



myContract Training: Contract Workspace



Our Expectations from You

- Take responsibility for the success of this time investment.
- Interact with other participants and gain from their experience- Ask Questions!
- Participate and minimize distractions.
- Be on time so we can stay on schedule.



Topics

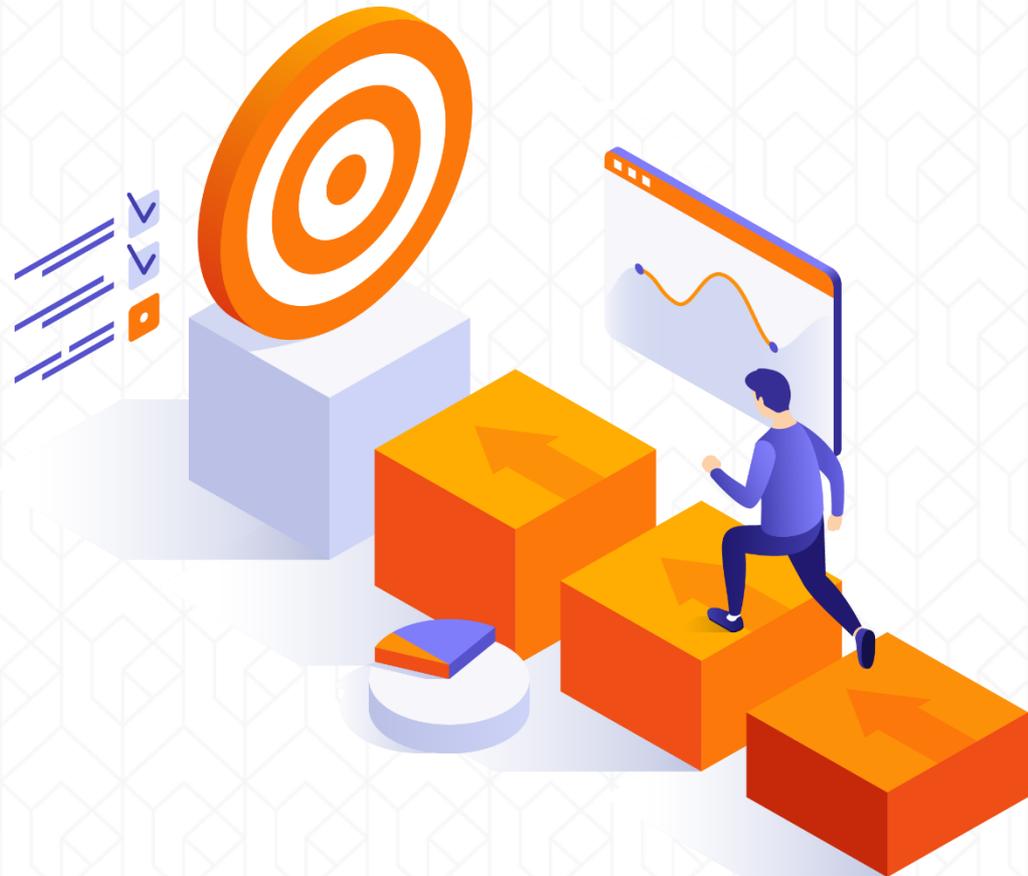
- 1 Overview
- 2 Contract Request: Triage
- 3 Contract Workspace: Initiate
- 4 Contract Workspace: Contract Creation
- 5 Contract Workspace: Negotiate
- 6 Contract Workspace: Approval
- 7 Contract Workspace : Execute
- 8 Reporting and Dashboards
- 9 Support
- 10 Summary



Training Objectives

By the end of this training, you will be able to able to:

- Describe the end-to-end Contract Management Process and the roles involved with it.
- Gain knowledge to enable yourself to work in myContract
 - ▶ Initiate a Contract Workspace
 - ▶ Identify the project team
 - ▶ Obtain Sourcing approval
 - ▶ Obtain Legal approval
 - ▶ Executing agreement
 - ▶ Publishing
- Understand the reporting functionality
- Know how to get help



Topics

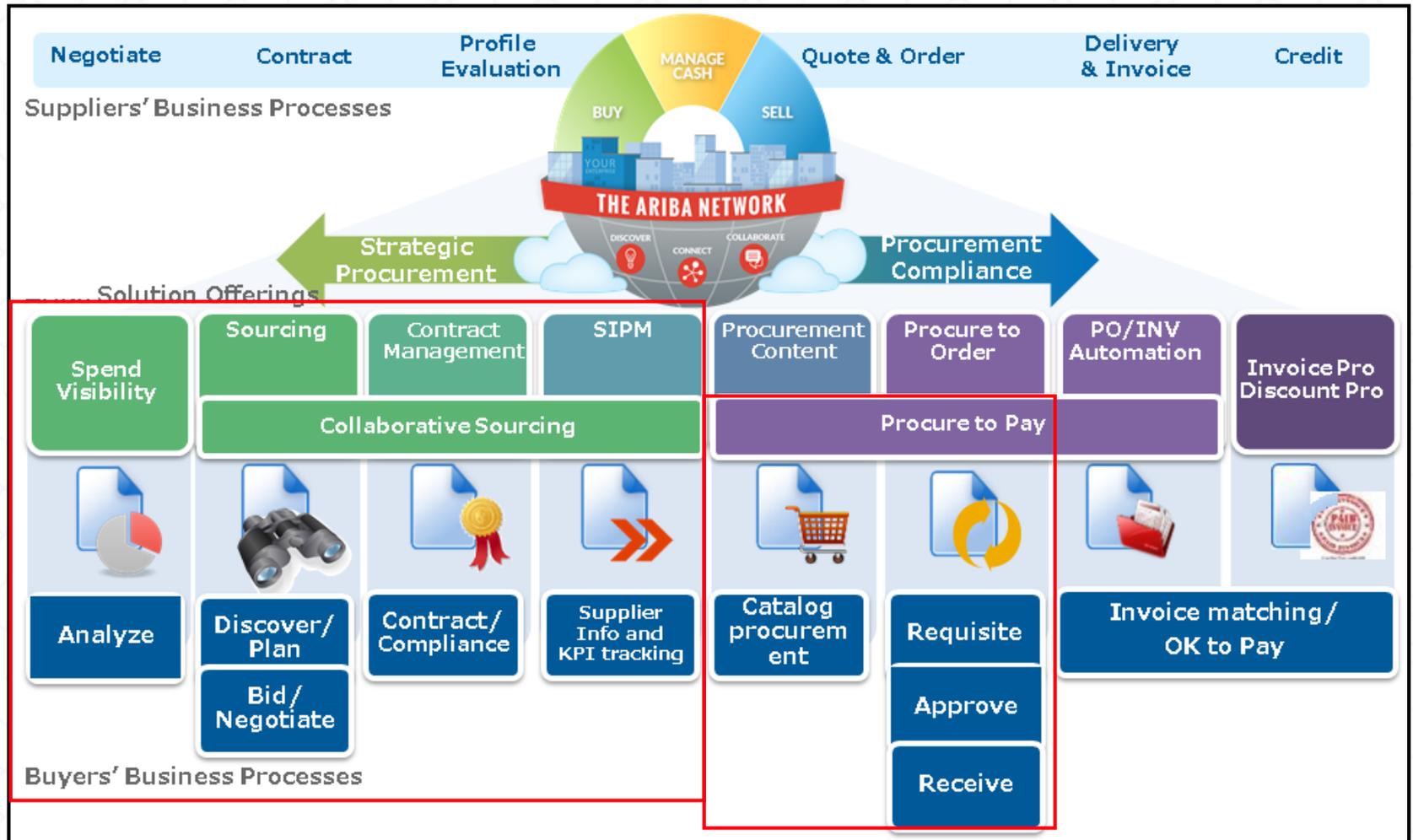
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At the end of this topic, you will be able to:

- Describe ABC
- Explain the future global platform for procurement activities
- Become familiar with the process
- Understand roles and responsibilities
- Recognize terminology

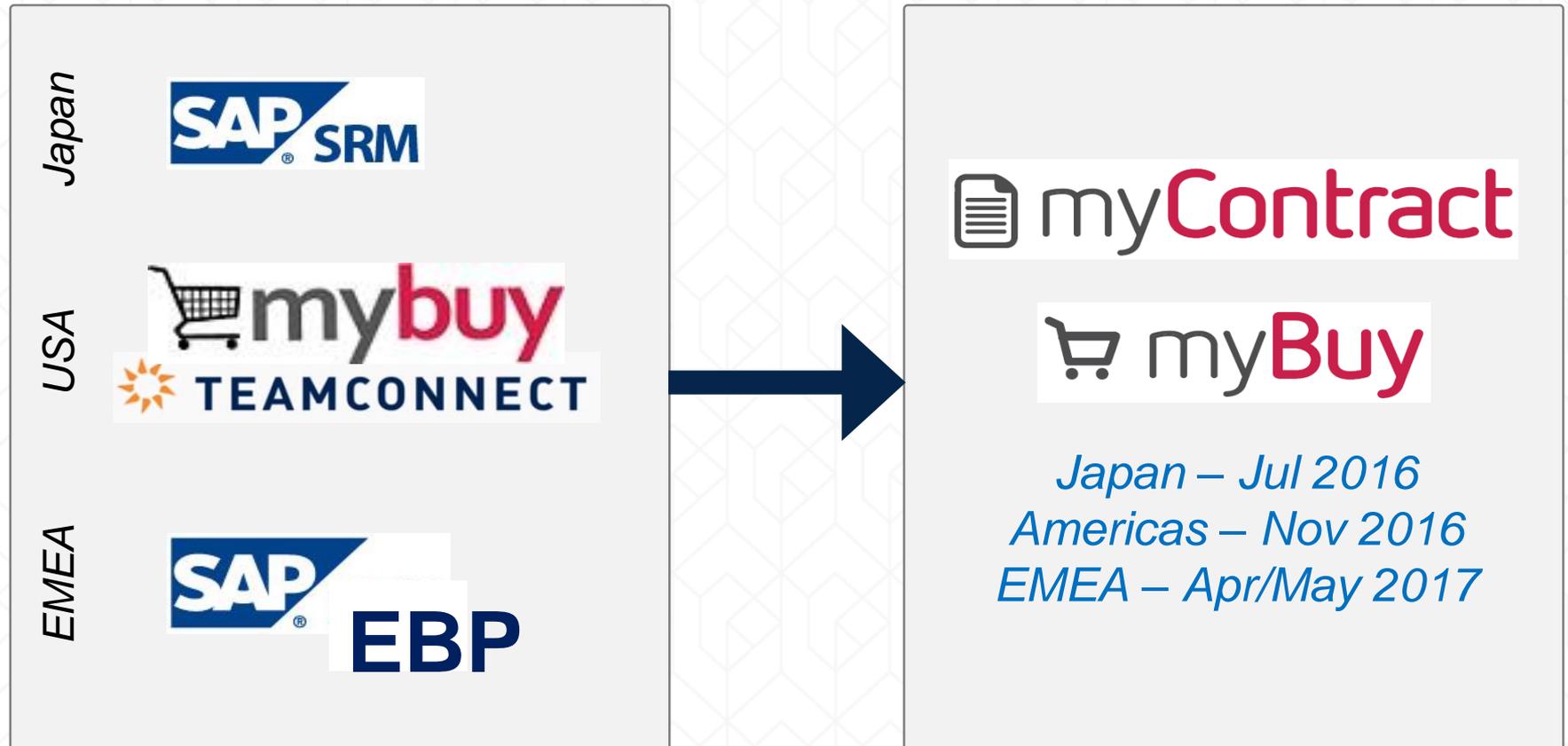
Future Global Platform for Procurement Activities

In alignment with Japan, Americas and EMEA operations are developing the global “To Be” model within the ABC “Cloud.”

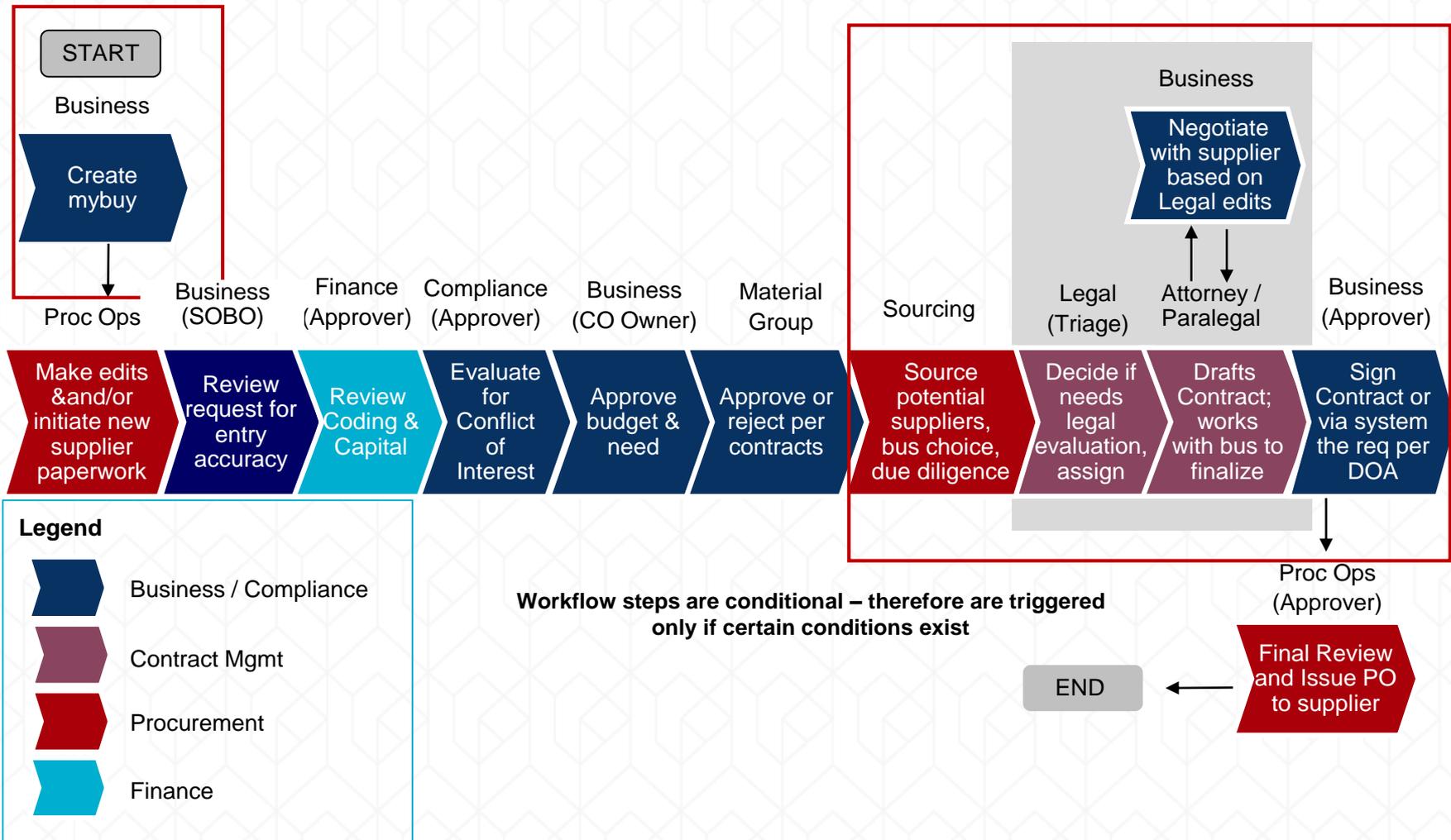


Global Solutions: The Changing Face

In the new “To Be” model, the current regional solutions will be replaced with globally aligned and branded solutions.



New Requisition—Purchase Order Process (non-catalog)



Overall Procurement Process High-Level Process Overview (Sourcing + myContract + myBuy)

Strategic Sourcing



ASSESS

- Business to proactively engage Sourcing for >\$250K expenditures

SUPPORT

- Business and Sourcing align on sourcing due diligence process

Contract Request (CR)



CREATE

- Business enters data

SUBMIT

- Business reviews and submits requests

ASSIGN

- Triage assigns Project Owner

APPROVE

- Triage reviews
 - Approve
 - Deny

Contract Workspace (CW)



INITIATE

- Review for completeness
- Determine necessary stakeholders & reviewers (if any)

REVIEW (conditional)

- If more information is required send to business for additional info

SOURCING APPROVAL (conditional)

- Send to sourcing manager for approval

NEGOTIATE

- Draft Agreement
- Negotiate with Supplier (offline)

LEGAL APPROVAL (conditional)

- Send to legal for approval

EXECUTE

- 6a – Supplier Signs
- 6b – Business Signs

PUBLISH

- Complete final data entry

Req to PO



Business enters CW ID# into Purchase Requisition (PR) (If contract required)

Business certifies their understanding that a contract is required prior to raising PO

On Behalf Of (OBO)
Finance Category, Sourcing
Cost Object Owner/Budget
Delegation of Authority (DoA)

P
O

Approval Flow

Roles within myContract (1 of 3)

The roles within myContract are:



Preparer

This role was formerly known as a Requisitioner. A preparer is a member of the business who initiates the Contract Request (CR).



On Behalf Of

This role was formerly known as Shop On Behalf Of (SOBO). The OBO is the business manager responsible for the goods or services being purchased and is responsible for obtaining the appropriate signatures on the contract document.



Triage

This individual reviews the Contract Request for completeness, assigns the appropriate Contract Workspace Project Owner, and approves the Contract Request.

Roles within myContract (2 of 3)

The roles within myContract are:



Project Owner

This role was formerly known as a Requisitioner. A preparer is a member of the business who initiates the Contract Request (CR).



Procurement Approver

This is a member of the strategic sourcing team who will ensure that proper due diligence is performed with respect supplier identification, evaluation, selection, and negotiation.



Legal Approver

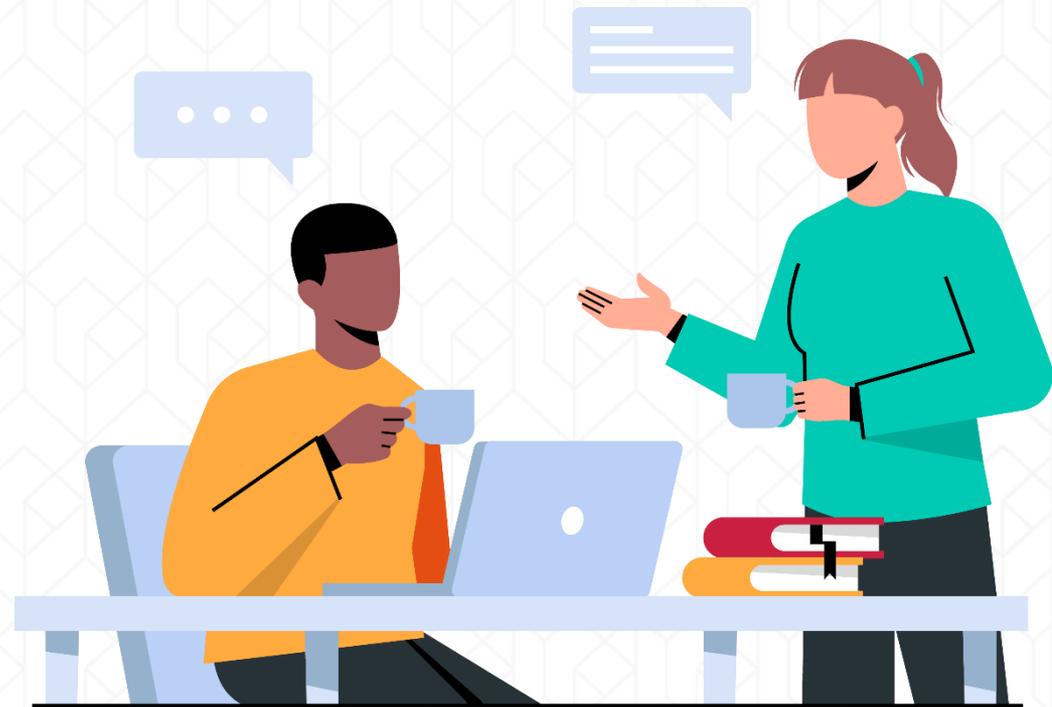
This is a member of the legal team that works closely with the Project Owner and participates in any escalation activities as necessary.

Roles within myContract (3 of 3)

The roles within myContract are:

Procurement Operations

A group within ABC who will support the supplier set-up when necessary and onboarding (new suppliers). The primary function is to support the overall purchasing process and also support end users.



Frequently Used Terminologies



- **Contract Request (CR)** is a form within myContract that the business will use to create a formal request for a contract.
- **Contract Workspace (CW)** is the contract management system within myContract.
- **Purchase Requisition (PR)** is created in myBuy when it is determined that no contract is needed or the business has uploaded a fully executed contract into the workspace.
- **Team** refers to the project team for a specific workspace.
- **Group** is a subset of the project team used to define roles and permissions related to the project.



What's In Scope?

Minimum In Scope:

Procurement Related Documents Including:

- Master Service Agreement
- Service Agreement
- Work Order/Statement of Work
- Change Order
- Amendment/Addendum

Inclusion of other documents types may vary by Region:

- Confidential Disclosure Agreements (CDAs)

Check Your Understanding



Which of the following roles is responsible for facilitating the project through the process within myContract?

- a. Triage
- b. Preparer
- c. Project Owner

Answer:

c. Project Owner



Contract Request Process

Contract Request: Introduction

Contract Requests are the starting point for the business to launch the contracting process. The Contract Request form will aid end users in assessing whether a contract is required. If not required, the end user will be directed to my Buy.

Contract Request

CREATE

- Business enters data



SUBMIT

- Business reviews and submits requests



ASSIGN

- Triage assigns Project Owner



APPROVE

- Triage reviews
 - ▶ Approve
 - ▶ Deny

Contract Request Workflow

The Contract Request process involves the following steps:



	CREATE	SUBMIT	ASSIGN	APPROVE
Preparer / On behalf of	<ul style="list-style-type: none"> Enter data Answer questionnaire Click create 	<ul style="list-style-type: none"> Enter due date and notes Attach documentation Click Submit 	<ul style="list-style-type: none"> If rejected, correct and complete Resubmit 	
Triage			<ul style="list-style-type: none"> Adds assigned project owner to task 	<ul style="list-style-type: none"> Reviews for completeness <ul style="list-style-type: none"> Approve Deny
Project Owner				<ul style="list-style-type: none"> Receives email notification Opens CR, clicks “Initiate Contract Workspace”

Create a Contract Request: Scenario



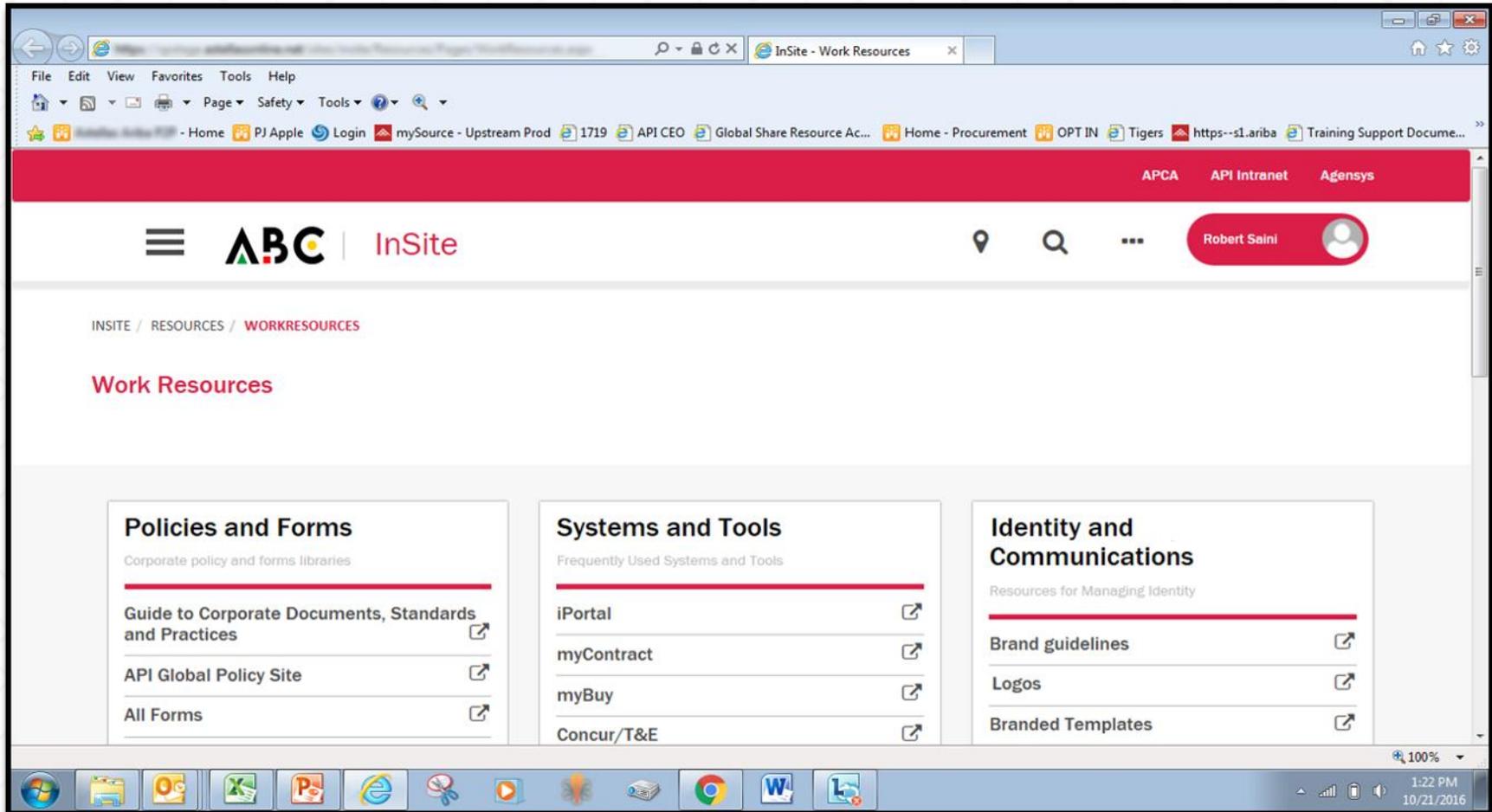
Jane has the responsibility of creating a contract request. This scenario will allow the Preparer to view what occurs within the tool when a contract is needed, and when it is not.

Here are the list of tasks that she needs to perform:

- Create a Contract Request where contract is not required.
- Create a Contract Request where contract is required.

Login to myContract

Use your SSO login credentials to login to ABC.



myContract Page

After logging in you will see the home page for myContract. Click **CONTRACTS** tab.

The screenshot displays the myContract home page. At the top, the navigation bar includes the myContract logo, user information (Smita Sharma), and site details (Astellas Admin - TEST). The main navigation tabs are HOME, SOURCING, **CONTRACTS** (highlighted with a red box), PROCUREMENT, and MORE... On the right of the navigation bar are links for Recent, Manage, and Create.

The left sidebar contains a 'Common Actions' menu with options like 'Create Sourcing Project', 'Contract Workspace (Procurement)', and 'Manage Core Administration'. Below this is a 'Recently Viewed' section listing items like 'Untitled Con...ement) Demo00' and 'test shatarupa workspace'.

The main content area features a search bar and a notification banner: 'We have a new visual design. Click here to learn more! Get the most out of the new dashboard. Click here to find out how.' Below the banner are four dashboards:

- Event Status:** A donut chart showing 7 total events, with 2 Draft, 5 Open, and 0 Pending.
- Supplier Approvals:** A bar chart showing 1 Rejected, 13,617 Approved, and 3 In Reg.
- My Tasks:** A bar chart showing 3 Overdue, 2 This Week, and 5 This Month.
- Expiring Contracts:** A bar chart showing 4 Expired and 1 30 Days.

Below the dashboards is a 'News' section with the headline 'Stratus Workshops Currently Underway'. At the bottom, there are two tables: 'My Documents' and 'To Do'.

My Documents		
Title	Date ↓	Status
test shatarupa workspace	10/10/2016	Draft
Test Sourcing Project	10/8/2016	Planned

To Do		
Date ↓	Status	Title
11/30/2016	Not Started	Find Supplier for XYZ (Test Sourcing Project)
10/31/2016	In Review	Review for Ariba_Content_Outline_Sep30.xls (Test Sourcing Project)

Tabs Within myContract Page

The following tabs are visible on the Contract Request and Workspace:

Overview – This tab provides a summary of header details and quick links to key areas of the project

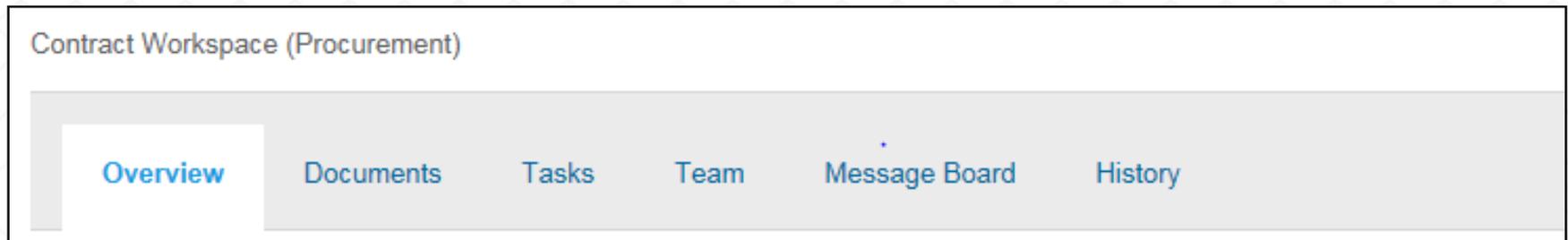
Documents – This tab houses the documents associated with the specific workspace, including the contract itself (initially titled Main Agreement)

Tasks – This tab outlines the steps/tasks (and associated owners of each task) of each project from beginning to end. The status of the process flow can be tracked in detail here.

Teams – This tab is used to assign roles (assigning individual team members to project groups) within the specific project.

Message Board – This tab can be used to house additional communication between project team members (documents can also be sent to the message board).

History – This tab displays a detailed view of changes by each project team member, updates can be filtered through search parameters.



Create Contract Request (1 of 7)

To create a Contract Request, you need to:

1. Click Create on the home page.
2. Select Contract Request (Procurement) from the drop-down menu.

The screenshot displays the myContract application interface. The top navigation bar includes 'HOME', 'SOURCING', 'CONTRACTS', 'PROCUREMENT', and 'MORE...'. The user's name 'Smita Sharma' is visible in the top right corner. A red box highlights the 'Create' button in the top right corner, with a circled '1' next to it. A dropdown menu is open, showing various options. A red box highlights the 'Contract Request (Procurement)' option, with a circled '2' next to it. The main content area features several dashboards: 'Event Status' with a donut chart showing 7 items (3 Draft, 5 Open), 'Supplier Approvals' with a bar chart showing 13,618 items (1 Rejected, 3 In Reg, 3 Approved), 'News' with the headline 'Stratus Workshops Currently Underway', 'My Documents' with a table of documents, and 'To Do' with a table of tasks. The 'To Do' table has the following data:

Date ↓	Status	Title
11/30/2016	Not Started	Find Supplier for XYZ (Test Sourcing Project)

Create Contract Request (2 of 7)

A create Contract Request (Procurement) page opens.

The screenshot shows the 'myContract' application interface for creating a procurement contract request. The page title is 'Create Contract Request (Procurement)'. At the top right, there are navigation icons for home, chat, help, and the user name 'Smita Sharma'. Below the title, there are 'Create' and 'Cancel' buttons. A help text states: 'To create a Procurement Contract Request, specify the fields below. Templates used for constructing your Procurement Contract Request appear in the section at the bottom of the page, and available Templates. More'. The form contains the following fields:

- Name: Text input field with a 'Translations' icon.
- Description: Text area with a 'Translations' icon.
- Copy from Contract: Dropdown menu with '(no value)' selected.
- Test Project: Radio buttons for 'Yes' and 'No'.
- Regions: Dropdown menu with '(no value)' selected.
- Base Language: Dropdown menu with 'English' selected.
- Supplier: Dropdown menu with 'No value' selected.
- Affected Parties: Dropdown menu with '(no value)' selected.
- Proposed Contract Amount: Text input field with 'USD' as a unit.
- Commodity: Dropdown menu with '(no value)' selected.
- Astellas Entity: Dropdown menu with 'No Choice' selected.
- Agreement Date: Date picker.
- Term Type: Dropdown menu with 'Fixed' selected.
- Effective Date: Date picker.
- Expiration Date: Date picker.

A vertical 'Feedback' button is located on the right side of the form.

Create Contract Request (3 of 7)

3. Fill out the fields requiring inputs as seen in the screenshot below. You can select any supplier and commodity from the options available in the list.

myContract Test Site Help Megan Smith(Genpact)

Create Contract Request (Procurement) Create Cancel

To create a Procurement Contract Request, specify the fields below. Templates used for constructing your Procurement Contract Request appear in the section at the bottom of the page, and available Templates [More](#)

Name: * **3**

Description:

Copy from Contract:

Test Project: * Yes No ⓘ

Regions: * Add more

Base Language:

Supplier: ⓘ

Affected Parties: ⓘ

Proposed Contract Amount: * USD+

Commodity: *

Agreement Date:

Term Type: * ⓘ

Effective Date: * ⓘ

Expiration Date: ⓘ

Create Contract Request (4 of 7)

4. Click **Select** to add **On Behalf Of**.

On Behalf Of (OBO) is the individual for whom the Preparer is submitting the request. If the Preparer is submitting their own request, they should select their own name in this field.

Astellas Entity: * A

Department: 18f Add more

Predecessor Project: (no value)

Study Number:

On Behalf Of: * (select a value) [select] ⓘ

If your contract request is specific to a Clinical Study, please provide the project code/ISN

Select a template

Select the template you want to use, and answer any questions related to it to create your project. How you set the fields in the section above might affect which templates are available.

Contract Request

Contract Request Americas

Copy of Contract Request

Create Cancel

SAP Ariba

Feedback

Create Contract Request (5 of 7)

5. Select a name from the list that appears. You can select any name from the drop-down.
6. Click **Done**.

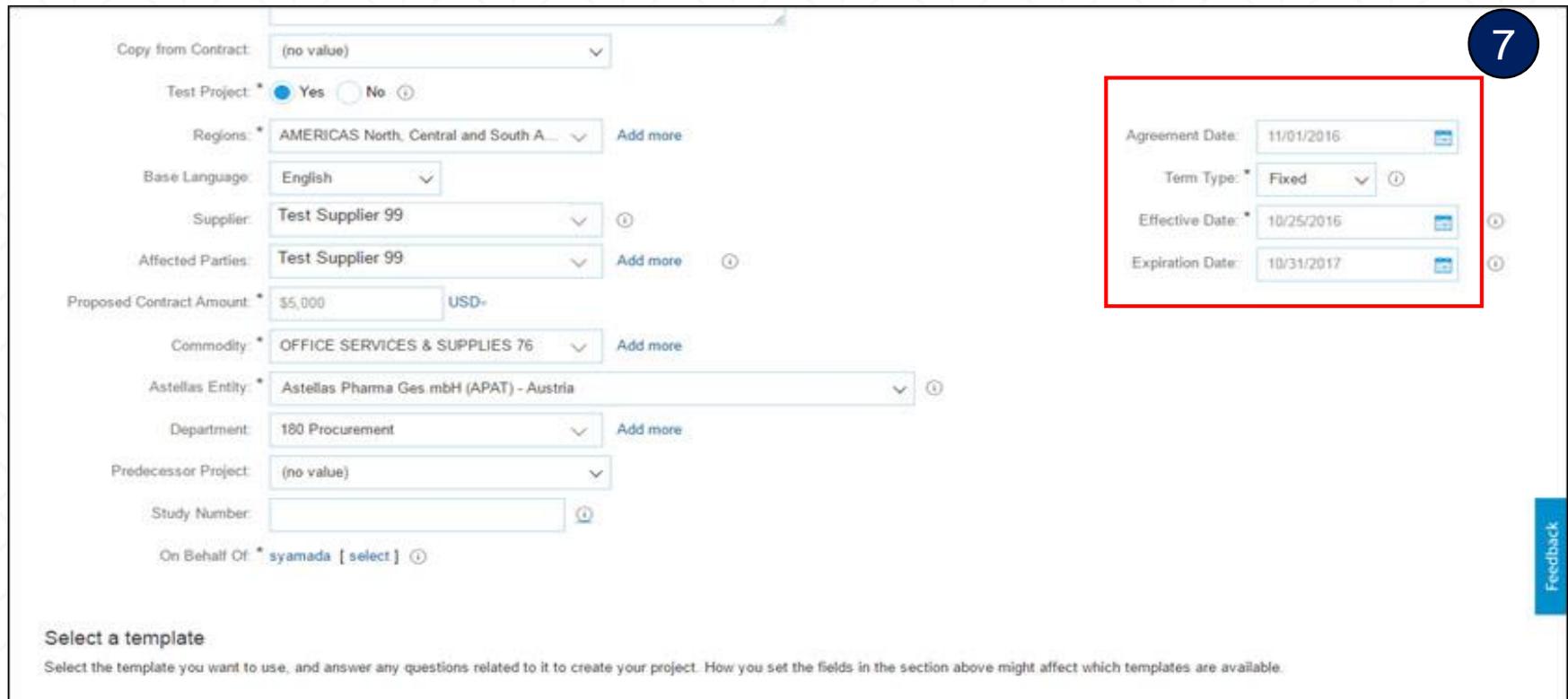
The screenshot displays a software interface with two main sections: "Add to Currently Selected" and "Currently Selected".

Add to Currently Selected: This section features a search bar with a "Name" dropdown, an input field, and a "Search" button. Below the search bar is a table with the following columns: "Name", "Email Address", "PasswordAdapter", and "Phone Number". The table contains several rows of data. A red box highlights the first row, which has a checkmark in the "Name" column. A blue circle with the number "5" is positioned to the left of this row.

Currently Selected: This section has a header with a search bar and columns for "Name", "Email Address", "PasswordAdapter", and "Phone Number". The main area of this section is empty, displaying "No items". A blue circle with the number "6" is positioned to the right of this section, above a blue "Done" button.

Create Contract Request (6 of 7)

- Input the term details and timing expectations related to your contract, if available.
 - The effective date should be a target contract start date. If the term type is unknown, please leave as fixed.



Copy from Contract: (no value) v

Test Project: Yes No ⓘ

Regions: AMERICAS North, Central and South A... v Add more

Base Language: English v

Supplier: Test Supplier 99 v ⓘ

Affected Parties: Test Supplier 99 v Add more ⓘ

Proposed Contract Amount: \$5,000 USD-

Commodity: OFFICE SERVICES & SUPPLIES 76 v Add more

Astellas Entity: Astellas Pharma Ges mbH (APAT) - Austria v ⓘ

Department: 180 Procurement v Add more

Predecessor Project: (no value) v

Study Number: ⓘ

On Behalf Of: syamada [select] ⓘ

Agreement Date: 11/01/2016 ⓘ

Term Type: Fixed v ⓘ

Effective Date: 10/25/2016 ⓘ

Expiration Date: 10/31/2017 ⓘ

7

Select a template

Select the template you want to use, and answer any questions related to it to create your project. How you set the fields in the section above might affect which templates are available.

Feedback

Create Contract Request (7 of 7)

8. Select **Contract Request Americas**.
9. Change the answer to **Yes** to the first Question displayed “Is your request any of the following?”
10. Exit the Contract Request and proceed to my Buy.

Select a template

Select the template you want to use, and answer any questions related to it to create your project. How you set the fields in the section above might affect which templates are available.

Contract Request

Contract Request Americas

Copy of Contract Request

Is your request any of the following? - (1) Catalog Item; (2) Item that is an eligible expenditure via the T&E or Procurement card programs; (3) Increased PO value on an existing Time & Materials contract, with no other changes.

Yes

No

Please Select

Contract not required

Feedback

Thank you

BASED ON YOUR RESPONSE(S), THIS MYCONTRACT REQUEST DOES NOT REQUIRE FURTHER REVIEW. THEREFORE, PLEASE SELECT "CANCEL" BELOW TO END THIS REQUEST. AT THIS POINT, YOU MAY NOW CREATE A MYBUY REQUISITION.



Thank You

ABC