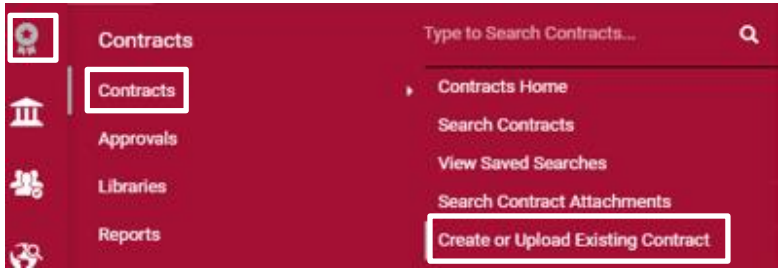
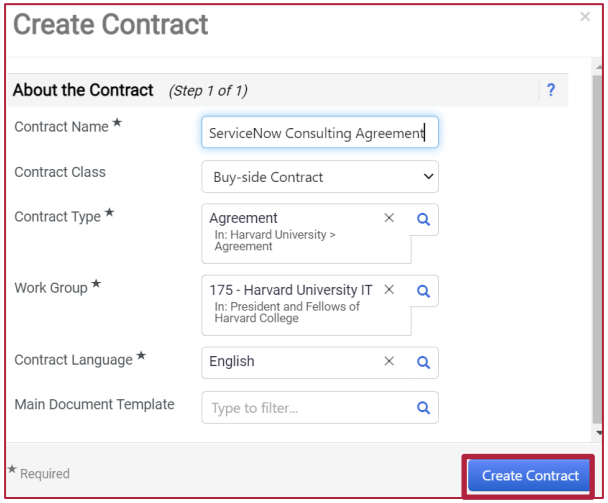
# Create or Upload an Existing Contract

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.*

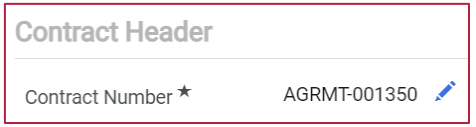
1. To create a new contract record, click on to **Contracts>Create or Upload Existing Contract.**



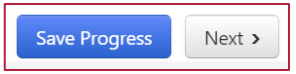

2. Provide the initial information. To automatically generate the initial draft of the contract document, select the applicable Main Document Template; if you already have a draft document or will create the draft outside of B2P, leave this field blank. Click **Create Contract** to create the contract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



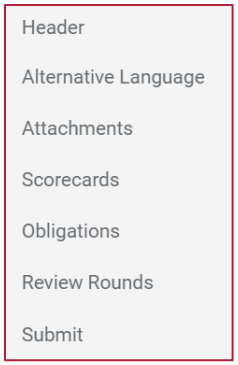

3. Once the record is created with an auto assigned unique Contract Number, complete the remainder of the Contract **Header**. *Refer to the Contract Header Field Guide Resource.*



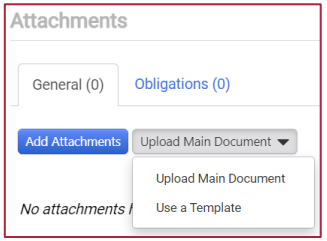

4. To save information throughout the completion of the contract record, click **Save Progress** or **Next**.




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.*



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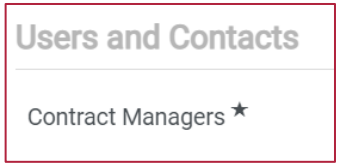
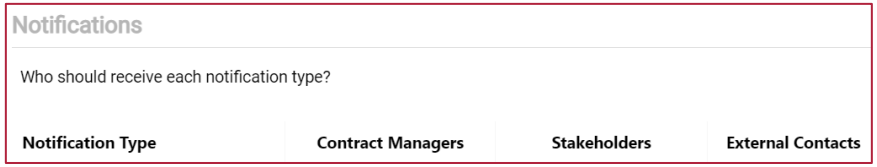
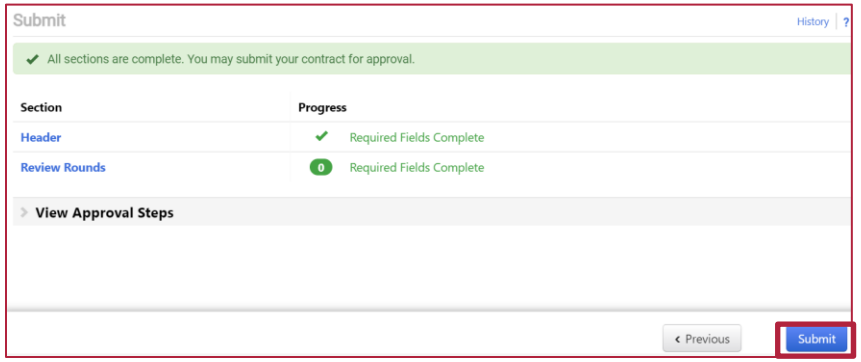
7. After uploading or creating documents, under the **Users and Contacts** section; establish who can view the entire contract record, edit the contract record, view a summary of the contract with or without documents. *Refer to the Contract Record Visibility Quick Reference Guide, Contract Manager Designation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



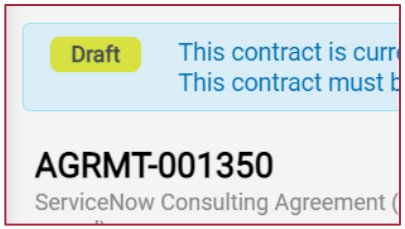

8. After establishing contract record visibility, under the **Notifications** section, set up the notifications (e.g., End Date – Advance Notices) needed to effectively manage the contract going forward. *Refer to the Contract Notifications Quick Reference Guide.*




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




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 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.

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