CMS User Manual

PREPARED BY
TEAM JMS

JMS ADVISORY SERVICES PVT.LTD

Document Information

Document Title	
File Name	CMS User Manual -version 1.0
Team	JMS
Project	Contract Management System

Prepared By

Team JMS

Reviewed By

Name	Role	Date	Comments
Nirali Thakkar	Lead SharePoint Developer		

Index

1. Introduction

A **Contract Management System (CMS)** is a centralized digital platform designed to facilitate the management of contracts throughout their entire lifecycle. It helps organizations efficiently create, store, track, and manage contracts, ensuring compliance, reducing risks, and improving operational efficiency. The system streamlines the contract approval process, automates reminders for renewals and expirations, and provides secure access control for authorized users.

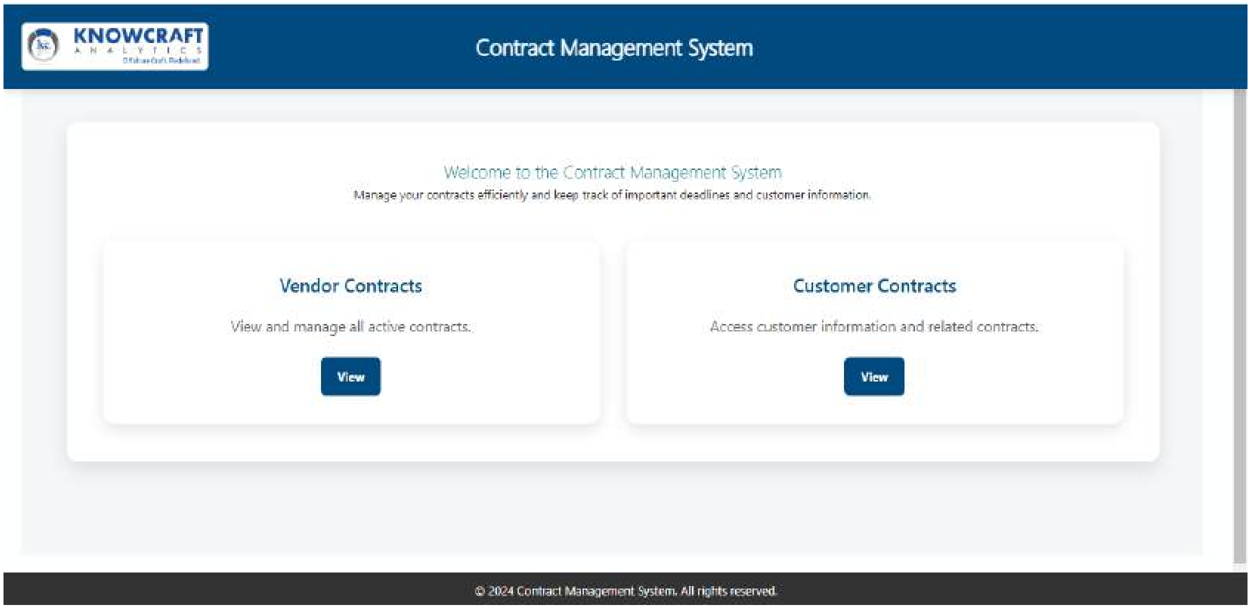
2. Users

Admins: Users with full access to manage accounts, oversee workflows, and ensure compliance.
Managers: Users who need to monitor contract statuses, performance metrics, and approval processes.
General Users: Individuals responsible for entering contract data, tracking approvals, and generating reports.

3. Contract Management System

Contract Management System	https://knowcraft.sharepoint.com/sites/CMS/SitePages/Main.aspx?web=1

3.1 Getting Started



Accessing the System: Upon logging in, you will be greeted with the homepage as shown in the image.

Choosing a Section: To manage vendor contracts, click the **"View"** button under the **Vendor Contracts** section.

To manage customer-related contracts, click the **"View"** button under the **Customer Contracts** Section.

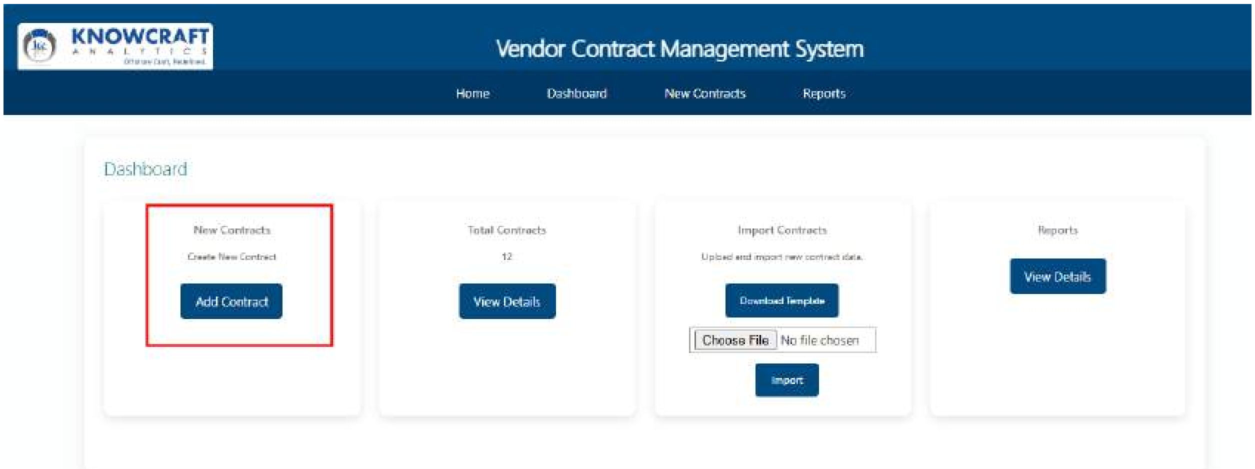
Exploring the Features: Once inside a section, you can view, edit, or add contracts based on your access permissions.

Returning to the Homepage: Use the navigation menu or a "Home" button (if available) to return to this starting page.

To begin using the system, you will need to register for an account or log in if you already have one. Once logged in, your access will be determined by your role: Admin or User.

Vendor Contract Management System – Dashboard

- The **Dashboard** serves as the central hub for managing vendor contracts. It is divided into four main sections, each providing distinct functionalities to streamline contract management:



- **New Contracts:** *Add Contract*

  Function: Allows users to create a new vendor contract. Clicking this button directs the user to the contract creation form where relevant details can be added.

- **Total Contracts:** *View Details*

  Function: Displays the total number of contracts in the system. Clicking this button provides a detailed view of all the existing contracts in the database.

- **Import Contracts: Downloads** a preformatted template to assist with uploading new contract data in bulk.

  Choose File: Enables users to select a file for importing contract data.
  Import: Initiates the upload and import process for the selected file.
  Function: Facilitates bulk uploading of contract data using a standardized template.

- **Reports:** *View Details*

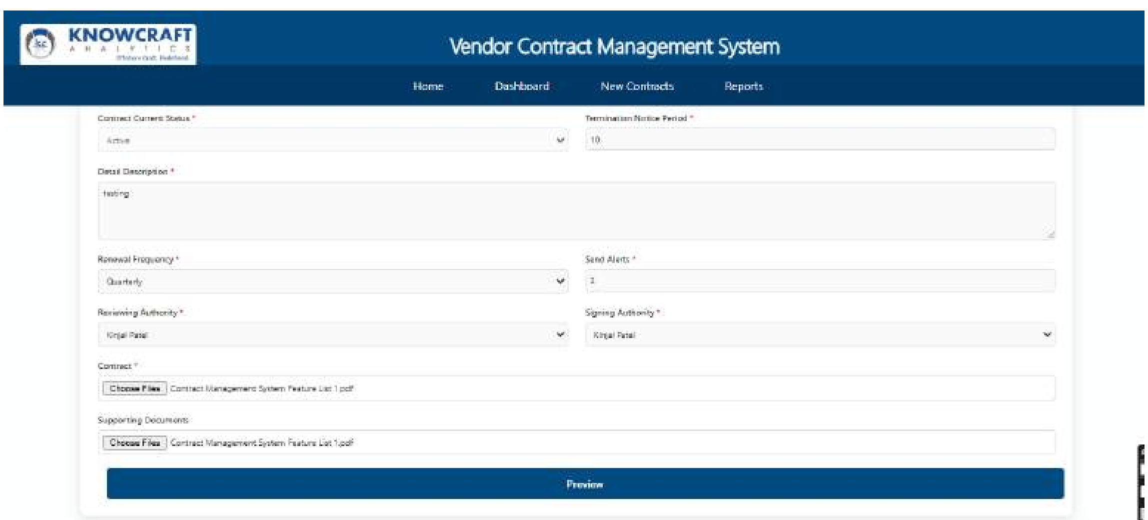
Function: Provides access to reports related to contracts. Clicking this button allows users to view and analyze contract data through predefined or custom reports.

- **New Contracts:** *Add Contract*

Function: Allows users to create a new vendor contract. Clicking this button directs the user to the contract creation form where relevant details can be added.

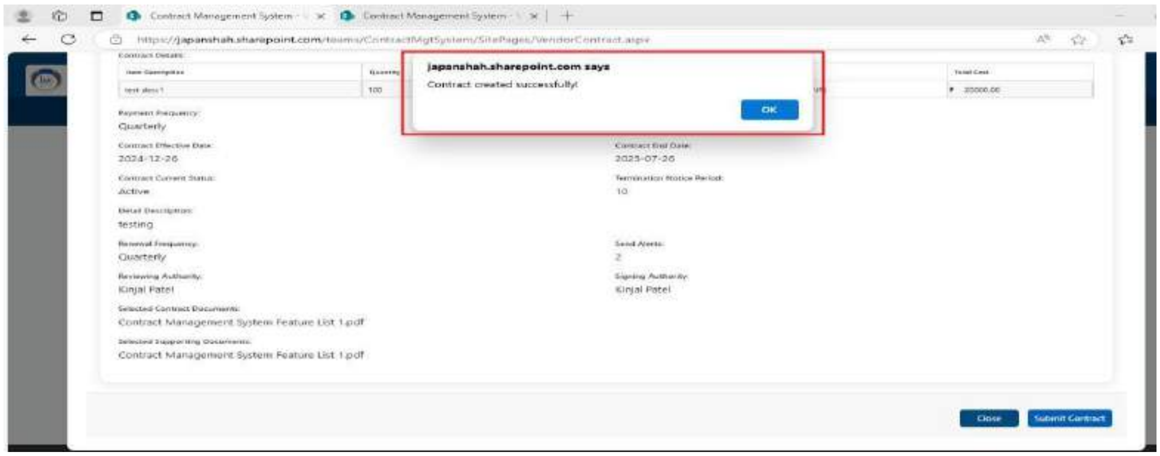
3.2 Steps to Create a New Contract:

- Log in to the Vendor Contract Management System with your credentials.
- Navigate to the **Dashboard**.
- Locate the **New Contracts** section.
- Click the **Add Contract** button.
    - This action will open the contract creation form.

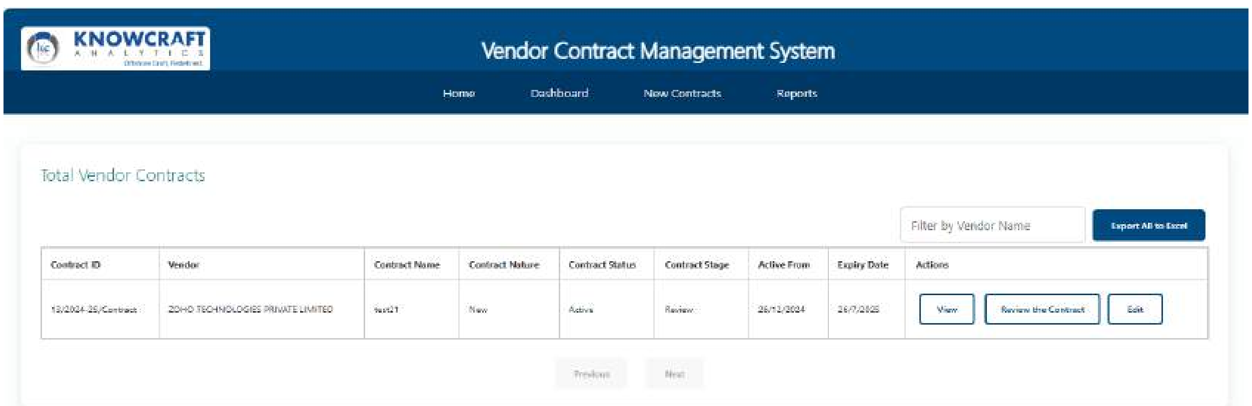


- Complete the required fields in the form, including::
    - Vendor details (e.g., name, contact information).
    - Contract details (e.g., start date, end date, terms).

- Any additional custom fields required by your organization.



- Review the entered information for accuracy.



- Submit the form by clicking the **Save** or **Submit** button (as applicable).

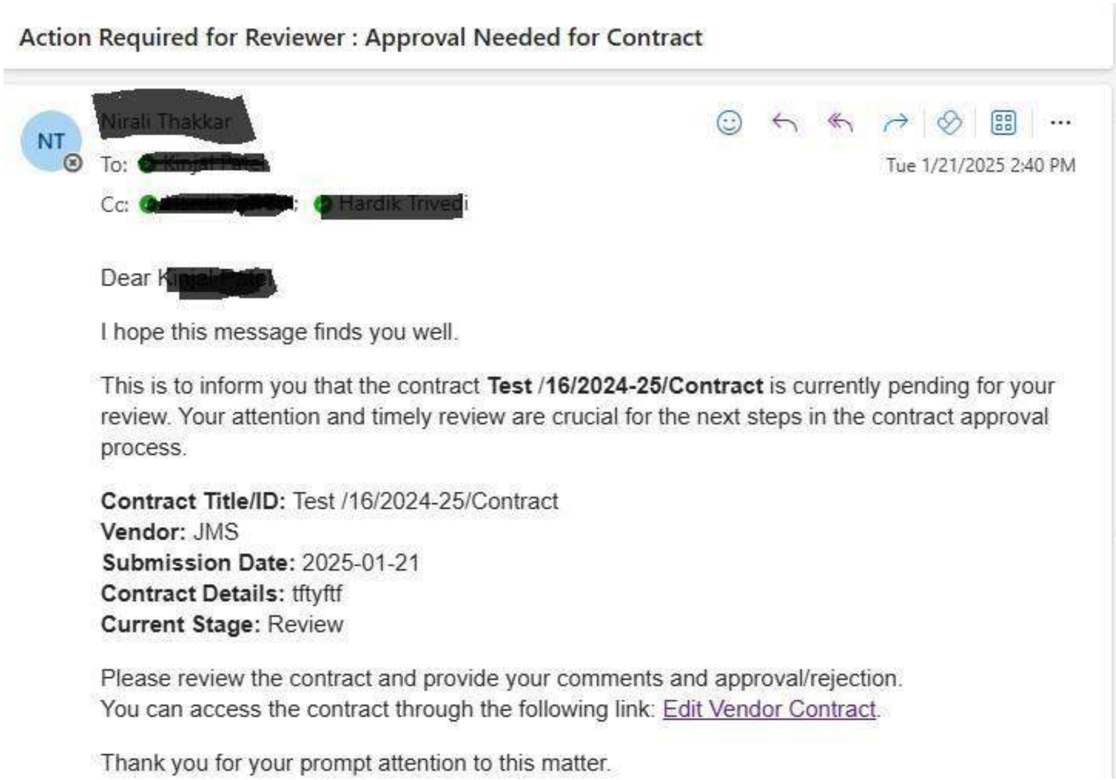
Once submitted, the contract will be saved in the system and accessible for further actions such as review, approval, or reporting, depending on the workflow configuration.

Next Steps after Creating a Contract:

- **Preview the Contract:**
  - After submitting the contract, check if a preview option is available to review the contract format and content.
- **Approval Process**:
  - The contract will be routed to the approver(s) for verification.
  - Monitor the approval status under the **Total Contracts** or **Pending Contracts** Section.
- **Edit or Update the Contract (if needed)**:
  - If changes are required, locate the created contract under the **Total Contracts** Section, click **Edit**, and make the necessary updates.
- **Finalize and Activate**:
  - Once the contract is approved, it can be activated or made effective as per organizational workflows and goes for sign stage where the signing authority reviews and signs the contract. Monitor the approval status in the Total Contracts or Pending Contracts section.

3.3 Overview of the Review Phase:

- **Automatic Routing for Review**:
  - Upon submission, the contract is automatically forwarded to the designated **Reviewer(s)** or **Approver(s)** based on the organization's workflow settings.
- **Notification to Reviewer**:
  - The assigned reviewer(s) will receive a notification (via email) indicating that a contract is pending review.



Action Required for Reviewer : Approval Needed for Contract

NT [redacted]

To: [redacted]

Cc: [redacted]; [redacted]

Tue 1/21/2025 2:40 PM

Dear [redacted]

I hope this message finds you well.

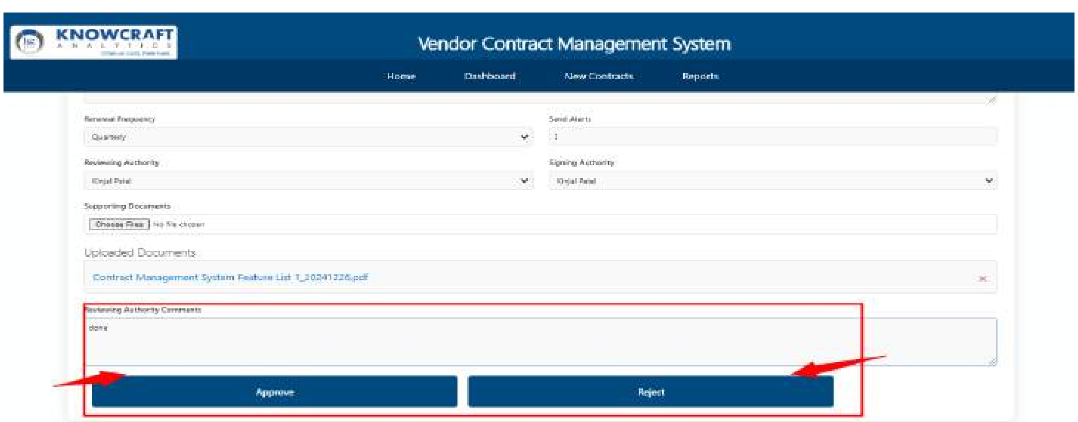
This is to inform you that the contract **Test /16/2024-25/Contract** is currently pending for your review. Your attention and timely review are crucial for the next steps in the contract approval process.

Contract Title/ID: Test /16/2024-25/Contract
Vendor: JMS
Submission Date: 2025-01-21
Contract Details: tftyftf
Current Stage: Review

Please review the contract and provide your comments and approval/rejection.
You can access the contract through the following link: Edit Vendor Contract.

Thank you for your prompt attention to this matter.

- **Accessing the Submitted Contract for Review**:
  - The reviewer logs in to the **Vendor Contract Management System** and navigates to the **Pending Contracts** or **Review Queue** section.
  - The submitted contract appears with its status marked as **Pending Review**.



Reviewer Actions:

- **Review Contract Details**:
  - Open the contract and carefully review all entered details, such as vendor information, terms, dates, and any attached documents.
- **Provide Feedback or Comments (if required)**:
  - If corrections or updates are needed, the reviewer can add comments or suggestions and send the contract back to the creator for modifications.
- **Approve or Reject the Contract**:
  - **Approval**: If the contract meets all requirements, the reviewer clicks the **Approve** button. The contract status changes to **Approved** and moves to the next phase (e.g., Activation or Execution).
  - **Rejection**: If the contract is incomplete or invalid, the reviewer clicks the **Reject** button. The contract is sent back to the creator with remarks for necessary corrections.

Key Features during the Review Phase:

- **Status Tracking**:
  - Creators and other stakeholders can track the contract's progress in the **Dashboard** under sections like **Pending Contracts** or **Total Contracts**.

Notes for Users:

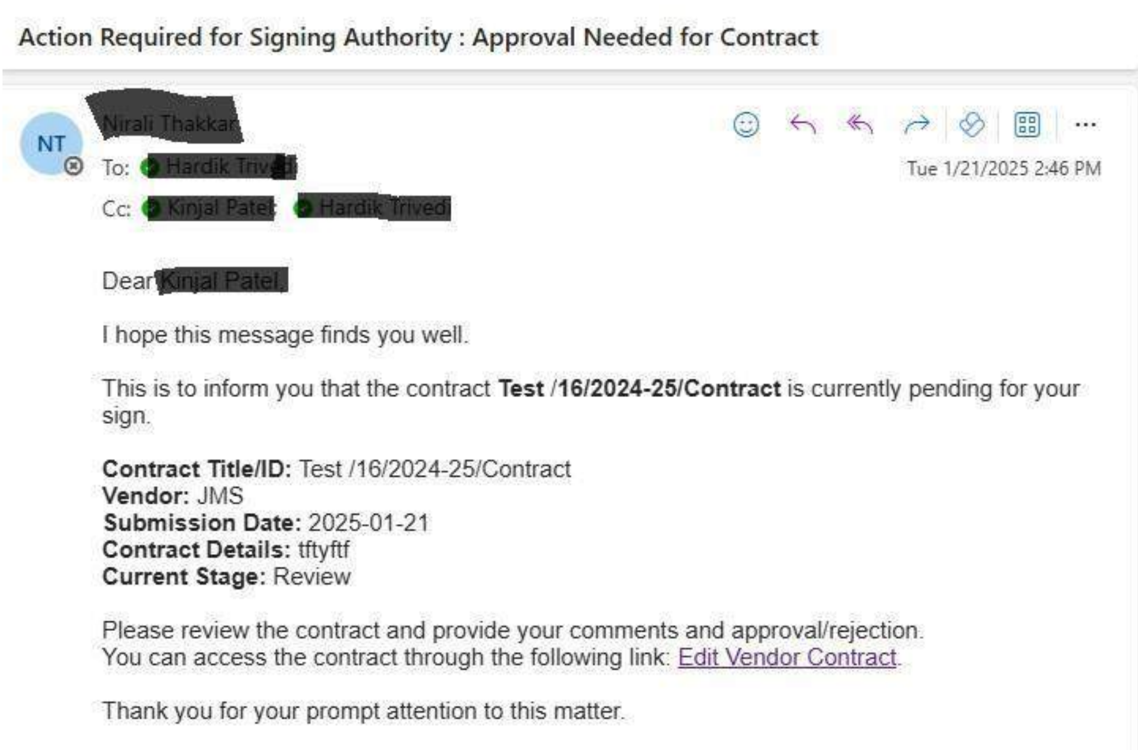
- Only users assigned as **Reviewers** or **Approvers** can perform actions in this phase.
- Ensure all required documents and fields are completed correctly during the creation phase to avoid delays in the review process.

3.4 Approval or Rejection Phase

After the **Review Phase**, the contract moves into the **Approval or Rejection Phase**, where the final decision is made based on the feedback and analysis of the reviewers. This phase determines whether the contract proceeds to activation or is sent back for modifications.

Overview of the Approval or Rejection Phase:

- **Notification to Approvers**:
  - Once the contract is reviewed, the designated **Approver(s)** are notified (via email or system alerts) about the pending approval.



Action Required for Signing Authority : Approval Needed for Contract

NT [redacted]

To: [redacted]

Cc: [redacted] [redacted]

Tue 1/21/2025 2:46 PM

Dear [redacted]

I hope this message finds you well.

This is to inform you that the contract **Test /16/2024-25/Contract** is currently pending for your sign.

Contract Title/ID: Test /16/2024-25/Contract
Vendor: JMS
Submission Date: 2025-01-21
Contract Details: tftyftf
Current Stage: Review

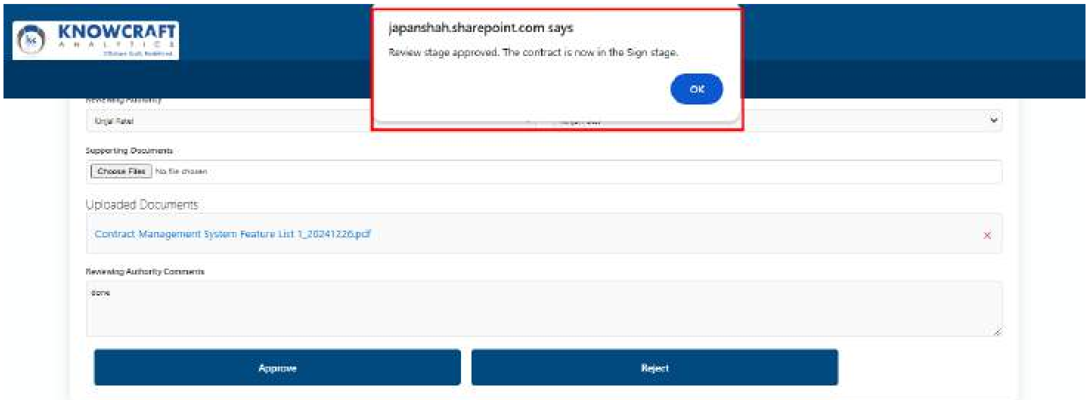
Please review the contract and provide your comments and approval/rejection.
You can access the contract through the following link: Edit Vendor Contract.

Thank you for your prompt attention to this matter.

- **Accessing the Contract**:
  - The approver logs in to the **Vendor Contract Management System** and navigates to the **Pending Approval** section.
  - The contract appears with its status marked as **Awaiting Approval**.

Approver Actions:

- **Review Feedback and Final Contract Details**:
  - The approver reviews the contract, including any feedback or corrections provided by the reviewers.
  - All attached documents, vendor information, and contract terms must be carefully validated to ensure compliance and accuracy.



- **Decision-Making**:
  - **Approval**:
    - If the contract meets all organizational and compliance requirements, the approver clicks the **Approve** button.
    - The contract status changes to **Approved**, and it moves to the next phase, such as activation or execution.
    - A notification is sent to the creator and other relevant stakeholders informing them of the approval.
  - **Rejection**:
    - If the contract is incomplete, incorrect, or fails to meet the required standards, the approver clicks the **Reject** button.
    - The contract is sent back to the creator or reviewer with detailed remarks highlighting the reasons for rejection.
    - The contract status changes to **Rejected**, and the creator is required to make the necessary corrections and resubmit the contract for review.

Key Features in the Approval or Rejection Phase:

- **Status Tracking**:
  - The status of the contract, such as **Awaiting Approval**, **Approved**, or **Rejected**, is visible to all relevant stakeholders in the **Dashboard**.
  - Creators and reviewers can monitor progress and stay informed.
- **Approval Log**:
  - The system maintains a log of all approvals and rejections, capturing details such as the approver's name, timestamp, and decision remarks.

Notes for Users:

- Only users with **Approver** roles can perform actions in this phase.
- Clear and detailed remarks during rejection help streamline the re-submission process.
- Timely approvals are crucial to avoid delays in subsequent phases such as activation or execution.

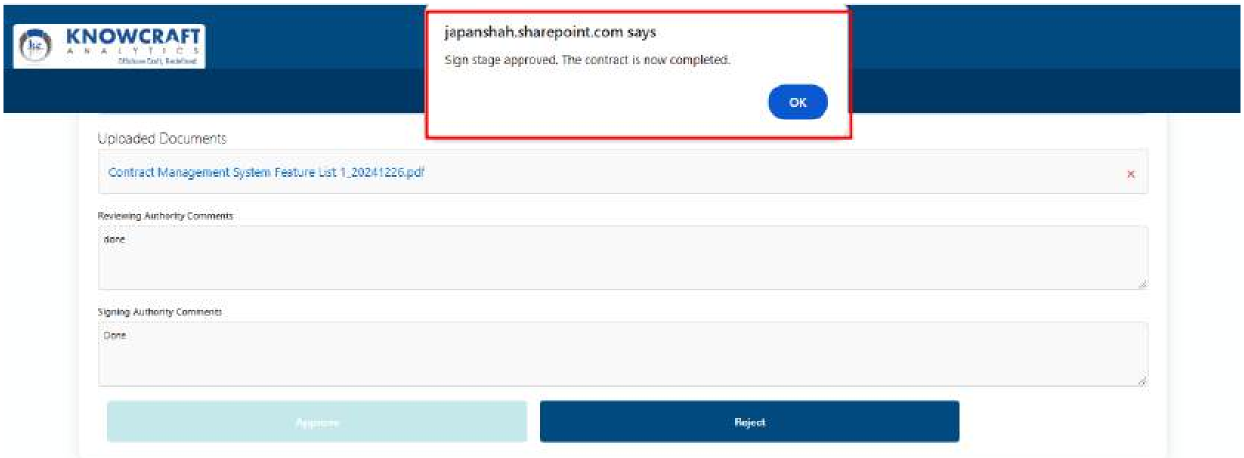
3.5 Signing Phase:

- **Notification to Signatories**:
  - Once the contract is approved, designated signatories receive a notification (via email or system alerts) informing them that the contract is ready for signing.
- **Accessing the Contract**:
  - Signatories log in to the **Vendor Contract Management System** and navigate to the **Pending Signatures** section.
  - The contract appears with its status marked as **Awaiting Signature**.

Actions in the Signing Phase:

- **Review Contract before Signing**:
  - Signatories can open the contract to review its contents, including vendor details, terms, conditions, and attachments, ensuring that everything is accurate and acceptable before signing.
- **Provide Signatures**:
  - **Electronic Signature**:
    - If the system supports electronic signatures, signatories can add their signatures directly through the platform by clicking the **Sign** button.
  - **Manual Signature**:
    - If manual signing is required, the system allows users to download the contract.
    - After signing, the signed document is scanned and uploaded back into the system.
- **Confirm Signing**:

    - Once the signature is added, the contract status is updated to **Signed** for that specific signatory.



Key Features in the Signing Phase:

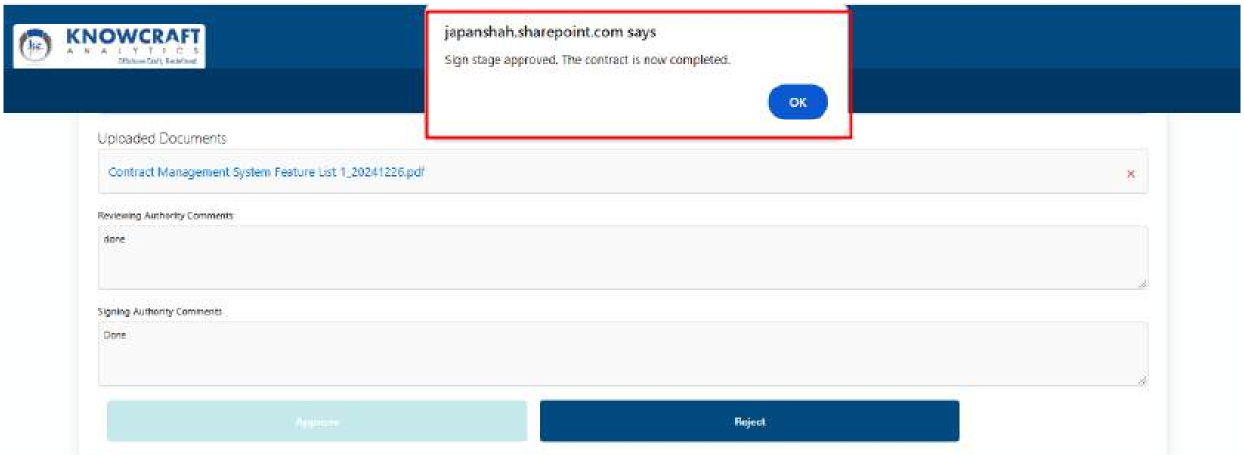
- **Status Tracking**:
    - The **Dashboard** displays the progress of the signing process, including which signatories have signed and which are still pending.
- **Reminder Notifications**:
    - If signatories do not complete the signing process within a specified time, automatic reminders are sent to ensure timely completion.

Notes for Users:

- Ensure that all required parties are assigned as signatories during the contract creation or approval phase.
- Double-check the contract's details before signing, as the signed contract becomes legally binding.
- The signing process must be completed by all designated signatories to proceed to the next phase.

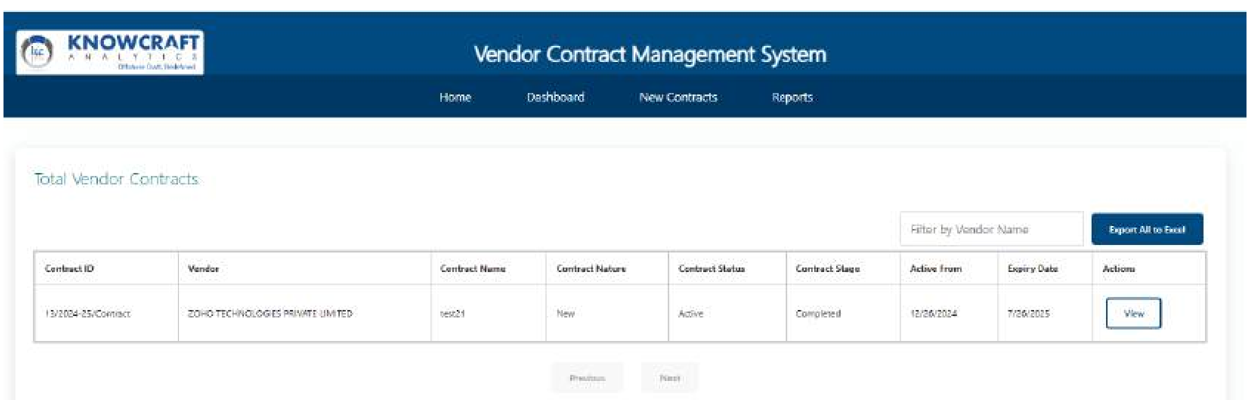
3.6 Contract Completion Phase

After all designated signatories have provided their signatures, the contract is officially approved. This phase signifies the completion of the agreement and transitions the contract into the **Activation or Execution Phase**.

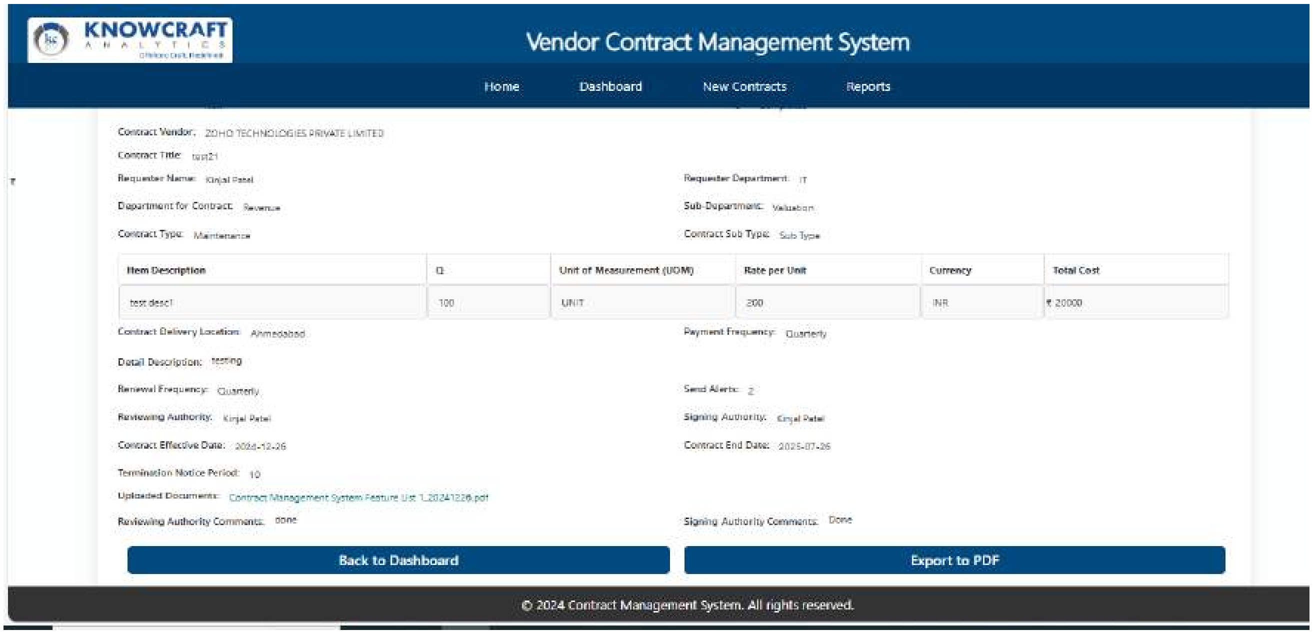


Notes for Users:

- Approved contracts are now enforceable and should be monitored for compliance with agreed terms and conditions.



- Any post-approval amendments will require a new review and signing process.



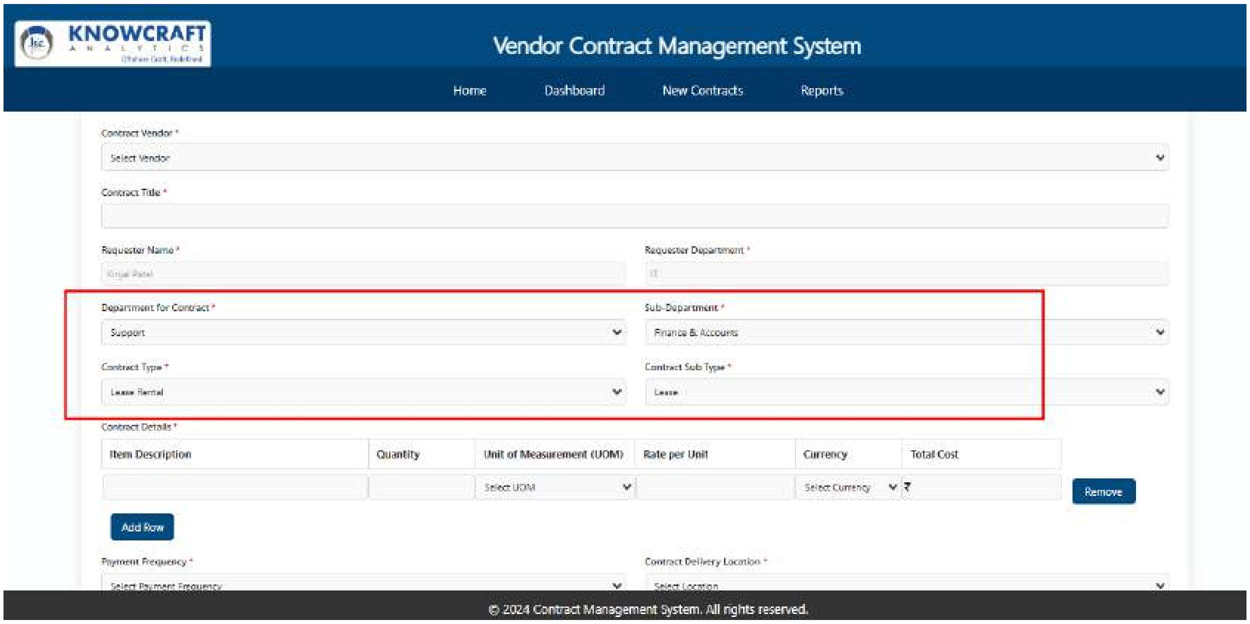
- After completing all the steps, the user can export the contract file in PDF format.

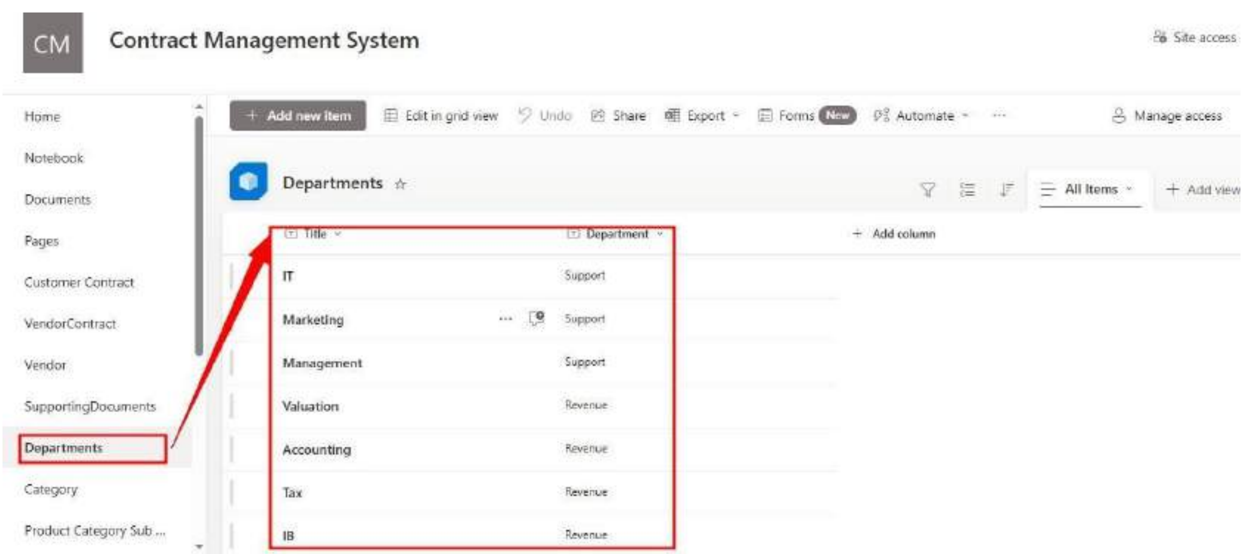
3.7 Backend Site Content:

Managing Departments, Users, and Bulk Updates in SharePoint Backend

1. Adding Departments

To add a new department in the SharePoint backend:



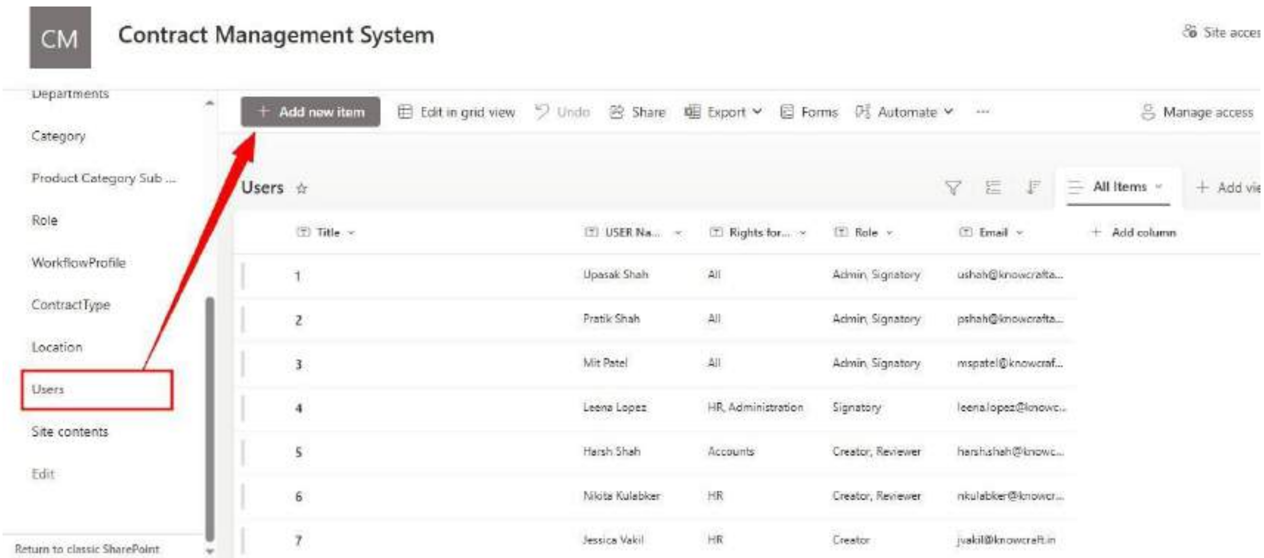


- Navigate to the **Departments** list in SharePoint.
- Click on **New Item**.
- Enter the **Department Name** and other relevant details.
- Click **Save**.
- The department will now be available for selection in the Contract Management System.

2. Adding New Users

To add a new user in the SharePoint backend:

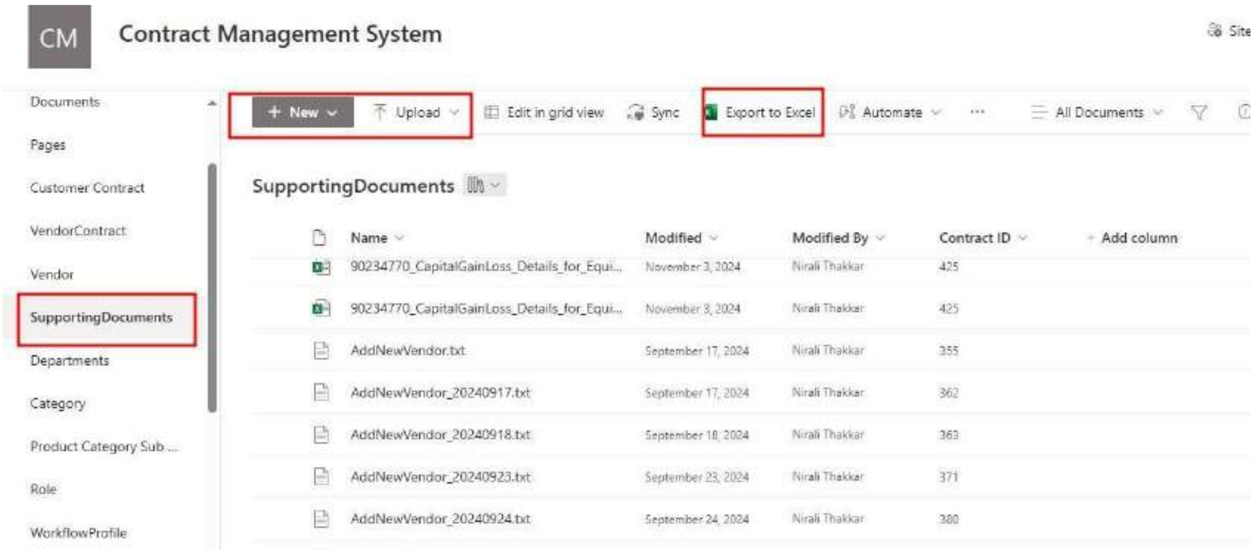
- Open the **Users** list in SharePoint.



- Click **New Item**.
- Fill in the required details:
  1. **User's Name**
  2. **Role** (e.g., Admin, Viewer, Editor)
  3. **Email Address**
  4. **Assigned Department**
- Click **Save** to add the user to the system.

3. Updating Bulk Old Contracts

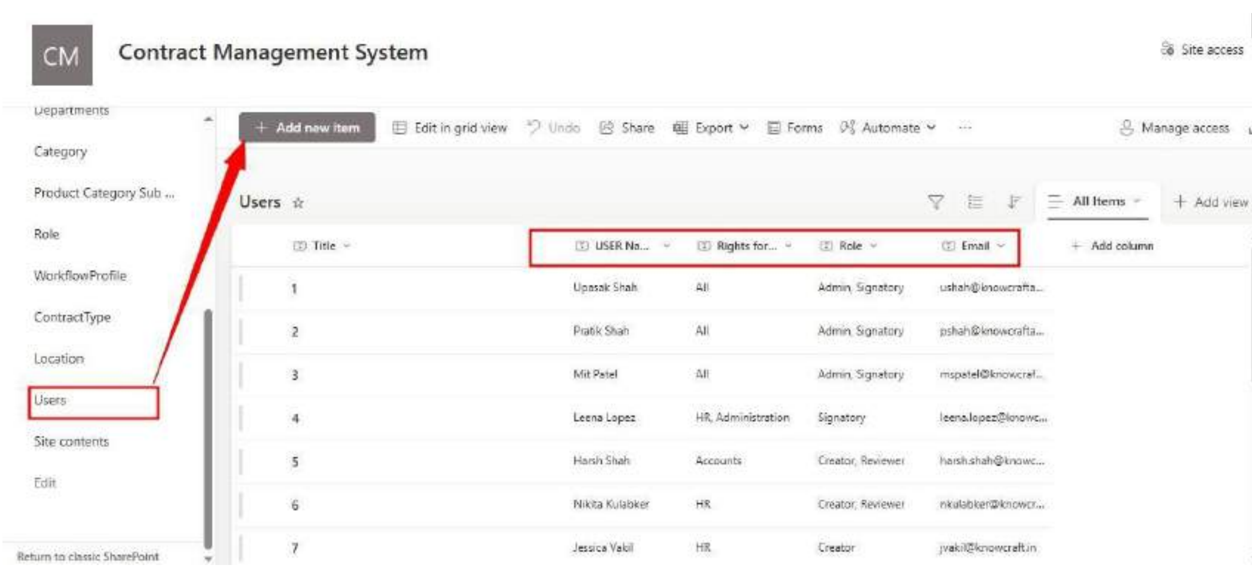
To update multiple contracts at once in the SharePoint backend:



- Export the existing contract records from SharePoint into an **Excel file**.
- Make necessary modifications in the Excel file while ensuring **data consistency**.
- Use the **Quick Edit** feature in SharePoint to make changes directly in the list, OR re-upload the modified file back into SharePoint.
- Validate changes to ensure all updates have been successfully applied.

4. Mapping Users to Departments

To assign users to their respective departments in the SharePoint backend:



- Open the **User Roles & Departments** list in SharePoint.
- Locate the user entry.

- Select the appropriate department from the **dropdown list**.
- Click **Save** to confirm the changes.
- The user will now be correctly mapped to their department.

Note:

The system dynamically fetches sub-departments based on the selected department and relevant contract sub-types based on the selected contract type. If the admin wants to update, add, or modify departments, sub-departments, contract types, or contract sub-types, they can do so through the 'Site Content' settings in the SharePoint backend. Any updates made by the admin in SharePoint will automatically reflect in the dropdown lists on the system interface, ensuring flexibility to meet future requirements.

Support:

If you need any assistance, please reach out to us at info@jmsadvisory.in, and we will get back to you within a 24 working hours.