• 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
Reviewing a Contract

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

Click the **contract name** and navigate to the **Contract Summary screen**.
• 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.
Reviewing a Contract

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

### BASIC DETAILS

### APPLICABLE FOR

### INTERNAL PARTY

### EXTERNAL PARTY

### TERMS

### CONTRACT LANGUAGE - Authoring

### NOTES AND ATTACHMENTS

### LINES

### NOTIFICATIONS

### ADDITIONAL INFORMATION
Reviewing a Contract

• Reviewing Contract Language (Offline)

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

2. Click on the Contract Name to access the contract editing workspace
Reviewing a Contract

• Reviewing Contract Language (Offline)

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

The contract body is displayed in this section
Reviewing a Contract

• Reviewing Contract Language (Offline)

Open the document in MS Word, make the necessary changes, save the document to a folder on your computer.

Note: You can enable Track Changes in MS Word, however SMART will highlight any changes made to the contract compared to its previous versions.
Reviewing a Contract

• Reviewing Contract Language (Offline)

To upload the updated contract language click on Upload Minor Version.
Reviewing a Contract

- Reviewing Contract Language (Offline)

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
Reviewing a Contract

• Reviewing Contract Language (Offline)

The changes get reflected in this section.

The system creates a new version for reference and version comparison.

3. Click on ‘Check in’ from the dropdown to proceed to next step of Team Review.
Reviewing a Contract

- Reviewing Contract Language (Online)

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

2. Click on the Contract Name to access the contract editing workspace.
Reviewing a Contract

• Reviewing Contract Language (Online)

1. Click on Check Out button

The contract body is displayed in this section
Reviewing a Contract

- Reviewing Contract Language (Online)

1. Click on Continue Editing button
Reviewing a Contract

• Reviewing Contract Language (Online)

1. Any changes made to a contract will be reflected in this section.

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

- Reviewing Contract Language (Online)

1. Click on a clause to add it to the contract Language
Reviewing a Contract

• Reviewing Contract Language (Online)

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 a Contract

• Reviewing Contract Language (Online)

1. The changes get reflected in this section

2. The system creates a new version for reference and version comparison

3. Click on ‘Go Back’ to proceed to next step of Team Review.
Reviewing a Contract

• Reviewing Contract Language (Word-Plugin)

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

2. Click on ‘Download Plugin to draft online’ button to download the Word Plugin and install it
Reviewing a Contract

• Reviewing Contract Language (Word-Plugin)

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

- Reviewing Contract Language (Word-Plugin)

  - Click on ‘Click to Login’ button
  - Enter your full credentials from SMART
Reviewing a Contract

• Reviewing Contract Language (Word-Plugin)

• 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
Reviewing a Contract

- Reviewing Contract Language (Word-Plugin)

- You can search for Contracts by their name in the search box highlighted above
Reviewing a Contract

• Reviewing Contract Language (Word-Plugin)

• The selected contract is now available for editing and reviewing
Reviewing a Contract

- Reviewing Contract Language (Word-Plugin)

- Click on ‘Check Out’ to start editing and reviewing the Contract
Reviewing a Contract

• Reviewing Contract Language (Word-Plugin)

• The Document is successfully checked out
Reviewing a Contract

• Reviewing Contract Language (Word-Plugin)

• After making the required changes, click on ‘Check In’
Reviewing a Contract

• Reviewing Contract Language (Word-Plugin)

• The changes are now saved in SMART by GEP
Reviewing a Contract

- Reviewing Contract Language (Word-Plugin)

  - 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.
Reviewing a Contract

- Reviewing Contract Language (Word-Plugin)

- The following screen appears on clicking on ‘Compare’
Reviewing a Contract

- Reviewing a Contract

Click on ‘Accept’ to complete the review process and move the contract to the next step.
Reviewing a Contract

- Reviewing a Contract

Enter the relevant comments and Click on ‘Accept’
• 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”

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

  Please select signature method
  ○ Online mode   ○ Offline mode
• To sign offline, when prompted, select “Offline Mode”.

• Download the document

• Sign and upload again and click “close”

• 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:

  Electronic Signature Settings
  
  - Enable Signature
  - Available For: [Contract] [Procurement]
  - Create Signature [Upload Signature]
  
  Test McTesterson

  - Set Signature Password

• 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.
Signing a Contract - Online

• To sign online, select “Online Mode”

Please select signature method

☐ Online mode  ☐ Offline mode

• Fill in the required fields and click “sign”:

Signatory Password
You must enter a value for the attribute

Title
You must enter a value for the attribute

Place
You must enter a value for the attribute

Date
04/22/2020

☐ I have authority to enter into this contract on behalf of my organization. I have read this contract in its entirety.

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