**A blue and black logo

Description automatically generatedCustomer Critical Delivery Path and Standard Operating Procedure**

Contract Intelligence Dashboard

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**I. Critical Delivery Path:**

1. **Client Engagement and Requirements Gathering:**
   * Meet with the client to understand their contract management needs and goals.
   * Gather requirements for metadata extraction, dashboard insights, and alert preferences.
2. **Contract Gathering and Centralization:**
   * If the client already has a centralized repository like Sharepoint, assess its suitability for storing contracts.
   * If needed, assist the client in centralizing their contracts into a single repository, whether it's Sharepoint or another platform.
   * Utilize methods like SFTP, RPA, etc., if necessary, to transfer contracts securely into the chosen repository.
3. **Data Model Creation:**
   * Develop a data model or schema in Sharepoint to maintain the properties of each metadata point for efficient extraction and management.
   * Ensure the data model aligns with the client's contract management requirements and allows for scalability and flexibility.
4. **LLM Model Implementation:**
   * Implement the LLM (Legal Language Model) to extract the standard set of metadata points from the contracts stored in the Sharepoint repository.
   * Fine-tune the LLM model to ensure accurate extraction of relevant metadata.
5. **PowerBI Dashboard Configuration:**
   * Design and configure a custom PowerBI dashboard tailored to the client's contract management needs.
   * Integrate the extracted metadata from Sharepoint into the PowerBI dashboard for visualization and analysis.
6. **Dashboard Integration and Alerts Setup:**
   * Connect the Sharepoint site to the PowerBI dashboard to enable real-time data synchronization.
   * Set up standard alerts within the dashboard to notify the client of new insights, important contract events, or deviations from predefined metrics.
7. **Quality Assurance (QA) Testing:**
   * Conduct thorough QA testing on the contract data extraction process, ensuring accuracy, completeness, and consistency.
   * Test the PowerBI dashboard functionality, including data visualization, drill-down capabilities, and alert triggers.
8. **Product Testing and Finalization:**
   * Run comprehensive tests on the integrated solution, including the LLM model, Sharepoint integration, and PowerBI dashboard.
   * Address any issues or discrepancies identified during testing.
   * Finalize the product and ensure it meets the client's expectations and requirements.
9. **Delivery and Client Training:**
   * Deliver the finalized solution to the client, ensuring seamless deployment within their environment.
   * Provide training and support to the client's team on how to use and maintain the solution effectively.
   * Ensure ongoing communication and support for any post-deployment issues or enhancements.
10. **Continuous Improvement and Maintenance:**

* Implement feedback mechanisms to gather insights from the client and iterate on the solution for continuous improvement.
* Offer maintenance services to ensure the solution remains up-to-date, efficient, and aligned with evolving business needs.

**II. SOP for contract transfer:**

**Step 1 - Creating a Secured SharePoint Site:**

1. **Define Site Structure:**
   * Determine the structure of the SharePoint site based on the client's contract management requirements.
   * Identify document libraries, folders, and metadata properties needed to organize and manage contracts effectively.
2. **Access SharePoint Admin Center:**
   * Log in to the SharePoint Admin Center using administrator credentials.
   * Navigate to the section for creating new sites or managing existing ones.
3. **Create New Site:**
   * Click on "Create site" or "Add a site" option.
   * Choose the appropriate site template based on the project requirements (e.g., Document Center, Team Site).
   * Enter a name for the site and configure other settings such as permissions and storage quota.
4. **Configure Site Settings:**
   * Access the newly created site and navigate to the site settings.
   * Configure security settings, including user permissions and access levels, to ensure data protection.
   * Enable features like versioning and auditing for document management and compliance purposes.
5. **Set Up Information Architecture:**
   * Create document libraries and folders as per the predefined site structure.
   * Define metadata columns to capture relevant information about each contract (e.g., contract type, expiration date).
6. **Enable Secure Access:**
   * Utilize SharePoint's security features such as access controls, encryption, and multi-factor authentication to secure access to the site.
   * Configure external sharing settings if the client needs to collaborate with external parties while maintaining security.
7. **Test and Verify:**
   * Conduct thorough testing to ensure that the SharePoint site functions as expected.
   * Verify that security measures are correctly implemented and that users can access and manage contracts securely.

**Step 2 - Moving Contracts Using SFTP or RPA:**

1. **Client Engagement:**
   * Coordinate with the client's IT team to gather information about the location and format of the contracts to be transferred.
   * Determine the preferred method for transferring contracts (e.g., SFTP, RPA) based on security requirements and technical feasibility.
2. **Prepare Transfer Environment:**
   * Set up the necessary infrastructure for SFTP or RPA, including servers, credentials, and encryption protocols.
   * Install and configure any required software or automation tools for the transfer process.
3. **Set up Infrastructure for SFTP or RPA:**
   * Determine the infrastructure requirements based on the chosen transfer method (SFTP or RPA).
   * For SFTP:
     + Provision a server or virtual machine (VM) capable of running an SFTP server software.
     + Ensure the server meets security standards and is adequately protected with firewalls and intrusion detection systems.
   * For RPA:
     + Deploy RPA software on a server or VM with sufficient computing resources to handle automation tasks.
     + Ensure the server environment is compatible with the RPA platform and supports integration with external systems.
   * Configure network settings to allow communication between the transfer environment and client systems.
4. **Install and Configure Required Software or Tools:**
   * For SFTP:
     + Install and configure an SFTP server software such as OpenSSH or FileZilla Server on the designated server.
     + Configure user accounts and permissions to restrict access to authorized users.
   * For RPA:
     + Install the selected RPA software (e.g., UiPath, Automation Anywhere) on the server or VM.
     + Set up automation workflows or bots to handle the transfer process according to predefined rules and conditions.
5. **Establish Connection:**
   * Obtain the necessary credentials and connection details from the client for accessing their systems or repositories.
   * Configure the SFTP client or RPA software to establish a secure connection to the client's environment.
6. **Obtain Credentials and Connection Details:**
   * Collaborate with the client's IT team to obtain necessary credentials (e.g., username, password, SSH keys) and connection details (e.g., host IP address, port number) for accessing their systems or repositories.
   * Ensure that the provided credentials have the required permissions to access and transfer contract files securely.
7. **Configure SFTP Client or RPA Software:**
   * For SFTP:
     + Use an SFTP client application such as WinSCP, Cyberduck, or PuTTY to establish a secure connection to the client's SFTP server.
     + Enter the provided connection details (host, port, username, password/SSH key) into the SFTP client configuration.
     + Test the connection to verify connectivity and authentication.
   * For RPA:
     + Configure the RPA software to interact with the client's systems or repositories using the provided credentials.
     + Set up connection parameters within the RPA platform, specifying the client's host address, authentication method, and any additional security settings.
     + Validate the connection settings to ensure successful communication between the RPA software and client environment.
8. **Transfer Contracts:**
   * Use the established connection to transfer contracts from the client's locations to the designated folders in the secured SharePoint site.
   * Ensure that the transfer process maintains data integrity and security by encrypting files during transit.
9. **Use Established Connection for Transfer:**
   * Once the connection is established and validated, proceed with transferring contracts from the client's locations to the designated folders in the secured SharePoint site.
   * Navigate to the source directory or repository containing the contract files using the SFTP client or RPA software.
   * Select the desired files or folders for transfer and initiate the transfer process.
10. **Ensure Data Integrity and Security:**
    * Enable encryption options (e.g., SSH encryption for SFTP, SSL/TLS encryption for RPA) to secure data during transit between the client's environment and the SharePoint site.
    * Monitor the transfer process to ensure that all files are transferred successfully without corruption or loss.
    * Implement error handling mechanisms to address any transfer failures or interruptions promptly.
11. **Verify Transfer:**
    * After the transfer is complete, verify that all contracts have been successfully migrated to the SharePoint site.
    * Compare the transferred contracts with the original source to confirm accuracy and completeness.
12. **Automate Transfer (Optional):**
    * If using RPA, consider automating the transfer process to streamline future migrations and minimize manual intervention.
    * Implement error handling mechanisms and logging to track the status of transfers and troubleshoot any issues.
13. **Document Process:**
    * Document the steps involved in the transfer process, including configurations, credentials, and troubleshooting procedures.
    * Create user guides or training materials for team members involved in future transfers.
14. **Finalize Security Measures:**
    * Ensure that the transferred contracts are secured within the SharePoint site by applying appropriate permissions and access controls.
    * Regularly monitor and audit access to the contracts to detect any unauthorized activities.

**III. process automation**

1. **Creating a Secured SharePoint Site:**
   * **Site Creation:** The process of creating a SharePoint site can be automated using SharePoint APIs or PowerShell scripts. These scripts can provision a new site based on predefined templates and configurations, reducing the need for manual intervention.
   * **Configuration Settings:** Settings such as security configurations, document library creation, and metadata column creation can also be automated using PowerShell scripts or SharePoint workflows. This ensures consistency and accuracy across multiple sites.
2. **Moving Contracts Using SFTP or RPA:**
   * **File Transfer:** Both SFTP and RPA processes can be automated to transfer files securely from the client's location to the SharePoint site. For SFTP, automated scripts or scheduled tasks can be set up to connect to the client's SFTP server, retrieve files, and upload them to the SharePoint site. Similarly, RPA bots can be programmed to perform the file transfer process, mimicking human interactions with the client's systems.
   * **Data Validation and Error Handling:** Automation can also be implemented to validate the transferred data and handle any errors or discrepancies automatically. This can include checking file integrity, verifying metadata, and logging any transfer errors for further analysis.
   * **Notification and Reporting:** Automated notifications can be configured to alert stakeholders about the status of file transfers, completion of tasks, or any issues encountered during the process. Additionally, automated reporting tools can generate reports on file transfer activities, including transfer times, success rates, and error logs.