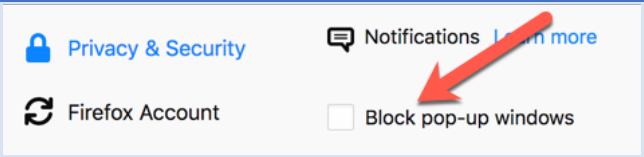
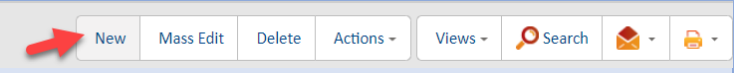
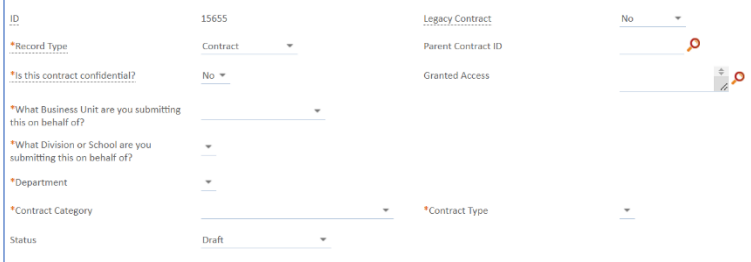
Job Aid: How to Initiate a Contract

Steps	Visual Cues
Enable Pop-ups: 1. Firefox a. Firefox – Tools > Options > Content > Block pop-up windows. b. Firefox – Preferences > Privacy & Security > Block pop-up windows. 2. Chrome a. Chrome > Preferences > Advanced > Content Settings > Pop-ups and redirects > Allowed	
Login to Agiloft: 1. Access the system from the auth.slu.edu (formerly mySLU) page with your existing credentials. 2. Choose the icon to open Agiloft.	
Initiate New Contract: 3. Click Contracts in the left pane, and then click New. Note: Remember that in a browser-based application, you cannot click "Back." Agiloft does not save records automatically. You can click "Save & Continue" to save your work.	
Fill in Intake Request Form: 4. Fill in all Intake Request Form Questions. Note: Be sure to select all required fields, which are marked with a red asterisk *. Note: If you see a magnifying glass you can click it to look up the potential values in a new window. Be sure to enable pop ups in your browser in order to see that new window. When you see the value you want to pick, click the red arrow to select the value and return to the intake form. In some cases, you may see checkboxes instead, and can check the box(es) and click "Import/Append."	

Select Counterparty Company and Contact for Contract:

5. Select whether the Counterparty is Existing in system or New to System.

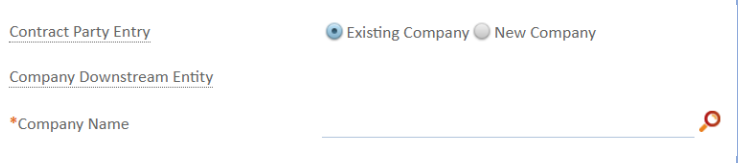
For Existing Company (previously entered into Agiloft):

6. Click on lookup icon .
7. Search for company.
8. Select company and click red arrow to select.

Once the Existing Vendor is selected, choose if the Company Contract Entry is an **Existing Contact** or **New Contact** from the dropdown menu.

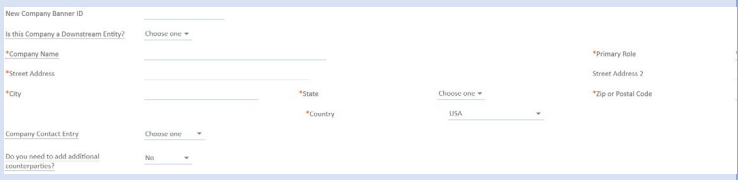
If Existing Contact, select it from the Primary Contact dropdown

If New Contact fill in additional information about the new contact



For New Company (not already in Agiloft):

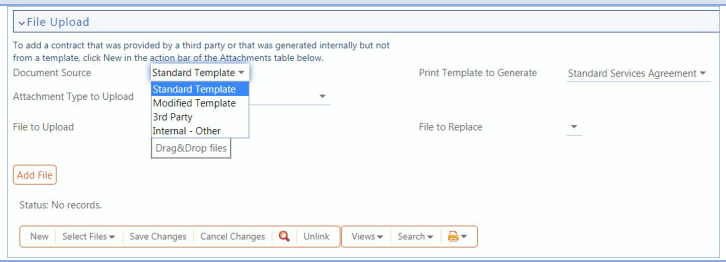
9. Enter New Company and Contact Information into the New Company and New Contact fields.

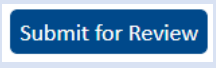


Upload Attachments:

10. Choose Document Source (SLU template or 3rd party).
11. Use File Upload tool to add 3rd party contract as an attachment if applicable, and/or any other supplemental files.

Repeat as necessary.



Submit Contract Request:

12. Click the Submit for Review button at the bottom of the form to submit the contract request and send it out for approval.