

Contract Management: Practice Project #1

In this activity, you will build an automated contract approval workflow for your company. You can use this workflow to upload a contract and automate the review and approval process using Sys.tm. Contracts with less than \$10,000 will be routed to a Manager, while contracts over \$10,000 will automatically route to a CFO for review.

Adding User Tasks:

1. Before starting this project, [click here](#) to access and download the sample documents you will be using for the Contract Management Projects.
 - a. When downloaded, navigate to the **CM-Sample-Data.zip** file on your PC.
 - b. Right-click on the **ZIP file** and select **Extract All**.
 - c. When prompted to choose a location to save the extracted files, navigate to your **desktop** and click **Extract**. Or you can click **Extract All** in the file explorer **toolbar**.
2. Log into Sys.tm at www.sys.tm/signin or create an account with a free 30 day trial at www.sys.tm/signup
NOTE: Other people involved in this contract approval process (such as a manager or CFO) will need to have their own Sys.tm accounts. You will need to invite those people to your company's Sys.tm Organization.
3. On the **Dashboard**, click the **hamburger icon** to the right of the Dashboard dropdown and select **Create New Widget**.
4. For **Name**, type **User Tasks**.
5. Click the **Type** dropdown and select **User Tasks**.
6. Click the **Assignment Filter** dropdown and select **All**.
7. Under **Displayed Columns**, select checkboxes for the following:
 - a. Assigned User
 - b. Flow Name
 - c. Activity Name
 - d. Menu
 - e. Priority
8. Click **Create**.
 - a. For **Dashboard Name**, type **User Tasks**.
 - b. Click **Save**.

Administration and Setup:

1. On the Sys.tm **Dashboard** under **Features**, click **Metadata**.
2. Create a **Metadata Property**.
 - a. On the right, click **Create**.
 - b. For **Name**, type **Contract Title**.

- c. For **Type**, leave the default as **Text**.
 - d. Click **Create**.
3. Repeat the previous step to create the following properties:
 - a. Contract Status
 - i. When creating this property, leave the default **Type** of **Text**.
 - ii. Create a pre-defined list.
 1. Click the **Values** tab.
 2. Click the **Selection** dropdown and choose **Select Values from List**.
 3. To the right of **Values**, click the **Add Value** plus sign.
 - a. For **Value 1**, type **Draft**.
 4. Add three more values: **Active**, **Expired**, and **Terminated**.
 - iii. Click **Create**.
 - b. Effective Date
 - i. When creating this property, click the dropdown for **Type** and select **Date/Time**.
 - ii. For **Display Format**, click **Short** in the dropdown menu.
 - c. Expiration Date
 - i. When creating this property, click the dropdown for **Type** and select **Date/Time**.
 - ii. For **Display Format**, click **Short** in the dropdown menu.
 - d. Party A Name
 - i. When creating this property, leave the default **Type** of **Text**.
 - e. Party B Name
 - i. When creating this property, leave the default **Type** of **Text**.
 - f. Contract Value
 - i. When creating this property, click the dropdown for **Type** and select **Number**.
 - ii. Click to enable the toggle button for **Currency**.
 - iii. Ensure the **Currency Code** matches the currency used in contracts you receive.
 - g. Signed Date
 - i. When creating this property, click the dropdown for **Type** and select **Date/Time**.
 - ii. For **Display Format**, click **Short** in the dropdown menu.
4. Create a Collection

- a. Click the **Collections** tab.
 - b. On the right, click **Create**.
 - c. For **Name**, type **Contracts**.
 - d. Add metadata properties to the collection.
 - i. Next to **Property Name**, click the **plus** icon.
 - ii. Select the checkboxes next to the properties created in the previous steps:
 1. Contract Status
 2. Effective Date
 3. Expiration Date
 4. Party A Name
 5. Party B Name
 6. Contract Value
 7. Signed Date
 - iii. Click **Add** to close the Add Properties window.
 - e. Click **Create** to close the Create New Collection window.
5. Create a **Group**.
 - a. Return to the Dashboard by clicking the **Sys.tm logo** in the top left corner.
 - b. Under **Features**, click **Users and Groups**.
 - c. Click the **Groups** tab.
 - d. On the right, click **Create**.
 - i. For **Group Name**, type **Contract Review**.
 - ii. Click **Create**.
 - iii. Select the checkboxes next to the following:
 1. Your user
 2. Manager
 3. CFO
 - iv. Click **Add** to close the Add Users to Group window.
 - e. Click **Close** to close the Current Membership window.
6. Configure Permissions for the Accounts Payable Group.
 - a. Click the three dots for the **Contract Review** group and select **Permissions**.
 - b. Click the arrow to the right of **File System** to expand the available options.
 - c. Click the toggle button next to **Access**.
 - d. Click **Save** to close the Permissions – Contract Review window.
7. Return to the Dashboard.
8. Create folders for Contracts.
 - a. Under **Features**, click **Files**.
 - b. On the right, click **New Folder**.

- i. For **Folder Name**, type **Contracts**.
 - ii. Click **Create**.
 - c. Click the **Contracts** folder to view its contents.
 - d. Within the **Contracts** folder, create two new folders:
 - i. Draft Contracts
 - ii. Awaiting Signature
9. Assign groups and permissions to the folders.
 - a. Click **Files** in the breadcrumbs.
 - b. Click the three dots for the **Contracts** folder and select **Properties**.
 - c. Click the **Security** tab.
 - d. Click **Group**.
 - i. Select the checkbox next to the **Contract Review** group.
 - ii. Click **OK** to close the Select a Group window.
 - e. Select the checkbox next to **Folder/File Permissions** to assign all permissions.
 - f. Near the top under **Permission Inheritance**, select the checkbox next to **Update all subfolders and files**.
 - g. Click **Save** to close the Properties window.

Create a Flow for Contract Review & Approvals

1. Return to the Dashboard.
2. Under **Features**, click **Flows**.
3. Create a new Flow.
 - a. On the right, click **Create** and select **Designer**.
 - b. For **Name**, type **Contract Review**.
 - c. Click **Create**.
4. Add an activity to automatically obtain contract metadata from an uploaded document, then route the contract for review to the appropriate party.
 - a. In the **Activities** column on the left, click and drag **AI Query** to the **Flow Designer** window and place it between the **Start** and **Stop** icons.
 - b. Click the three dots for **AI Query** and select **Properties**.
 - c. Click the **General** tab.
 - i. For **Name**, replace the existing text with **Obtain Contract Value**.
 - d. Select a Metadata Collection to store metadata values.
 - i. Click the **Metadata Output** tab.
 - ii. Click the dropdown for **Metadata Collection** and select **Contracts**.
 - iii. Select the checkbox next to **Save to Property Bag**.
 - e. Click **OK** to save the changes to the AI Query step.
 - f. Click the three dots for **Obtain Contract Value** and select **Properties**.
 - g. Add Transitions based on the Contract Value.
 - i. Click **Transitions** tab.
 - ii. Click the **Create New Transition** plus sign.
 1. For **Branch Name**, replace the default text with **Equal or Over \$10,000**.
 - a. Click the plus sign next to **Target Activity**.

- i. Click **User Tasks**.
 - ii. For **Name**, replace **User Tasks** with **CFO Review**.
 - b. Click **OK** to close the Add Activity window.
 - c. Click the plus sign next to **Condition**.
 - i. Click the **Builder** icon next to **First Operand**.
 1. Select **[@Metadata/Contract Value]**.
 2. Click **OK**.
 - ii. Click the **Operator** dropdown and select **Is greater than or equal to**.
 - iii. For **Second Operand**, type **10000**.
 - iv. Click **Create**.
 - d. Click **Create**.
 - iii. Click the three dots for the **Default** transition and select **Properties**.
 1. For **Branch Name**, replace the existing text with **Less than \$10,000**.
 - a. Click the plus sign next to **Target Activity**.
 - i. Click **User Tasks**.
 - ii. For **Name**, replace the default text with **Manager Review**.
 - iii. Click **OK** to close the Add Activity window.
 - b. Click the checkbox next to **Continue Evaluating After Transition** to remove the selection.
 - c. Click the plus sign for **Create New Condition**.
 - i. Click the **Builder** icon next to **First Operand**.
 1. Select **[@Metadata/Contract Value]**.
 2. Click **OK**.
 - ii. Click the **Operator** dropdown and select **Is less than**.
 - iii. For **Second Operand**, type **10000**.
 - iv. Click **Save**.
 - d. Click **Save**.
 - iv. Click **OK** to close the Properties window.
 5. Configure the Manager Review User Task to send review notifications.
 - a. Click the three dots for **Manager Review** and select **Properties**.
 - b. Click the **Administrators** tab.
 - i. Click **User**.
 - ii. Select the **checkbox** next to your user account.
 - iii. Click **OK**.
 - c. Click the **Instructions** tab.
 - i. In the textbox, type or paste the following:
Please review and approve or reject the contract. If rejecting, please provide a reason for rejection.
 - d. Click the **Notifications** tab.
 - i. For **Subject**, type or paste the following: **Contract for Review – Value @[@Metadata/Contract Value]**.

- ii. Click the **Builder icon** in the **Attachment File(s)** textbox.
 - 1. Click **#[FileIds]**.
 - 2. Click **OK**.
- iii. In the text editor section, type or paste the following:
Please find the attached contract for your review. The document is complete and ready for your consideration. If you have any questions or require any revisions, please let me know. I look forward to your feedback.
- iv. Hit **Enter** on the keyboard to move to the next line.
- v. At the bottom of the text editor, click **Start Task** to add a start button to the email.
- e. Select participants to review the contract.
 - i. Click the **Participants** tab.
 - ii. Click **User**.
 - 1. Select the **checkbox** next to the username for your **Manager**.
 - 2. Click **OK**.
- f. Create two checkboxes indicating whether to approve or reject the contract:
 - i. Click the **Selections** tab.
 - 1. Change **Maximum Selections** from **1** to **2**.
 - ii. Create the first option.
 - 1. Click the plus sign next to **Description**.
 - 2. For **Name**, type **Approve**.
 - 3. For **Property Bag Name**, type **MgrApproved**.
 - 4. For **Description**, type **Select this checkbox to approve the contract**.
 - 5. Click **Create** to close the Create Selection window.
 - iii. Add a second option.
 - 1. Click the plus sign next to **Description**.
 - 2. For **Name**, type **Reject**.
 - 3. For **Property Bag Name**, type **MgrRejected**.
 - 4. For **Description**, type **Select this checkbox to reject the contract**.
- g. Add a Text Input field for the reviewer to explain the reason for rejection:
 - 1. Click the plus sign next to **Description**.
 - 2. For **Name**, type **Reason for Rejection**.
 - 3. For **Property Bag Name**, type **ContractRejectReason**.
 - 4. For **Description**, type or paste the following:
If rejecting the contract, please explain why and include revision details here."
 - 5. Click **Create** to close the Create Selection window.
- ii. Click **OK** to close the properties window.
- h. Add an email activity to notify you via email if the contract has been denied by the Manager.
 - i. Click the three dots for **Manager Review** and select **Properties**.
 - ii. Click the **Transitions** tab.
 - iii. Click the **plus sign** for **Create New Transition**.

- iv. For **Branch Name**, replace the default text with **Manager Rejection Email**.
- v. Click the plus sign next to **Target Activity**.
 - 1. Click **Send Email**.
 - 2. For **Name**, replace the default text with **Manager Rejection Email**.
 - 3. Click **OK**.
- vi. Click the plus sign next to **Condition**.
 - 1. Click the **Builder icon** for **First Operand**.
 - a. Click **@[UserTasks/Selection/MgrRejected]**.
 - b. Click **OK**.
 - 2. Click the **Operator** dropdown and select **Is Not Null**.
 - 3. Click **Create**.
- vii. Click **Create**.
 - i. Click **OK** to close the Manager Review – Properties window.
- 6. Save your progress by clicking the **Floppy Disk** icon in the top right corner of the Flow Designer window.
 - a. When prompted to **Publish**, click **No**.
- 7. Configure the CFO Review User Task.
 - a. Click the three dots for **CFO Review** and select **Properties**.
 - b. Click the **Administrators** tab.
 - i. Click **User**.
 - 1. Select the checkbox next to your user account to set yourself as the Administrator.
 - 2. Click **OK**.
 - c. Click the **Instructions** tab.
 - i. In the email body, type or paste the following:
Please review and approve or reject the contract. If rejecting, please provide a reason for rejection.
 - d. Click the **Notifications** tab.
 - i. For **Subject**, type or paste the following: **Contract for Review – Value @[Metadata/Contract Value]**.
 - ii. Click the **Builder icon** in the **Attachment File(s)** textbox.
 - 1. Click **#[FileIds]**.
 - 2. Click **OK**.
 - iii. In the text editor section, type or paste the following:
Please find the attached contract for your review. The document is complete and ready for your consideration. If you have any questions or require any revisions, please let me know. I look forward to your feedback.
 - iv. Hit **Enter** on the keyboard to move to the next line.
 - v. At the bottom of the text editor, click **Start Task** to add a start button to the email.
 - e. Select participants to review the contract.
 - i. Click the **Participants** tab.
 - ii. Click **User**.

1. Select the checkbox next to the **CFO** account.
 2. Click **OK**.
- f. Create two checkboxes indicating whether to approve or reject the contract.
 - i. Click the **Selections** tab.
 1. Change **Maximum Selections** from **1** to **2**.
 - ii. Create the first option.
 1. Click the plus sign next to **Description**.
 2. For **Name**, type **Approve**.
 3. For **Property Bag Name**, type **CFOApproved**.
 4. For **Description**, type **Select this checkbox to approve the contract**.
 5. Click **Create** to close the Create Selection window.
 - iii. Add a second option.
 1. Click the plus sign next to **Description**.
 2. For **Name**, type **Reject**.
 3. For **Property Bag Name**, type **CFORejected**.
 4. For **Description**, type **Select this checkbox to reject the contract**.
 5. Click **Create** to close the Create Selection window.
 - iv. Add a Text Input field for the reviewer to explain the reason for rejection:
 1. Click the plus sign icon next to **Description**.
 2. For **Name**, type **Reason for Rejection**.
 3. For **Property Bag Name**, type **ContractRejectReason**.
 4. For **Description**, type or paste the following:
If rejecting the contract, please explain why and include revision details here.
 5. Click the **Selection Type** dropdown and select **Text Input**.
 6. Click **Create**.
 - v. Click **OK** to close the CFO Review – Properties window.
- g. Add an email activity to notify you via email if the contract has been rejected by the CFO.
 - i. Click the three dots for **CFO Review** and select **Properties**.
 - ii. Click the **Transitions** tab.
 - iii. Click the plus sign next to **Continue**.
 - iv. For **Branch Name**, replace the default text with **CFO Rejection Email**.
 - v. Click the plus sign next to **Target Activity**.
 1. Click **Send Email**.
 2. For **Name**, replace the default text with **CFO Rejection Email**.
 3. Click **OK**.
 - vi. Click the plus sign next to **Condition**.
 1. Click the **Builder** icon for **First Operand**.
 - a. Click **@[UserTasks/Selection/CFORejected]**.
 - b. Click **OK**.
 2. Click the **Operator** dropdown and select **Is Not Null**.
 3. Click **Create**.

- vii. Click **Create** to close the Create Transition window.
- 8. Configure the CFO Rejection Email.
 - a. Click the three dots to the right of the **CFO Rejection Email** and select **Properties**.
 - b. Click the **Addressees** tab.
 - i. Enter your email in the **To** field.
 - c. Click the **Email Body** tab.
 - i. For **Subject**, type **Contract Rejected**.
 - d. In the text editor, type or paste the following:
The submitted contract has been rejected by the CFO. See below for the reason for rejection.
 - e. Press **Enter** on the keyboard twice, then type **Rejection reason:**
 - f. Press the **Spacebar** on the keyboard once.
 - g. Click **Variables**.
 - i. Click **@[UserTasks/Selection/ContractRejectReason]**.
 - h. Click **OK** to close the CFO Rejection Email – Properties window.
- 9. Repeat the previous step for the Manager Rejection Email.
 - a. Use the following as the email body for the Manager Rejection Email body:
The submitted contract has been rejected by the Manager. See below for the reason for rejection.
Rejection reason: @[UserTasks/Selection/ContractRejectReason].
- 10. Add the CFO approval Email.
 - a. Click the three dots next to the **CFO Review** user task and select **Properties**.
 - b. Click the **Transitions** tab.
 - i. Click the three dots for the **Default** transition and select **Properties**.
 - 1. For **Branch Name**, replace the default text with **CFO Approval Email**.
 - 2. Click the plus sign next to **Target Activity**.
 - a. Click **Send Email**.
 - b. For **Name**, replace the default text with **CFO Approval Email**.
 - c. Click **OK**.
 - 3. Click the checkbox next to **Continue Evaluating After Transition** to remove this option.
 - 4. Click the plus sign next to **Condition**.
 - a. Click the **Builder** icon for **First Operand**.
 - i. Click **@[UserTasks/Selection/CFOApproved]**.
 - ii. Click **OK** to close the Configure Dynamic Value window.
 - b. Click the **Operator** dropdown and select **Is not null**.
 - c. Click **Create** to close the Create Condition window.
 - 5. Click **Save**.
 - ii. Click **OK** to close the CFO Review – Properties window.
 - c. Click the three dots next to the **Manager Review** user task and select **Properties**.
 - d. Click the **Transitions** tab.
 - i. Click the three dots for the **Default** transition and select **Properties**.

1. For **Branch Name**, replace the default text with **Manager Approval Email**.
2. Click the plus sign next to **Target Activity**.
 - a. Click **Send Email**.
 - b. For **Name**, replace the default text with **Manager Approval Email**.
 - c. Click **OK** to close the Add Activity window.
3. Click the checkbox next to **Continue Evaluating After Transition** to remove the option.
4. Click the plus sign next to **Condition**.
 - a. Click the **Builder** icon for **First Operand**.
 - i. Click **@[UserTasks/Selection/MGRApproved]**.
 - ii. Click **OK** to close the Configure Dynamic Value window.
 - b. Click the **Operator** dropdown and select **Is not null**.
 - c. Click **Create**.
5. Click **Save**.
 - ii. Click **OK** to close the Manager Review – Properties window.
11. Configure CFO Approval Email.
 - a. Click the three dots for **CFO Approval Email** and select **Properties**.
 - i. Click the **Addressees** tab.
 1. Type your email address in the **To** field.
 - ii. Click the **Email Body** tab.
 1. For **Subject**, type **Contract Approved**.
 2. In the text editor, type or paste the following:
Attention: The attached contract has been approved by the CFO.
You can now proceed with the execution of this contract.
 - iii. Click the **File Attachments** tab.
 1. Click the **Builder** icon for **Attachment File(s)**.
 - a. Click **#[FileIds]**.
 - b. Click **OK** to close the Configure Dynamic Value window.
 - iv. Click **OK** to close the CFO Approval Email – Properties window.
12. Repeat the previous step for the **Manager Approval Email**.
 - a. Use the following as the email body for this email:
Attention: The attached contract has been approved by the Manager. You can now proceed with the execution of this contract.
13. Save the flow.
 - a. When prompted to **Publish** the flow, click **Yes**.
 - b. When prompted to **Enable** the flow, click **Yes**.
14. Run files through the Contract Review Flow.
 - a. Return to the **Dashboard**.
 - b. Under **Features**, click **Files**.
 - c. Click the **Contracts** folder.

- d. Click the **Draft Contracts** folder.
- e. Upload the sample contracts to the **Draft Contracts** folder.
 - i. On the **Actions** panel on the right, click **Upload** and select **Files**.
 - 1. Locate the two sample contracts saved on your system.
 - 2. Select one file, then click **Open**.
 - ii. Click the three dots for the file and select **Start Flows**.
 - iii. Select the **checkbox** next to **Contract Review**.
 - iv. Click **Start**.

Optional: Test the second contract with your Contract Review Flow. You will notice that the \$4,000 contract is routed for Manager review, while the \$14,000 contract gets sent for the CFO's review.