Sourcing- Contract Actions
User Training Guide

September 2018

Contract Actions

The Contract Database will be set up to allow a number of activities at certain points within the contract lifecycle. These activities are explained below.

Status: Initial Creation

When creating a new contract not yet submitted for approval, the status displayed in the Contract Details tab will be **Initial Creation**.

The contract at the Initial Creation stage will have the following Contract Actions available:

- **Edit Contract:** Allows user to amend any of the fields within the Contract Details tab.
- **Send for Approval:** Allows user to send the contract record for approval. The status will change to Awaiting Approval.
- **Delete Contract:** Allows user to delete the contract which is at the Initial Creation stage. Once a contract has been sent for approval, the deletion option will no longer be available.
- **Copy Contract:** Allows user to create a new contract by using the existing contract as a template to pre-populate the new contact record.

Status: Approved

The contract that has gone through the approval stage will display the Approved status.

The contract with the Approved status will have the following Contract Actions available:

- **Edit Contract:** Allows user to amend some of the fields.
- **Suspend Contract:** Allows user to suspend, being temporally unavailable for use.
- **Terminate Contract:** Allows user to terminate manually, end the contract before it's expected end date.
- **Delete Contract:** Allows user to delete the contract, note that only during the early stages of creation.
- **Copy Contract:** Allows user to create a new contract by using this contract as a template to pre-populate some metadata fields.

Status: Failed Approval

If the approver has rejected the contract, the status of the contract displayed will be **Failed Approval**.

Once the contract has Failed Approval, you can perform the following actions to the contract record:

- **Edit Contract:** Allows user to amend any of the fields.
- **Send for Approval:** Allows user to send for approval, the status will change to Awaiting Approval.
- **Copy Contract:** Allows user to create a new contract by using the current contract as a template to pre-populate some metadata fields.

Status: Effective

Once your contract is active, the status of the contract is Effective.

Once the contract is Effective, you can perform the following actions to the contract record:

- **Edit Contract:** Allows user to amend some of the fields.
- **Suspend Contract:** Allows user to suspend, being temporally unavailable for use.
- **Terminate Contract:** Allows user to terminate manually end the contract before it's expected end date.
- **Copy Contract:** Allows user to create a new contract by using this contract as a template to pre-populate.
- **Contract Variation:** Allows user to create a variation of this contract. The details from this contract will be pre-populated on to the new contract.
- **Renew Contract:** Allows user to create a new contract to replace this contract. Once the new contract becomes effective this contract will automatically terminate.

Status: Terminated

If the contract has been terminated, the status of the contract is Terminated.

Once the contract is Terminated, you can perform the following actions to the contract record:

- **Copy Contract:** Allows user to create a new contract by using this contract as a template to pre-populate some metadata fields.
- **Renew Contract:** Allows user to create a new contract to replace the existing one. Once the new contract becomes effective, this previous contract will terminate automatically.

Status: Ended

If the contract has ended, the status of the contract displayed is Ended.

Once the contract has Ended, you can perform the following actions to the contract record:

- **Copy Contract**: Allows user to create a new contract by using this contract as a template to pre-populate some metadata fields.
- **Renew Contract:** Allows user to create a new contract to replace the ended contract. Once the new contract becomes effective the previous contract will automatically terminate.