UNIVERSITY OF ILLINOIS SYSTEM

Using the Jaggaer Word App during Contract Review

Required Roles: Contract Administrator, Internal Reviewer

The JAGGAER Contract Authoring for Word app is a contract authoring tool that allows main document template populated text and corresponding clauses to be edited in Microsoft Word by Contract Administrators and those participating in Review Rounds for the contract they are working on while the contract is still in Draft.

The app is only available for use with Microsoft Word 2013 and above. Once the app is installed, you can sign in and out of the app with your Contracts+ login credentials.

Installing the Jaggaer Word App

1. Open Microsoft Word.

2. Click the **Insert** tab in the ribbon.

3. Click **Get Add-ins** in the **Add-ins** section.

4. Enter "Jaggaer" in the **Search** field.

5. Click **Search** (magnifying glass icon).

6. Select one of the following by clicking the **Add** button:

    a. **JAGGAER Contract Authoring (Test Environment)** – Use while you are testing the system in UIT.

    b. **JAGGAER Contract Authoring** - Use when you are authoring live contracts in production system.

    c. **NOTE:** Do not use the EU versions of the Authoring app unless told to do so.
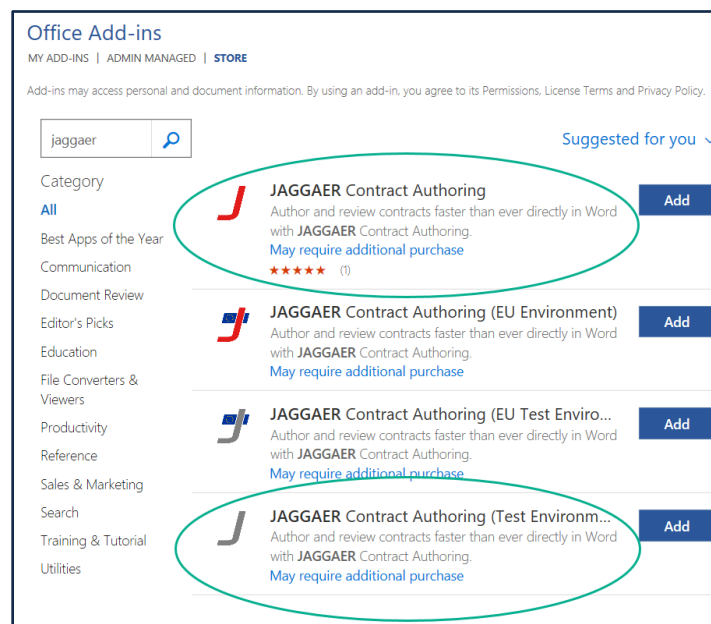
7. After your selection, a pop-up will appear. Click **Continue**.

8. After you have added the Jaggaer word app, an app icon will appear in the **JAGGAER** section of the **Home** tab on your ribbon.
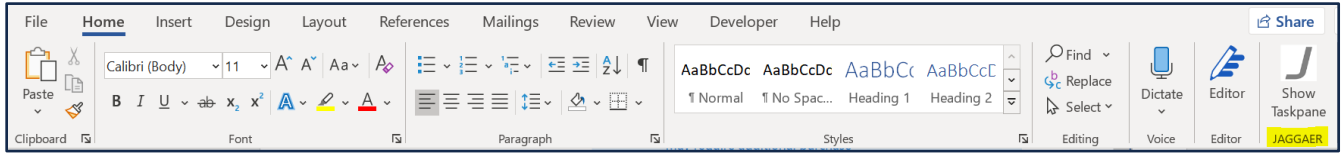
9. You have now successfully installed the Jaggaer word app. You will now need to connect it to your user profile.

10. Log in to iBuy.

11. Click on your user profile.

12. Select **View My Profile**.
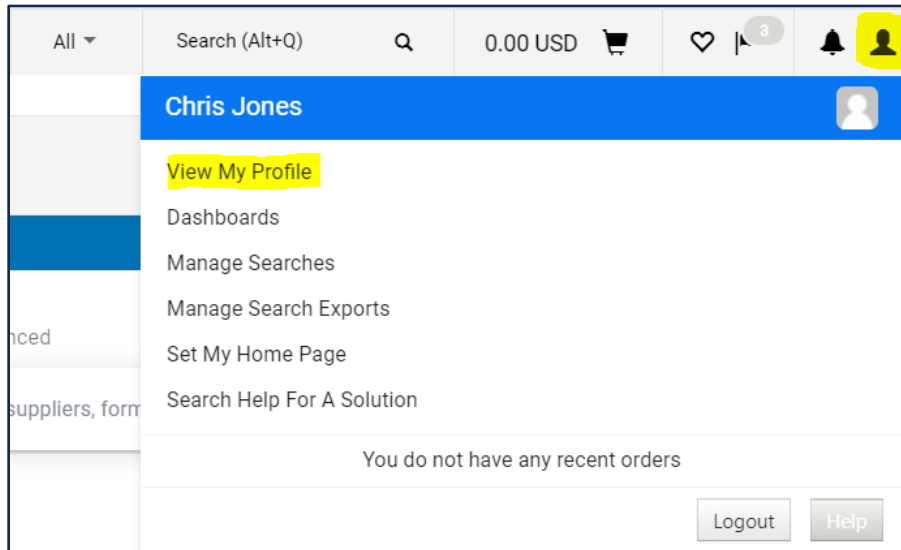
13. Select **App Activation Codes** in the menu.

14. Select Add Device

15. Click the **Add Microsoft Word** button.

16. There will be a pop-up that says Create App Password. Create a password which you will use to log into the Jaggaer Word App Taskpane.

17. Click **Create Password**.

   a. **NOTE**: After you create your password, another pop-up called *Add Device* will show up. This will be the name for your laptop or desktop computer. An example name could be "Mike's laptop". You can select to have the Activation Code emailed to you.
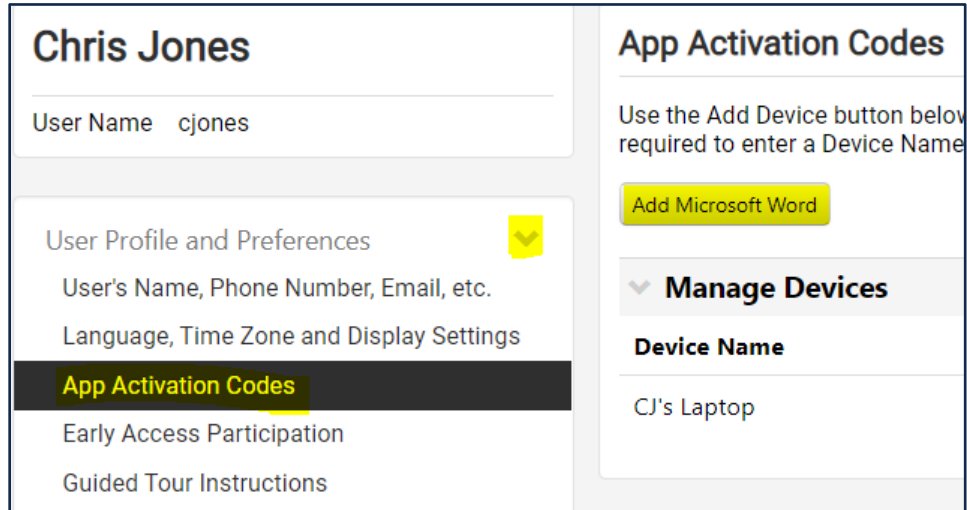
18. You will need to add an **App Activation** code for each device that you use to author contracts. So, if you are going to just use a laptop you will only have to do this once. If you are going to use a laptop sometimes and a desktop at home, then you will need to add two devices. Give the device a name, and if you are doing this for yourself, you can select **No** for Email Activation Code to User and click the **Add Device** button.

19. This will give you a code that you should now copy and then bring up Word.

20. Click on the Jaggaer **Show Taskpane** located in your ribbon.

21. Enter the **Activation Code** when prompted.

22. Click **Activate**.

23. If you are using single sign on, the system may have asked you for a password as well which you will need to use to access the word app.

a. **NOTE:** After this is complete, you will now have successfully installed the Jaggaer Word App and linked it to your user profile. You can now use the Jaggaer word app when building contract templates and authoring/redlining contracts in the system.

Opening and Editing a Contract Main Document

1. Use **Contracts** > **Contracts** > **Contract Search** to locate the DRAFT contract record you wish to work on.

2. Click **Open Main Document** in the left menu, or click the **Main Document** link on the **Attachments** page to download the file.

3. Open the downloaded file in Microsoft Word.

    a. **NOTE:** This will depend on your browser. You may need to click the **document icon** in the lower left corner, or click **OK** to open it from a pop-up window.

4. In the open Word file, you may need to click **Enable Editing**. Once the document opens, the Word app is displayed in a panel to the right.

5. If required by your system, enter your **password.**

6. Click **Sign In**.

    a. **NOTE:** For systems that require a password, the sign-in page only appears if you have not used the Word app in the last 30 minutes. Otherwise, you will not need to enter a password to open the Word app if you are already logged into Contracts+.

7. If applicable, click **Open Latest Version** in the Word app panel on the right to make sure you have the most recent version of the record.

    a. **NOTE:** This button is displayed if there is a newer version of the document available. If you want to work with the newer version of text, clear all existing text (including headers and footers) by using **CTRL-A**, then **Delete**, then click **Open Latest Version** to populate the document with the newest version of text.

8. Click **Check Out** to prevent other users from modifying the text while you are making changes.

    a. **NOTE:** At any time, you can click **Discard Check Out**. No changes will be saved to JAGGAER Indirect/Contracts+. To return to the last saved version of the document, clear the contents of the Word document section and select **Open Latest Version**, or download again from Contracts+.

9. [Optional] You may want to make sure **Track Changes** is turned **OFF** in Word, on the **Review** tab.

    a. **NOTE:** If **Track Changes** is on, any tracked changes and comments will appear in all documents generated from the Word document, including downloaded PDF documents. When working with templates, **Track Changes** must be turned **OFF** before you can delete clauses from a template.

10. Edit text as needed.

11. When you are ready to save your changes, click **Check In**.