Viewing Contracts

Contracts User Guide · https://evergreenworx.com/docs/viewing-contracts/

EvergreenWorx Contracts provides multiple tools for quickly viewing, finding, and organizing your contract records. Whether you need to find a specific contract, explore contracts assigned to you, or filter down to those that require your approval, the application gives you flexibility to manage large datasets with ease.

Navigating to the Contract List

1. In the model-driven app, click **Contracts** in the left-hand sitemap.
2. The default view, **Open Contracts**, will load showing a list of contracts in a tabular format.

Switching Views

You can change the view to display a different subset of records. The dropdown at the top of the grid allows you to choose from pre-configured views, including:

- Active Contracts
- Approved Contracts
- Closed Contracts
- Contracts I am Following
- Contracts Needing My Approval
- Draft Contracts
- Expiring Contracts
- Inactive Contracts
- My Active Contracts

- My Closed Contracts
- My Draft Contracts
- Open Contracts (default)

These views are based on filters that look at attributes like system status, user relationships, or upcoming dates.

Searching for Contracts

Quick Search

You can use the quick search bar to locate contracts by keywords found in indexed fields such as Contract Title. Use the wildcard character * to search for partial strings. e.g. *Springfield*.

Dataverse Search

For a more comprehensive search experience, use **Dataverse Search**, which searches across multiple tables and fields, including related entities. Dataverse Search can be found in the top bar of the application.

Sorting and Filtering

The data grid supports standard features to help you explore the contract records more effectively:

- **Sorting**: Click on any column header (e.g., Title, Status, Effective Date) to sort ascending or descending.
- **Filtering**: Use the "Edit filters" button to apply column-based filters like "contains", "begins with", or value pickers.
- **Column Selection**: You can personalize the columns shown in the grid by selecting “Edit columns”.

These tools make it easier to find the information you need and to tailor the experience based on your role or current task.

Best Practices

- Use the **Contracts Needing My Approval** view to monitor items requiring action.
- The **Expiring Contracts** view helps you proactively manage renewal timelines.
- Combine filtering and sorting to create a temporary working set of records.
- Create custom views for department-specific needs or common workflows.

With these tools, users can quickly locate the right contracts, gain visibility into contract stages, and stay informed on their responsibilities throughout the contract lifecycle.