

Create a Contract

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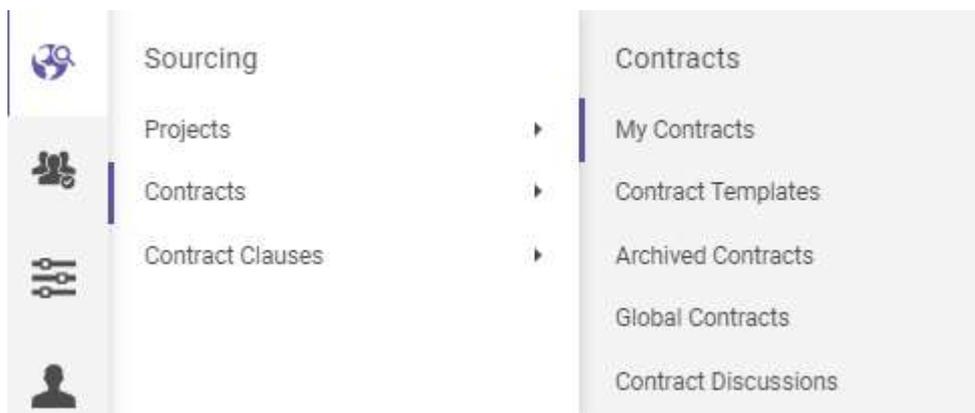
Create a Contract

When to use this process:

- ✓ I have a new contract/variation signed by all parties
- ✓ I want to enter it into the contract management system as an active entry, and set up any alerts/notifications
- ✓ The supplier is an existing supplier (refer to New Supplier Form process if this is a new supplier to Endeavour)

Getting Started

1. From the main page (Dashboard) click on the  (world symbol with the magnifying glass)
2. Click on Contracts, My contracts



3. This will open up a list of all contracts visible to you
 - a. The search function defaults to all contracts. You can click on the down arrow to view expired only or active only etc.



 [Create Contract](#) ▾

4. Click on Create Contract and select from template

Each contract template has a rule sitting behind it generating questions, approvals etc.



Icon	ID	Title	Description	Active	Visible	Filter	Contract Type	WCD	Class Code
1	100_01	CCC Template - Master Contract Doc - No obligation		Yes	No	Commercial Customer Contracts	2: Commercial Customer Contracts	Yes	0
2	100_01	CCC - Master contract Doc - No obligation		Yes	No	Commercial Customer Contracts	2: Commercial Customer Contracts	Yes	0
3	100_02	CCC Template - Master Contract Doc - No obligation		Yes	No	Commercial Customer Contracts	2: Commercial Customer Contracts	Yes	0
4	100_04	Supplier Contracts - Template - No Master Contract Doc, No obligation		Yes	No	Supplier	1: Supplier Contracts	Yes	0
5	100_07	Supplier Contracts - Template - Master Contract Doc, No obligation		Yes	Yes	Supplier	1: Supplier Contracts	Yes	0
6	100_08	Supplier Contracts - Template - Master Contract Doc - No obligation		Yes	No	Supplier	1: Supplier Contracts	Yes	0

If you are in Sales & Marketing and the B2B department (with Clint Carlson and Paul Gunn) you will always select CCC ... templates

If you are in any other area of Endeavour, then select from Supplier Contracts.

Create a Contract

Con-5 is the main template to select in this scenario (contract already signed and required to be loaded).

Procurement team will use con_7 and con_8 as this generates contracts within the system and internal approvals as well as eSignature to the supplier and ELT within Endeavour.

Click on the circle for con_5 and click the green select button 

Page 1

Mandatory fields are noted with a red *

All fields should be completed even if not mandatory as the more information entered the more detailed reporting can be produced.

Originating Code -> This is the code for the contract template you used to create the new entry

5. Title (mandatory) – this is free text, type in here the name of the contract eg: Master Agreement for the Provision of Goods, Services and Deliverables

In this scenario don't choose "Copy Original Title" 

6. Project Code (mandatory) – click on "select Project" and select the appropriate area the contract relates to

Code	Type	Description	Status
prj_9	Lotteries	Linked to Supplier Contracts used for the Lotteries team only	Open Code
prj_8	General Supplier Agreement	Linked to Supplier Contracts, except if contract is a lease or license	Open Code
prj_10	Leases	Linked to Supplier Contracts, used by FM only for lease agreements	Open Code
prj_11	Commercial Customer Contracts	Linked to Commercial Customer Contracts, Sales & Marketing team	Open Code
prj_12	Community Solutions Group	Linked to Supplier Contracts, used by all CSOs under the CSO contract SL 9999 etc	Open Code

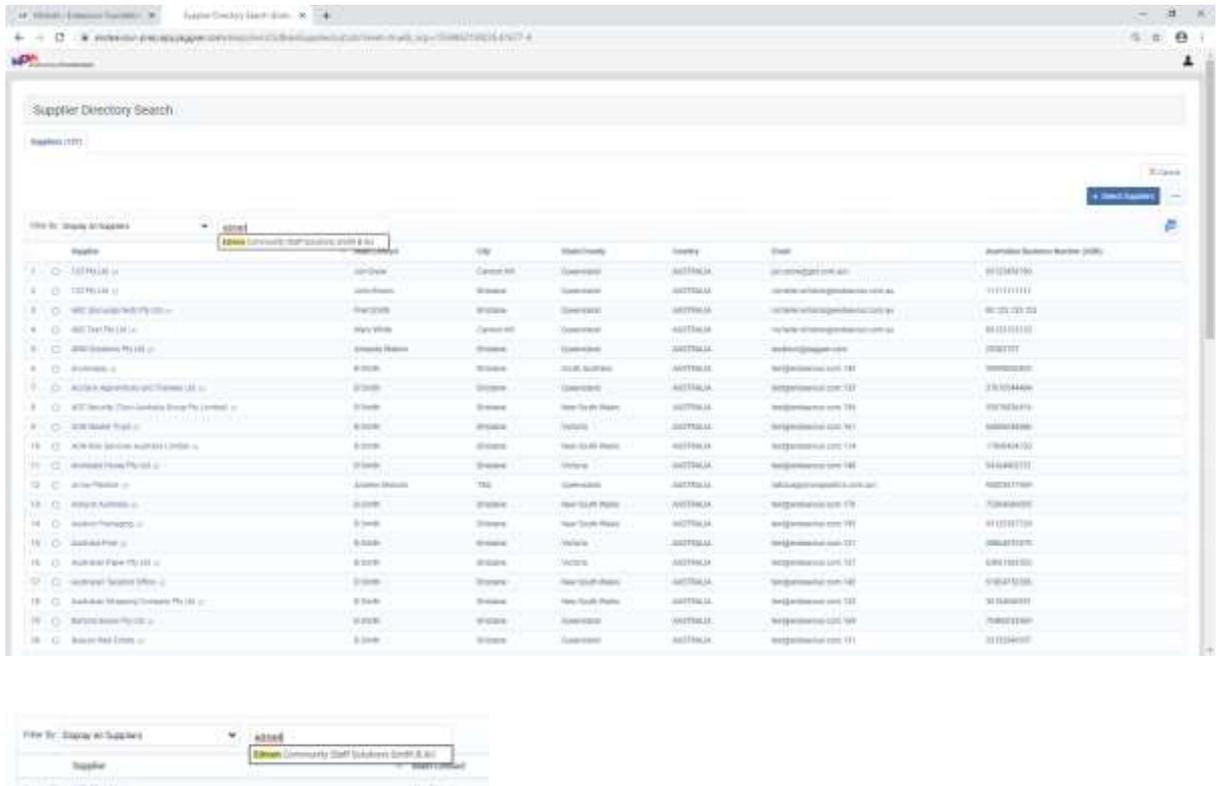
- prj_9 Lotteries is a project line set up specifically for the Lotteries team prize contracts (purchasing land, house builds, purchase of boats, cars, gold bullion etc)
- prj_8 General Supplier Agreement is the most commonly used project line for all areas of the business, this is for all supplier agreements/amendments/letters etc
- prj_10 Leases is a project line set up specifically for the Asset Management team
- prj_11 Commercial Customer Contracts is specifically set up for the Sales & Marketing (B2B department (with Clint Carlson and Paul Gunn) for all agreements etc relating to revenue
- prj_12 Community Solutions Group is set up specifically for the CSG team and subsidiaries

Create a Contract

Select

Click on the circle for the appropriate project and click the green select button

- Main Contractor (should be mandatory) this is the supplier name.
Click on “select main contractor” all current approved suppliers are loaded into the list, you can start typing in the name of the supplier and if in our system it will show up.



+ Select Suppliers

Click on the circle for the correct supplier and click the green select button

Note: the suppliers have been entered in with their correct legal name and ABN. This sometimes may not match but should, the contract or previous entries.

Action: if your supplier is not on the list you need to...

You can only select one supplier per contract number –

- Reference (not mandatory), we suggest you use this field for putting in the name of the Endeavour business contact (name)
- Contract Type (mandatory)

* Contract Type

1. Supplier Contracts

Create a Contract

* Contract Type

2. Commercial Customer Contracts ▼

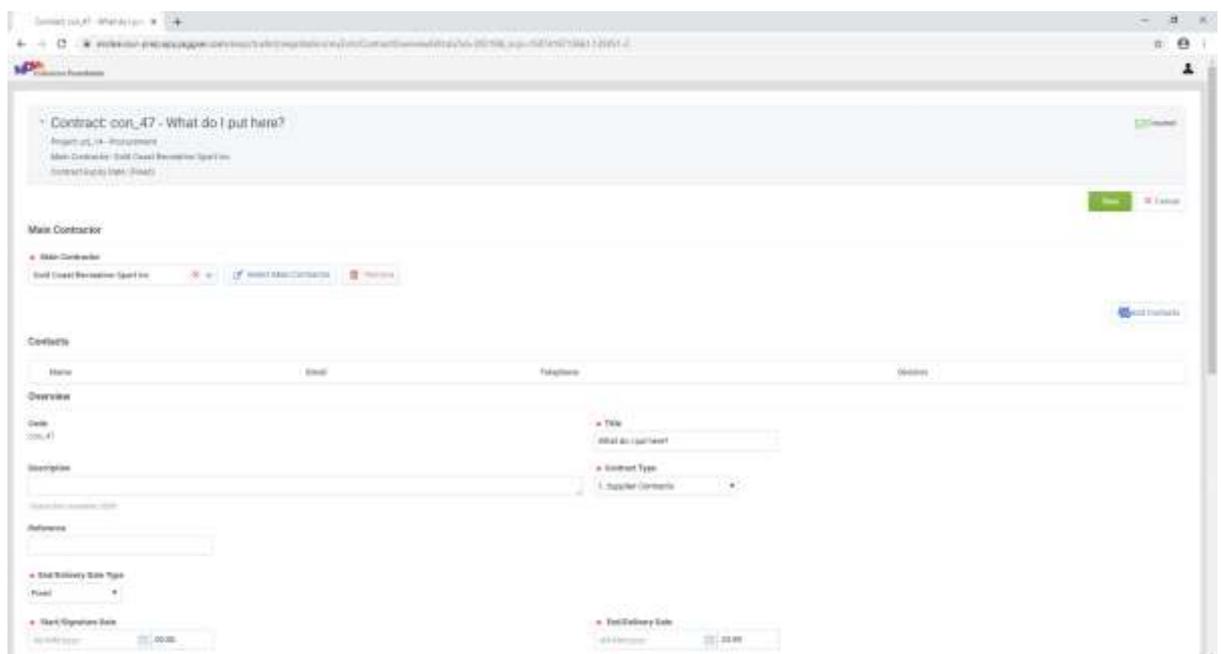
Select option 2 if you are in Sales & Marketing and you are entering in a customer to the Work sites eg: Coca Cola.

All other contracts, select option 1. Supplier Contracts.

10. Click Create.

Page 2

You then appear in this screen.



This screen sets the parameters for contract entry and has brought across the information you have already entered in

11. Main Contractor

- a) Main Contractor (mandatory) the information has defaulted over from the previous screen entries, if you have made a mistake you can change it here

12. Contacts

- a) The information will flow through from the supplier details we have on file. If you click on "Add Contacts" you can enter in more supplier contact names, however you can only select if they are noted in the supplier file. Procurement can help you with updating supplier details. Note: we are not opening up this system to suppliers to view and interact until FY22

Create a Contract

Contract: con_47 - What do I put here?

Project ID: 14 - Recruitment
Main Contract: 001 - Direct Recruitment Spend Inv
Contracting by Item: 0000

Select Items to Add as Contract Items

Quick Selection Name: Type in contract ID to find items

Select with Search Criteria

b) Click on “Select with search criteria”

Contract: con_47 - What do I put here?

Project ID: 14 - Recruitment
Main Contract: 001 - Direct Recruitment Spend Inv
Contracting by Item: 0000

Select with search criteria

Material	Material	New Department	Risk	Unit	Phone Number
1	1001	0000	0000	0000	01 5621 5612

Total 1

Page 1 of 1

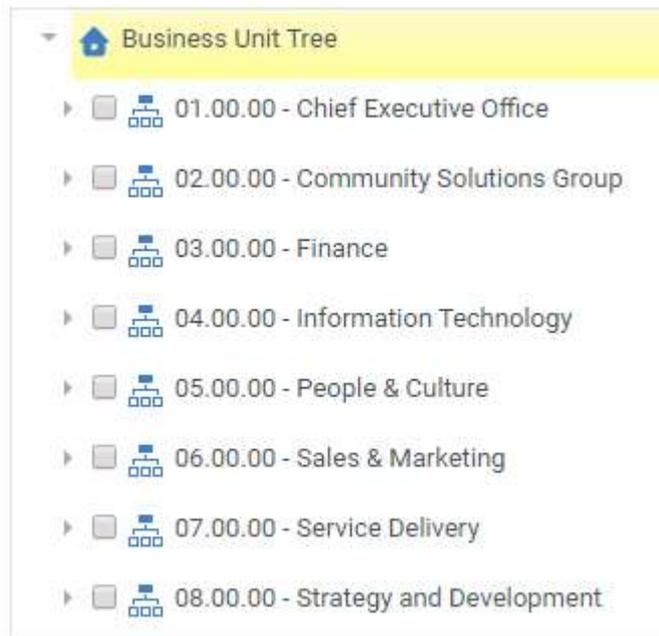
13. Overview

- Code -> con_## is the new contract number
- Title (mandatory) has populated from previous screen, you can update or alter here if required
- Description, this is free text and you should type in here a short description of what the contract is providing/delivery on eg: supply of support workers to Service Delivery Home and Community sites in Queensland
- Contract Type (Mandatory) has populated from previous screen, you can update here if you have made an error
- Reference – has populated from the previous screen, this should be the internal contact for the new agreement

Create a Contract

- f) End/Delivery Date Type (mandatory)– select the appropriate drop down, we default to Fixed as we encourage all our contracts to have an end date.
 - a. Fixed - use when there is an end date provided (either by months, annual or actual date,
 - b. Automatic Renewal - for perpetual contracts only (however we prefer this not to be used and place in a date 12 – 24 months from start date so contract/services can be reviewed),
 - c. No End/Delivery Date - do not use, as all contracts should have an end date
- g) Start/Signature Date (mandatory)– enter in the commencement Date noted in the agreement
- h) End/Delivery Date (mandatory) – enter in the end date noted in the agreement (if no end date, place in a date 12 – 24 months from start date so contract/services can be reviewed)
- i) Send Reminder Alert (mandatory) – this defaults to Yes as the Contract Manager & Buyer will be notified so many months prior to the contract ending so they can contact Procurement if necessary, to arrange for renewal, cancellation etc.
 - a. To (mandatory) select from drop down
 - i. “Contract Manager”, the alert will come to you only
 - ii. Buyers (as per User Rights), the alert will go direct to the Buyer (Endeavour internal contact)
 - iii. Buyers, Main Contractor and Contract Manager”. The alert will go to all three parties including the supplier.
 - b. Days before Contract Expiry Date (mandatory) defaults to 90, you can alter depending on what the agreement states for the notice) must be numerical. We are defaulting to 90 days (3 months) but take into account how much notice you may need to review and renew or cancel. Refer to Procurement if you require assistance
- j) Total Contract Value (mandatory) – type in the total amount we will spend with the supplier for the whole term of the agreement (include any options, extensions)
- k) Currency – defaults to AUD. Only change if the contract states other currency.
- l) Hide Value from Main Contractor: defaults to Yes. You only select No if you want the Supplier to view this information (when we open up to suppliers to view)
- m) Visible in global Contracts (mandatory) – defaults to Yes. This means this contract will be visible to all eligible users within the system (aligning with access to projects etc)
- n) Manage Subcontractors (mandatory) this defaults to No. Only change this to yes, if the supplier is subcontracting out some work, wo we can enter in details to monitor on a later page
- o) Manage Prices (mandatory) – this defaults to No. Only select yes, if you have a rate card and want to enter in the pricing at a later stage.
- p) Manage Master Document (mandatory) – this defaults to No. Only change this to yes, if we are building the agreement within the system and want approvals of documents in the system. Mainly used by the procurement team driving contracts
- q) Manage Discussions – This defaults to Yes this allows you to send notes, discussions within the system for the contract to internal staff (if they have access) and suppliers (if turned on)
- r) Created by – this shows who is creating the contract
- s) Business Unit (Mandatory) click on select Business Units.

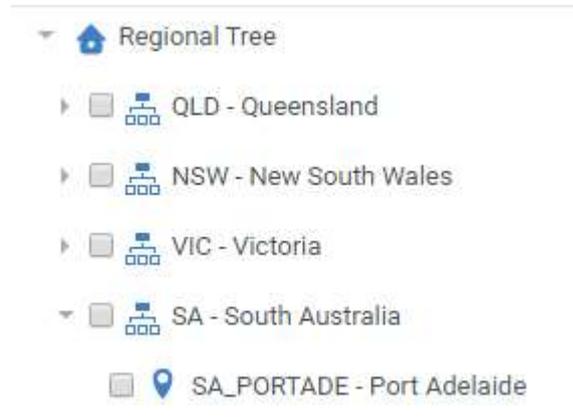
Create a Contract



Click the check box for the Business Unit this agreement belongs in. Do not select multiple.

Click confirm to enter.

t) Regions - Click on Select Regions (not mandatory)



Click on the arrow to drill down to site or select the site the supply/product is relating to. This will be mainly used if a contract is for a specific site or region only, not group wide contracts

Click confirm to enter in.

This field is to show the 'sponsor' of the agreement at a Executive level.

u) Categories (Mandatory) - Click on Select Categories

Create a Contract

- Corporate
- ▶  01.01.00 - Canteen and Catering
- ▶  01.02.00 - Fee, licenses and subscriptions
- ▶  01.03.00 - Financial services
- ▶  01.04.00 - First Aid, CPR, Clinical and Ambulance Services
- ▶  01.05.00 - Insurance
- ▶  01.06.00 - Meeting, conference and entertainment expenses
- ▶  01.07.00 - Office equipment and services
- ▶  01.08.00 - Office equipment, stationery and services
- ▶  01.09.00 - Postage & Courier
- ▼  01.10.00 - Professional Services
 - Professional Services
 - ▶   01.10.01 - Art supplies
 - ▶   01.10.02 - Audit Fees
 - ▶   01.10.03 - Compliance (Corporate)
 - ▶   01.10.04 - Compliance (Health & Safety)
 - ▶   01.10.05 - Evacuation plans
 - ▶   01.10.06 - Legal Services
 - ▶   01.10.07 - Professional & Consulting services

Categories are aligned to the general ledger codes. Drill down until you find the category the contract belongs to try to be as accurate as you can.

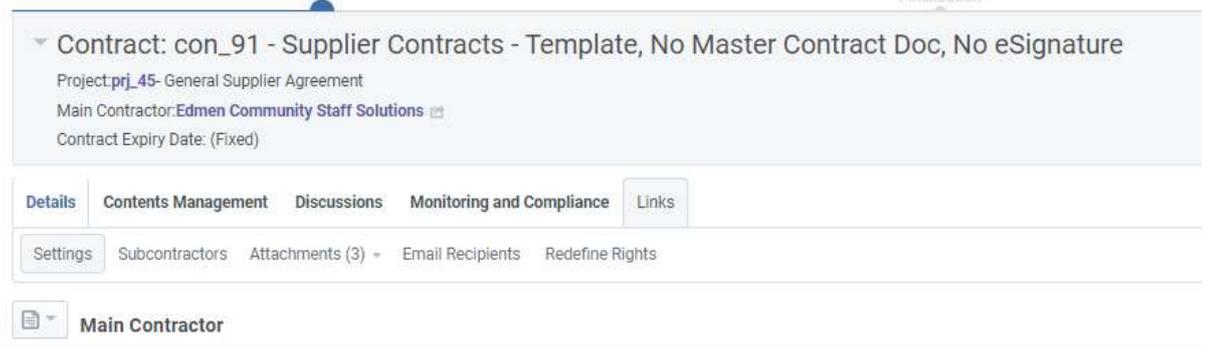
Click confirm to enter in.

Click on Save

Page 3

This then opens up several tabs

Create a Contract



Details

Settings

This is the tab you have just finished completing (page 2)

Subcontractors

If you selected yes to managing them, this tab will appear. It won't show if you selected No.

To add a sub contractor click on

[+ Add Subcontractor](#)

Click on

[+ Supplier Directory Search](#)

to reveal a list of suppliers to search on

You can either start typing the supplier name in the box "enter organization name" or scroll to find your supplier.

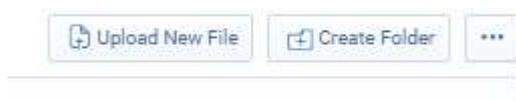
If the supplier name is not there, contact Procurement to add the supplier into the system.

Tick the box next to the supplier name and click on add supplier

Click on Save

Attachments

Select from Drop Down (Visible Only to Buyers, Visible to Main Contractor)



We have set up some default commonly used folders, click on these if the document you wish to add fits into the selection otherwise

Select "Upload New File" then select "Select Files to Upload" this allows you to search in our directory for the saved file.

You can also drag a file from the directory into the box "Use the button to Upload or DRAG and DROP into this area"

Select Confirm

Select Save All

Create a Contract

Select “Create Folder” to start up a new folder to your choosing to store supporting documents. As a guide I would suggest Onboarding docs (ABN check, new supplier form, bank account confirmation), Insurance Folder, RFP doc, Approvals.

Email Recipients

For discussions within the system, you can add users to send messages to or arrange approvals of pricing or documents.

Redefine Rights

Leave this section as is

Contents management

Additional Information

1. Contract Details
 - a. Legal Entities – Select from the drop down the correct Endeavour Legal Entity signing the contract
 - b. Contract Owner ELT– Select the appropriate ELT member (sponsor of the agreement)
 - c. Contract Owner – ensure this is blank, as this question will be deleted in future
 - d. Signed Business Case, select response, if you don't have a business case select No
 - e. Type of Contract – Please select a contract type from the list? (mandatory) Drop Down. Pick the most appropriate.
 - f. Vendor Selection – Click and select how the supplier was sourced
 - g. Payment Terms – enter in the days (numerical) 7, 14 30 etc as per the agreement
 - h. Contract Risk Segmentation – select the risk of the agreement/service
2. Migration Details
 - a. SharePoint ID – Migrated Contract ID, this is automated over for legacy agreements. Leave blank otherwise
3. Workstream and Financials
 - a. Impacted Business Units –select the Business Unit associated with the Contract, this can be multiple
 - b. Category Lead – Select Category lead (mandatory) from Drop down
 - c. Contract Notes – Please enter any relevant contract notes

Prices

If you selected yes to managing pricing, this tab will appear. It won't show if you selected No.

Create a Contract

Discussions

Discussions List

Click on Create Discussion

Enter a title of the discussion

Enter in the message you want to send

It will default to the contract manager; you can add in other recipients by clicking on the +Add button

To send, click on create discussion and Post first message button



Monitoring and Compliance

Milestones

This section is used to manage any deliverables in the agreement, like price increase, annual reviews, insurance certificates etc

Click on Edit List

Click on Create if you only have one or multiple if you have a few the same

We have some defaults to pick from that are general across all agreements

Select the type of milestone, the title and description and due date. Select who you want to receive the alerts under Alert Recipients

History of Changes

This section is an audit of all entries in the contract

Alerts

This section provides a list of default alerts that are sent, and a history of ones sent.

Messages

Create Message

Received Messages

Sent Messages

Draft Messages

Forwarded Messages

Links

Contract Relationships

This section allows you to link this contract with other ones. Generally used for master and child type relationships to keep all entries together, especially with multiple variations.

Assuming all contracts are created, click on Link

Select the relationship the contract is to the linked contract

Click on Link button

Create a Contract

You will then be able to search for the existing contract to link. Search by contract name, contract number etc.

Tick the box next to the entry and click select