) **Refine Search Results**.
7. Click on the **Contract number** to open the contract for review or action. Note the information provided on the **Contract Search Results** screen.



## Contracts+ Getting Started Guide 21.2



### Contract Advanced Search

**Advanced Search** allows you to enter complex search criteria for a narrow results set. Use advanced search when you have exact data or a complex set of values that you want to search for, e.g., you have a contract number, or want to apply multiple search filters to limit the number of search results. The system only returns results that contain an **exact match** to the values entered.

### Step-by-Step

1. Go to **Contracts > Contracts > Search Contracts**.
2. Click the **Advanced Search** link in the top-right corner of the page if you are not on the Advanced Search page.
3. Enter search criteria in the search filter fields. The information must be exact; for example, you need the complete contract number. If you have only partial data, use a simple search.
4. **Contract Value**
  - **Value** - Used to search contracts by the amount entered in their **Value** field.
  - **Contract Total Value** - Used to search contracts by total contract value.
5. **Contract Party Options**
  - **First Party** - Search for contracts where the specified contract parties in the search filter are first parties on contracts.
  - **Primary Second Party Class** - Search by the primary second party's classification as entered on their contract party profile.
6. **Custom Contract Fields**
  - **Alternate Contract Number** – If added to the contract.
  - **Scope of Service** – Use keywords to narrow search results.
  - **State Auditor Contract Number** – if known.
7. **Renewal** - Search for contracts based on their renewal settings.
  - **Auto-Renew** - Select **Yes** or **No**.
  - **Will Not Renew** - Select **Yes** or **No**.
8. **eProcurement (Skip)**
9. **Communication Center** - Search for contracts with communications.
10. **Applies To** - Search for a department
11. **Status Flags** - Select the checkbox.
12. Click the **Search** button to view your results.