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.

ABC

Topics

ABC

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

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Topics

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

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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."
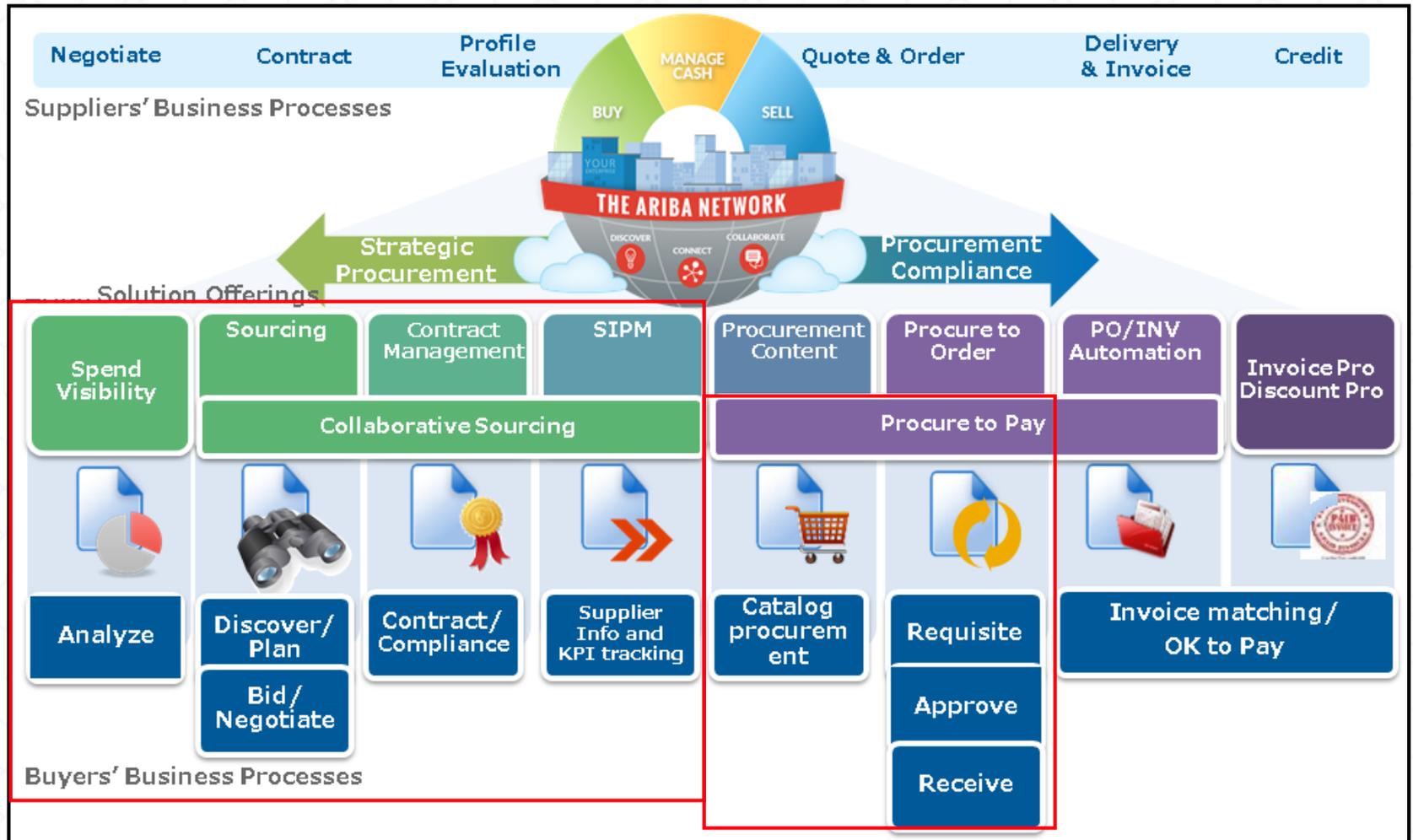
Global Solutions: The Changing Face

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

Japan – Jul 2016
Americas – Nov 2016
EMEA – Apr/May 2017
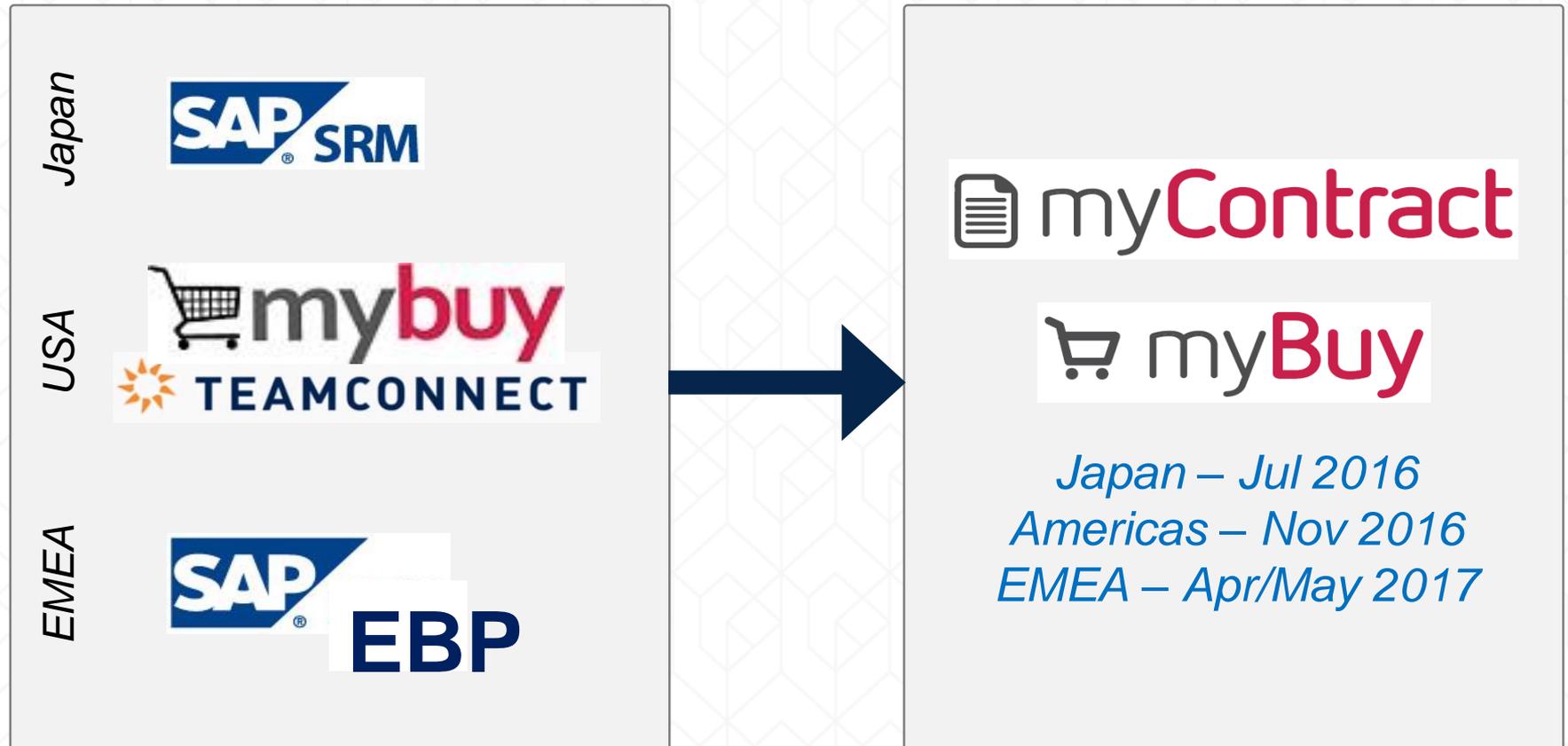
New Requisition—Purchase Order Process (non-catalog)

START

Business

Create mybuy

Proc Ops

Make edits &and/or initiate new supplier paperwork

Business (SOBO)

Review request for entry accuracy

Review Coding & Capital

Finance (Approver)

Compliance (Approver)

Evaluate for Conflict of Interest

Business (CO Owner)

Approve budget & need

Material Group

Approve or reject per contracts

Sourcing

Source potential suppliers, bus choice, due diligence

Business

Legal (Triage)

Negotiate with supplier based on Legal edits

Decide if needs legal evaluation, assign

Attorney / Paralegal

Drafts Contract; works with bus to finalize

Business (Approver)

Sign Contract or via system the req per DOA

Proc Ops (Approver)

Final Review and Issue PO to supplier

END

Legend

- Business / Compliance
- Contract Mgmt
- Procurement
- Finance

Workflow steps are conditional – therefore are triggered only if certain conditions exist

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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)   📄 myContract

CREATE
- Business enters data

SUBMIT
- Business reviews and submits requests

ASSIGN
- Triage assigns Project Owner

APPROVE
- Triage reviews
  - Approve
  - Deny

Contract Workspace (CW)   📄 myContract

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   🛒 myBuy

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)*

Approval Flow

P O

ABC

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.

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.

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.
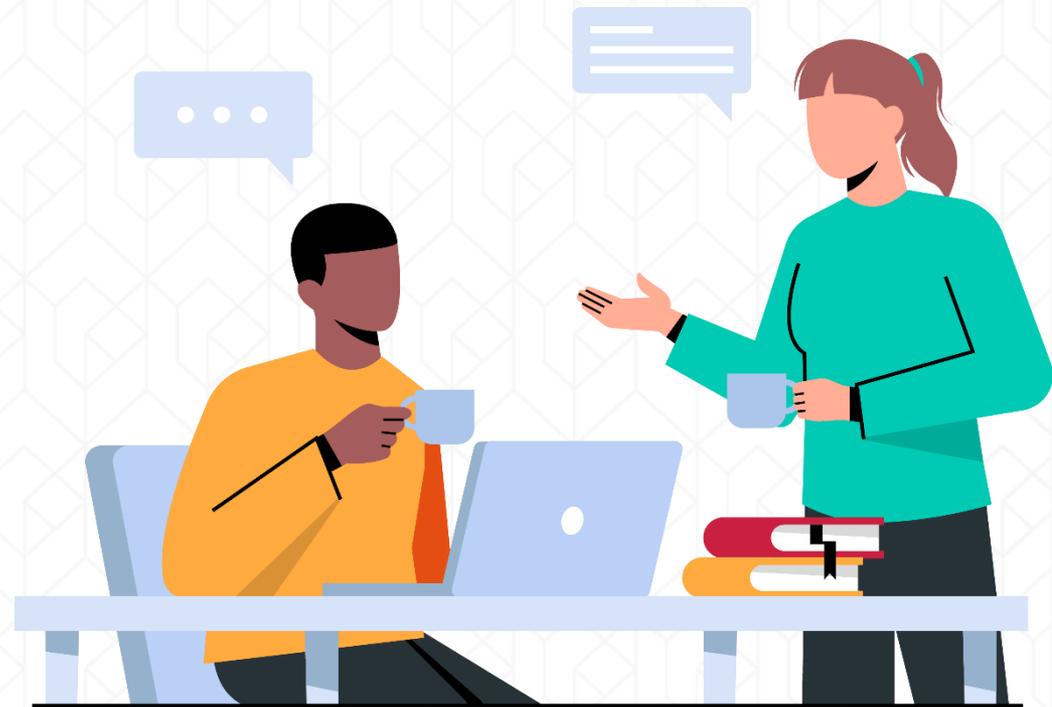
Frequently Used Terminologies

- **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.

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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)

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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

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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 aide 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	• Enter data • Answer questionnaire • Click create	• Enter due date and notes • Attach documentation • Click Submit	• If rejected, correct and complete • Resubmit	
Triage			• Adds assigned project owner to task	• Reviews for completeness ▶ Approve ▶ Deny
Project Owner				• 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.

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Login to myContract

Use your SSO login credentials to login to ABC.

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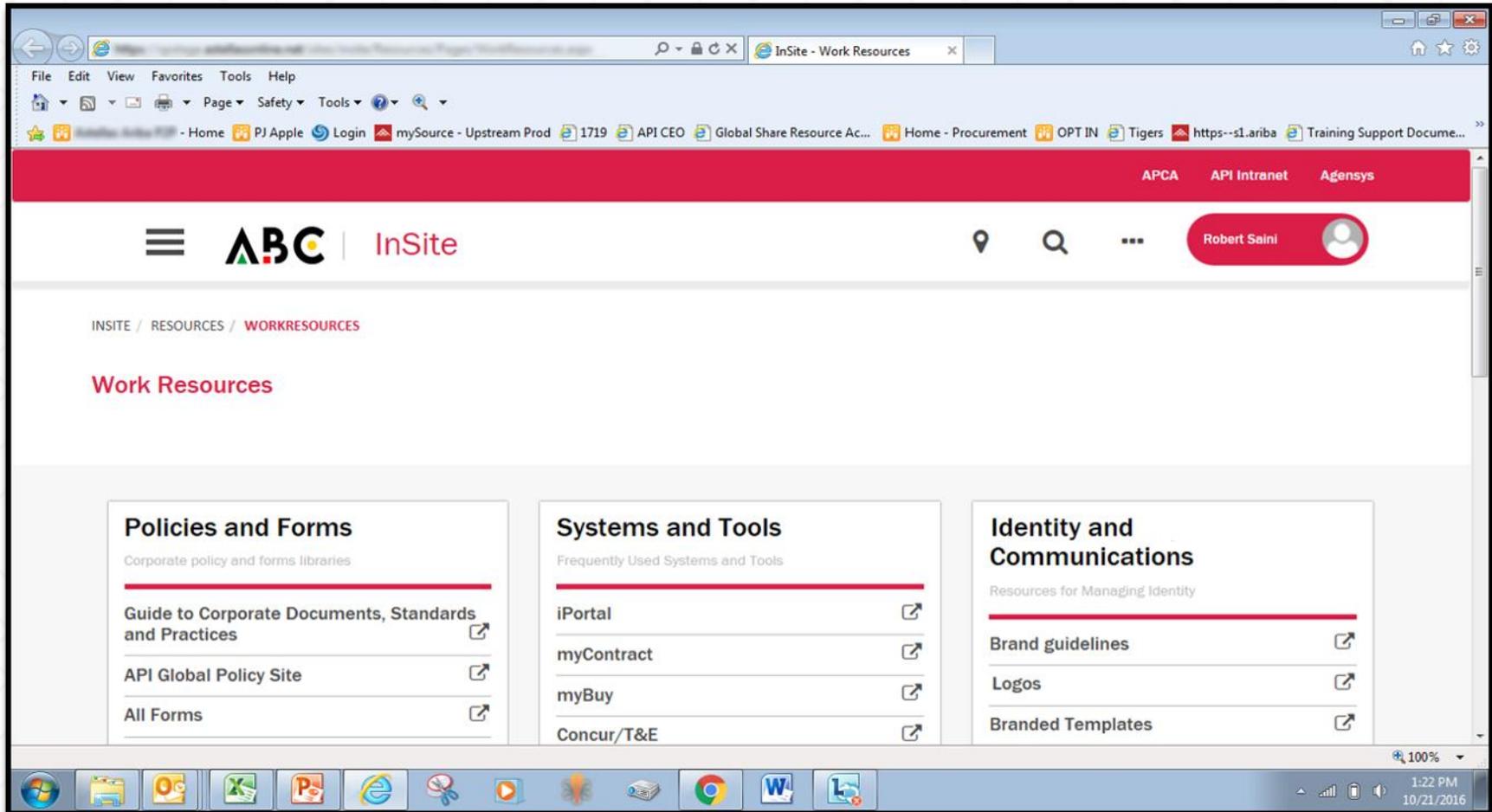
myContract Page

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

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.

Contract Workspace (Procurement)

Overview	Documents	Tasks	Team	Message Board	History

ABC
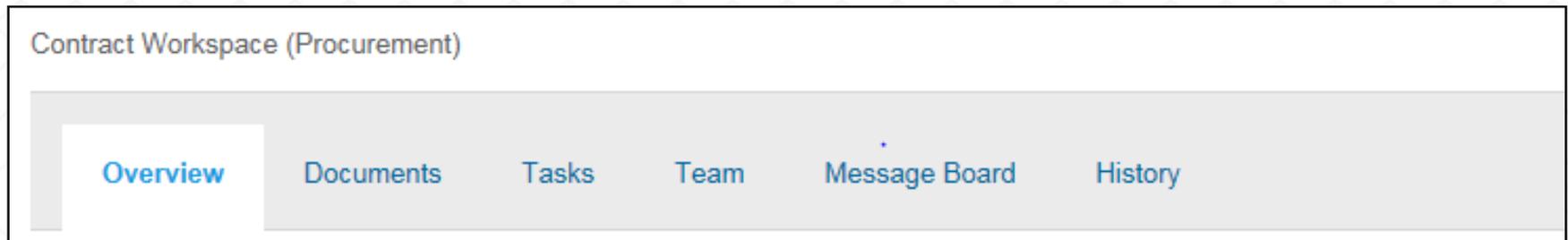
To create a Contract Request, you need to:

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

A create Contract Request (Procurement) page opens.

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.

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.

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

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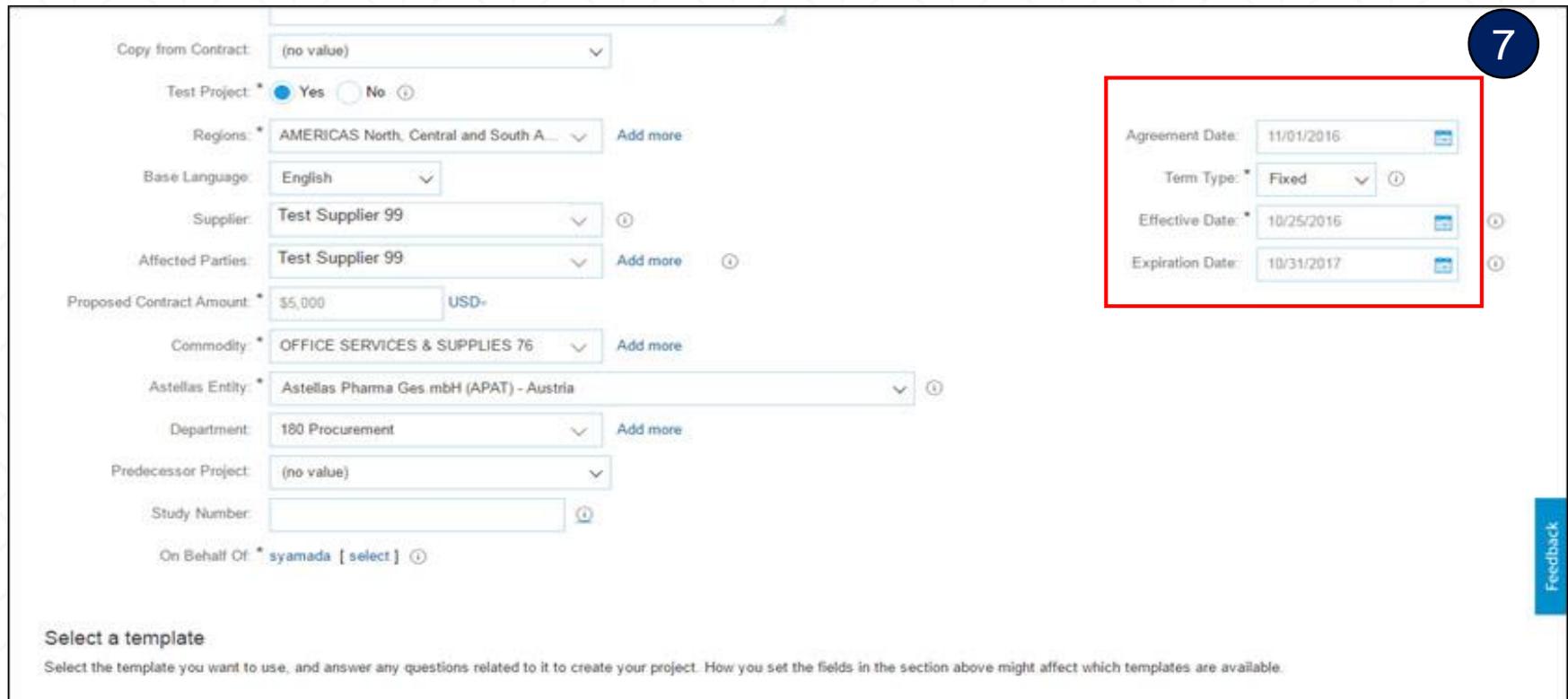
8. Select **Contract Request Americas**.
9. Change the answer to **Yes** to the first Question displayed "Is your request any of the following?"
10. Exit the Contract Request and proceed to my Buy.

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

8

● Contract Request Americas

Contract not required

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.

Please Select

9

Yes

Feedback

No

○ Copy of Contract Request

Please Select

10

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

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Thank You

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