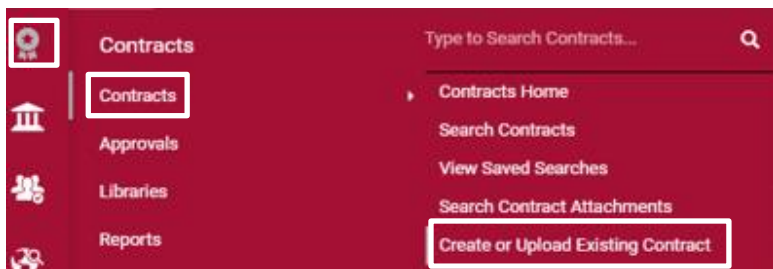


Create or Upload an Existing Contract

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 'About the Contract' section (Step 1 of 1) contains the following fields: 'Contract Name' (ServiceNow Consulting Agreement), 'Contract Class' (Buy-side Contract), 'Contract Type' (Agreement), 'Work Group' (175 - Harvard University IT), 'Contract Language' (English), and 'Main Document Template' (Type to filter...). A red box highlights the 'Create Contract' button at the bottom right.

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 'Contract Number' field is highlighted with a red box and contains the value 'AGRMT-001350'.

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

A screenshot showing two buttons: 'Save Progress' and 'Next >'. Both buttons are highlighted with a red 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).

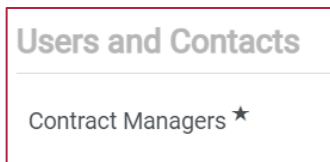
A screenshot of the contract record navigation sidebar. It contains a list of links: 'Header', 'Alternative Language', 'Attachments', 'Scorecards', 'Obligations', 'Review Rounds', and 'Submit'. The 'Header' link is highlighted with a red box.

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. It shows tabs for 'General (0)' and 'Obligations (0)'. Below the tabs are buttons for 'Add Attachments', 'Upload Main Document', and 'Use a Template'. The 'Add Attachments' button is highlighted with a red 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](#).*

Notifications

Who should receive each notification type?

Notification Type	Contract Managers	Stakeholders	External Contacts
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9. After entering all required and available information, under the **Submit** section, click **Submit**; and then on the Approval Details popup, click **Submit** again.

Submit History ?

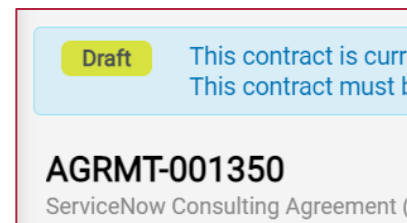
✓ All sections are complete. You may submit your contract for approval.

Section	Progress
Header	✓ Required Fields Complete
Review Rounds	0 Required Fields Complete

> View Approval Steps

< Previous 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 ⓘ to the right of the field.