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Managing Contract Spending From Contract Workspaces

SAP Ariba Contracts
SAP Strategic Sourcing Suite
SAP Ariba Buying
SAP Ariba Buying and Invoicing
SAP Ariba Invoice Management

THE BEST RUN

Content

Managing Contract Spending from Contract Workspaces

This guide is for SAP Ariba users of SAP Ariba Contracts integrated with SAP Ariba Procurement solutions, and describes how to use SAP Ariba Contracts with the contract compliance feature provided by the buying solution from SAP Ariba and how to aggregate spend data in contract workspaces.

This guide applies to:

- SAP Ariba Strategic Sourcing Suite
- SAP Ariba Contracts

Related Guides:

Contract authoring guide

Managing Projects, Teams, Documents, and Tasks

Enhanced Contract Authoring

Contract Administration Guide

Topics about Integrating Ariba Contract Management with Contract Compliance

About Integrating SAP Ariba Contracts with Contract Compliance

If your SAP Ariba Contracts solution is integrated with SAP Ariba Procurement solutions, you can create a contract terms link document to work with compliance contract requests (and compliance contracts).

If you do not want to push pricing terms or other contract data from a contract workspace to a compliance contract request, you do not need to use contract terms link documents.

Contract Terms Links (Documents)

To integrate SAP Ariba Contracts with an SAP Ariba Procurement solutions compliance contract request (and compliance contract), you use a Contact Terms link document. A **contract terms link document**, or **Contract Terms link** links an SAP Ariba Contracts workspace with a compliance contract request (or compliance contract).

A contract terms link is located in the **Documents** area of a workspace, however, it is not a document that you can edit or view. Instead of editing or viewing a contract terms link, you:

- Create a contract terms link, which creates an associated compliance contract request in the Ariba procurement or invoicing solution.
- Open a contract terms link, which transfers you to the associated compliance contract request (or compliance contract).

contract terms links are indicated by the following icon:

When you first create a contract terms link, it is named **Untitled contract terms**.

You can have only one contract terms link per contract workspace. A contract terms link also maintains data shared between the workspace and the compliance contract request (or contract), such as the supplier.

For more information about contract terms links, see Creating a contract terms Link Document [page 6].

> ⓘ Note
>
> contract terms links are not supported in sales or internal contract workspaces.

Pricing Terms

Compliance contracts contain **pricing terms**, which specify the items acquired by the contract, including pricing information. You can specify pricing terms by:

- Entering items using the **compliance contract user interface**. If your procurement solution has a catalog loaded for the supplier, you can select items from the catalog.
- Importing entries from a **line items document** in the SAP Ariba Contracts workspace. If your workspace contains a line items document, the contents are automatically copied to the compliance contract when you create a contract terms link document (which creates the compliance contract). If your site is configured with item material master data integration, users can copy items from material master data to a line items document.
  Line items documents are disabled by default. For information about enabling line items documents, see Contract Line Items Documents (CLIDs).
- Importing entries from a **pricing terms Excel document** in the SAP Ariba Contracts workspace. The file must contain a specific set of columns and tabs; you can create a template with the required format by exporting an existing compliance contract to an Excel file.

Related Information

Creating a contract terms Link Document [page 6]
Navigating from a Contract Workspace to Contract Compliance [page 8]
Navigating from Contract Compliance to a Contract Workspace [page 9]
Creating a contract terms Excel Document from Contract Compliance [page 12]
Manually Loading a contract terms Excel Document to a Contract Workspace [page 12]
Using an Existing Project Document as a contract terms Excel Document [page 13]
Synchronizing Data from Contract Compliance to the contract terms Excel Document [page 13]
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Modifying Published contract terms [page 14]
Replacing a contract terms Excel Document [page 14]
Exporting a contract terms Excel File to a Third Party System [page 15]
Deleting contract terms Link Documents [page 9]

About Shared Data in Contract Compliance

When you create or open a compliance contract request from an SAP Ariba Contracts workspace, the following project fields are propagated from the workspace to contract compliance:

- **Contract ID**
- **Supplier** This is used for the **Vendor** field in contract compliance.
- **Term Type** This is used for the **Evergreen** field in contract compliance. If **Term Type** is **Perpetual**, **Evergreen** is **Yes**. Otherwise, **Evergreen** is **No**.
- **Hierarchical Type**
- **Effective Date**
- **Expiration Date**

About Contract Hierarchy Requirements for Contract Terms

You cannot change or create contract hierarchies in contract workspaces (master agreements and subagreements) after you create and activate a contract terms link in a workspace. This restriction ensures that contract compliance properly manages accumulators, discounts, and audit histories.

You cannot click and activate a contract terms link in a subagreement workspace before activating the contract terms link in the corresponding master agreement workspace. (If you want to activate a contract terms link in a subagreement workspace, the contract terms link for the master agreement must already exist in contract compliance.)

Linking and Navigating to and from Contract Compliance

Linking a Contract Workspace to Contract Compliance (Creating a Contract Terms Link)

Context

To link an SAP Ariba Contracts workspace to contract compliance, you create a contract terms link (document).

Procedure

1. In a contract workspace, navigate to the **Documents** tab and choose **Actions** > **Create** > **contract terms**.

   You can create only one contract terms link in a contract workspace. After you publish a contract terms link, you cannot delete it.

   > **Note**
   >
   > An error can occur when you attempt to use Microsoft Excel export during the integration of SAP Ariba Contracts and contract compliance and you are using a locale that is not supported in contract compliance. To correct the error and use Microsoft Excel export during the integration, change the user locale in the SAP Ariba Contracts environment to a locale that is supported in the contract compliance environment. This condition is caused by the following non-supported locales in contract compliance: Brazilian Portuguese, Simplified Chinese, Traditional Chinese, and Russian.

   There might be a contract terms link in your procurement contract workspace by default, loaded from the workspace template. In that case, click the contract terms link icon ( ) to navigate to the compliance contract request.

   > **Note**
   >
   > If you want to use approval tasks with contract terms, SAP Ariba recommends that you create them in the compliance contract request. If a contract terms document in a contract workspace has approval tasks associated with it and all approvals complete, the contract terms document must be manually published. Click the contract terms link to access contract compliance and submit the contract request.

2. Enter basic information for the contract terms.

   You must specify the following information:

   - **Supplier**
   - **Expiration Date** (if the contract term type is not Auto Renewal)
     The **Related ID** is an optional field you can use to record an external identifier (such as an ID for an ERP system); it is not the name of the contract workspace.
     Verify that the supplier name is correct. You cannot change the supplier after you create the compliance contract request.

3. Click **Save**. A compliance contract request is created and you are transferred to the contract compliance interface in one of the SAP Ariba Procurement solutions. In contract compliance, add details about the contract, requirements and definitions, limits for the contract terms, pricing terms, and contract milestones.

   If your contract workspace contains a line items document, the pricing terms in the compliance contract request are pre-populated with items from the line items document.

4. On the **Summary** page in contract compliance, click **Save**. The system returns you to the contract workspace, where you can continue work in the workspace.

   > **Note**
   >
   > If you modify the supplier information in the contract workspace, then you must manally synchronize the changes in the linked compliance contract.

Results

You will see the new contract terms link below the **Documents** tab with the name **Untitled contract terms** and the following icon:

You can change the name by choosing **Action** > **Edit Attributes** and editing the title.

Next Steps

When you are ready to publish the contract workspace, you can then publish the contract terms link. Publishing the contract terms link also publishes the contract workspace that contains the terms. Similarly, publishing a contract workspace publishes the contract terms link. To publish the contract terms link, select the document name, then select **Action** > **Publish**.

When you publish the contract terms link in SAP Ariba Contracts , you return to contract compliance, and can manage the approval flow for the contract terms, or click **Submit** to complete the terms and submit the contract request in contract compliance for processing. Documents from the contract workspace, such as the Main Agreement and Contract Addendum, are listed as links in a **Documents** tab in the compliance contract request.

Navigating from a Contract Workspace to Contract Compliance

You can easily navigate from a contract workspace to the corresponding compliance contract request or compliance contract.

Procedure

1. Navigate to the **Document** tab in the contract workspace.
2. Click the contract terms link icon:

   

Navigating from Contract Compliance to a Contract Workspace

You can easily navigate from a compliance contract request to SAP Ariba Contracts.

Procedure

Use one of the following methods to navigate from a contract compliance request or compliance contract to the corresponding SAP Ariba Contracts workspace:

- If you are working with an unsubmitted, linked compliance contract request, click **Save**.
- If you are working with a submitted compliance contract request or compliance contract, click the **Contract Workspace** button.

Deleting Contract Terms Links

Deleting a contract terms link also deletes the corresponding compliance contract request.

Context

You cannot delete contract terms links that have been published, or were inherited from a template. The only contract terms links you can delete are those that are unpublished and were not inherited from the project's template.

Procedure

Open the contract workspace and navigate to the **Documents**. Click the name of the contract terms link and choose **Delete**.

Results

The status of the contract terms link initially changes to Pending Delete. After the corresponding contract request is deleted in contract compliance, SAP Ariba removes the contract terms link from the contract workspace.

Using Line Items Documents with Contract Compliance

Prerequisites

Your SAP Ariba Contracts solution must be integrated with one or more of the SAP Ariba Procurement solutions. The contract workspace must have a contract terms link that associates the workspace with a compliance contract request.

Context

You can export the items in a contract line items document to a compliance contract request to provide initial data for the request. The items in the line items document overwrite the existing **Pricing Terms** in the compliance contract request. Fields and terms for the items from the line items document are propagated to the **Description** areas for the items in the compliance contract request.

> ⚠ Limitations
>
> A contract workspace can contain a line items document or a contract terms Excel document, but not both document types.
>
> A contract line items document used with a compliance contract request cannot have more than 2000 line items.

Procedure

Navigate to the **Documents** area in your contract workspace. Click the contract terms link ( ) and select **Action** › **Import from Line Items**.
SAP Ariba updates the associated contract request with data from the line items document. SAP Ariba opens the compliance contract and transfers you to the compliance contract work area. The compliance contract request will contain the items from the line items document in the **Pricing Terms** with values in the **Description** area for each item. You can modify the items to add values in additional areas, such as **Limits**, **Release Limits**, **Pricing and Discounts**, and **Accounting**.

Using Contract Terms Excel Documents with Contract Compliance

Adding Contract Terms Excel Documents [page 11]

Adding Contract Terms Excel Documents

A contract terms Excel file, sometimes referred to as a pricing terms Excel file, is a Microsoft Excel document that contains data about the contract, including pricing terms and access control.

You can use a contract terms Excel document to synchronize pricing terms and other contract data between your contract workspace and the compliance contract request. The pricing terms include the header and line-item data that SAP Ariba will use to create the contract request.

> ⓘ Note
>
> A contract workspace can contain either a contract terms Excel file or a line items document, but not both file types.

A contract terms Excel Document can be added to a contract workspace through automatic import from a sourcing event award, exporting terms from a compliance contract request, or manually loading a Microsoft Excel file.

- Automatic import from a sourcing event award.
  If your site has both SAP Ariba Contracts and SAP Ariba Sourcing installed, you can create a new contract workspace directly from the sourcing event award. When you create a contract workspace from an awarded sourcing event, the pricing terms and other contract information can be carried over in a spreadsheet on the **Documents** tab in the contract workspace. These pricing terms are then used in the compliance contract request you create from the contract workspace.
- Export terms from a compliance contract request.
  After you create a link between a contract workspace and a compliance contract request, you can export the terms from the compliance contract request to the contract workspace. For more information, see Synchronizing Data From Contract Compliance to the Contract Terms Excel Document [page 13].
- Manually loading a Microsoft Excel file
  You can also create a Contract Terms Excel document manually using Microsoft Excel. The file must contain a specific set of columns and tabs. You can create a template with the required format by exporting any contract to Microsoft Excel. For more information, see Manually Loading a Contract Terms Excel Document to a Contract Workspace [page 12].

Creating a Contract Terms Excel Document From Contract Compliance

You can export contract terms (pricing terms, access control, and other information) from a compliance contract request to a contract workspace. This creates a contract terms Excel document in the contract workspace.

Procedure

1. Create a contract terms link document to link a contract workspace with a compliance contract request, as described in Linking a Contract Workspace to Contract Compliance (Creating a Contract Terms Link) [page 6].
2. Specify pricing terms and other contract term information in contract compliance.
3. Click **Save** to return to the associated contract workspace.
4. Click the contract terms link file name in the **Documents** area. Choose **Action** > **Export to Excel**. SAP Ariba creates a contract terms Excel document in the **Documents** area with the name **Terms File**.

Manually Loading a Contract Terms Excel Document to a Contract Workspace

Procedure

1. Create a Microsoft Excel template for the terms by opening or downloading a contract terms Excel document in another contract workspace. Save a copy of the file to use as the Excel template.
2. Open the Excel template. Delete and modify the data as needed.

   > ⓘ Note
   >
   > Do not modify the format. Do not remove columns or tabs. Do not change column titles. The format must match the compliance contract format. For more information about the data and format of Excel contract terms files, see Spreadsheet Import Notes.

   > ⓘ Note
   >
   > When a contract terms Excel document has an effective or expiration date and the contract workspace does not have these dates, the contract workspace will use the dates from the Excel file. If the contract workspace already has dates, those dates take precedence over any dates specified in the contract terms Excel document. To synchronize the date values in the contract terms Excel document with the contract workspace values, click on the contract terms Excel document name and choose **Actions** > **Sync with Contract Workspace**.
3. Save the changes.
4. Create a copy of the modified Excel file by selecting **File** > **Save As** in the **.xls** format.

   This step ensures that there are no compatibility issues while uploading the file to the contract workspace.

5. Load the copy of the modified Excel file to the contract workspace as described in Loading a Document from Another Project to Your Project.

Using an Existing Project Document as a Contract Terms Excel Document

Procedure

1. Click on the document name. The document must be a Microsoft Excel file and meet the file format requirements and guidelines described in Replacing a contract terms Excel Document [page 14]. Choose **Actions** > **Edit Attributes**.
2. In the **Use As** pull-down menu, choose **Contract Content**.
3. Click **Save**.
4. If you have already created an associated compliance contract request, use the procedure described in Synchronizing Data from Contract Compliance to the contract terms Excel Document [page 13] to synchronize the new contract terms Excel document in your contract workspace with the contract compliance request.

Synchronizing Data From Contract Compliance to the Contract Terms Excel Document

Procedure

Open the contract workspace and navigate to the **Documents** area. Click the name of the contract terms link and choose **Actions** > **Export to Excel**.

The terms in the compliance contract request are loaded to the contract terms Excel document in the contract workspace.

Synchronizing Data From the Contract Terms Excel Document to Contract Compliance

Procedure

Open the contract workspace and navigate to the **Documents**. Click the name of the contract terms link and choose **Actions** > **Import from Excel**.

The entries in the contract workspace contract terms Excel document overwrite the terms in the compliance contract request. The compliance contract request is opened so you can review the changes.

Modifying Published Contract Terms

Procedure

1. Amend the contract workspace that contains the contract terms link document and select **Amendment** or **Renewal** for the amendement type. The document goes into **Draft** status.

   For more information about the standard fields in the contract that you can modify with a given amendment type, see Editable fields with different amendment types.
2. Update the contract terms link and select **Publish** to publish the terms and the amended contract workspace. This triggers a change in the terms in the compliance contract, and a new version is created of the corresponding compliance contract with the status **Open**. Access contract compliance and you can click **Submit** to put the modified terms into effect.

Replacing a Contract Terms Excel Document

Procedure

1. Create a Microsoft Excel template for the terms by opening or downloading a contract terms Excel file from a contract workspace. Save a copy of the file to use as the Excel template.

   You can also create a Microsoft Excel template for the terms by exporting a compliance contract request or compliance contract to Excel. For more information, see How to export contracts.
2. Edit the file as described in Manually Loading a contract terms Excel Document to a Contract Workspace [page 12].
3. In the contract workspace, navigate to the Documents area. Select the name of the contract terms Excel document and choose **Replace Document**.
4. Browse for the terms file that you edited.
5. Choose **Replace document by the uploaded file** and click **OK**.
6. Be sure that the **Use As** field has the value **Contract Content**.
7. Click **Save**.
8. If you have already created an associated compliance contract request, use the procedure described in Synchronizing Data from Contract Compliance to the contract terms Excel Document [page 13] to synchronize the new contract terms Excel document in your contract workspace with the contract compliance request.

Exporting a Contract Terms Excel File to a Third Party System

If your system has the **Export contract terms** web service configured and enabled with a third-party system, you can trigger the web service to send the contract terms Excel document to the third-party system.

Procedure

1. Navigate to the **Documents** tab.
2. Click the contract terms Excel document name and choose **View Details**.
3. On the details page, choose **Action** > **Export** > **External System** to export the contract terms Excel document using the **Export contract terms** web service.

Restriction

Customization is not supported for Global contracts. Custom field values from a Global contract are transferred to the requisition only when both the contract and requisition are created within the same child site. If the requisition is created in a different child site, the custom field value from the contract will not be populated.

Aggregating Spend Data in Contract Workspaces

If your SAP Ariba Contracts solution is integrated with SAP Ariba Procurement solutions, you can configure spend data aggregation in contract workspaces.

Aggregating spend data in contract workspaces and the associated functionalities are enabled by site configuration options set by SAP Ariba Customer Support representatives. The following functionalities can be enabled:

- Creating procurement contract workspaces and compliance contracts that support spend data aggregation
- Associating ad hoc (non-contract) spending with contract workspaces
- Linking from one contract workspace to contract documents in another workspace

If the spend data aggregation functionality is enabled, you can create a new procurement contract workspace and set it up for spend data aggregation by choosing Yes in the **Combined Spend** field. The procurement contract workspace will now provide the following features:

- An overall amount can be approved for procurement spending, which can be used for various procurement requirements without the need for individual approvals for each.
- Release approvers created in the contract workspace in SAP Ariba Contracts will be added to the approval flows of requisitions created in SAP Ariba Procurement solutions.
- Accrued spend information, as well as receipt and invoice details, from SAP Ariba Procurement solutions, will be available to release approvers and project owners in SAP Ariba Contracts.

Associating Ad Hoc Spending with Contract Workspaces

The ad hoc spend functionality permits authorized procurement users to create ad hoc requisitions, which can be associated with a contract workspace during requisition and non-PO invoice creation. This allows you to integrate your SAP Ariba Contracts solution with SAP Ariba Procurement solutions without the need for a compliance contract, and track non-contract procurement spending as part of a project.

Linking to Contract Documents in Another Workspace

This functionality introduces linked contract documents, which allow you to reuse documents available in a procurement contract workspace with the spend data aggregation functionality enabled, by linking to them from within another procurement contract workspace. This allows users to leverage existing documents, where possible, and reduce redundancies. Linking can be done from regular contract workspaces or contract spend workspaces. Regular contract workspaces are converted to the combined spend type when they are linked. Linking can be bidirectional, provided both contract workspaces are of the combined spend type. In one direction, the link will be from the second contract workspace to documents available only in the first contract workspace, while in the other direction, it will be from the first contract workspace to documents available only in the second contract workspace.

Creating Approval Tasks on Documents or Folders

If the spend data aggregation functionality is enabled, you can create approval tasks only on the entire workspace. You can enable the creation of approval tasks on documents or folders. If this is enabled, the following field appears in the approval task creation/edit page, under the Advanced Task Details section:

- **Update approved amount for parent workspace** Select this to ensure that when the approval task for the document is approved, the approved amount is used to update the approved amount on the parent contract workspace.

Related Information

About Data Shared with SAP Ariba Procurement solutions Solutions [page 17]
About the Spend Tab [page 18]
About Associating Ad Hoc Spending with Contract Workspaces [page 19]
About Linked Contract Documents [page 20]

About Data Shared with SAP Ariba Procurement solutions Solutions

When you create a compliance contract request from a procurement contract workspace with the spend data aggregation functionality enabled, the following project fields are propagated from the workspace to the contract compliance:

- **Combined Spend** This indicates that the procurement contract workspace supports spend data aggregation and is used for the **Is Combined Spend** field in contract compliance.
- **Release Approvers** This is the release approver for this contract workspace used for the **Release Approvers** field in contract compliance.
- **Release Creators** This is the release creator for this contract workspace used to set the **Restrict Release Access** > **Users by Name** field in contract compliance.

When you create a non-contract requisition or invoice in SAP Ariba Procurement solutions with the ad hoc spend functionalities enabled, and select a contract workspace to associate the spend with, the following project fields are propagated from the workspace to the SAP Ariba Procurement solutions:

- **Allow Ad hoc Spend** This indicates that the procurement contract workspace supports ad hoc spending and is used to show the contract workspace ID for this workspace in the **Contract Workspace ID** field in the approvable creation page.
- **Ad hoc Spend Users** This is the list of users authorized to do ad hoc spending and is used to determine which users will see the fields corresponding to ad hoc spending in the approvable creation page.

About the Spend Tab

The Contract Workspace (Procurement) will have a new **Spend** tab when the combined spend functionality is enabled. This tab displays the transaction information from SAP Ariba Procurement solutions. It has four sections: **Summary**, **Transactions against Contract**, **Ad hoc Transactions**, and **Linked Contracts**. Initially, only **Summary** is displayed, and the other sections are displayed only when the respective functionality is enabled.

The **Summary** section displays summary spend-related information in the following fields:

- **Approved** The total approved amount in the Contract Workspace.
- **Available** The available amount in the Contract Workspace.
- **Contract Max** The maximum contract amount set in the contract in SAP Ariba Procurement solutions.
- **Spend** The total spend against this contract workspace, including spend against contracts, and ad hoc spend. Click the **Details** link next to this field to display the following spend details fields:
    - **Contract Spend**
        - **Ordered Amount** The amount already ordered against the contract.
        - **Received Amount** The amount received against the contract orders.
        - **Invoiced Amount** The amount invoiced against contract orders.
    - **Ad Hoc Spend**
        - **Ordered Amount** The amount already ordered against the contract workspace.
        - **Invoiced Amount** The amount invoiced against the contract workspace.
- **Total Spend** The total spend for this contract workspace, including spend against contracts, ad hoc spend, and spend against linked contract workspaces. Click the **Details** link next to this field to display the following spend details fields:
    - **Contract Spend** The total spend against the combined spend contract for this contract workspace.
    - **Ad Hoc Spend** The total ad hoc spend against this contract workspace.
    - **Linked Contract Spend** The total contracted spend against contract workspaces linked to this contract workspace.
    - **Linked Ad Hoc Spend** The total ad hoc spend against contract workspaces linked to this contract workspace.

> ⓘ Note
>
> The Available Amount is calculated using the following formula: Available Amount = Approved Amount – MaxAmount.

The **Transactions against Contract** section displays the transaction details such as **Orders**, **Receipts**, and **Invoices** created on the SAP Ariba Procurement solutions contract corresponding to the contract workspace. Each table displays a list of the corresponding transactions subject to a limit of 100 rows.

The **Ad hoc Transactions** section displays details of ad hoc transactions in SAP Ariba Procurement solutions that were associated with the contract workspace directly when they were created. This section shows the ad hoc orders and non-PO invoices created in the SAP Ariba Procurement solutions and associated with this contract workspace.

The **Linked Contracts** section displays linked contract workspaces, which have links to documents in this contract workspace. This section also has the **Total Approved Amount** field, which shows the cumulative approved amount for all linked contract workspaces, and the **Total Spend Amount** field, which shows the total spend for all linked contract workspaces. The linked contracts table shows the list of linked contract workspaces, along with the spend details for each.

Enabling the Spend Tab For all Procurement Contract Workspaces

The **Spend** tab can be enabled for all procurement contract workspaces, irrespective of whether they are of the combined spend type or not. This is useful when you need to track spending in scenarios where the workspace is not of the combined spend type.

If this functionality is enabled, the Spend tab in procurement contract workspaces that are not of the combined spend type displays the following:

- **Contract Max**, **Spend**, and **Total Spend** fields in the **Summary** section.
- Transaction details in the **Transactions against Contracts** section.

The **Spend** and **Total Spend** fields expand to show spending details for contract spend. If the ad hoc spend functionality is enabled, the ad hoc spend transaction details are displayed in the **Ad hoc Transactions** section along with the other fields. If the linked contract document functionality is enabled, the **Linked Contracts** section with spending details from linked contracts will be displayed along with the other fields. If both the ad hoc spend and the linked contract document functionalities are enabled, the **Ad hoc Transactions** and **Linked Contracts** sections are displayed in addition to the other fields.

About Associating Ad Hoc Spending with Contract Workspaces

The Ad hoc spend functionality makes use of contract workspace ID information to make a list of contract workspaces available for selection. The spend data from ad hoc non-contract procurement spending is also rolled up to the associated contract workspace if contract terms are added during the creation of the contract workspace. Procurement line items that have the contract workspace ID set (that is, an ad hoc item for a contract workspace), will not be auto-matched to a contract line item. So, if that item is in a contract with the same supplier, the pricing terms will not be applied to it as that item is tagged to the contract workspace already. In the same way, users cannot set the contract workspace ID for an item matched to a contract line item. If an ad hoc user is not set, any user with the appropriate authorization can create a non-contract requisition or invoice against and associate it with a contract workspace.

If this functionality is enabled along with the aggregating spend data in contract workspaces functionality, the approvable creation page will have the new **Contract Workspace ID** field, along with the **Select** link, which can be used to select the contract workspace ID of the contract workspace to which the approvable line item is to be associated. This field is available in the following pages:

- In the requisition line item creation pages, for both catalog and non-catalog line items, the **Contract Workspace ID** field and the **Select** link are shown along with other line item details like the **Price** and **Amount**.
- In the invoice request creation page for non-PO invoices, the **Contract Workspace ID** field and the **Select** link are shown along with other line item details and can be specified. For PO-invoices, this field cannot be set and the value is set from the corresponding purchase order.

> ⓘ Note
>
> The **Contract Workspace ID** field cannot be set for contract invoices, as these invoices are already associated with contracts.

About Linked Contract Documents

Linking to documents in another contract workspace is possible only when the current Contract Workspace (Procurement) is not published. The document search filter has been enhanced to allow users to search for documents to link to. The linked documents are available for use in the linked contract workspace as long as they remain unchanged in the source contract workspace. Any changes to the original versions in the source contract workspace will not automatically update the linked documents in the linked contract workspace. Users will be notified about such changes and will need to link to the changed documents.

If the linked contract documents functionality is enabled along with the Aggregating spend data in contract workspaces feature, the Contract Workspace (Procurement) will have a new **Link Contract Document** option in the **Actions** menu on the **Documents** tab to link documents.

Clicking the **Link Contract Document** option displays a search page to search for documents to link to. Only published documents are displayed. A document cannot be linked to itself. A new **Document Type** column is added to show the type of the document (the type can be main agreement, contract addendum, or a regular document).

When creating a subproject, if the user chooses to copy documents from parent project, when the parent contract workspace contains linked documents, the system will not copy the linked document from the parent contract workspace to the subproject.

The search page filters out the following types documents:

- Main Agreement documents, if the current contract workspace already has a Main Agreement.
- Documents that are already linked to from the current contract workspace.
- Documents that are not from a combined spend contract workspace.
- Documents from a contract workspace that is closed, or expired, or on hold.

New warning messages are displayed in the following scenarios:

- On the source contract workspace page, when it is being amended.
- On the source contract workspace page, when any document that is linked to from other contract workspaces is being edited or replaced.
- On the source contract workspace page, when any linked document is being deleted.
- On the source contract workspace page, when users click **Finalized**, **Make Draft**, or **Publish** for a linked document.

New audit log entries are added on the **History** tab in the following scenarios:

- On the source contract workspace and the linked contract workspace, when a new linked contract document is created in the linked contract workspace.
- On the source contract workspace and the linked contract workspace, when the linked contract document in the source contract workspace is edited, replaced, deleted, published, finalized, or made a draft.
- On the source contract workspace and the linked contract workspace, when the linked contract document in the linked contract workspace is deleted.

Enabling the Linked Contract Documents for All Procurement Contract workspaces

The linked contract documents functionality can be enabled for all procurement contract workspaces, irrespective of whether they are of the combined spend type or not. This allows you to use this functionality without enabling the Aggregating spend data in contract workspaces feature.

Important Disclaimers and Legal Information

Hyperlinks

Some links are classified by an icon and/or a mouseover text. These links provide additional information.
About the icons:

- Links with the icon : You are entering a Web site that is not hosted by SAP. By using such links, you agree (unless expressly stated otherwise in your agreements with SAP) to this:
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