



## Field Level Instructions

### CONTRACT HEADER FIELD GUIDE

Below is the list of the fields, required and optional, that appear on the Header of the contract record, and on the Digital Accessibility section of a Technology related contract. It is recommended that as many fields as possible are entered. When viewing online, required fields are designated with a star to the right of the field name.

Header	Contract Number	Automatically assigned unique identifier for this contract record. Appears in contract search results, summary of contract, when linking a Req/PO/Invoice to a contract, and on the Purchase Order if it is linked to a contract.
Header	Contract Name	Meaningful short description for this contract up to 100 characters. Appears in contract search results, summary of contract, when linking a Requisition/Payment Request to a contract; and if routing a contract via the eSignature feature, in the subject of the email sent to the signer. The filename of the executed contract document is set to the Contract Name. Examples: SOW 4 for Data Warehouse Consultant, Amendment 1 extending SOW for Data Warehouse Consultant, Amendment 5 to Rebate Agreement, Master for Admissions Software.
Header	Contract Type	Select value that best reflects the type of contract. Examples: Agreement, Amendment, Order Form, Statement of Work.
Header	Contract Language	Language contract is written in. The default is English.
Header	Work Group	Select the group (tub) that initiated and has primary interest in this contract. Type the tub number (e.g. 175) to display a sub list of applicable value(s). Do not select President and Fellows of Harvard College.
Header	Contract Class	Buy-side Contract (default) = Harvard is purchasing goods or services from the other party. Sell-side Contract = Harvard is selling goods or providing services to the other party.
Header	Summary	A detailed description of the contract. Click Edit Summary to enter. Appears in summary of contract and when linking a Req/PO/Invoice to a contract.
Header	Parent Contract	If there is language in the contract that links it to an existing contract, search for that contract and select it; the easiest way to find it is by searching on the sequence number portion of the parent Contract Number or the supplier's name. Once selected, the Parent Contract Number will appear in this field and the Parent contract will appear in the Contract Family for this contract. Examples: Amendment, Statement of Work, or Order Form that links to an Agreement.

Header	Use eSignature for this contract?	Yes = This contract will be signed electronically through this B2P contract management tool via the Launch eSignature Contract Action. No (default) = This contract is already signed or will be signed outside of this tool.
Header	Show on Supplier Portal	Yes = Allow supplier to see the contract via their Jaggaer Supplier Portal. No (default) = Do not allow supplier to see the contract via their Jaggaer Supplier Portal. If Yes is selected and the supplier is using the Jaggaer Supplier Portal, the executed contract document and a few of the key data fields will be accessible to them through their portal when the contract status is Executed: In Effect. In the Contract Parties portion of the Header, there will be a red X ❌ under Current Visibility if the supplier does not have access and a green checkmark ✅ if they do.
Header	Add Party First Party (Primary)	For Buy-side Contracts, the Harvard legal entity named in the contract. If the default is not correct, Remove Party via Actions; and then Add Party, First Party. More than one First Party is allowed if applicable. For Sell-side Contracts, add the other party.
Header	Add Party Second Party (Primary)	For Buy-side Contracts, the other party (supplier) named in the contract; Add Party, Second Party. More than one Second Party is allowed if applicable. If the Second Party is not found, invite the supplier to register if they will be paid or request that they be added via the Contract Party Request form if they will not be paid. For Sell-side Contracts, the Harvard legal entity.
Header	Time Zone	The time zone the dates and times in the contract are based on. Defaults to EDT/EST.
Header	Start Date	The effective date and time (defaults to 12:00 AM) of the contract.
Header	Update Start Date Upon Execution	Check this box if the Start Date is based on the last signature date and the Launch eSignature Contract Action is being used to obtain the last signature.
Header	Expires On / No Expiration	Expires On = The contract has a specified expiration or renewal date or estimated completion date (for deliverable based contracts). No Expiration = The contract is perpetual, it doesn't have a specified expiration or renewal date or estimated completion date and will remain active until terminated.
Header	End Date	Only displays if Expires On is selected. The expiration or renewal date and time (defaults to 11:59 PM) specified in the contract or the estimated completion date.
Header	Review Date	If after executing the contract, one or more reviews will be needed for purposes other than expiration or renewal, this date can be used to trigger a Notification to the Contract Manager(s) and/or Stakeholder(s).
Header	Review Term	If using Review Date and the need for a review recurs, enter the period in-between reviews.

Header	Reviews Remaining	If using Review Term, enter the number of reviews that will need to be performed.
Header	Renewals Remaining	Only displays if Expires On is selected. If the contract contains language that defines and allows for one or more renewals, enter the maximum number of renewals allowed as specified in the contract: if unlimited, enter 99.
Header	Automatically Apply Price File and Renewal	Only displays if Expires On is selected. Leave defaulted to No. This field is currently not applicable as the price set feature is not being used.
Header	Renewal Term	Only displays if Expires On is selected. If using Renewals Remaining, enter the period that the renewal will be for.
Header	Auto-Renew	Displays if Expires On is selected. Yes = The contract will automatically renew if the contract isn't terminated in advance of the renewal in accordance with the notice requirements. No (default) = The contract will not automatically renew; action will need to be taken in accordance with the renewal terms to opt into the renewal.
Header	Auto Renew Creation	Only displays if Auto-Renew = Yes. Specify the number of days prior to renewal that a new (renewal) contract record, with the same Contract Number, should be automatically created. The renewal contract record will remain in Draft status, and no further Notifications will be triggered, until the Contract Manager Submits it. Recommendations are to set this field to the notice period required to prevent renewal, set up Renewal Date – Advance Notices under Notifications on this contract record, and opt into the Contract Renewal Auto-Created Notification under User Profile, Notifications, Contracts.
Header	Details	Allows for entry of details that can only be viewed by the Contract Manager(s) and Stakeholder(s) on this contract.
Header	Searchable Keywords	Enables the ability to search on keywords to locate this contract.
Header	General Purpose	Indicate the general purpose of the contract by clicking the checkbox of any applicable value. Even if not the primary purpose, check Technology if any form of technology will be provided, created, or will be used to deliver goods or services.
Header	Specific Purpose	Indicate a more specific purpose of the contract by clicking the checkbox of any applicable value.
Header	Other Purpose	Enter the purpose if Other is selected as the General Purpose or Specific Purpose.
Header	Enter After Fully Signed	Yes = Created this contract record after the contract was fully signed. No (or blank) = Created this contract record before the contract was fully signed.

Header	Acting By and Through	Enter any Acting By and Through or Acting Through language that is specified in the contract. Examples: Harvard University Information Technology, Harvard Business School.
Header	Lifetime Contract Value	The estimated total amount that is expected will be paid or received over the life of the contract.
Header	Key Riders	Click the checkbox of any rider that was included in or with the contract.
Header	Migrated	Leave this field blank. It is for migration purposes only.
Digital Accessibility (section only applies if General Purpose is Technology)	Accessibility Addressed	Select the most applicable value. Click on ⓘ to the right of the field name to see value definitions.
Technology Accessibility	Accessibility Rider	Only displays if Accessibility Addressed = Yes. Select the most applicable value. Click on ⓘ to the right of the field name to see value definitions.
Digital Accessibility	Accessibility Roadmap	Only displays if Accessibility Addressed = Yes. Yes = An accessibility roadmap was provided. Upload the roadmap as an Attachment. Recommend creating an Obligation to track and manage deliverables. No = An accessibility roadmap was not provided.
Digital Accessibility	Temporary Accessibility Exception Form	Only displays if Accessibility Addressed = Yes. Yes = An Accessibility Exception has been granted. Upload the exception form as an Attachment. Recommend creating an Obligation to track and manage the expiration of the exception form No = An Accessibility Exception has not been granted.
Digital Accessibility	Accessibility Product Review	Only displays if Accessibility Addressed = Yes. Click on all applicable values. Click on ⓘ to the right of the field name to see value definitions.
Digital Accessibility	Accessibility Product Review Date	Enter the date of the most recent digital Accessibility Product Review; if unknown, estimate.