

Contract Management  
Solution Template User Guide

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# Alfresco Workdesk



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## Introduction

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Besides collaboration centric document challenges there are a lot of process centric business challenges. The goals of automating these processes are increased process efficiency, cost savings, increased customer or employee satisfaction, and achievement of compliance. Many of the analysts also call this Transactional Content Management. **Alfresco Workdesk** is a purpose-built solution for **process centric or transactional content processes**.

Alfresco Workdesk helps you streamline document centric business processes and cases. With its business role management feature it provides every user group with the right documents in the right business context and in the right application, that can be created by simple configuration rather than coding. Since documents, processes and cases can be accessed via any standard web browser, from within most Office applications and from mobile devices, processes do not stop at the boundary of an enterprise and users are optimally supported in their way of working. Thus processes are accelerated dramatically and compliance is assured.

Alfresco Workdesk provides **faster time-to-value** because it offers state of the art ECM functionality out of the box and makes the creation of customer specific business applications as easy as possible. Productivity enhancing features like dynamic folders, views and actions, which are determined by the user's role in the process allow that the very same document can live in many different views. Hence, **Alfresco Workdesk** helps your organization to **process cases, deals, loans, claims faster and more efficiently**.

There are 3 modules of Workdesk offering the same functionality on different devices:

- **Alfresco Workdesk** - Robust features and flexibility on any web browser
- **Alfresco Office Workdesk** - Bypass the browser with seamless desktop integration
- **Alfresco Mobile Workdesk** - Mobilize your business processes on iPads and iPhones

All Alfresco Workdesk products can be adapted to work as unique solution for lots of typical business use cases. Examples are a Case Management solution to work on cases often known as Contract Management, Claims Handling solutions, Loan Origination solutions, Employee Hiring solution and many more. The focus of this document shall be on a Contract Management solution based on Alfresco Workdesk, but other Solution Template documents for other Alfresco Workdesk solutions will be published soon.

## About this document

This guide shall be the entry point for business users, administrators and developers that want to understand and build up a Contract Management Solution based on an Alfresco Workdesk and a corresponding Solution Template.

In *Management Summary* the idea behind Solution Templates is described.

The chapter *The Concept* describes solutions templates based on Alfresco Workdesk in general and explains common patterns for such solutions, such as data models and workflows.

The chapter *Contract Management for sales and purchasing* gives an overview of the Contract Management Solution Template that we deliver.

The chapter *In-Depth Description of the Sample Scenario* describes in detail the use case scenarios available with the deployed Solution Template.

In chapter *Configuration and adaptation* the configuration of the Contract Management Solution Template is described and possible extension points are listed.

Section *Future Plans* gives an overview on the improvements planned for Alfresco Workdesk 4.2 and the Contract Management Solution Template based on that version.

Finally the *Appendix* will give you an overview of the basic data model used in the Solution Template.

## Intended audience

This document is intended for everyone who is interested to gain experiences with Solution Templates based on Alfresco Workdesk. This includes

- Business users who plan to introduce a contract management solution and want to take advantage of an existing Solution Template
- ECM Consultants who deployed Alfresco Workdesk and want to build and customize business solutions based on an Alfresco Workdesk Solution Template.
- System Administrators who have to install and manage a vital Alfresco Workdesk solution environment.

Depending on your business role and on the solution you want to implement, you need basic skills to manage

- the underlying Alfresco system
  - deployment of custom data models
- Alfresco Workdesk
  - basic configuration
  - assigning business roles to pages and functions
- the Activiti process engine
  - designing Activiti workflows
  - deployment of custom workflow definitions

Furthermore it is recommended (if you are system administrator) to have experience with:

- Application servers:
  - Deploying web applications (on common application servers, e.g. Apache Tomcat)
  - Classpath configurations
  - Configuration of the libraries used by your web application
  - log4j configuration, reading of log files
  - xml
- JDBC connections
- Database knowledge (running SQL scripts)
- Web applications in general

 **In general you must have the authorization to modify and create resources.**





## Typographical conventions used in this guide

Convention	Example
Important terms	Alfresco
Classes	OwApplicationContext
Methods	getName()
Source Code	public void myMethod(){}
// Comments in Source Code	simple source code comment
Java Package	com.wewebu.server.app
Plugins	com.wewebu.ow.server.plugin.owdemo.owmain
Path	com/wewebu/ow/server/...
XML Attribute	<node>
XML value	value
Product-specific terms	Add Document

### Formatting legend for brackets in Source Code, Paths, File Names, and so on:

Ellipsis (...): Parameter the user must supply

Between brackets [...]: Optional items

Between braces {...}, choices separated by pipe |, example: {even|odd}: Set of choices from which the user must choose only one

### The following placeholders are used in this document:

- (Alfresco) - root directory of Alfresco installation
- (Tomcat) - installation root of Tomcat application server
- (Workdesk) - root directory of AWD deployment

## Abbreviations

AMP	Alfresco Module Package
AWD	Alfresco Workdesk
AOWD	Alfresco Office Workdesk
AMWD	Alfresco Mobile Workdesk
BPM	Business Process Management
CMIS	Content Management Interoperability Services
ECM	Enterprise Content Management

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## Checklist

1.	<b>Business Use Cases</b> <input type="checkbox"/> Are the business use cases you want to implement with the Solution Template completely defined?
2.	<b>Prerequisites and checks for initial configuration</b> <input type="checkbox"/> Did you obtain valid licenses for Alfresco Workdesk and Alfresco Office Workdesk? <input type="checkbox"/> Was the Solution Template deployed correctly? Did you follow the steps in the <i>Workdesk Contract Management Deployment Guide</i> ? <input type="checkbox"/> Can you work on all your processes?
3.	<b>Adaptation and extension</b> <input type="checkbox"/> Have you identified where you have to adapt the Solution Template to your customer needs. See also section <i>Configuration and adaptation</i>

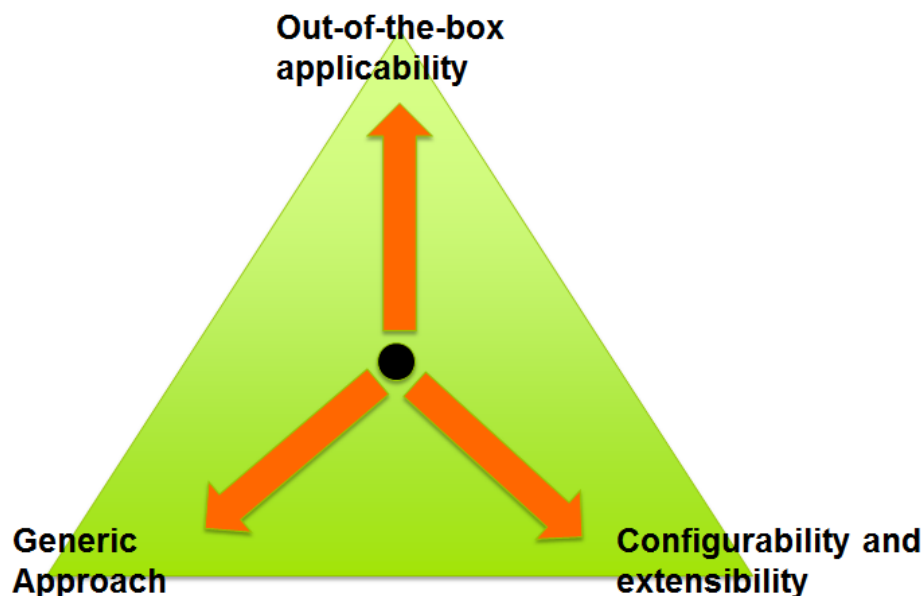
## Management Summary

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In order to reduce the time to value for Alfresco Workdesk projects the idea of Solution Templates was born: A Solution Template covers a certain business use case and can be deployed, adjusted to a customer situation and set into production rapidly. In order to achieve this Solution Templates consist of a pre-defined data model that is yet very flexible, a set of business roles, solution-specific functionalities, case files, workflows, and reports as well as documentation and an installation package.

The Solution Templates are designed such that they are ready to run and that a business administrator in a short period of time can configure a specific solution using the Workdesk user interface. Solution templates can serve 3 main purposes. First, they are the ideal starting point for configuring custom solutions and dramatically reduce project time and efforts. Second, they can serve as entry point for partners who want to create specific customer ready business solutions. Finally, they are perfect out-of-the-box demo cases for the benefits of Alfresco and Alfresco Workdesk especially for business users and decision makers.

The first Solution Template available is for contract management and contains everything for managing the lifecycles of sales and purchasing contracts. Central to it is a pre-defined contract file with a given folder structure and set of properties, a relationship model, and several document templates. Users belong to different business roles allowing them to create new contracts, approve them – with pre-defined workflows - from the business or legal side and last but not least create new contract templates with customer specific nomenclature and sets of properties by configuration. The advanced relationship model allows very convenient navigation between single documents, contracts and contracting parties and gives together with the reporting functionality an up to now unmatched level of transparency for managers and users alike.



## The basic ideas

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The Alfresco Workdesk Solution Templates combine 3 basic ideas that make them extremely useful. All of them are built using a generic approach that leverages the Alfresco base technology and that ensures easy adaptability and configuration – idea number 2. Finally, they are applicable out of the box since they include pre-defined business solutions (idea 3) that can be used with little or no configuration as show cases, starting points for projects or even in real life.

### Generic Approach

Solution Templates add value to Alfresco Workdesk through a reusable data model and business user ready configuration templates.

The concepts behind can be reused for any case management solution and are independent from the business scenario.

There are four essential concepts that make Solution Templates so valuable:

- Case templates
- Object relations
- Extension points
- Configuration by business user

### Case template

One central concept that makes Solution Templates so valuable is the idea of customizable case template that can be pre-defined for specific business cases.

A case template is an object that contains other objects of any type. Moreover, the case template has a set of use case specific properties assigned. This case template is used to instantiate case files that allow a 360 degree view on a specific business case, e.g.:

- A contract file that contains all documents (contract, signature files, terms and conditions, correspondence ...) and all contract related objects (contract partners, ...).
- A claims file may contain all documents (contract, policy, loss report) and all preceding claims.

### Object Relations

An important added value is the intelligent and flexible management of objects and their mutual relations. This can be reused in any real life scenario, e.g.:

- Contracts are related to one or more contracting partners.
- Claims are related to one or more involved parties.

## Extension Points

Objects often are stored and administrated in an external system (i.e. contracting partners in the CRM system). The generic approach of the Solution Template allows the replacement of the object relation by an extension point to integrate into the external system.

Remark: The implementation is not part of this Solution Template.

## Configuration by Business User

Based on the pre-defined use cases the business users can select and define their own use case specific templates directly in the Workdesk user-interface.

For example, in the Contract Management Solution Template the Contract Administrator can define solution specific contract files.

## Configurability and Extensibility

Solution Templates are patterns or models that need to be adopted to map them to a concrete business case. Solution Templates are configurable through

- Refinement and enhancement of the data model
    - Container, documents, folder, objects and relations between objects
  - Definition of additional workflows
  - Configuration of business roles
- and many more.

## Applicable Out-of-the-box

Solution Templates are ready to use in a default configuration:

- Ready to use contract management solution with pre-configured sales and procurement contracts
- Includes sample contract template, sample documents and document templates, sample contract partners
- Easy going live!
  - Business Administrator defines own contract template (selects the relevant properties)
  - Business Administrator adds the company specific document templates
- Documentation
- Easy deployment process

## The Concept

Any Solution Template based on the Alfresco Workdesk product suite follows the same principles independent of the specific use case. In this chapter the common principles of Solution Templates are described.

## Data Model

The heart of every business solution based on Alfresco Workdesk is a data model related to that solution. This data model describes the metadata of folder types, case types and document types.

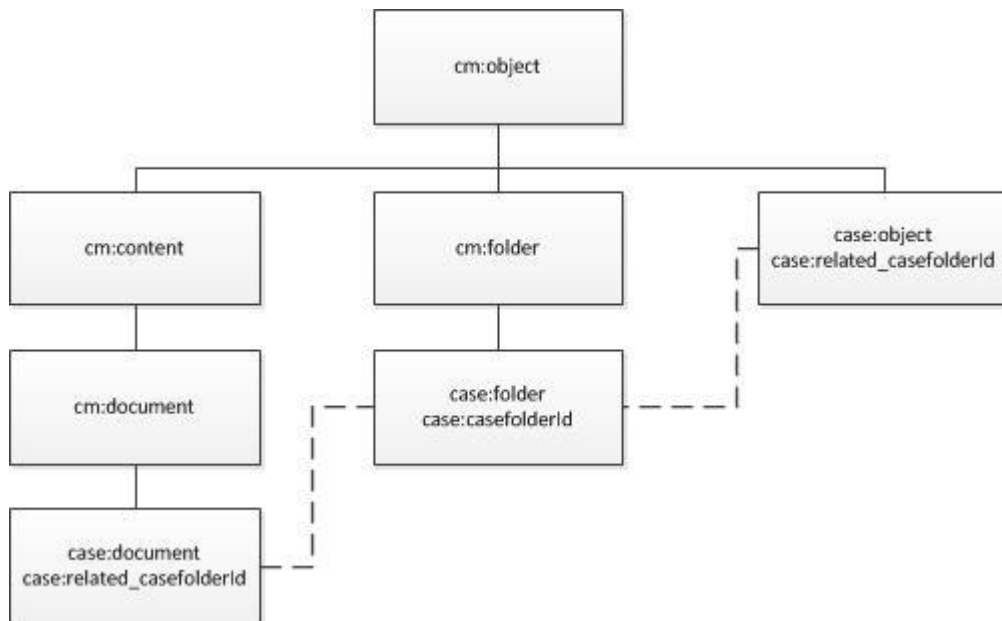
### Example 1:

For Employee Onboarding, there is an onboarding case folder with the properties hiring date, salary and department. This folder contains the related documents like job description, employee contract or signed confidentiality agreements.

### Example 2:

For Contract Management there is a contract case folder with properties like contract id and contract status. This case folder contains the documents and the related objects (like contract partners). In short we refer to the contract management case folder as “a contract”. Please note that a contract can - and in most cases will – consist of several single documents.

The data model for a specific solution is just a refinement of the following generic approach:



## Workflows

Each Alfresco Workdesk Solution Template provides a set of workflows. Some of them are specific to the solution, e.g. the process to setup new employees' system logins (exemplary for an employee onboarding solution) or the process to get an internal legal approval (e.g. in a contract management solution). Additionally, there are general workflows used in every Alfresco Workdesk Solution Template, like review and approval workflows.

Fully structured workflows are often too inflexible and are neither reflecting the reality nor real world business scenarios, e.g. exceptions are not completely covered, which results in non-documented user actions that are not part of the original process.

In most cases a complex structured process can be split up into several separated activities, where each activity is driven or initiated by the business specialist and might be optional or mandatory. Activities typically are simple one or two step workflows. Activities can be processed only once or multiple times depending on the concrete case. Those activities have to be documented as they are relevant for reporting.

The standard Alfresco Activiti integration is a good starting point for this approach. There are already some basic workflows available which can be used in the Solution Template, like *Review and Approve*, *Group Review and Approve* or *Adhoc* processes.

## Scope of Configuration

Although the Solution Template addresses a certain use case (here: Contract Management) a concrete business case is different:

- Nomenclature is different and company specific.
- Data fields used for a certain business case may differ
  - i.e. employment contracts and procurement contracts use different properties
- Any company has their own document templates
- Object relations always are solution specific
  - i.e. contracts can have one or more external partner / counter parties
- The business roles in each organization are company specific
- The information accessible via the user interface is solution and business role specific. This applies to – amongst others
  - Case folders
  - Solution specific searches
  - Available inboxes (access workflows)
- The functionality accessible through the user interface is solution and business role specific, for example the functions in the context menu i.e.:
  - View
  - Edit
  - Launch Workflow
- The look and feel of the user interface has to match the company requirements
- There are typically customer specific workflows which have to be added to the Activiti environment

In order to address these topics there are several ways to adapt a Solution Template and transform it into a concrete “end-user-ready” solution.



## Configuration of Alfresco Workdesk

Alfresco Workdesk allows building solutions only via configuration (without programming). This covers:

- Nomenclature can be easily defined by localization files
- The look and feel can be adapted through design files
- The information and functionality accessible can be defined and configured at several levels (main modules, files and documents).

For details regarding the configuration of Alfresco Workdesk see the product documentation of Alfresco Workdesk.

## Configuration of the Solution Template

The Solution Template helps you to configure your specific solution very easily by picking from:

- Pre-defined main modules,
- Pre-defined search templates,
- Pre-defined functions,
- Pre-defined Activities (Workflows),
- Pre-defined case templates (i.e. contract template),

Further refinement can be achieved by:

- Administration of document templates,
- Relationships and handling of relationships between objects,
- Adaptable data lists (i.e. for contract status, regions, ...) (see also forecast regarding data lists in section *Outlook*)

See the details about configuration of the Solution Template in the following chapters:

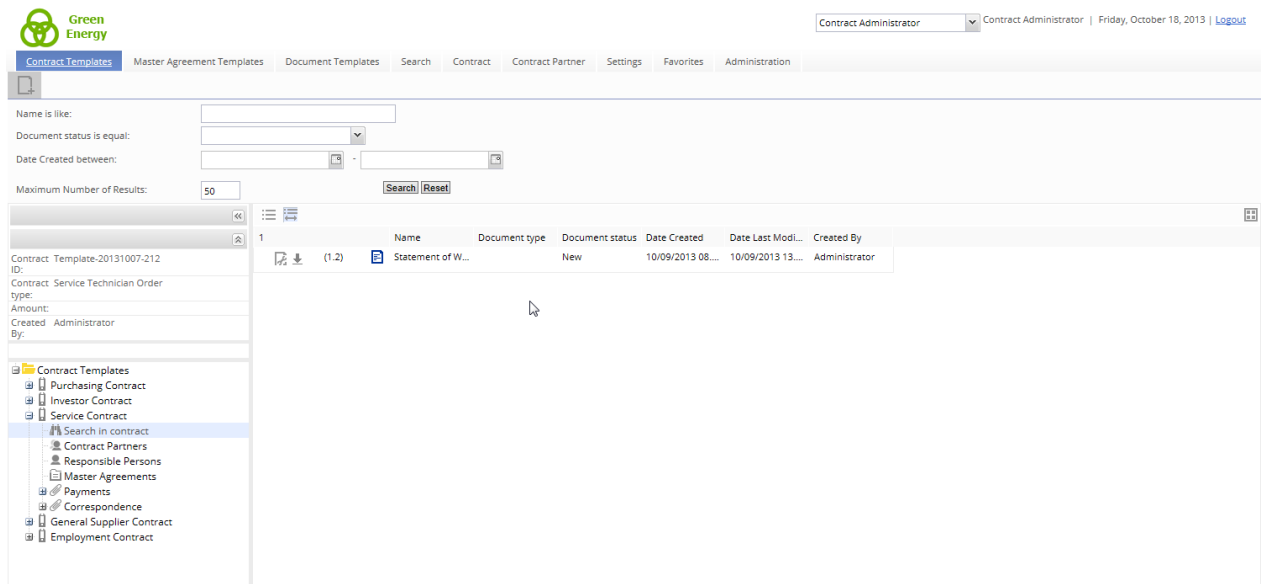
- What can be configured?  
*Contract Management for sales and purchasing*
- How can it be configured?  
*Configuration and adaptationContract Administrator*

The Contract Administrator is responsible for the definition of reusable contract templates and for the administration of the document templates.

The following users can act as Contract Administrator:

User	Password
Gary Manager	

Login: cmg	abs
Administrator Login: cmgadmin	abs

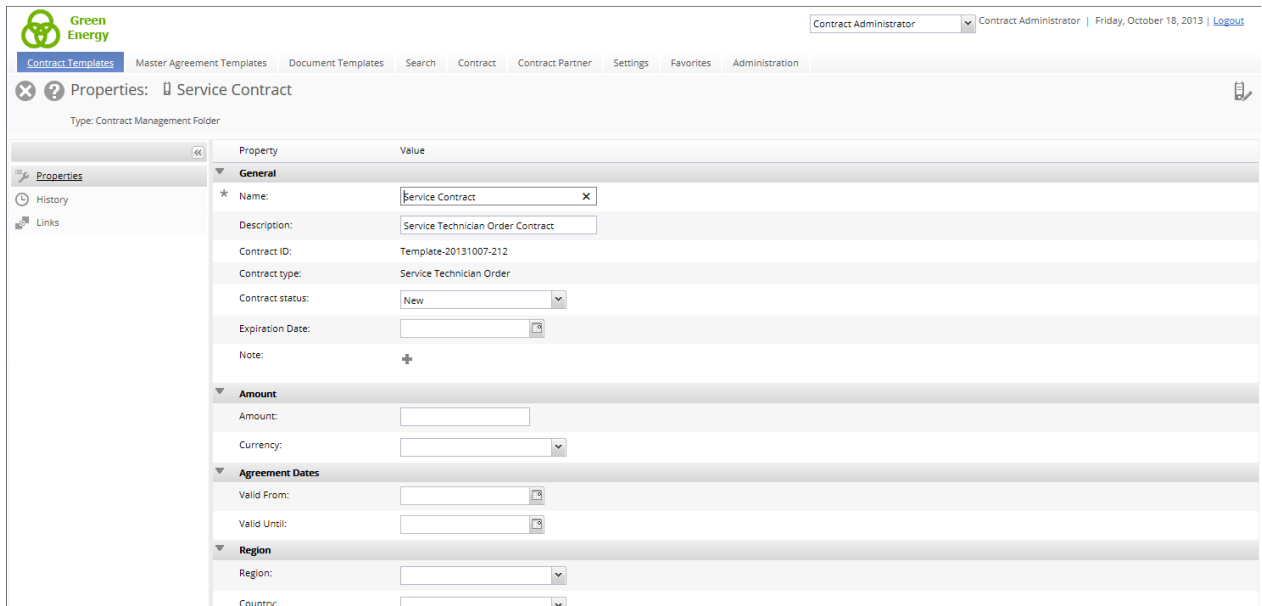


The screenshot shows the Green Energy Contract Administrator interface. The top navigation bar includes 'Contract Templates', 'Master Agreement Templates', 'Document Templates', 'Search', 'Contract', 'Contract Partner', 'Settings', 'Favorites', and 'Administration'. The user is logged in as 'Contract Administrator' on Friday, October 18, 2013.

The search results table shows one result:

Name	Document type	Document status	Date Created	Date Last Modified	Created By
Statement of W...		New	10/09/2013 08...	10/09/2013 13...	Administrator

The left sidebar shows a tree view of contract templates, including 'Contract Templates', 'Purchasing Contract', 'Investor Contract', 'Service Contract', 'Search in contract', 'Contract Partners', 'Responsible Persons', 'Master Agreements', 'Payments', 'Correspondence', 'General Supplier Contract', and 'Employment Contract'.



The screenshot shows the 'Properties: Service Contract' window. The left sidebar includes 'Properties', 'History', and 'Links'. The main area displays the following properties:

Property	Value
<b>General</b>	
Name:	Service Contract
Description:	Service Technician Order Contract
Contract ID:	Template-20131007-212
Contract type:	Service Technician Order
Contract status:	New
Expiration Date:	
Note:	
<b>Amount</b>	
Amount:	
Currency:	
<b>Agreement Dates</b>	
Valid From:	
Valid Until:	
<b>Region</b>	
Region:	
Country:	

The Contract Administrator has access to the following main modules:

- Contract Templates

Browse the existing contract templates, add new contract templates and edit existing templates.

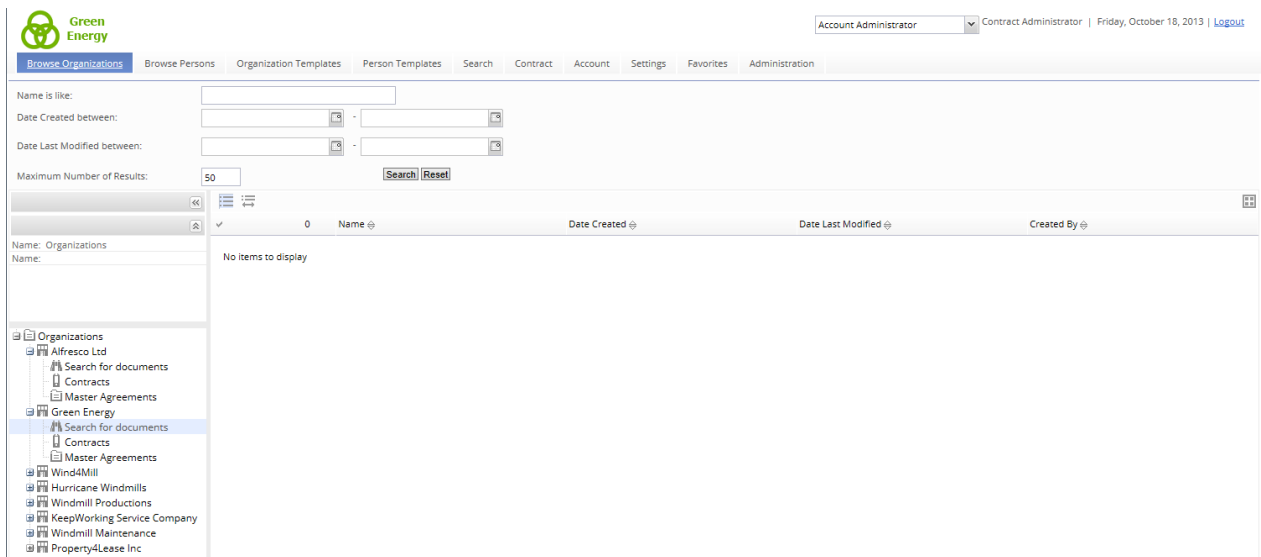
- Master Agreement Templates  
Browse the existing master agreement templates, add new master agreement templates and edit existing templates.
- Document Templates  
Browse the existing document templates and add new document templates.
- Search  
Select and execute searches
- Contract  
Browse and work with contracts
- Contract Partner  
Browse and work with contract partners
- Settings  
Personal settings
- Favorites  
Access personal favorites
- Administration  
Assign plugins and functionality to roles

## Account Administrator

The Account Administrator is the business administrator who is responsible for the administration of the accounts (contract partners).

The following users can act as Account Administrator:

User	Password
Administrator Login: cmgadmin Select role "Account Administrator"	abs



The Account Administrator has access to the following pages:

- Browse Organizations
- Browse Persons
- Organization Templates  
Browse, add and work with “organization templates”.
- Person Templates  
Browse, add and work with “persons”.
- Search  
Select and execute searches
- Contract  
Browse and work with contracts
- Account  
Browse and work with accounts (i.e. to check terms and agreements)
- Settings  
Personal settings
- Favorites  
Access personal favorites
- Configuration and

**Remark:** In this document you will find the configuration of the solution template. The configuration of Alfresco Workdesk is described in detail in the corresponding product documentation.

# Contract Management for sales and purchasing

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Contract Management is a wide area of concrete business use cases and can be shaped into either a vertical solution or one that is independent from industry specific characteristics (horizontal). Contracts are needed everywhere, e.g. employment contracts, purchasing contracts, loan contracts, investment contracts and many more.

The Contract Management Solution Template in principle is independent from a certain contract type. (Refer also to section *Scope of Configuration*)

However, in order to show the functionality and flexibility of the Solution Template in the life system we are providing a sample use case.

In this documentation and for the pre-defined showcase delivered with the Solution Template we chose the example of a sales or procurement contract in order to explain a concrete scenario the Solution Template can be used for.

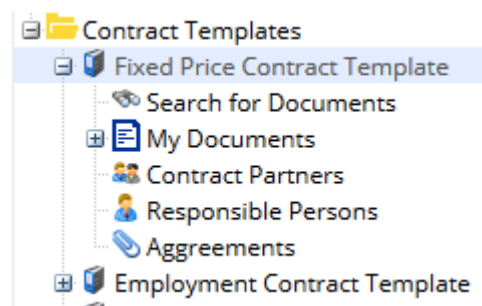
The following section gives an overview of a typical sales or procurement contract and covers the areas where contract management solutions can be customized.

## Contract

In the Contract Management Solution Template “a contract” is defined as a contract file with a given folder structure, set of properties and initial documents that are present as soon as a new contract is created. Please note that a contract can - and in most cases will – consist of several single documents. New contracts are created using Contract Templates ensuring consistency and completeness of all contracts.

## Pre-defined Contract Templates

The Contract Template defines the folder structure, set of properties and initial documents of a specific contract type, e.g. a purchasing contract. Every new contract of a specific type will have this structure, set of properties and initial documents. In the sample Solution Template we deliver some pre-defined contract templates.



The Contract Administrator can define new Contract Templates.

## Contract types

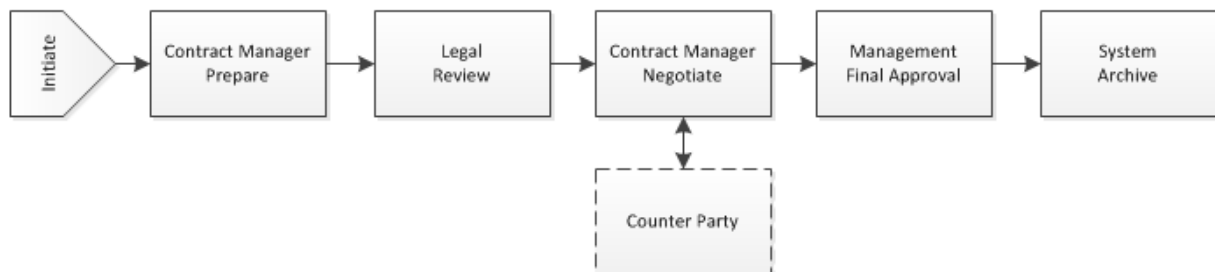
In the Contract Management Solution Template we have pre-defined the following contract types:

- Purchasing contract
- Fixed price contract
- Statement of work
- Indefinite delivery contract
- Cost reimbursement contract
- License contract
- Time and material contract
- Renewal contract

The list of contract types can be adapted to the customer's needs. See also the section *Data Lists*.

## Contract lifecycle

The following diagram shows the lifecycle of a typical procurement contract:

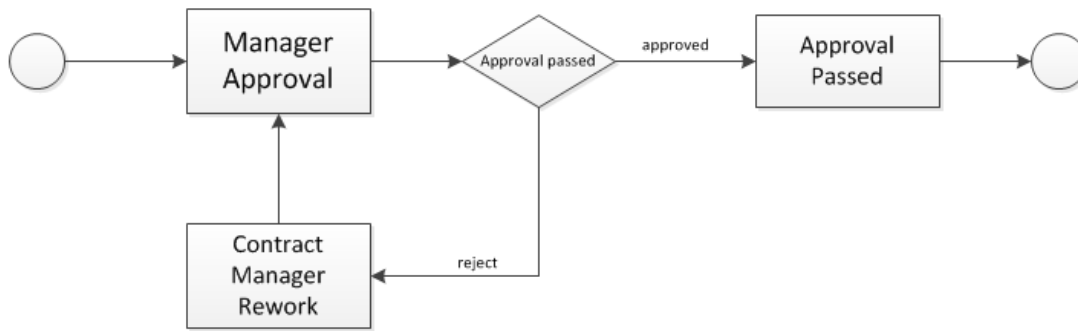


This example shows that the approach of separating the contract lifecycle into smaller units and activities (as described in section *Workflows*) allows solutions to be as flexible as possible: in fact – the management approval and the legal review may be necessary more than once and can be moved around the overall process (i.e. management approval takes place *before* negotiation and a second time *after* negotiation).

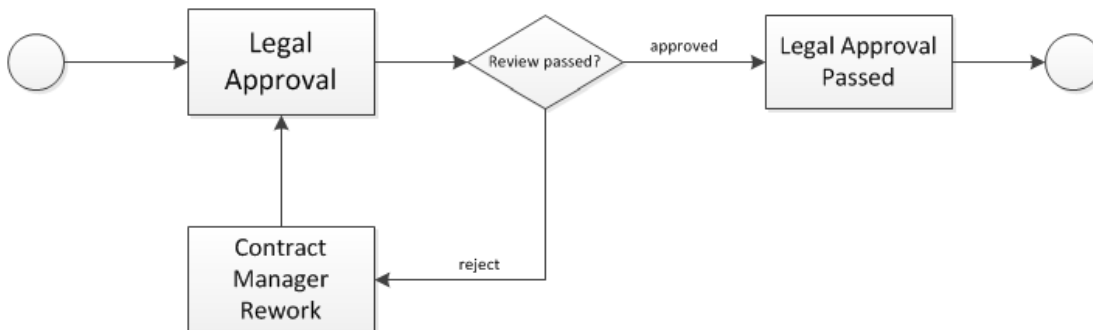
In order to achieve this flexibility we split up the complete process into separate activities.

For the Contract Management Solution Template we pre-define two dedicated workflows:

- Manager Approval



- Legal Approval



Any other customer specific workflow can be added through the Activiti console.

## Status Management

For the procurement contract we have defined the following states (pre-defined in the Solution Template):

- Preliminary

New contracts are automatically assigned to "Preliminary". In this state all contract metadata can be changed.

- New

Similar to the "Preliminary" status, but all important metadata (contract partners etc.) are already set.

- Rejected

The contract is rejected by any stakeholder.

- Pending

The contract is agreed and approved but the start date (*valid from*) is in the future.

- Effective

The contract is agreed and approved and the start date (*valid from*) lies in the past

- Closed

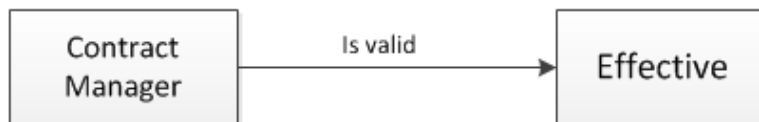
The end date for the contract is reached.

- Archived

The contract is archived for compliance purposes.

State changes can be driven through the Contract Manager itself or through the system.

Sample: The change in state to Effective is driven by the responsible contract manager:



In the Solution Template the status model can be adapted to the customer's needs. See also the section Data Lists.

## Business Roles

In the Solution Template the following business roles are already pre-defined:

- Contract Manager

A person in charge of the contract. The Contract Manager is the owner of the contract, is responsible for the process, involves all stakeholders, and works on the contract itself.

- Legal

A legal department member who is responsible for contract approvals.

- Management

Responsible for management approval of the contract.

- Contract Administrator

The Contract Administrator is responsible for the definition of reusable contract templates and for the administration of the document templates.

- Account Administrator

The business administrator who is responsible for the internal administration of the accounts (contract partners).

Remark:

In the real world Contracting Partners are often defined in external systems, e.g. CRM or ERP. The Solution Template is not integrated with external systems out-of-the-box. However, the Alfresco noderef object can be replaced by an extension point to an external system. Therefore, in a real life implementation we have hooks for the integration of external systems.



See also the concept of related objects as described in the next section *Related Objects*.

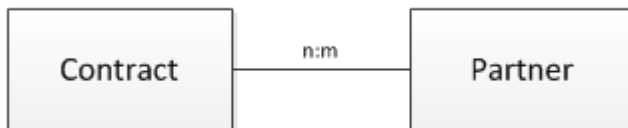
## Related Objects

Contracts typically relate to other business objects in the company:

Any contract can be related to one or more contracting partners.

In order to manage contracting partners we enhanced the contract data model with a contract partner object. As described below (in *Business Roles* section) these data are administrated by the Account Administrator in the sample configuration.

The relation between the contract partner object and the contract itself is implemented by a CMIS *noderef* object. This allows to define any n:m relation between contracts and partners.



This concept has giant advantages:

- You can navigate in the system from contract to partner (see all partners related to the contract) and back from partners to contract (which contracts do we have with a certain partner?)
- The administration of the related objects uses the same UI as the administration of the contract template. This makes it easy for the business users to manage their business data.

Furthermore, the contract partner object can serve as an example: the underlying data model and functionality can be reused for any other related object i.e. employee object related to an employment contract or “subject of the contract” related to the contract.

The related objects can be adapted to specific use case scenarios through:

- Enhancing of the existing contract partner object
- Refining of the underlying data model and define your own related objects
- Replacing the internal data model through external data (need an adapter).

In the real world Contracting Partners are often defined in external systems, e.g. CRM or ERP. The Solution Template is not integrated with external systems out-of-the-box. However, the Alfresco *noderef* object can be replaced by an extension point to an external system. Therefore, in a real life implementation we have hooks for the integration of external systems.

## Data model

Besides the contract type, the status and the related object each contract has a set of properties assigned to it. For example, in the procurement contract we have properties like

- Contract ID
- Amount
- Confidentiality
- Cost center
- Period
- Penalty
- Region
- ...

The data model is very flexible since most of the properties are defined as aspects (aspects are properties that are optionally assigned to an object class). Whenever a business user (contract Administrator) defines a contract template he selects the relevant properties. (Please note: A contract template describes the structure of a certain contract type and is selected when a specific contract is created. The contract is the container for all contract related documents and data.).

For a solution the Contract Administrator can define as much contract templates as necessary.

The data model can be enhanced to match the needs of the end customer since it is always based on the same base classes, whereas properties for different use cases are attached as needed. See section *A1. Contract Management Data Model*.

## Search

Searching for contracts is one of the most important functions in a contract management system. Especially at the end of the contract lifecycle searching and retrieving contracts becomes one of the main features of an end customer solution. With Alfresco Workdesk there are two approaches to search contracts:

- Accessing contracts through browsing a tree view of all existing contracts and partners.
- Searching with pre-defined search templates

The Contract Management Solution Template comes with some pre-defined searches. Additional Searches can be added easily.

## Reports

The Contract Management Solution Template contains one simple pre-configured report that shows (filtered by date range and contract owner) the distribution of contracts according to contract status. Additional reports can be generated.

## In-Depth Description of the Sample Scenario

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After the installation of the Solution Template (as described in the *Deployment Guide*) the Solution Template is ready to use for the business user.

In the following we briefly describe the usage of the Solution Template from different points of views (business roles). Before the business roles are described in detail read here some general remarks.

### General Remarks

This scenario handles business specific use cases implemented on AlfrescoOne and Alfresco Workdesk and inherits all features and functions from the underlying Alfresco stack. There are some segments where this inheritance becomes important for the use case:

- Working with documents
- Executing Activiti workflows
- Involvement of external users

### Working with Documents

All documents managed within the solution template are stored in the AlfrescoOne repository. Provided that the Alfresco user has the necessary access rights the Contract Management related documents can also be accessed by any other AlfrescoOne user interface like Share. Vice versa any document functionality offered by an AlfrescoOne repository, e.g. rules, e-mail intake, access-control, etc., can be used for the Contract Management use case.

An example where this is practiced is the creation of documents. In addition to the solution specific creation via templates there are several ways to create documents outside the Solution Template: assuming incoming (signed) contracts are scanned through any scan client these documents can be assigned to contracts handled in the Contract Management Solution Template.

### Executing Activiti Workflows

The Solution Template uses the standard integration of Activiti Workflow into AlfrescoOne respectively Alfresco Workdesk. Therefore any Activiti workflow that is created for the Solution Template is available through any other AlfrescoOne client like Share. Reverse all standard Workflows defined in Activiti today are visible and can be accessed through the Contract Management Solution Template.

### Involving of External Users

Contract Management is a good example for involvement of external users. Typically a contract has to be negotiated with external parties like customers, suppliers, vendors, et cetera.

There are several ways to address this:

- The external users are licensed users of the Alfresco repository
- Use hybrid cloud and workflows

## Business roles defined in the Solution Template

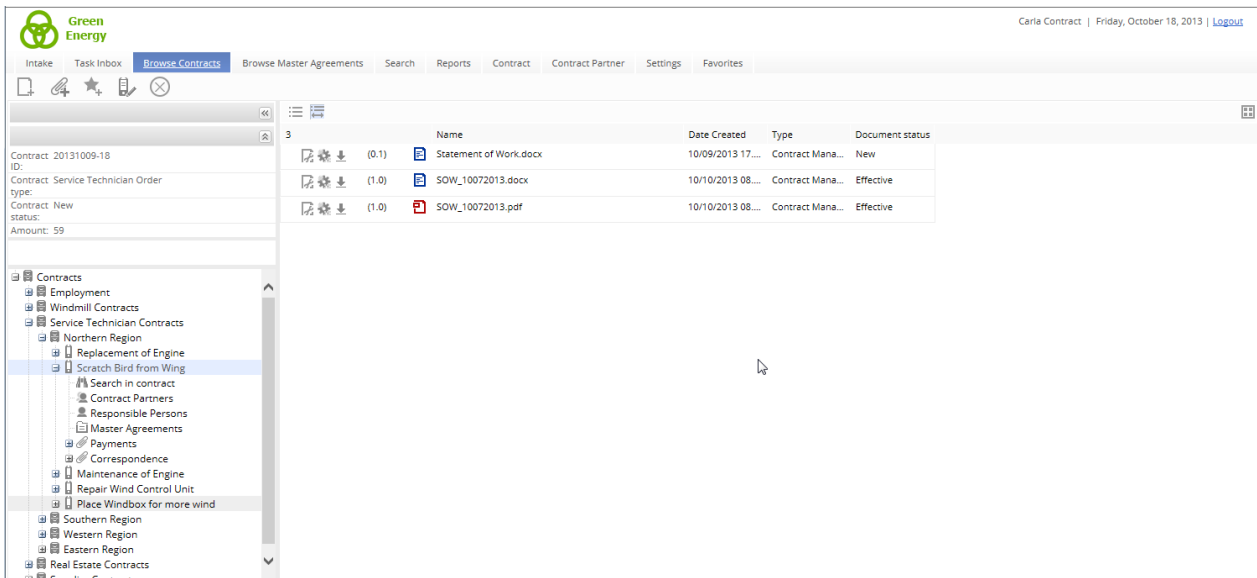
The Solution Template comes with some pre-defined business roles. This chapter describes what the members of these roles are responsible for in the process and what views and functions are assigned to them. For short we just refer to the name of a role when we actually mean a user who is member of that respective role.

### Contract Manager

The Contract Manager is the person in charge of the contract management process. The Contract Manager is the owner of the contract, is responsible for the process, involves all stakeholders and works on the contract itself.

The following users are members of the Contract Manager business role and can act accordingly:

User	Password
Carla Contract Login: ccm	abs
Stefan Legal Login: sle	abs
Gary Manager Login: cmg	abs
Administrator Login: cmgadmin	abs



The Contract Manager has access to the following main modules:

- **Intake**  
All incoming documents (like scanned documents) that come into the system are placed into this generic inbox unless they are created via the functions of the Solution Template. It is the responsibility of the user to assign these unassigned documents to the matching contract file.
- **Task inbox**  
Access all incoming Activiti tasks. The Contract Manager gets here the responses to the approvals he/she sent out to Legal and Management.
- **Browse Contracts**  
Browse and work with contracts and contract containers: access to all contract related objects.
- **Browse Contract Master Agreements**  
In case Master agreements are used access them here.
- **Search**  
Select and execute the pre-defined searches.
- **Reports**  
Generate and configure the pre-defined report.
- **Contract**  
Browse and work with contracts
- **Contract Partner**  
Browse and work with contract partners
- **Settings**

Personal settings

- Favorites

Access personal favorites

## Legal

Legal is the business role for legal department members who are responsible for contract legal approvals.

The following users can act as Legal:

User	Password
Stefan Legal Login: sle	abs
Administrator Login: cmgadmin	abs

The screenshot displays the 'Green Energy' system interface. At the top, the user 'Stefan Legal' is logged in on Friday, October 18, 2013. The navigation bar includes 'Task Inbox', 'Contract', and 'Account'. The 'Task Inbox' is active, showing a list of tasks. The left sidebar indicates 'Inbox (3)'. The main table lists three tasks, all of type 'Legal Approval' and 'Review', created on 10/16/2013 at 12:37. Each task has a comment: 'Carla Contract 10/14/2013 15:22 Please review and approve, if ok.'.

Description	Task Type	Date created	Comment
Legal Approval	Review	10/16/2013 12:37	Carla Contract 10/14/2013 15:22 Please review and approve, if ok.
Legal Approval	Review	10/16/2013 12:37	Carla Contract 10/14/2013 15:22 Please review and approve, if ok.
Legal Approval	Review	10/16/2013 12:37	Carla Contract 10/14/2013 15:22 Please review and approve, if ok.

Legal has access to the following main modules:

- Task inbox

Access all incoming Activiti tasks. The Contract Manager gets here the responses to the approvals he/she sent out to Legal and Management.

- Contract

Browse and work with contracts

- Account

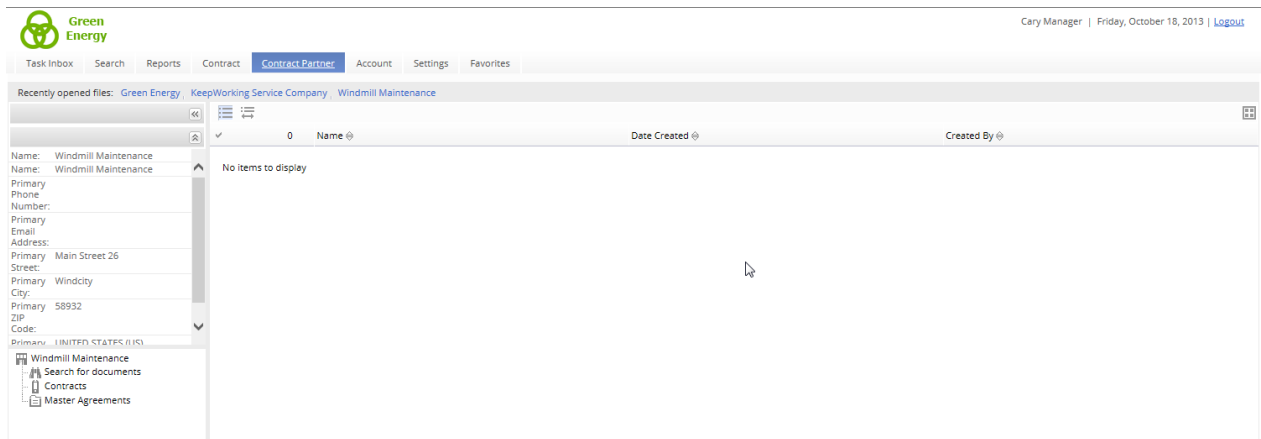
Browse and work with accounts (i.e. to check terms and agreements)

## Management

The Management group is responsible for the management approval of the contract

The following users can act as Manager:

User	Password
Carla Contract Login: ccm	abs
Gary Manager Login: cmg	abs
Administrator Login: cmgadmin	abs



Management has access to the following main modules:

- Task inbox  
Access all incoming Activiti tasks. The Manager gets here tasks for approving contracts.
- Search  
Select and execute searches
- Reports  
Generate and configure the pre-defined report.
- Contract

Browse and work with contracts

- Contract Partner

Browse and work with contract partner

- Account

Browse and work with accounts (i.e. to check terms and agreements)

- Settings

Personal settings

- Favorites

Access personal favorites

## Contract Administrator

The Contract Administrator is responsible for the definition of reusable contract templates and for the administration of the document templates.

The following users can act as Contract Administrator:

User	Password
Gary Manager Login: cmg	abs
Administrator Login: cmgadmin	abs

The screenshot displays the Green Energy Contract Management Solution Template interface. The top navigation bar includes the Green Energy logo and a user menu showing 'Contract Administrator' with a dropdown arrow, and a status bar indicating 'Contract Administrator | Friday, October 18, 2013 | Logout'. The main navigation tabs are 'Contract Templates', 'Master Agreement Templates', 'Document Templates', 'Search', 'Contract', 'Contract Partner', 'Settings', 'Favorites', and 'Administration'. The 'Contract Templates' tab is active, showing a search interface with filters for 'Name is like:', 'Document status is equal:', and 'Date Created between:'. The 'Maximum Number of Results' is set to 50. The search results table shows one result: 'Statement of W...' with a document type of 'New', created on '10/09/2013 08...', and last modified on '10/09/2013 13...'. The sidebar on the left shows a tree view of contract templates, including 'Contract Templates', 'Purchasing Contract', 'Investor Contract', 'Service Contract', 'Search in contract', 'Contract Partners', 'Responsible Persons', 'Master Agreements', 'Payments', 'Correspondence', 'General Supplier Contract', and 'Employment Contract'.



Green Energy

Contract Administrator | Contract Administrator | Friday, October 18, 2013 | Logout

Contract Templates Master Agreement Templates Document Templates Search Contract Contract Partner Settings Favorites Administration

Properties: Service Contract

Type: Contract Management Folder

Property	Value
<b>General</b>	
Name:	Service Contract
Description:	Service Technician Order Contract
Contract ID:	Template-20131007-212
Contract type:	Service Technician Order
Contract status:	New
Expiration Date:	
Note:	
<b>Amount</b>	
Amount:	
Currency:	
<b>Agreement Dates</b>	
Valid From:	
Valid Until:	
<b>Region</b>	
Region:	
Country:	

The Contract Administrator has access to the following main modules:

- **Contract Templates**  
Browse the existing contract templates, add new contract templates and edit existing templates.
- **Master Agreement Templates**  
Browse the existing master agreement templates, add new master agreement templates and edit existing templates.
- **Document Templates**  
Browse the existing document templates and add new document templates.
- **Search**  
Select and execute searches
- **Contract**  
Browse and work with contracts
- **Contract Partner**  
Browse and work with contract partners
- **Settings**  
Personal settings
- **Favorites**  
Access personal favorites
- **Administration**  
Assign plugins and functionality to roles

## Account Administrator

The Account Administrator is the business administrator who is responsible for the administration of the accounts (contract partners).

The following users can act as Account Administrator:

User	Password
Administrator Login: cmgadmin Select role "Account Administrator"	abs

Green Energy

Account Administrator | Contract Administrator | Friday, October 18, 2013 | Logout

Browse Organizations | Browse Persons | Organization Templates | Person Templates | Search | Contract | Account | Settings | Favorites | Administration

Name is like:

Date Created between:  -

Date Last Modified between:  -

Maximum Number of Results:

0 Name Date Created Date Last Modified Created By

No items to display

Organizations

- Alfresco Ltd
  - Search for documents
  - Contracts
  - Master Agreements
- Green Energy
  - Search for documents
  - Contracts
  - Master Agreements
- Wind4Mill
- Hurricane Windmills
- Windmill Productions
- KeepWorking Service Company
- Windmill Maintenance
- Property4Lease Inc

The Account Administrator has access to the following pages:

- Browse Organizations
- Browse Persons
- Organization Templates  
Browse, add and work with "organization templates".
- Person Templates  
Browse, add and work with "persons".
- Search  
Select and execute searches

- Contract  
Browse and work with contracts
- Account  
Browse and work with accounts (i.e. to check terms and agreements)
- Settings  
Personal settings
- Favorites  
Access personal favorites

## Configuration and adaptation

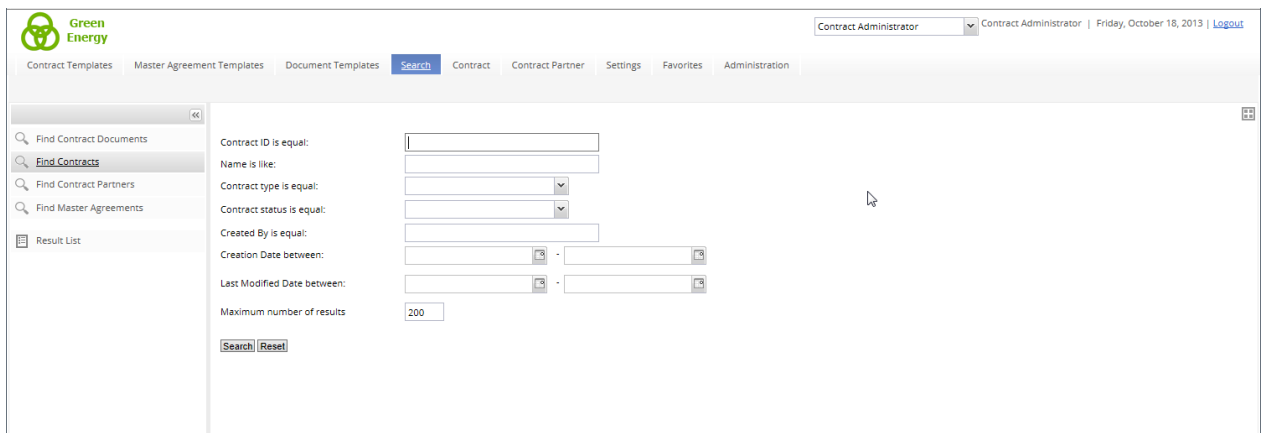
The Contract Management Solution Template provides many pre-configured Alfresco Workdesk features, which are listed in the following sections. Those pre-configured features can server as examples for how to further adapt the solution to customer needs

### Search Templates

In any Contract Management solution one must be able to search for contracts and the respective documents. The Solution Template delivers those two search templates in the `owsearchtemplates` folder of the Solution Template configuration set folder. The search templates are kept as generic as possible. If you are using a customized data model and your own properties related to your specific business cases, you can extend the existing search templates or create new search templates based on the exemplary ones.

Information on how search templates are used in Alfresco Workdesk in general can be found in the *Alfresco Workdesk Configuration and Planning guide* section *Search Templates*.

Search templates available to a business role will appear in the navigation pane to the left of the search page:



The screenshot shows the search interface of the Green Energy Contract Management Solution Template. The top navigation bar includes the Green Energy logo, a user dropdown menu (Contract Administrator), and the date (Friday, October 18, 2013). Below the navigation bar, there are tabs for Contract Templates, Master Agreement Templates, Document Templates, Search (active), Contract, Contract Partner, Settings, Favorites, and Administration. The search page features a left sidebar with a search icon and a list of search templates: Find Contract Documents, Find Contracts (selected), Find Contract Partners, Find Master Agreements, and Result List. The main search area contains several input fields for filtering results: Contract ID is equal to, Name is like, Contract type is equal to (dropdown), Contract status is equal to (dropdown), Created By is equal to, Creation Date between (date range), Last Modified Date between (date range), and Maximum number of results (set to 200). Search and Reset buttons are located at the bottom of the search area.

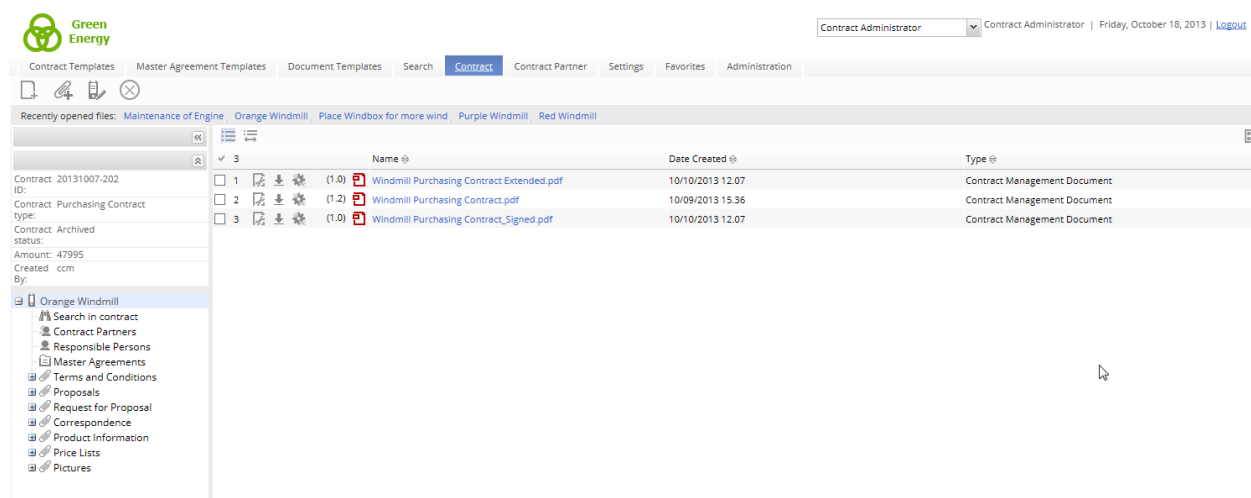
### Virtual Folder Templates

The key functionalities of any Contract Management solution are adding new contracts, opening existing contracts and searching for contract related documents. The Solution Template delivers virtual folder templates for those use cases in the `other` folder of the Solution Template configuration set folder. The search behavior for those templates and the properties that might be inherited from physical to virtual nodes are configured in the node

`<SemiVirtualRecordClasses>` in `owbootstrap.xml` in the configuration set folder. The virtual folder templates are kept as generic as possible. If you are using a customized data model and your own properties related to your own business cases, you can extend the existing virtual folder templates or create new virtual folder templates based on the exemplary ones.

Information on how virtual folder templates are used in Alfresco Workdesk in general can be found in the *Alfresco Workdesk Configuration and Planning guide* section *Electronic Files*.

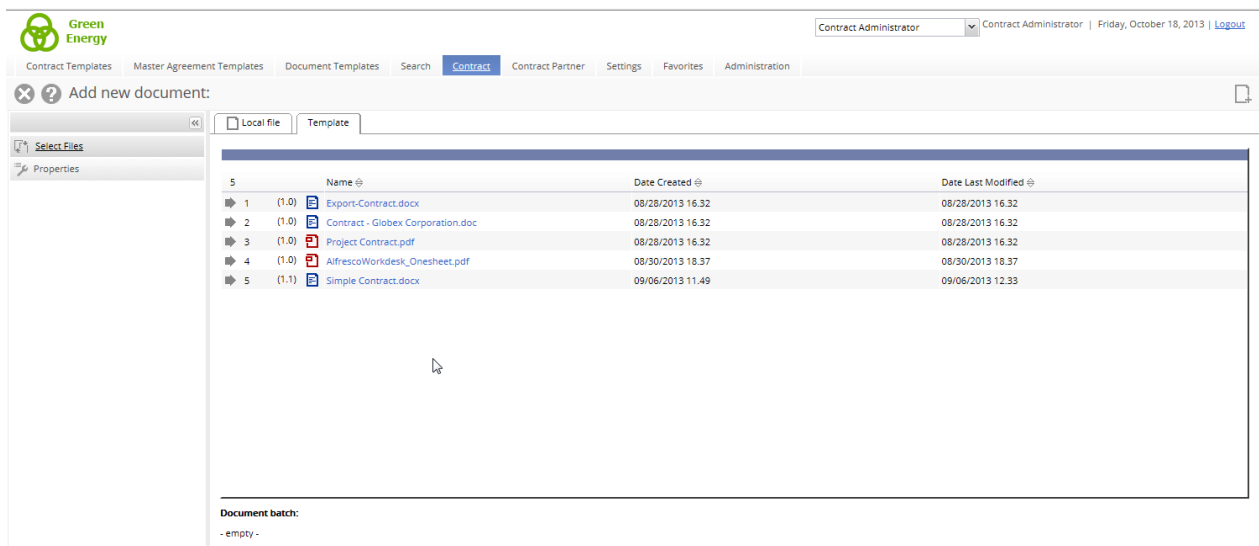
The virtual folder templates define the structures of the different contracts, with subfolders for different documents that comprise the whole contract. (Actually, clicking on a sub-folder just executes a search and its result is displayed as contents of this “folder”.) The screenshot below shows a contract with the respective virtual sub-folders:



## Document Templates

In order to facilitate adding new contract documents document templates are used instead of creating new document from scratch. To this end the Solution Template makes use of the standard “Add documents” function, with a new so called document importer (which defines a pre-configured Alfresco path in the background, where all the document templates are located) that allows the selection of a document template which is copied into the contract folder and serves as a starting point for the actual contract related document. The Solution Template provides some sample document templates, that can be used as blueprints for customer and project specific templates. When a new contract document is added to a contract, properties of the contract, e.g. the contract number, are inherited to the document’s metadata. If the contract document is a MS-Word document, Alfresco Office Workdesk will fill in these properties into fields in the document saving the user from doing this by hand.

The screenshot below shows the selection screen for the document templates.



## Field Controls

Another feature of Alfresco Workdesk used for the Solution Template are the so called Field Controls (see also section *Controlling Fields and their content* in Alfresco Workdesk Configuration and Planning guide). By utilizing Field Controls, the Field Manager processes field contents after they have been sent to the server. The definition of the field controls can be found in the node `<FieldControls>` in `owbootstrap.xml` of the contract management configuration set.

## Pre-defined Main Modules

The Contract Management Solution Template makes use of several Alfresco Workdesk main modules. The user can select these main modules from the line of horizontal tabs in the user interface. The most important ones and the ones related the most to Contract Management use cases are listed in this section. Of course there is the possibility to add additional modules depending on the solution use cases that have to be fulfilled.

## Intake

The module "Intake" (class `com.wewebu.ow.server.plugin.owrecord.OwRecordDocument`) is using a semi-virtual folder template to define an inbox folder structure listing contract documents located in the physical Alfresco folder configured as root folder `<StartupFolder>`. It displays documents that need to be worked on by currently logged-in user or that are assigned him. Additional properties can be used by the user to filter the list.

This module is used i.e. for assigning incoming scanned contract documents to existing contracts.

Green Energy Contract Manager | Contract Administrator | Friday, October 18, 2013 | Logout

Task Inbox | Browse Contracts | Browse Master Agreements | Search | Reports | Contract | Contract Partner | Settings | Favorites | Administration

Name is like:

Date Created is equal:

Date Created greater or equal:

Date Created less or equal:

Maximum Number of Results:

Left sidebar: ☒ Inbox, ☐ Find all Documents, ☐ My Inbox

Main area: 0 items. Columns: Name, Date Created, Object Type Id. Content: No items to display.

## Task Inbox

The “Task Inbox” ( class `com.wewebu.ow.server.plugin.owbpm.OwBPMDocument`) is used to display the Alfresco Activiti inbox and is listing the workflow tasks assigned to the currently logged in user. Users can start to work on their assigned tasks from there. Displaying the tasks in different colors based on their priority or other properties (please see also the sections *BPM* and *Highlighting* in the *Alfresco Workdesk Configuration and Planning guide* for further information on advanced BPM functionalities) makes it easy for the user to select the most important task and to organize his work.

Green Energy Contract Manager | Stefan Legal | Friday, October 18, 2013 | Logout

Task Inbox | Contract | Account

Left sidebar: ☒ Inbox (3)

Main area: Resubmission View

Description	Task Type	Date created	Comment
Legal Approval	Review	10/16/2013 12:37	Carla Contract 10/14/2013 15:22 Please review and approve, if ok.
Legal Approval	Review	10/16/2013 12:37	Carla Contract 10/14/2013 15:22 Please review and approve, if ok.
Legal Approval	Review	10/16/2013 12:37	Carla Contract 10/14/2013 15:22 Please review and approve, if ok.

## Browse Contracts

The module “Browse Contracts” (class `com.wewebu.ow.server.plugin.owrecord.OwRecordDocument`) is using a virtual folder template to define a contract overview based on a folder structure defined by the searches in the template. Users can edit existing contracts; they can add new contracts or even delete expired contracts if required.

Contract Manager
Contract Administrator | Friday, October 18, 2013 | [Logout](#)

Intake Task Inbox **Browse Contracts** Browse Master Agreements Search Reports Contract Contract Partner Settings Favorites Administration

Contract: 20131009-16  
ID:  
Contract: Service Technician Order  
type:  
Contract: Sent  
status:  
Amount: 2000

- Contracts
- Employment
- Windmill Contracts
  - Windmill Investor Contracts
- Purchasing Contracts
- Service Technician Contracts
  - Northern Region
    - Replacement of Engine
      - Search in contract
      - Contract Partners
      - Responsible Persons
      - Master Agreements
    - Payments
    - Correspondence
    - Scratch Bird from Wing
    - Maintenance of Engine
    - Repair Wind Control Unit
    - Place Windbox for more wind
  - Southern Region
  - Western Region
  - Eastern Region
  - Real Estate Contracts

	Name	Date Created	Type	Document status
<input type="checkbox"/> 1	(0.10) <a href="#">Statement of Work.docx</a>	10/09/2013 13:43	Contract Management Document	Sent
<input type="checkbox"/> 2	(1.4) <a href="#">Statement of Work.pdf</a>	10/09/2013 13:50	Contract Management Document	Sent

## Create Contract

The function “Create Contract” (class `com.wewebu.ow.server.plugin.owaddobject.OwAddObjectRecordFunction`) is used to create new contract objects. The contract types a user can choose from when creating a new contract are predefined by the business administrator.

Contract Manager
Contract Administrator | Friday, October 18, 2013 | [Logout](#)

Intake Task Inbox **Browse Contracts** Browse Master Agreements Search Reports Contract Contract Partner Settings Favorites Administration

×

Create Contract

Select Template

Properties

5

	Name	Description	Creation Date	Last Modified Date
1	<a href="#">Purchasing Contract</a>	Template for Windmill Purchasing	10/07/2013 08:43	10/17/2013 17:44
2	<a href="#">Investor Contract</a>	Template for Windmill Investor	10/07/2013 10:02	10/07/2013 14:26
3	<a href="#">Service Contract</a>	Service Technician Order Contract	10/07/2013 10:48	10/09/2013 13:39
4	<a href="#">General Supplier Contract</a>		10/10/2013 13:40	10/10/2013 13:52
5	<a href="#">Employment Contract</a>	Employment Contract	10/14/2013 08:54	10/14/2013 08:55

Next

32 Contract Management Solution Template



**Create Contract**

**General**

Name: Service Windmill

Description: Service Technician Order Contract

Contract ID: 20131018-88

Contract type: Service Technician Order

Contract status: New

Expiration Date: 01/30/2015 00:00

Note: +

**Amount**

Amount: 20.000

Currency: USD (United States Dollar)

**Agreement Dates**

Valid From: 11/01/2013 00:00

Valid Until:

**Region**

Region:

Country:

## Search

The module “Search” (class `com.wewebu.ow.server.plugin.owsearch.OwSearchDocument`) lists all the search templates to search for contracts and contract documents (see also section *Search Templates*).

The following screen shows a typical search result screen:

**Search Results**

Save the search as: [ ] [Save]

Results for Search: Find Contracts

		Name	Contract type	Contract status	Contract ID	Creation Date	Created By	Last Modified Date
<input checked="" type="checkbox"/>	1	Blue Windmill	Purchasing Contract	New	20131007-201	10/07/2013 09:05	ccm	10/10/2013 12:06
<input type="checkbox"/>	2	Carla Contract	Employment	New	20131014-55	10/14/2013 09:43	ccm	10/14/2013 09:43
<input type="checkbox"/>	3	Harry Human	Employment	Effective	20131014-57	10/14/2013 09:50	ccm	10/14/2013 09:50
<input type="checkbox"/>	4	Maintenance of Engine	Service Technician Order	New	20131010-20	10/10/2013 08:26	ccm	10/10/2013 08:36
<input type="checkbox"/>	5	Martin Manager	Employment	New	20131014-54	10/14/2013 09:39	ccm	10/14/2013 09:39
<input type="checkbox"/>	6	Orange Windmill	Purchasing Contract	Archived	20131007-202	10/07/2013 09:13	ccm	10/10/2013 12:07
<input type="checkbox"/>	7	Peter Worker	Employment	Effective	20130913-25	09/13/2013 16:51	Administrator	10/11/2013 19:18
<input type="checkbox"/>	8	Pink Windmill	Purchasing Contract	Effective	20131007-199	10/07/2013 09:02	ccm	10/10/2013 12:06
<input type="checkbox"/>	9	Place Windbox for more wind	Service Technician Order	New	20131010-22	10/10/2013 08:59	ccm	10/10/2013 17:11
<input type="checkbox"/>	10	Purple Windmill	Purchasing Contract	New	20131007-215	10/07/2013 14:41	ccm	10/10/2013 12:07
<input type="checkbox"/>	11	Red Windmill	Purchasing Contract	Effective	20131007-203	10/07/2013 09:15	ccm	10/10/2013 12:07
<input type="checkbox"/>	12	Repair Wind Control Unit	Service Technician Order	New	20131010-21	10/10/2013 08:28	ccm	10/10/2013 08:36
<input type="checkbox"/>	13	Replacement of Engine	Service Technician Order	Sent	20131009-16	10/09/2013 13:43	ccm	10/09/2013 17:09
<input type="checkbox"/>	14	Scratch Bird from Wing	Service Technician Order	New	20131009-18	10/09/2013 17:44	ccm	10/10/2013 08:37
<input type="checkbox"/>	15	Stefan Legal	Employment	New	20131014-53	10/14/2013 08:58	ccm	10/14/2013 08:58
<input type="checkbox"/>	16	Yellow Windmill	Purchasing Contract	Pending	20131007-198	10/07/2013 09:00	ccm	10/10/2013 12:05

## Contract

The page “Contract” (class `com.wewebu.ow.server.plugin.owrecord.OwRecordDocument`) is used to open a specific contract and the contained documents. Users can edit, add or delete contract documents from there. The folder structure of any contract is again based on the respective contract template.

The screenshot shows the Green Energy Contract Manager interface. The top navigation bar includes 'Intake', 'Task Inbox', 'Browse Contracts', 'Browse Master Agreements', 'Search', 'Reports', 'Contract', 'Contract Partner', 'Settings', 'Favorites', and 'Administration'. The 'Contract' tab is active. Below the navigation bar, there's a section for 'Recently opened files' with tabs for 'Maintenance of Engine', 'Orange Windmill', 'Place Windbox for more wind', 'Purple Windmill', and 'Red Windmill'. The 'Maintenance of Engine' tab is selected, showing a list of documents. On the left, there's a sidebar with a tree view containing 'Maintenance of Engine', 'Search in contract', 'Contract Partners', 'Responsible Persons', 'Master Agreements', 'Payments', and 'Correspondence'. The main area displays a table of documents for the selected contract.

	Name	Date Created	Type
Contract: 20131010-20 ID: Contract: Service Technician Order type: Contract: New status: Amount: 1490 Created: com By:	1 (1.0) SOW_11122013.docx	10/10/2013 08:36	Contract Management Document
	2 (1.0) SOW_11122013.pdf	10/10/2013 08:36	Contract Management Document
	3 (0.1) Statement of Work.docx	10/10/2013 08:26	Contract Management Document

## Add Contract Documents

The function "Add Contract Documents" (class `com.wewebu.ow.server.plugin.owaddmultidocuments.OwAddMultipleDocumentsRecordFunction`) is used to add new documents to existing contracts. The document types a user can choose from when creating a new contract document are defined in the `<ObjectClassSelection>` configuration. By utilizing two different `<Importer>` configuration nodes, users can either upload a document from their local hard drive or can select from several document templates. Of course, these pre-configured templates are stored in the Alfresco repository (see also section *Document Templates*).

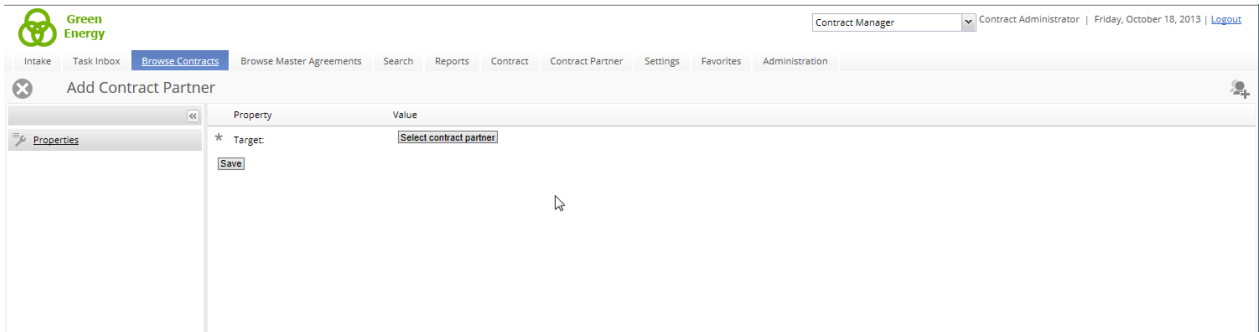
The screenshot shows the 'Add new document' dialog in the Green Energy Contract Manager. The dialog has a title bar with a close button and a question mark. Below the title bar, there are two tabs: 'Local file' and 'Template'. The 'Template' tab is selected. On the left, there's a sidebar with a tree view containing 'Select Files' and 'Properties'. The main area displays a table of document templates.

	Name	Date Created	Date Last Modified
1 (1.0)	Export-Contract.docx	08/28/2013 16:32	08/28/2013 16:32
2 (1.0)	Contract - Globex Corporation.doc	08/28/2013 16:32	08/28/2013 16:32
3 (1.0)	Project Contract.pdf	08/28/2013 16:32	08/28/2013 16:32
4 (1.0)	AlfrescoWorkdesk_Onesheet.pdf	08/30/2013 18:37	08/30/2013 18:37
5 (1.1)	Simple Contract.docx	09/06/2013 11:49	09/06/2013 12:33

Document batch:  
- empty -

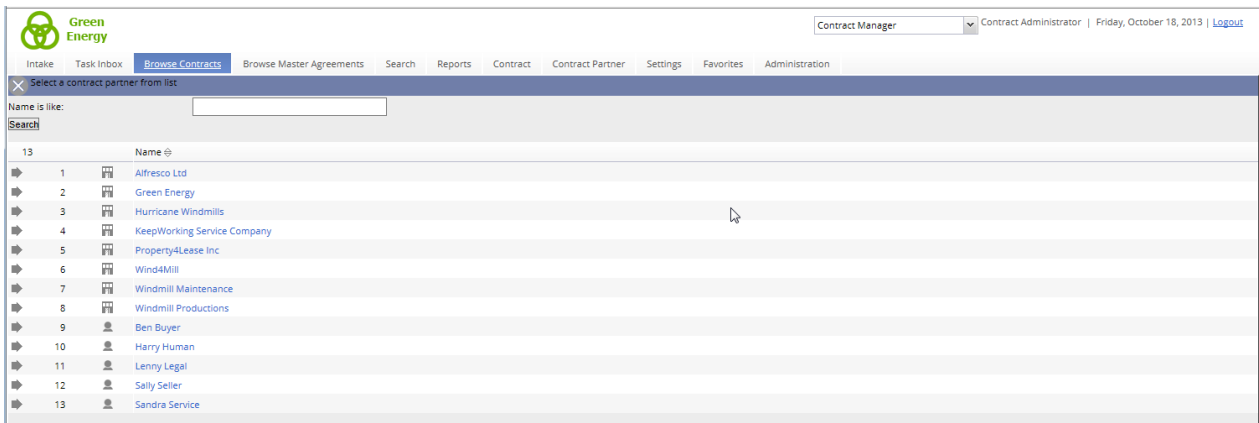
## Add Contract Partner

The function “Add Contract Partner” (class `com.alfresco.ow.server.plugin.owaddobject.OwDocumentFunctionVFAddObject`) is used to add a “relationship” object, which links a contract object as source object and the corresponding contract partner (type configured in node `<ObjectClassSelection>`) as target object.



The screenshot shows the 'Add Contract Partner' form. The 'Properties' tab is active, showing a table with one row: 'Target' with the value 'Select contract partner'. A 'Save' button is located below the table. The top navigation bar includes 'Intake', 'Task Inbox', 'Browse Contracts', 'Browse Master Agreements', 'Search', 'Reports', 'Contract', 'Contract Partner', 'Settings', 'Favorites', and 'Administration'. The user is logged in as 'Contract Administrator' on Friday, October 18, 2013.

Using the button “Select Contract Partner” searches for all available Partner objects in the system and lets the Contract Manager select the partner for a contract. This functionality is provided in fact by a Field Control (see section *Field Controls*).



The screenshot shows the 'Select contract partner from list' dialog. It has a search bar with the text 'Name is like:' and a 'Search' button. Below the search bar is a list of 13 items, each with a checkbox and a name. The items are: 1. Alfresco Ltd, 2. Green Energy, 3. Hurricane Windmills, 4. KeepWorking Service Company, 5. Property4Lease Inc, 6. Wind4Mill, 7. Windmill Maintenance, 8. Windmill Productions, 9. Ben Buyer, 10. Harry Human, 11. Lenny Legal, 12. Sally Seller, 13. Sandra Service. The top navigation bar is the same as in the previous screenshot.

## Reports

The module “Reports” (class `com.alfresco.ow.server.plugin.owreport.OwReportDocument`) is used to search for contracts and contract documents using different search templates located under the path defined in the node `<SearchTemplatesName>` and displays graphical representations of the search results, e.g. pie charts or columns.

Remark: this is only a sample how to integrate reporting functionality and the features are limited.

Green Energy Contract Manager | Contract Administrator | Friday, October 18, 2013 | [Logout](#)

Intake Task Inbox Browse Contracts Browse Master Agreements Search **Reports** Contract Contract Partner Settings Favorites Administration

Contract Termination Report

Contract Status Report

Report

Contract type is equal:  x v

Contract status is equal:  v

Amount greater or equal:

Amount less or equal:

Currency is equal:  v

Region is equal:  v

Country is equal:  v

Valid From between:  s -  s

Creation Date between:  s -  s

Maximum number of results:

[Create Report](#) [Reset](#)

Green Energy Contract Manager | Contract Administrator | Friday, October 18, 2013 | [Logout](#)

Intake Task Inbox Browse Contracts Browse Master Agreements Search **Reports** Contract Contract Partner Settings Favorites Administration

Contract Termination Report

**Contract Status Report**

Report

Creation Date between:  s -  s

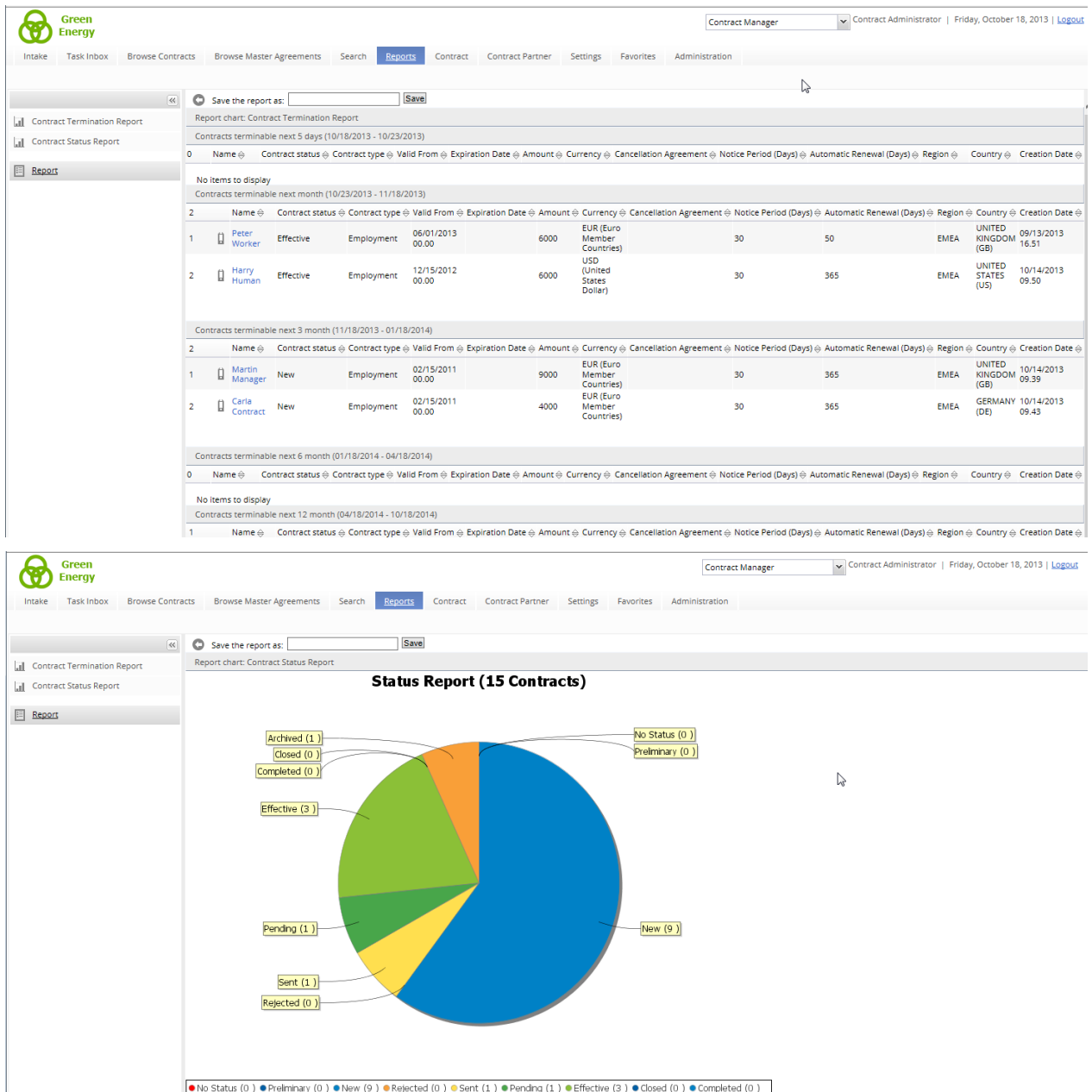
Contract type is equal:  v

Created By is equal:

Maximum number of results:

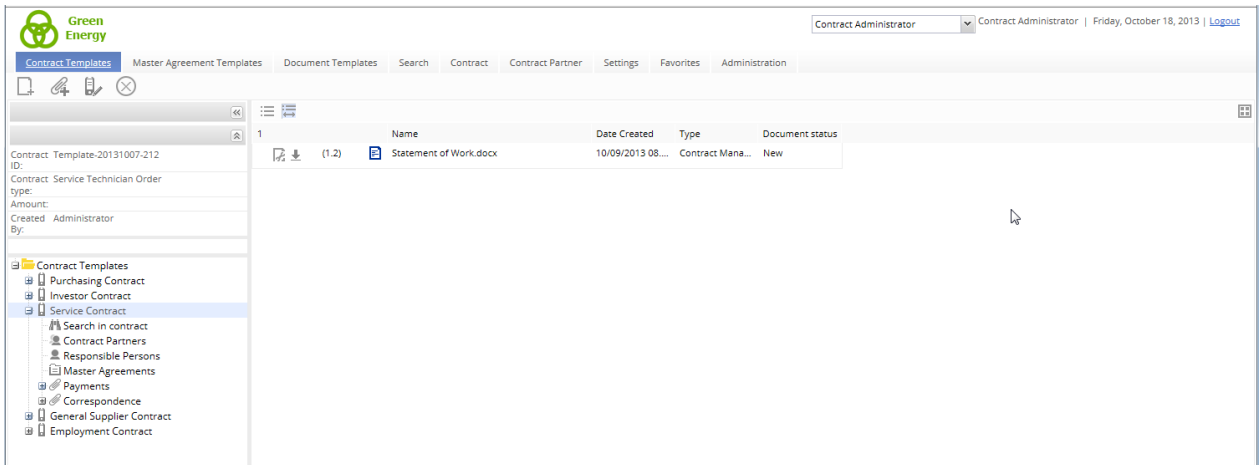
[Create Report](#) [Reset](#)

The search results are displayed as graphs based on property values as defined in the corresponding search template in the node `<reportprops>`. Exemplary reporting search templates can be found in the Contract Management Solution Template bundle under `C:/AlfrescoContractManagement/ABS/config/Workdesk/ContractManagement/owreport templates`.



## Contract Templates

The module “Browse Contract Templates” (class `com.wewebu.ow.server.plugin.owrecord.OwRecordDocument`) is used to browse through, edit and create contract templates.

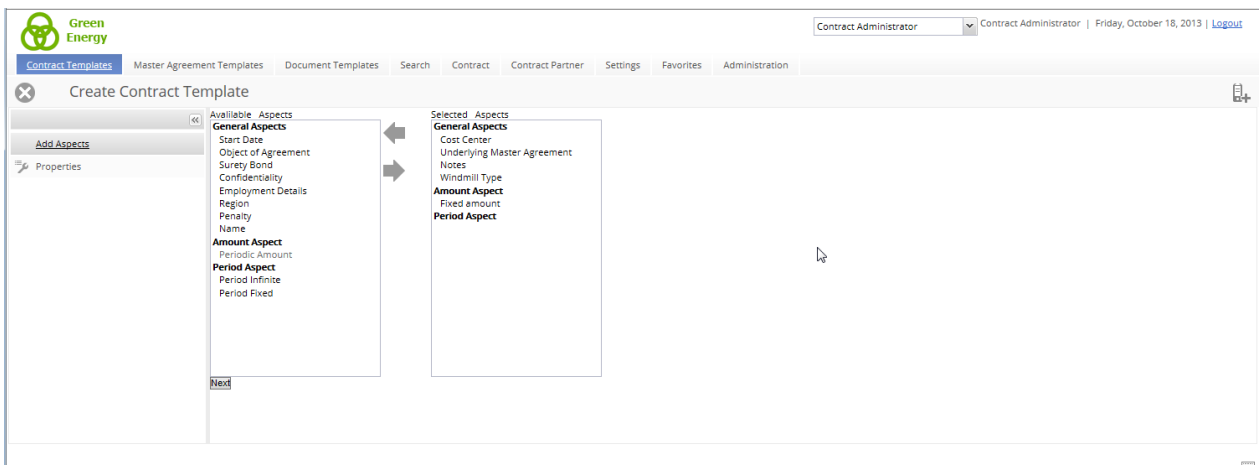


## Create Contract Template

The function “Create Contract Template” (class `com.wewebu.ow.server.plugin.owaddobject.OwAddObjectRecordFunction`) is used to create new contract templates from which a user later can select one when he wants to create a new contract (see section *Create Contract*). The contract template types are defined in the `<ObjectClassSelection>` configuration node and contract administrators can only create contract templates from the type defined in this node.

See in the following the steps necessary to create a new contract template:

By configuring the node `<AspectsAssociations>` it is possible to configure Aspects properties that are attached to the contract template depending on the selected contract type. Using the `<DialogHandler>` (class `com.alfresco.ow.server.plugin.owrecordext.OwCreateContractDialogAddAspects`) enables the contract administrator to select only mandatory Aspects properties for each contract template, whereas all Aspect properties available from the `<AspectsAssociations>` node can be added to groups using the subnode `<AssociationGroup>`:



See in the following screenshot how to assign values to the selected properties:

**Create Contract Template**

Property	Value
<b>General</b>	
Name:	Customer specific Contract Template
Description:	
Contract ID:	Template-20131018-90
Contract type:	Purchasing Contract
Contract status:	Preliminary
Expiration Date:	
Cost Center ID:	
Note:	
<b>Amount</b>	
Amount:	
Currency:	
<b>Windmill Type</b>	
Windmill Model:	
Engine Power (kw):	

[Save](#)

## Document Templates

The module “Browse Document Templates” (class `com.wewebu.ow.server.plugin.owrecord.OwRecordDocument`) is used to browse, edit and create new document templates from which a user later can select one when he wants to create a new contract document.

	Name	Date Created	Type
1	AlfrescoWorkdesk_Onesheet.pdf	08/30/2013 18.37	Contract Management Document
2	Contract - Globex Corporation.doc	08/28/2013 16.32	Contract Management Document
3	Export-Contract.docx	08/28/2013 16.32	Contract Management Document
4	Project Contract.pdf	08/28/2013 16.32	Contract Management Document
5	Simple Contract.docx	09/06/2013 11.49	Contract Management Document

## Create Contract Template

The function “Create Contract Template” is used to create new document templates from which a user later can select one when he wants to create a new contract document.

The screenshot shows the 'Green Energy' web application interface. At the top, there's a navigation bar with the logo and user information: 'Contract Administrator' and 'Friday, October 18, 2013 | Logout'. Below this is a menu bar with options: 'Contract Templates', 'Master Agreement Templates', 'Document Templates' (highlighted), 'Search', 'Contract', 'Contract Partner', 'Settings', 'Favorites', and 'Administration'. The main content area is titled 'Add new document: Confidentiality Agreement.pdf'. It features a 'Select Files' button and a 'Properties' tab. The 'Properties' tab is active, showing a table with 'Property' and 'Value' columns. The table contains the following entries:

Property	Value
Name:	Confidentiality Agreement.pdf
Document type:	
Document status:	

At the bottom of the form, there is a 'Create Release Version' dropdown menu and a 'Save' button.

## Alfresco Folder Structure

The Contract Management Solution Template comes already with a ready to use pre-defined folder structure in the Alfresco repository.

## Activiti Workflows

The Contract Management Solution Templates comes with all Activiti workflow definitions and corresponding task models needed to implement the typical Contract Management processes (see section Contract lifecycle). All required process definitions and the Activiti task model are pre-configured and are coming with the Contract Management Solution Template. Depending on the business use cases those processes and models can be extended.



## Future Plans

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Alfresco 4.2 (including Workdesk) will bring some new features that will help us to round-up the Contract Management Solution Template.

### Activiti Workflow

AlfrescoOne 4.2 will contain many improvements and enhancements of the Activiti API. We shall use them in order to improve the workflow based functionalities of the Solution Template.

Here is an outlook on the new features planned in Alfresco Workdesk 4.2:

- Enhanced Case Files
  - Tasks & Workflows available in a virtual Folder
  - Nested Case Files
  - Dynamic virtual Folders
- Activiti
  - Public Workflow API (no support for jBPM engine)
  - Improved searching & filtering of tasks
  - Business role based workflow
  - Dynamic assignee on initiate & Proxies
- Basic Reports & Charts
  - Improved Configuration

All these features are relevant and important for the Contract Management Solution Template!

Especially the implementation of activities as described in chapter *Contract Management for sales and purchasing* will be considerably improved as soon as Alfresco Workdesk 4.2 will be available.

Here a list of the improvements planned for the Contract Management Solution Template as it will be delivered with Alfresco Workdesk 4.2:

- Business role specific inbox view
  - All contract management related business roles have their business role based view of the inbox.
- Workflow selection list
  - Every business role can only select the workflows relevant in a certain step of the contract lifecycle
- Configurable reports
  - We will replace the fixed reports in the existing Solution Template with the configurable reports.

## Records Management

The execution of a contract often is supported or driven by typical Records Management functions. It is planned to support Alfresco Records Management 2.1 with Alfresco Workdesk 4.2.

- Leverage „Inplace Records“ - Link to the Fileplan
- Create Record
- Utilize Rules & Actions, e.g. add an Aspect
- Display Record data (e.g. Retention, Classification, ...)
- Display a Records View

With Alfresco Workdesk 4.2 all these functions will be also available for the Contract Management Solution Template.

## Data Lists

Today data lists have to be adapted directly in the XML files of the underlying Alfresco data model. With Alfresco Workdesk 4.2 it is planned to make the configuration more comfortable.

## A1. Contract Management Data Model

