SAP Ariba User Script Contract Management

Contribution	Name	Role
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Design/Review	Presales Team	Presales Partner Enablement

Contents

Requirements

Requirement 01

Access to SAP Ariba Shared Partner Demo realm
http://Cumulonimbus-t.procurement.ariba.com/
- If you do not have an access to shared demo realm please contact your PSA. To identify who is you PSA (Partner Service Advisor), please look on page: https://partneredge.sap.com/en/partnership/manage/benefits/psa.html

Access to Ariba Network
http://supplier.ariba.com

Requirement 02

User ID and Password for Demo realm as and end user.
The SAP Ariba Shared Partner Demo site is available to SAP Ariba authorized partner only. To request new access to the shared demo site, contact your PSA (Partner Service Advisor). To identify your PSA: https://partneredge.sap.com/en/partnership/manage/benefits/psa.html

URL to get details of supplier credentials to process RFP, purchase orders etc.
https://jam2.sapjam.com/blogs/show/qt4LMxdPQ20TJaTs8beE0L

URL to get Supervisor credentials to approve purchase requisition
https://jam2.sapjam.com/blogs/show/qt4LMxdPQ20TJaTs8beE0L

Enhanced Contract Authoring

Step 01 Login

Go to
http://Cumulonimbus-t.procurement.ariba.com/
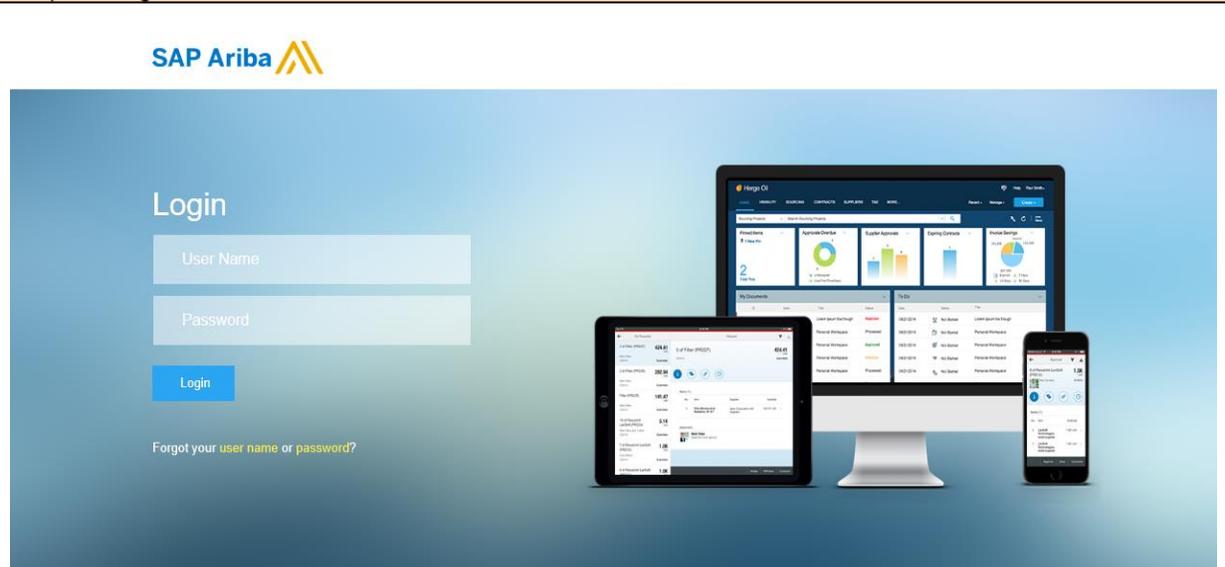
And Log-in using your Demo user ID (your company email id) and password.

Step 02 Enabling Enhanced Contract Authoring

This feature is disabled by default. To **enable** this feature, please have your **Designated Support Contact** log a service request. A SAP Ariba **Customer Support** representative will follow up to complete the request. If you enable this feature, you will be redirected to the new contract authoring workflow with drag-and-drop document imports, seamless editing, and simplified clause management.

Overview of enhanced contract authoring features:

SAP Ariba provides enhanced contract authoring with drag-and-drop document imports, seamless editing, and simplified clause management. The enhanced contract authoring workflow provides a simplified, intuitive, platform-independent interface while eliminating many of the limitations inherent in the previous workflow. The enhanced contract authoring features are not supported for Ariba Contract Management Basic users. Following are the highlights of this enhanced interface:

- Open-XML based, bookmark-free document formatting Previously, you needed to add bookmarks to your contract documents (main agreement and contract addendums) to identify clause boundaries. Now, you can format documents using any Open-XML based editor and use document styles to identify clause boundaries.
- Drag-and-drop document imports Previously, you needed to create a Desktop File Sync (DFS) folder on your system and periodically sync document updates from the local folder to the server. Now, you only need to drag-and-drop documents directly into the application, and your dropped files are automatically available on the server.
- Simple, in-application redlining and editing Previously, comparing and merging contents of main agreements after internal or external edits invoked an external application with a three-way merge

window. Now, the three-way merge window is replaced with a simple in-application redlining view that allows you to view and document changes quickly.

- Server-side document assembling and generation with no Desktop File Sync (DFS) or dependency on the Internet Explorer browser. The use of DFS in the previous contract authoring workflow required ActiveX controls, which presented security vulnerabilities and required Internet Explorer. Since DFS and ActiveX are no longer used, you are free to use a variety of browsers.

For more details please refer to SAP Ariba Product Documentation: "**Enhanced contract authoring**"

Create a Contract Request

Step 04 Create a Contract Request
The first process that can be implemented with SAP Ariba **Contract.**   Solutions is that in order to create a contract workspace, the need for a contract is requested by the end users through the functionality "**Contract Request**" – there's no license behind this feature, so it can be used by any person in the customer's organization.   1. Using the main "**Create**" blue button, use the option "**Contract Request (Procurement)**" to create a new request.   **Note**: A requester can create a contract request which will be sent for approval. Once the request has been reviewed and approved, the contract team can take the request further. This ensures that contract team only comes into the loop when the request has been approved.

Step 05 Create a Contract Request

1. The Create **Contract Request Overview** screen will be displayed.
2. Enter Name**: Demo User X – Agreement Request – Today's Date**
3. Provide a Description
4. Enter the necessary dates, such as **Agreement Date**: today | **Effective Date**: today | **Expiration Date**: next year.
    i.   Term Type may remain **Fixed**. Enter a Notice Period.

5. Select the "**Demo Contract Request Template**" and click **"Create".**

Step 06 Review contract request

1. Your new **Contract Request** is displayed. Please review the information provided in the **Overview, Contract Attributes, Contract Term Attributes, Tasks** and **Documents.**
2. You may also select to view space in "**Compact View**" by clicking on the **Actions** menu in the **Overview** window and selecting **Compact View**.

Step 08 Complete Tasks

1. Administrators of the system (or template managers such as partners) can configure dynamic approval flows based on the request submitted, contract attributes, processes, etc. This template includes an approval task so that the **Contract Manager** group is notified of a new request. We're going to start that approval process Click on the icon of the **Approval** for Contract Request on task, and then on the **"View Task Details"** link.

Step 09 Complete Tasks

TSK2383185262 Approval for Contract Request — Round 1: Not Started

1. ► Demo User SH - Agreement Request - Apr 23 ∨

2. Specify Due Date
   - ○ Days after parent phase starts: None
   - ● Fixed Date: 04/23/2020

3. Provide an initial message and click Submit

   [Text editor toolbar: B I U ... 1 (8 pt) ... — font — A ...]

   please review it and ...

   Additional Attachments...

4. **Submit**

   Properties | Task History | **Approval Flow**

   Submitted → Pending → Approved
   - Add Serial Approver
   - Add Parallel Approver

1. Provide a **Due Date**
2. Include a message for the approval.
3. Click on the **Approval Flow** tab. Note a Contract Manager is indicated; however the system allows requesters to pull in additional approvers if needed. If you click on the arrow before or after the Contract Manager, you can add more approver if necessary.
4. Finally click **Submit** to start the approval flow and notify the approvers.

5. If you **View Task Details"** link again you will see the workflow approval and also who is going to approve it.

Step 10 Complete Tasks

To approve the request, you can approve it using your own user, but you could also log in as an approver part of the Contract Manager group; in this case, user "Supervisor User" – see login details in '*Requirements 02":* Click on the title of the **Approval** for Contract Request task, and from the **Action** menu, select **Approve**. (Please note it may take a few moments for the Approve link to appear. Press F5 to refresh the application.)

Approval Task

This task has been submitted for document approval. If you are the task approver, you may either Approve or Deny this task. Clicking Approve accepts one or more documents

Demo User SH - Agreement Request - Apr 23   /   **Approval for Contract Request**

TSK2385427622 Approval for Contract Request

salvador.henriquez@sap.com
please review it...

  ☑   Demo User SH - Agreement
        Request - Apr 23 ⌄

One or more documents have been su
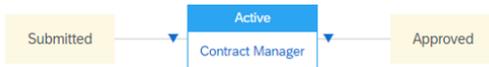
- View the documents on the left.

Deny   ⓘ

Approve   ⓘ

Properties	Task History	Approval Flow

Submitted ▼ | **Active** / Contract Manager | ▼ Approved

On the next screen confirm the approval by clicking **OK**.

1. Logout as a Supervisor.

Initiate Contract Workspace from Contract Request

Step 11 Initiate Contract Workspace from Contract Request
1. Login with your user and open the contract request. 2. From the "**Contract Attributes**" section, we can now see that the Process has been approved 3. In the **Documents** section, we can now see that a **Contract** placeholder is now visible – this is due to the fact that template was conditioned to only show that document when the process is approved. (Wait for a few moments and press F5 to refresh if the Contract document does not appear).Click on the Contract document, and then on the link "**Open**"

4. An **Overview** screen will appear to create the contract, and you can verify that the header fields have already been auto-populated from the Contract Request. You could then modify the title and complete the selected fields in red box.

5. Scroll down and select the template and create the contract from here.

Collaborate on a Contract Workspace

1. After clicking on the "**Create**" button, the system uses the contents of the template to generate the contract documents; one this is done, then the new Contract Workspace is displayed.
2. Note that the contract workspace is shown using the Compact View – you can keep that view or click on the Actions button and display the "**Full View**" to see the different tabs available.
3. You can also notice that the assembled document called "**Main Agreement**" is in "**Draft**" mode, which means that the template has already creating a first draft of the document that can be used as base for the contract.

Step 13 Review Contract Workspace

1. Note the tabs which organize the different areas of the Contract Workspace.
   - The **Overview** tab provides a summary of the project. Take a moment to review the information on the Overview tab and click on the other tabs.
   - The Documents tab contains the **Main Agreeme**nt as well as additional document i.e. Schedule related to the agreement.
   - The Tasks follow contract creation process within an organization and provide steps. The **Team** tab grants individuals access to a Contract Workspace. Access can be limited based on permissions, roles and groups.
   - The **History** tab provides a detailed activity log within the individual workspace.
2. From the **Overview** tab Click **Actions**, then select **Edit Overview**.

Step 13 Review Contract Workspace

1. Click on the **Template Questions** tab. Note that you can change these answers to alter the workspace. **Don't change the answer**. Return to the **Overview** tab.

2. Note that the Contract Workspace is assigned an **Owner**.
3. Click the **Access Control** drop-down menu arrow, then click Search for more…
   - Note the different security options. This is just one of the ways that access to contracts can be controlled. Click **Done**.
4. Click **Cancel** on the Edit screen

Note: the **History** tab. The History tab tracks changes or activities, such as attribute changes or actions on documents, providing visibility who did what and when within a project. This feature searches the database log to monitor user login activities and actions and is particularly useful for tracking edits and approvals of changes

| Step 14 | Select Team Members |

1. By clicking on the **Tasks** tab, you can have a look at the process set-up in this template, and you can see that the first task is to update the team members of this contract
2. Go the **Team** tab, review the project groups defined at the template level, and click on the blue "Actions" button, and then select **Edit**.
3. To the project group "**Contract Manager**", you can add your own user to those groups.

For the **category manager and Business Unit**, click on the drop-down, and then click on **Search** more…, search for **"Supervisor User"** and select the user called **"Supervisor User (Ariba-SAP)"** to add it to the project Group.

Click the blue "**OK**" button once finished.

Step 15 Select Team Members

1. Click on the **Tasks** tab then on the "**Update Team Members**" task and select **Mark Complete** from the pop-up.
2. The task is now **complete,** and a blue check mark is displayed.
3. Now, extend the following Phase called **"Negotiation and Review"**; the first task is **"Internal Review for Main Agreement"**, and a document called "**Main Agreement**" is associated to it. Click on the "**Main Agreement**" link, and from the menu, choose **View Details.**

SH, aqui

Step 16 Draft and Review internally Agreement

1. The document is parsed into clauses, allowing you to perform several actions such as highlighting non-standard clauses, editing, substituting, viewing clause versions, etc.
2. Scroll down within the "**Terms**" clause. Click on the "**Actions button**" and then "**Substitute**" option to access the clause library.
3. Once in the library, use the radio buttons to choose either an alternate clause you wish to use and then click **OK**. Optionally, a comment may be entered as well.

Step 17 Draft the Main Agreement

1. Click the **Main Agreement** link to the right of the task title and select **Download Draft** to open the document in Microsoft Word. If you are prompted to update fields in the document, click **Yes**.
2. In order to keep track of any changes made to the document, make sure that '**Track Changes'** functionality is turned on in Microsoft Word. When it's on, the changes are red-lined. (Track Changes can be turned on from the Review tab in Microsoft Word.)
3. Make sure that you turn off **field codes** so you can see the supplier's name and address in the contract document.
   a. **Click File > Options > Advanced**
   b. Scroll to Show Document Content
   c. **Show Field codes instead of their Values should be UN-CHECKED**
   d. Field Shading should be set to Always. Click **OK** to return.

Note: Into the Word document from the Contract Workspace.

4. Modify the agreement: In the **Services** section, change the text of the first sentence by replacing "**shall**" with "**will**." Note how the document is redlined to reflect the changes.
5. Once you are done editing, save the document on your computer in a location where you can locate it easily. **Close** the document.

Step 18 Draft the Main Agreement

Document

W Main Agreement

Drag and drop file to replace

Status: Draft

Version: v1 (editing)

ID: Doc1719854107

Current Task

Internal Review for ...

Status: Not Started

Main Agreement

What do you want to do

Review uploaded document

Update with uploaded document

Discard uploaded document

Review Changes | Process All Changes | Reject All Changes

Review changes done to the document.

Changes 1 (5) | Previous | Next

Services

Provider will provide the services to The Company specified in mutually executed Statements of Work. Without The Company's prior written consent, Provider shall will not perform Services for The Company using any individual who has been previously employed by The Company as a full or part-time employee in the twenty-four months immediately preceding the date Provider begins to perform the Services. The parties agree that Provider is an independent contractor and, as such, Provider is not a partner, agent, employee or principal of The Company. Provider will not act for or in the place of The Company in The Company's relations with third parties. The Company is not responsible for withholding or deducting from the compensation of Provider's employees, agents and subcontractors, any sums for federal or state income taxes, social security, unemployment compensation, medical, dental, workers' compensation or disability insurance coverage, pension or retirement plans or the like. Provider specifically agrees to pay any and all federal and state taxes and other payments lawfully due in connection with the compensation received under this Agreement.

▼ Miscellaneous > Governing Law

W This Agreement shall be governed by, subject to, and construed in accordance with the internal laws of the State of California, excluding the conflict of law rules. The parties specifically exclude from application to this Agreement the United Nations Convention on Contracts for the International Sale of Goods. [this clause is only a sample, and should be replaced.].

Library | Actions ▼

ALT | Actions

1. Return to the Contract Workspace in SAP Ariba.
   a. Click on the Main Agreement and click **View Details**
   b. **Drag and drop** the document from the folder to the box in the system
   c. At the top of the page a message reads "*A new document has been uploaded: What do you want to do?*", Click on **What do you want to do**? And choose **Review uploaded document.**
   d. On the next page you can review the changes in CW.
   On the subsequent screen, click on **Process All Changes**, save this as a new version and enter a comment describing your change and click **Save**.
2. Click on the **Main Agreement** link and select **View Details**. Select **Nonstandard** for the Clause Type (drop down towards the top of the screen). You should see the clause that you manually edited.
3. Scroll down the list of clauses until you get to the section labeled **Governing Law**. Click the **ALT** icon. The system will take you to the Clause Library and display any clauses that serve as an alternate to the current clause. Select the alternate clause and click **OK**. Back in the **Outline View**, notice the clause type changed from **Template** to **Library**. Minimize your browser.

Step 19 Draft the Main Agreement

1. **AdHocClause.docx**. **Close** Microsoft Word.
2. Return to the **Outline View** of the **Main Agreement** in your browser and add your new clause:
   a. Click on the **Arbitration** section and select **Add Clause(s)**
   b. Click on the **Custom Clause** tab and drop the **AdHocClause** document you just created into the dashed boxed
   c. Click **OK**
3. Back in the **Outline View**, scroll to the **Arbitration** section and verify that your new clause has been added.
4. Click **Done** to return to the contract workspace.

Step 20 Review the Main Agreement

1. Go back to the Tasks tab and notice that the next task to be completed is **"Internal Review for Main Agreement"**. So, we need to send the current document for review to the team members.
2. Click on the task name, and then on **"View Task Details"**
3. Specify the due date for the **Review** and click on the **Review Flow** to see who'll be involved with the review. Click the "**Submit**" blue button.

1. As your user is responsible for Legal and Business Unit, you can click on **"Complete Review"** from the task name since it was already drafted. On the confirmation screen, just click "**OK**"
2. Now log out and log in as the Supervisor User; see '*Requirements 02'* for credentials. Go to the **"Contracts Dashboard"** and from the "**My tasks**" list, click on the "**Review for Main Agreement**" task. Or go to **Manage>My tasks** and find your review request.
3. Another way is to find the request with Contract Workspace Id.

Step 22 Draft and Review internally Agreement

Review Task   Exit

The document below has been submitted for review. To view documents, click the document link to open or download them. If you are a reviewer, you can complete this task by clicking the **Complete Review** button. If you are the owner of this   *More*

Demo User SH - Contract - Apr 24 / Negotiation and Review / Internal Review for Main Agreement .docx

TSK2387568250 Internal Review for Main Agreement .docx   Round 1: Awaiting Response(s) ⓘ

Main Agreement ∨   One or more reviewers might not have responded to this task. You may upload the documents updated by
                                             the reviewers or complete the task without modifying the documents:

                                                         New Round   ⓘ

                                                         Mark Complete   ⓘ

Properties   **Task History**   Review Flow

                                                                                              ▦ Threaded

Owner   Date

salvador.henriquez@sap.com ∨   04/27/2020 12:41 PM

Reviewed   **OK**   Cancel

Enter a comment **message** and, if necessary, set the **Access Control** for this comment. You can also add document attachments to support your comment. To add a document from an external source, click **Add Attachment**. To add a reference to a   *More*

Message: B I U ≣ ≣ — size — ▼   — font — ▼ A ⅍ 𝒶

           Reviewed

Access Control: [▼]   View Details   ⓘ

Document   🔍 Search more   Attach Revised Document

                                            [Seleccionar archivo] Ningún archivo seleccionado
Main Agreement   Or drop file here

Additional Attachments

                                            No items

Delete   Add attachment   Add from Project

                                                                              OK   Cancel

1. The Supervisor User can now Download Draft of the **Main Agreement** document and review it. You can do any change you'd like to the document, and once done, you can upload that changed version;
2. Back in the SAP Ariba site (you should still see the open Review task):
   a. Click the **Complete Review** button
   b. Input a message of your choice back to the contract owner
   c. **Drag and drop** the **Main Agreement** that you just edited into SAP Ariba (optional)
   d. Click OK
   e. Log out of SAP Ariba as Supervisor User.

Step 23 Draft and Review internally Agreement

1.	Now that every team member has completed the review, the task owner can finally take in consideration all the comments and can finally complete the task. Login again as your own user, navigate to the contract workspace and then to the **Tasks** tab. From there, click on the name of the task **"Internal Review for Main Agreement"**, and then **View details**.
2.	You can notice the status of the task which is now "**Awaiting Owner Actions**". 2 buttons are available: • **New Round**: Either another round of reviews if you decide to create a new version of the Main Agreement and go through revision again • **Mark complete**: if you have received enough information from the team members and your document is ready to be sent to the supplier for negotiation
3.	You can see in the **Task History** tab of the task all the documents and proposals from the team members that have reviewed the main agreement and sent counter-proposals. Click on the link "**Review changes**" to see what kind of changes are proposing your team members.
4.	After the document opens in SAP Ariba, review the changes using the **Next** and **Previous** buttons to navigate the changes. Click **Process All Changes**.
5.	On the subsequent screen, save as a new version and enter the comment "**Reviewer's Redlines**". Click **Save**.
6.	Mark the **Internal Review** task **complete**.

Step 24 Negotiate Agreement

Demo User SH - Contract - Apr 24
Contract Workspace (Procurement)

ID CW2220755
Tasks: Incomplete Tasks: 5

Overview	Documents	Tasks	Team	Message Board	History

Show: (Any Status) ⌄   Required/Optional ⌄   (Any Owner) ⌄

Demo User SH - Contract - Apr 24

Actions ▾

Name	Document	Owner	Status	Due Date
▶ ✓ **Initiation - Authoring** ⌄		Project Owner	Complete	
▼ �III➤ **Negotiation and Review** ⌄		Project Owner	In Progress	04/27/2020
✓ Internal Review for Main Agreement .docx * ⌄	Main Agreement ⌄	salvador.henriquez@sap.com	Reviewed	04/27/2020
🕒 Supplier Negotiation .docx * ⌄	Main Agreement ⌄	Project Owner	Not Started	
▶ ⇨ App Action		Project Owner	Not Started	
⇨ Ame **View Task Details**		Project Owner	Not Started	
Edit Task				* Indicates required task
Open Main Agreement				
Mark Complete				

Negotiation Task

This task requires the negotiation of document(s). Prior to submitting this task, documents must be ready for negotiation. You can enter

Demo User SH - Contract - Apr 24 / Negotiation and Review / **Supplier Negotiation .docx**

TSK2385727057 Supplier Negotiation .docx

1. W Main Agreement ⌄

2. Select Reviewers
   [Lansoft technologies   ⌄]   Add more   New External Reviewer

   Approval Rule Flow Type: ● Parallel
                              ○ Serial
                              ○ Custom

3. Specify Due Date
   ○ Days after parent phase starts: None   ⓘ
   ● Fixed Date: 04/27/2020   📅

4. Provide an initial message and click Submit

   [B I U ≡ ≡ — size — — font — A ᴬ ⊘]
   Please supplier review this contract

   Additional Attachments...

5. [Submit]

1. Click on the **"Supplier Negotiations"** task, and select the option **"View Task Details"**
2. In order to launch the negotiation, it is necessary to indicate a reviewer to the task. You can select from the supplier users already in the system or invite a new external reviewer by clicking the associated link. (optional)
3. If the contract is for "**LanSoft**.", then click on the dropdown, and then "**Search more**…", search for "**LanSoft",** and select the user with ID users@lansoft.com. For Supplier Negotiation task, select the supplier user 'Lansoft Technologies' with 'standardaccntgmail.com'. Use the below one:
4. After selecting the supplier user we have to negotiate the contract with, you can select a review date, and also you need to indicate an initial message as it is mandatory.
5. Click on the blue button "**Submit**". Once you're back to the project tasks tab, you can log out; or open a new browser as you're going to review the document as the supplier in the next step.

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Step 25 Negotiate Agreement
1. Go to the following URL: http://supplier.ariba.com. Enter the system using the supplier credentials (if you're using "LanSoft", then use users@lansoft.com - see all credentials on '*Requirements 02'* section) and then "**login**". 2. From the supplier view, click on the tiles icon, and select "**Contracts**"; then make sure, you're viewing content for customer **"CUMULONIMBUS – TEST"** and wait for the main content of the page to be loaded.

Step 26 Negotiate Agreement

Negotiation Task

Exit

This task has been submitted for negotiation and is now in progress. You can add comments on the **Task History** tab. Notification of new comments is controlled in the **Advanced Task Details** area. Additional task instructions *More*

Demo User SH - Contract - Apr 24 / **Supplier Negotiation .docx**

TSK2385727057 Supplier Negotiation .docx

Round 1: Awaiting Response(s)

salvador.henriquez@sap.com
Please supplier review this contract
Main Agreement ∨

One or more documents have been submitted for your review. You have the following options:

- View the documents on the left.
- To propose document changes, edit and save all required documents locally. Add it as an attachment when you submit your Counter Proposal or Review.

Create Counter Proposal

Accept Proposal

Properties | **Task History**

Ariba Contract Management

Company Settings ▼ Lansoft technologies **Help Center**

Go back to Cumulonimbus - TEST Dashboard

Desktop File Sync

Counter Proposal

OK | Cancel

Enter a comment **message** and, if necessary, set the **Access Control** for this comment. You can also add document attachments to support your comment. To add a document from an external source, click **Add Attachment**. To add *More*

Message:

B I U ≣ ≣ — size — ∨ Verdana ∨ A A ⬯

Please review my feedback in the main agreement.

Access Control: (no value) ∨

Document	Attach Revised Document
Main Agreement	Main Agreement.docx Delete Attachment

Attach Revised Document

Examinar...

Or drop file here

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1. In the list of tasks presented in the summary table, locate your project, and click on the task call "**Supplier Negotiation**"
2. Supplier can download the document to review it; open it and see how the document is clean from internal comments. Then the system gives two options to the supplier:
   • **Create counter proposal**: in this case, the supplier is invited to load a new version of the main agreement and send it to the buyer. Click "**OK**" on the confirmation screen. (select this one)
   • **Accept Proposal**: accept formally the proposal from the customer. For this demo, just click on the "Accept Proposal" button to move to the signature part of the process.

Step 27 Negotiate Agreement

Demo User SH - Contract - Apr 24

Contract Workspace (Procurement)

ID CW2220755

Tasks: Incomplete Tasks: 4

| Overview | Documents | Tasks | Team | Message Board | History |

Show: (Any Status) ▾   Required/Optional ▾   (Any Owner) ▾

Demo User SH - Contract - Apr 24

Actions ▾

Name	Document	Owner	Status	Due Date
▶ ✓ Initiation - Authoring ⌄		Project Owner	Complete	
▼ ⇢ Negotiation and Review ⌄		Project Owner	In Progress	04/27/2020
✓ Internal Review for Main Agreement .docx * ⌄	Main Agreement ⌄	salvador.henriquez@sap.com	Reviewed	04/27/2020
📄 Supplier Negotiation .docx * ⌄	Main Agreement ⌄	salvador.henriquez@sap.com	In Progress	04/27/2020
▶ ⇢ App...	Action	Project Owner	Not Started	
⇢ Am...	**View Task Details**	Project Owner	Not Started	
	Edit Task			
	Open Main Agreement			* Indicates required task

Negotiation Task

Exit

This task has been submitted for negotiation and is now in progress. You can add comments on the **Task History** tab. Notification of new comments is controlled in the **Advanced Task Details** area.   *More*

Demo User SH - Contract - Apr 24 / Negotiation and Review / **Supplier Negotiation .docx**

TSK2385727057 Supplier Negotiation .docx

Round 1: Awaiting Owner Action ⓘ

📄 Main Agreement ⌄

Lansoft technologies *Counter Proposal*
Please review my feedback in the main agreement.

The reviewer has already responded. You have the following options:

- Review comments on the **Task History**

- Review and merge document changes sent back from the reviewer. Clicking the document icon lets you see the document attached by the reviewer and clicking the **Review Change** link allows you to merge those changes into the server version of the document. If this link is not visible for a document, then you must merge the changes manually.

📄 Main Agreement.docx **(Review Change)**

New Round ⓘ

Mark Complete ⓘ

Review Changes

Process All Changes | Reject All Changes

Review changes done to the document.

Changes 1 (6)   Previous | Next

Services Agreement

~~L~~Lansoft Technologiest with its principal place of business located at , , , (hereinafter referred to as "Provider"), and The Company ~~Cumulonimbus - TEST~~ hereby enter into the following agreement (hereinafter referred to as "Agreement"), intending to be bound thereby under all appropriate laws.

Term

~~Either party may terminate this Agreement, with or without cause, by written notice to the other party. In the event of such termination, Provider shall be paid for time actually worked or deliverables actually accepted as set forth in the Statement of Work that meet the specifications set forth therein.~~
by the supplier...

Lansoft Technologiesit with its principal place of business located at , , , (hereinafter referred to as "Provider"), and The CompanyCumulonimbus - TEST hereby enter into the following agreement (hereinafter referred to as "Agreement"), intending to be bound thereby under all appropriate laws. XXXYYYZZZ

Confidential Information

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Review Changes

Save | Cancel

Please review your changes. You may enter comments on each changed **clause**. If you check in these changes as a new Document version you may also enter an overview comment for the entire set *More*

Save these changes as a new version? ● Yes, save as v3 ○ No, save and continue editing v2

Version Comment: [   ]

Negotiation Task

Exit

This task has been submitted for negotiation and is now in progress. You can add comments on the **Task History** tab. Notification of new comments is controlled in the **Advanced Task Details** area. *More*

Demo User SH - Contract - Apr 24 / Negotiation and Review / Supplier Negotiation .docx

TSK2385727057 Supplier Negotiation .docx   Round 1: Awaiting Owner Action ⓘ

[W] Main Agreement ∨

Lansoft technologies *Counter Proposal*
Please review my feedback in the main agreement.

The reviewer has already responded. You have the following options:

• Review comments on the **Task History**

• Review and merge document changes sent back from the reviewer. Clicking the document icon lets you see the document attached by the reviewer and clicking the **Review Change** link allows you to merge those changes into the server version of the document. If this link is not visible for a document, then you must merge the changes manually.

[W] Main Agreement.docx (Review Change)

New Round ⓘ

Mark Complete ⓘ

Completed

OK | Cancel
OK button

Enter a comment **message** and, if necessary, set the **Access Control** for this comment. You can also add document attachments to support your comment. To add a document from an external source, *More*

Message: | B I U ≣ ≡ — size — ▼ — font — ▼ A ✎ 📎 |
          | Completed |

Access Control: [∨] View Details ⓘ

---

1. Go back to the Ariba Contracts platform and log in with your user. From the dashboard, enter the contract workspace. Click on the **Supplier Negotiations** task, and "**View Task Details**"
2. Go to the MainAgreement document and select **Review Change**
3. Here you can see all changes and feedbacks then select **Process All Changes**
4. **Save** as a new version
5. You can see the answer from the supplier – in this case he create a **counter proposal**– so you can now "**Mark Complete**" this negotiation task.
6. Complete to save all changes

Demo User SH - Contract - Apr 24

Contract Workspace (Procurement)

ID CW2220755
Tasks: Incomplete Tasks: 3

| Overview | Documents | Tasks | Team | Message Board | History |

Show: (Any Status) ▼   Required/Optional ▼   (Any Owner) ▼

Demo User SH - Contract - Apr 24

Actions ▼

Name	Document	Owner	Status	Due Date
▶ ✓ Initiation - Authoring ∨		Project Owner	Complete	
▼ ✓ Negotiation and Review ∨		Project Owner	Complete	04/27/2020
✓ Internal Review for Main Agreement .docx * ∨	Main Agreement (v2/3) ∨	salvador.henriquez@sap.com	Reviewed	04/27/2020
✓ Supplier Negotiation .docx * ∨	Main Agreement (v2/3) ∨	salvador.henriquez@sap.com	Complete	04/27/2020
▼ ⇨ Approve and Finalize ∨		Project Owner	Not Started	
🕐 Approval for Contract Documents * ∨	Contract Documents ∨	Project Owner	Not Started	
🕐 [Action] ...ocx * ∨	Main Agreement ∨	Legal	Not Started	
🕐 [View Task Details]		Project Owner	Not Started	
⇨ Ame [Edit Task]		Project Owner	Not Started	
[Open Folder]				

*Indicates required task

Demo User SH - Contract - Apr 24 / Approve and Finalize / **Approval for Contract Documents**

TSK2385727061 Approval for Contract Documents

1. ▶ ☐ Contract Documents (Read Only)

2. Specify Due Date

   04/27/2020 📅 ⓘ

3. Provide an initial message and click Submit

   | 🖼 B I U ≡ ≡ | — size — ▼ | — font — ▼ A 🔧 ⌀ |

   Please review the final version

   Additional Attachments...

4. **Submit**

| Properties | Task History | **Approval Flow** |

Submitted ▼ | Pending / Category Manager ▼ | Approved

---

1. Now, the phase "**Negotiation and Review**" is finished, we enter the Approve and Finalize phase. The first task is the internal approval of this contract.
2. Click on the tasks tab, click on the task "**Approval for Contract Documents**" and then "**View Task Details**".

3. You'll be able to submit the document for approval. You can have a look at the approval flow from the bottom of the screen. Indicate a due date, a comment if necessary, and then click on the "**Submit**" button.
4. Logout with your user.

Step 29 Approval and Final contract generation

Approval Task

Demo User SH - Contract - Apr 24 / Approve and Finalize / **Approval for Contract Documents**

TSK2385727061 Approval for Contract Documents   Round 1: Awaiting Response(s)

salvador.henriquez@sap.com
Please review the final version

📁 Contract Documents (Read Only)

W Main Agreement ⌄

One or more documents have been submitted for your review. You have the following options:

- View the documents on the left.

- To propose document changes, edit and save all required documents locally. Add it as an attachment when you submit your Counter Proposal or Review.

Deny

Approve

Properties   Task History   **Approval Flow**

Submitted → Active / Category Manager → Approved

	Approval Task table
1.	Log in as the approver; user **"Supervisor User"** – for credentials please refer to "*Requirements 02***".** From the Contracts tab, access the My tasks list, and you should see the waiting tasks to be approved. If you don't see your task, click on the link "**View all**" to search through all the tasks. Or you can search it with Contract workspace ID.
2.	In an approval task, the approver has 2 options: • **Deny**: if the approver doesn't agree with the document, he can deny the task, and send it back to the owner of the contract for review. • **Approve**: if the approver is OK with this agreement, he can approve it; the task being approved will change the status of the whole workspace and mark as it "**Approved**"

Click on the "**Approve**" button, and then "**OK**" in the confirmation screen. Once back at the dashboard, log out, and log in again as your user so that the contract can be signed.

Note: At this stage you can use DocuSign.

Step 30 Electronic Signature using DocuSign®

Demo User SH - Contract - Apr 24

Contract Workspace (Procurement)

ID CW2220755
Tasks: Incomplete Tasks: 2

| Overview | Documents | Tasks | Team | Message Board |

Show: (Any Status) | Required/Optional ▾ | (Any Owner) ▾

Demo User SH - Contract - Apr 24

Actions ▾

Name		Owner	Status	Due Date
▶ ✓ Initiation - Authoring ∨		Project Owner	Complete	
▶ ✓ Negotiation and Review ∨		Project Owner	Complete	04/27/2020
▼ ⊪▸ Approve and Finalize ∨		Project Owner	In Progress	04/27/2020
✓ Approval for Contract Docume	✓	salvador.henriquez@sap.com	Approved	04/27/2020
🕐 Signature for Final Contract.docx ∨	Main Agreement ∨	Legal	Not Started	
🕐 Finalize and Publish * ∨		Project Owner	Not Started	
⇨ Amendment process ∨		Project Owner	Not Started	

Indicates required task

Select a signature provider

- ⦿ DocuSign ⓘ
- ○ Paper Signature ⓘ

OK

Cancel

Signature Task

This task requires the document to be signed. Click on **Submit** to activate the signature process.

Demo User SH - Contract - Apr 24 / Approve and Finalize / **Signature for Final Contract.docx**

TSK2385727060 Signature for Final Contract.docx

1. 📄 Main Agreement ∨

2. Select Signers

By entering a Signer name and/or email address here, you acknowledge that you have the authority to allow transfer of this personal data to systems operated by Ariba and also to systems by the electronic signature provider selected by you and enabled for your account, and you consent to such transfer and related storage. These systems may be located in a country where you or the Signer are located. The signer names are submitted to the signature provider in the order shown. You can drag and drop signer names to change the order.

	Name	Email	Type
☐			
	No items		

Add Signer ▾ | **New Email Signer**

3. Specify Due Date

○ Days after parent phase starts: None ⓘ

⦿ Fixed Date: 04/27/2020 📅

Create Business Contact

OK | Cancel

This **Business Contact** is not granted access to Ariba, but will be able to provide input for a review or negotiation task, or to receive email for a notification task. To add a Business Contact, enter a *More*

Business Contact Information:

Name: *	Salvador Henriquez
Email Address: *	salvahenriquez@gmail.com
Title: *	Director
Phone Number:	
Fax:	
Street:	
City:	
State/Province/Region:	
Postal Code:	
Country:	(no value)

3. Specify Due Date

○ Days after parent phase starts: None ⓘ

● Fixed Date: 04/27/2020

4. Provide an initial message and click Submit

[rich text editor toolbar: B I U — size — — font — A]

Additional Attachments... ⓘ

5. Choose a destination folder

Signed documents are stored in this location.

| ○ | ▼ ☑ Demo User SH - Contract - Apr 24 | salvador.henriquez@sap.com |
| ● | ▼ ☐ Contract Documents | Project Owner |
| ○ | ▶ ☐ Reference Documents | Project Owner |

6. Submit

Log out from the application, and log in again using the user "**DemoCFO**". Go to the "**Contracts**" tab of the dashboard, and search for your Contract.

1. From the search results, open the Contract Workspace. In the Tasks tab, you can see that the approval task is now complete, and the Signature task has, as owner, the group Legal for which DemoCFO is the main user. You need to be the owner -of this task to send the document for signature. Click on the task, called "**Signature for Final Contract**", and then "**View Task Details".**
2. A Popup will appear so that you can select which Digital Signature provider to use: Select the "**Docusign**" option and then OK.
3. In the customer organizations, this task will be set-up so that a few numbers of persons can actually sign the contract – we've left it open for demo purposes. Click on "**New Email Signer**" and create a new email signer; use an email address that you can access.

4. The system will ask for data in order to provide **DocuSign** with information regarding the email signer. Mandatory is the **Name** and **Email**. Please fill-in the mandatory fields, and click "**OK**" 5. Note at the bottom of the screen where the signed document will be stored. Indicate a due date, and then click on "**Submit**" to send this document to signature

Step 31 Electronic Signature using DocuSign®
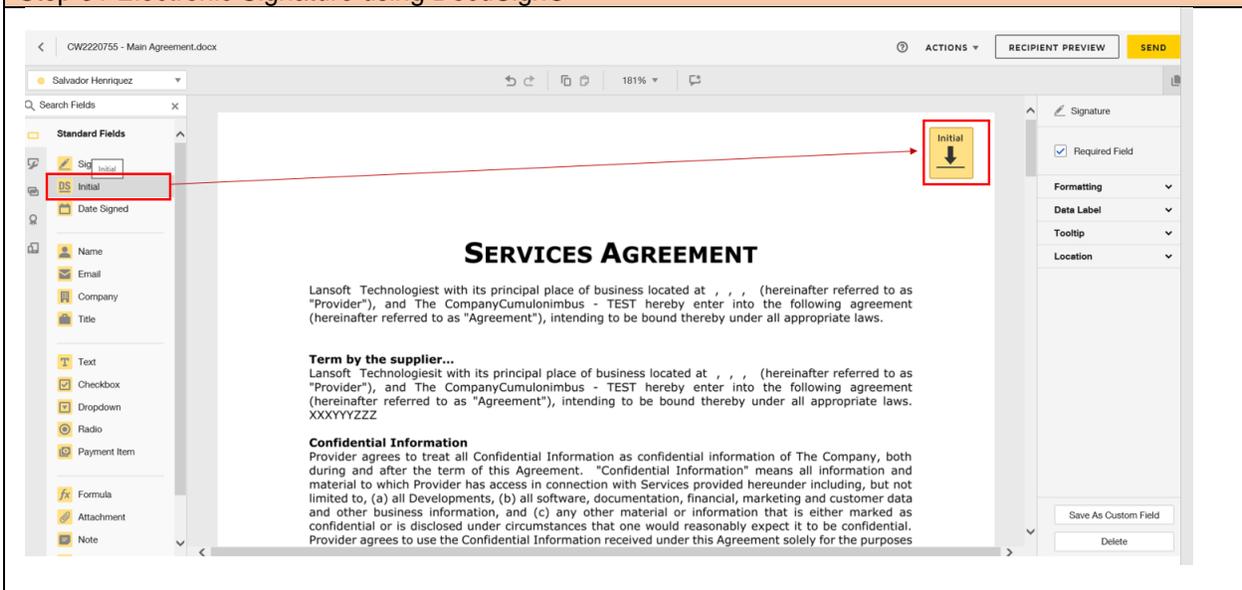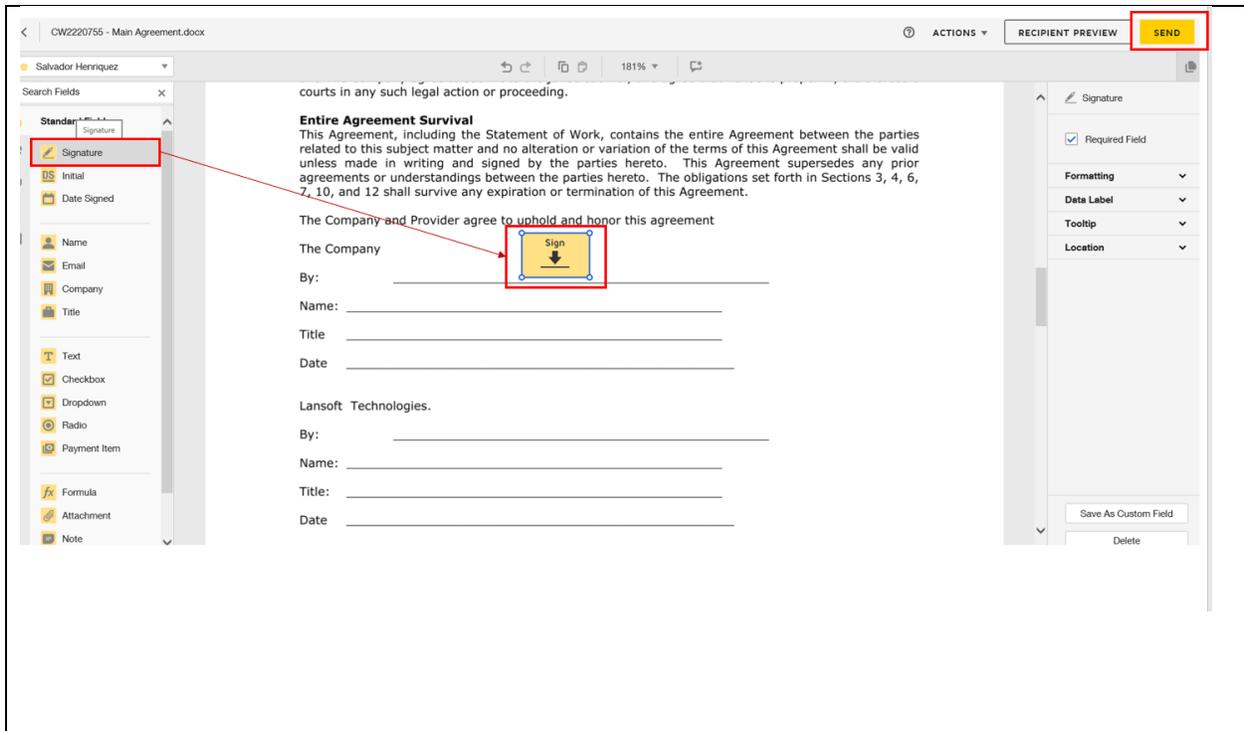
1. The system will direct you to the **DocuSign** web site where you'll be able to visualize the **PDF** version of the contract and where you'll be able to specify what kind of signatures or fields you want to have in the document and that the signer will have to fill.
2. To do a simple demo, drag and drop an "**Initial**" box on the first page, and a <u>Signature</u> on the last page of the contract.
3. Finally, "**Send**" the document to the signer.

Step 32 Electronic Signature using DocuSign®

1. Open the email Inbox you've specified when creating an external email reviewer- you should have received an email that looks like the following.
2. Click on "**Review Document**". This will take you again to the DocuSign site. Click on the "**continue**" button.
3. There DocuSign will guide you in the signing process of the document. Just use the orange buttons, like the Start one.
4. Add your initials to your profile and to the document, and then sign the last page of the document.
5. When all done, just click the "**Finish**" button.
6. You will receive the final version on your email inbox.

Step 33 Electronic Signature using DocuSign®

1. Let's go back to the Ariba Contracts Application as the user "DemoCFO". From the "Recently Viewed" box, click on the contract you just signed.
2. Click on the "**Signature" task"**, and then "**View Details**".
3. This time select the "**Properties**" tab of the task. An "**Actions**" button is available, click on it, and then on "**Refresh Status**".
4. The page will refresh, and you'll see that the status of the task is now "**Signed**", and that the document is being downloaded
5. Click on the "**Exit**" button, and then log out from the user "DemoCFO" in order to log in again using your own user.

Demo User SH - Contract - Apr 24
Contract Workspace (Procurement)

ID CW2220755
Tasks: Incomplete Tasks: 1

| Overview | Documents | Tasks | Team | Message Board | History |

Show: (Any Status) ▾ Required/Optional ▾ (Any Owner) ▾

Demo User SH - Contract - Apr 24

Actions ▾

Name	Document	Owner	Status	Due Date
▶ ✓ **Initiation - Authoring** ▾		Project Owner	Complete	
▶ ✓ **Negotiation and Review** ▾		Project Owner	Complete	04/27/2020
▼ ‖◆ **Approve and Finalize** ▾		Project Owner	In Progress	04/27/2020
✓ Approval for Contract Documents * ▾	Contract Documents (v1/1) ▾	salvador.henriquez@sap.com	Approved	04/27/2020
✓ Signature for Final Contract.docx * ▾	Main Agreement ▾	CFO Demo User(Ariba-SAP)	Signed	04/27/2020
🕐 Finalize and Publish * ▾		Project Owner	Not Started	
⇨ Ame...		Project Owner	Not Started	

Action

View Task Details

Edit Task

Mark Started

Mark Complete

Associate Document

Indicates required task

Demo User SH - Contract - Apr 24
Contract Workspace (Procurement)

ID CW2220755
Tasks: Incomplete Tasks: 0

| Overview | Documents | Tasks | Team | Message Board | History |

Overview   Actions ▾

Contract ID: CW2220755
Contract Status: Draft
Version: Original
Owner: salvador.henriquez@sap.com ⓘ
Test Project: No ⓘ
Base Language: English
Access Control: (no value) ⓘ
Description: ⓘ
    I would like to contract ...

Parent Project:
Demo User SH - Agreement Request - Apr 23

Contract Attributes   Actions ⌄

Related ID:
Last Published: (no value) ⓘ
Hierarchical Type: Stand-alone Agreement
Proposed Contract Amount: $500,000 USD
Contract Amount:

Process   All Tasks

✓ Initiation - Authoring ▾   4/24/2020
✓ Negotiation and Review ▾   4/27/2020
✓ Approve and Finalize ▾   4/27/2020
⇨ Amendment process ▾

Quick Links   All Documents

A Quick Link is a path to an important document in this project. To add a Quick Link to this area, navigate to the document you want to link to and choose **Add to Quick Links** from its menu.

Announcements   New   Details

Welcome to the project!   4/24/2020
                                 salvador.henriquez@sap.com

Edit Attributes
View Attributes
Publish
Amend
Put On Hold

1. The last task in the workspace is to "**Finalize and Publish** – so click on the task and mark as "**Complete**"
2. Go back to the **Overview** tab on the Contract Workspace, and in the **Contract Attributes** section, click on the **Actions** button. Then click **Publish**.
This will change the status of the contract to "**Published**", and therefore the contract is open for its execution.

Review Amendment Types

Step 35 Review Amendment Types
1. Your Contract Workspace is now published. Once a contract is open and in execution, it cannot be changed easily, as any change would need to be communicated to all parties that have signed the contract. Only option is to create amendments. 2. In **Contract Attributes** section, click on the **Amend** option to view the amendment types. 3. Also note that other options are available: - **Put On Hold**: in order to suspend an active contract. - **Close**: in order to close a contract before its expiration.

Step 36 Review Amendment Types

Amend Contract Demo User SH - Contract - Apr 24   [OK] [Cancel]

The **Amendment Type** indicates the reason for amending this contract. There are five types of amendments: **Renewal, Amendment, Administrative, Price Update** and **Termination. Renewal** *More*

Amendment Type: [Renewal ˅]

Amendment Reason Comment: *

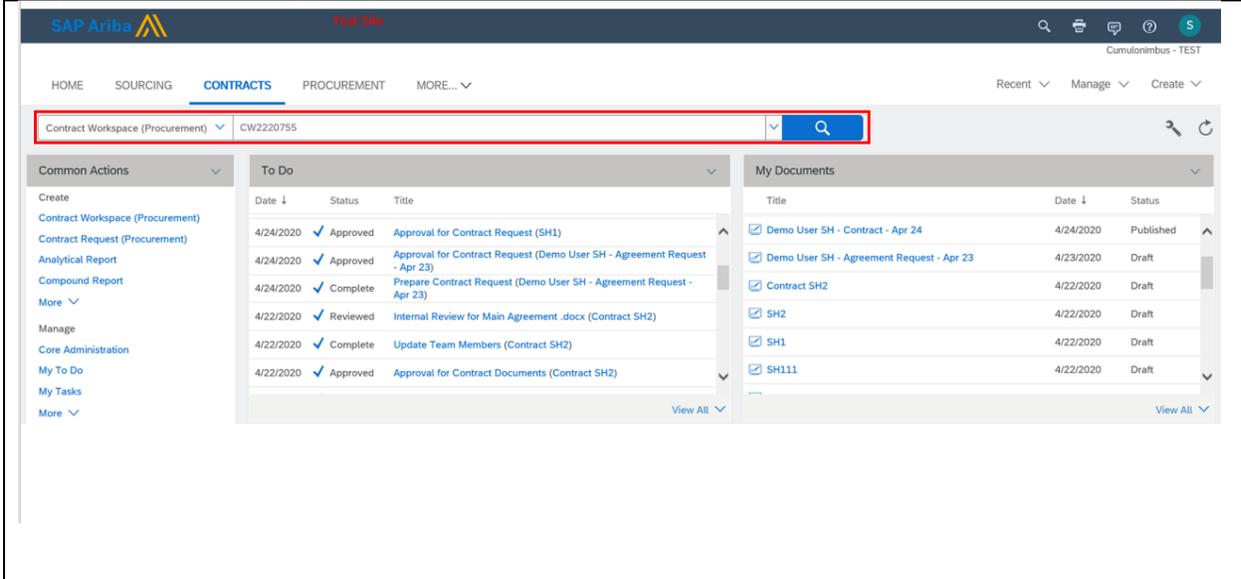Renewal
Amendment
Administrative
Termination

[OK] [Cancel]

1. The solution offers four Amendment Types:
   -**Renewal**: Allows you to change the effective date, expiration date, and reminder settings.
   - **Amendment**: Allows you to change any part of the contract workspace. If you change a document associated with a task which has **Repeat** for **Each Draft** selected, Contract Management reactivates the task.
   - **Administrative**: Allows you to change non-contract details, such as adding a team member or uploading a supplemental document or changing a description field. This type of change does not create a new version of the contract workspace. The Published status is kept.
   - **Termination**: Allows you to change the expiration date and reminder settings. Use this amendment type to close a contract before its expiration date due to an adverse condition or disagreement.
   Note: Depending on your Contract Management implementation, you might have additional fields for each amendment type.
2. After review, click **Cancel** to exit out of Amend Contract Workspace option.
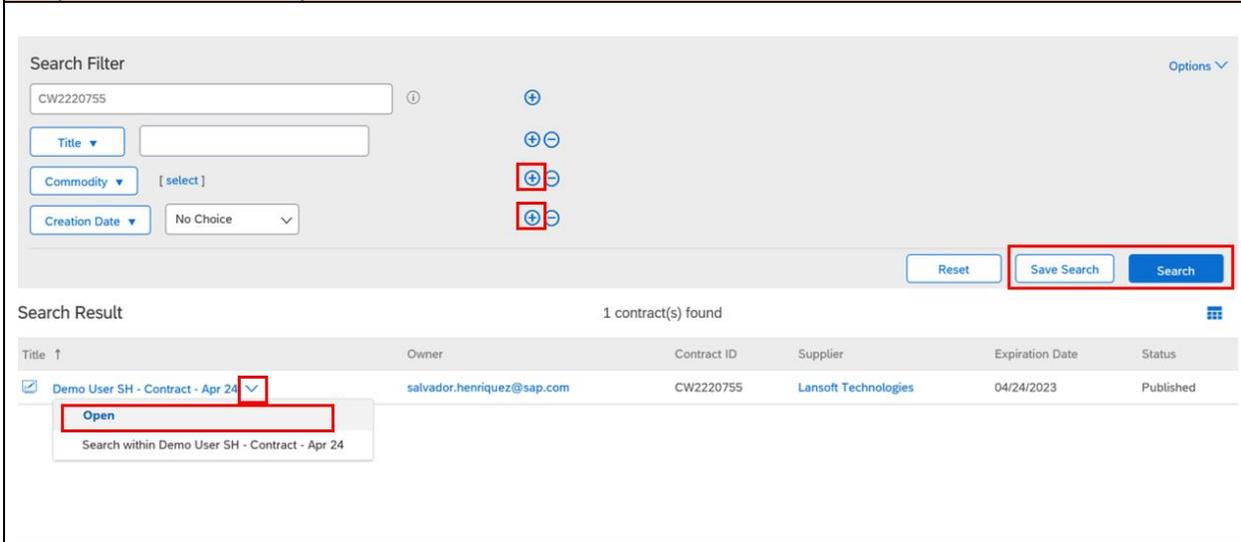
Contract Workspace Search

Step 37 Contract Workspace Search
1. From the **Contracts** tab, you have access to the search tool –Make sure that the type of document you're searching is "**Contract Workspace (Procurement**)".If it isn't, click on the drop-down menu and select it. Once it's selected, you can type any text you want to search within your contract workspaces. The system will look for a match in all metadata fields of the Contract (title, id, etc..) but also will run a **full text search** within the contracts documents.

Step 38 Contract Workspace Search
1. Using the keywords you've entered, the system takes you to the search screen with the first results of your search. 2. You can now refine your search by adding new filters (Title, Commodity, etc..) 3. You can **save** your searches for future uses. 4. From the results table, you can add or remove some result columns if necessary. 5. Click the **Home** tab to return to the **Dashboard**.

Clause Search

Step 39 Clause Search
1. To search clauses, the process is very similar to the **Contract** search. From the **Contracts** tab, go to the search tool, click on the drop-down menu and select "**Clause Library**". Then a type a text from a clause, and finally on the "**search**" icon. 2. In the results page, you can click on the title of any the clause found, and then click on the "**Search Where Used**" link for the system do display all the contracts where this clause is being/has been used.

Step 40 Clause Search

Search Filter

Options ∨

Search using Title, ID, or any other term   ⓘ   ⊕

| Library Clause ▼ | Clause General1.docx ∨ | ⊕⊖ |
| Project: Type ▼ | All ∨ | ⊕⊖ |

Reset   Save Search   **Search**

Search Result   2 document(s) found   ▦

Section	Title ↑	Location	Project	Clause Type	Summary
(no value)	W̲ Договор Инфраструктура ∨	/Contract Documents/Договор Инфраструктура_Folder/	Тест Контракт_2603_3 ∨	Preferred Clause	
Services	W̲ Main Agreement ∨	/Contract Documents/Main Agreement_Folder/Services/	Договор закупки компьютерной техники №2 ∨	Preferred Clause	

The contracts with the searched clause are now displayed.