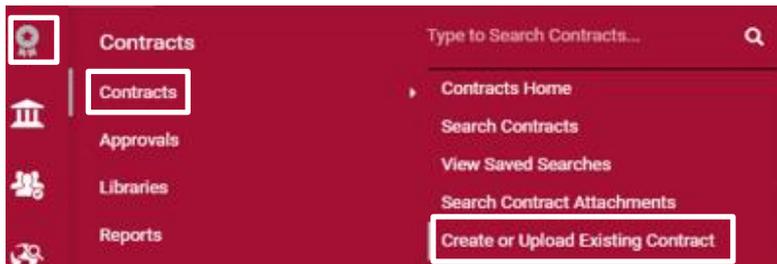


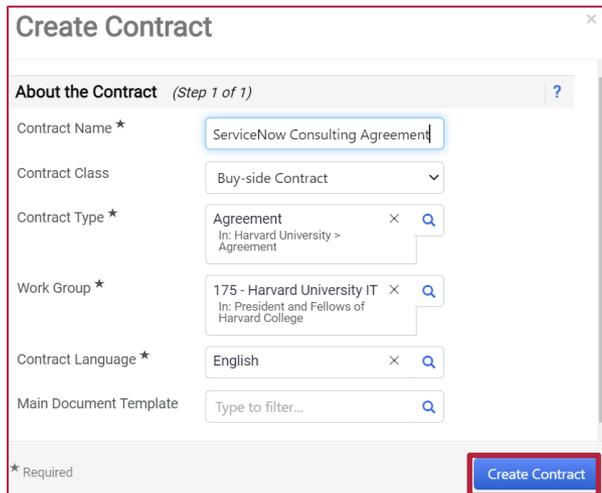
# Create or Upload an Existing Contract

For storage and management of a contract, a Contract Manager can create a contract record within the Buy-to-Pay (B2P) contract management tool that contains key information, data and document(s). This guide provides a high-level overview on how to create a contract record with references to documents that provide the detailed instructions. *All referenced documents can be found on the [Contract Management Training Site](#).*

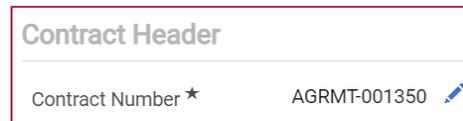
1. To create a new contract record, click on to **Contracts>Create or Upload Existing Contract**.



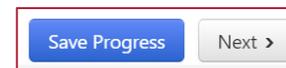
2. Provide the initial information. To automatically generate the initial draft of the contract document, select the applicable Main Document Template; if you already have a draft document or will create the draft outside of B2P, leave this field blank. Click **Create Contract** to create the contract record. *Refer to the [Contract Header Field Guide Resource](#).*

A screenshot of the 'Create Contract' form. The form is titled 'Create Contract' and has a close button (X) in the top right corner. Below the title is a section 'About the Contract (Step 1 of 1)' with a help icon (?). The form contains several fields: 'Contract Name \*' with the value 'ServiceNow Consulting Agreement'; 'Contract Class' with a dropdown menu showing 'Buy-side Contract'; 'Contract Type \*' with a dropdown menu showing 'Agreement' and a search icon; 'Work Group \*' with a dropdown menu showing '175 - Harvard University IT' and a search icon; 'Contract Language \*' with a dropdown menu showing 'English' and a search icon; and 'Main Document Template' with a search bar. At the bottom left, there is a note '\* Required'. At the bottom right, there is a blue button labeled 'Create Contract'.

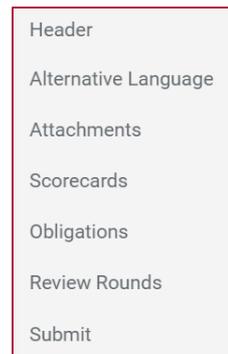
3. Once the record is created with an auto assigned unique Contract Number, complete the remainder of the Contract **Header**. *Refer to the [Contract Header Field Guide Resource](#).*

A screenshot of the 'Contract Header' form. The form is titled 'Contract Header' and has a close button (X) in the top right corner. Below the title is a field 'Contract Number \*' with the value 'AGRMT-001350' and a search icon.

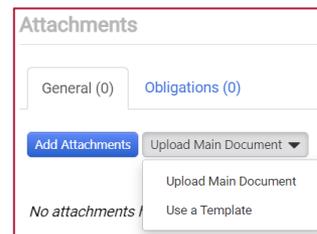
4. To save information throughout the completion of the contract record, click **Save Progress** or **Next**.

A screenshot of two buttons: a blue button labeled 'Save Progress' and a grey button labeled 'Next >'. Both buttons are highlighted with a white box.

5. On the left side, is a series of links to all sections of the contract record. Not all sections are currently being used (e.g., Alternative Language, Scorecards). Some sections are only used for some contracts (e.g., Obligations, Review Rounds).

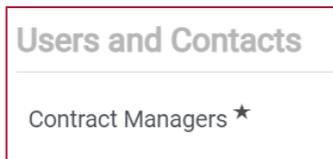


6. If not already automatically generated in Step 2, under the **Attachments** section, upload the contract document (Main Document) or create it via a Main Document Template. Other supporting documents can be uploaded as Attachments. *Refer to the [Contract Main Document and Attachments Quick Reference Guide](#).*

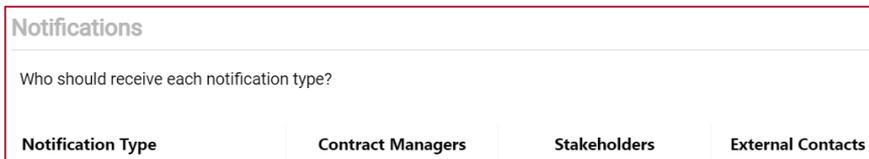
A screenshot of the 'Attachments' section. The section is titled 'Attachments' and has a close button (X) in the top right corner. Below the title are two tabs: 'General (0)' and 'Obligations (0)'. Below the tabs are two buttons: a blue button labeled 'Add Attachments' and a grey button labeled 'Upload Main Document'. Below the buttons is a dropdown menu with two options: 'Upload Main Document' and 'Use a Template'. The section is highlighted with a white box.

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7. After uploading or creating documents, under the **Users and Contacts** section; establish who can view the entire contract record, edit the contract record, view a summary of the contract with or without documents. Refer to the [Contract Record Visibility Quick Reference Guide](#), [Contract Manager Designation Notice Resource](#), [Stakeholder Designation Notice Resource](#), and [Facilitator Designation Notice Resource](#).

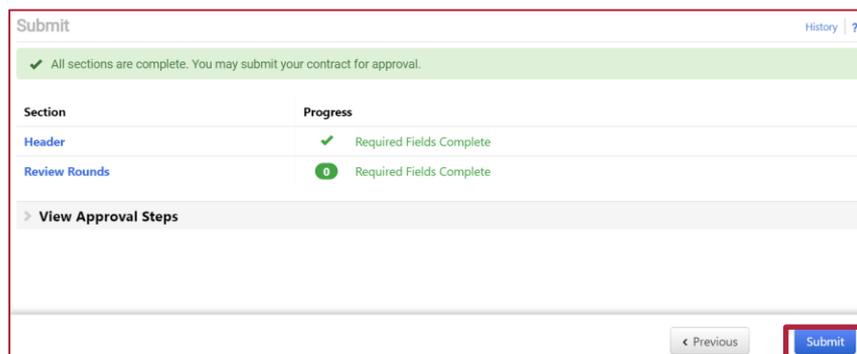


8. After establishing contract record visibility, under the **Notifications** section, set up the notifications (e.g., End Date – Advance Notices) needed to effectively manage the contract going forward. Refer to the [Contract Notifications Quick Reference Guide](#).



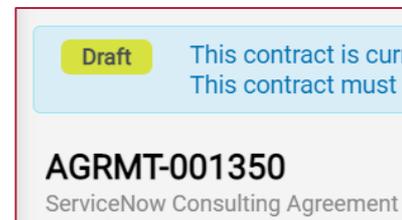
The image shows a screenshot of a 'Notifications' section. At the top, the word 'Notifications' is in a bold, dark font. Below it is a question: 'Who should receive each notification type?'. Underneath is a table with four columns: 'Notification Type', 'Contract Managers', 'Stakeholders', and 'External Contacts'. The 'Notification Type' column is currently empty, while the other three columns have some faint, illegible text.

9. After entering all required and available information, under the **Submit** section, click **Submit**; and then on the Approval Details popup, click **Submit** again.



The image shows a screenshot of a 'Submit' section. At the top, the word 'Submit' is in a bold, dark font. Below it is a green banner with a checkmark and the text: 'All sections are complete. You may submit your contract for approval.' Underneath is a table with two columns: 'Section' and 'Progress'. The 'Section' column has two entries: 'Header' and 'Review Rounds'. The 'Progress' column has two entries: a green checkmark followed by 'Required Fields Complete' and a green circle with a white '0' followed by 'Required Fields Complete'. Below the table is a button labeled 'View Approval Steps'. At the bottom right, there are two buttons: 'Previous' and 'Submit'.

10. The status of the contract will display in the upper left corner of the contract record. Refer to the [Contract Status Definitions Resource](#).



11. Other contract record sections that may be utilized for some contracts:

**Digital Accessibility** to capture additional information when the contract in some way involves technology. Refer to the [Contract Header Field Guide Resource](#).

**Obligations** to prompt notifications not supported by the Notifications feature. Refer to the [Contract Obligations Quick Reference Guide](#).

**Review Rounds** to send the contract document for internal or external review.

**eSignature** to route the Main Document for electronic signature. Refer to the [eSignature Quick Reference Guide](#).

**eProcurement Set Up** and **Applies To** to enable linking a requisition/PO/Invoice to a contract. Refer to the [How to Link a Contract to a Requisition Quick Reference Guide](#).

**Budget and Spend** to establish a budget and track spend against it. Refer to the [Contract Budget and Spend Quick Reference Guide](#).

**Comments** and **Communication Center** both allow sending and tracking of comments/communications.

**Contract Family** will, based on the use of the Parent Contract field on the Header, list any contracts that tie to each other through language in one or more of the contracts.

Not a contract record section, but other helpful features include:

**Contract Authoring**, a Word app that allows updating of a Word document within the contract record and syncing of select placeholders within the document to fields on the contract record. Refer to the [Contract Authoring App Quick Reference Guide](#).

**Search Contracts** to locate an existing contract record for viewing or update. Refer to the [Contract Search Quick Reference Guide](#).

**Help** is available on every page, click **?** in the upper right corner; and on some fields, click **i** to the right of the field.