

Contracts

Quick Reference Guide – Power User – CPO

Contract Creation Process



• These are the steps a contract follows at the AAMC. Suppliers are involved at the circled times



Reviewing a Contract – Supplier



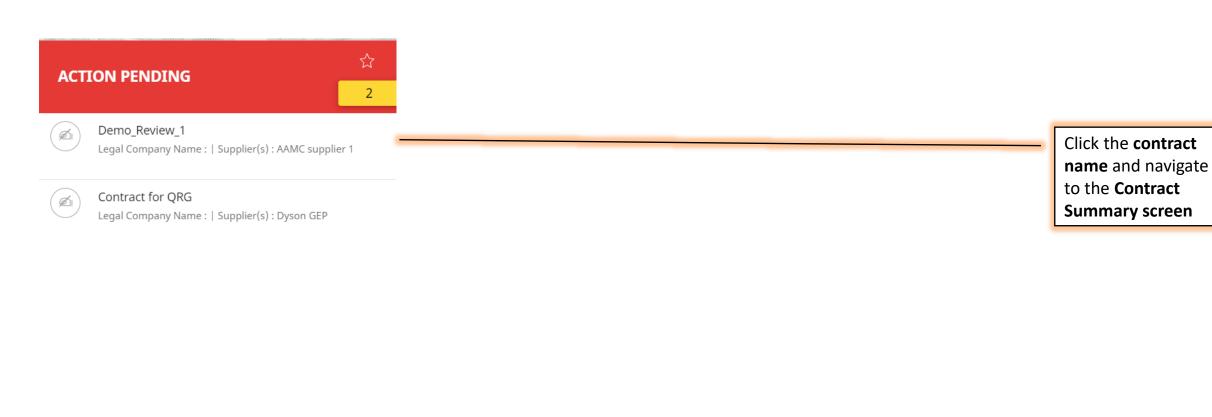
- There are three ways in which a team member can review a contract:
 - Offline: Involves downloading the contract language document and making changes to it and upload a minor version back into the system
 - Online: Involves making changes to the contract language online
 - Using Word Plugin: Involves making changes to the contract language in word and updating it in the system using the plugin
- To review a contract, please follow the following steps:



Click on **Tasks**, to access the **Action Pending** Card



To review a contract, you will receive a task and email. To continue, please follow the steps:



SHOW ALL



- Contract Language elaborates the terms and conditions of the agreement
- It also defines the roles and responsibilities of each party that is part of the contract
- Clauses can be added to Contract Language
- During the review process, redlining of the contract also takes place in Contract Language
- In the end of Contract Authoring process, Both the parties (Internal / External) would need to sign the Contract Language
- The Contract Language section also imports values directly from the Contract Meta data fields into the Contract Body, using the 'Variables' functionality. For example, Contract Sponsor, Supplier Legal Name, Contract Effective Date etc.



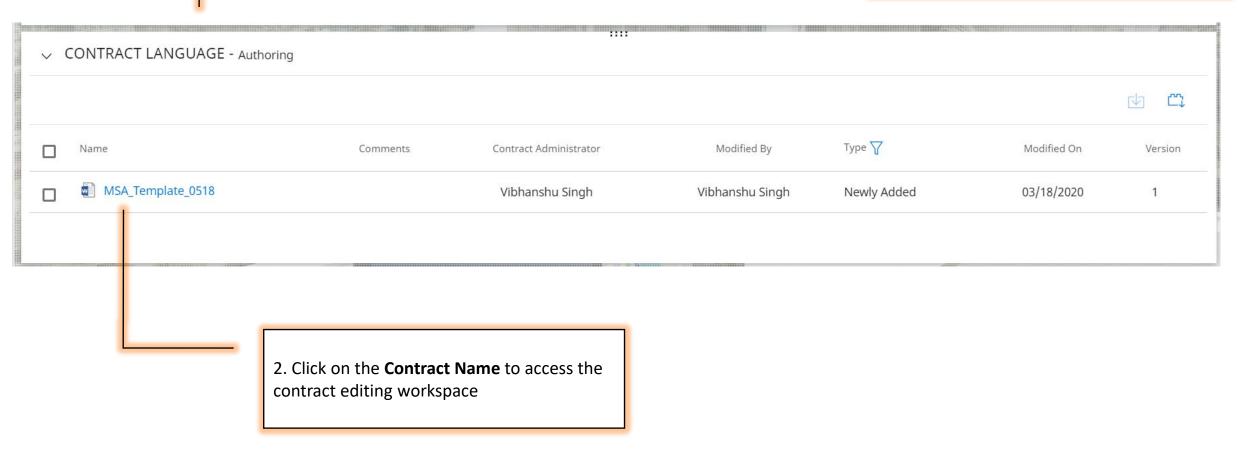
• Contract summary screen: Here you can review contracts details like information, suppliers, contract body and line items





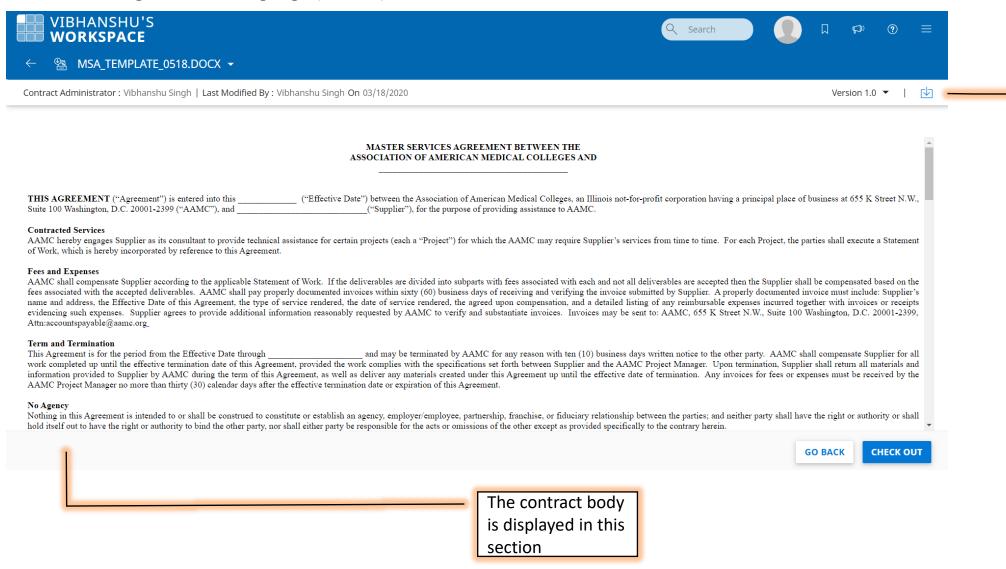
Reviewing Contract Language (Offline)

1. To review contract language offline, first click on the **contract language section**



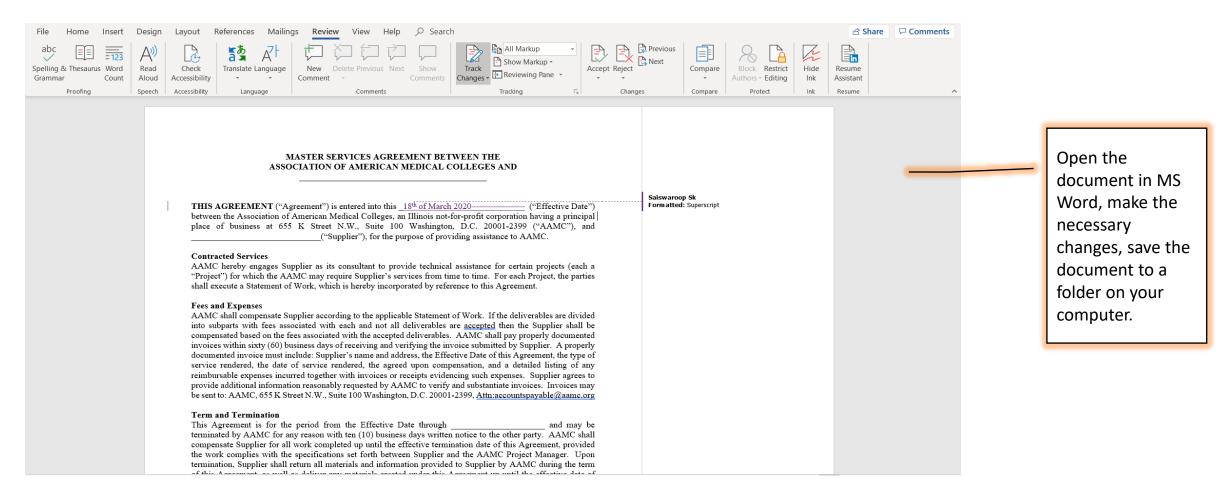


Reviewing Contract Language (Offline)



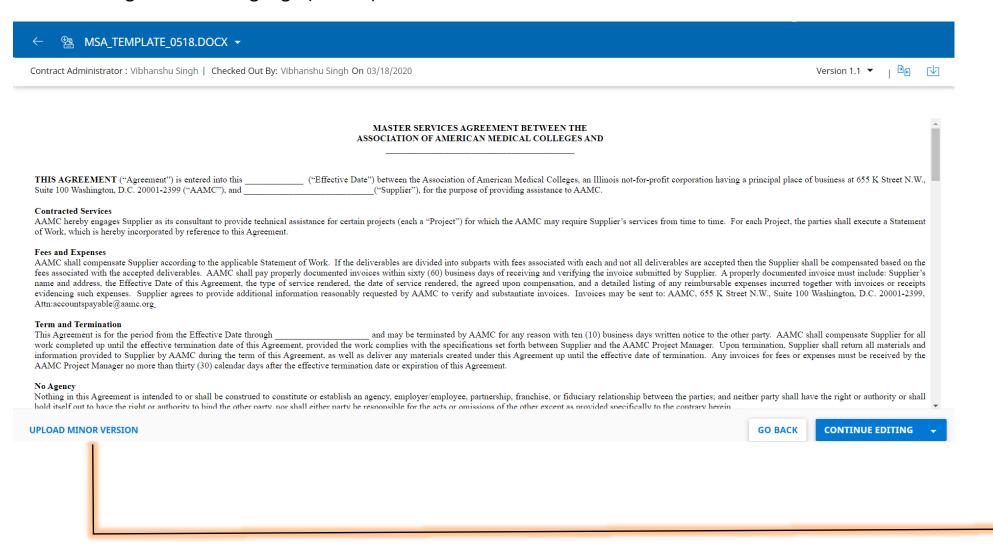
1. Click on
Checkout and
then click on this
button to
Download the
current version of
contract language
for editing





Note: You can enable Track Changes in MS Word, however SMART will highlight any changes made to the contract compared to it's previous versions.





To upload the updated contract language click on **Upload Minor Version**





Attachments

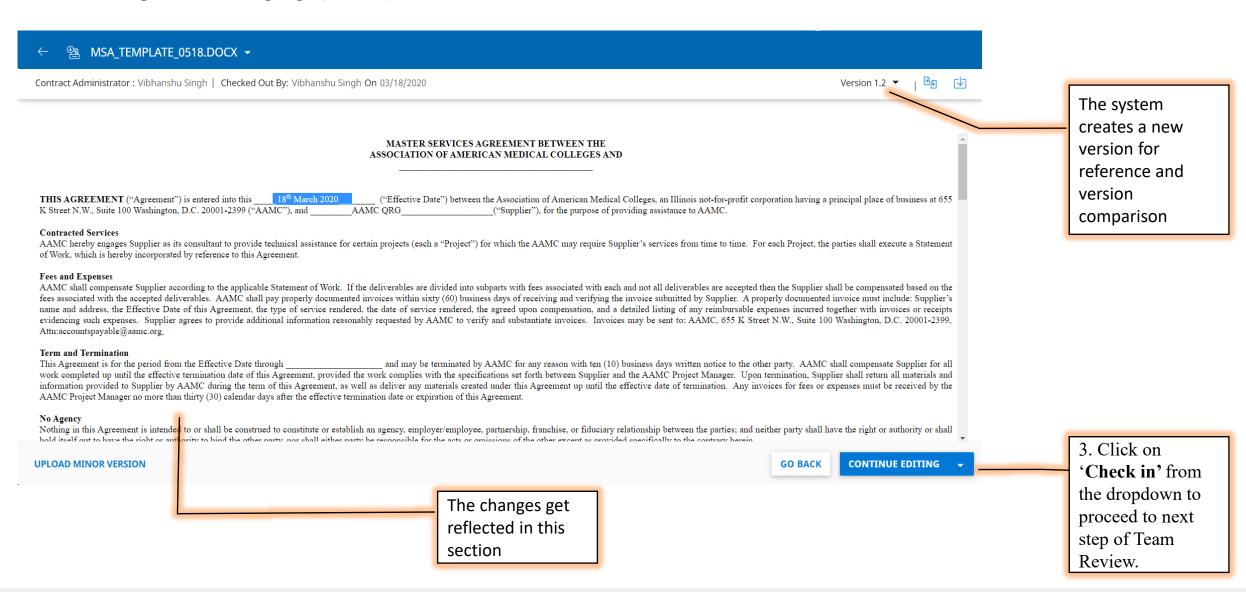
Drag and drop file here OR UPLOAD DOCUMENTS -

Supported file formats: .doc,.docx.
Limited to file(s) of 10MB each.
Maximum 1 files can be uploaded at a time.

Browse for your file using the Upload Documents
Button and upload it

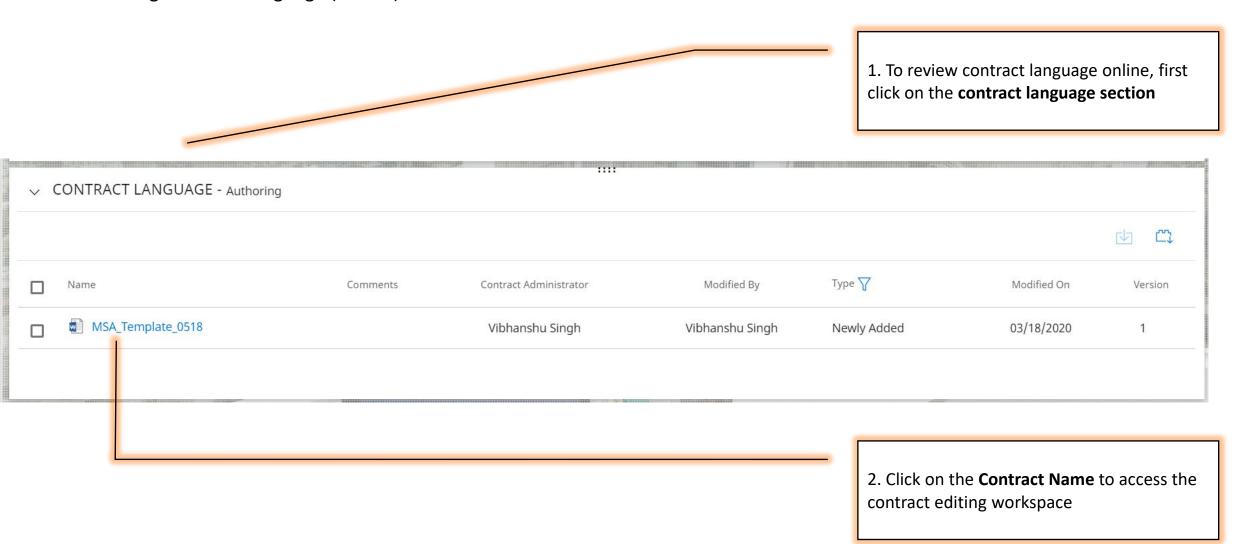
CLOSE



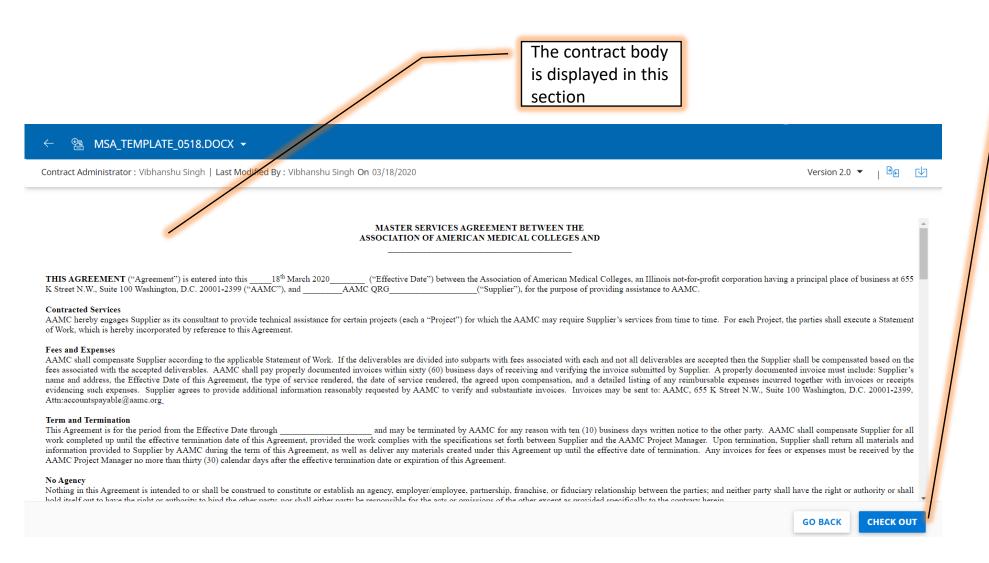




Reviewing Contract Language (Online)



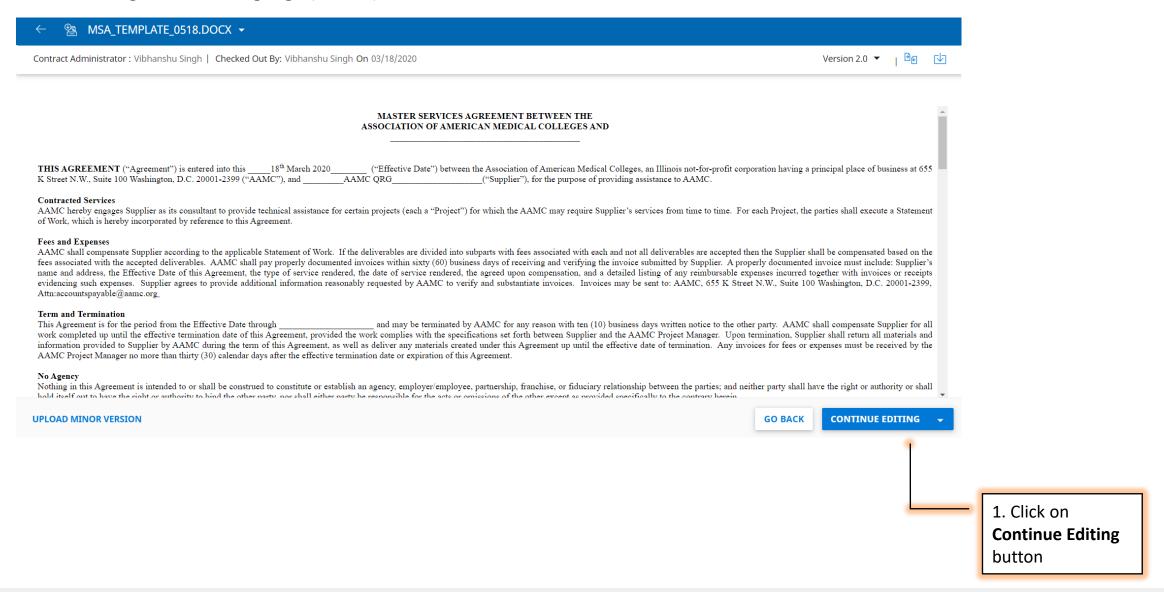




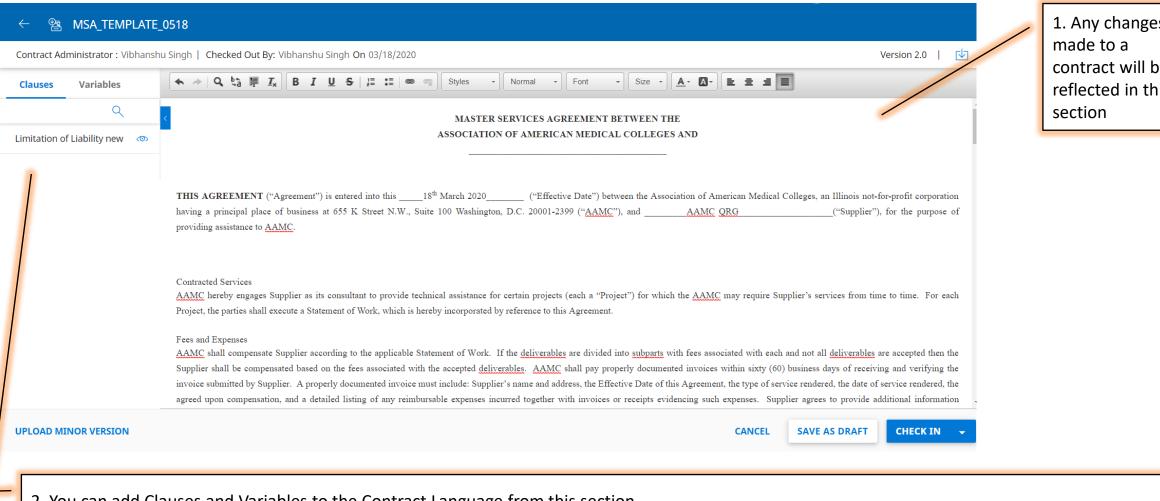
Unified Source-to-Pay Platform

1. Click on **Check Out** button





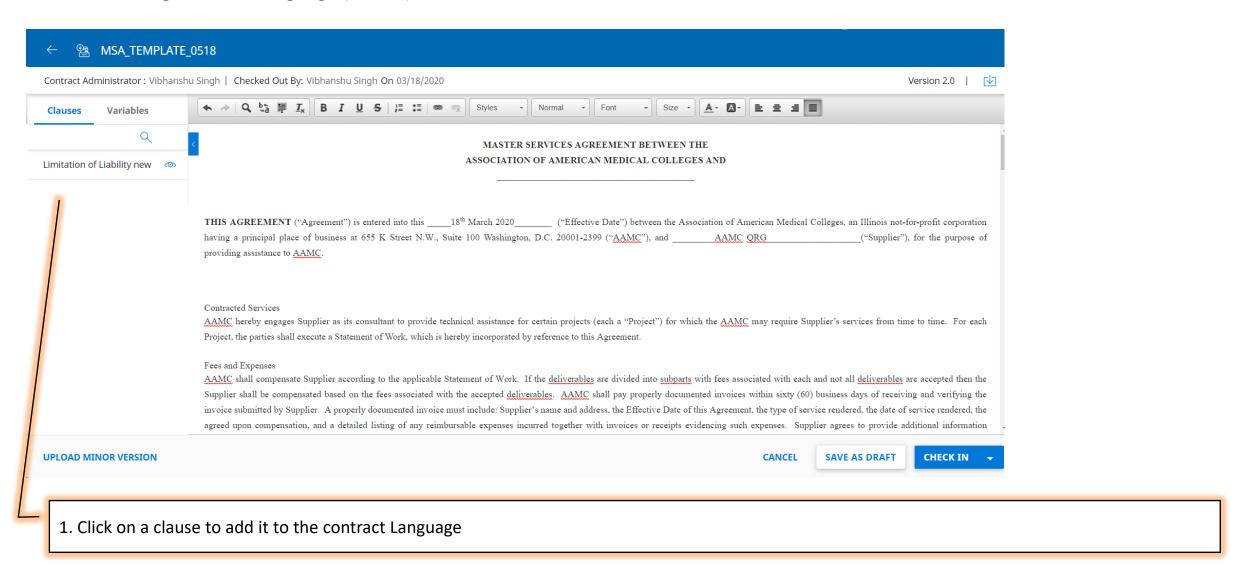




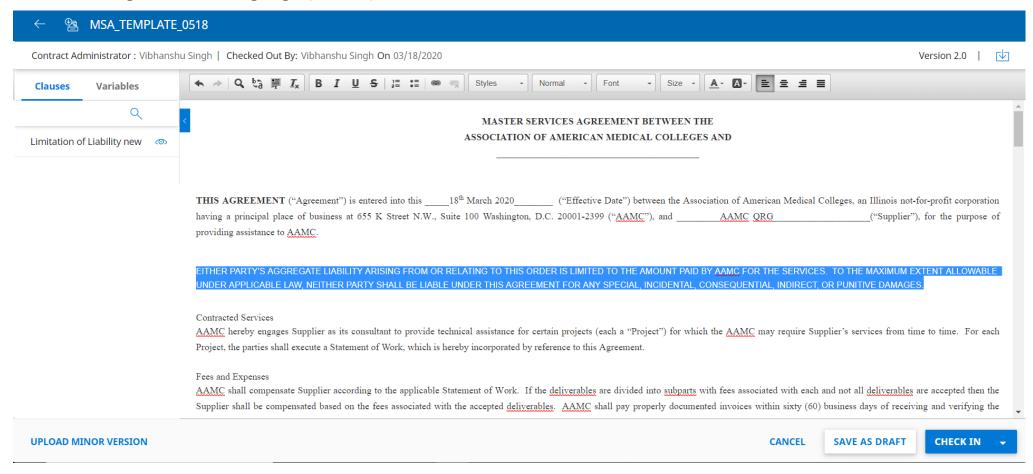
1. Any changes contract will be reflected in this

2. You can add Clauses and Variables to the Contract Language from this section



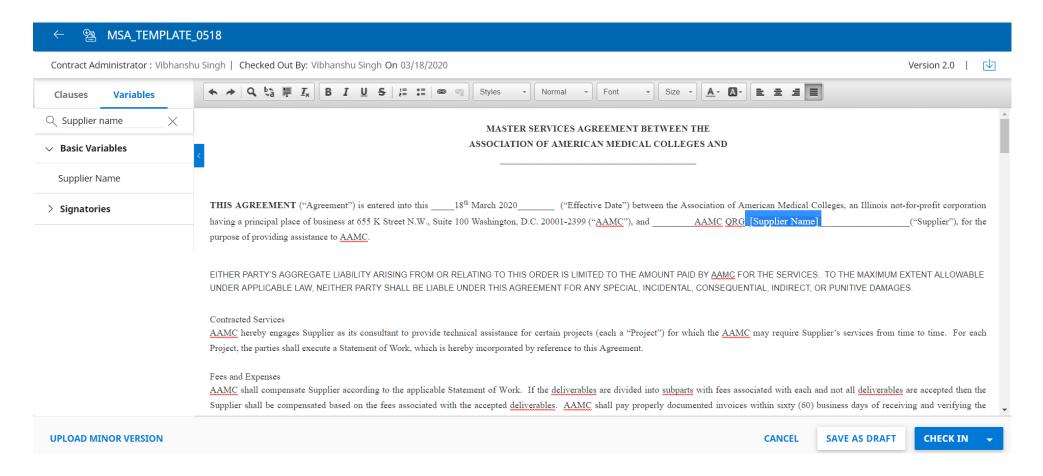






The highlighted sections shows the clause that has been added to the Contract Language

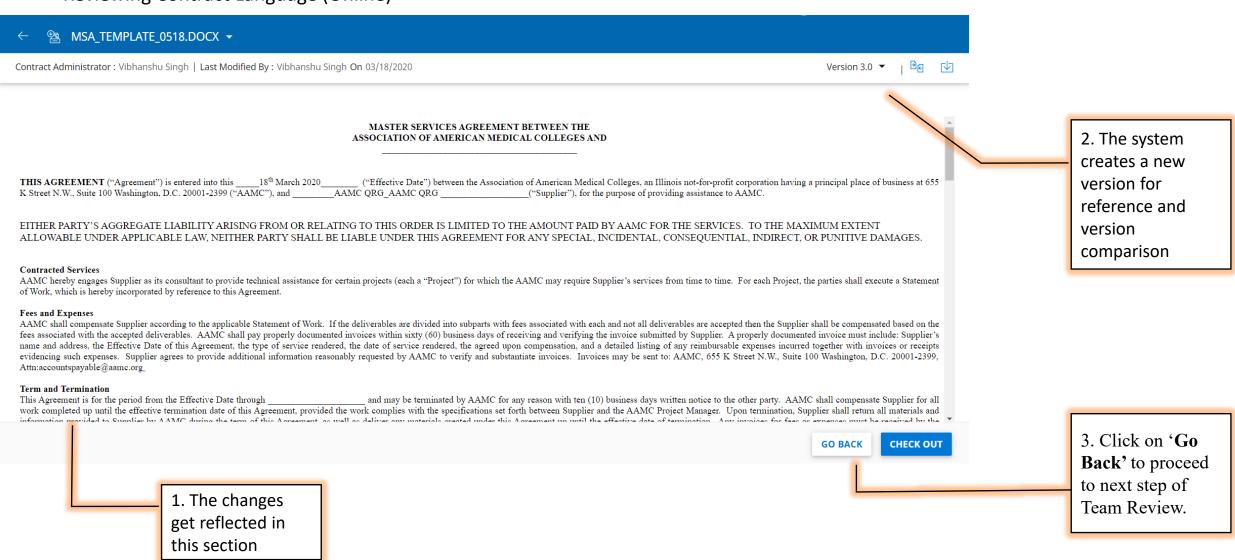




Click on Check-In to finalize the changes you've made to the document and proceed further.



Reviewing Contract Language (Online)





Reviewing Contract Language (Word-Plugin)

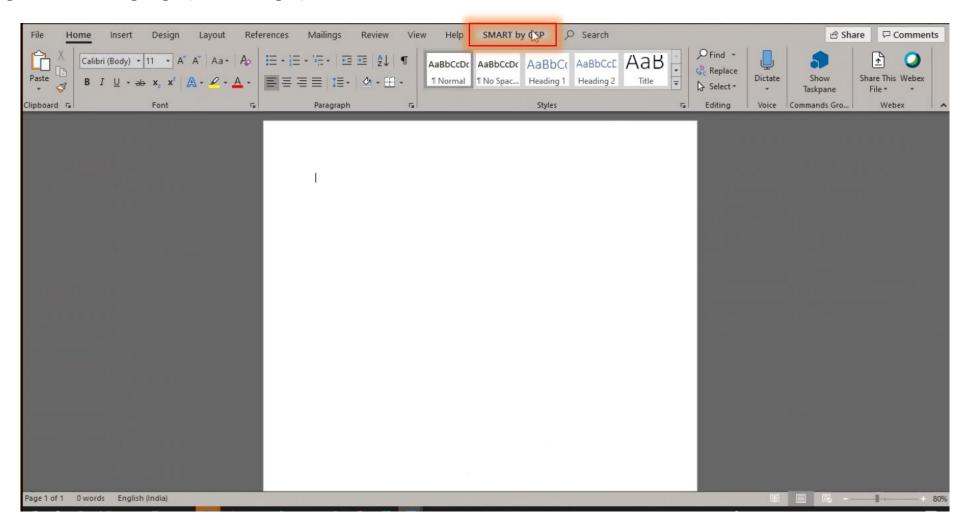
1. To review contract language online, first click on the **contract language section**



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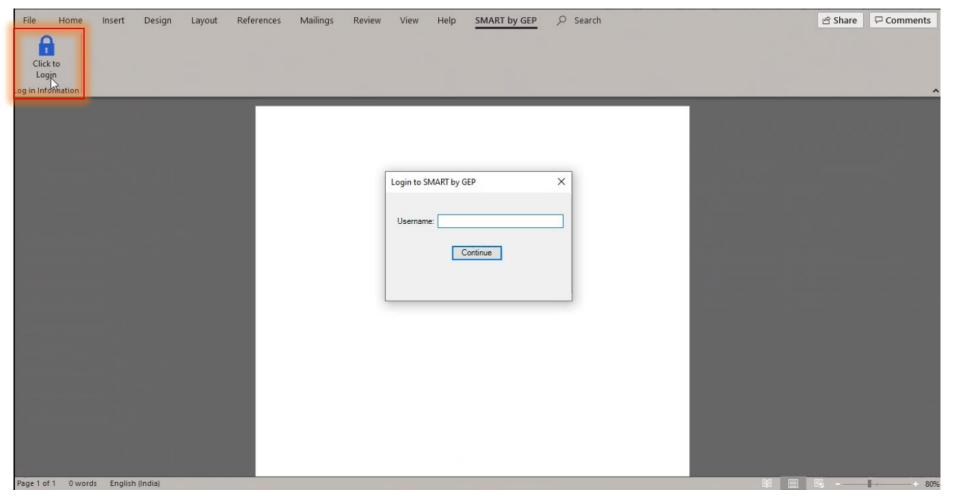
Unified Source-to-Pay Platform





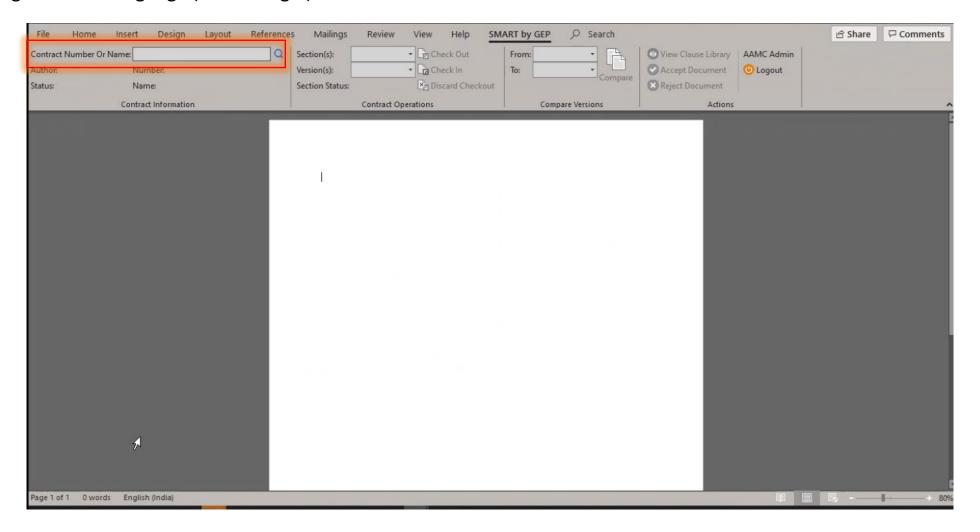
After installing the Plugin, open a blank document in Microsoft Word and Click on SMART by GEP tab





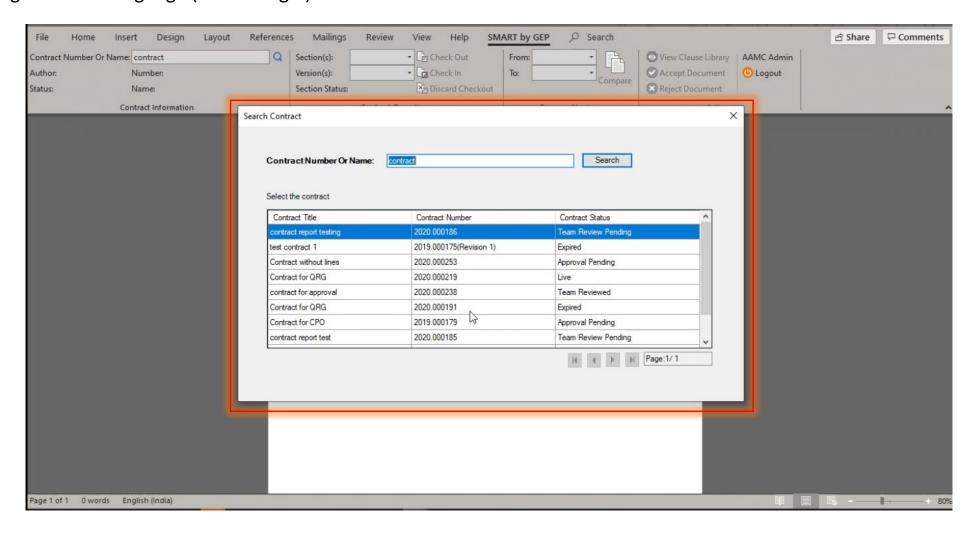
- Click on 'Click to Login' button
- Enter your full credentials from SMART





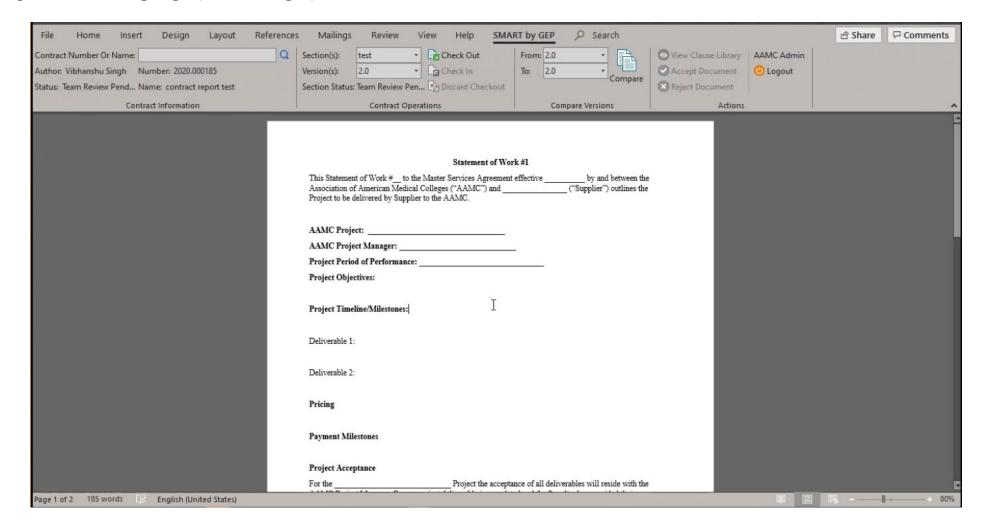
- The following screen appears after the user logs into Word-Plugin
- You can search for Contracts by their name in the search box highlighted above





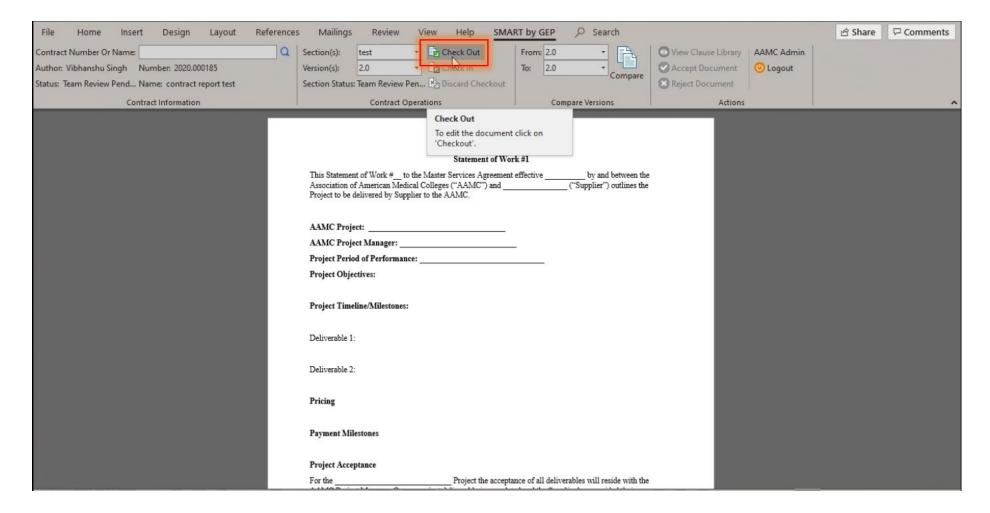
You can search for Contracts by their name in the search box highlighted above





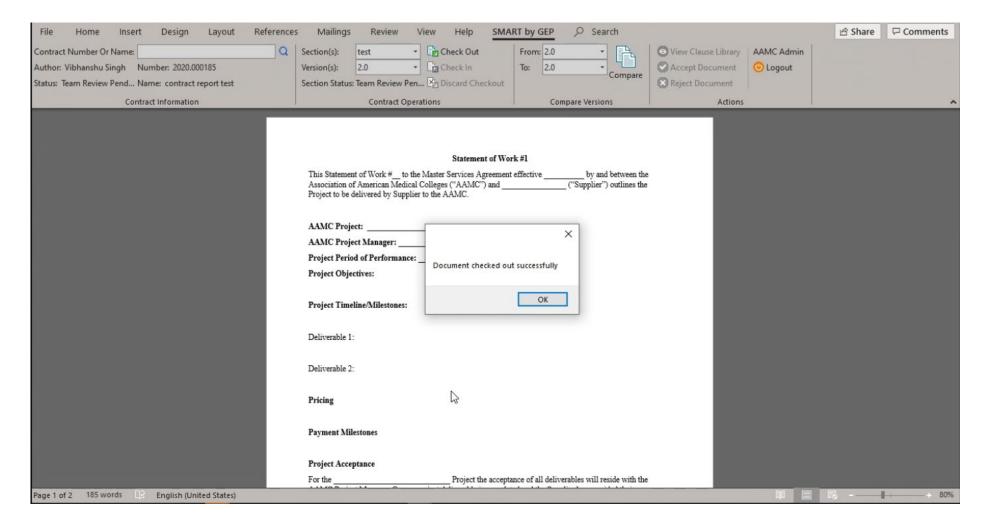
The selected contract is now available for editing and reviewing





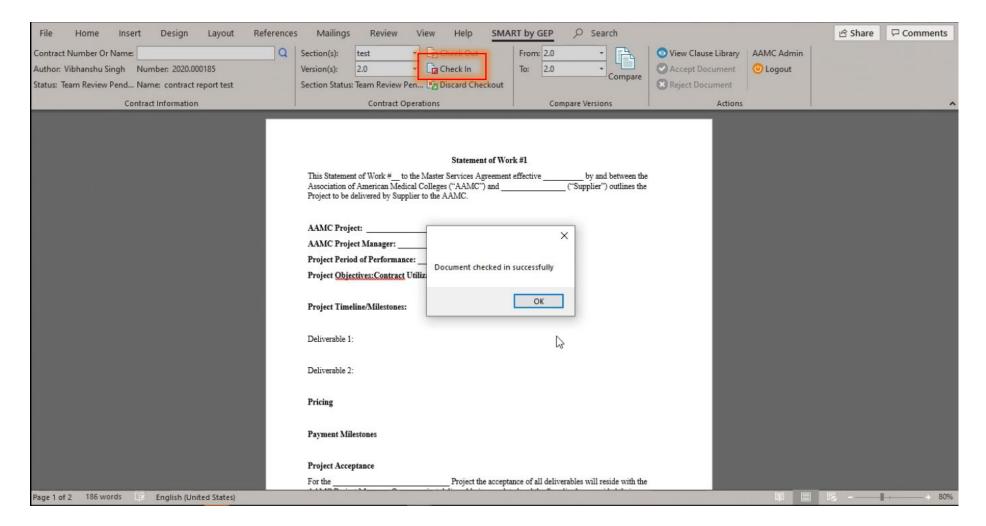
Click on 'Check Out' to start editing and reviewing the Contract





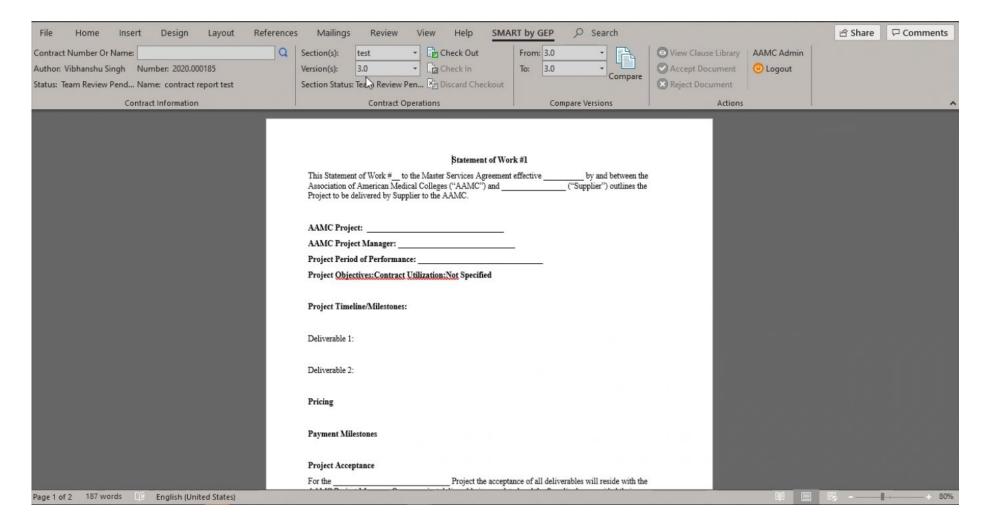
• The Document is successfully checked out





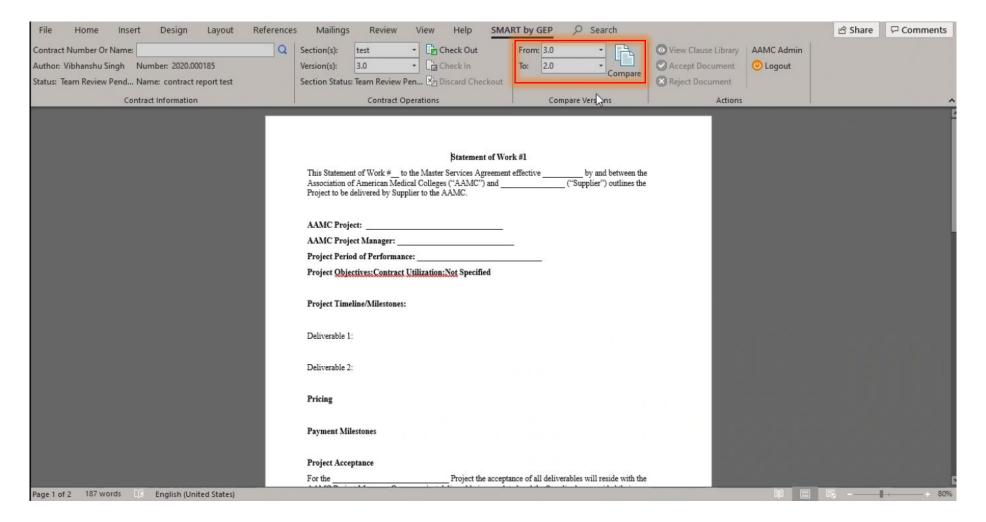
After making the required changes, click on 'Check In'





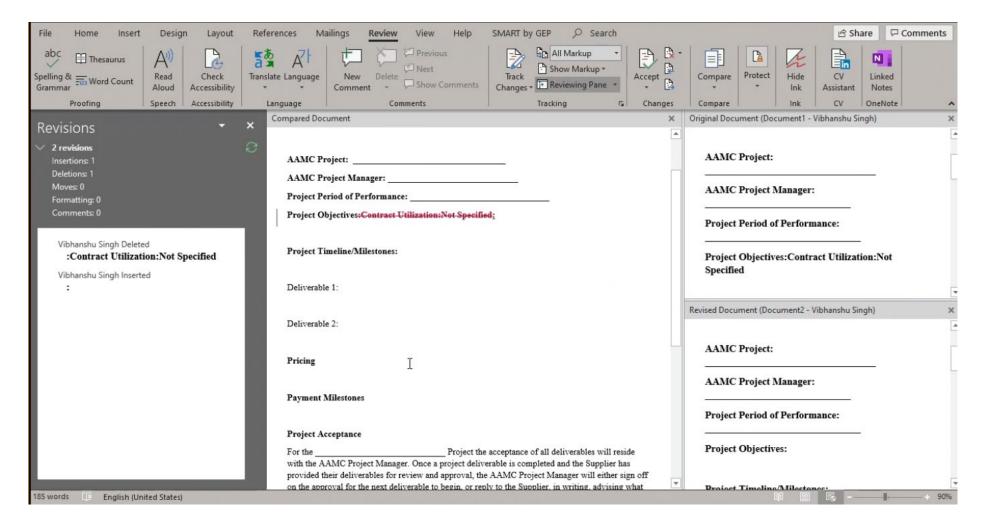
The changes are now saved in SMART by GEP





• The changes made to a Contract can be compared to it's previous versions by selecting the two versions and clicking on 'Compare', in the section highlighted in the above screenshot

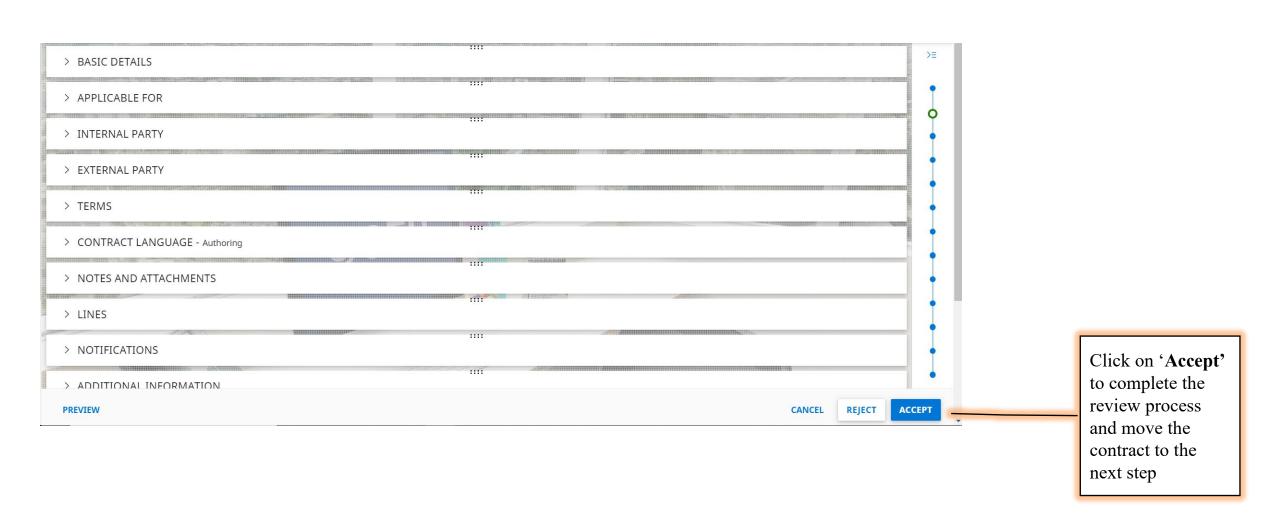




The following screen appears on clicking on 'Compare'

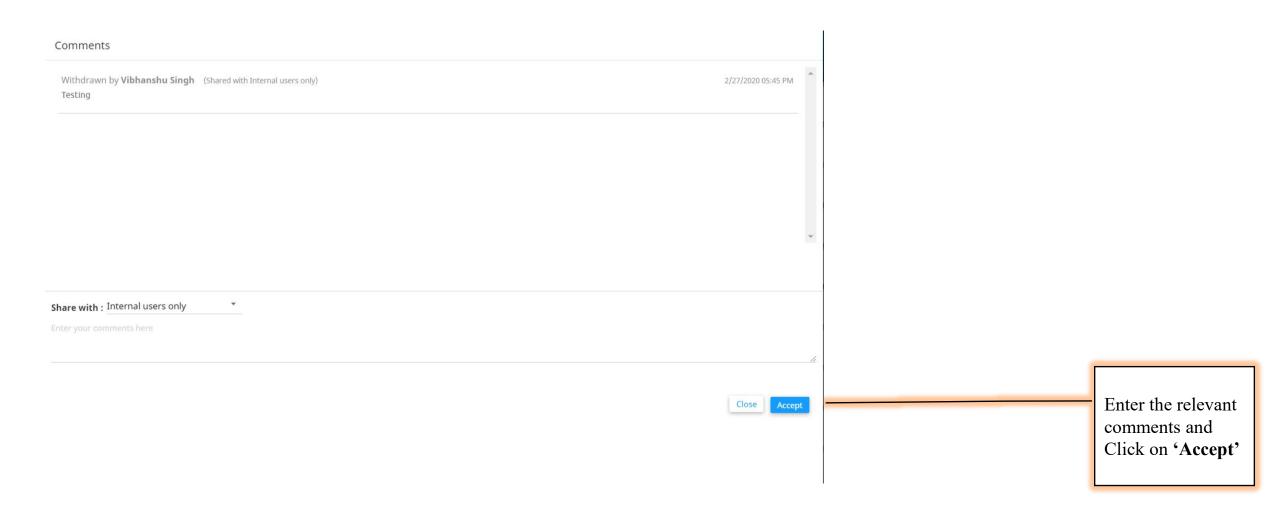


Reviewing a Contract





Reviewing a Contract





• When a contract is ready to be signed, the supplier signatory will receive a task via email. To sign, click on the task:

- Suppliers must sign before AAMC will sign a document
- Click "Sign Contract"

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When prompted, select the mode you would like to use.





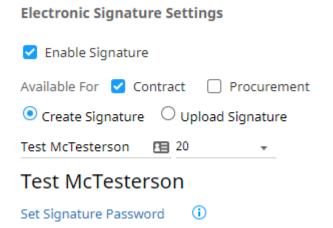
CLOSE

Please select signature method • To sign offline, when prompted, select "Offline Mode". Offline mode Online mode Download the document Offline Signature Please download document for offline signature. Sign and upload again and click "close" Attachments Drag and drop file here OR UPLOAD DOCUMENTS Supported file formats: .pdf. Limited to file(s) of 10MB each. Maximum 5 files can be uploaded at a time.

You have completed the task and it will now go back for Buyer signature.



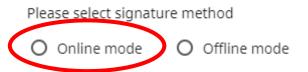
- To sign a contract on the SMART system, you must first set up your Password. To do this:
- Click your Profile Icon:



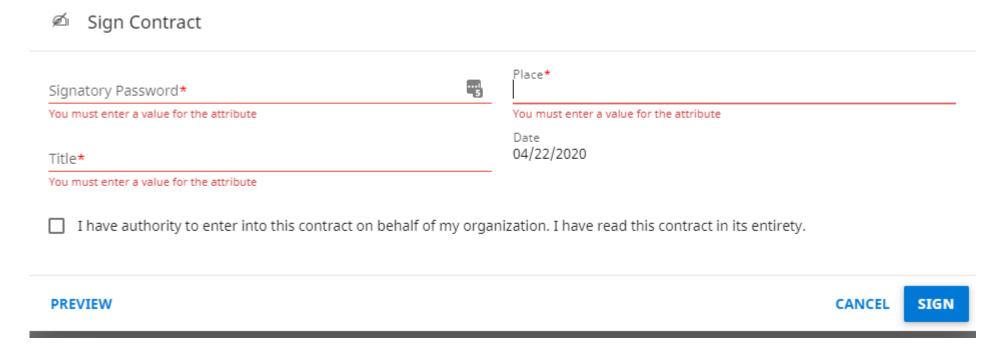
- At the bottom, look at the Electronic Signature Settings, click "enable Signature,
- Click "Contract"
- Then either create your signature, which will be a basic Text Signature with limited fonts, or Upload a picture of your actual signature. The latter is preferred.
- Set a Signature Password and make sure to note it.



To sign online, select "Online Mode"



Fill in the required fields and click "sign":



• You have completed the task and it will now go back for Buyer signature.