





# Contract Types Table

The Contract Types table is a background table used to populate the Contract Type field of a Contract record. Each Contract Type record holds a value displayed as a choice in the Contract Type field. The Contract Type also determines the default approval workflow for the Contract record, the default document template for auto-generation of draft contract documents, the default question set for supplier evaluation, the risk conditions used for risk analysis, and the Task creation method.

| Contract Types           |   |      |                                  |   |                          | <a href="#">+ New</a>   | <a href="#">Views ▾</a> | <a href="#">Edit Fields</a> | <a href="#">More ▾</a> |
|--------------------------|---|------|----------------------------------|---|--------------------------|---|-------------------------|-----------------------------|------------------------|
| All Contract Types ▾     |   |      |                                  |   |                          | 13 record(s) found, 1 page(s). Click <a href="#">here</a> to count records again.   |                         |                             |                        |
| <input type="checkbox"/> | Edit  | ID ↓ | Contract Type                    | Default Workflow Title                                      | Has Document Template(s) |  | Uses Tasks              |                             |                        |
| <input type="checkbox"/> |  | 14   | Scope of Work (SOW)              | Contract Mgr, Legal, Compliance, and Risk Parallel Approval | No                       |   | Yes                     |                             |                        |
| <input type="checkbox"/> |  | 13   | Service Contract                 | Dept. Head and Legal Sequential Approval                    | Yes                      |   | Yes                     |                             |                        |
| <input type="checkbox"/> |  | 12   | Professional Services - Supplier | Manager and legal Sequential                                | Yes                      |   | Yes                     |                             |                        |

# Use Case

Contract Types can be created and edited by admins and Contract Managers. The Contract Type, Contract Type ID, Has Document Template(s), Default Document Template ID, and Contract Type Default Workflow ID, Extra Fields to Show are pulled into the Contracts table as a link to selected fields from the Contract Type table.

Contract Type records contain selections for various defaults, such as the Default Cost Type, Default Workflow, Default Document Template, etc. These selections are used to set the values of various fields and linked sets in the Contract record when the Contract Type is selected. In most cases, these values can be manually changed by the user in the Contract record.

If the Has Document Template(s) field value is Yes, additional fields in the Contract record are visible: Document Template to Generate and Create and Attach (an action button).

Save

Cancel

Contract Type: Non-Disclosure Agreement

ID

7

Status

Active

Sort Order

2

Contract Type

Self-serve Settings

Related Records

Tasks and Obligations

History

<<>>

\*Contract Type

Non-Disclosure Agreement

\*AI Document Type

Nondisclosure Agreement

Required Clause Types

Available for Record Types

☒ Contract
☐ Child Contract
☒ Amendment

\*Party Type

Supplier

\*Default Cost Type

Zero Dollar

This field can be used to show or hide fields in the Contract by making them visibility dependent on whether this field (when pulled into the Contract along with the Contract Type) contains a value. If you do not choose Locations, then that field will not be displayed in the Contract.

Extra Fields to Show

Description

has clauses with numbering in them, conditional based on renewal type=evergreen or not

Has Document Template(s)

☒ Yes
☐ No

\*Uses Tasks

☒ Yes
☐ No

The Self-serve Settings tab contains various options related to the self-serve workflow used in Contract Requests. For each Contract Type, one can determine whether self-serve is available. Setting it to "No" will require Contract Requesters to always submit Contract Requests for that Contract Type for review by the Contract Management Team. If it is set to "Yes", defaults for values related to the contract term, such as Renewal Type, can be selected. Additionally, one can choose to prevent changes to the default, so that Contract Requesters cannot change the provided values when using the self-serve workflow.

Contract Type
Self-serve Settings
Related Records
Tasks and Obligations
History
«»

Self-serve Available?
☒ Yes
☐ No

\*Default Renewal Type
Notify staff to renew

\*Default Contract Term in Months
36

Prevent Changes to Default for Self-serve
☒ Yes
☐ No

User Instructions for Term and Renewal Type
This Contract Type does not allow changes to renewal type and term for self-serve Contracts.

You can view all associated document templates, workflows, and risk conditions on the Related Records tab of a Contract Type record.

Contract Type
Related Records
Tasks and Obligations
History
«»

[Collapse All](#)

Available Document Templates

Status: 2 record(s) found, 1 page(s). Click [here](#) to count records again..

New
Select Print Template
Unlink
Save Changes
Cancel Changes

| <input type="checkbox"/> Edit | ID                 | Related To | Title  | Status | Template File  | Blank Form                     |
|-------------------------------|--------------------|------------|--|--------|--|--------------------------------|
| <input type="checkbox"/>      | <a href="#">21</a> | Contracts  | NDA with Complex Clause Numbering in Column Format (AdobeSign) | Active | <a href="#">nda-normalwithnumbering-adobesign.docx</a> | <a href="#">nda-blank.docx</a> |
| <input type="checkbox"/>      | <a href="#">12</a> | Contracts  | NDA with Complex Clause Numbering in Column Format (DocuSign)  | Active | <a href="#">nda-normalwithnumbering.docx</a>           | <a href="#">nda-blank.docx</a> |

Default Document Template Title
NDA with Complex Clause Numbering in Column Format (DocuSign)
Document Template File

Available Workflows

Status: 4 record(s) found, 1 page(s). Click [here](#) to count records again..

New
Select Workflow
Unlink
Save Changes
Cancel Changes

| <input type="checkbox"/> Edit | ID                | Workflow Title  | Status | Related To | Number of Approvals |
|-------------------------------|-------------------|---|--------|------------|---------------------|
| <input type="checkbox"/>      | <a href="#">7</a> | Dept. Head Review, Finance, Conditional Compliance, and Legal Sequential Approval | Active | Contracts  | 4                   |
| <input type="checkbox"/>      | <a href="#">5</a> | Dept. Head and Legal Sequential Approval  | Active | Contracts  | 2                   |
| <input type="checkbox"/>      | <a href="#">4</a> | Requester Manager, conditional Finance, and Legal                                 | Active | Contracts  | 4                   |
| <input type="checkbox"/>      | <a href="#">1</a> | Legal Approval (One Step)   | Active | Contracts  | 1                   |

From here, you can use the related table action bar to Unlink a document template, workflow, or risk condition from the contract type record if necessary.

The availability of the Task tab and Task fields within the Contract record are controlled by the Uses Tasks field on the Contract Type tab. When Uses Tasks is set to Yes, the Tasks tab appears after the Document Templates and Workflows tab of the Contract Type record. The Contract Manager or Admin should then define the Task Generation Method and define if Ad Hoc Tasks can be added on the Contract.

The Task Generation Method field has three options:

- Predefined Task Workflow
- User Selected Tasks
- User Generated Ad-Hoc Tasks

The following sections describe how to use each of the Task Generation Method options:

## Predefined Task Workflow

This method should be used when the tasks that need to be completed are standard for the current contract type. Enable Ad Hoc Tasks can be set to yes to allow the creation of unique tasks from the Contract record. To create a predefined task workflow:

1. Ensure that Uses Tasks is set to Yes on the Contract Type tab.
2. On the Tasks tab, click Create New Task Workflow. Refer to [Task Workflow](#) for more information. The new workflow appears.
3. Define the Default Task Workflow Title.
4. Once the Default Task Workflow Title is defined, the Task Templates for the selected workflow appear below. To edit these task templates, refer to the [Task Template](#) section.

## User Selected Tasks

This Task Generation Method allows for the user to select the appropriate tasks from a multiple choice check box on the Contract before generating the tasks.

1. Click Create New Task Template to create the associated tasks.
2. Define the User selectable for Contract Types field if it has not been set. Refer to the [Task Template](#) section for more information on creating task templates.

## User Generated Ad Hoc Tasks

Select this Task Generation Method if there are no standard tasks associated with a contract type, and the user should be able to create tasks manually.

# Obligations

A Contract Type can have one or more default Obligations associated with it. Setting the 'Has Default Obligations' choice field to 'Yes' allows the user to create or select default Obligations. Clicking the 'Create New Default Obligation' creates a new Task Template with Task Type set to Obligation. Most of the options are the same as we saw above with Tasks. There are a few additional fields:

- **User Selectable for Contract Types:** Select all the Contract Types for which this Obligation can be made one of the defaults. The Contract Type from which the user creates the Obligation is automatically added here. Note that after selecting additional Contract Types, the user must go into each one and select the Obligation as a default.
- **Obligation Type:** The party that is responsible for the Obligation - Customer, Internal, Customer and Internal, Partner, or External.
- **Obligation Output:** The expected output for this Obligation, such as report, payment, document, etc.

The lookup icon on the Action Bar allows the user to select Obligation templates that are available for the current Contract Type.