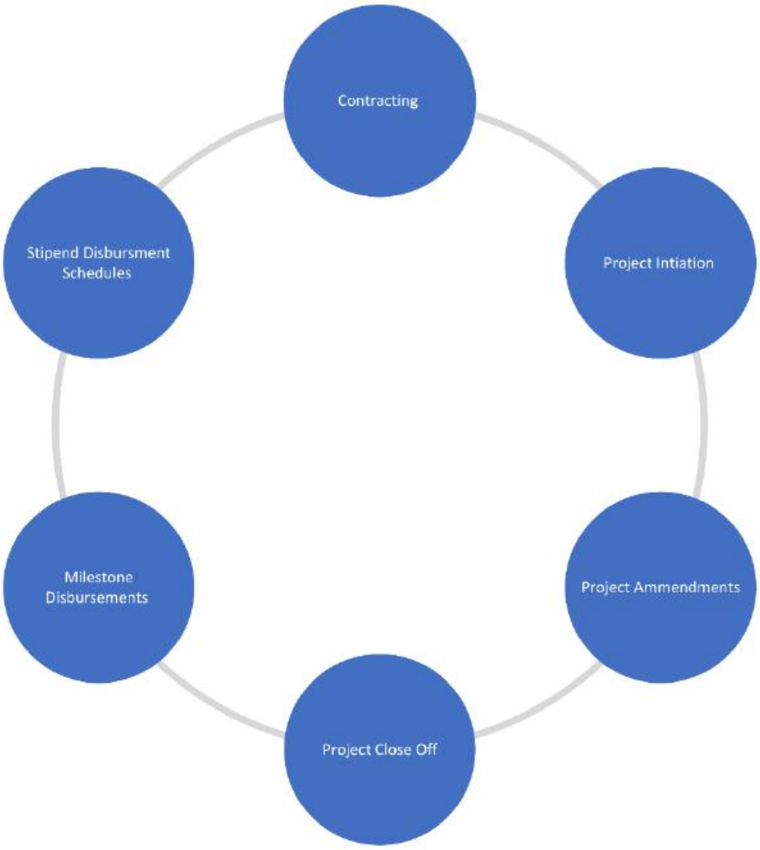


CONTRACT MANAGEMENT

Training Manual

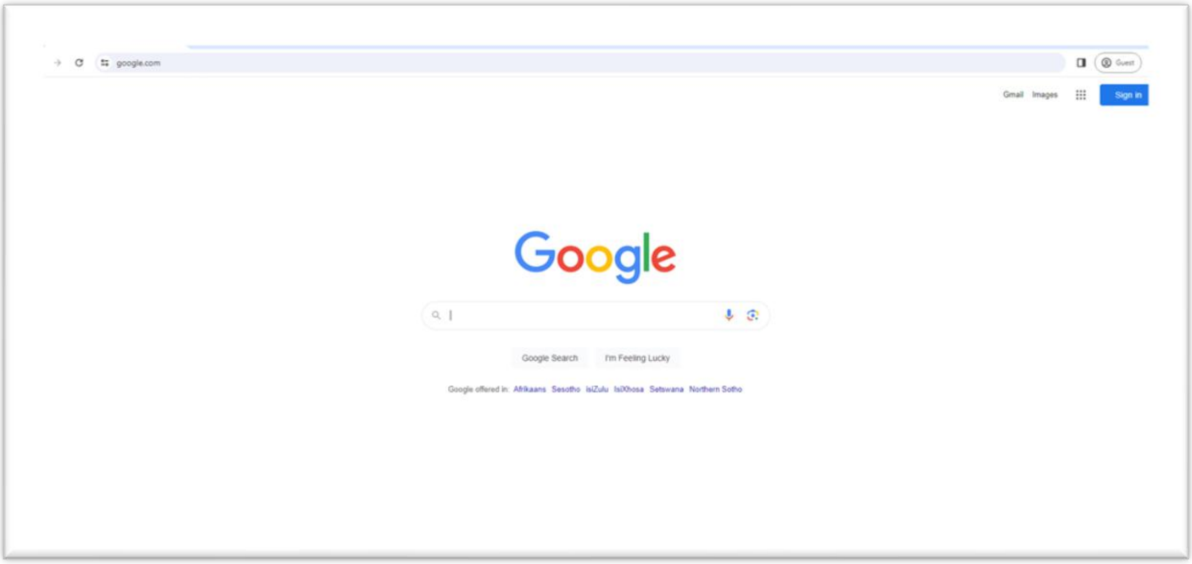
TABLE OF CONTENT

1 OVERVIEW

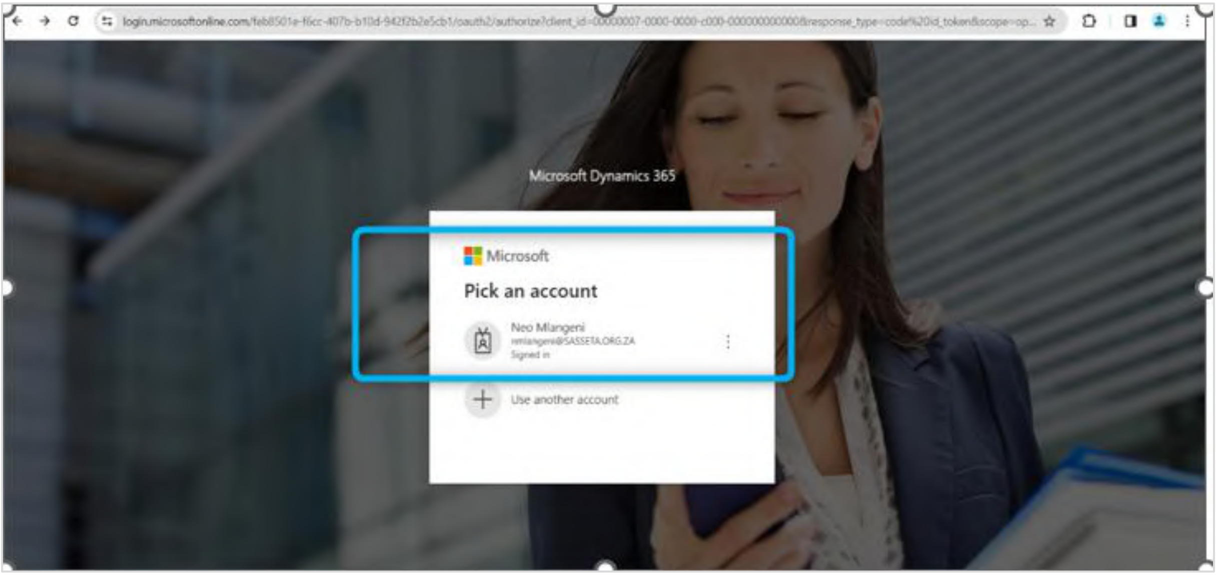
Microsoft Dynamics 365 for Contract Management is designed to define and streamline contracting and project management processes, providing users with a centralized point of reference for the efficient management of project milestones, stipend disbursements.

- Contract Signing
- Contract Addendum
- Project Management
- Project Close

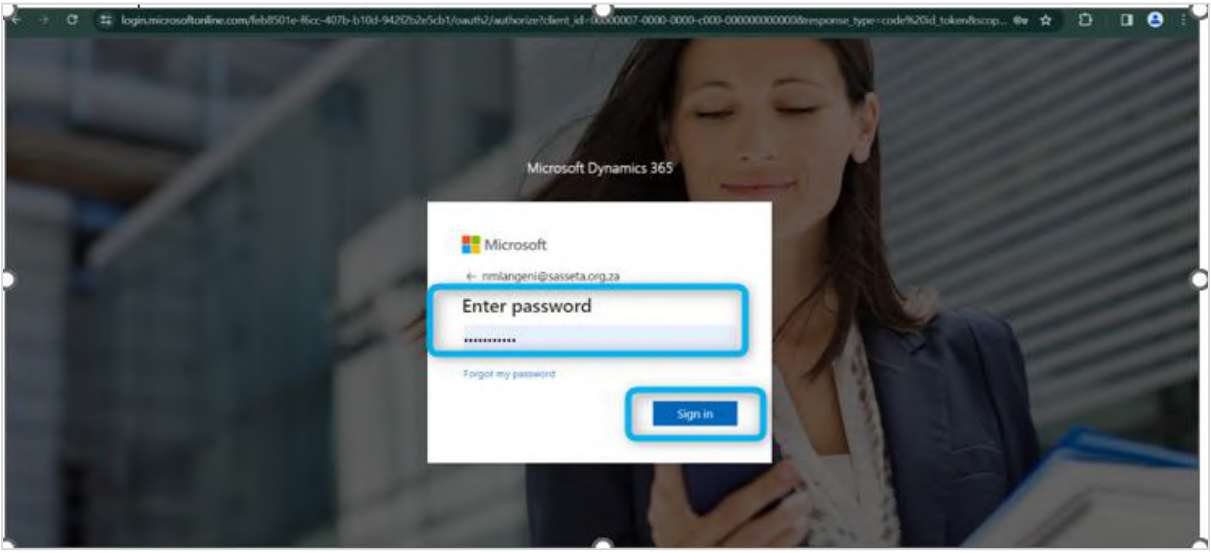
2 HOW TO LOGIN INTO THE IMIS



Step	Action
1.	Launch the internal system: • Open any browser of your choice. • Insert the following URL into your browser: https://sasseta-imis-aut.crm4.dynamics.com/ • Click enter.



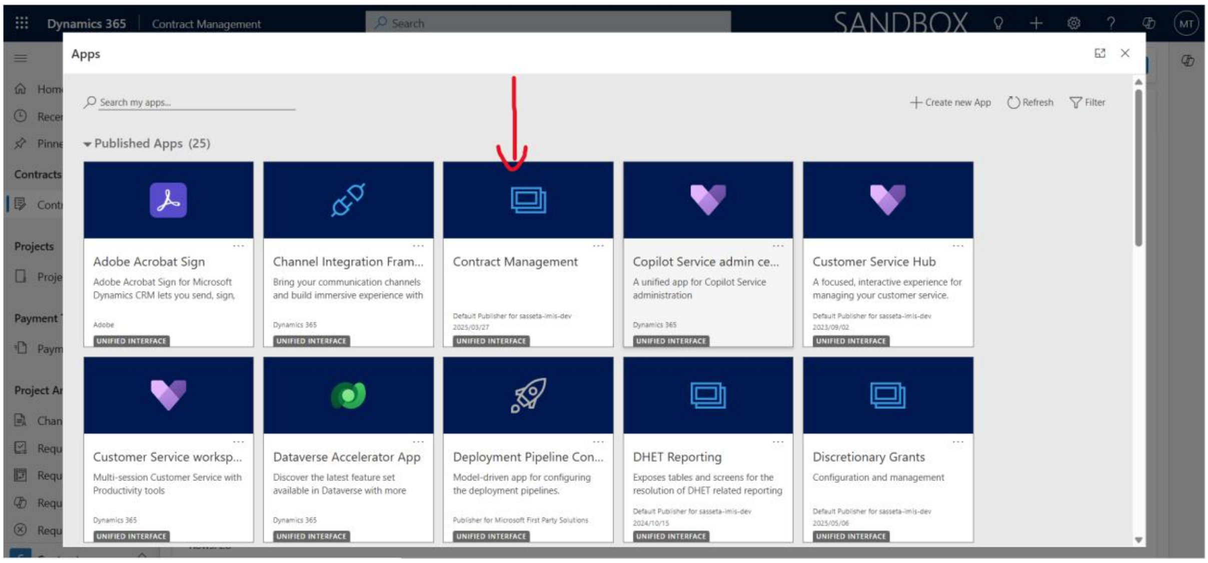
Step	Action
2.	You will be prompted to sign in with your SASSETA account. • Click the **e-mail** textbox. • Type in your valid e-mail address • Press enter



Step	Action
3.	• Click the **Password** textbox. • Type in your password • Click the **Sign in** button

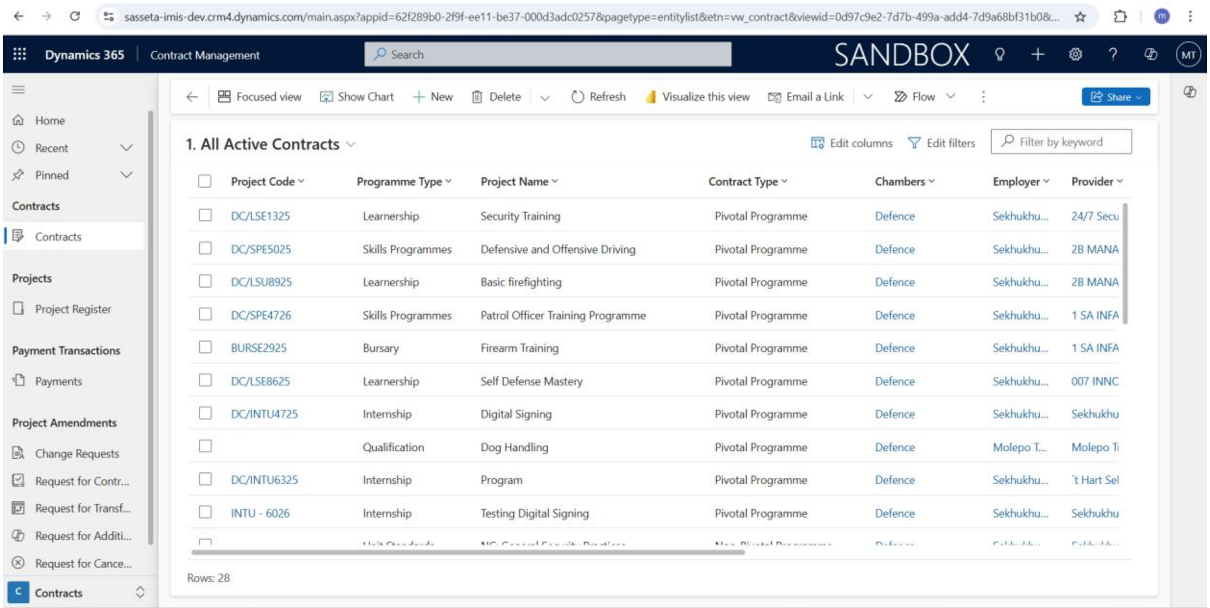
3 CONTRACT MANAGEMENT APP

Apps provide a collection of functionalities for accomplishing a specific class of activity, such as managing your contracts and project. Click Employer management App.



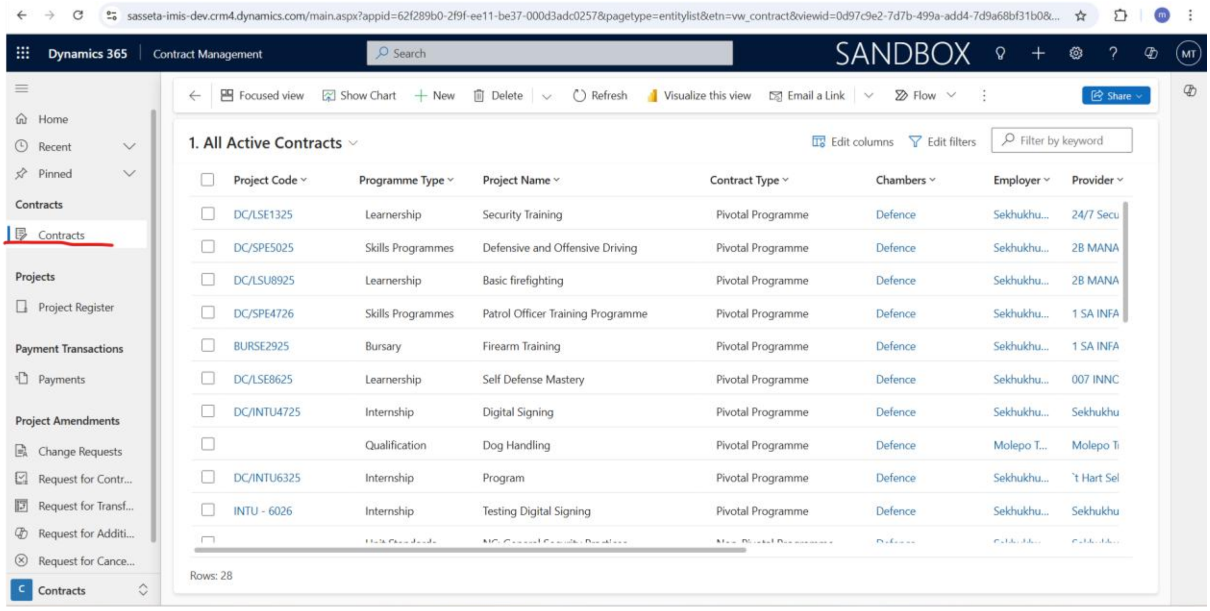
Step	Action
4.	Application Is Running: Note that the respective application icon appears in the browser tab if the application is running. • Click the **Contract Management** app. • The Contract Management form will be opened.

4 NAVIGATION



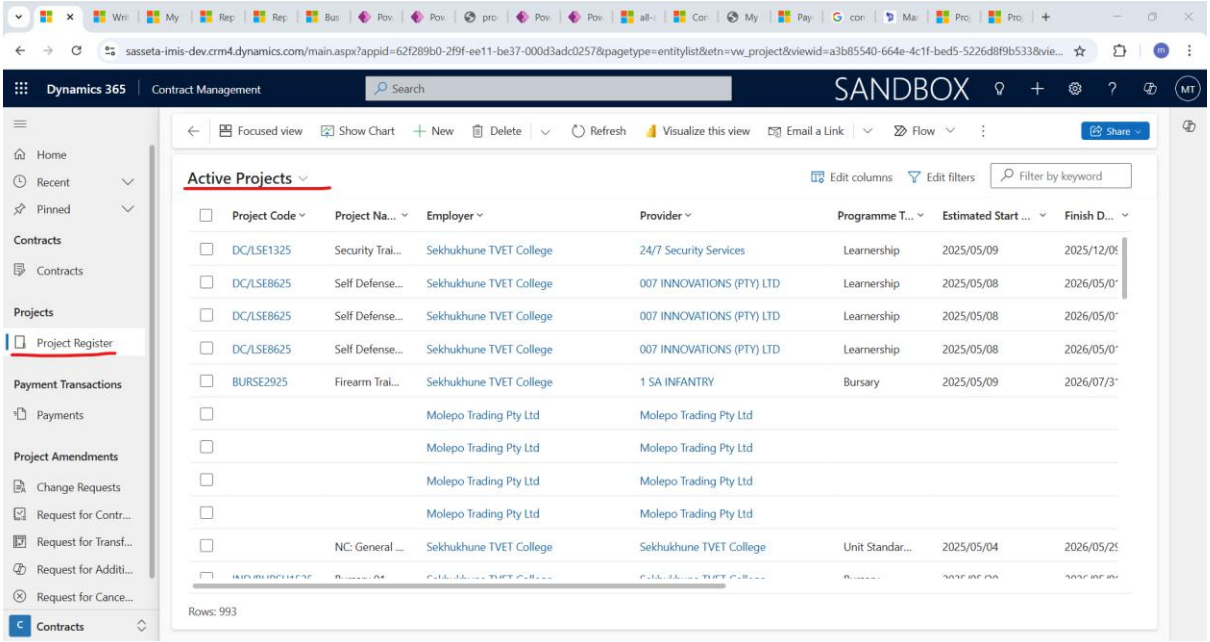
1. Site URL.
2. Contracts records
3. Project records
4. Payments Records
5. Project Amendments
6. Contracts Change Area

4.1 CONTRACT RECORDS



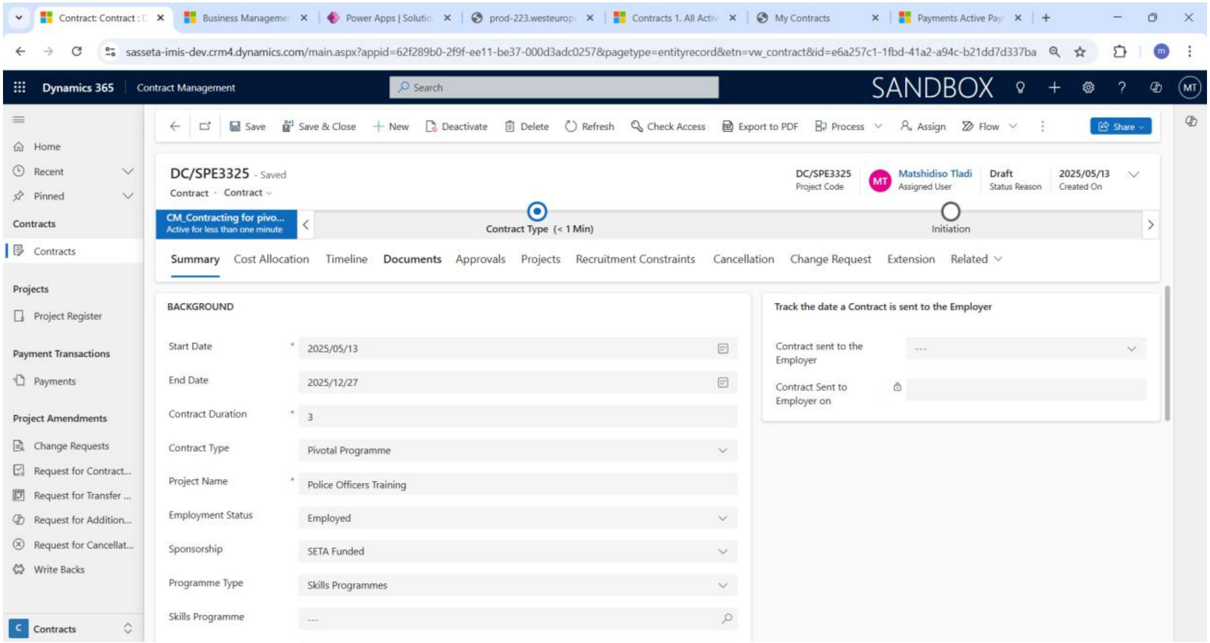
- Contract views
    - All Active Contracts
    - Pivotal
    - Non-Pivotal
    - Unemployment Bursaries
    - Inactive Contracts

4.2 PROJECT REGISTER



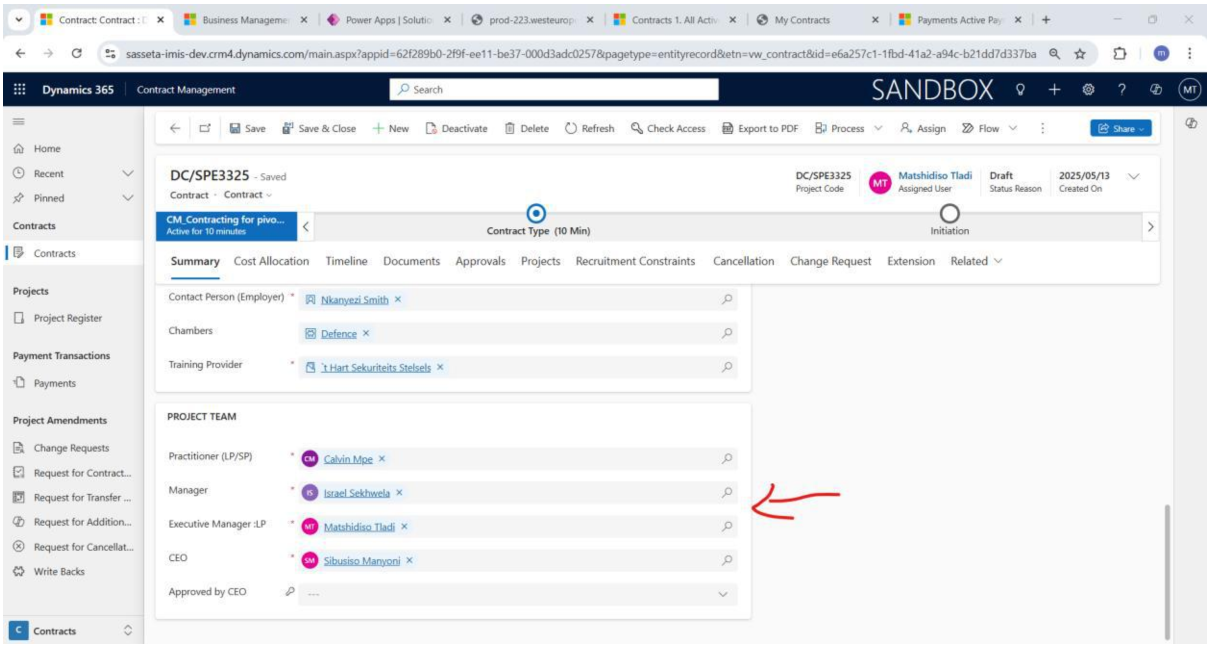
- Project Register views
    - Active Projects
    - Inactive Projects
    - Industry Funded Projects
    - My Projects
    - Non-Pivotal Projects
    - Pivotal Projects
    - Unemployment Bursaries

5 CONTRACT TEMPLATING

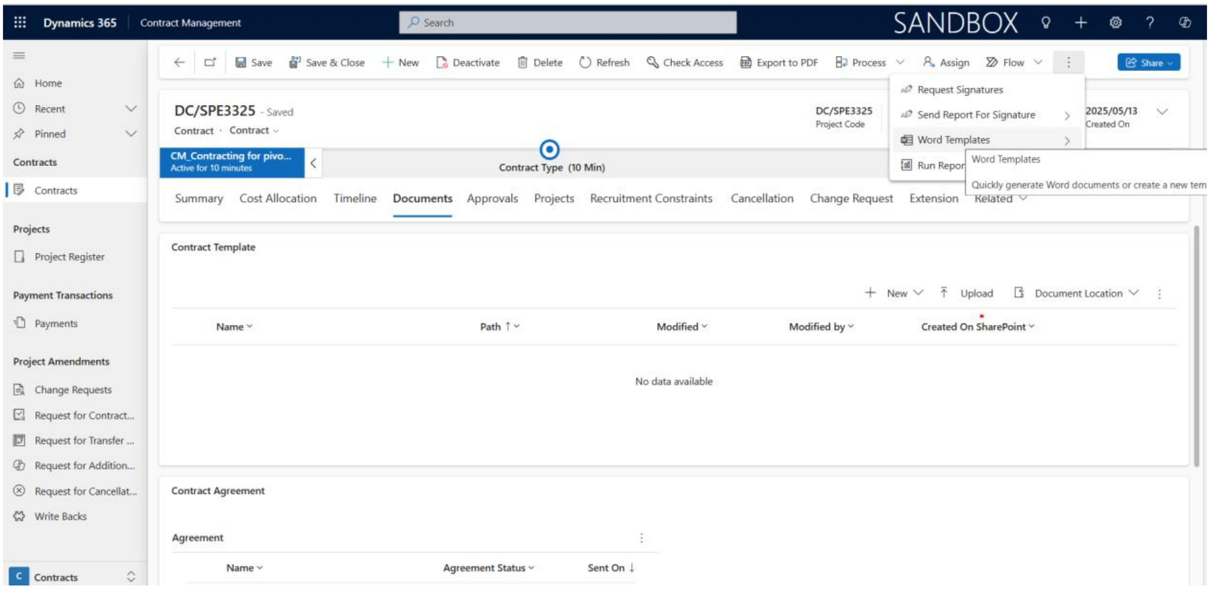


- **Step 1** Upon opening a contract, the following information will be automatically populated from DG:
  Background Information
  Parties Involved
  Cost Allocation

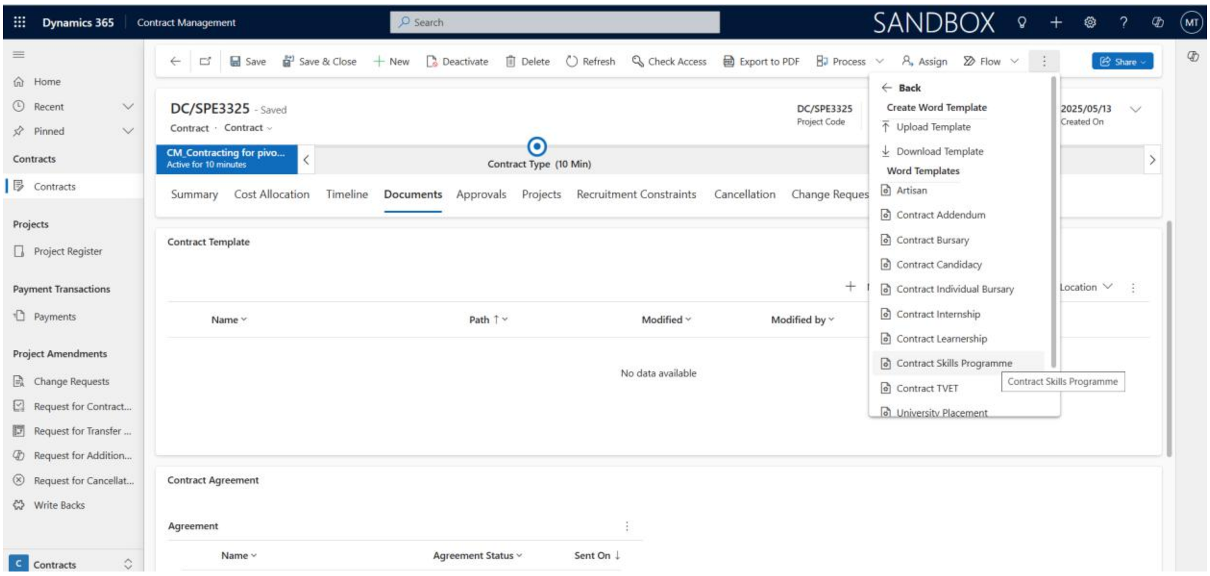
- **Step 2** Data to be populated by the practitioner: Project Team Information



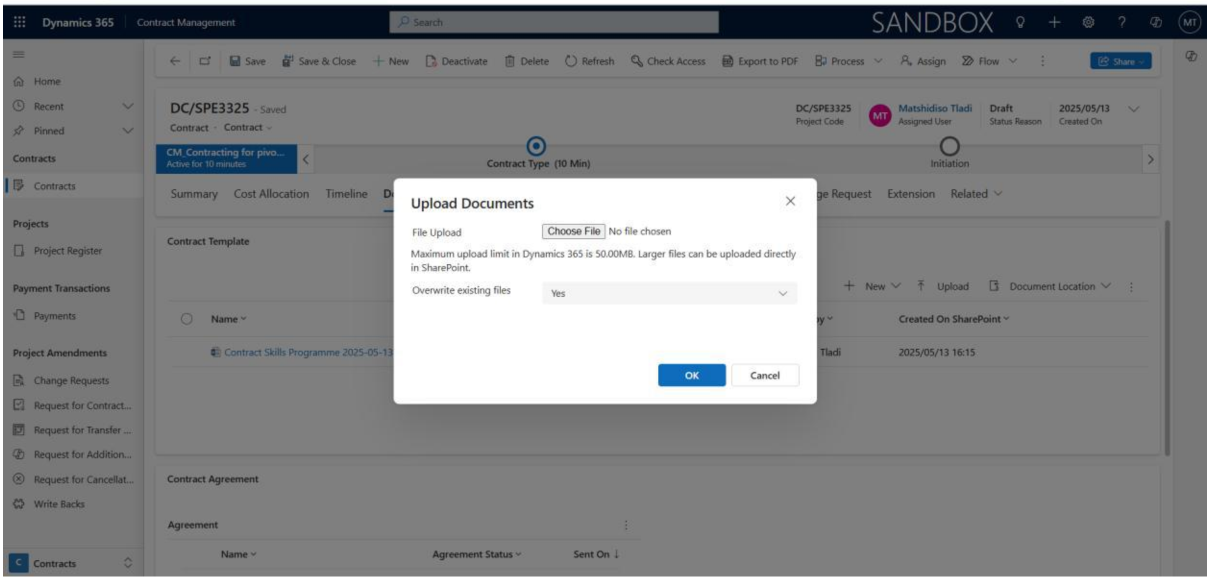
- **Step 3** Download Contract: Download Contract Template and Send to Employer for approval.



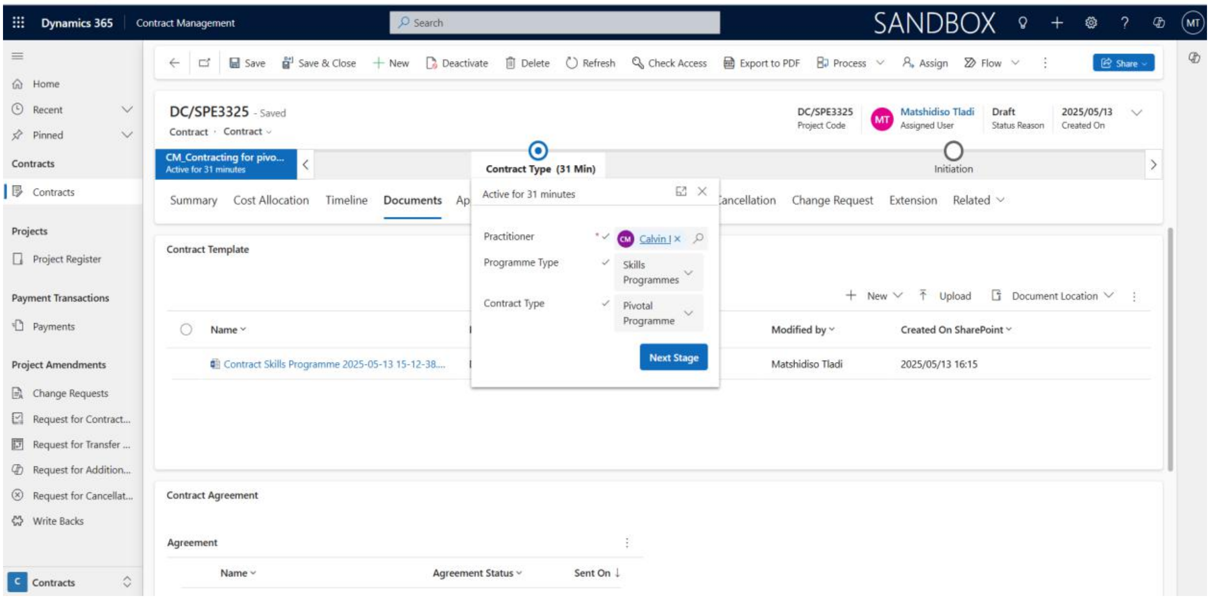
NB: Ensure the selected contract the selected template matches the contract programme type.



- **Step 4** Upload Approved Contract Template:
  - On receiving the approved contract template
  - Navigate to Documents section.
  - Click On Upload
  - Choose the contract template on local Machine.
  - Upload the Contract

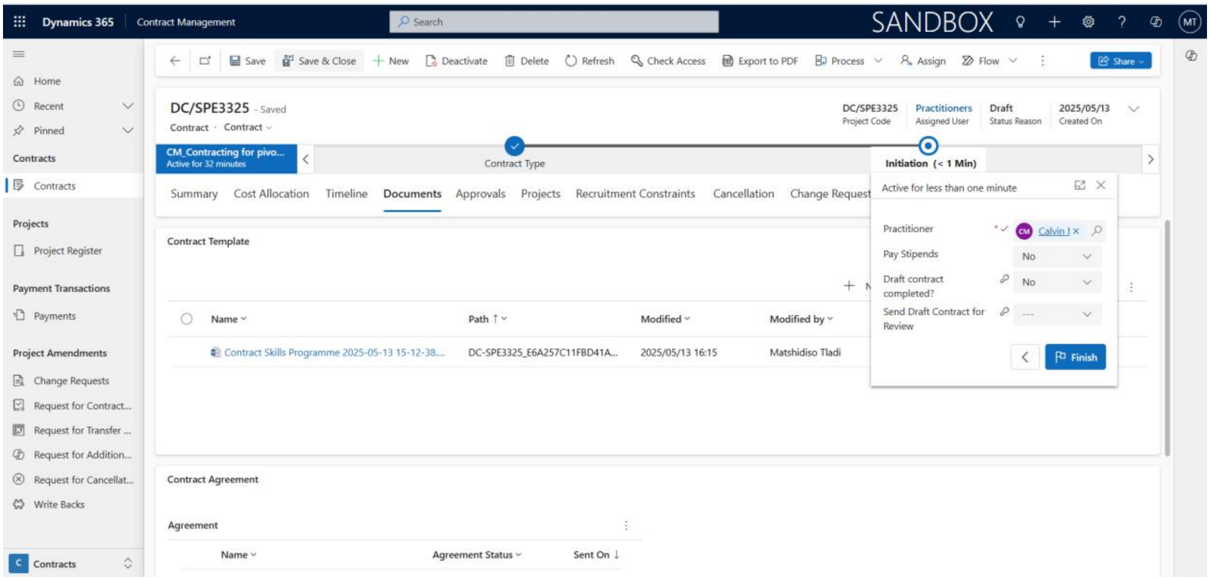


Step 4: Navigate to Contract Business Process, on Contract type stage click on next stage

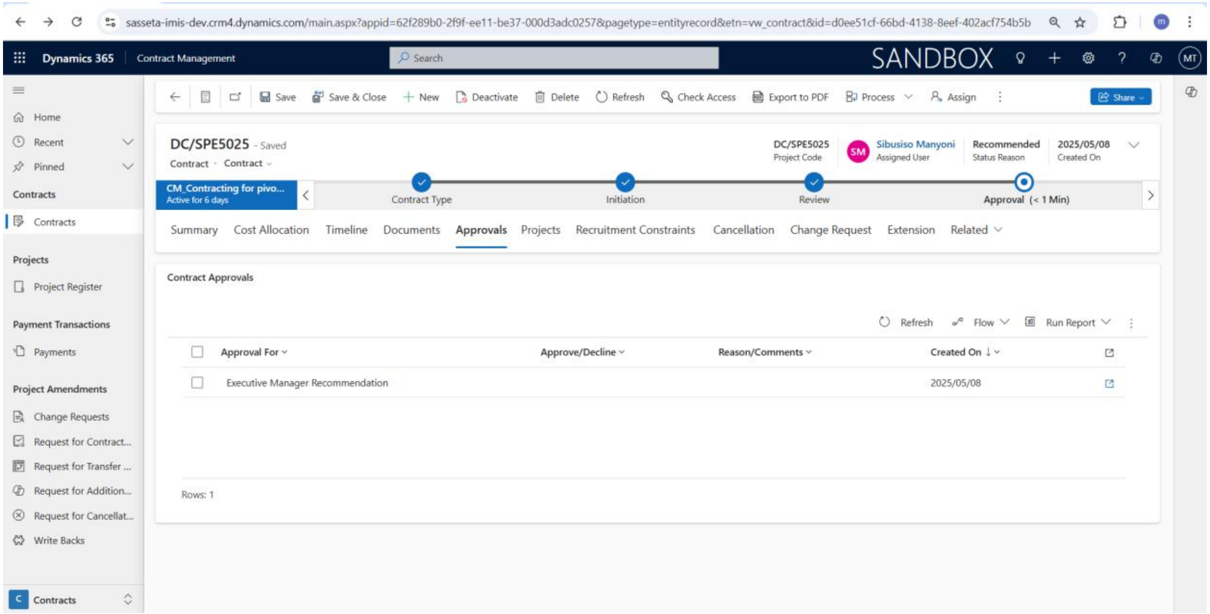


- **Step 5**: The step in 4 above will navigate you to Initiation stage.

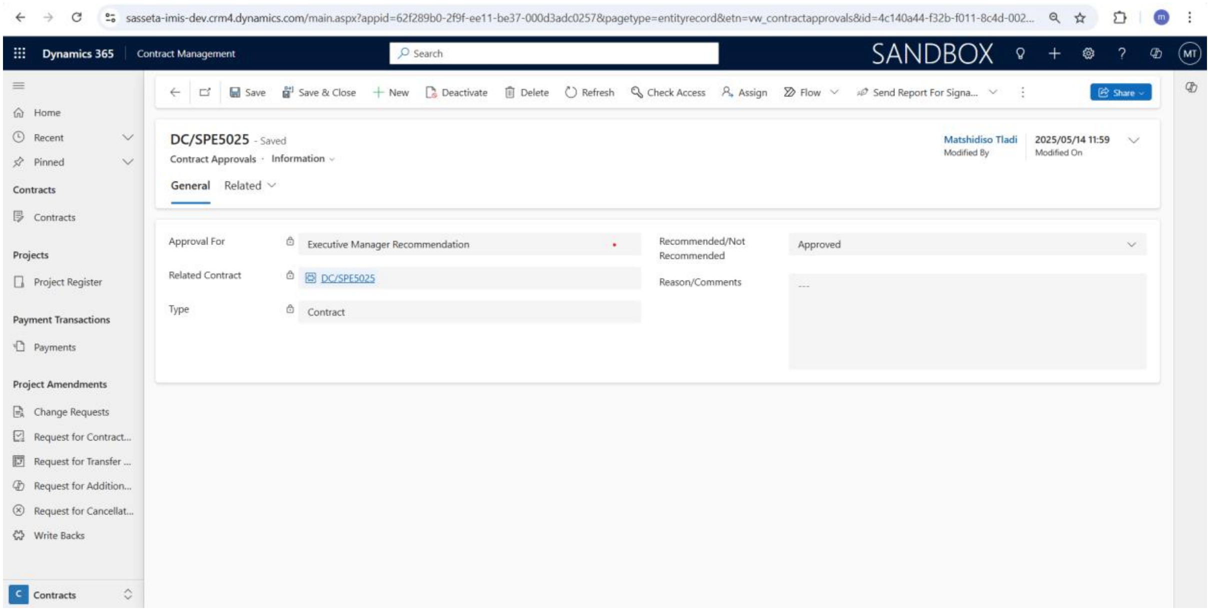
• **Step 5**: If this is a Stipend Contract, click Yes for Pay Stipends; if not, click No.
• **Step 6**: If you select Yes, additional stipend fields will be displayed. Populate the required fields.
• **Step 7**: For the next contract approval, select Draft Contract Completed and set Send Draft Contract for Review to Yes. This will forward the contract to the next personnel for approval.
• **Step 8:** The Manager or next personnel in line will receive an email prompting them to take action.
• **Step 9**: The Manager will open the assigned record at the Review stage of the business process flow.
• **Step 10**: If the Manager is satisfied with the contents of the contract, they should click Yes for Manager Review Completed to assign the contract to the next approver.
• **Step 11**: If No is selected, a rejection email will be sent to the practitioner. The practitioner can then make the necessary changes and resend the contract for review.



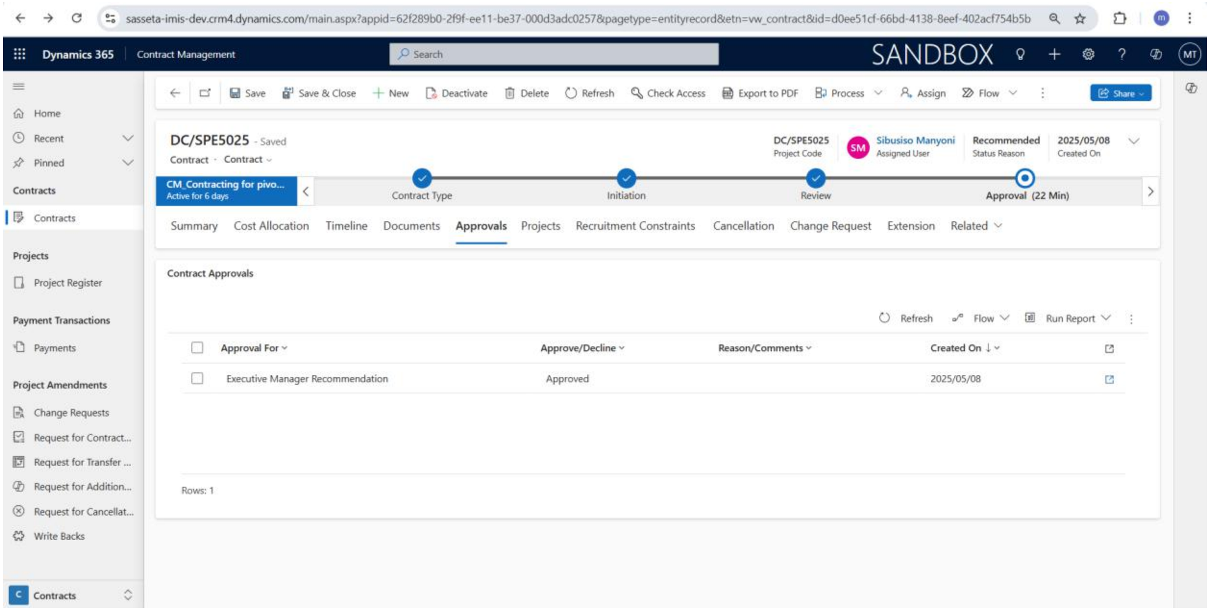
- **Step 11**: EM (Executive Manager) will receive an email to action the contract.
- **Step 12**: Navigate to Approvals Tab



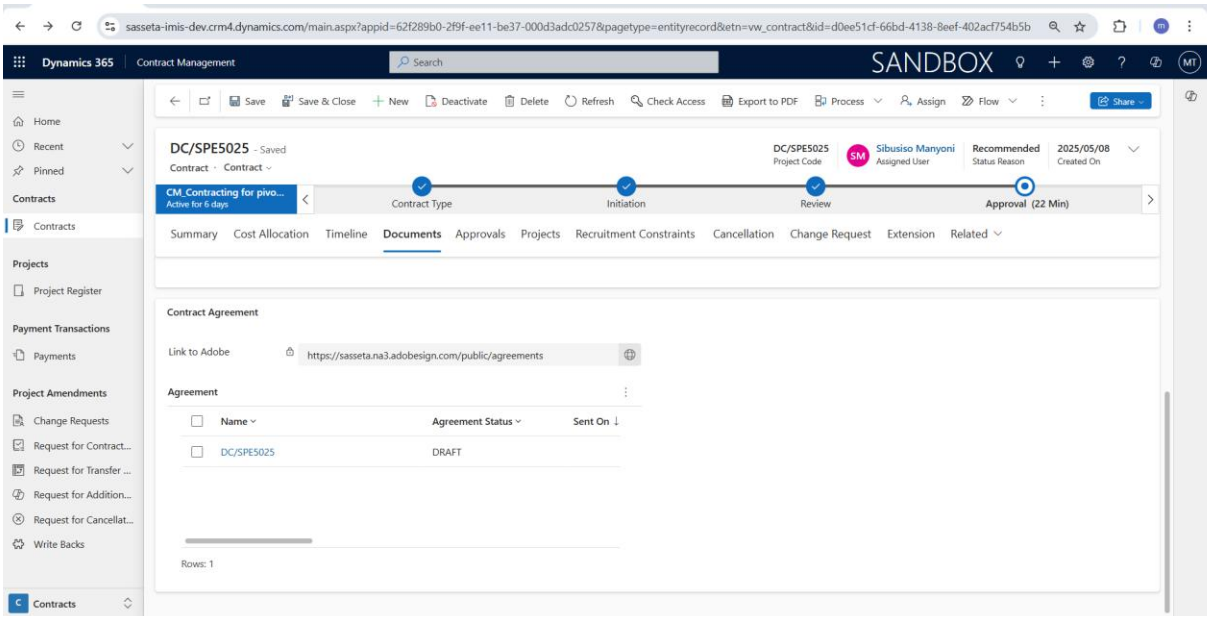
- **Step 13**: Open the EM Approval record by double clicking.
- **Step 14**: Select Recommended/Not Recommended
- **Step 15**: On Selection of *Recommended*, a notification is sent to practitioner to begin the signing process.
- **Step 16**: On Selection of *Not Recommend* the record notifies the practitioner.
- **Step 17**: The above step will set the value of *EM: LP Recommend* field to yes or no.
- **Step 18**: Click on Save and Close



- **Step 18**: This will navigate you back to the Approvals Tab

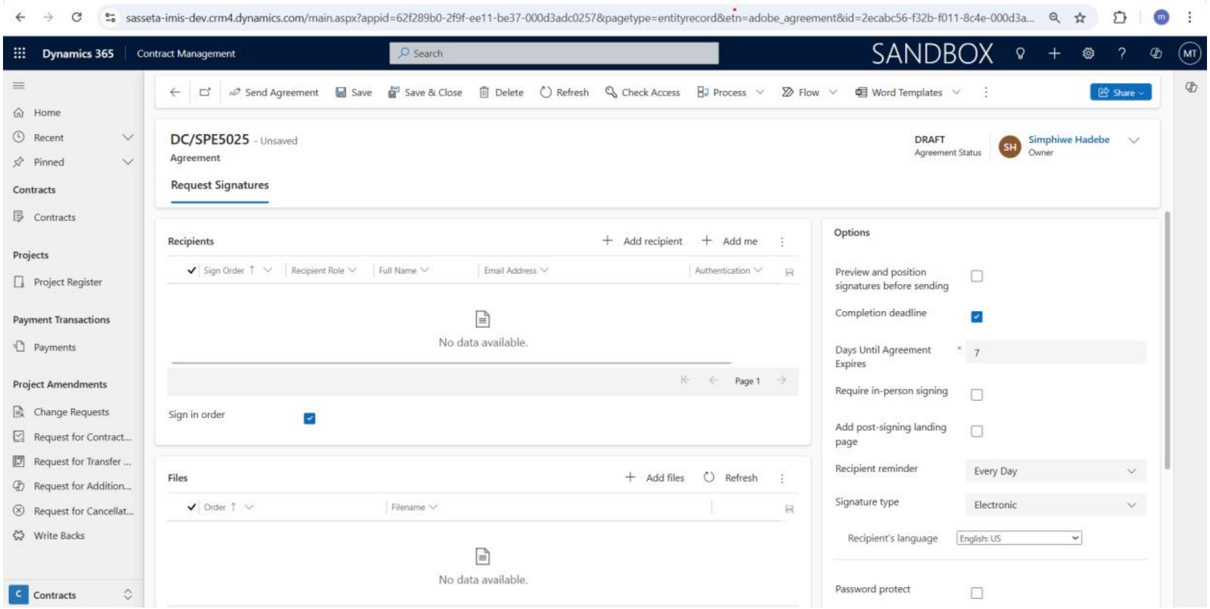


- **Step 19**: Under Contract Agreement section, adobe link and agreement record will be created.
- **NB**: To setup Adobe signing process all parties required to sign the document should be known before hand, make sure you have emails and names of all parties including witnesses.

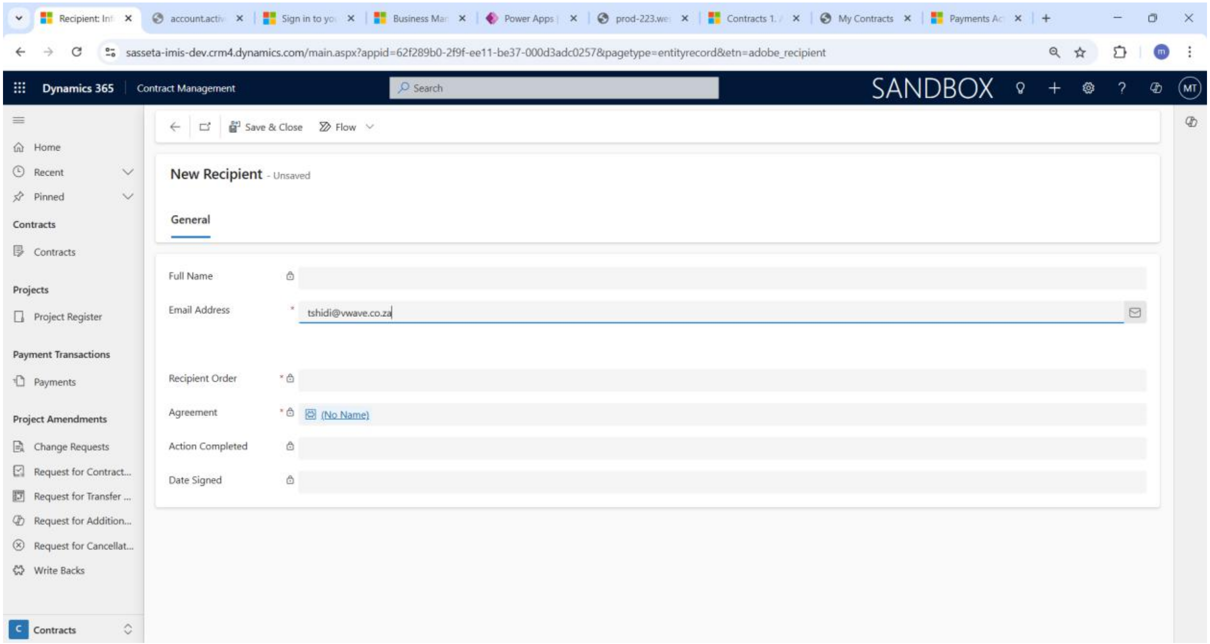


- **Step 20**: Click on the agreement record **DC/SPE5025** to setup initial agreement parameters.
- **Step 21**: Select *Preview and Position Signatures Before Sending*
- **Step 22**: Sign Order should be selected; this ensures the document is send according to the specified signing order.

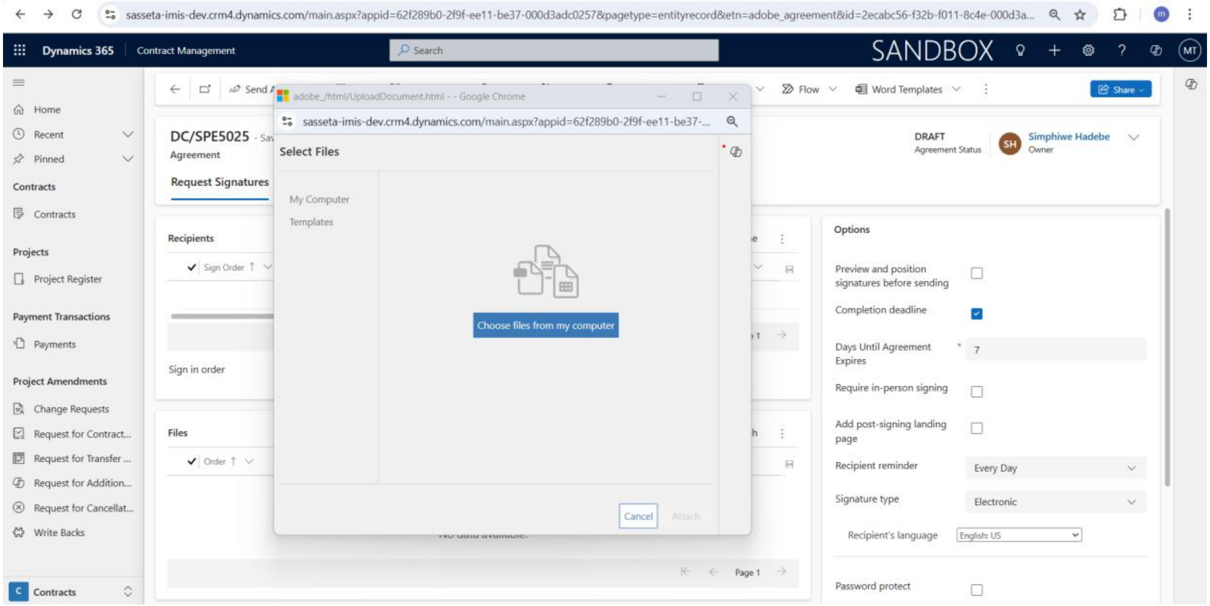
- **Step 23**: Under Recipients section, click on *+ Add recipients'* button, add at least one email address, the first signatory, or all parties, note that if a signatory is not added here, you can add it on adobe UI later.
- **Step 24:** On the Files section click on *+ Add Files* button, attach the approved contract template.



- **Step 26:** Add New Recipient Page, add email address and click on save and close.

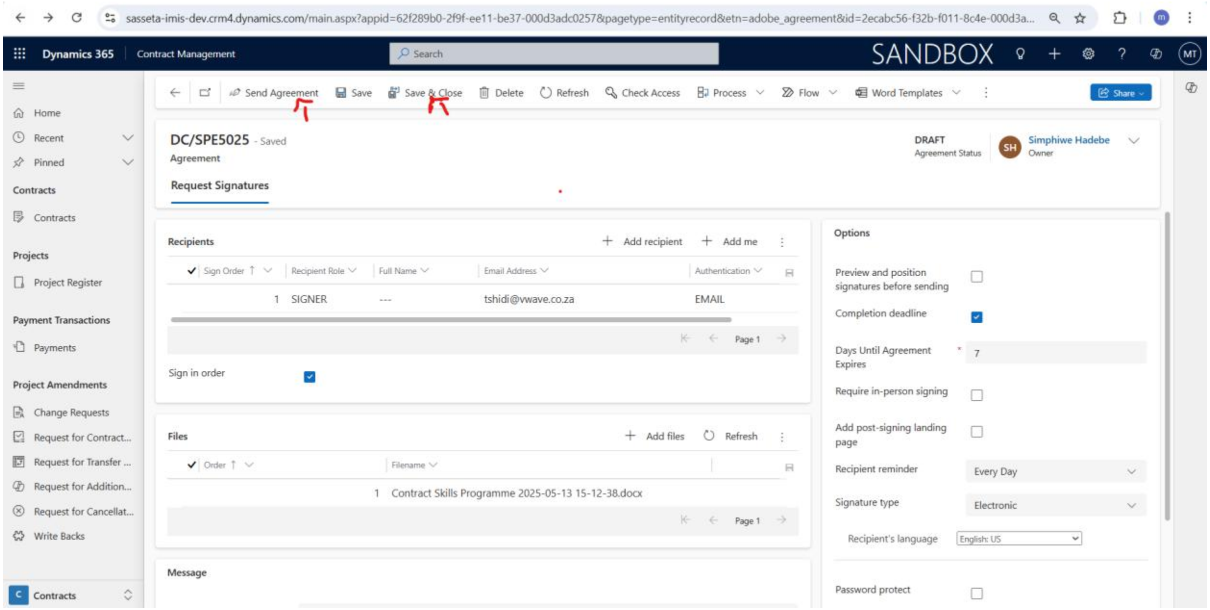


Step 27: Add Files Page, click on choose files from Computer



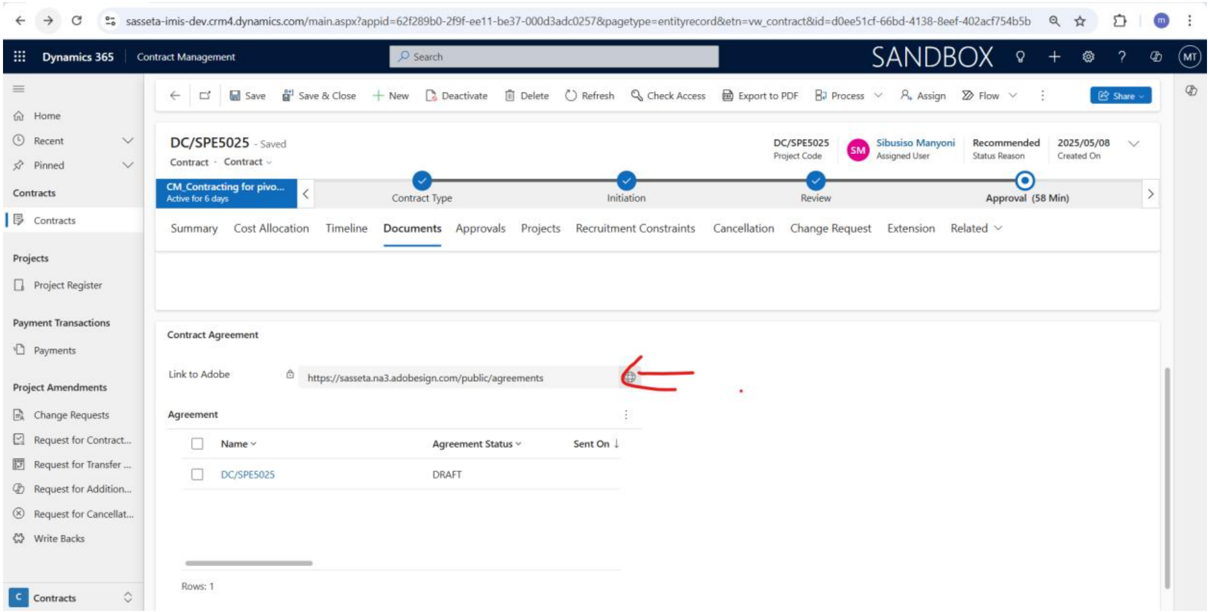
Step 28: On the agreement record ribbon, click on **Send Agreement** button, the status of the agreement record changes from *Draft* to *Awaiting Authoring*

Step 29: Click on **Save and Close** button on the agreement record ribbon

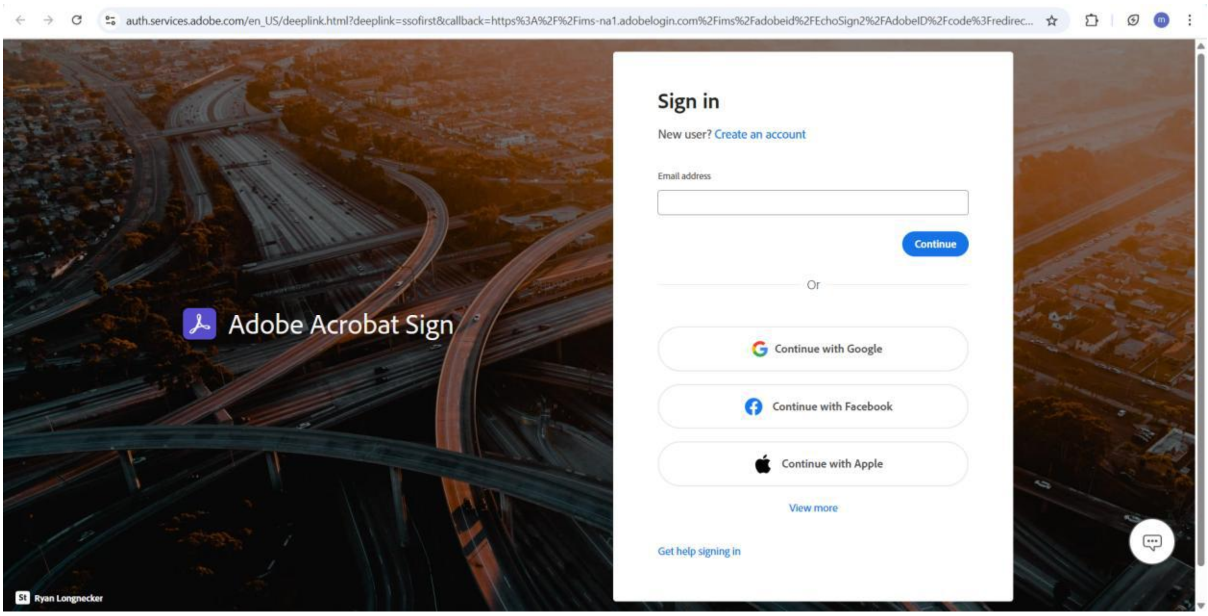


Step 30: The above step navigates you to documents section

Step 31: Click on Link to Adobe to continue the signing process

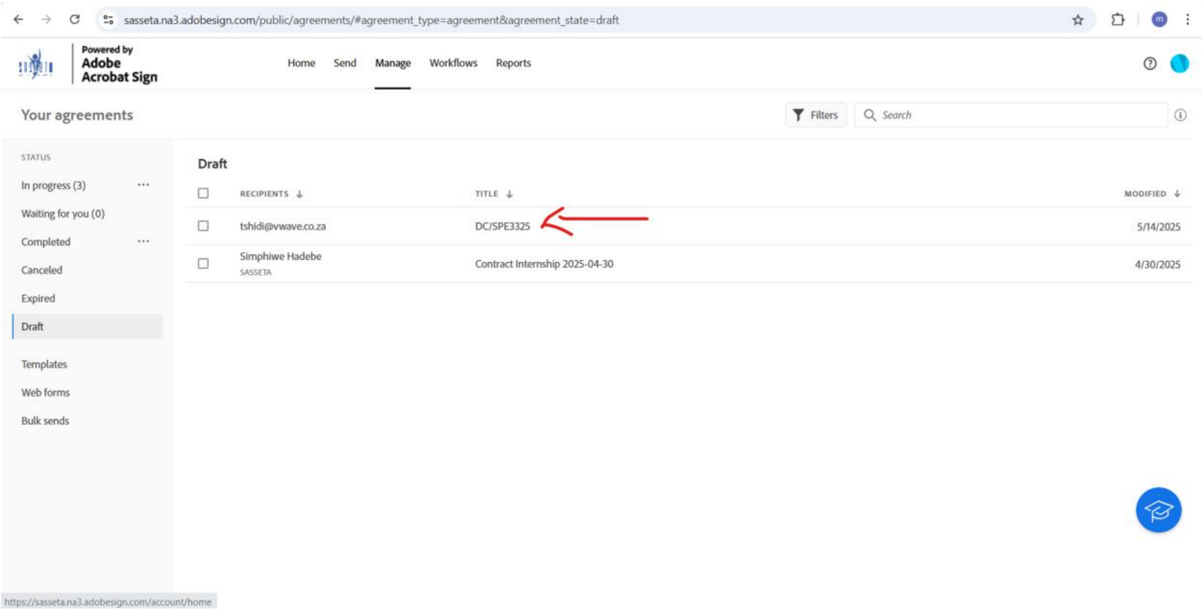


Step 32: Clicking on the link will open adobe app page, to access adobe app, you need to have a valid adobe licence

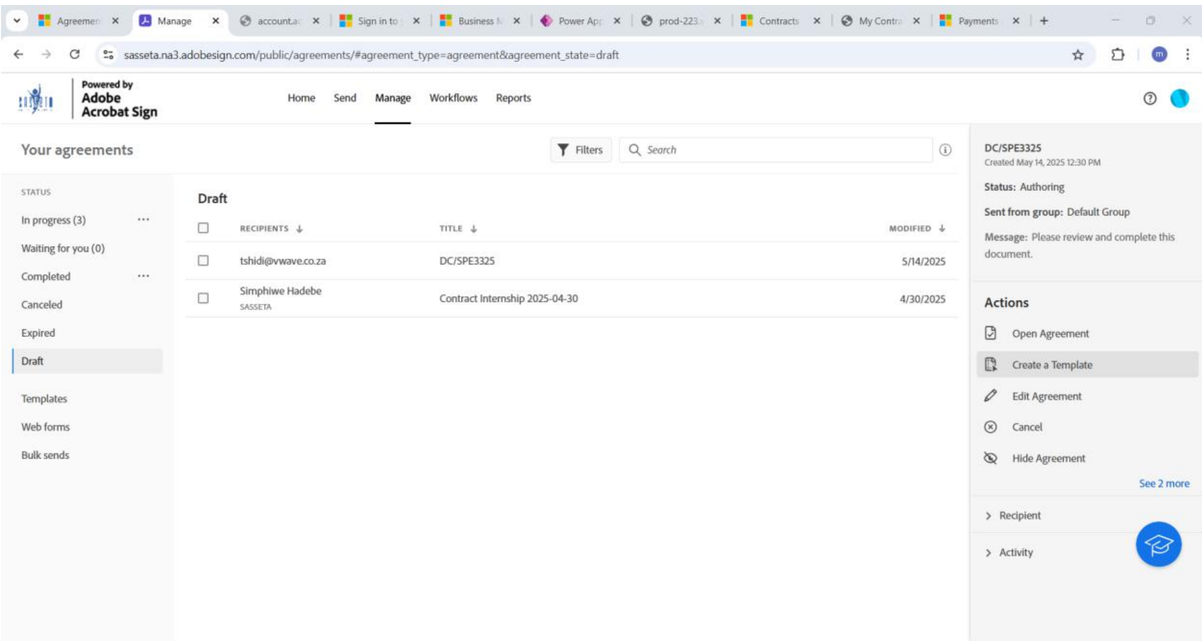


Step 33: On Login this is the page you will see

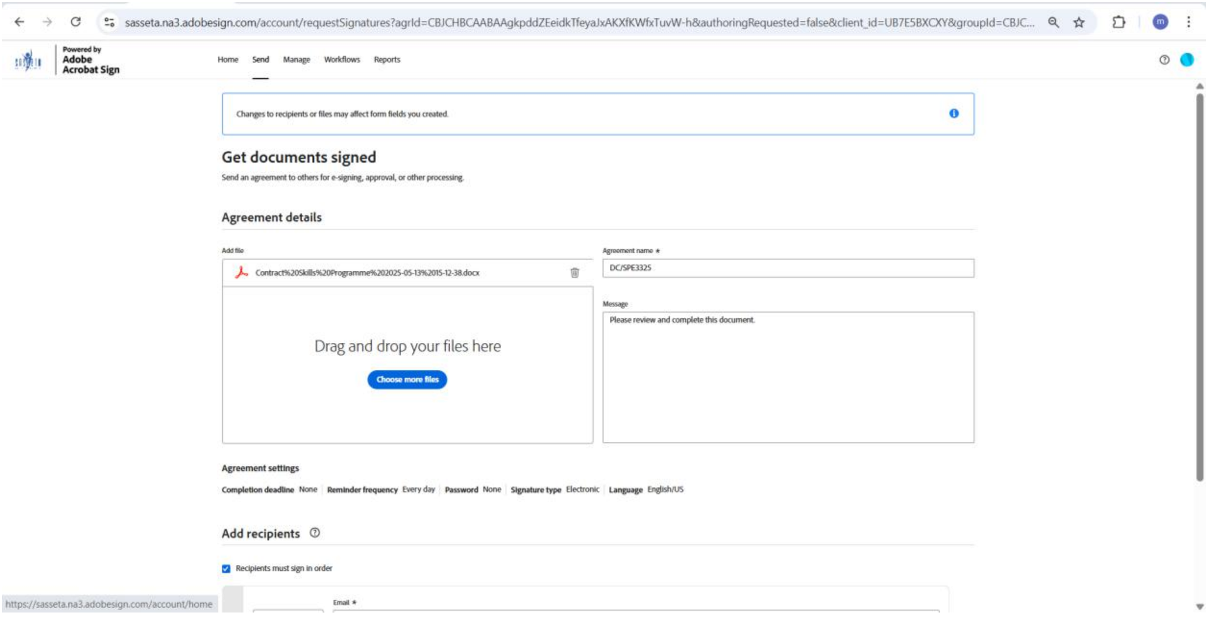
Step 34: The contract will be under on the Navigation drafts



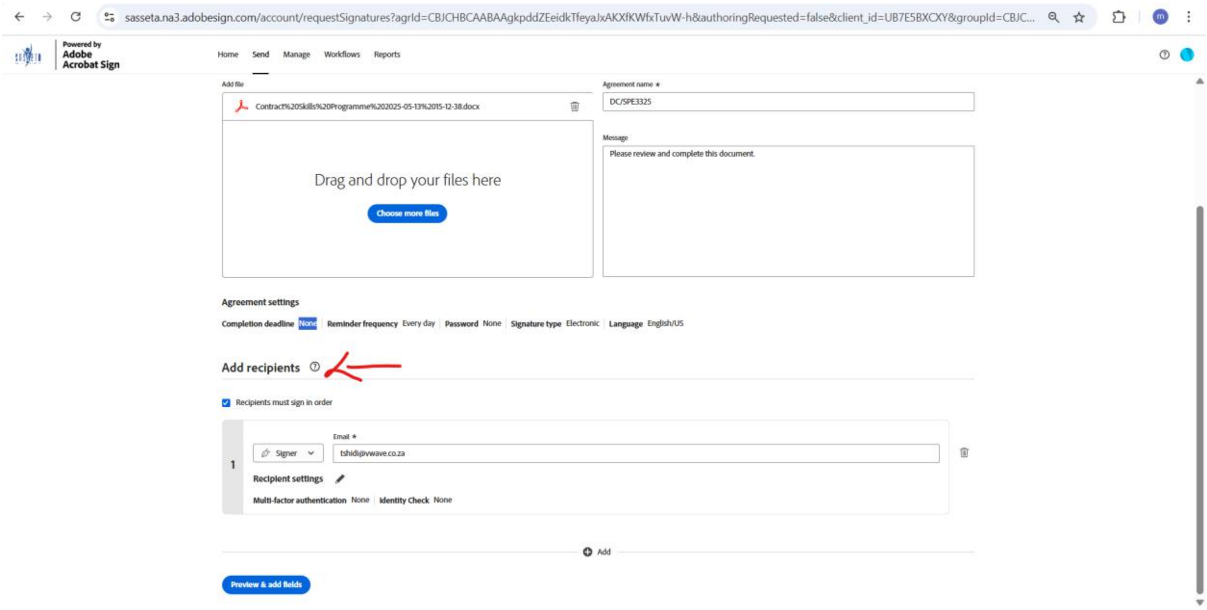
Step 35: Select the contract, click on *Edit Agreement*



Step 36: This below page will be presented to you, with previously attached contract



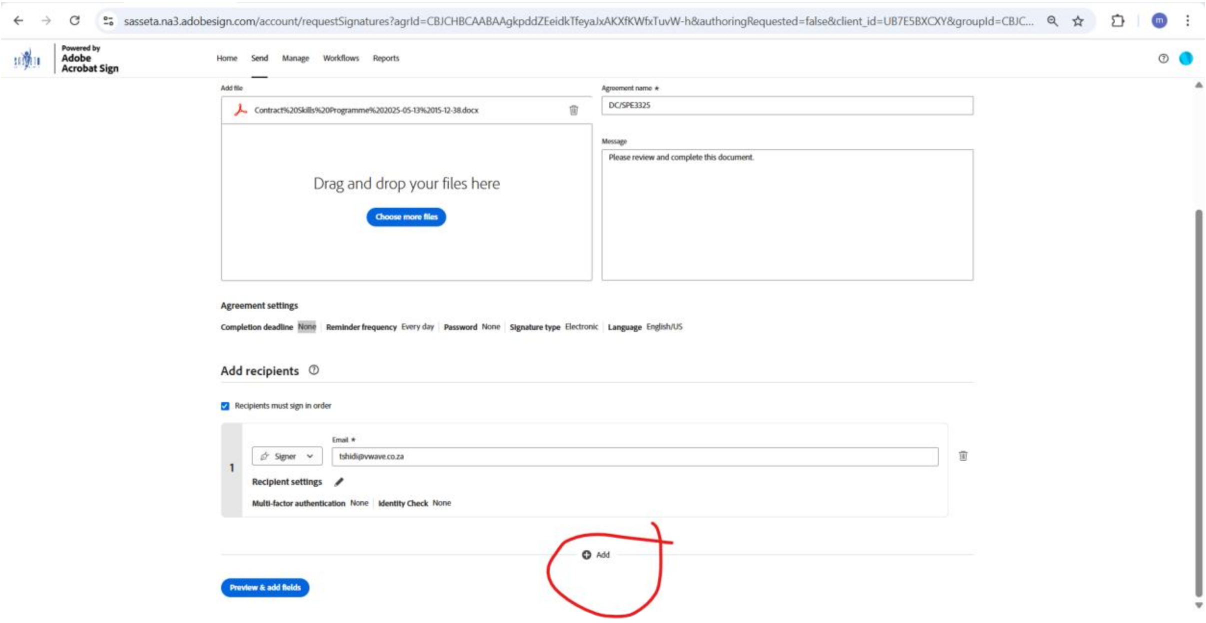
Step 37: Scroll down to the Add recipients' sections



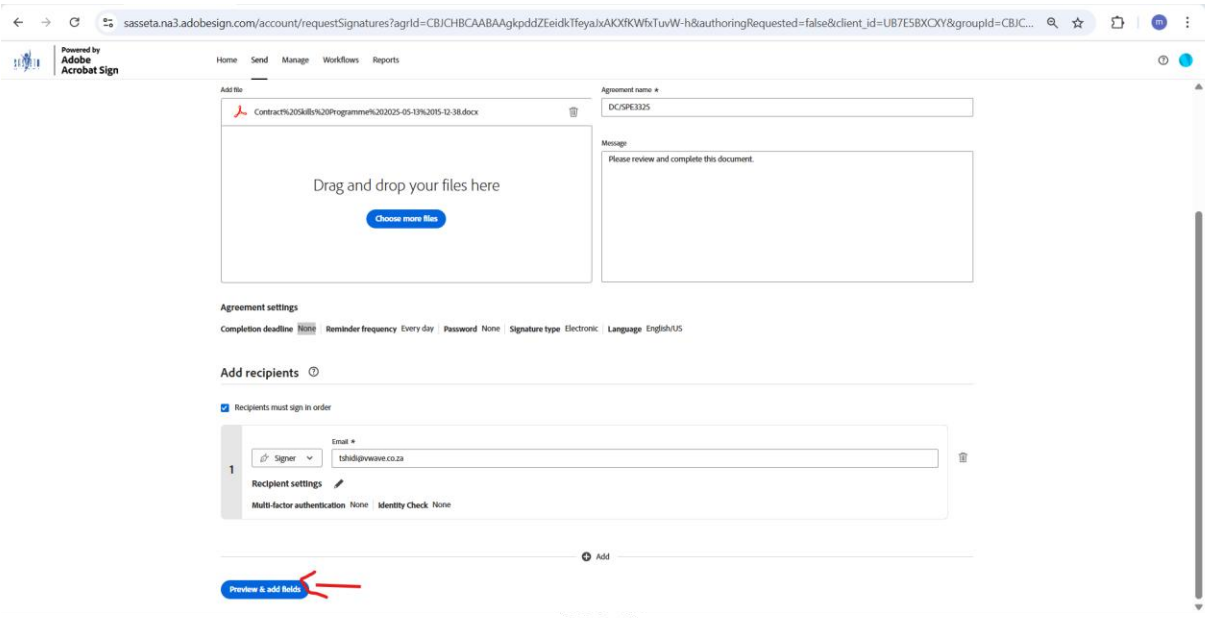
Step 38: Change the recipient's designators available options are

Signer, Approver, Sign acceptor, Certified Recipient, Sign with Witness or Delegator

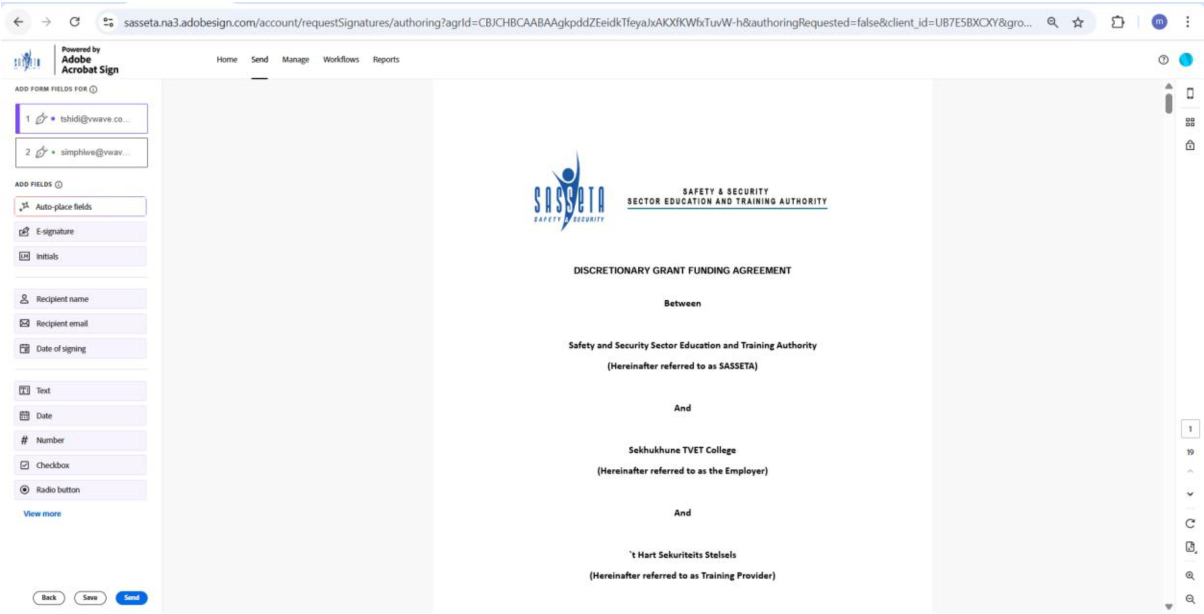
Step 39: Click on Add to for additional signatories, populate their email address, select *add individual,* specify the action in Step 38 above



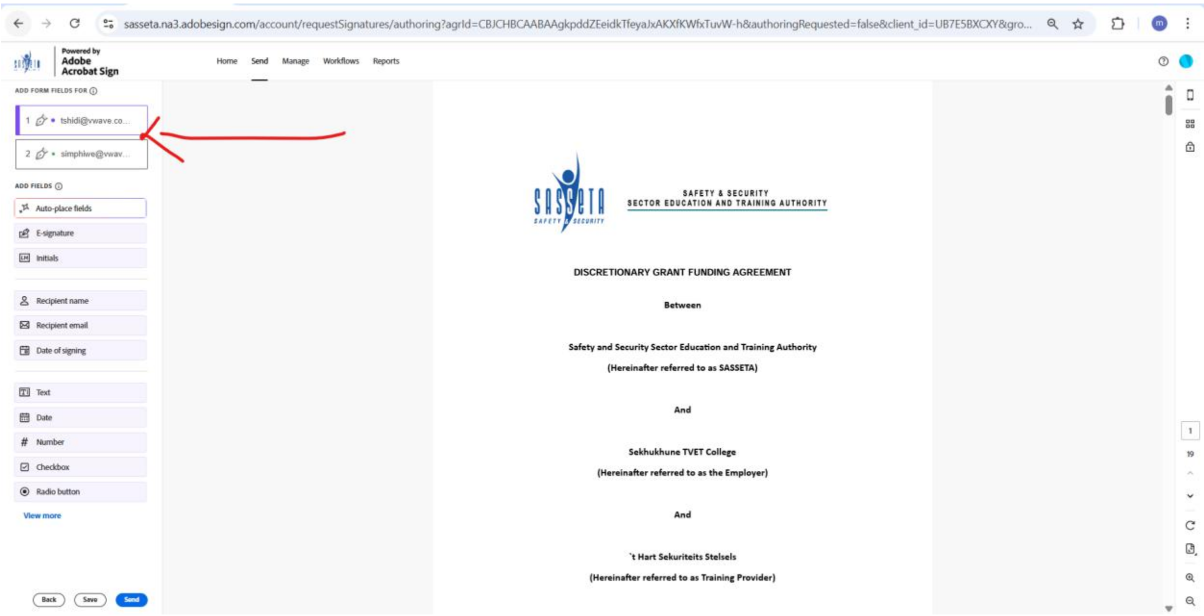
Step 40: Click on **Preview & add fields**



Step 41: You will lend on the below page for setting up designated places for all the rec recipients list



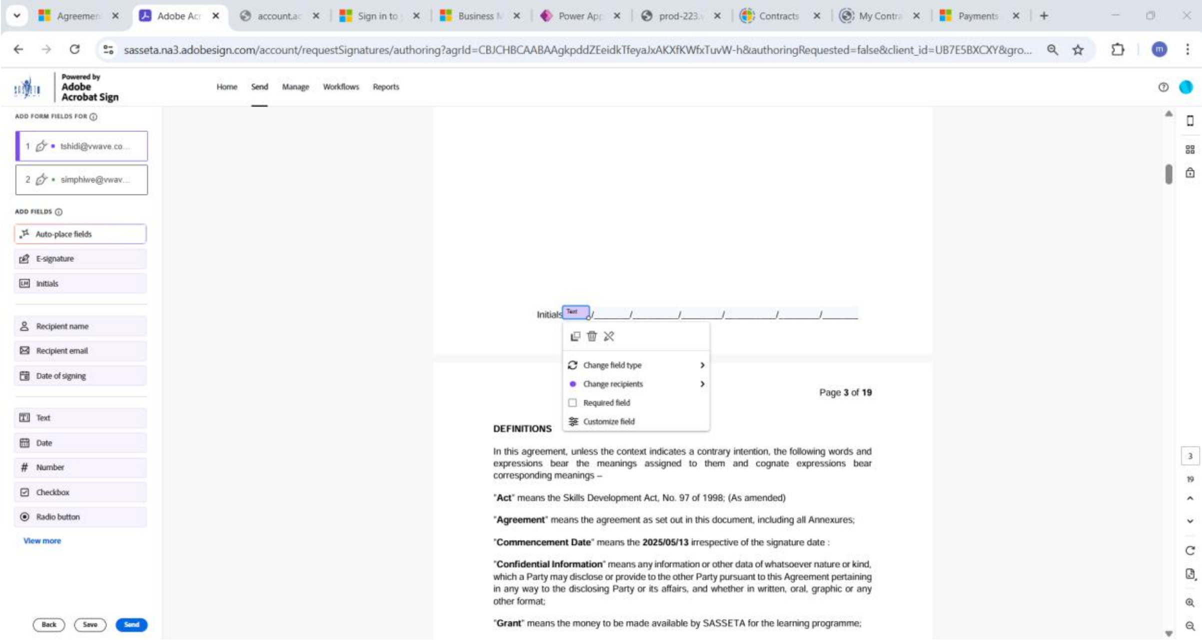
Step 42: On the left Navigation Under **ADD FORM FIELDS FOR** section is a list of all recipients colour coded

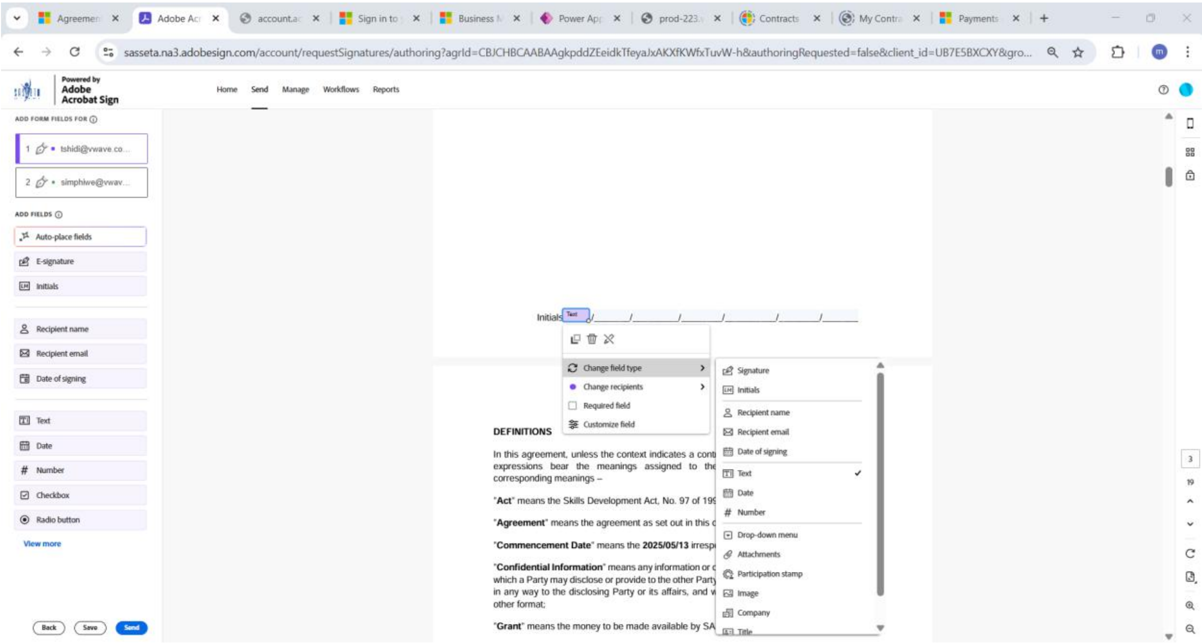


Step 43: Click on the first page that needs initials or signature, the colour represents the recipient

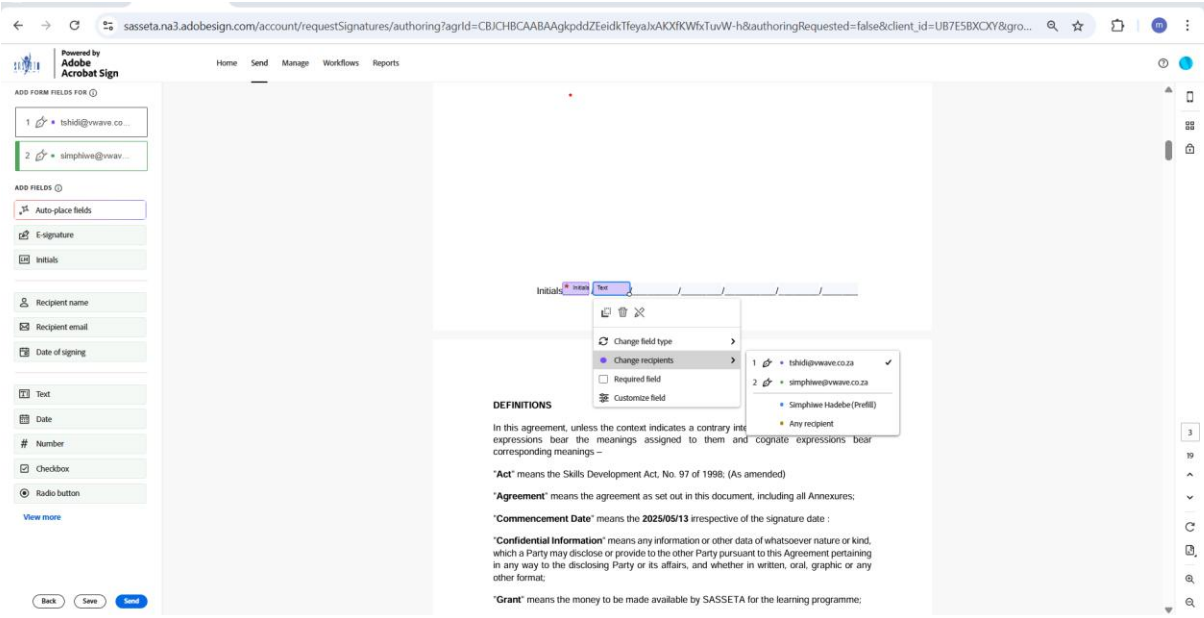
Step 44: Click on the change field type to change the type of field preferred type, see field type options on below screenshot

Step 45: Repeat this for all pages where you want the colour coded recipient to sing until the last page

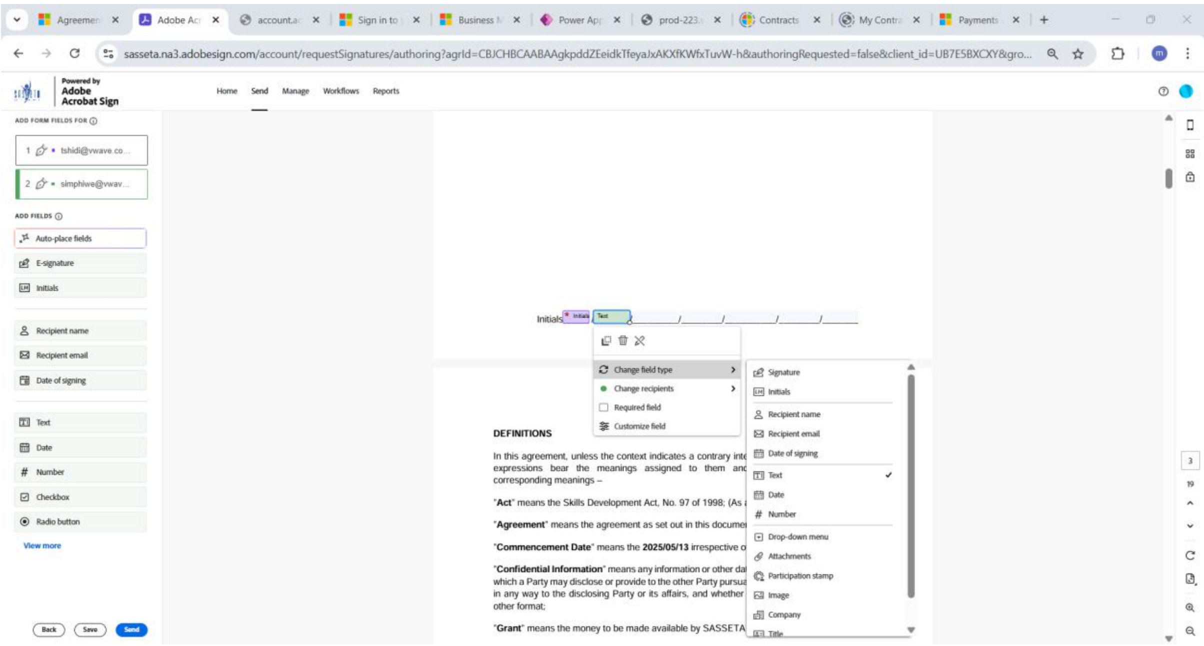




Step 46: Select the next recipient and repeat the process for all pages for each recipient

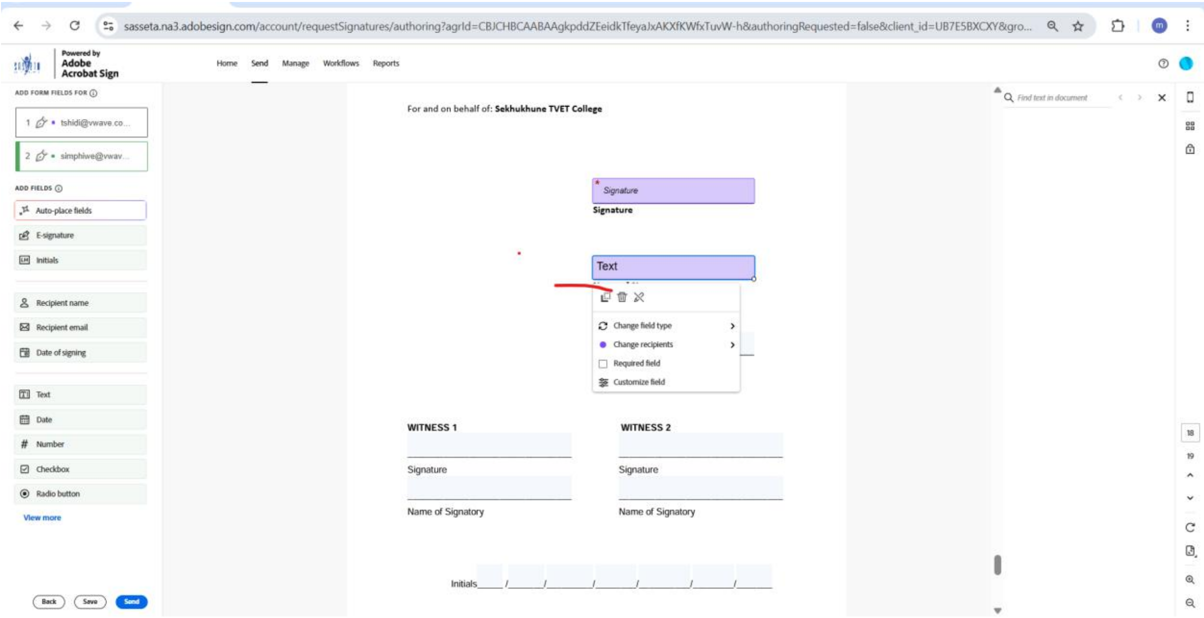


Step 47: Add the field type and ensures the selected recipient is correct, this ensures recipient validity, to sign and initials in designated places

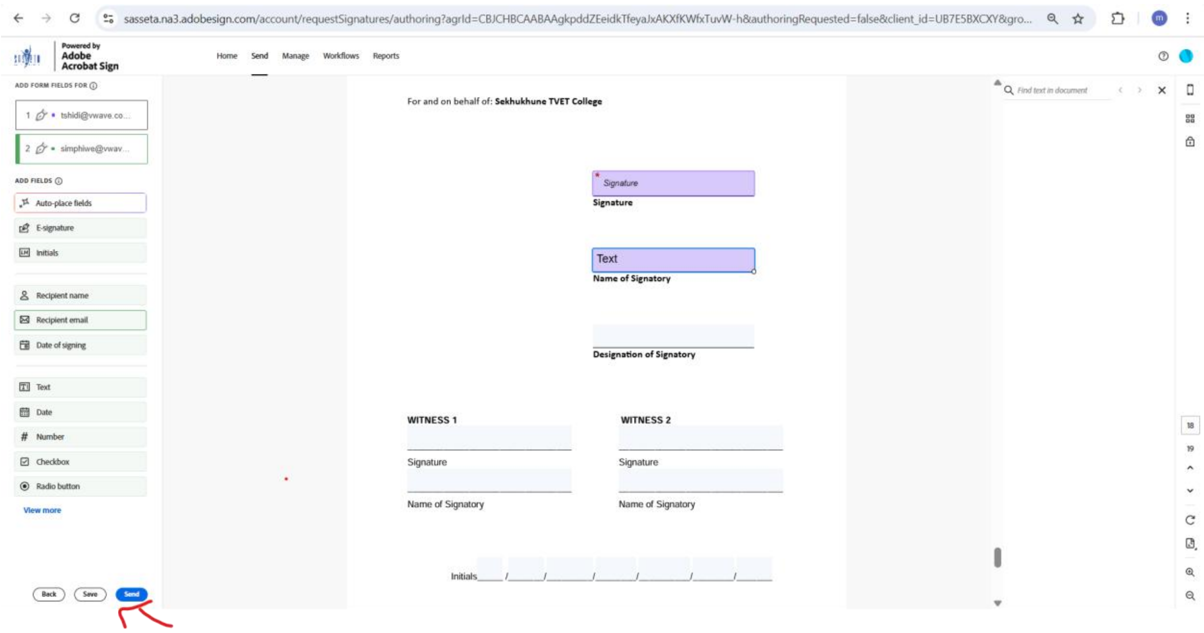


Step 48: Repeat this process for all receipts on the list

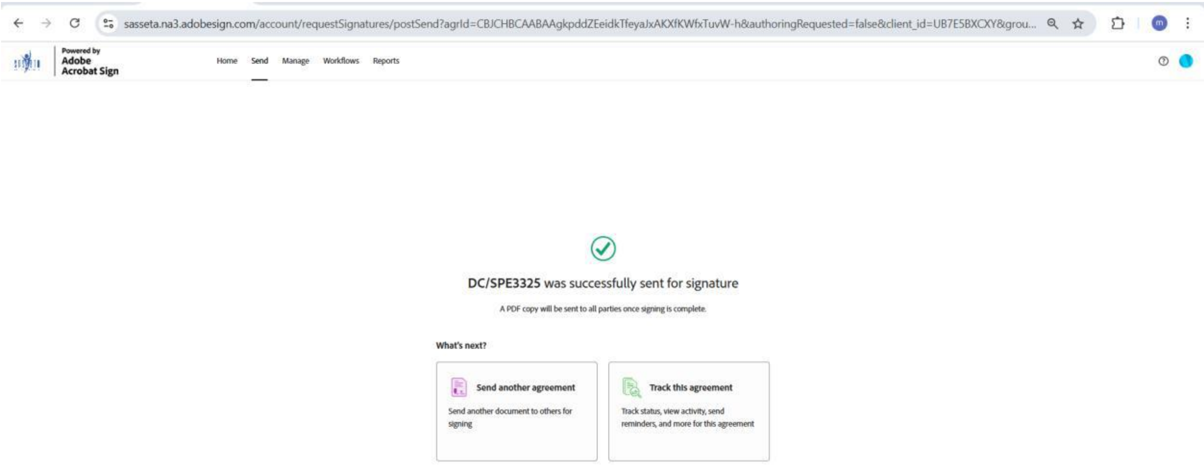
Step 49: To delete you can click on the bin sign and reconfigure or add again on the field or the next field, this deletes the current user you have selected and the field type, you can add another one or move to the next field



Step 50: Once completed click on **Send**, this kicks off the signing process through sending notifications to receipts

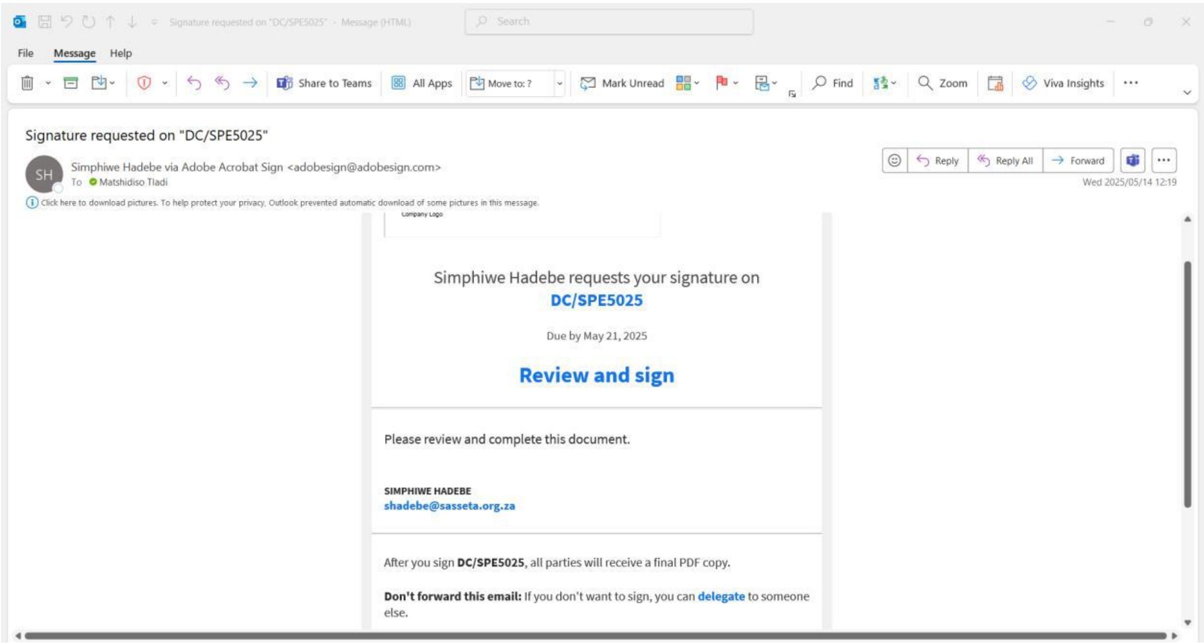


Step 51: On Completion you, the below screen will be displayed, you can close adobe page

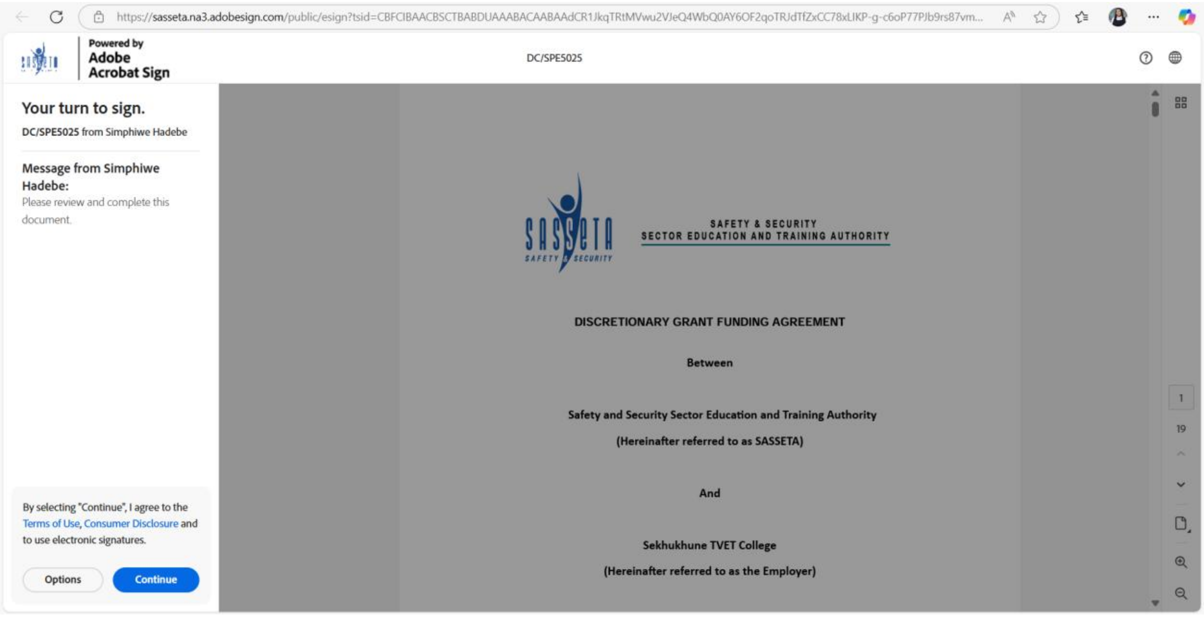


Step 52: When you Navigate to the contracts page, documents section, the agreement will change from WAITING **FOR AUTHORING** to **OUT FOR SIGNATURE**

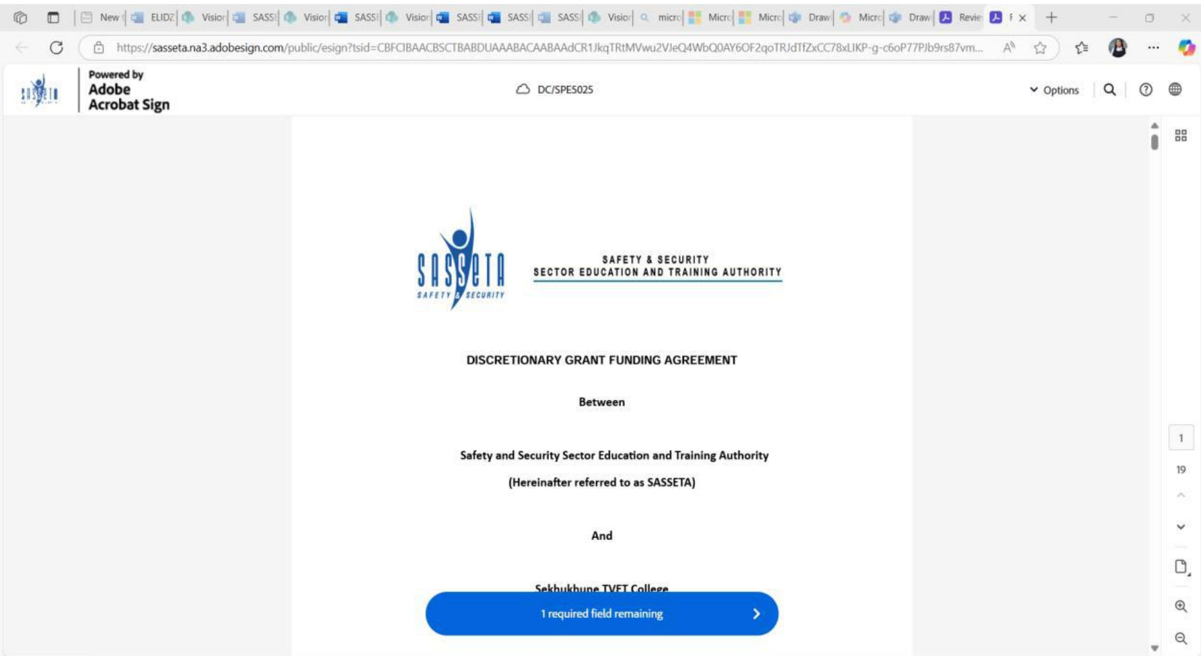
Step 53: The recipients as per specified order will receive the notification email to sign



Step 54: By Clicking on review and sign in the previous email, the following page will be opened, click on Continue

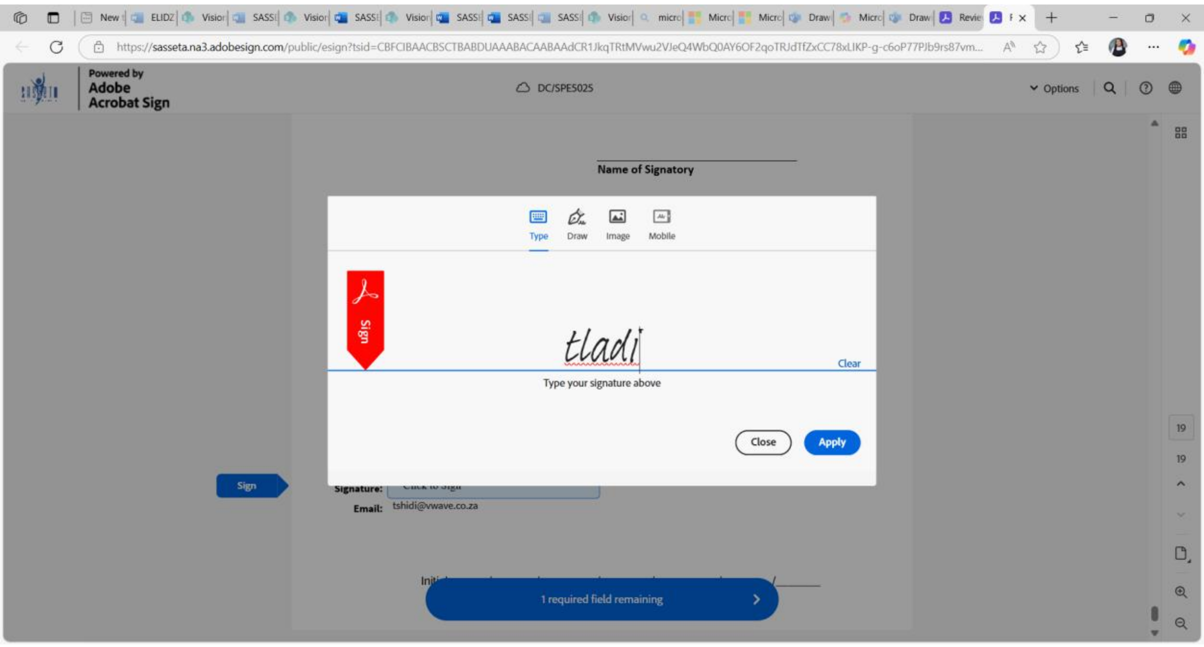


Step 55: Click on blue button at the bottom, it will guide you on need all sections to populate



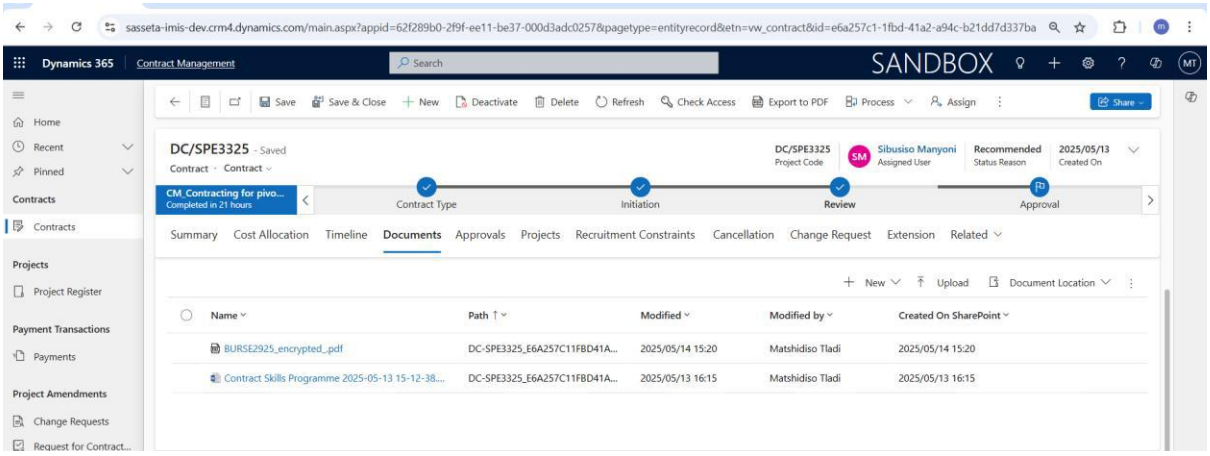
Step 55: Click on apply for changes to take effect on each field, once completed, click on submit and Sasseta page will be presented.

NB: After signature you can open but cannot edit this document



Step 56: All recipients and the practitioner will be sent an email with attached signed contract and the Adobe Sign Audit Report/Signed Certificate of Completion

Step 57: The practitioner should download this signed contract document and upload it in on the documents section

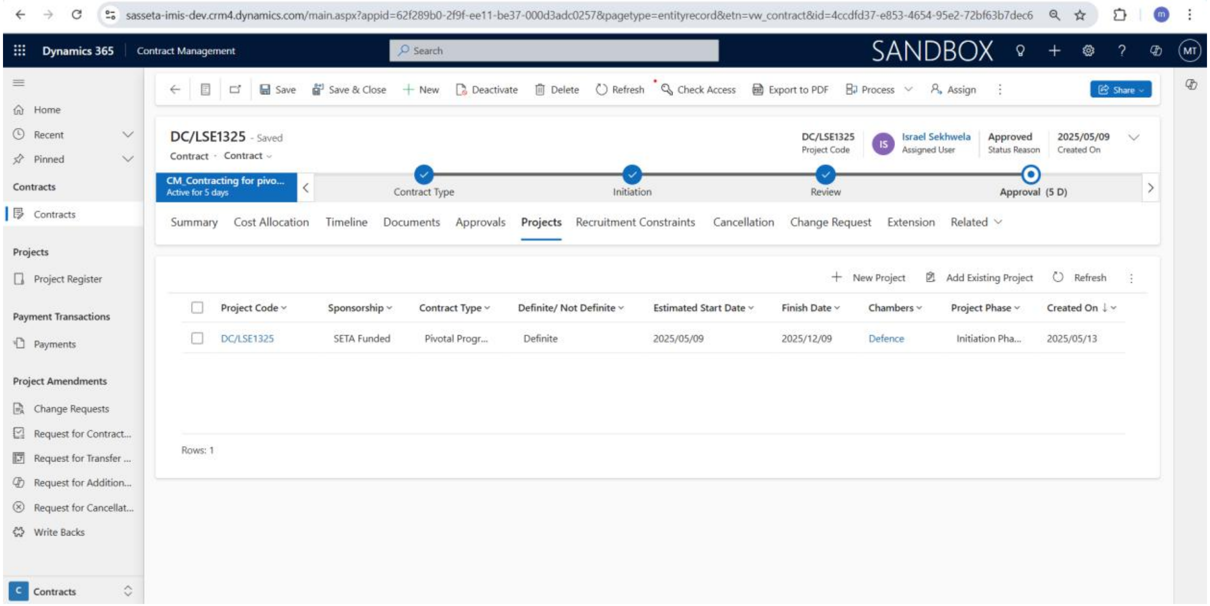


Step 58: The practitioner clicks on the approval stage in the business process, click on yes for fields - Approved by CEO, Contract sent to Stakeholder, Provider Accepted the Contract

Step 59: This will Create the project under projects

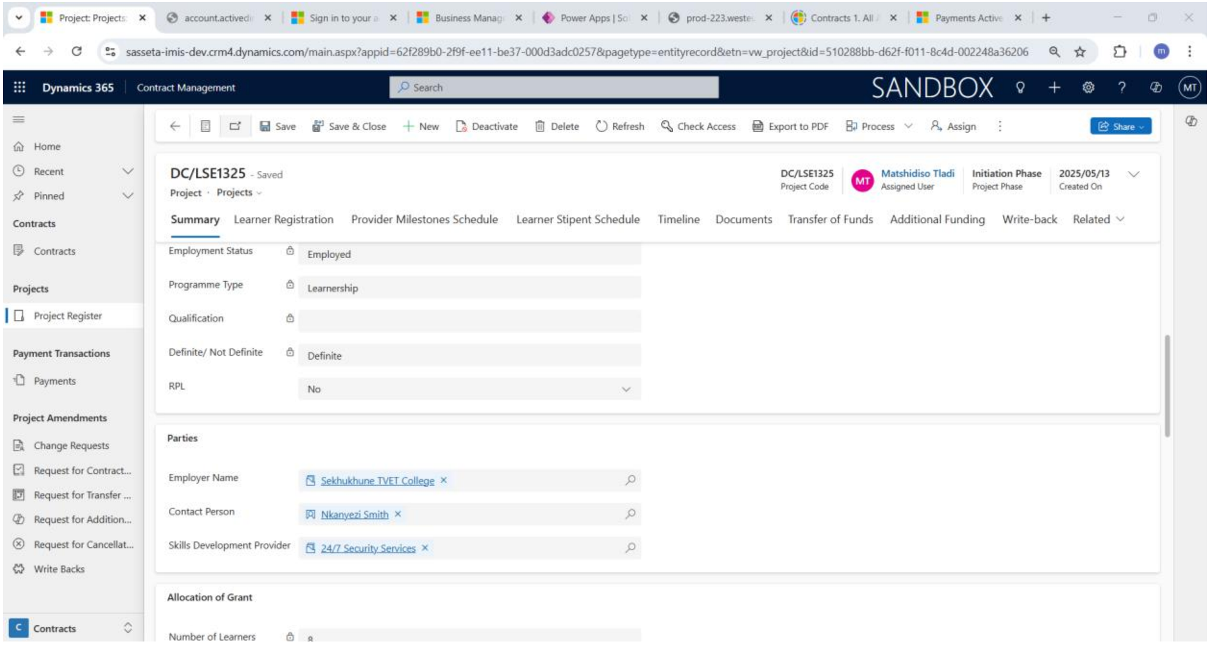
5.1 PROJECT MANAGEMENT

5.1.1 A PROJECT WILL BE CREATED UNDER PROJECTS .



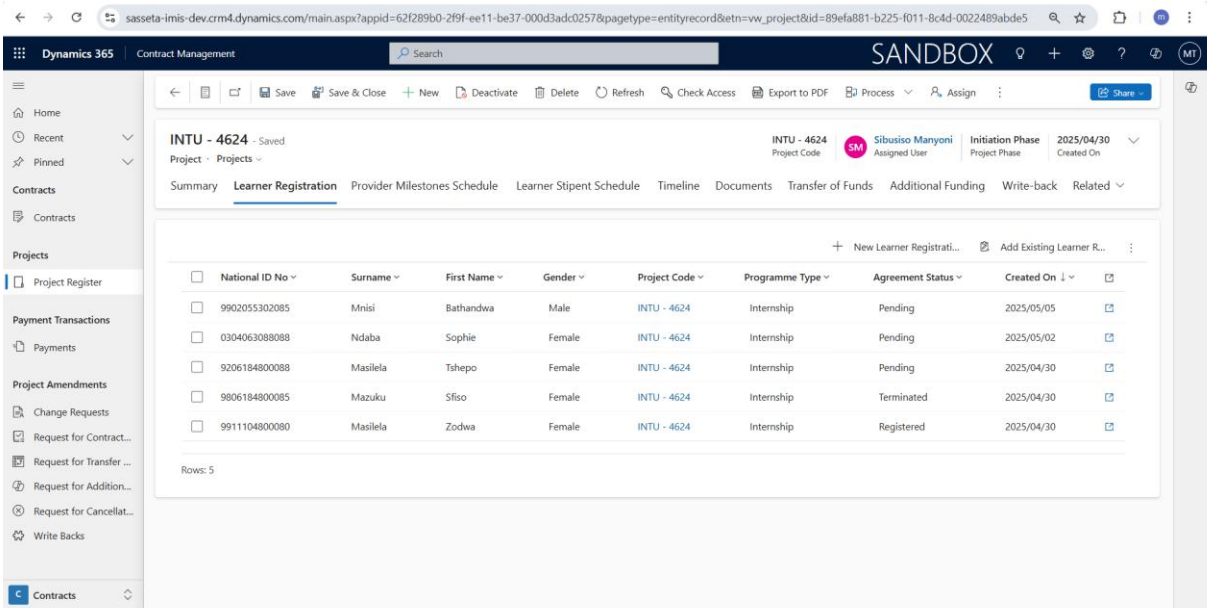
- To open the project double, click the project or open the project under project, project register, select and double click the project.

5.1.2 PROJECT LANDING PAGE



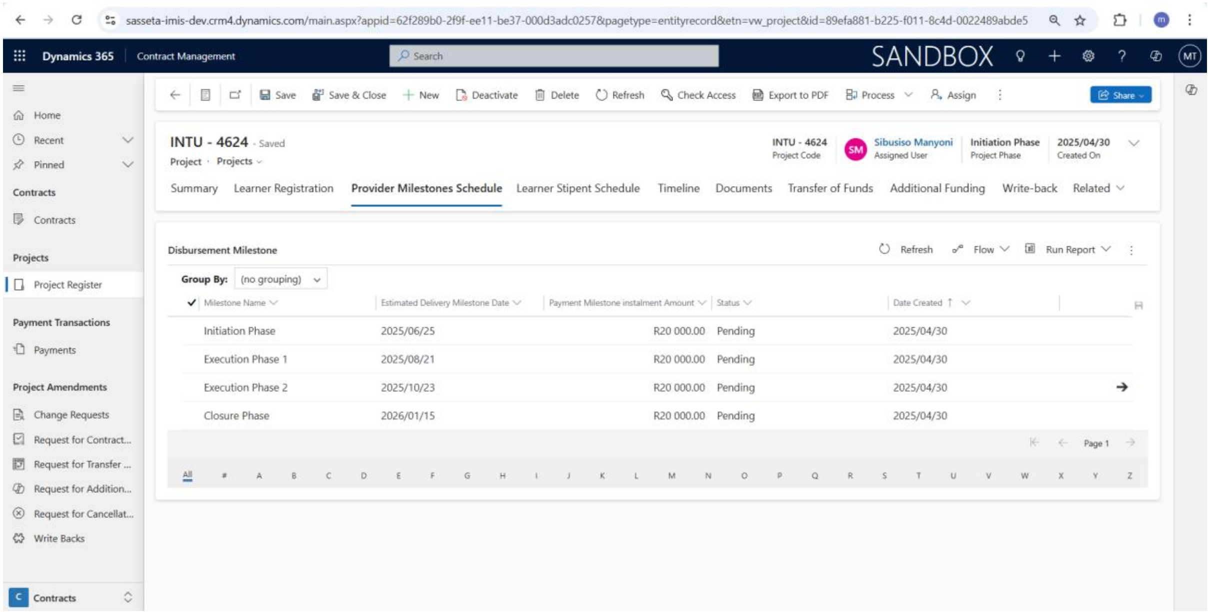
5.1.3 LEARNER REGISTRATION

1. Navigate to Learner Registration Tab to view Learners has been added to the project, verified learners have the agreement status of registered.

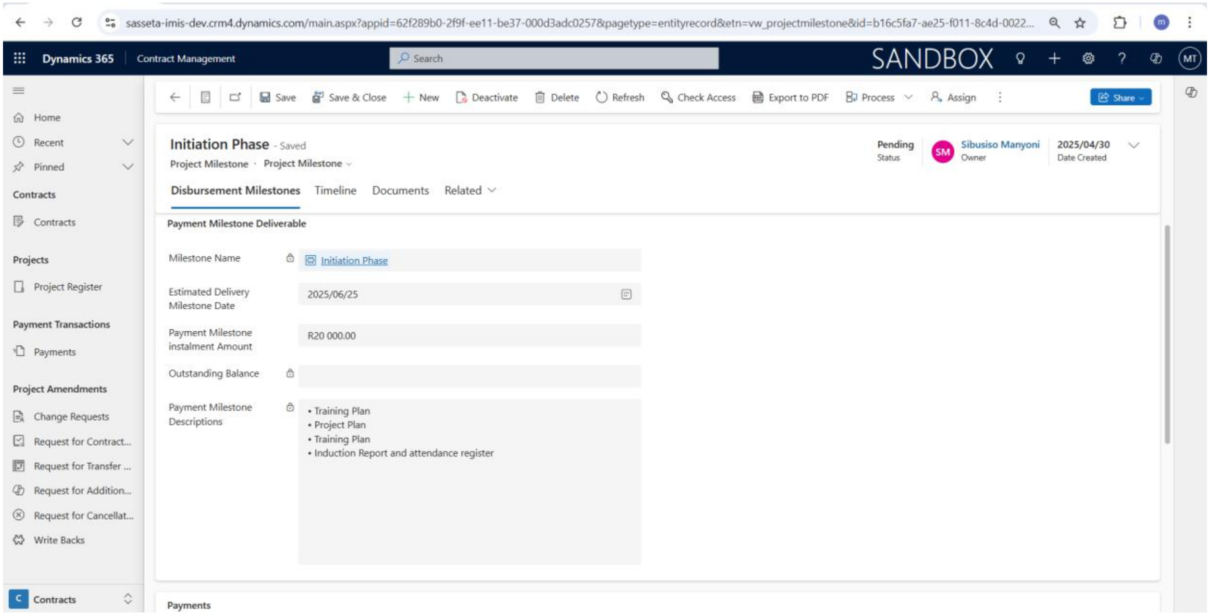


5.1.4 PROVIDER MILESTONE SCHEDULE

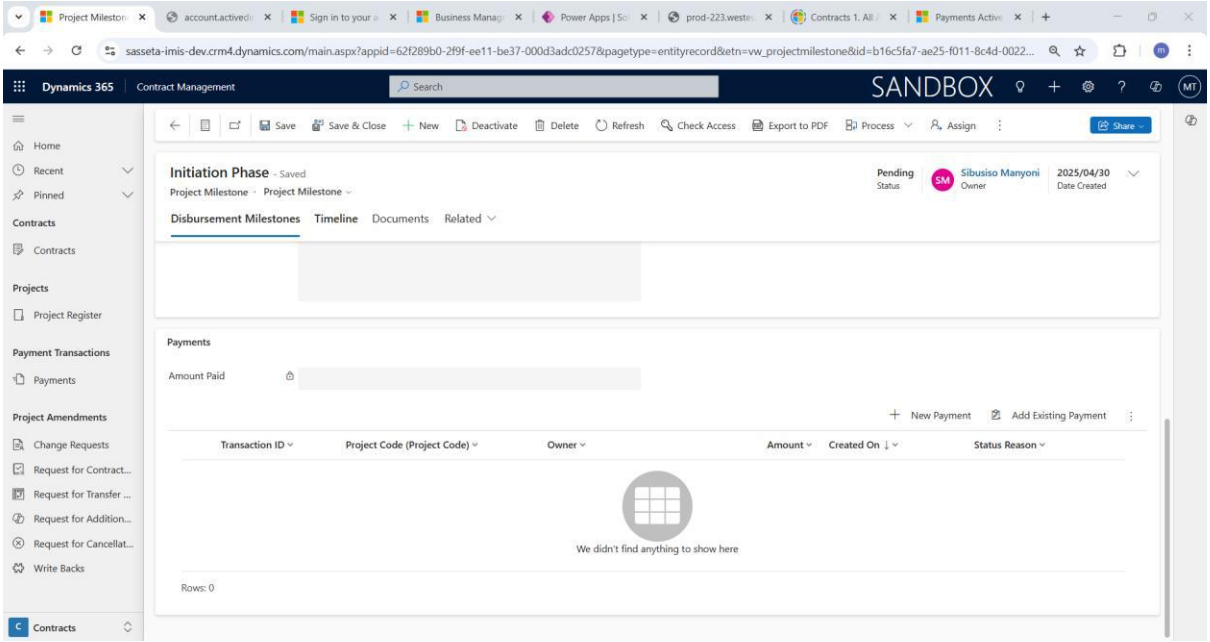
1. Navigate to Provider Milestone Schedule for milestone payments.



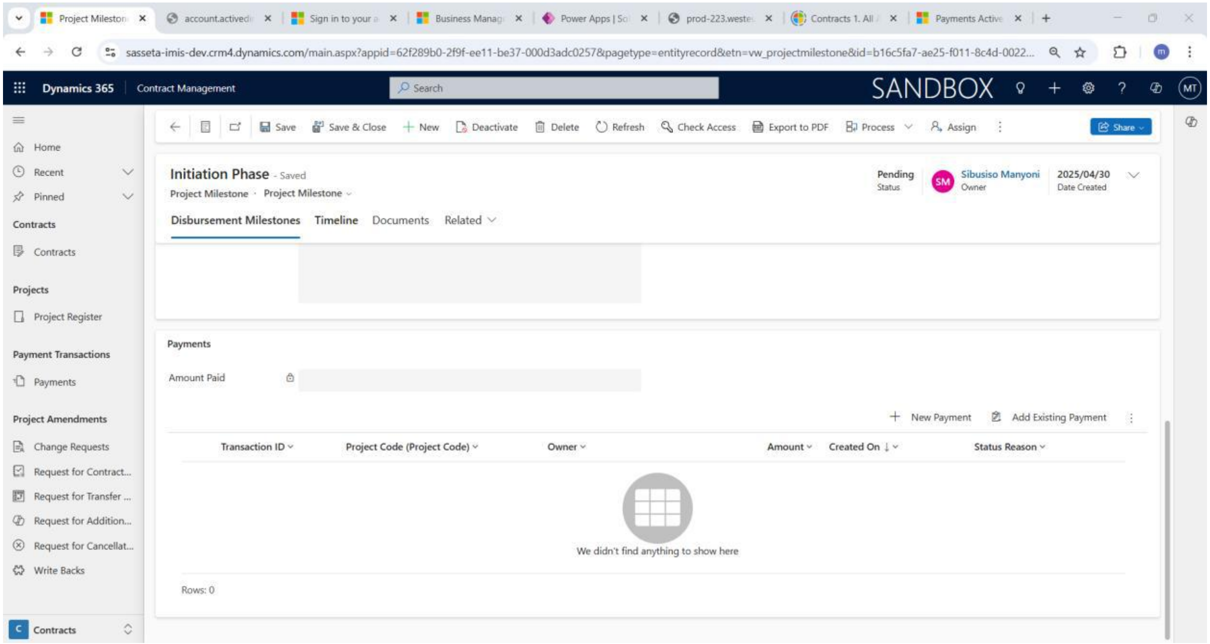
2. Click on the milestone and click on edit
3. Open project milestone , modify the necessary fields and add the installment amount

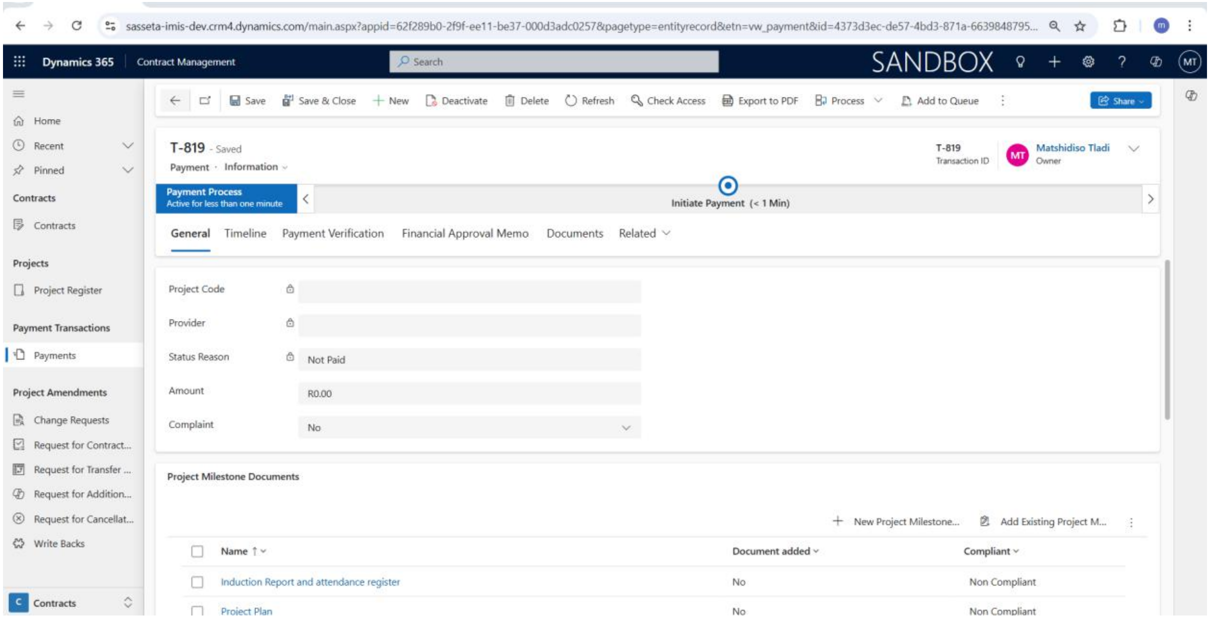


4. To add a payment request fror the provider , click on New Payment



5. Click On new Payment , click on save , automatic creation of project milestone documents

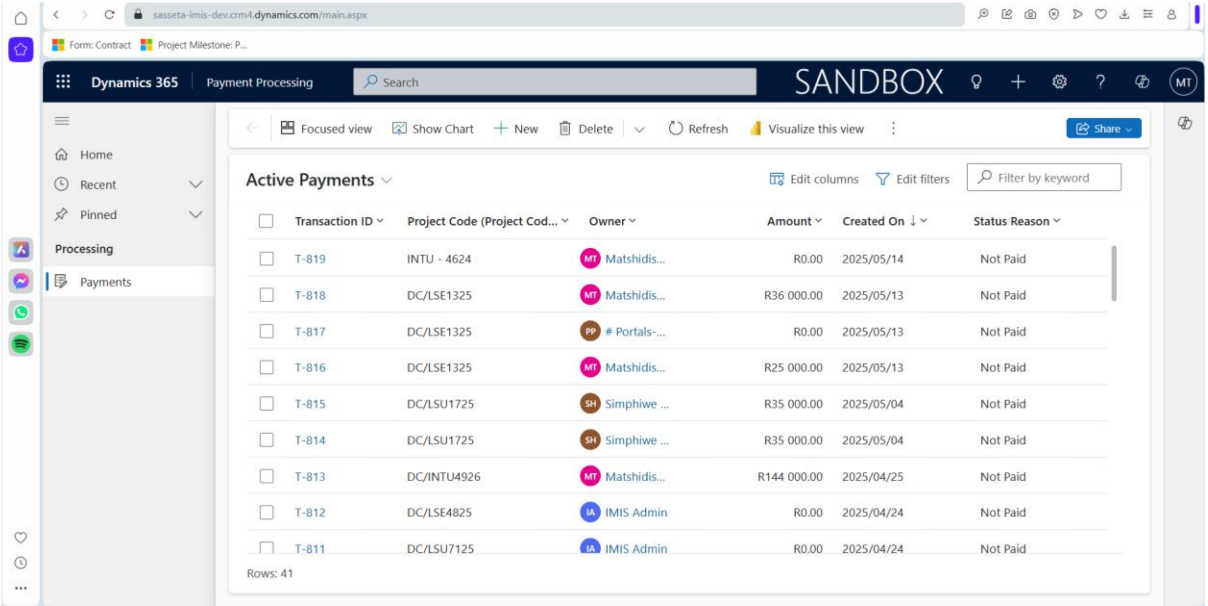




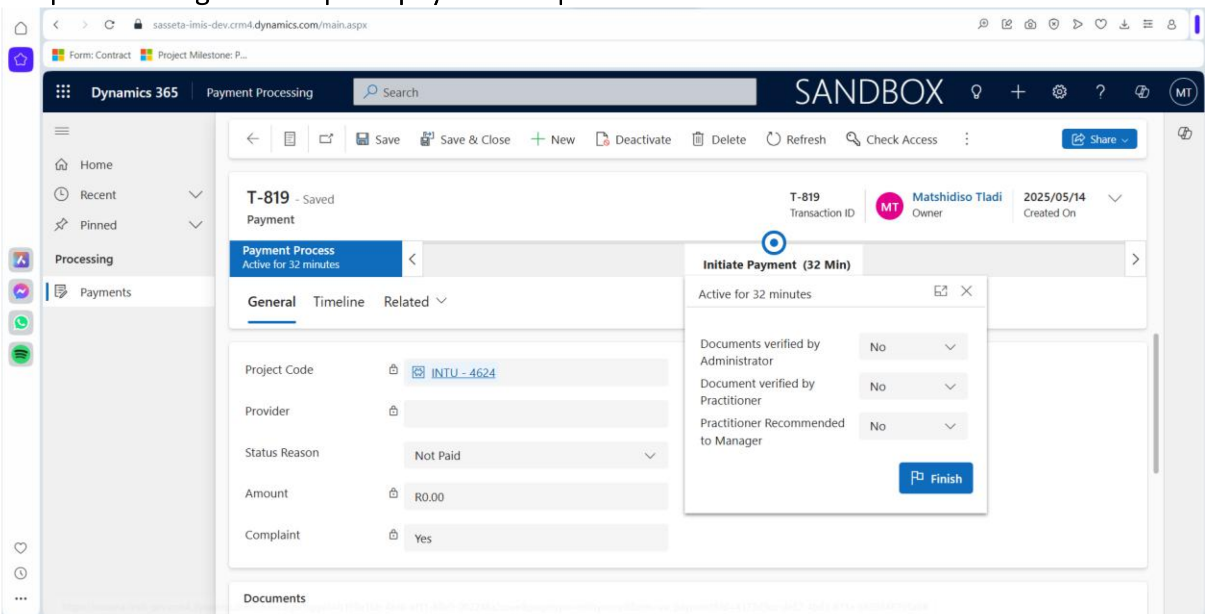
6. Payment documents can be directly uploaded to adobe for signature and attached on documents section
7. The practititoner can follw up by email or call with the provider to upload requested milestone documents
8. To send the payment to payment processing all project milestone documents should be complaint and the payment should be on status complaint
9. Complete payment verification and financial memo section

5.1.5 PAYMENT PROCESSING APP – FIANANCE

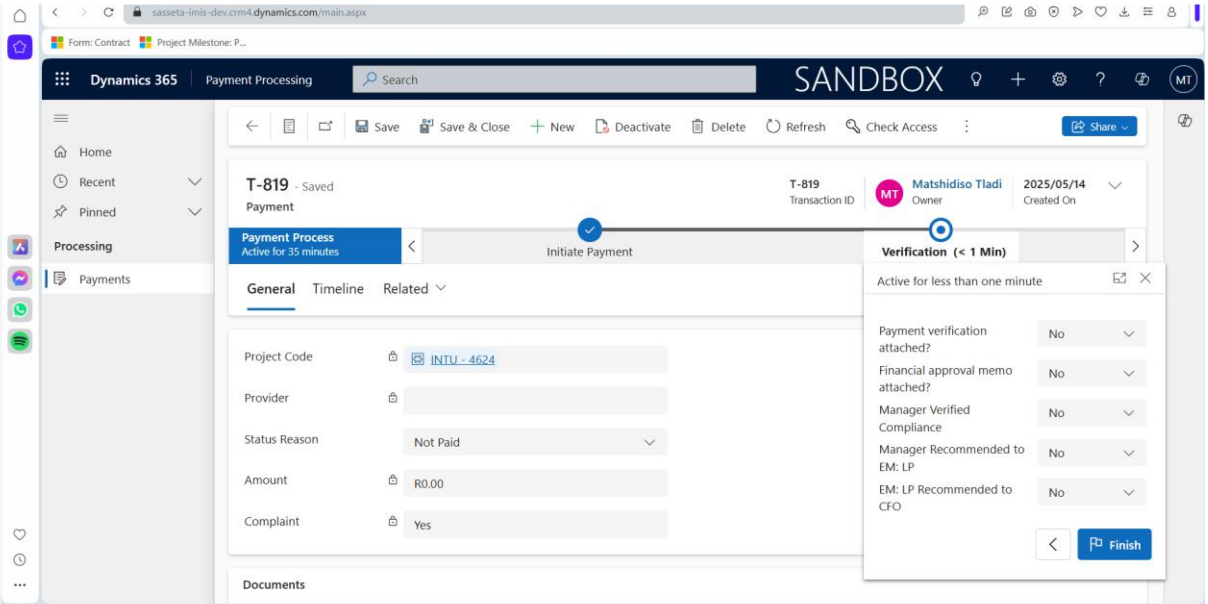
1. Milestone Payment can changed from Not paid to Paid by fianance team
2. Fianance team can attached Payment varification – On the Payment processing app



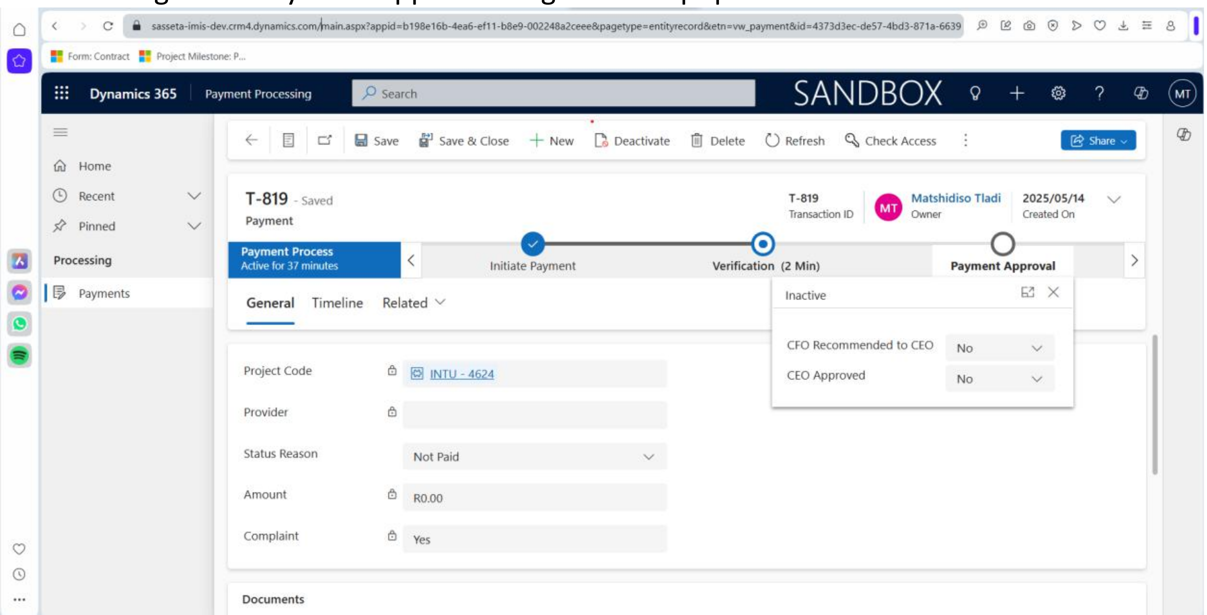
3. The above view is for the fianance team , finance personnel will follow the business process stage to complete payment request



4. After verification fianance can click on yes for all intial payment stage
5. Move to next stage and select relevant data representing the payment



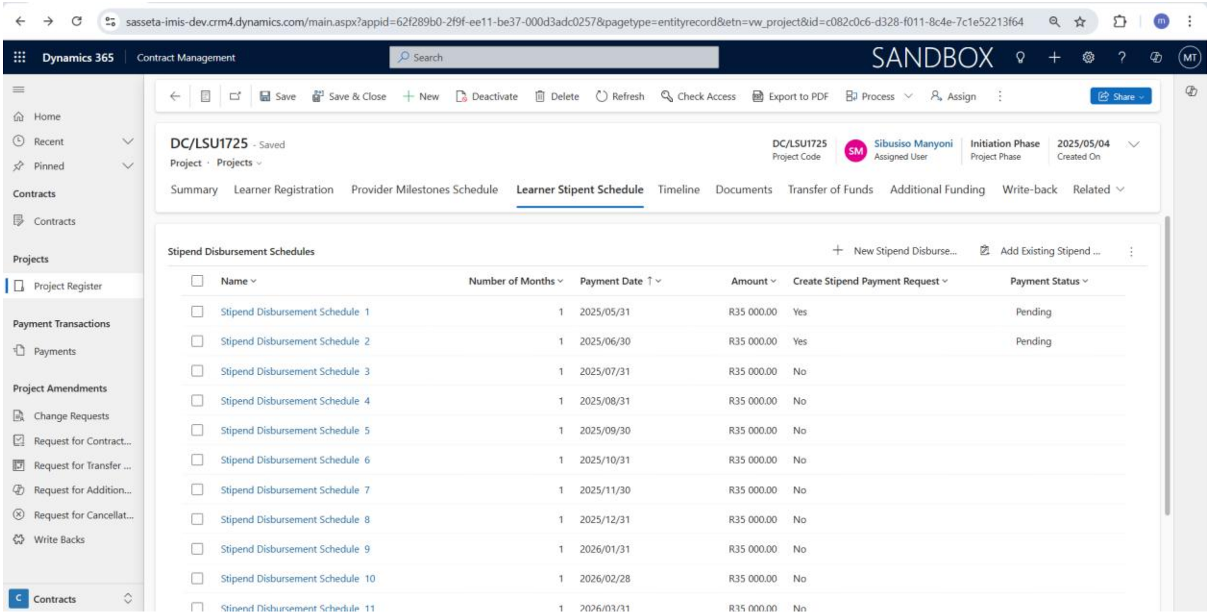
6. Navigate to Payment Approval Stage for and populate fields



7. Click on Yes and change the status of a status reason from Not Paid to paid

5.1.6 LEARNER STIPEND SCHEDULE.

1. Navigate to Learner Stipend Schedule, Stipend Schedule records will be created according to defined process on the contract based on the following fields on a contract.

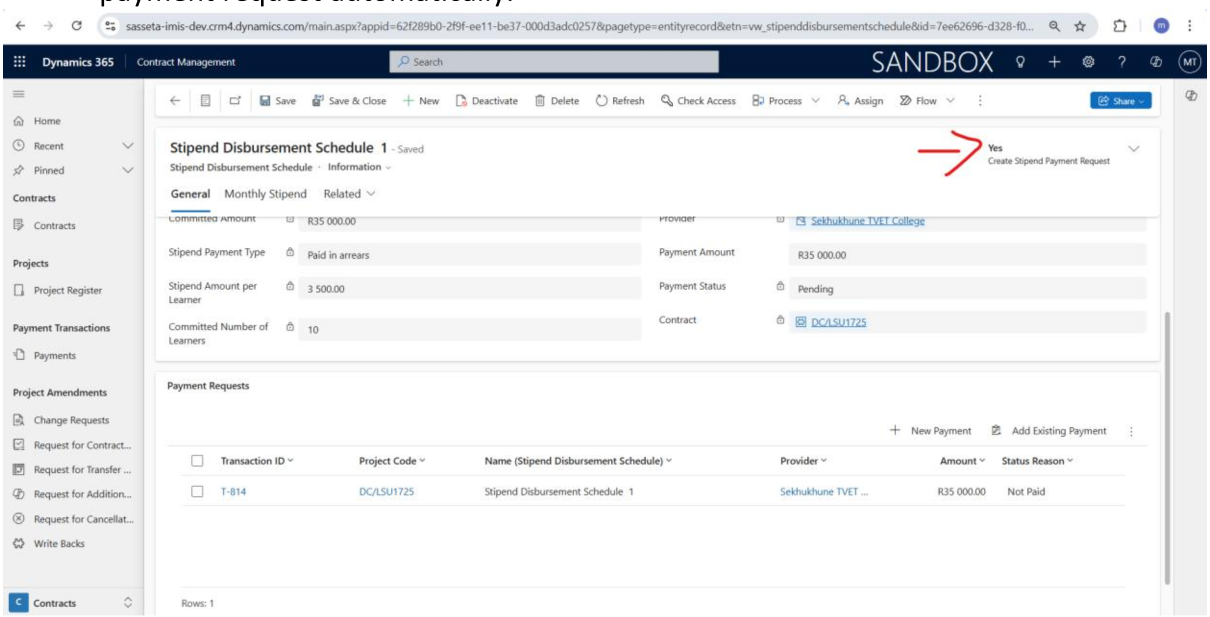


- if this is a stipend contract
- payment frequency
- paid in areas or advance.

Note: This has already been defined on contract record.

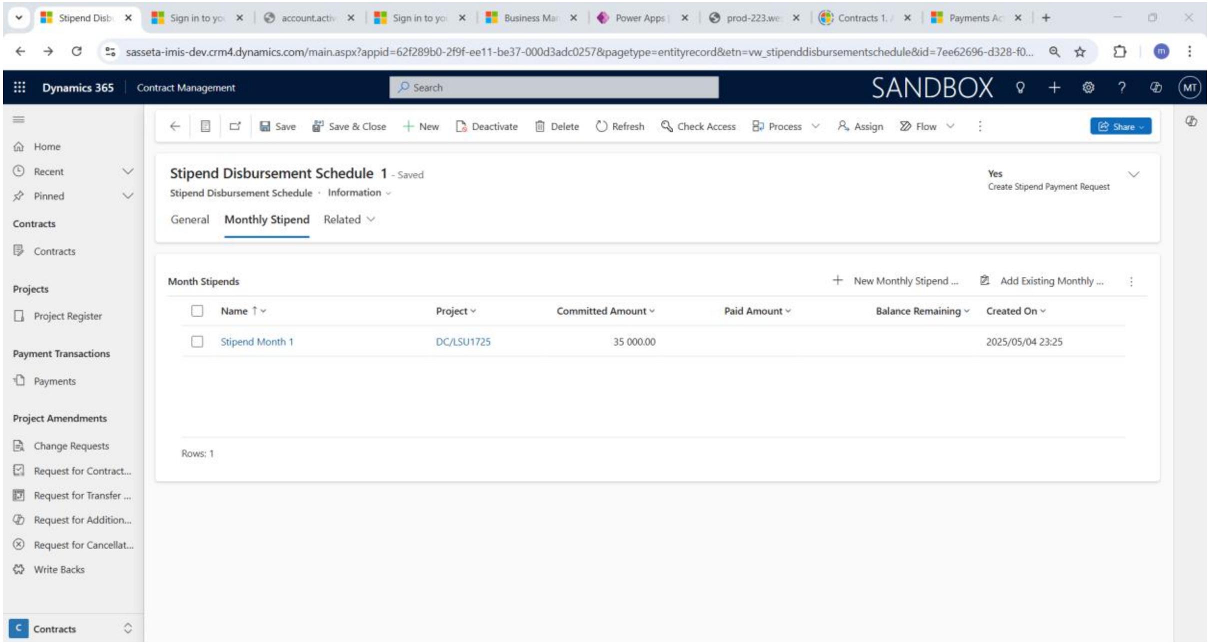
2. Double Click on the stipend Disbursement to open it

3. Click Create Stipend Payment Request to yes to create monthly stipends and payment request automatically.

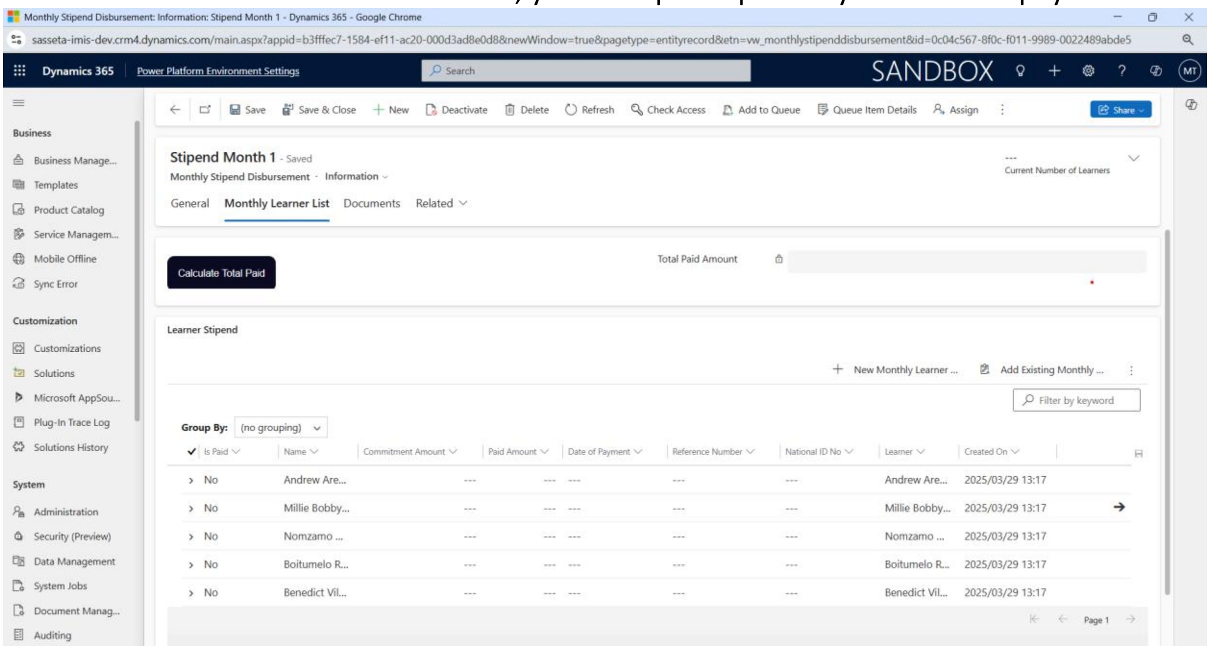


4. To Request Stipent Payment documents from provider or to modify the payment for processing oepn the payment request
5. This create Stipend Documents need for updload

6. To proccced with payment until completion follow the same steps from 5.1. 6 number 3 and the entire 5.1.5
7. To run and update Leaner payments based on uploaded attandance register click on Monthly Stipend Tab

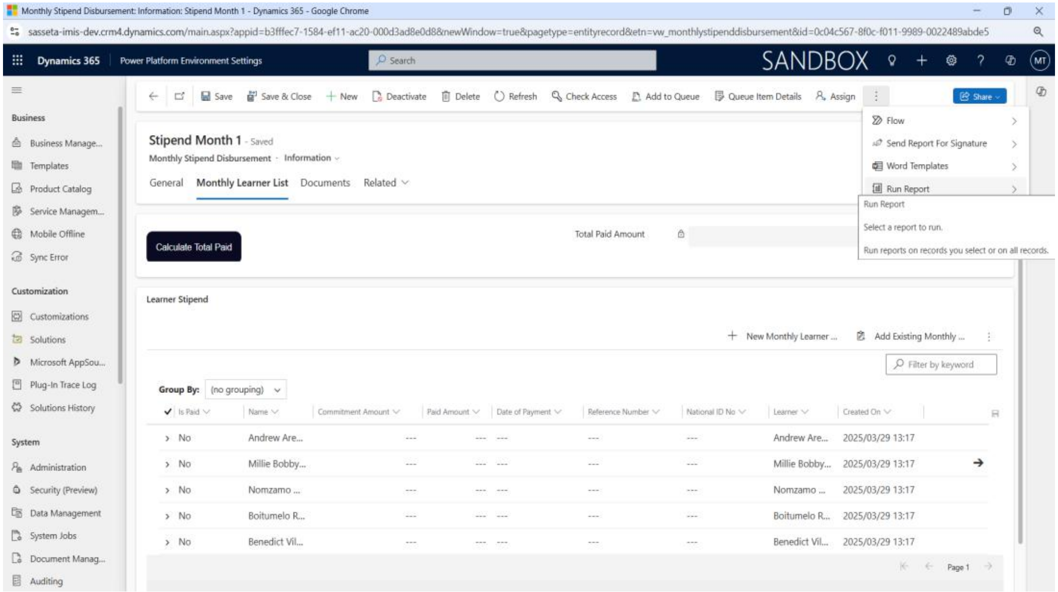


8. Open Stipend Monthly record
9. Navigate to Monthly Learner List record
10. Registered Learners will be displayed under Leaner Stipend
11. The practioners can click on leaner and update this , commitment amount is the amount that was agreed fro each lerner on the project , Paid amount is what is due to learner based on attandance , you can update paid to yes or no and payment date

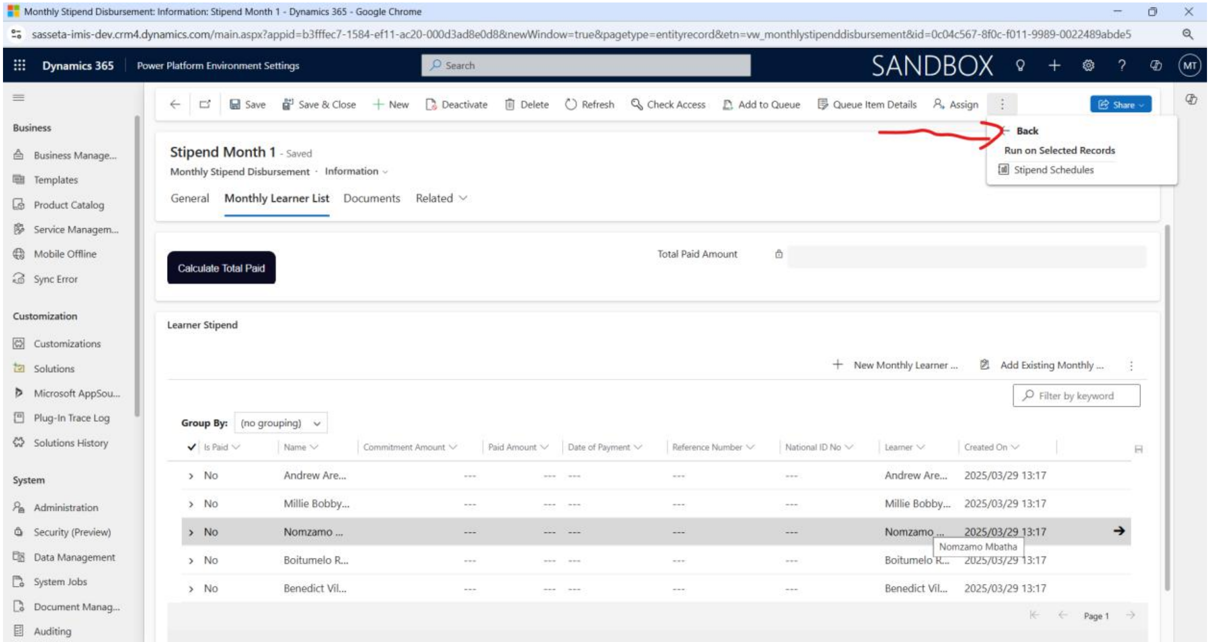


12. On Completion of the update click on **Calculate Paid Total,** to update the total paid.
13. This total will be displayed on the stipend and the outstanding balance.

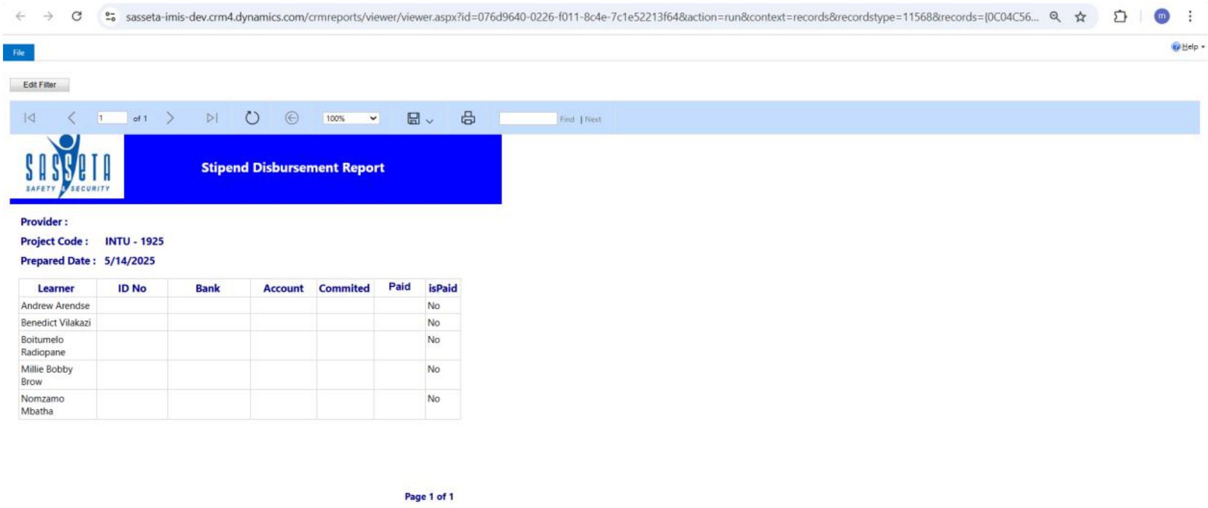
14. The outstanding balance will be rolled up to stipend schedule for all the monthlies belonging to that Stipend Disbursement Schedule
15. The Practitioner needs to make note of the commitment amount and the payment amount on the stipend schedule, the remining balance should be rolled off to the next stipend schedule.
16. To run stipend report on a monthly, ensure you are inside the monthly, click on 3 dots as per below screen, click on Run report.



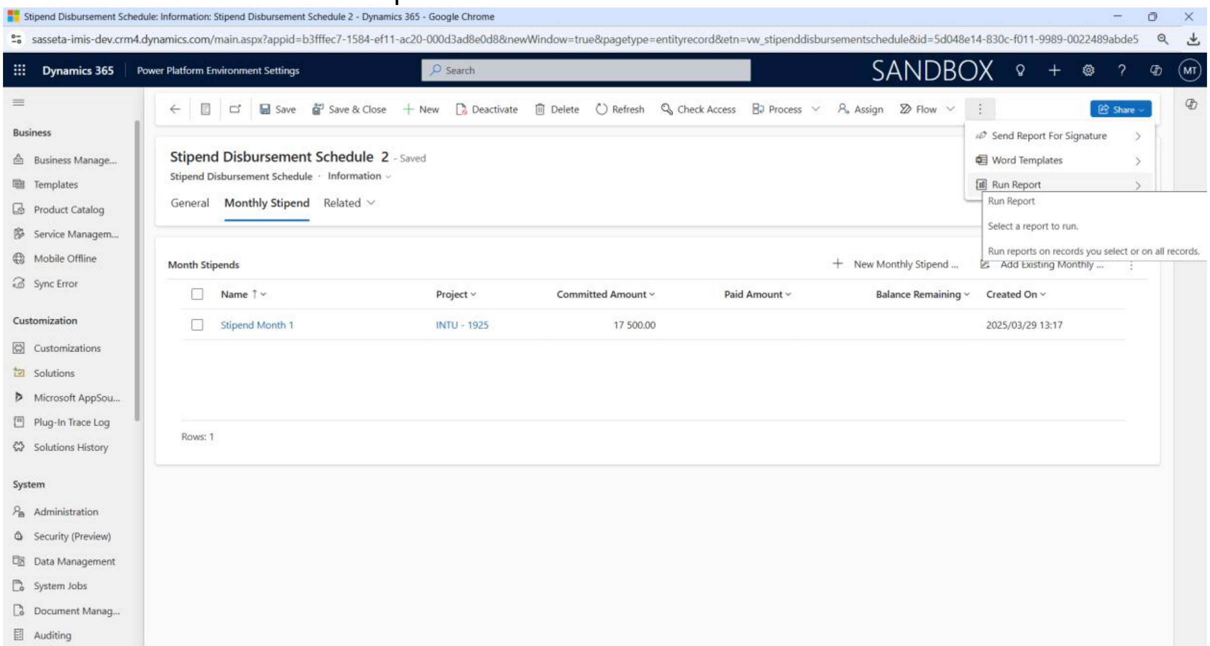
17. Click on stipend Schedules on the Run on Selected Records



18. This will open a new page for the report



19. To downlaod report click on export icon and select preffered download format , once you click on the ofrmat , the report will be downloaded to your local machine, under downloads , you can access it from there
20. To view and Run Stipend Schedule Disburment report for all the monthlies , navigae back to Stipend Disbursment Schedule page
21. Click on 3 dots then run report

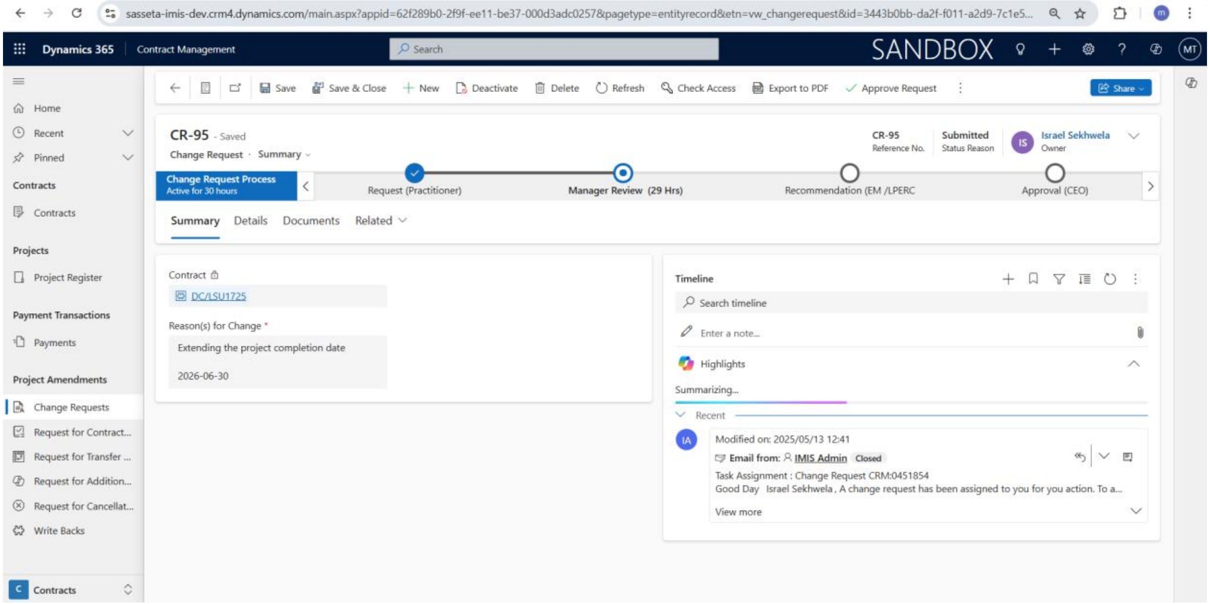


22. Click on Stipend Disbursment Summary
23. This will open a new page to run the report follow step 19 above to download the report
24. Repeat this process from 1 above for each new Stipend Dirsementent Schedule

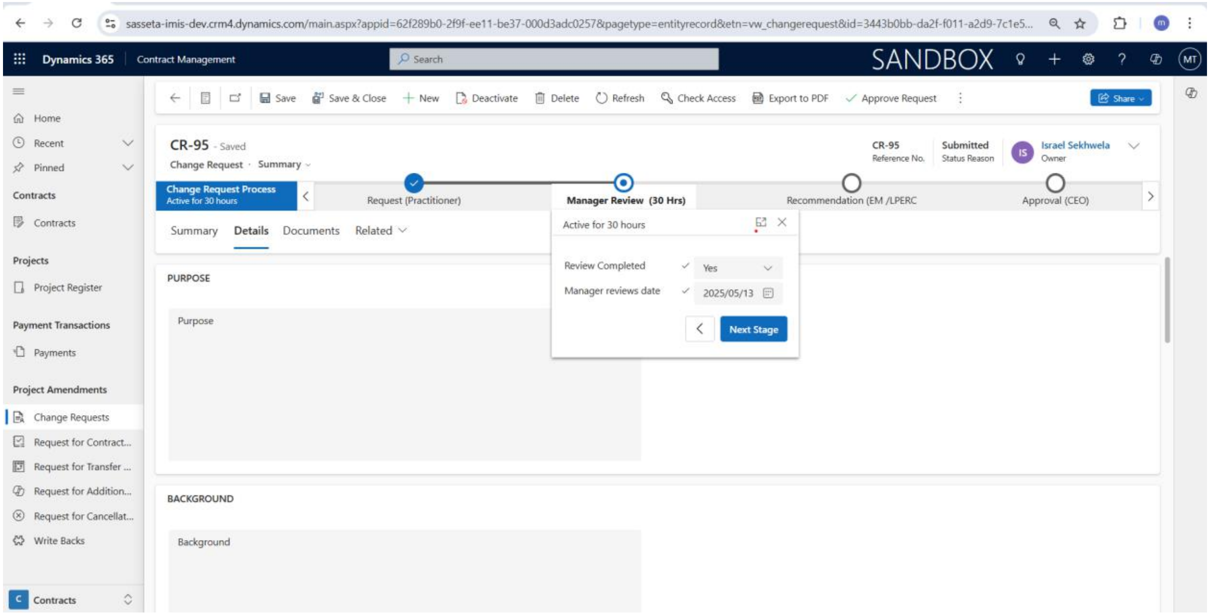
5.2 PROJECT AMMENDMENTS

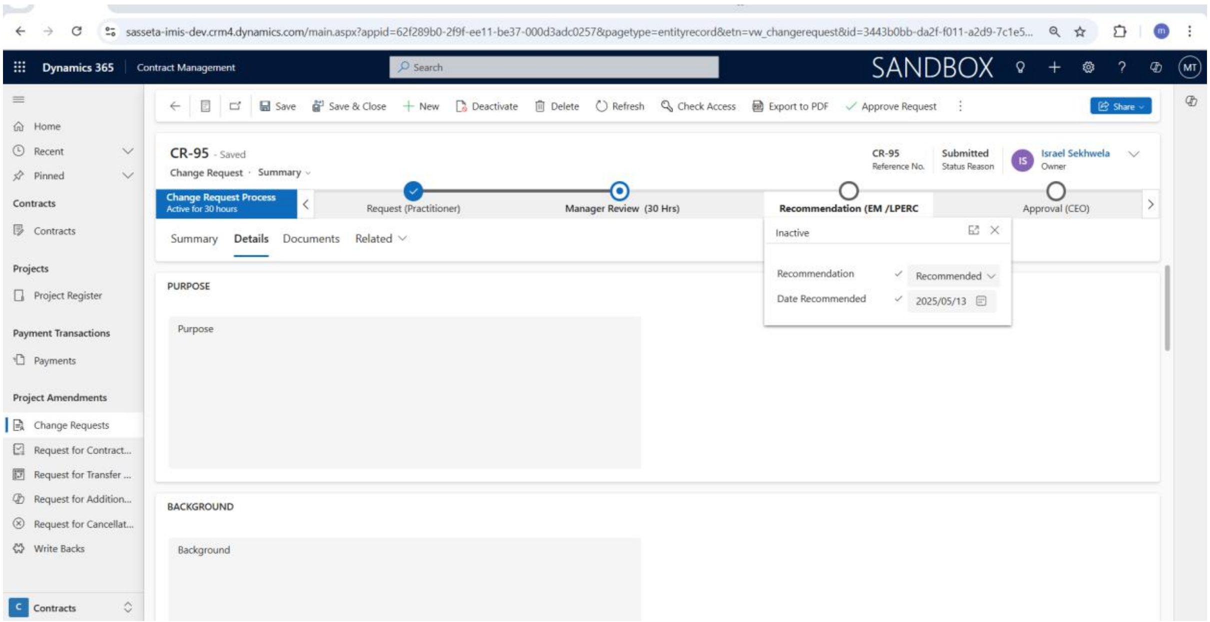
5.2.1 CHANGE REQUEST

1. Change For change requests can be create on both the portal by the provider and on IMIS.
2. Populate the Details Tab
3. Download relevant Change Request Document on word templates section.
4. Attach document on the documents section.
5. Move the Chage request from Request Stage to Manager Review
6. Assign change request record to the manager for approval.



7. The Manager will receive change request approval notification.
8. Open the change request and selected yes for *Review completed* and populate Manager *Review date.*


Dynamics 365
Contract Management
Search
SANDBOX
Save
Save & Close
New
Deactivate
Delete
Refresh
Check Access
Export to PDF
Approve Request
Share
Home
Recent
Pinned
Contracts
Contracts
Projects
Project Register
Payment Transactions
Payments
Project Amendments
Change Requests
Request for Contract...
Request for Transfer ...
Request for Addition...
Request for Cancellat...
Write Backs
CR-95 - Saved
Change Request · Summary
CR-95
Reference No.
Submitted
Status Reason
Israel Sekhwela
Owner
Change Request Process
Active for 30 hours
Request (Practitioner)
Manager Review (30 Hrs)
Recommendation (EM /LPERC
Approval (CEO)
Summary
Details
Documents
Related
Active for 30 hours
Review Completed
Yes
Manager reviews date
2025/05/13
Next Stage
PURPOSE
Purpose
BACKGROUND
Background


Dynamics 365
Contract Management
Search
SANDBOX
Save
Save & Close
New
Deactivate
Delete
Refresh
Check Access
Export to PDF
Approve Request
Share
Home
Recent
Pinned
Contracts
Contracts
Projects
Project Register
Payment Transactions
Payments
Project Amendments
Change Requests
Request for Contract...
Request for Transfer ...
Request for Addition...
Request for Cancellat...
Write Backs
CR-95 - Saved
Change Request · Summary
CR-95
Reference No.
Submitted
Status Reason
Israel Sekhwela
Owner
Change Request Process
Active for 30 hours
Request (Practitioner)
Manager Review (30 Hrs)
Recommendation (EM /LPERC
Approval (CEO)
Summary
Details
Documents
Related
Inactive
Recommendation
Recommended
Date Recommended
2025/05/13
PURPOSE
Purpose
BACKGROUND
Background