



University
of Idaho

JAGGAER

CONTRACTS+ TRAINING

QUICK REMINDERS

- Replaces VandalWeb Contracts Module
- Idaho State Board of Education Directive
- U of I Policies and Procedures remain the same



OBJECTIVES

YOU WILL LEARN:

- What is JAGGAER
- Contracts+ organizational structure
- Process Overview
- Why the change
- Differences between Contracts+ and VandalWeb Contracts module

JAGGAER



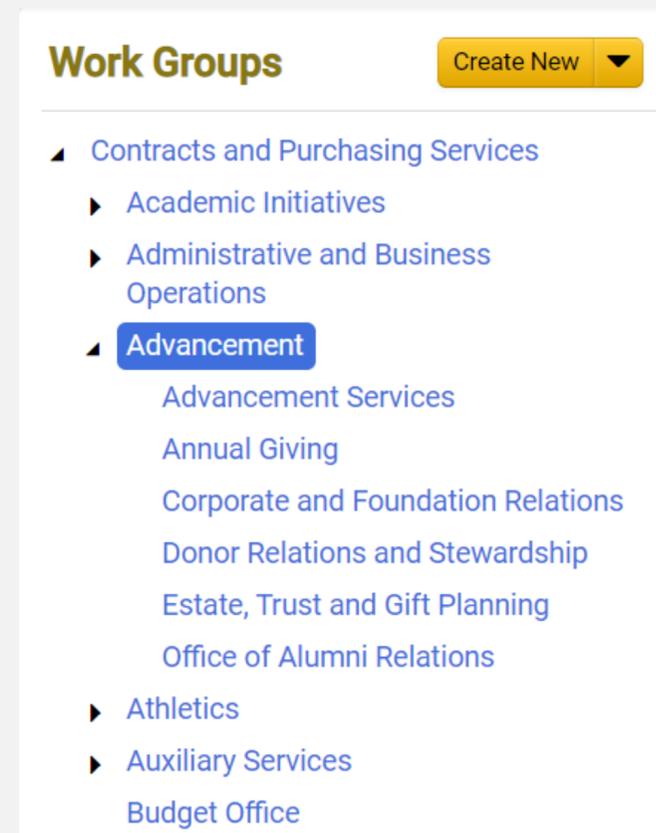
- JAGGAER replaces VandalWeb contracts module
- U of I, BSU, ISU, and LCSC are now using JAGGAER per the Idaho State Board of Education directive
- JAGGAER also replaces Banner requisitions and purchase orders
- The Goal: for each institution to save money through collaboration and competitively bid contracts

ORGANIZATIONAL STRUCTURE

CONTRACT VISIBILITY AND ORGANIZATION

Work Groups help control visibility and organize contracts.

- Work Groups are categories configured in a parent-child hierarchy that allows administrators to organize and control access to an organization's records
- Contracts are managed through Work Group structures with unique access rights
- Users assigned to workgroups are automatically granted visibility to contracts within a Work Group



ROLES

CONTRACTS+

- **Contract Requester** – Can complete contract requests using a configured request form
 - All Faculty and Staff, T1s
- **Contract Manager** – Review Contract Requests and create contracts from those requests
 - Department Financial staff
- **Contract Approver** – Approvers/Reviewers of Requests and Contracts via workflow
 - College/Unit Fiscal Officer

CONTRACT TYPES

CONTACTS+

- **Contract for Services** – Replaces Long and Short Forms in VandalWeb
- **Facility Use Agreement** – for the rental of U of I-owned spaces to a second party.
(Used by select departments)
- **Other Parties Agreement** – Contracts on other parties' paper
 - **Hotel Agreement** – Group Reservation Agreements

A close-up photograph of a person in a white shirt signing a document with a silver pen. Another person's hands are visible holding the paper. The background is blurred, showing an office setting. The text "CONTRACT WORKFLOW" is overlaid in the center.

CONTRACT WORKFLOW



CONTRACT LIFECYCLE

OVERVIEW

Contracts and Purchasing Services

Contract Request

Contract Creation

Contract Unit
Approval

Authoring /
Negotiation

Contract
Approval

Contract
Execution

Post Contract
Execution
Management

1. CONTRACT REQUESTS

CONTRACT REQUESTERS

- **Contract Requesters** can complete contract requests using a configured request form
 - Request form asks for basic information to begin the contract creation process.
 - Once submitted, the request is sent to the work group's Contract Manager(s) for contract creation.

Requester → Manager → Approver → OSP → C/PS → Manager → Vendor → Manager → C/PS → Manager → Vendor

2. CONTRACT CREATION

CONTRACT MANAGERS

- **Contract Managers** can take the basic information provided in a contract request and create a contract.
 - At this stage, contract templates are selected and additional information is provided to determine workflow.
 - Contract Managers also can create a contract directly at this stage.
 - Once submitted, the request is sent to the work group's Contract Approver(s).



The contracting party must be an **active vendor** in Banner – this is a change from VandalWeb. New contract parties should be set up in PaymentWorks. (Exception: Hotel Agreements)

Requester → Manager → Approver → OSP → C/PS → Manager → Vendor → Manager → C/PS → Manager → Vendor

3. CONTRACT APPROVALS

COLLEGE/UNIT LEVEL CONTRACT APPROVERS

- **Contract Approvers** will have the opportunity to review the contract before approving the contract for workflow steps.
- Contract Approvers can also create a contract directly at this stage.
- Once submitted, the request is sent to OSP (if sponsored project), or directly to Contracts and Purchasing Services



4. CONTRACT APPROVALS

OFFICE OF SPONSORED PROGRAMS

- If “**Yes**” is selected on the question “*Is this INDEX a sponsored project?*” the contract will be flagged for review and approval by the Office of Sponsored Programs.
- If “**No**” is selected during contract creation, the contract will skip review by OSP and route directly to Contracts and Purchasing Services.
- Once approved, the contract is routed to Contracts and Purchasing Services.



5. CONTRACT APPROVALS

CONTRACTS & PURCHASING SERVICES

- All contracts route to Contracts and Purchasing Services for review and approval.
- **Contracts for Services:** Initial review and approval of the contract.
- **Other Parties Agreement/FUA/Hotel Agreements:** Contracts and Purchasing will negotiate and sign.
 - If no countersignature is needed/already signed skip to step 9: Contract Execution

 **Departments are not authorized to sign contracts on behalf of the University.** All Contracts for the purchase of goods or services must be reviewed and signed by Contracts and Purchasing Services. **Contracts for \$25k or greater must be competitively bid.**

Requester → Manager → Approver → OSP → C/PS → Manager → Vendor → Manager → C/PS → Manager → Vendor

6. VENDOR SIGNATURES

CONTRACT MANAGER

- Once the contract is approved by Contracts and Purchasing Services, the **Contract Manager must send** the contract documents to the vendor for signature.



The Contract Manager is responsible for ensuring the contract is sent to the vendor for signature once approved by C/PS.

Requester → Manager → Approver → OSP → C/PS → Manager → Vendor → Manager → C/PS → Manager → Vendor

7. VENDOR SIGNATURES

VENDOR

- The vendor should review the contract and sign if the terms are agreeable.
- Questions regarding the contract terms can be directed to purchasing@uidaho.edu.
- It is recommended that the contract be returned to the **Contract Manager** after the vendor has signed.

8. VENDOR SIGNATURES

CONTRACT MANAGER

- Once a contract signed by the vendor is received by the **Contract Manager**, it is their responsibility to upload the signed document into JAGGAER for U of I's countersignature.
- **Contract Managers** are also responsible for ensuring that the contract is received from the vendor in time to be fully executed before any work begins.

 **Departments are not authorized to sign contracts on behalf of the University.** All Contracts for the purchase of goods or services must be reviewed and signed by Contracts and Purchasing Services.

Requester → Manager → Approver → OSP → C/PS → Manager → Vendor → Manager → C/PS → Manager → Vendor

9. CONTRACT EXECUTION

CONTRACTS & PURCHASING SERVICES

- Once a contract signed by the vendor is uploaded into JAGGAER by the **Contract Manager**, Contracts and Purchasing Services will review the contract, and countersign to fully execute the agreement.
- Contracts and Purchasing Services will mark the agreement as “**Executed**” and at this stage, work can begin.

Requester → Manager → Approver → OSP → C/PS → Manager → Vendor → Manager → C/PS → Manager → Vendor

10. POST CONTRACT EXECUTION

CONTRACT MANAGERS

- Once a contract is marked as “**Executed**” the Contract Manager should notify the Contract Requester and send a copy of the fully-executed agreement to the vendor for their records.

POST CONTRACT EXECUTION MANAGEMENT



TO DO:

POST CONTRACT EXECUTION

- Send a copy of the executed agreement to the vendor for their records.
- Review the vendor's work and obligations
- Begin contract renewal in advance of contract expiration (see obligations)



OBLIGATIONS

POST CONTRACT EXECUTION

Obligations are tasks or actions that need to be completed for a contract, such as documentation that must be provided, reviews that must be completed, or compliance criteria that a contract must fulfill.

- Assignable to anyone
- Flexible enough to be created or managed anytime
- Can be used as a task assignment or notification
- Out-of-the-box Obligations Report

Obligation Examples

Certificate of Insurance Updates
Periodic IT / Data Security
Reviews
Policy Reviews
PO Renewals
Fiscal Year End Tasks
Contract Specific Deadlines

STANDARD REPORTS

JAGGAER provides out-of-the-box, standard reports for specific data-driven contract milestones.

- Reports specific to Contract Managers / Administrators (Permission Driven)
 - Contracts that Require Attention: Review Pending
 - Contracts that Require Attention: Expiring Contracts
 - Workload by Contract Manager Report
 - Cycle Time Report
- Reports specific to Template and Clause administrators
 - Contract Template and Clause Analysis
- Reports available to all users:
 - Obligations Across Contracts



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