

CONTRACTEXPRESS FOR SHAREPOINT

CONTRACT CREATION AND LIFECYCLE MANAGEMENT

ContractExpress for SharePoint is an enterprise class software platform optimized for Contract Lifecycle Management, business approval, storage and management reporting of revenue generating contracts and associated documents. It is highly configurable to perfectly map onto the business processes of an organization.

The solution delivers discrete value and benefits across the organization. For Sales management it offers revenue acceleration and decreased time to contract. For Financial and Compliance management there is guaranteed compliance with policy and revenue certainty and for Legal management, lower risk and reduced legal spend.

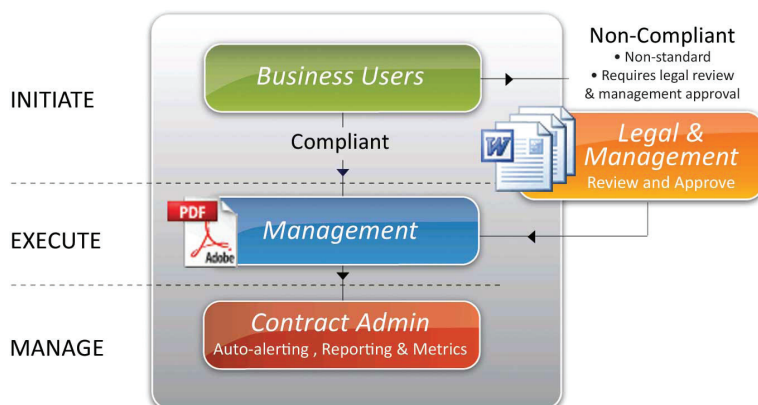
Comprehensive out of the box solution

ContractExpress for SharePoint delivers all the functionality needed to manage the contracts and legal documents through their lifecycle. It enables business users to automatically generate contracts of any complexity on a self-service basis. A sophisticated data driven document assembly engine verifies whether the terms of the contract meet business, legal and compliance standards. Depending on the outcome in-built, configurable workflows ensure that any contracts generated can map onto and follow the appropriate approval processes. Information about all users' activity and documents created by the system is stored in a searchable database, providing a reliable and comprehensive audit trail of all contract activity.

Standard delivery platform

ContractExpress for SharePoint is a solution for Windows SharePoint Services (WSS) and the Microsoft Office SharePoint Server (MOSS) systems. It is deployed on a Windows Server platform and utilizes Microsoft SQL Server at the data layer. The application layer consists of the ContractExpress data forms and document assembly web services which are built around a common Microsoft Windows Communication Foundation (WCF) interface. ContractExpress for SharePoint business processes leverage the Microsoft .Net Workflow Foundation system enabling extensibility of out of the box workflows and business processes. Integration to line of business systems such as ERP, CRM and Content Management Systems are provided by both web service connectors and the MOSS Business Data Catalogue (BDC). The user interface is embedded inside Microsoft SharePoint and Microsoft Office applications, providing a familiar and configurable presentation platform for your users.

Figure 1: Architecture of the ContractExpress Generic Business Workflow



KEY FEATURES

Contract Workspace: Each user has a dashboard that, depending on their profile, shows which contract types are available to create and those they are working on.

Role based access: Organizes users by roles and approval authority to determine access to contract templates.

Request: A simple to use intelligent web questionnaire captures the key business information and commercial choices that need to be made about the contract you want to create.

Creation: Depending on the nature of the contract and the business terms within it, a fit for purpose document is automatically created. This is either provided to the users as a ready to execute PDF or routed via a workflow for legal review and approval.

Workflow: For every contract type flexible approval workflows can be configured to match your business processes.

Approve & Collaborate: Integration with email ensures other parties in the workflows are notified of requests for review or approval in real time.

Manage: A full version history of each contract is created and stored showing, who made what changes to the document and when.

Search & Report: Any data about contracts created in the system or the business terms within those contracts can be queried and sorted in standard or custom reports. Integration with Microsoft Office means reporting is easy to set up by non-technical business users and management.

SYSTEM REQUIREMENTS

SERVER

Minimum Hardware

- Dual Core 2.4GHz
- 1GB RAM
- 3GB of available hard disk space

Recommended Hardware

- Quad Core 2.4GHz
- 2GB RAM
- 3GB of available hard disk space

Software Requirements

- Windows 2003 Server or Windows 2003 Server R2 (Std or Enterprise)
- Internet Information Services 6.0
- Microsoft .Net Framework 2.0, 3.0 and 3.5 Runtime
- MS SQL Server 2005 Std Edition
- MS Windows SharePoint Services 3.0 or MS Office SharePoint Server 2007 (Std or Enterprise)

CLIENT

- MS Internet Explorer 7 or 8
- MS Word 2003 / 2007
- 1024x768 minimum screen resolution
- Adobe Reader 5 or above

My Recent Contracts				
Sales Contract				
Title	EntityFullName	Item Status	Workflow Status	Legal
2009-SLA-00005	Fidratech Corporation	Awaiting Approval		Awaiting Approval
2009-SLA-00004	Gigitech Inc	Draft		Requires Approval
2009-SLA-00003	Dundertech Inc	Approved		Approved

NDA				
Title	EntityFullName	Item Status	Workflow Status	Legal
2009-NDA-00007	Yelltech Inc	Awaiting Approval		Awaiting Approval
2009-NDA-00003	Dundertech Inc	Approved		Approved

Figure 2: The ContractExpress for SharePoint 'My Contracts' dashboard: Users can initiate the creation of new contracts and review the status of contracts in progress.

Data driven document creation engine

Automated assembly of contracts and associated documents is provided by a unique and patented document assembly engine. Business users can create configurable standard contracts without requiring involvement by a lawyer in the Legal department. Unlike the contract creation components of contract management and other systems, business users are not required to make legal decisions when creating a new contract. Contract templates are created by content area specialists who define the variations of clauses within a contract. ContractExpress presents users with business centric questions, concealing the complex legal language of the contract. The document assembly engine ensures that the appropriate pre-approved clauses and data are inserted into the assembled document.

Flexible workflow

The ContractExpress workflow component determines if the contract is standard or non-standard by applying business rules to the contract data. If the contract is standard then the business user can access the contract and send it on to the other party for signature. If the workflow component determines that the contract request requires approval, an approval task item is automatically created and routed to the Legal team for approval. These approval workflows ensure that Legal specialists and commercial managers are utilized only for the exceptions rather than every contract request. The business rules which define a standard contract are configurable, as are the groups of users required to approve the contract.

Management Information

ContractExpress gives contract administrators an overview of pending contract requests and completed contracts. Contracts can be viewed by type, originator, customer or any other data element captured during the creation and execution of the contract. By leveraging Microsoft SharePoint as the central contract repository, administrators and users can create alerts to receive emails when contracts are completed or hit key post execution events. Out of the box integration with Microsoft Excel enables contract administrators and senior managers to view management reports on key data elements of a contract.

"The idea was to provide the sales team with an easy and streamlined method for getting contracts out to our clients as quickly as possible, and to provide the sales teams and our clients with the most streamlined contracts possible."

Karen Gray, Thomson Reuters

Related Product: ContractExpress NDA for SharePoint

ContractExpress NDA for SharePoint is an enterprise-class, web based application optimized for the creation and management of Non Disclosure or Confidentiality Agreements (NDAs). The solution is designed to comprehensively meet the needs of organizations with large investments in Intellectual Property and who rely on NDAs to protect their assets. It delivers discrete value and benefits across the organization. For Sales management it offers decreased time to Transactions. For Legal and compliance management, it reduces risk and provides auditable certainty around the confidentiality obligations entered into by the organization, its business partners and customers.