Contract Management

Bizagi Modeler

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Stakeholders (Stakeholder documentation)

**Version:** 1.0

**Author:** DiegoO

Main Process

Process Elements

Activity

**Process**

[Contract owner (Stakeholder documentation) - Main Process](#ebf74755-7805-4751-af1c-81ff7a9281d7)

Activity

**Process**

[Consenter (Stakeholder documentation) - Main Process](#e983c622-f058-4706-b667-8c2a2b701181)

Activity

**Process**

[Legal area worker (Stakeholder documentation) - Main Process](#f4521e3f-9920-4db0-9514-9a837afee08d)

Legal area worker

**Description**

Is every employee from the legal department able to participate in contract management.

Contract owner

**Description**

Can be any employee empowered to request contracts within the company.

Consenter

**Description**

Is every contract owner and the legal representative. This is due to the necessity of consent from the contract owner and the company legal representative.

Consenter (Stakeholder documentation)

**Version:** 1.0

**Author:** DiegoO

Main Process

Process Elements

Audit contract

**Description**

Queries the contract request, displaying all the information related to every version of the contract.

**Associated form**

**Applied to all Stakeholders**

No

**Can be launched from:**

Me

**Is visible when:**

Always

Search contracts

**Description**

Allows the stakeholder to search all the contracts saved, and filter the search results.

**Search form**

Contract owner (Stakeholder documentation)

**Version:** 1.0

**Author:** DiegoO

Main Process

Process Elements

Activity

**Process**

[Contract tracking - Contract tracking](#a0bc42f2-e344-4fa8-bdee-68008f01ba6b)

Activity

**Process**

[Assess Draft - Assess draft](#fd609027-4ae0-4081-b4cd-4a6ebedd627a)

Attach an alert

**Description**

Launches a new instance of the Contract Tracking process, allowing the user to relate alerts and register feedback from meetings regarding the contract.

**Is a batch action?**

No

**Applied to all Stakeholders?**

No

**Can be launched from**

Me

**Is visible when:**

Always

Request draft assessment

**Description**

Starts the Assess draft process. This acction allows the contract owner to require assessments to any user enabled to assess a contract.

**Is a batch action?**

No

**Applied to all Stakeholders?**

No

**Can be launched from**

Me

**Is visible when:**

Always

Audit contract

**Description**

Queries the contract request, displaying all the information related to every version of the contract.

**Associated form**

**Applied to all Stakeholders**

No

**Can be launched from:**

Me

**Is visible when:**

Always

Search contracts

**Description**

Allows the stakeholder to search all the contracts saved, and filter the search results.

**Search form**

Legal area worker (Stakeholder documentation)

**Version:** 1.0

**Author:** DiegoO

Main Process

Process Elements

Activity

**Process**

[Contract tracking - Contract tracking](#a0bc42f2-e344-4fa8-bdee-68008f01ba6b)

Activity

**Process**

[Update contract status - Update contract status](#afd2fb1b-bbaf-4452-b6b8-1fef7971103e)

Activity

**Process**

[Update contract status - Update contract status](#afd2fb1b-bbaf-4452-b6b8-1fef7971103e)

Activity

**Process**

[Update contract status - Update contract status](#afd2fb1b-bbaf-4452-b6b8-1fef7971103e)

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Activity

**Process**

[Update contract status - Update contract status](#afd2fb1b-bbaf-4452-b6b8-1fef7971103e)

Attach an alert

**Description**

Launches a new instance of the Contract Tracking process, allowing the user to relate alerts and register feedback from meetings regarding the contract.

**Is a batch action?**

No

**Applied to all Stakeholders?**

No

**Can be launched from**

Me;Processess

**Is visible when:**

Always

Audit contract

**Description**

Queries the contract request, displaying all the information related to every version of the contract.

**Associated form**

**Applied to all Stakeholders**

No

**Can be launched from:**

Me

**Is visible when:**

Always

Update status from draft

**Description**

Updates every selected contract status, and then notifies every participant.

**Is a batch action?**

Yes

**Applied to all Stakeholders?**

No

**Can be launched from**

Me

**Is visible when:**

The current status of the contract is a draft.

Update status from In renewal

**Description**

Updates every selected contract status, and then notifies every participant.

**Is a batch action?**

Yes

**Applied to all Stakeholders?**

No

**Can be launched from**

Me

**Is visible when:**

The current status of the contract is a renewal.

Update status from In negotiation

**Description**

Updates every selected contract status, and then notifies every participant.

**Is a batch action?**

Yes

**Applied to all Stakeholders?**

No

**Can be launched from**

Me

**Is visible when:**

The current status of the contract is In negotiation.

Update status from Released

**Description**

Updates every selected contract status, and then notifies every participant.

**Is a batch action?**

Yes

**Applied to all Stakeholders?**

No

**Can be launched from**

Me

**Is visible when:**

The current status of the contract is Released.

Update status from Locked

**Description**

Updates every selected contract status, and then notifies every participant.

**Is a batch action?**

Yes

**Applied to all Stakeholders?**

No

**Can be launched from**

Me

**Is visible when:**

The current status of the contract is Locked.

Search contracts

**Description**

Allows the stakeholder to search all the contracts saved, and filter the search results.

**Search form**

Contract Management

**Version:** 1.0

**Author:** DiegoO

**This process can be started from:**

New Case

Contract Management

**Description**

The example explained in this document is depicting a Contract management unstructured process, where any sort of contract can be driven from its request to its expiration. Since a process to thoroughly manage any kind of contract would have to consider an enormous number of situations, this process approach is rather general, relying in the tools offered by Bizagi to manipulate every case and task differently.

Scope: The process starts when a contract is required and a Contract owner creates a request which, with assessment of internal employees and defined participants (acting as representatives of the other parties of the contract), results in a released contract. Any modification to the status of the contract is supported, as well as meeting alarms and tracing. Nonetheless, this process does not support direct management of the document itself, namely terms and conditions, policies, constraints, etc.

As mentioned before, this process heavily relies on the use of Bizagi 11 features options, taking advantage of the Experience Design concept to depict an unstructured process.

Unstructured processes are those which you may catalog as highly unpredictable or dynamic, mainly because these processes may involve, at some point, a very large number of possible workflow alternatives.

It represents how the Stakeholders (knowledge workers) are able to make decisions to define the flow of a case, that cannot be predicted beforehand.

The scope of the Contract management case is the assessed release of a contract and the control of its meetings and status changes.

Through Experience Design you will be able to make the most of: Empowering knowledge workers, presenting a personalized user experience, and using contextualized BPM capabilities, among others.

Process Elements

Event

Gateway

Save digital copy of signed contract

**Description**

Prompts for a digital signed copy of the accepted contract.

**Performers**

Legal team employee

**Form:**

**Notify assignment**

No

Gateway

**Description**

This gateway enables the Cancel request event so that the requester can execute it if consider it necessary at any time.

Request approval and receive feedback

**Description**

This process allow the contract owner to register all participant's feedback and their approval.

**Loop type**

Multi-Instance

**MI Ordering**

Parallel

**Flow Condition**

All

**Process**

[Request approval and receive feedback - Request approval and receive feedback](#db3f05cc-6713-49df-8125-6d0b535ef176)

Is Approved?

**Description**

This gateway identifies whether all participants approved the contract version.

**Gates**

**Yes**

**Condition**

All participants approved the contract version.

**No**

**Condition**

At least one participant rejected the contrac version.

Gateway

Notify draft denial

**Description**

Notifies all participants about the contract version denial through e-mail.

**On exit actions**

Rule to create the e-mail that inform the participants regarding the contract version denial.

Notify contract acceptance

**Description**

Notifies all participants about the contract version acceptance through e-mail.

**On exit actions**

Rule to create the e-mail that inform the participants regarding the contract version acceptance.

Event

Notify cancellation

**Description**

Notifies all participants about the contract cancellation through e-mail.

**On exit actions**

Rule to create the e-mail that must be sent in this task.

Start

**Description**

Starts a new contract request, allowing the user to select participants, what sort of contract will request and an existing base contract if needed.

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Exit | Automatically fills information in attributes such as the contract owner, request date, initial version consecutive, and the case number. |

Register cancellation

**Description**

Registers a new cancelled status in the log, and updates the current status to cancelled.

**On exit actions**

Rule to add a new status log as "Cancelled", and updates the current status of the contract as cancelled.

Cancel request

**Description**

If the contract is meant to be cancelled, the contract owner must provide explanation regarding its new status.

Enable contract execution

**Description**

Sets the contract as available, to be refered in other processes.

**Performers**

Contract Owner

**Form:**

**Notify assignment**

No

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Exit | Add a new log record with the status "Released" and update the current status of the contract as "Released". |

Draft authoring

[Go to details](#a2020b05-10db-41f3-bf64-ffc8558844c8)

**Description**

This process ensures a version approved and consented by the contract owner and the legal representative, in order to be ready for external parties to assess.

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Enter | Create a new log record with the "Draft" or "Renewal" status, whether the renewal option is selected or not. |
| On Enter | Assign a new identifier to the current contract request. |
| On Exit | Create a new log record with the status "In negotiation". And set the contract current status as "In negotiation". |

Employee

Legal Team Employee

Contract Request

Contract Authoring

Contract Negotiation and Approval

Contract Signing

Draft authoring

Process Elements

Edit draft

**Description**

Configure the contract lines, set terms and conditions, define payment structure and add additional contract data for the draft. The contract must be uploaded as a document.

Define the required approvals and the for the contract. Furthermore, the case displays the history of modifications and feedbacks, as well as the option to cancel the creation of the contract.

**Performers**

Contract Owner

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Enter | Create a new contract version copying the current attachment file. Add the new version to the versions log. |
| On Enter | If it is the first version of the contract and it has been set as a renewal, copy the base contract file to the new contract. |
| On Exit | Check if at least one assessment has been required. Otherwise, do not allow the task to continue.  |

Is Approved?

**Description**

This gateway verifies if all assessments resulted in a positive review.

**Gates**

**No**

**Condition**

If at least one assessment is a rejection of the current version of the contract.

**Yes**

**Condition**

If all assessments resulted in the current version acceptance.

Contract requester consent

**Description**

Prompts for consent of the current contract version to be presented to the external parties.

**Performers**

Consenter

**Notify assignment**

No

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Enter | Automatically set the assignation date and the contract owner to assign the task. |
| On Exit | Register the time in which the consent was given. |

Gateway

**Description**

This gateway is a convergence point after the consent from both performers is registered.

Event

All approbations finished

**Description**

When all assessments are finished, the process continue.

Legal representative consent

**Description**

Prompts for consent of the current contract version to be presented to the external parties.

**Performers**

Consenter

**Notify assignment**

No

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Exit | Register the time in which the consent was given. |
| On Enter | Automatically set the assignation date and the legal representative to assign the task. |

Gateway

**Description**

This gateway enables the legal representative and a the contract owner to give the final consent to the version, in order to present it to the external parties.

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Exit | Set the current version as a version which needs consent. |

Event

Assess Draft

**Version:** 1.0

**Author:** DiegoO

**This process can be started from:**

Actions

Assess draft

**Description**

This process allows the evaluation of a contract version before any third party review. The evaluator registers its feedback and approval or rejection.

Process Elements

Start

**Description**

This start the process when a new assess is required after a draft modification, allowing the contract owner to select the evaluator.

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Exit | Assign the current date to the assessment request date attribute. |

Event

Assess Draft

**Description**

Register all observations, recomendations and corrections to the draft, as well as the approval or rejection of the current draft.

**Performers**

Evaluator

**Form:**

Evaluator

Request approval and receive feedback

**Version:** 1.0

**Author:** DiegoO

Request approval and receive feedback

**Description**

This process is intended to send the contract and register the version feedback from every participant (External party).

Process Elements

Start

**Description**

Creates an instance of the process.

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Exit | Assign the current contract version attribute to the contract to be evaluated attribute. |

Receive feedback

**Description**

Receive and register all feedback given from each participant.

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Exit | Record the date in which the feedback was registered. |

Event

Send draft for approval

**Description**

Send the current version to participants for approval.

**On exit actions**

Send an email with the draft.

Contract owner

Contract tracking

**Version:** 1.0

**Author:** DiegoO

**This process can be started from:**

Actions

Contract tracking

**Description**

This process is aimed to keep a control of milestones and register feedback of meetings regarding the contract.

Process Elements

Register audit feedback

**Performers**

Legal team employee

**Notify assignment**

No

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Enter | Create a new meeting in the log. |
| On Exit | Set the current date to the registered meeting date. |

Convergence

**Description**

This gateway is a convergence point.

**Gates**

**Date alarm**

Start

**Description**

When starting the process, select when will the alert be launched, if is a meeting and its description.

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Exit | Set the alarm creation time as now. |

Program upcoming alert

**Description**

Allows the user to select when will the alert be launched, if is a meeting and its description.

**Performers**

Legal team employee

More alerts upcoming?

**Description**

If a new milestone is required proceed to register its details. Otherwise, end the process.

**Gates**

**No**

**Condition**

If any alert is required.

**Yes**

**Condition**

If a new alert is required.

Inform participants

Is a meeting?

**Description**

This gateway evaluates if the new alarm was created due to a meeting.

**Gates**

**No**

**Condition**

Do not alert any participants if the next milestone is not a meeting.

**Inform participants**

**Condition**

Inform the participants in case there is an upcoming meeting.

Gateway

**Description**

This gateway is a convergence point.

**Gates**

**More alerts upcoming?**

Convergence

**Description**

This gateway is a convergence point.

**Gates**

**Convergence**

Send status message to participant

**Description**

Send an e-mail to the participants in order to make them aware of the new milestone.

**On exit actions**

Send an e-mail defined to raise awareness of the new milestone.

Date alarm

**Description**

This event waits for the alarm time to let the flow continue.

**Timer Date**

2016-08-03T00:00:00

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Enter | Set the event execution time given in previously in the process. |

No more upcoming alerts

Is audit meeting?

**Description**

This gateway decides if the milestione requires to register feedback from a meeting based on what the process owner specified previously.

**Gates**

**No**

**Condition**

If is not a meeting, do not register its feedback.

**Yes**

**Condition**

If is a meeting, register its feedback.

Save feedback externally

**Description**

Uses a connector to store the meeting feedback in Evernote.

**Implementation**

Unspecified

Legal team member

Update contract status

**Version:** 1.0

**Author:** DiegoO

**This process can be started from:**

Actions

Update contract status

**Description**

This process manages the status changes of multiple processes.

Process Elements

Manage status change

**Description**

Updates the status for the selected contracts.

**On exit actions**

For each contract, add a new status record to its log and set the current status as the one selected at the process start.

Notify participants

**Description**

Notify all related participants regarding the new contract status through e-mail.

**On exit actions**

Send an e-mail to all related participants raising awareness of the no contract status.

Start

**Description**

Once the contracts have been selected, select a new status and the description of the change.

**Actions**

|  |  |
| --- | --- |
| **Type** | **Description** |
| On Exit | Record the user and time of the update request. |

Event

Resources

Contract Owner (Entity)

**Description**

This is the Contract Owner Stakeholder.

Consenter (Entity)

**Description**

This is the Consenter Stakeholder.

Legal team employee (Entity)

**Description**

This is the Legal team employeeStakeholder.

Evaluator (Role)

**Description**

An evaluator is basically any user with the custom property "Allowed to evaluate contracts" turned on.