**Emptoris Contract Management & Sourcing:**

**Implementation Workshop Agenda**

**Remote via Blackboard Collaborate, October 28 - November 1, 2013**

**Note:**  The scheduling of specific topics from the original 5-day (Contracts) and 3-day (Sourcing) workshops has not been adjusted in this combined 5-day agenda.

**Day 1: Introduction of Emptoris, Contract Management, and Sourcing; Contract Management Application Administration**

**Pre-workshop testing of system access, etc.**

**Workshop Goals, Overview, and Agenda**

**Welcome and Introduction = 1.00 Workshop Overview.ppt**

**= 1.00a Workshop Agenda 10-28-2013.docx**

**Emptoris and Contracts / Project Overview = 1.01 ECM Overview and Project Planning Intro.ppt**

**Emptoris and Sourcing Overview = 1.01 Emptoris and Sourcing Overview.ppt**

**Discussion of Test System** (organizations and users) = Emptoris Test System Notes.doc

For reference only: 1.01a Contract Mgmt Sales Overview.ppt

**Contracts: Application Administration**

**Configure Browser and Microsoft Word = 1.02 Emptoris ECM V10.x Setup.docx**

(If using the Education training system, this should already be set up, so this file is more for later reference, when using a personal laptop as Contract Management client)

**Overview of ECM Web Portal, Navigation = 3.02 Contracts\_Navigation.ppt**

**Creating Business Terms = 1.03 ECM Sys Admin – Terms**

System Terms

Language / Tracking Terms

**Creating Clause Templates = 1.04 ECM Sys Adm-Clause Template Configuration**

Format Templates

**Creating Contract Templates = 1.05 ECM Sys Adm-Contract Template Configuration**

**ECM and SSM-VSM Relationship = 1.06 ECM and SSM-VSM.pptx**

**Managing Users = 1.07 ECM Sys Adm-Parties and Security**

My Company

External Companies

Addresses

Security Manager

Individual Users

User Groups

Permission Groups

**Exercise 2.05a** (Contract Breakdown) can be done at this point or on Day 2

**Day 2: Contracts Application Administration, cont.**

**Configuration = 2.01 ECM Sys Adm Configuration-Notify Approve Value UI**

Approvals

Events

Notification Templates

Value Lists

Line Definitions and related concepts (Data Domains, Data Definitions, ...)

User Interface

**Master Files – 2.02 ECM Sys Adm Master Files**

Products

Price List

Currencies

Relationship Types

(Former file 2.03 was merged with 1.07)

**Application – 2.04 ECM Sys Adm Application Settings**

System Settings

Process Schedules

**EXERCISES – 2.05a – Design Exercise (Contract Breakdown**), if not done earlier

**2.05b - Config Exercise (second half can be left for after Day 3)**

**2.05c - Format Template Exercise**

**At this point we will probably jump to the Sourcing topics further below, then return to Contract Management.**

**Day 3: Contracts Application Standard Usage**

**Standard User Introduction = File 3.01**

**Navigation (if not covered earlier) = File 3.02**

**Searching the Repository = File 3.03**

Repository Search

Advanced Repository Search Features

Using Personal Folders

Running Standard Reports

**Initiating a Contract from a Wizard = File 3.04**

**Initiating a Contract from a Template = File 3.05**

**Other Contract Authoring Methods = File 3.06**

Initiating a Received Contract

Initiating a filed Contract

Initiating a contract using Save A**s**

**Contract Properties = Files 3.07-3.12**

Using the ECM Contract Editor

Header

Modifying the Internal and External Parties

Modifying Contract Term

Attaching a Document

Modifying Language Terms and Text

**Collaborative Reviews Approvals and Presentation Etc. = Files 3.13-3.22**

Requesting a review

Management Tab

Comparing Contract Revisions

Presenting for Negotiation

Check Out and Check In = File 3.16

Initiating Approvals

Approving a Contract

Viewing tasks

Updating Sub Status

Sending Notifications = File 3.21

Managing Relationships (incl. Amendments), Management Tab features = File 3.20

Executing a Contract

**Managing Active Contracts = File 3.23**

Managing Active Contracts

Amending an Active Contract

**Day 4: Contracts Implementation and Other**

###### Implementation Project Overview = 4.01 ECM Implementation.pptx

###### Scope of Work

###### Kickoff Meeting

###### Implementation phases

**Interview Wizard Design = 4.02 Interview Wizard Design.ppt**

**Bulk Load Utilities (incl. SSM-VSM) = 4.03 Bulk Load Utilities.ppt**

**Web Services and User Exits = 4.04 Web Services and User Exits.ppt**

**Day 5: Contracts Implementation and Other, cont.**

**(Likely completion of presentations from previous days)**

**Completion of Exercises, ad hoc testing**

**Sourcing ... Day 1: Terminology/Concepts; RFI**

**Concepts and Terminology = 1.02 Sourcing Concepts and Terminology.pptx**

**Buyer Navigation: = 1.03 Buyer Navigation.ppt**

**Day 2: RFQ; RFP; Buyer Surveys; Administration**

**Requests for Information (RFIs) = 1.04 Sourcing RFI.ppt**

RFI Overview

Configuring an RFI (creating Questionnaires and Questions)

Weighting and Scoring

Adding Questions

Inviting Suppliers and the Host Team

Scheduling the Event Event Summary

Responding to RFI’s

Monitoring and Scoring RFI’s

**Discussion of Case Studies = Freight\_Case\_Study.doc, Hotels\_Case\_Study.doc**

**Request for Quote (RFQ) =** **2.01 Sourcing RFQ.ppt**

RFx Wizard creation of an RFQ

Creating Lots, Item Attributes, and Items

Bid Fields

Bidding Rules

Bidding on an RFQ

Monitoring an RFQ

**Request for Proposal (RFP) and Buyer Surveys = 2.02 RFP and Buyer Surveys.ppt**

Overview of RFP

Supplier Responses to an RFP

Monitoring and Analyzing an RFP

**Administration = 2.03 Administration.ppt**

Setting up a new Sourcing system

Operational tasks

**Day 3: Auctions; Reporting, Analytics, Sourcing Desktop Intelligence**

**Qualification Test distribution**

**Auctions = 3.01 Auctions.ppt**

Overview of Auctions

Using RFQ values as a starting point

Auction Rules

Placing a Bid in an Auction

Reporting

Monitoring your Auction

Analyzing Auction Results

**Reporting, Analytics, Sourcing Desktop Intelligence = 3.02 Reporting, Analytics, SDI.ppt**

**Completion of Exercises; ad hoc testing**

**Summary and Wrap-up**