

CONTRACT MANAGEMENT

Training Manual



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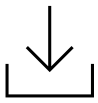
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1 OVERVIEW

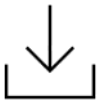
Microsoft Dynamics 365 for Contract Management is designed to define and streamline contracting and project management processes, providing users with a centralized point of reference for the efficient management of project milestones, stipend disbursements.



- Contract Signing



- Contract Addendum

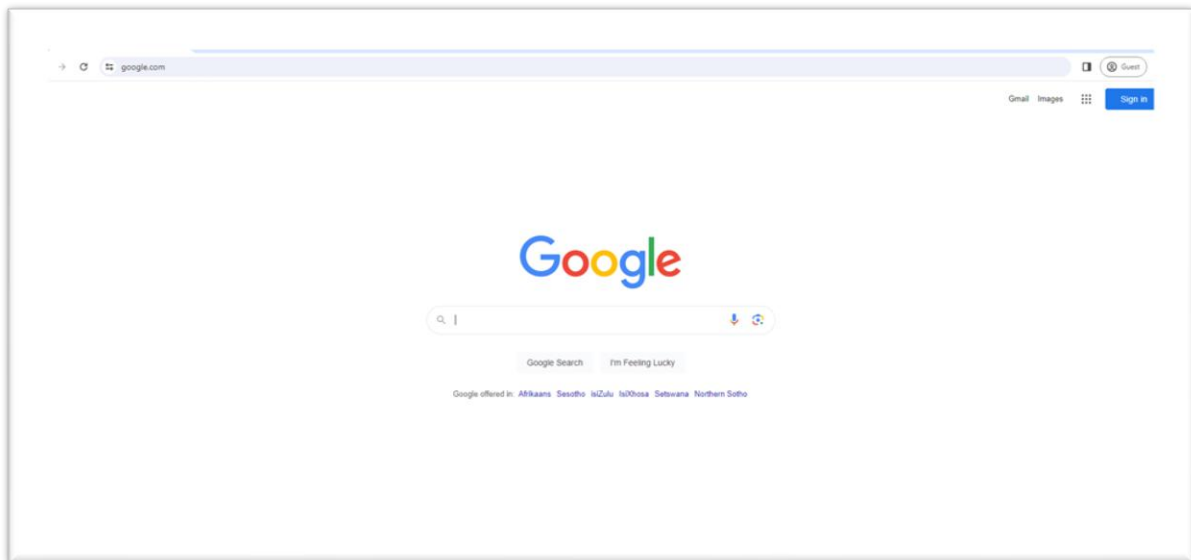


- Project Management

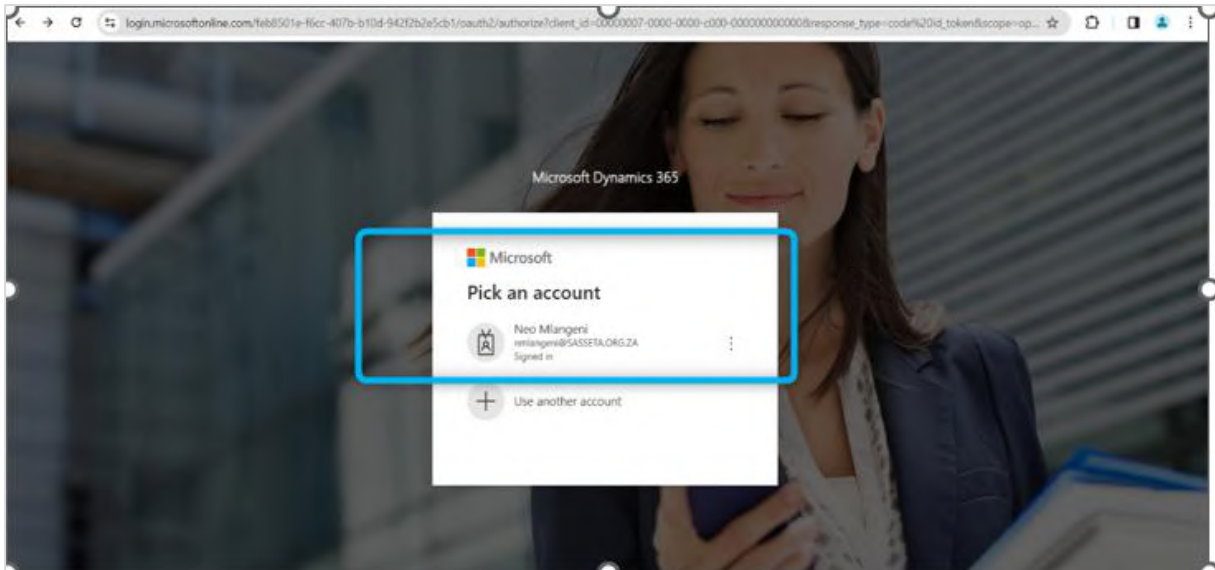


- Project Close

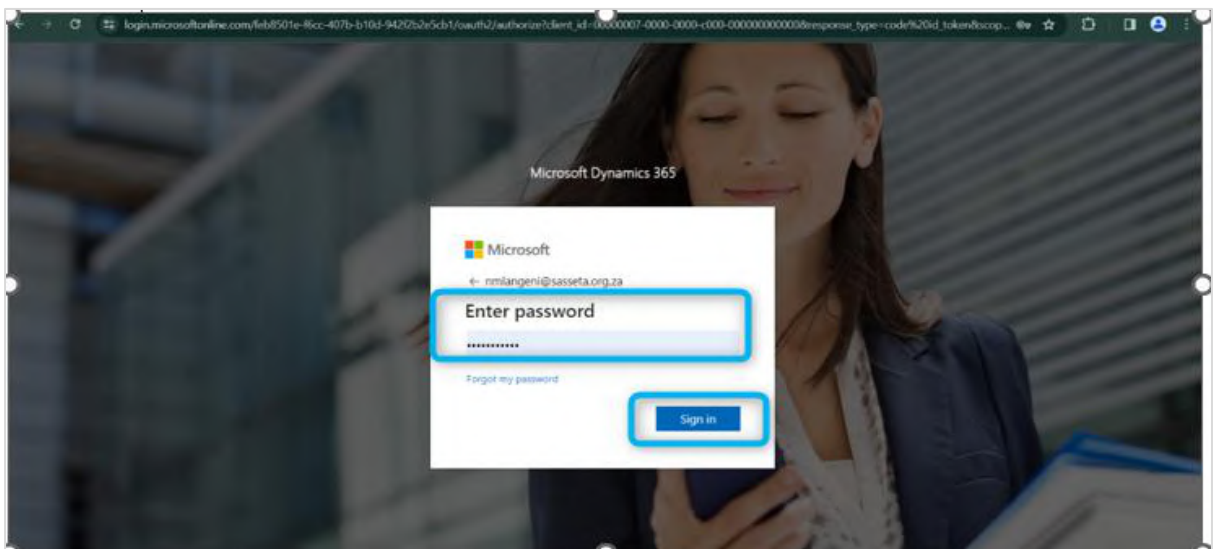
2 HOW TO LOGIN INTO THE IMIS



Step	Action
1.	<p>Launch the internal system:</p> <ul style="list-style-type: none">• Open any browser of your choice.• Insert the following URL into your browser: https://sasseta-imis-aut.crm4.dynamics.com/• Click enter.



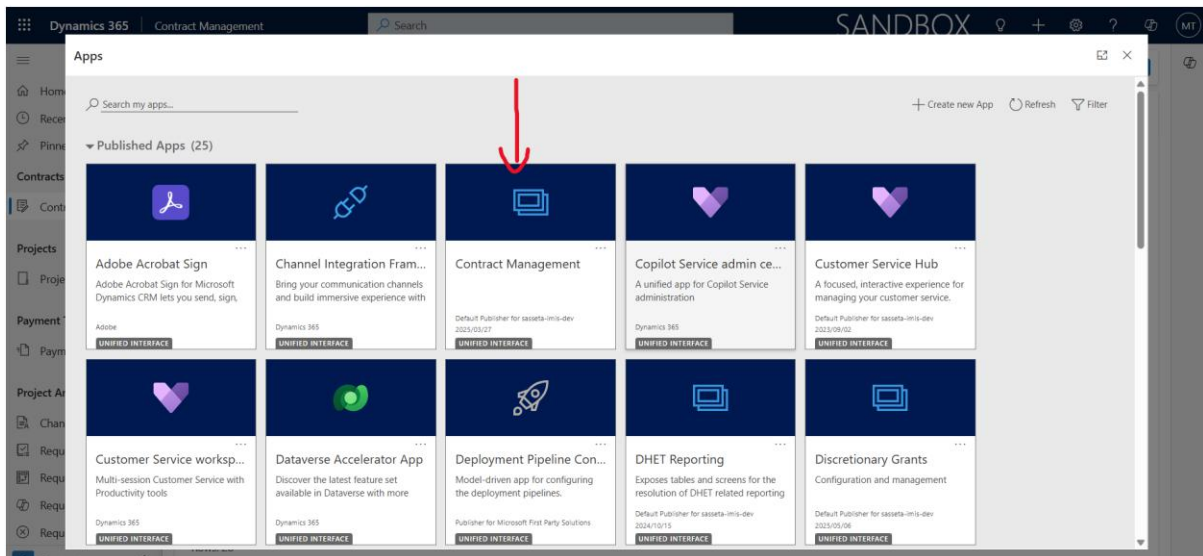
Step	Action
2.	<p>You will be prompted to sign in with your SASSETA account.</p> <ul style="list-style-type: none"> • Click the e-mail textbox. • Type in your valid e-mail address • Press enter



Step	Action
3.	<ul style="list-style-type: none"> 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.	<p>Application Is Running: Note that the respective application icon appears in the browser tab if the application is running.</p> <ul style="list-style-type: none"> Click the Contract Management app. The Contract Management form will be opened.

4 NAVIGATION

← → ↻ sassetta-imis-dev.crm4.dynamics.com/main.aspx?appid=62f289b0-2f9f-ee11-be37-000d3adc0257&pagetype=entitylist&etn=vw_contract&viewid=0d97c9e2-7d7b-499a-add4-7d9a68bf31b0&... SANDBOX

Dynamics 365 | Contract Management | Search

Home Recent Pinned Contracts Projects Payment Transactions Project Amendments Request for Contr... Request for Transf... Request for Additi... Request for Cance...

1. All Active Contracts Edit columns Edit filters Filter by keyword

<input type="checkbox"/>	Project Code	Programme Type	Project Name	Contract Type	Chambers	Employer	Provider
<input type="checkbox"/>	DC/LSE1325	Learnership	Security Training	Pivotal Programme	Defence	Sekhukhu...	24/7 Secu
<input type="checkbox"/>	DC/SPE5025	Skills Programmes	Defensive and Offensive Driving	Pivotal Programme	Defence	Sekhukhu...	2B MANA
<input type="checkbox"/>	DC/LSU8925	Learnership	Basic firefighting	Pivotal Programme	Defence	Sekhukhu...	2B MANA
<input type="checkbox"/>	DC/SPE4726	Skills Programmes	Patrol Officer Training Programme	Pivotal Programme	Defence	Sekhukhu...	1 SA INFA
<input type="checkbox"/>	BURSE2925	Bursary	Firearm Training	Pivotal Programme	Defence	Sekhukhu...	1 SA INFA
<input type="checkbox"/>	DC/LS8625	Learnership	Self Defense Mastery	Pivotal Programme	Defence	Sekhukhu...	007 INNC
<input type="checkbox"/>	DC/INTU4725	Internship	Digital Signing	Pivotal Programme	Defence	Sekhukhu...	Sekhukhu
<input type="checkbox"/>		Qualification	Dog Handling	Pivotal Programme	Defence	Molepo T...	Molepo Ti
<input type="checkbox"/>	DC/INTU6325	Internship	Program	Pivotal Programme	Defence	Sekhukhu...	't Hart Sel
<input type="checkbox"/>	INTU - 6026	Internship	Testing Digital Signing	Pivotal Programme	Defence	Sekhukhu...	Sekhukhu
<input type="checkbox"/>							

Rows: 28

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

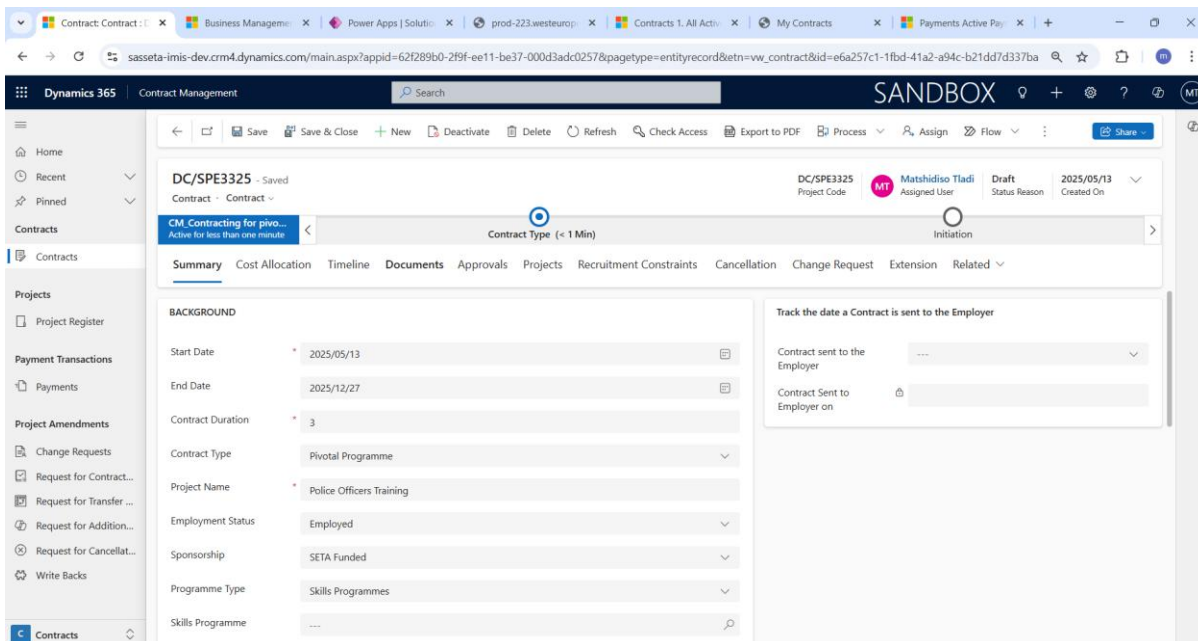
4.1 CONTRACT RECORDS

The screenshot displays the Dynamics 365 Contract Management interface. The left-hand navigation pane includes sections for Home, Recent, Pinned, Contracts, Projects, Payment Transactions, and Project Amendments. The main content area shows a table titled "1. All Active Contracts" with columns for Project Code, Programme Type, Project Name, Contract Type, Chambers, Employer, and Provider. The table lists various contracts, including those for Security Training, Defensive and Offensive Driving, Basic firefighting, Patrol Officer Training Programme, Firearm Training, Self Defense Mastery, Digital Signing, Dog Handling, and Testing Digital Signing. The interface also includes a search bar, a "Filter by keyword" option, and a "Rows: 28" indicator at the bottom.

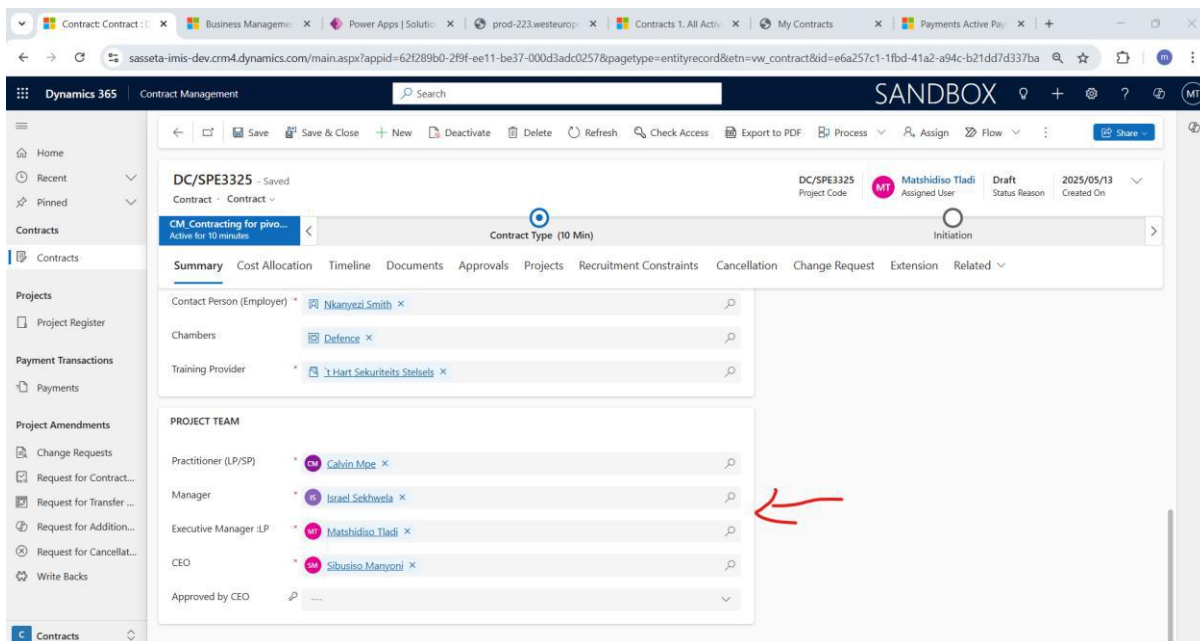
Project Code	Programme Type	Project Name	Contract Type	Chambers	Employer	Provider
DC/LSE1325	Learnership	Security Training	Pivotal Programme	Defence	Sekhukhu...	24/7 Secu
DC/SPE5025	Skills Programmes	Defensive and Offensive Driving	Pivotal Programme	Defence	Sekhukhu...	28 MANA
DC/LSU8925	Learnership	Basic firefighting	Pivotal Programme	Defence	Sekhukhu...	28 MANA
DC/SPE4726	Skills Programmes	Patrol Officer Training Programme	Pivotal Programme	Defence	Sekhukhu...	1 SA INFA
BURSE2925	Bursary	Firearm Training	Pivotal Programme	Defence	Sekhukhu...	1 SA INFA
DC/LS8625	Learnership	Self Defense Mastery	Pivotal Programme	Defence	Sekhukhu...	007 INNC
DC/INTU4725	Internship	Digital Signing	Pivotal Programme	Defence	Sekhukhu...	Sekhukhu
	Qualification	Dog Handling	Pivotal Programme	Defence	Molepo T...	Molepo Ti
DC/INTU6325	Internship	Program	Pivotal Programme	Defence	Sekhukhu...	'i Hart Sel
INTU - 6026	Internship	Testing Digital Signing	Pivotal Programme	Defence	Sekhukhu...	Sekhukhu

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

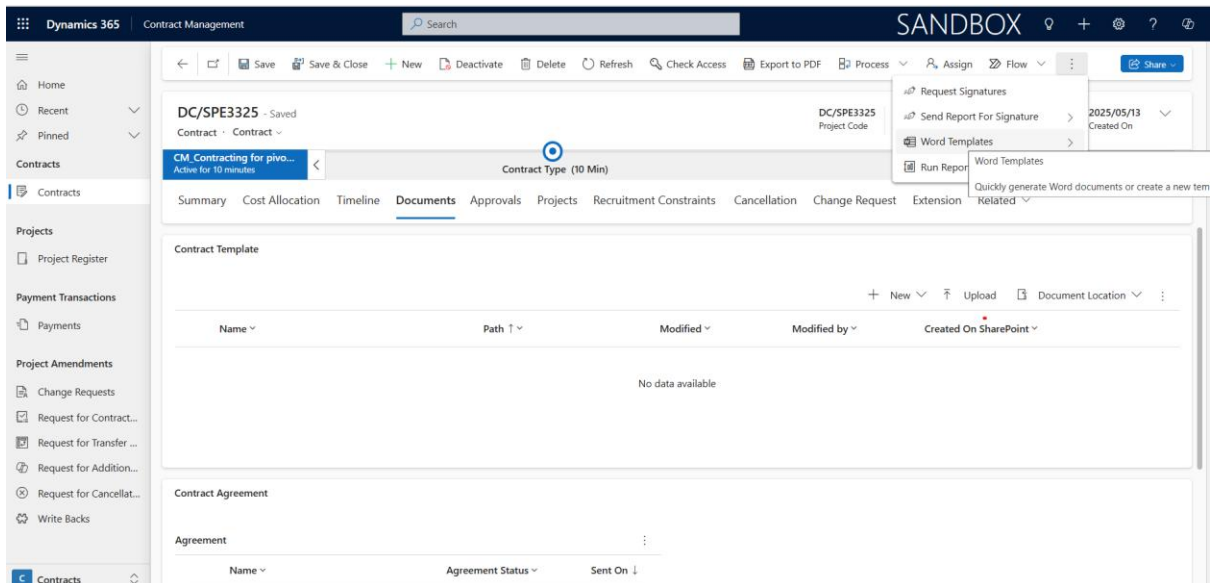
5 CONTRACT TEMPLATING



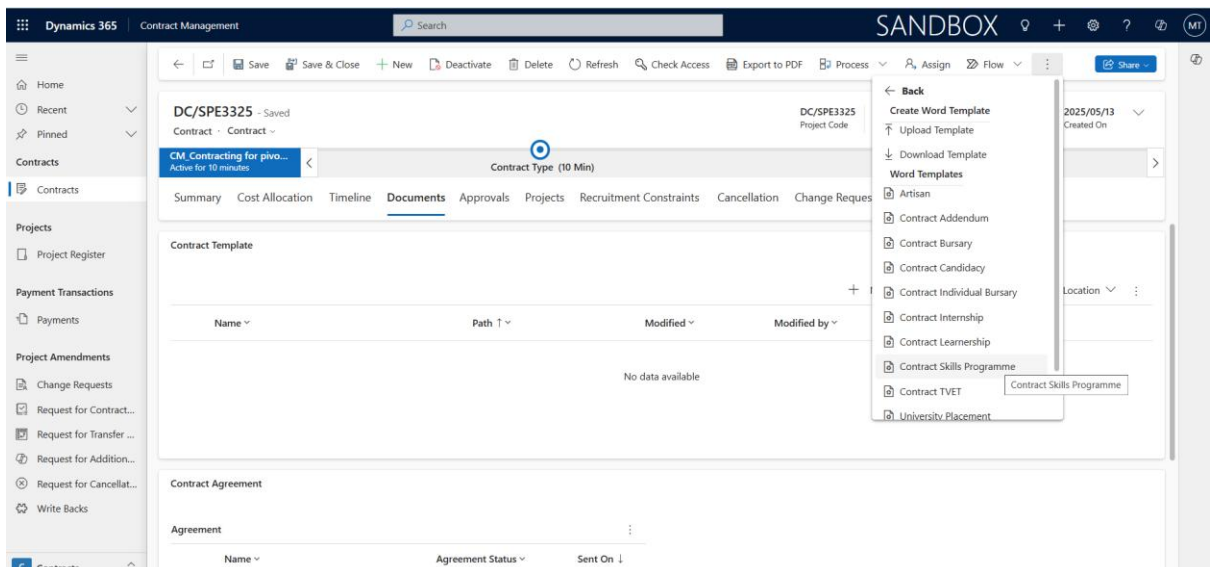
- **Step 1** Upon opening a contract, the following information will be automatically populated from DG:
Background Information
Parties Involved
Cost Allocation
- **Step 2** Data to be populated by the practitioner: Project Team Information



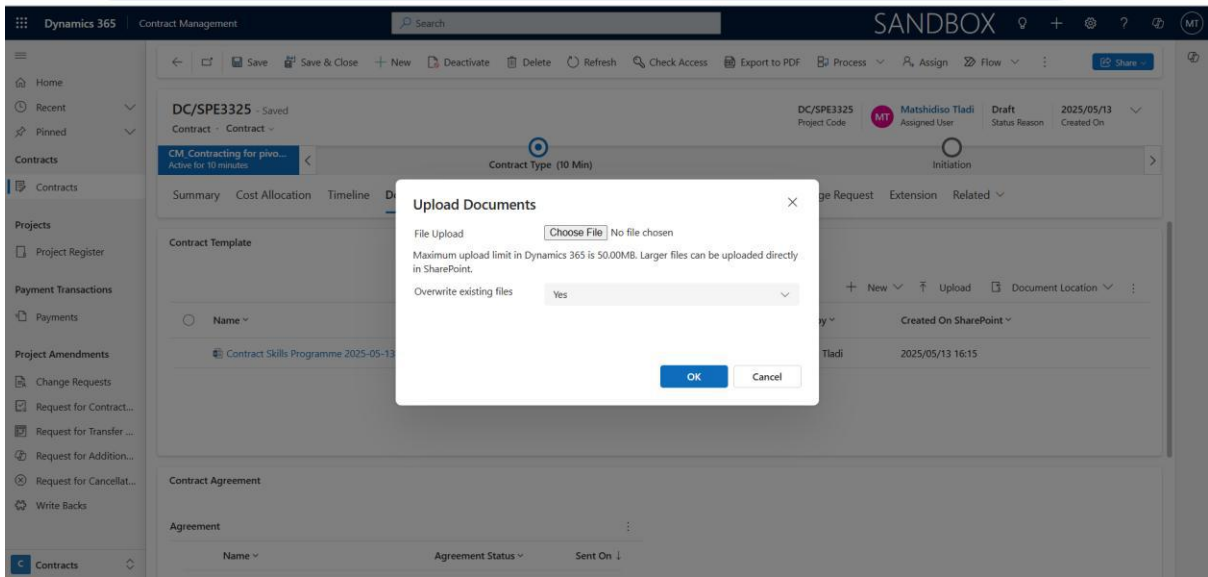
- **Step 3** Download Contract: Download Contract Template and Send to Employer for approval.



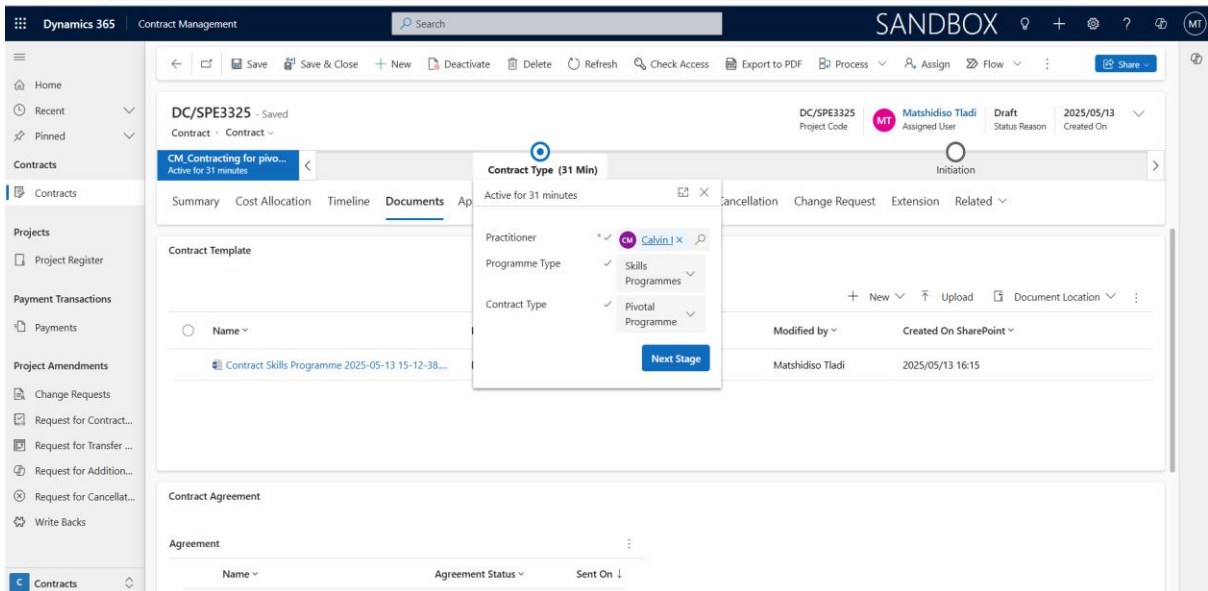
NB: Ensure the selected contract the selected template matches the contract programme type.



- **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

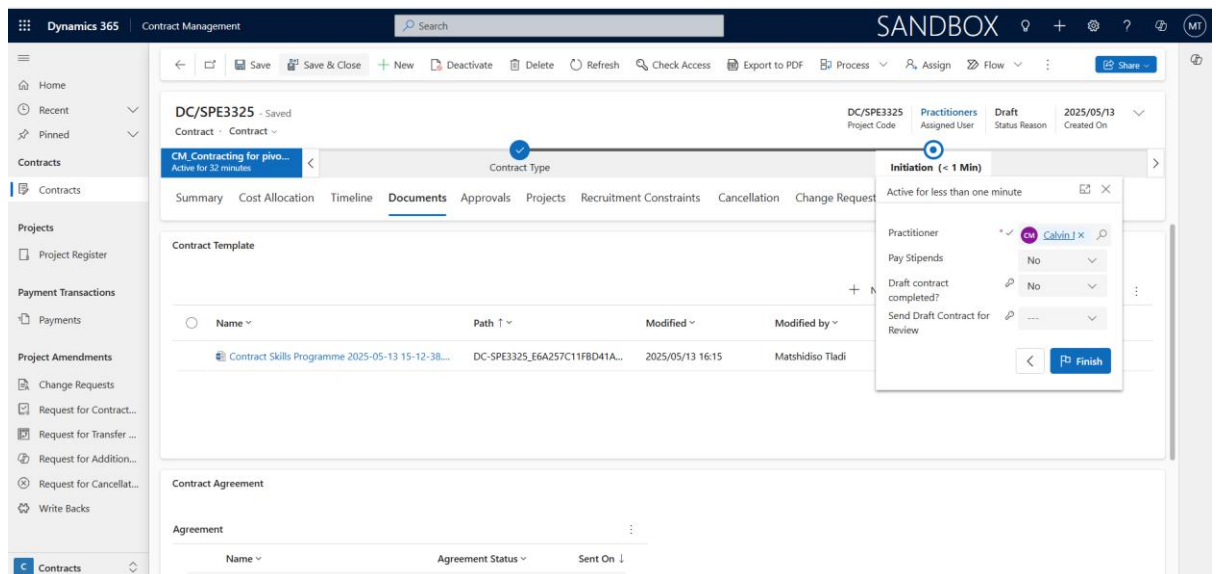


Step 4: Navigate to Contract Business Process, on Contract type stage click on next stage

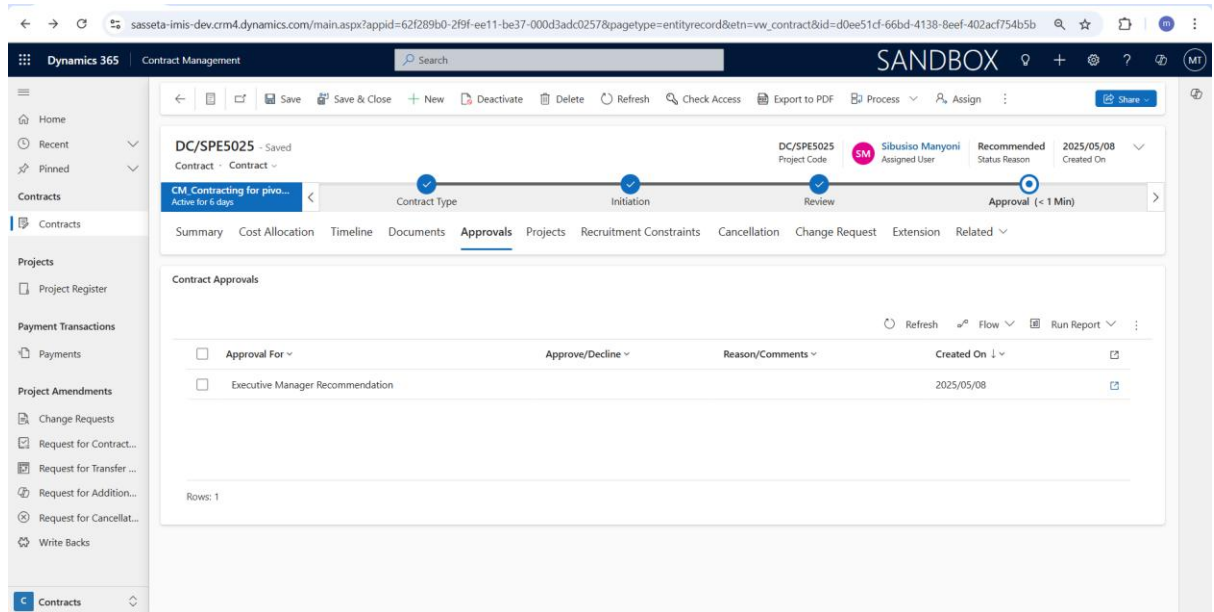


- **Step 5:** The step in 4 above will navigate you to Initiation stage.

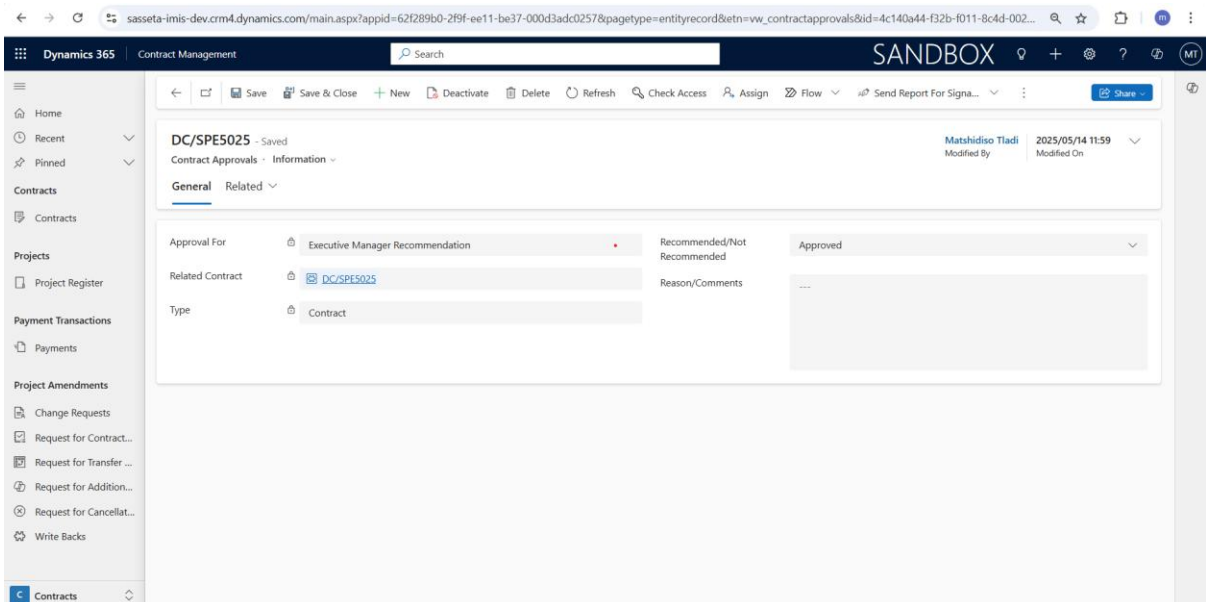
- **Step 5:** If this is a Stipend Contract, click Yes for Pay Stipends; if not, click No.
- **Step 6:** If you select Yes, additional stipend fields will be displayed. Populate the required fields.
- **Step 7:** For the next contract approval, select Draft Contract Completed and set Send Draft Contract 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.



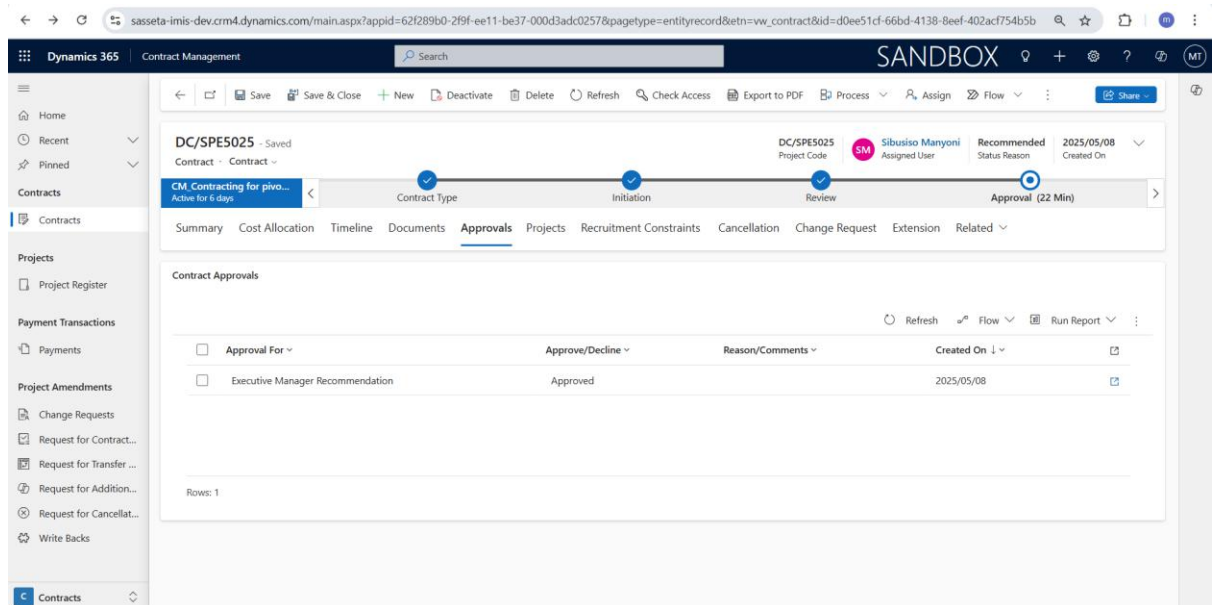
- **Step 11:** EM (Executive Manager) will receive an email to action the contract.
- **Step 12:** Navigate to Approvals Tab



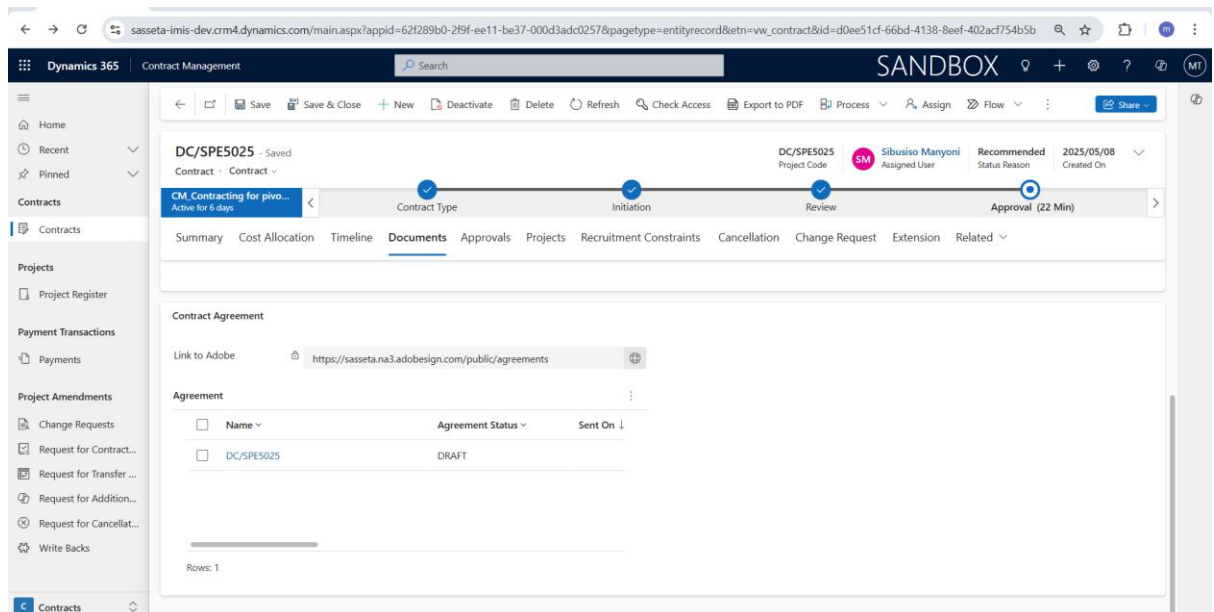
- **Step 13:** Open the EM Approval record by double clicking.
- **Step 14:** Select Recommended/Not Recommended
- **Step 15:** On Selection of *Recommended*, a notification is sent to practitioner to begin the signing process.
- **Step 16:** On Selection of *Not Recommend* the record notifies the practitioner.
- **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

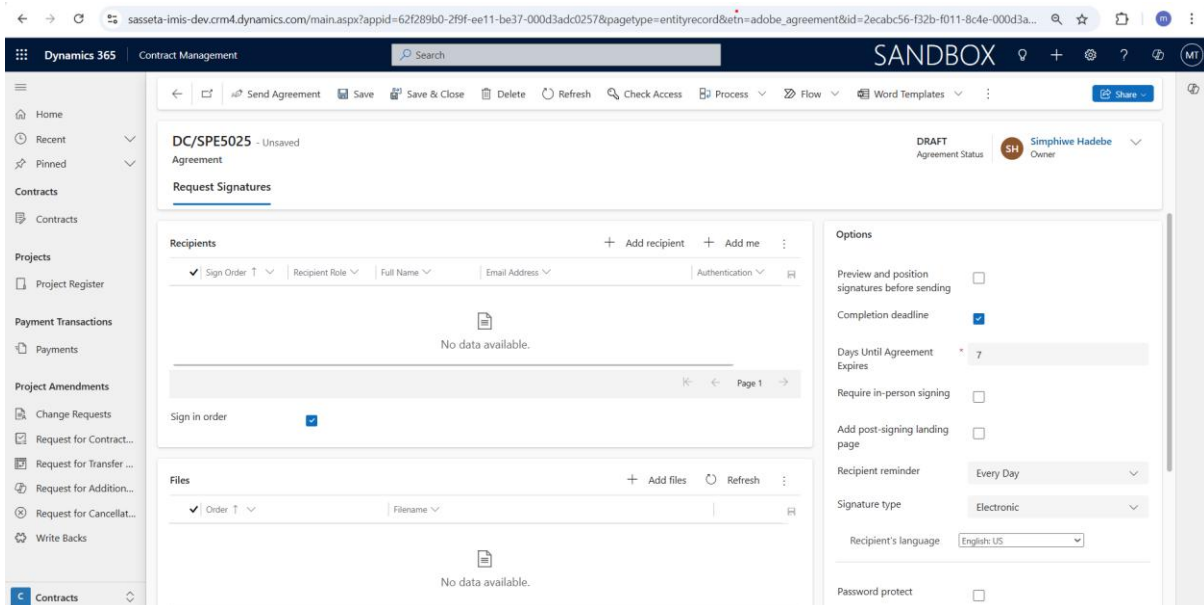


- **Step 19:** Under Contract Agreement section, adobe link and agreement record will be created.
- **NB:** To setup Adobe signing process all parties required to sign the document should be known before hand, make sure you have emails and names of all parties including witnesses.

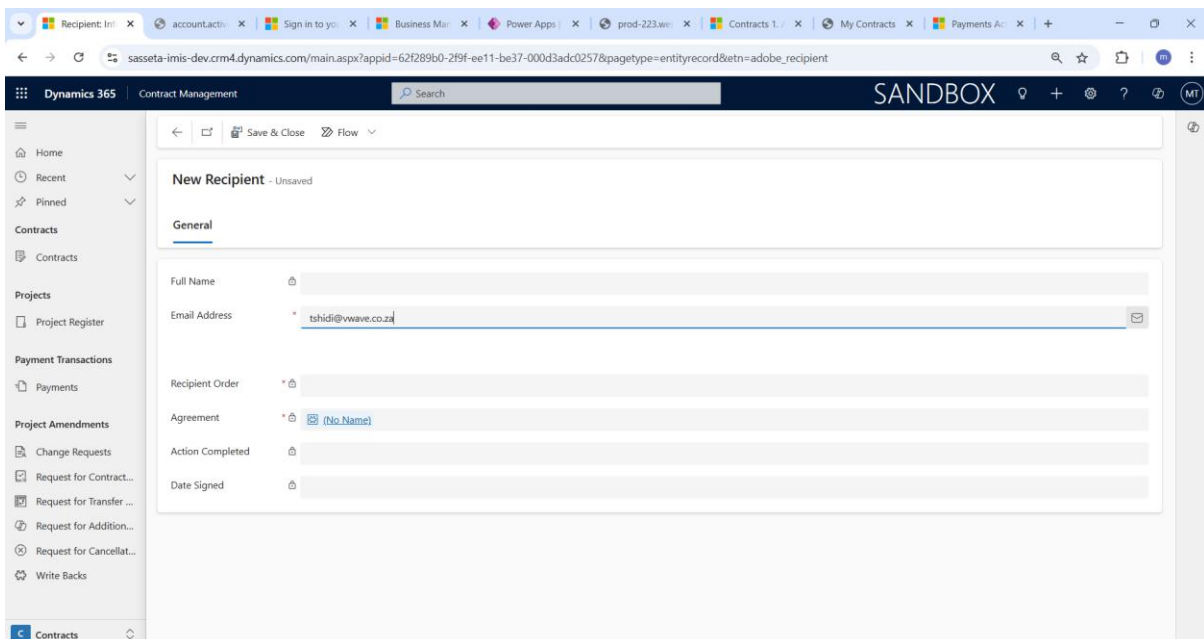


- **Step 20:** Click on the agreement record **DC/SPES025** to setup initial agreement parameters.
- **Step 21:** Select *Preview and Position Signatures Before Sending*
- **Step 22:** Sign Order should be selected; this ensures the document is send according to the specified signing order.

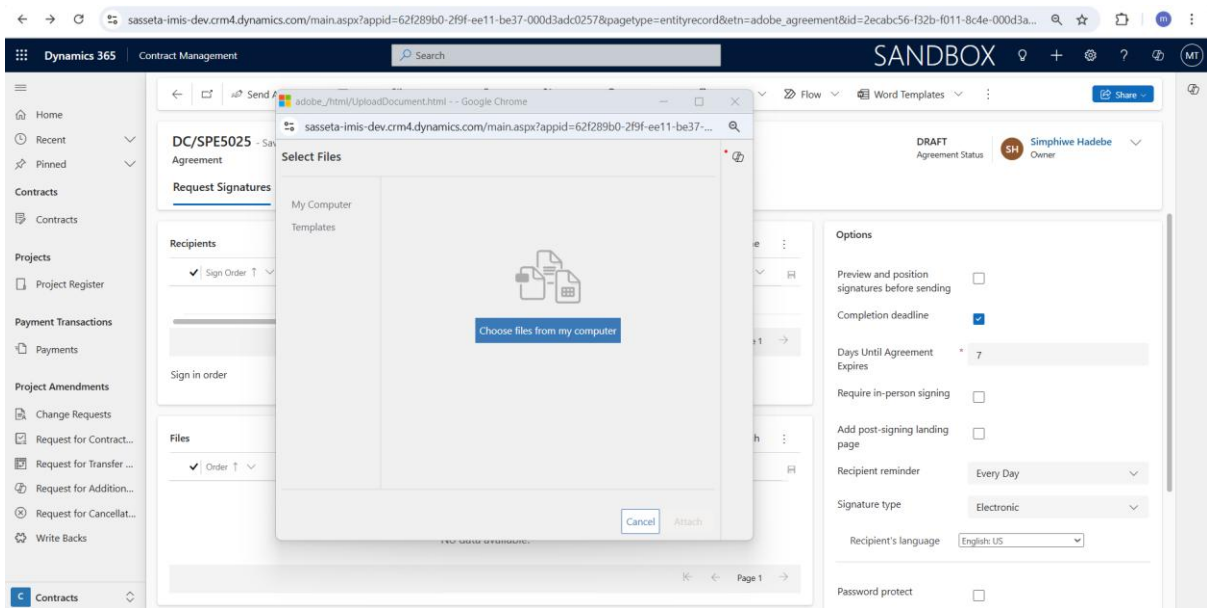
- **Step 23:** Under Recipients section, click on *+ Add recipients'* button, add at least one email address, the first signatory, or all parties, note that if a signatory is not added here, you can add it on adobe UI later.
- **Step 24:** On the Files section click on *+ Add Files* button, attach the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



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

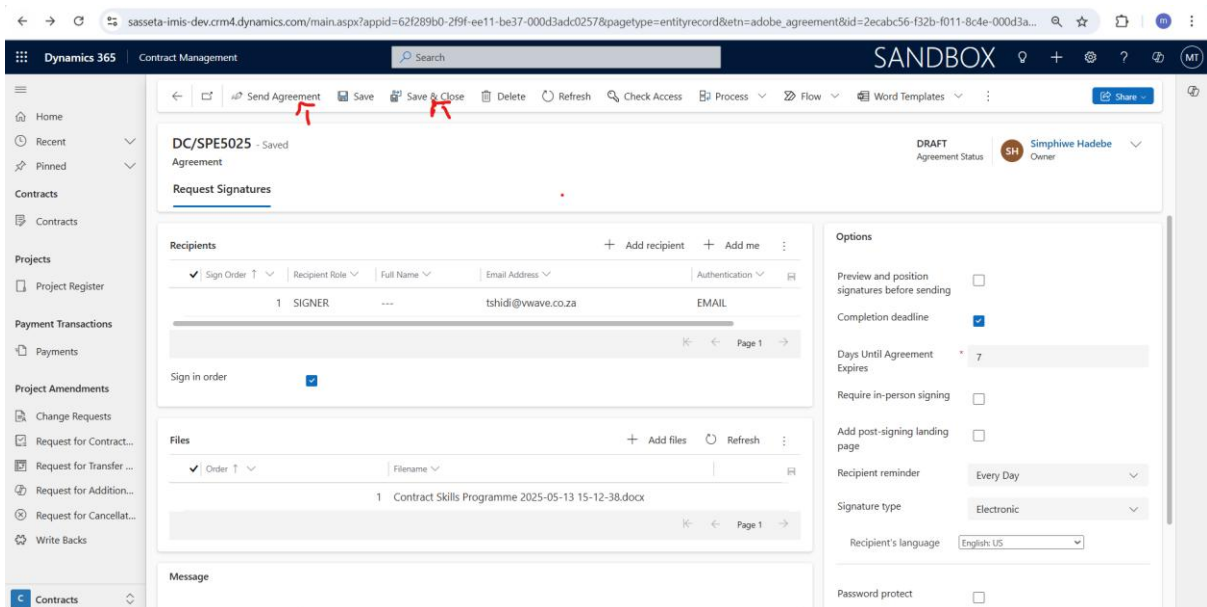


Step 27: Add Files Page, click on choose files from Computer



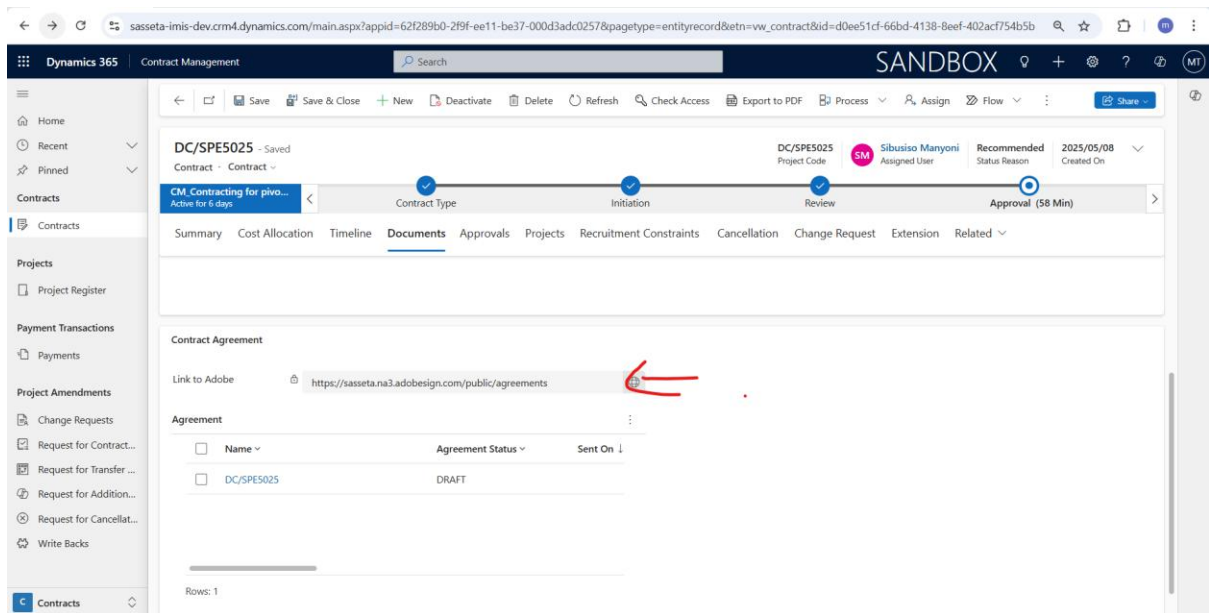
Step 28: On the agreement record ribbon, click on **Send Agreement** button, the status of the agreement record changes from *Draft* to *Awaiting Authoring*

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

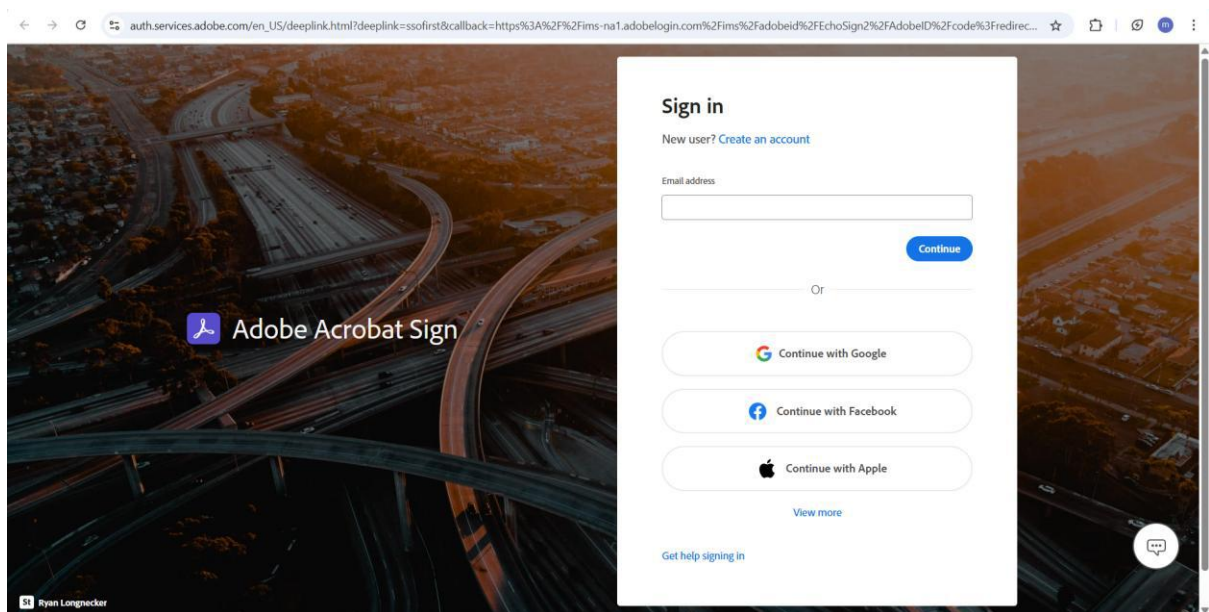


Step 30: The above step navigates you to documents section

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

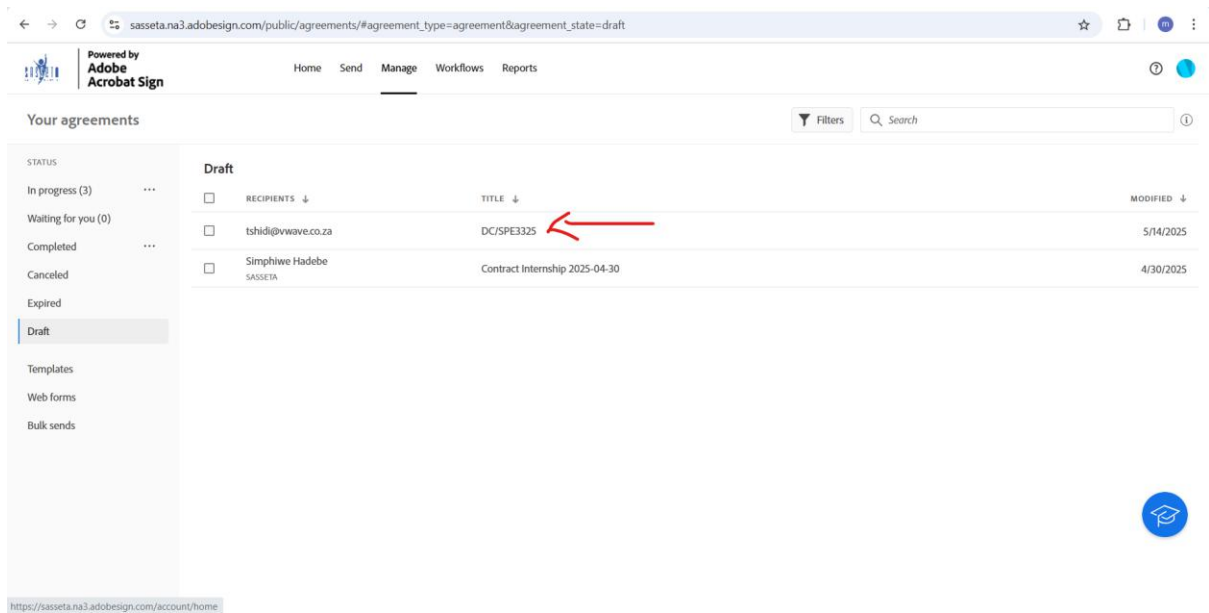


Step 32: Clicking on the link will open adobe app page, to access adobe app, you need to have a valid adobe licence

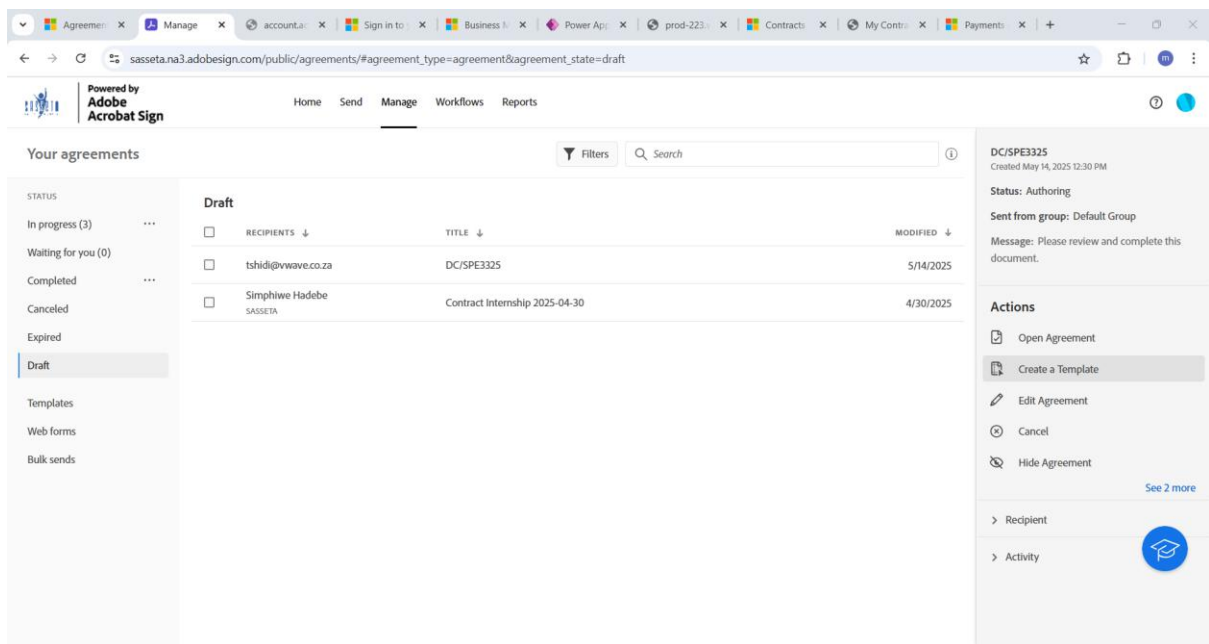


Step 33: On Login this is the page you will see

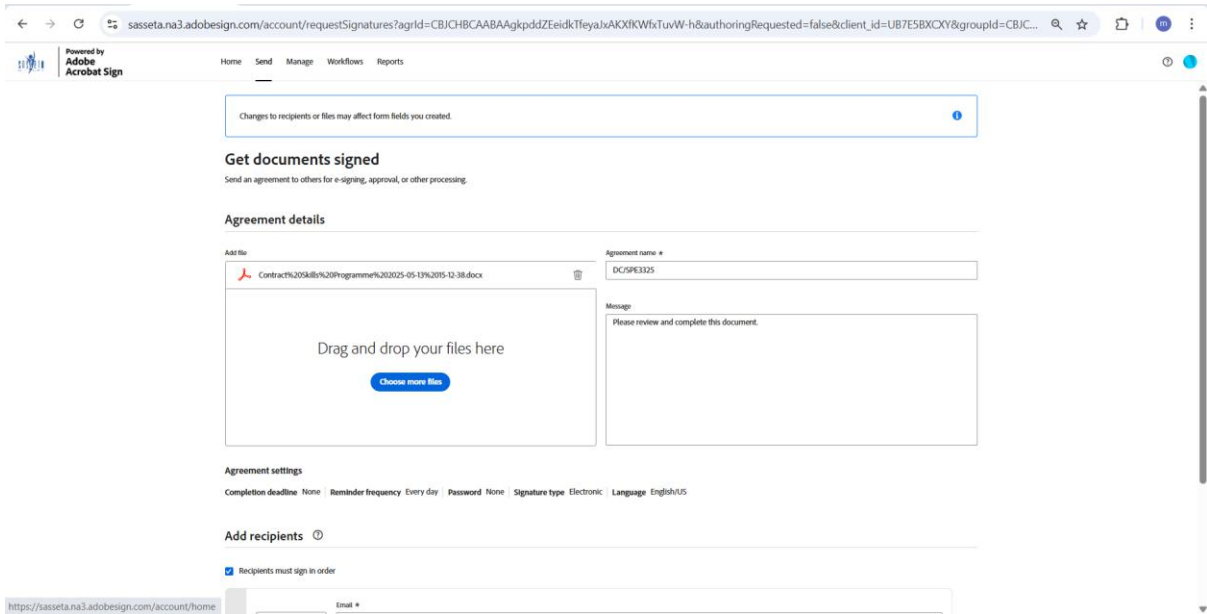
Step 34: The contract will be under on the Navigation drafts



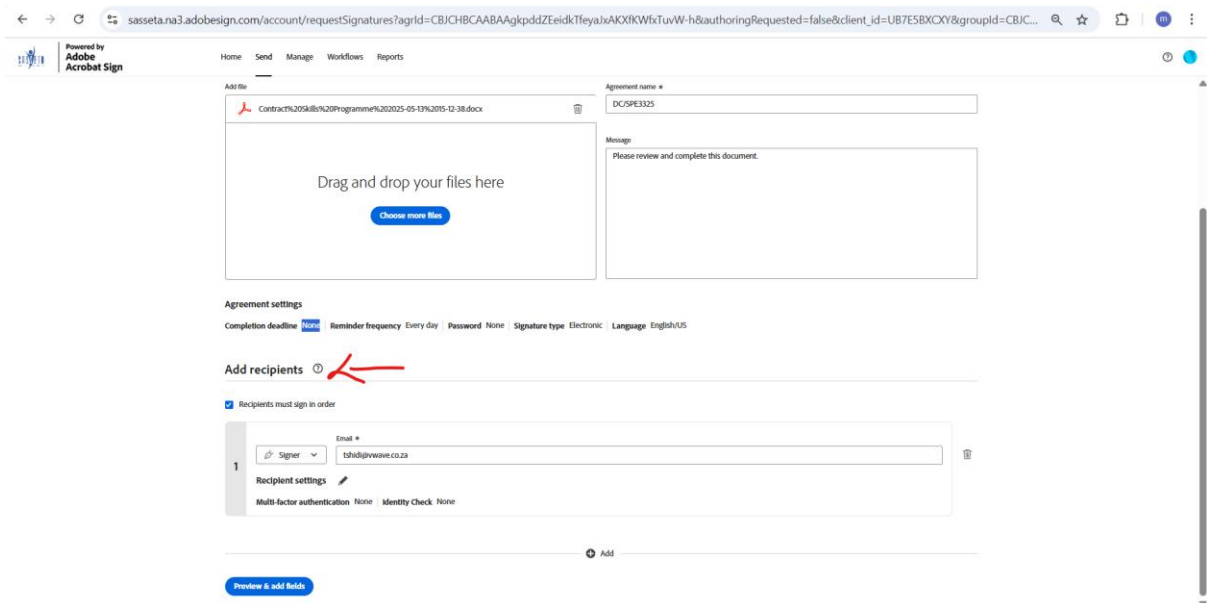
Step 35: Select the contract, click on *Edit Agreement*



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



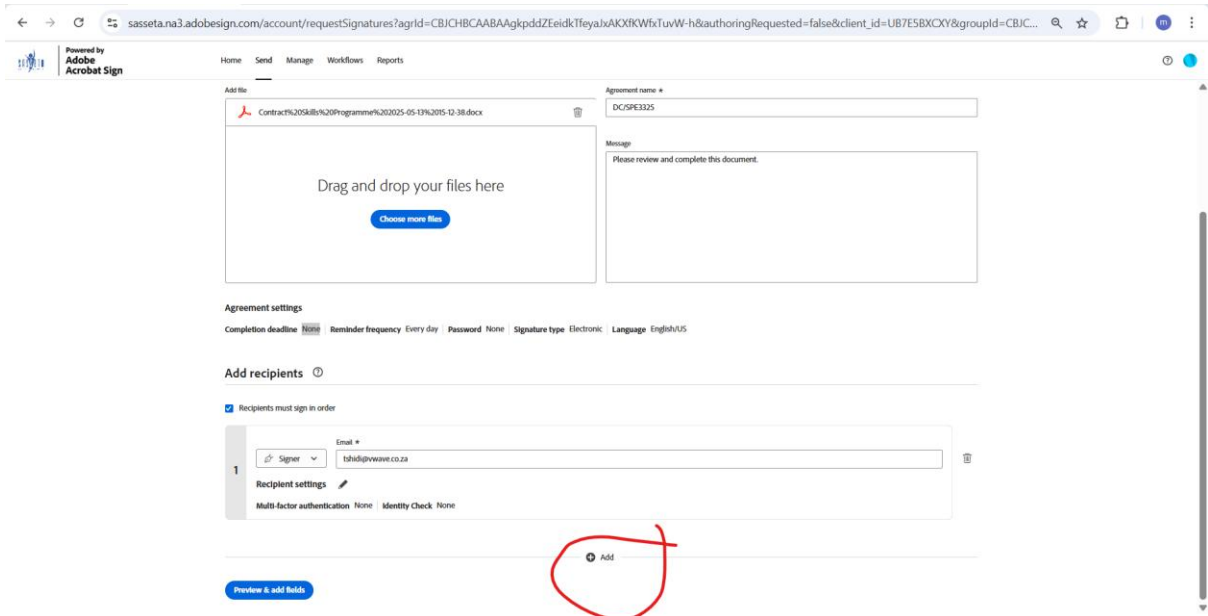
Step 37: Scroll down to the Add recipients' sections



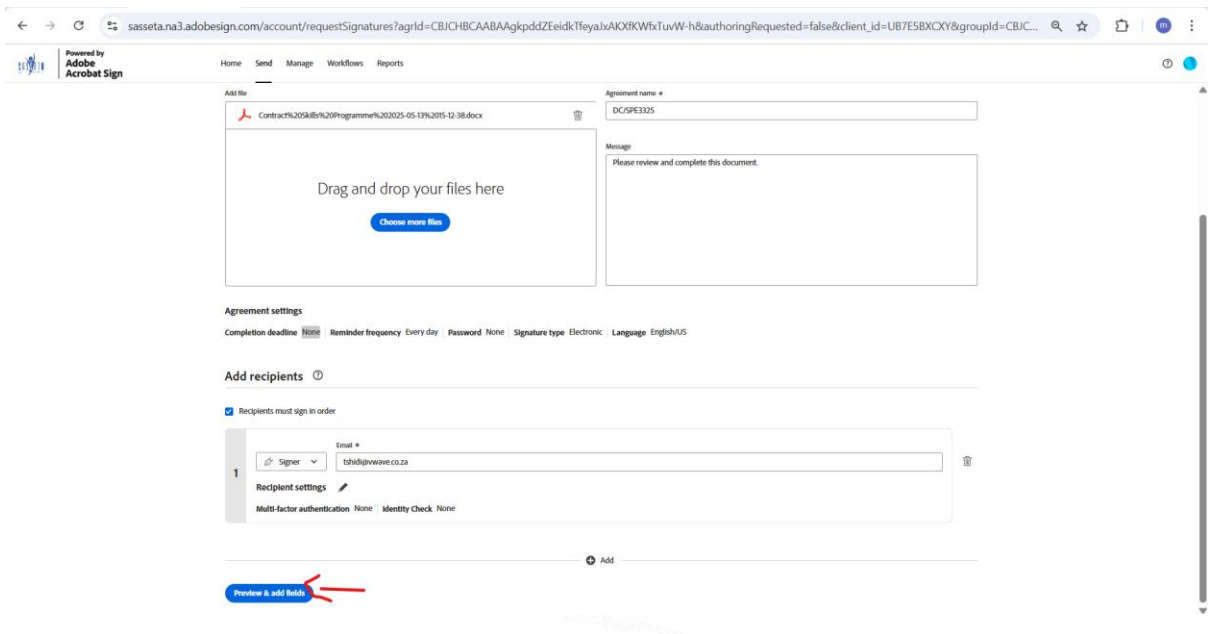
Step 38: Change the recipient's designators available options are

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

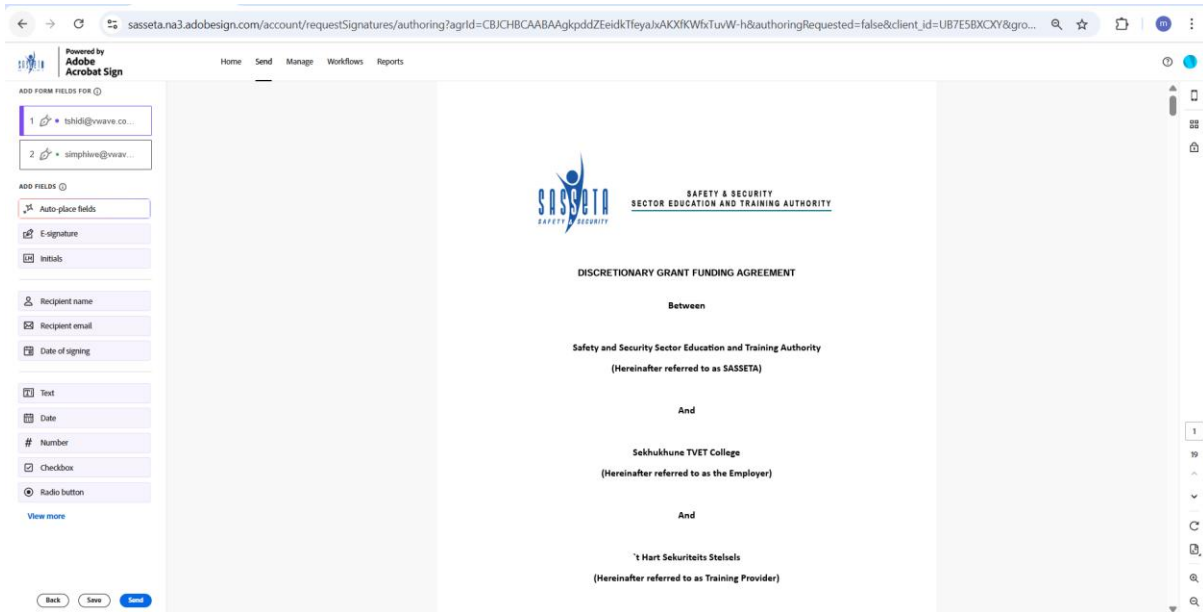
Step 39: Click on Add to for additional signatories, populate their email address, select *add individual*, specify the action in Step 38 above



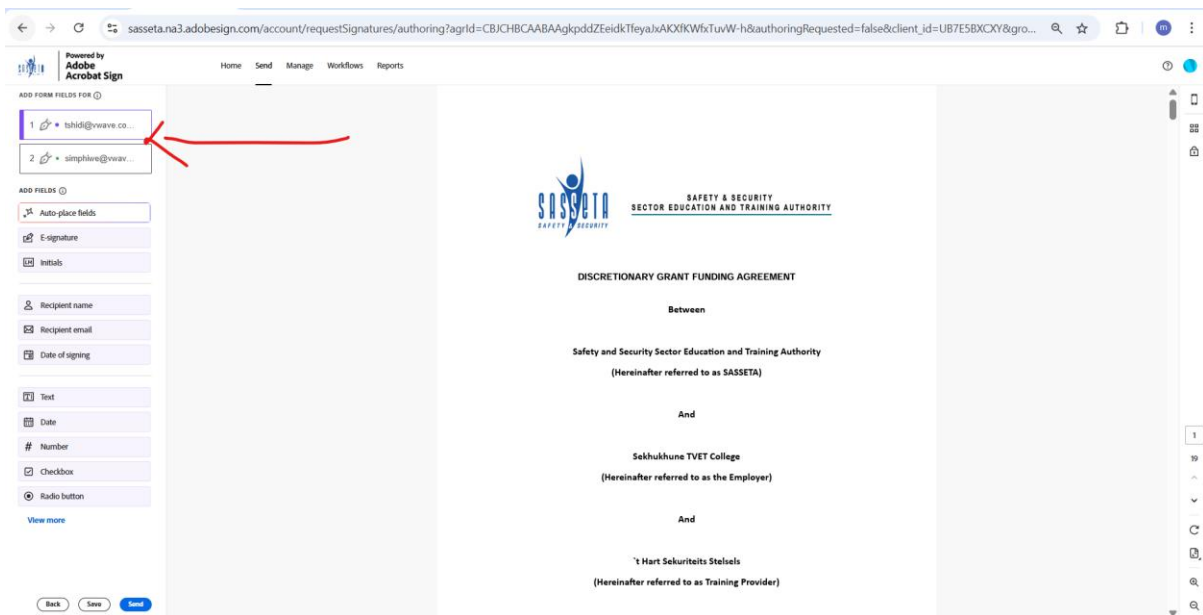
Step 40: Click on **Preview & add fields**



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



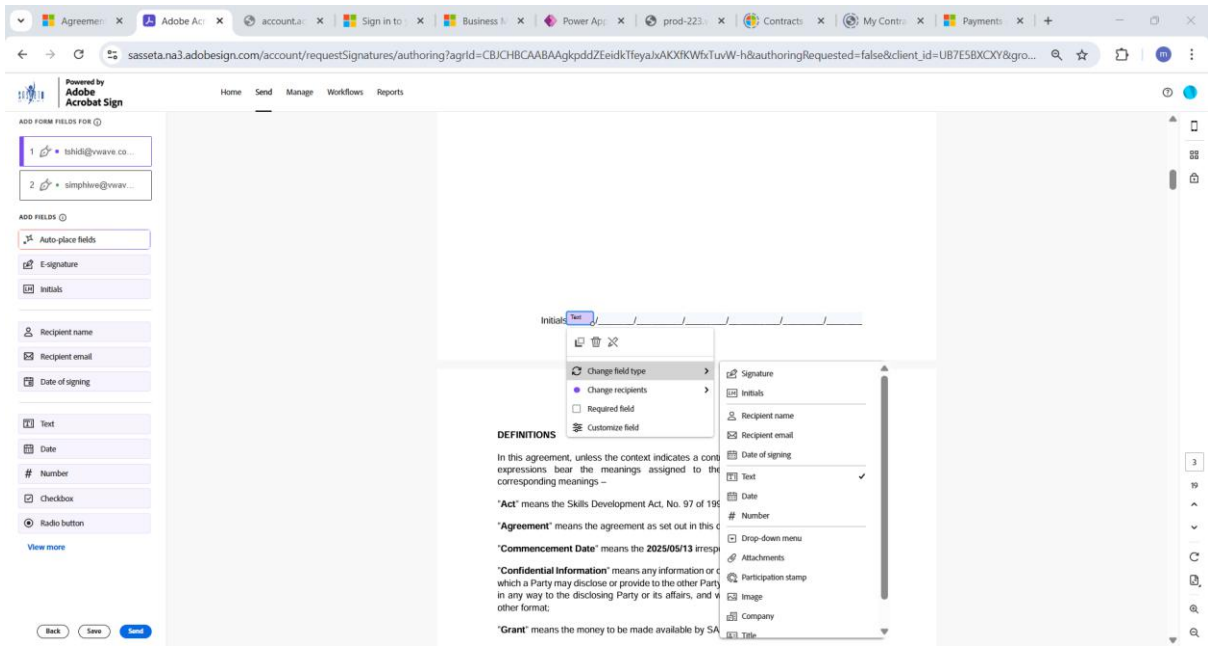
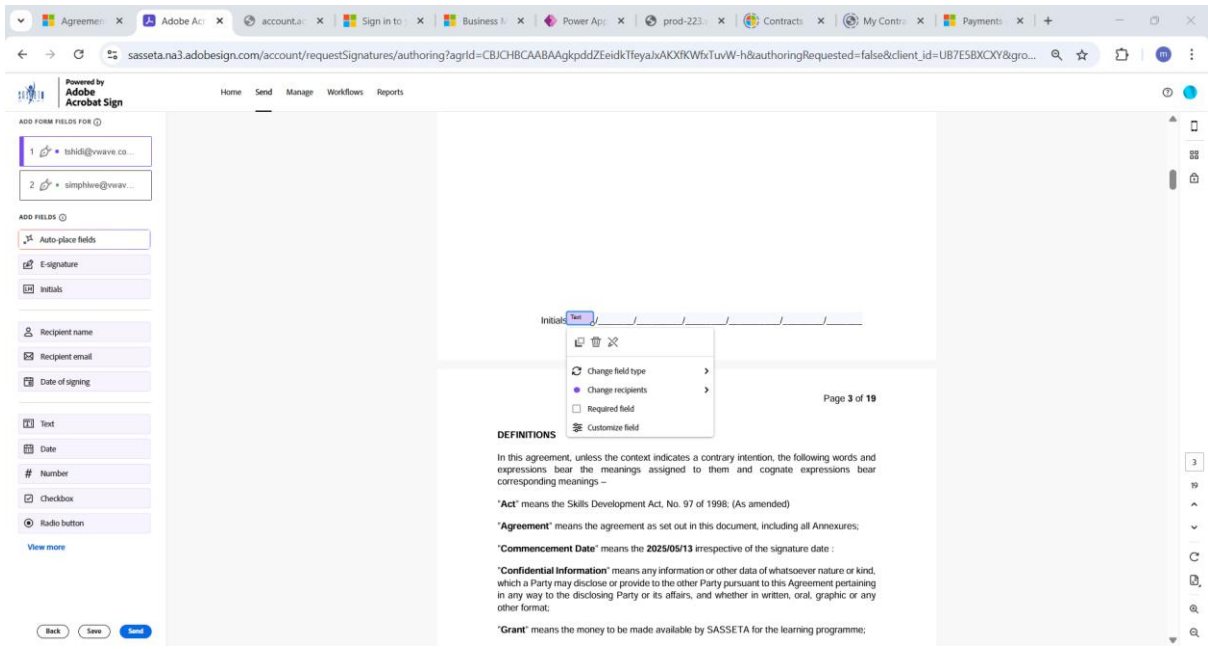
Step 42: On the left Navigation Under **ADD FORM FIELDS FOR** section is a list of all recipients colour coded



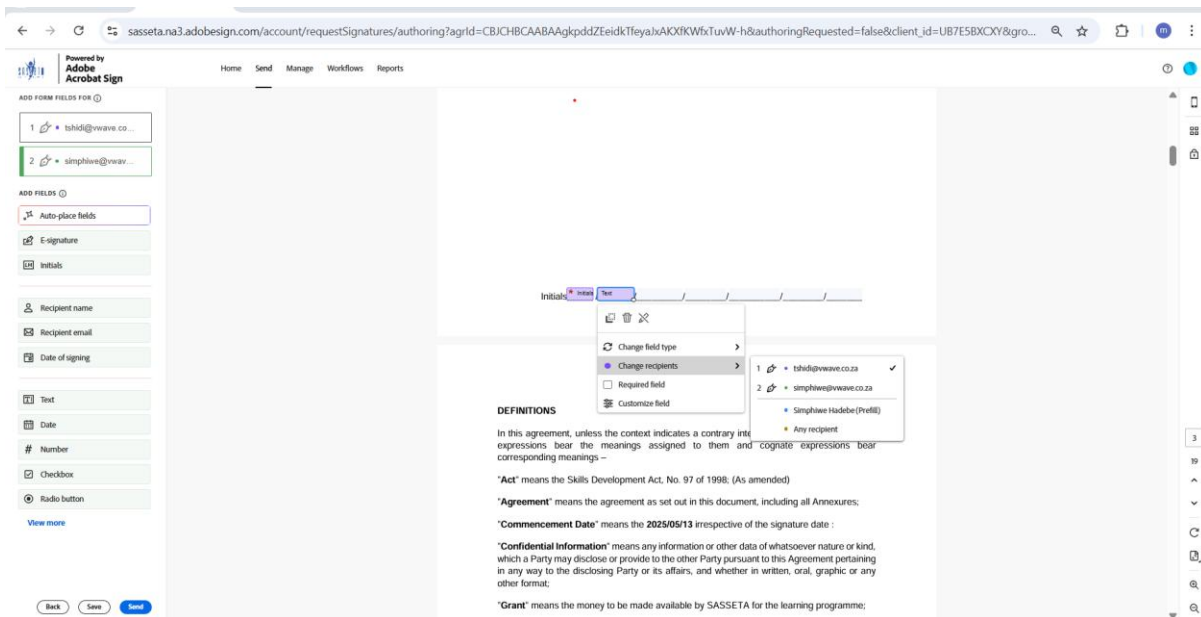
Step 43: Click on the first page that needs initials or signature, the colour represents the recipient

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

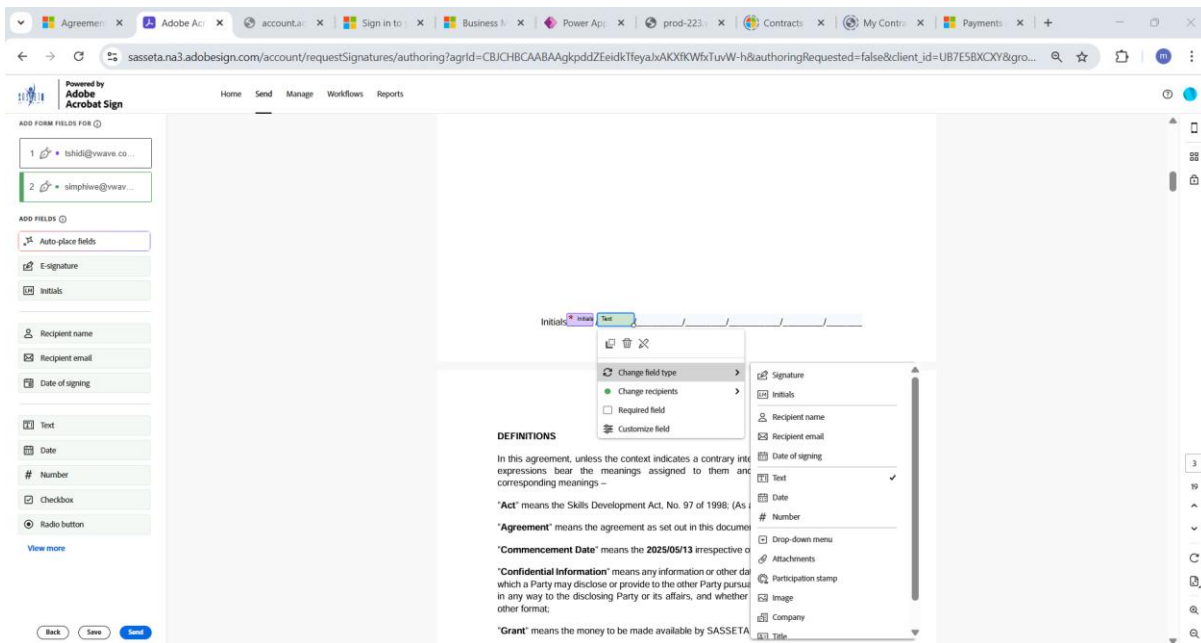
Step 45: Repeat this for all pages where you want the colour coded recipient to sign until the last page



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

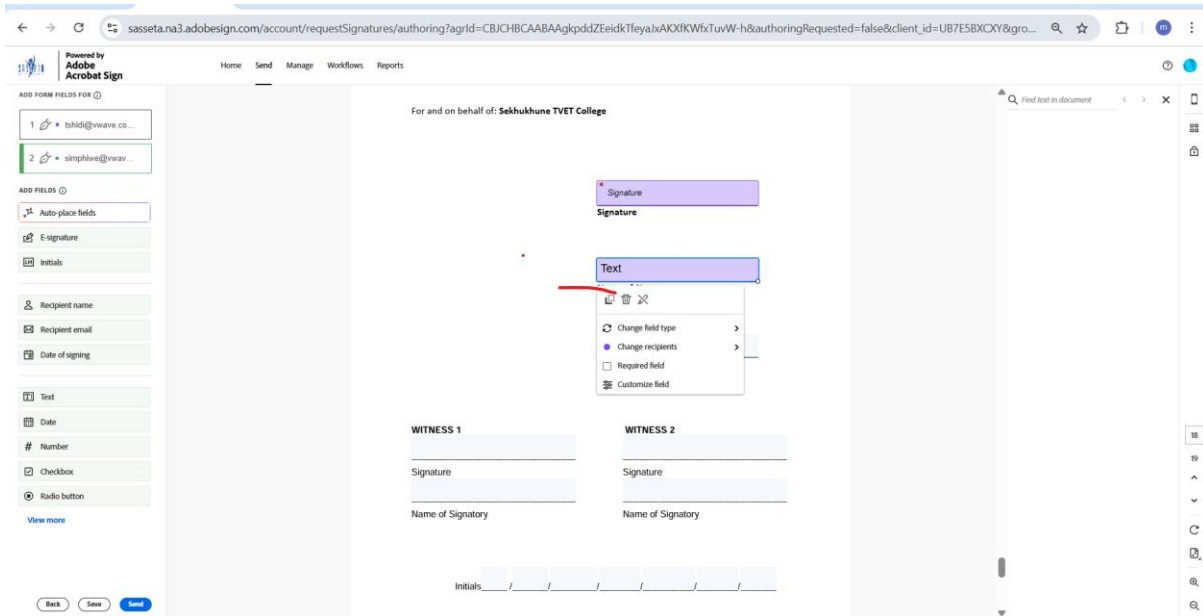


Step 47: Add the field type and ensures the selected recipient is correct, this ensures recipient validity, to sign and initials in designated places

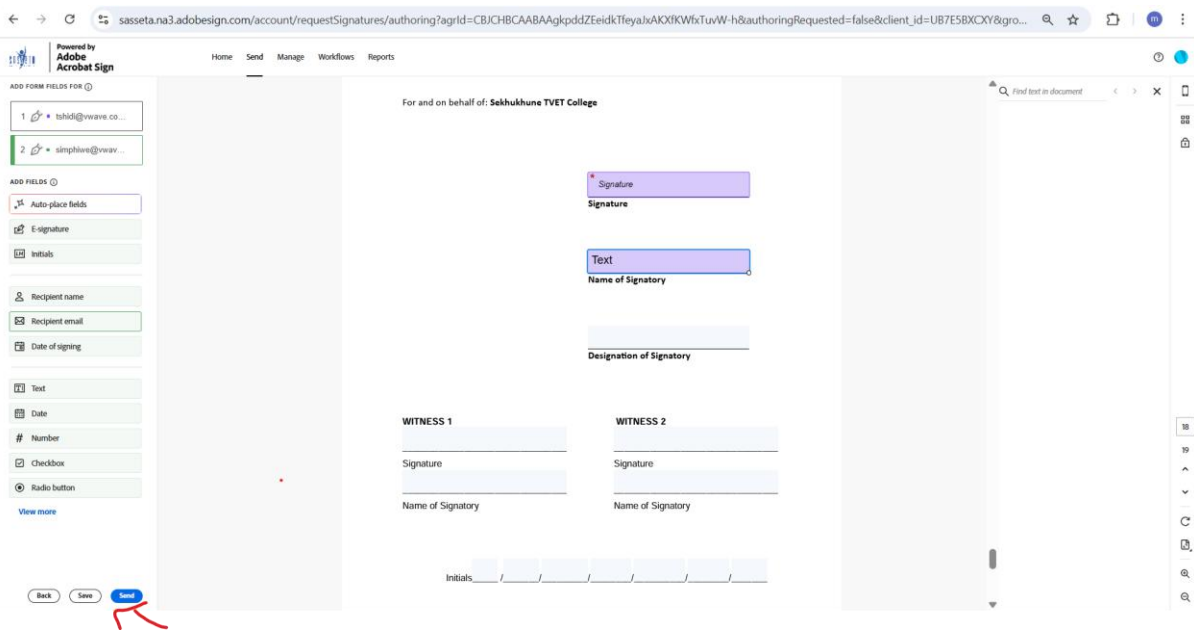


Step 48: Repeat this process for all receipts on the list

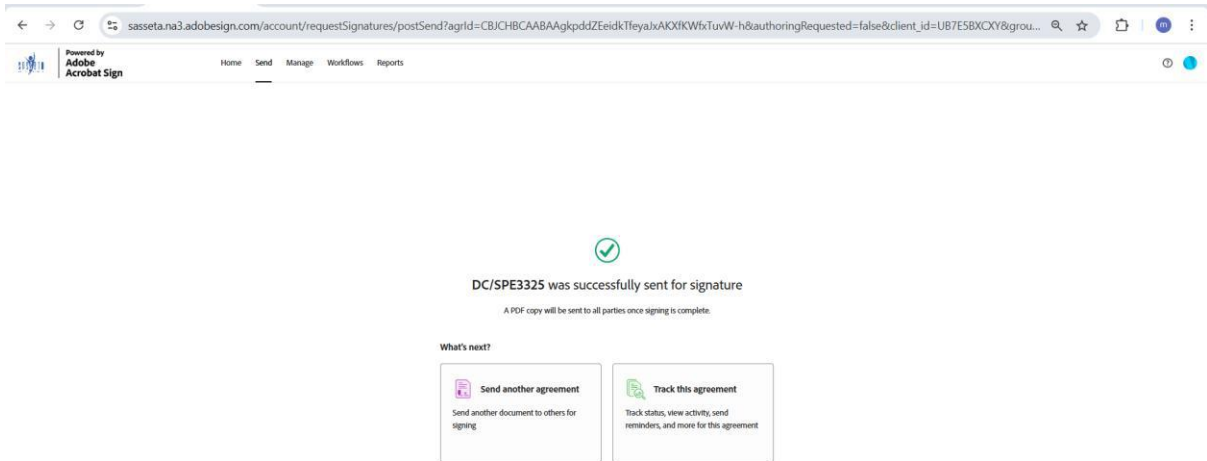
Step 49: To delete you can click on the bin sign and reconfigure or add again on the field or the next field, this deletes the current user you have selected and the field type, you can add another one or move to the next field



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

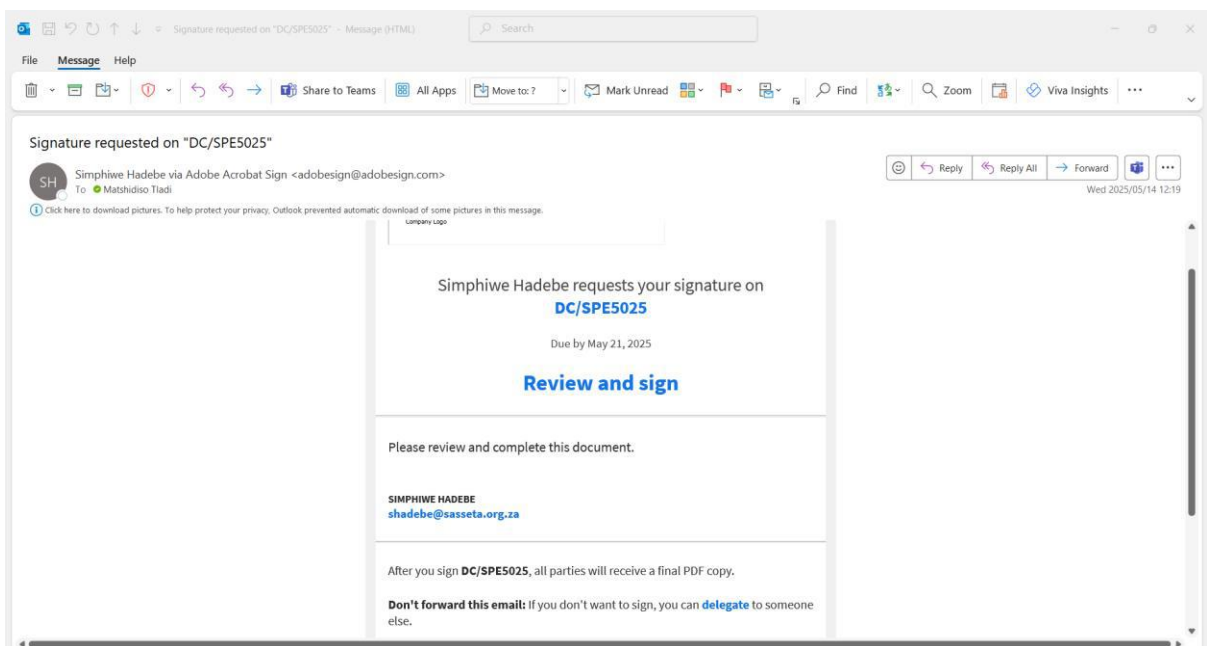


Step 51: On Completion you, the below screen will be displayed, you can close adobe page

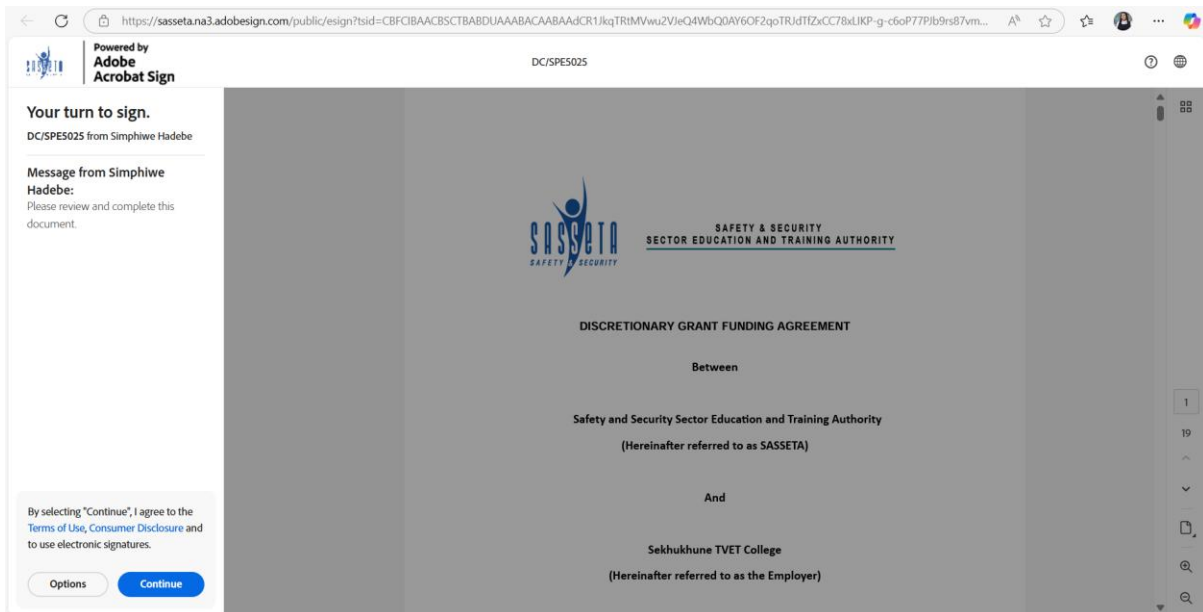


Step 52: When you Navigate to the contracts page, documents section, the agreement will change from **WAITING FOR AUTHORIZING** to **OUT FOR SIGNATURE**

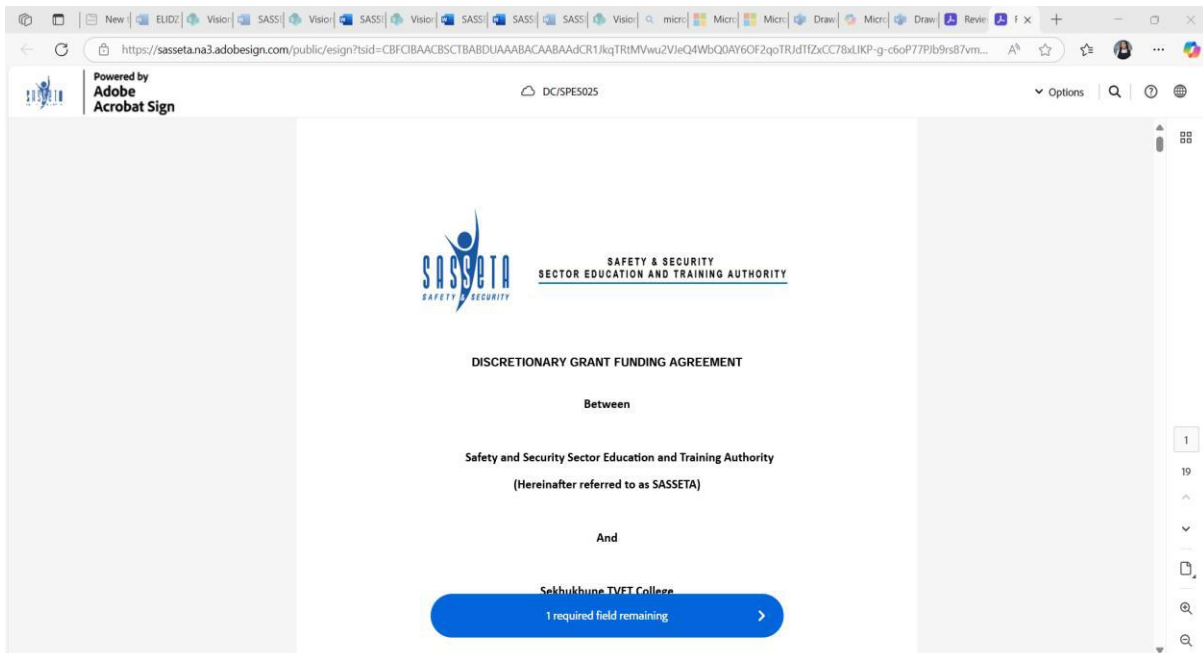
Step 53: The recipients as per specified order will receive the notification email to sign



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

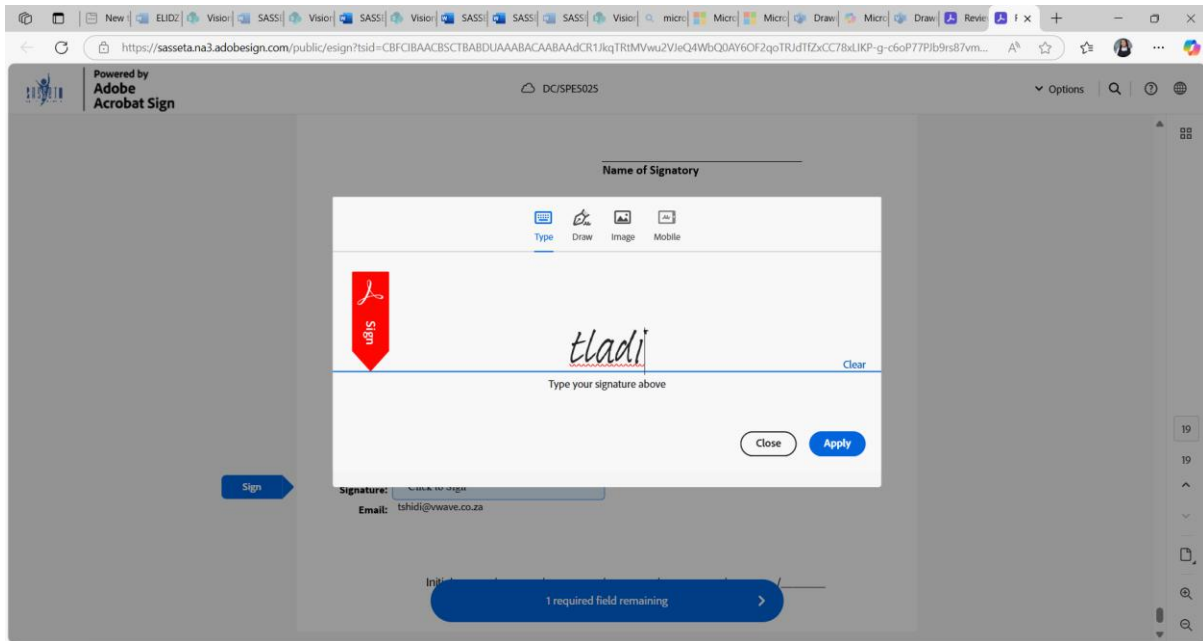


Step 55: Click on blue button at the bottom, it will guide you on need all sections to populate



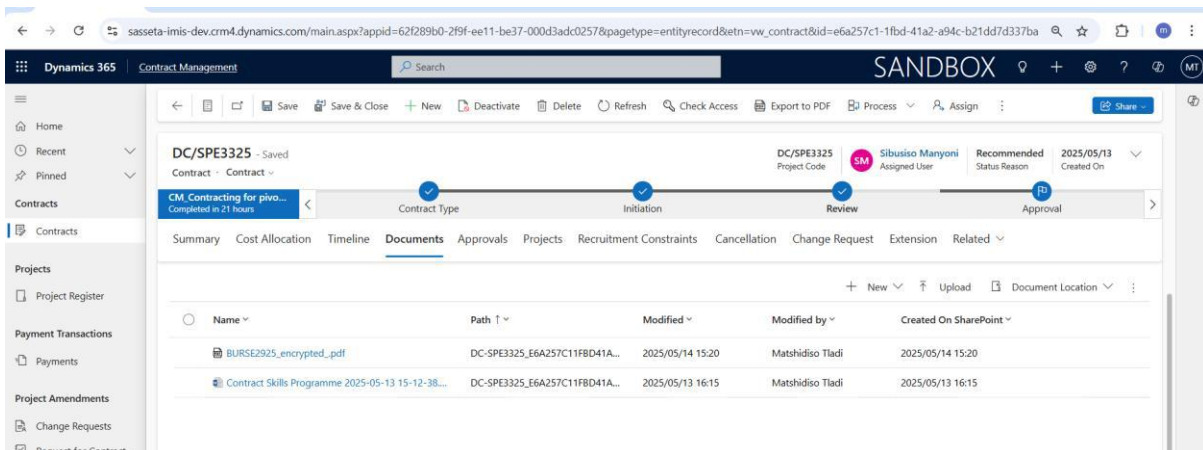
Step 55: Click on apply for changes to take effect on each field, once completed, click on submit and Sassetta page will be presented.

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 review 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

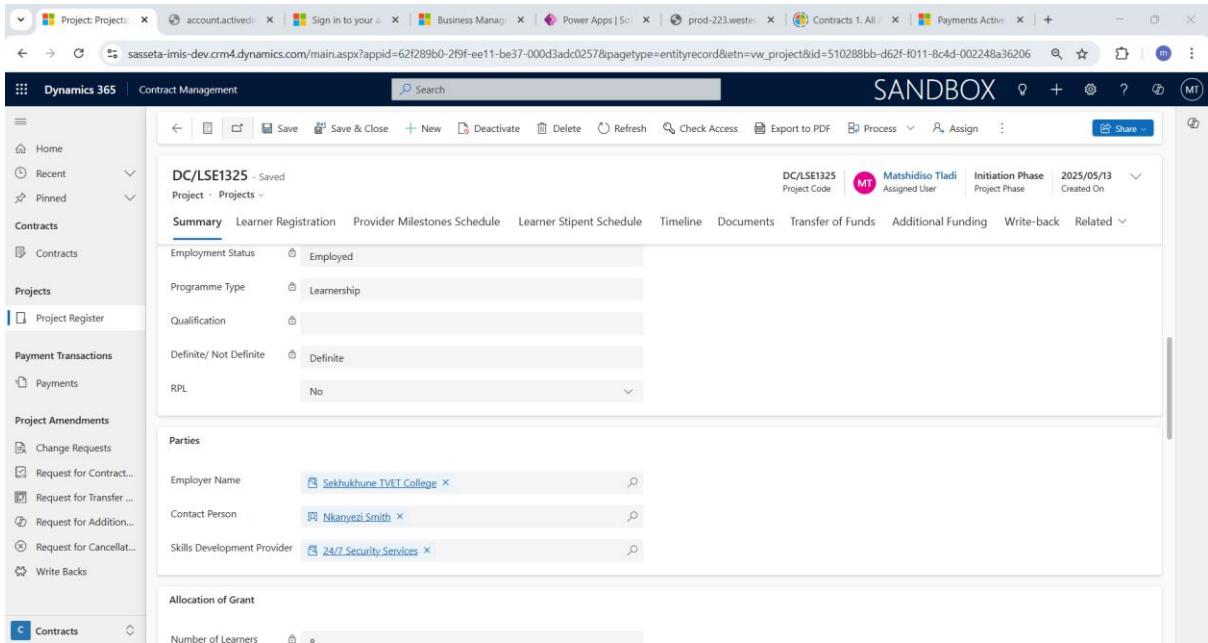
5.1.1 A PROJECT WILL BE CREATED UNDER PROJECTS .

The screenshot displays the Dynamics 365 Contract Management interface. The top navigation bar includes 'Dynamics 365' and 'Contract Management'. The main content area shows a contract record for 'DC/LSE1325' with a status of 'Approved' and a creation date of '2025/05/09'. Below this, a 'Projects' tab is active, displaying a table with the following data:

Project Code	Sponsorship	Contract Type	Definite/ Not Definite	Estimated Start Date	Finish Date	Chambers	Project Phase	Created On
DC/LSE1325	SETA Funded	Pivotal Progr...	Definite	2025/05/09	2025/12/09	Defence	Initiation Pha...	2025/05/13

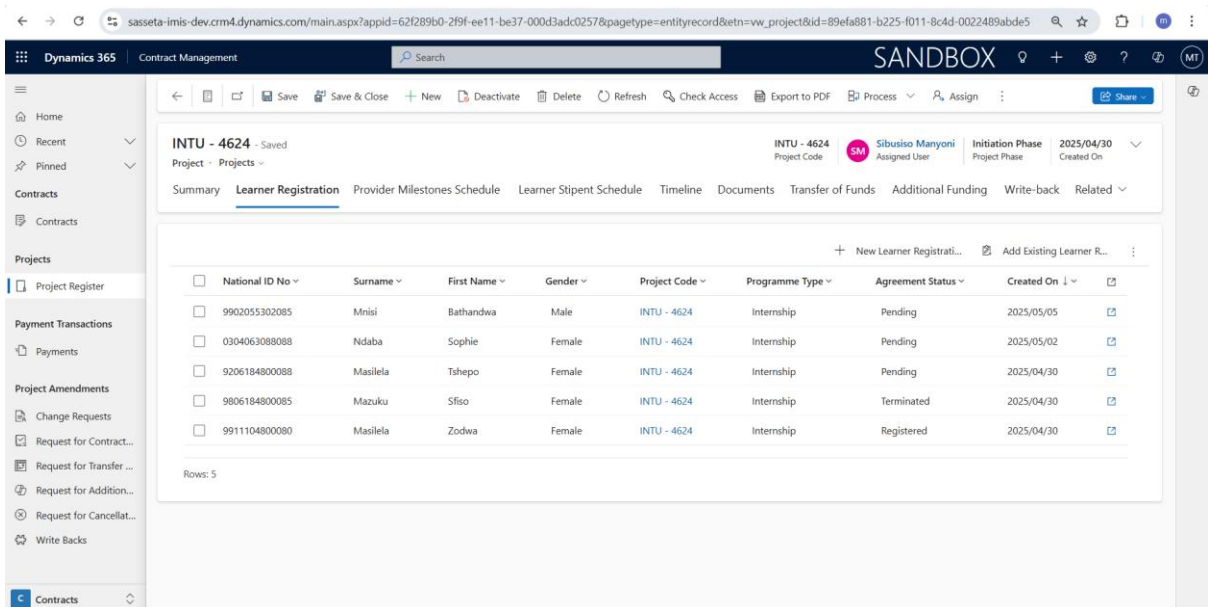
- To open the project double, click the project or open the project under project, project register, select and double click the project.

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.

The screenshot shows the Dynamics 365 interface for Contract Management. The main view is 'Disbursement Milestones' for project 'INTU - 4624'. The table lists the following milestones:

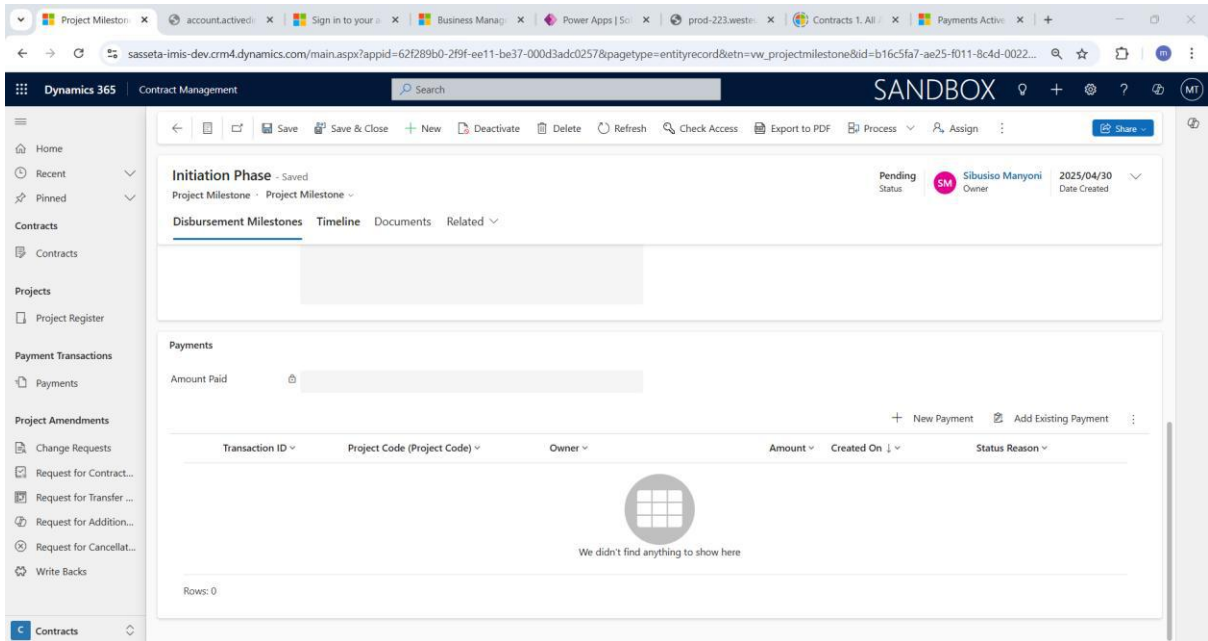
Milestone Name	Estimated Delivery Milestone Date	Payment Milestone instalment Amount	Status	Date Created
Initiation Phase	2025/06/25	R20 000.00	Pending	2025/04/30
Execution Phase 1	2025/08/21	R20 000.00	Pending	2025/04/30
Execution Phase 2	2025/10/23	R20 000.00	Pending	2025/04/30
Closure Phase	2026/01/15	R20 000.00	Pending	2025/04/30

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

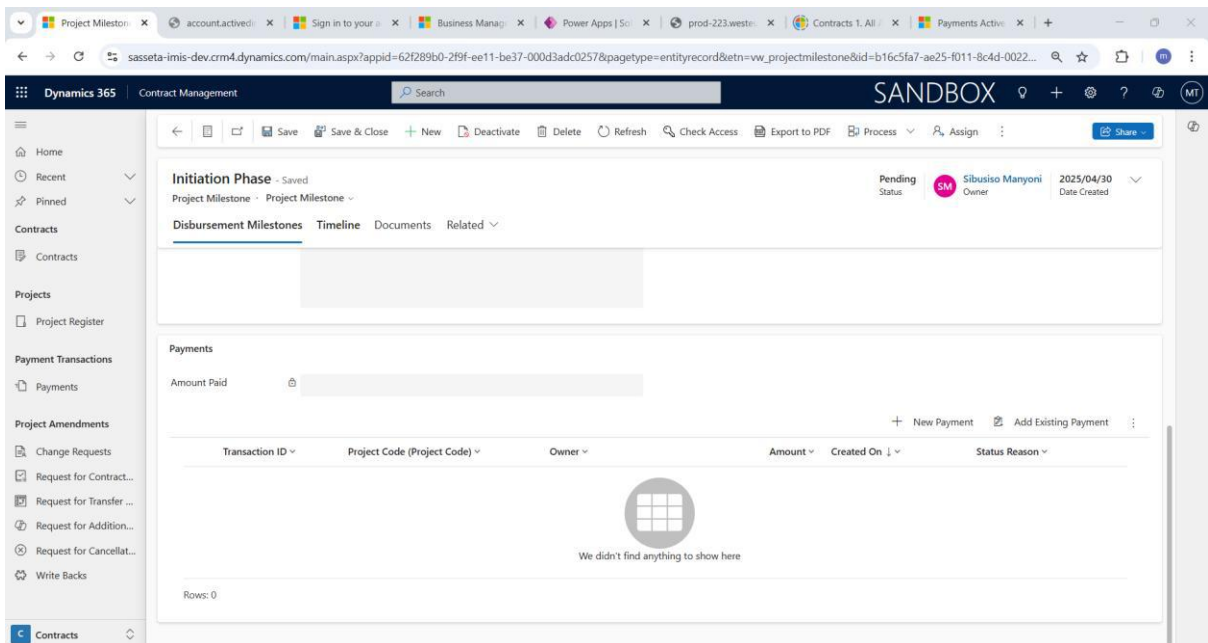
The screenshot shows the 'Initiation Phase' milestone edit form. The form fields are as follows:

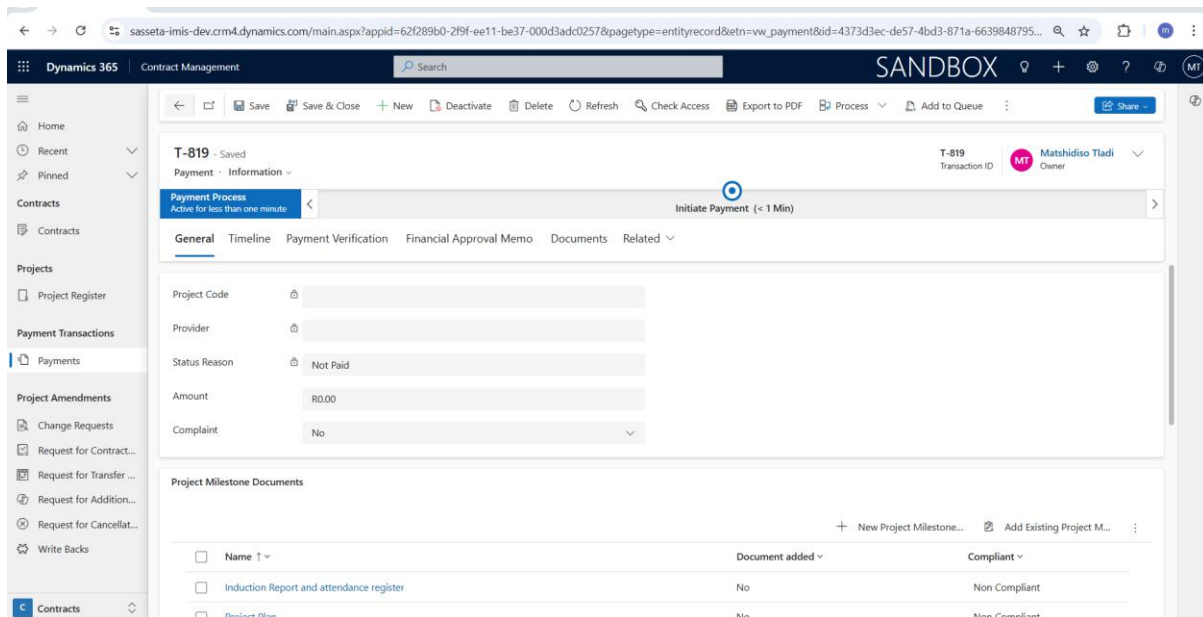
- Milestone Name:** Initiation Phase
- Estimated Delivery Milestone Date:** 2025/06/25
- Payment Milestone instalment Amount:** R20 000.00
- Outstanding Balance:** (Empty field)
- Payment Milestone Descriptions:**
 - Training Plan
 - Project Plan
 - Training Plan
 - Induction Report and attendance register

4. To add a payment request for 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 practitioner can follow 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 compliant and the payment should be on status compliant
9. Complete payment verification and financial memo section

5.1.1.5 PAYMENT PROCESSING APP – FIANANCE

1. Milestone Payment can be changed from Not paid to Paid by finance team
2. Finance team can attach Payment verification – On the Payment processing app

The screenshot shows the Dynamics 365 interface for Payment Processing. The main view is a table titled "Active Payments" with the following columns: Transaction ID, Project Code (Project Cod...), Owner, Amount, Created On, and Status Reason. The table contains 11 rows of payment data, all with a status of "Not Paid".

Transaction ID	Project Code (Project Cod...)	Owner	Amount	Created On	Status Reason
T-819	INTU - 4624	Matshidis...	R0.00	2025/05/14	Not Paid
T-818	DC/LE1325	Matshidis...	R36 000.00	2025/05/13	Not Paid
T-817	DC/LE1325	# Portals-...	R0.00	2025/05/13	Not Paid
T-816	DC/LE1325	Matshidis...	R25 000.00	2025/05/13	Not Paid
T-815	DC/LSU1725	Simphiwe ...	R35 000.00	2025/05/04	Not Paid
T-814	DC/LSU1725	Simphiwe ...	R35 000.00	2025/05/04	Not Paid
T-813	DC/INTU4926	Matshidis...	R144 000.00	2025/04/25	Not Paid
T-812	DC/LE4825	IMIS Admin	R0.00	2025/04/24	Not Paid
T-811	DC/LSU7125	IMIS Admin	R0.00	2025/04/24	Not Paid

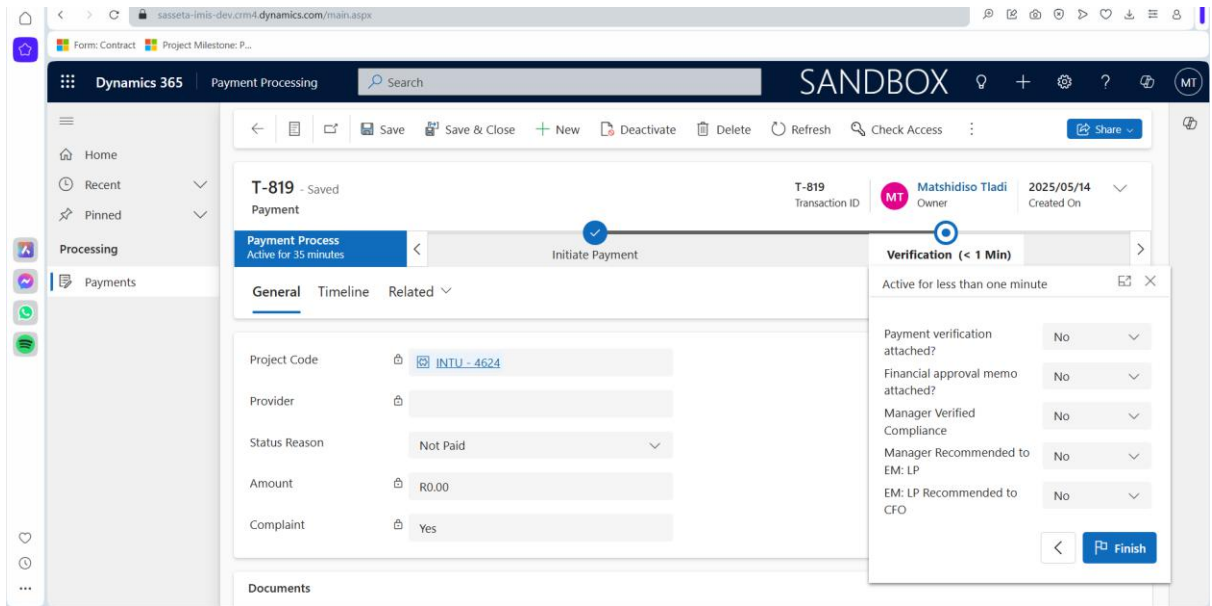
3. The above view is for the finance team, finance personnel will follow the business process stage to complete payment request

The screenshot shows the Dynamics 365 interface for the "Initiate Payment" process. The main view is a form titled "T-819 - Saved Payment" with a "Payment Process" stage active for 32 minutes. The form contains the following fields:

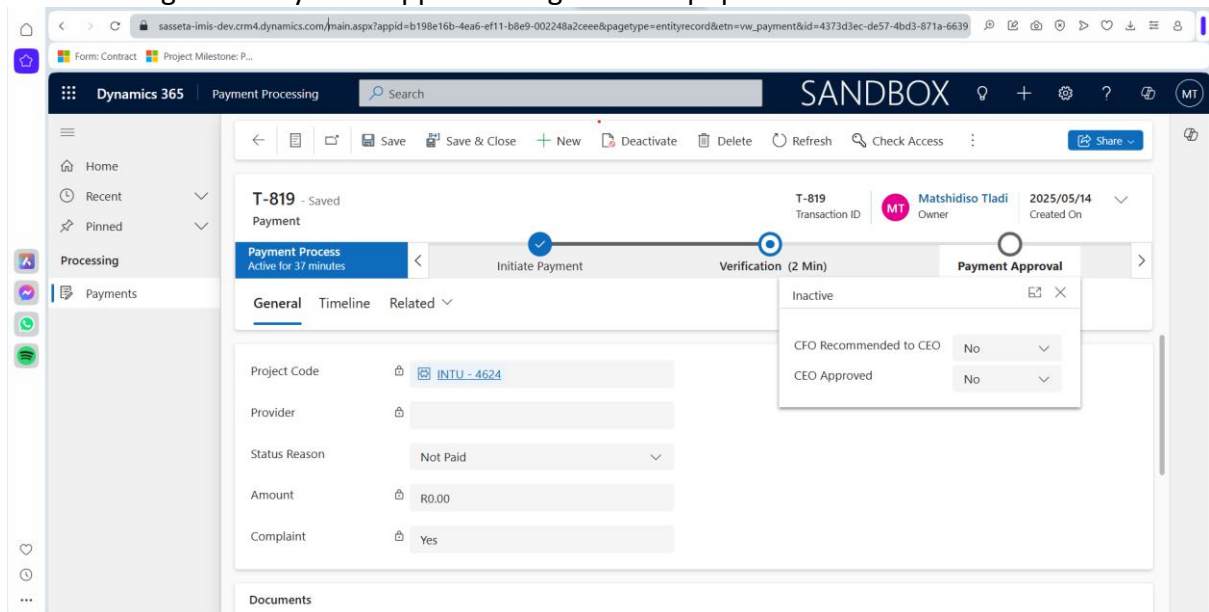
- Project Code: INTU - 4624
- Provider: [Empty]
- Status Reason: Not Paid
- Amount: R0.00
- Complaint: Yes

There is a "Finish" button at the bottom right of the form. A "Documents" section is visible at the bottom of the page.

4. After verification finance can click on yes for all initial 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.

Name	Number of Months	Payment Date	Amount	Create Stipend Payment Request	Payment Status
Stipend Disbursement Schedule 1	1	2025/05/31	R35 000.00	Yes	Pending
Stipend Disbursement Schedule 2	1	2025/06/30	R35 000.00	Yes	Pending
Stipend Disbursement Schedule 3	1	2025/07/31	R35 000.00	No	
Stipend Disbursement Schedule 4	1	2025/08/31	R35 000.00	No	
Stipend Disbursement Schedule 5	1	2025/09/30	R35 000.00	No	
Stipend Disbursement Schedule 6	1	2025/10/31	R35 000.00	No	
Stipend Disbursement Schedule 7	1	2025/11/30	R35 000.00	No	
Stipend Disbursement Schedule 8	1	2025/12/31	R35 000.00	No	
Stipend Disbursement Schedule 9	1	2026/01/31	R35 000.00	No	
Stipend Disbursement Schedule 10	1	2026/02/28	R35 000.00	No	
Stipend Disbursement Schedule 11	1	2026/03/31	R35 000.00	No	

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

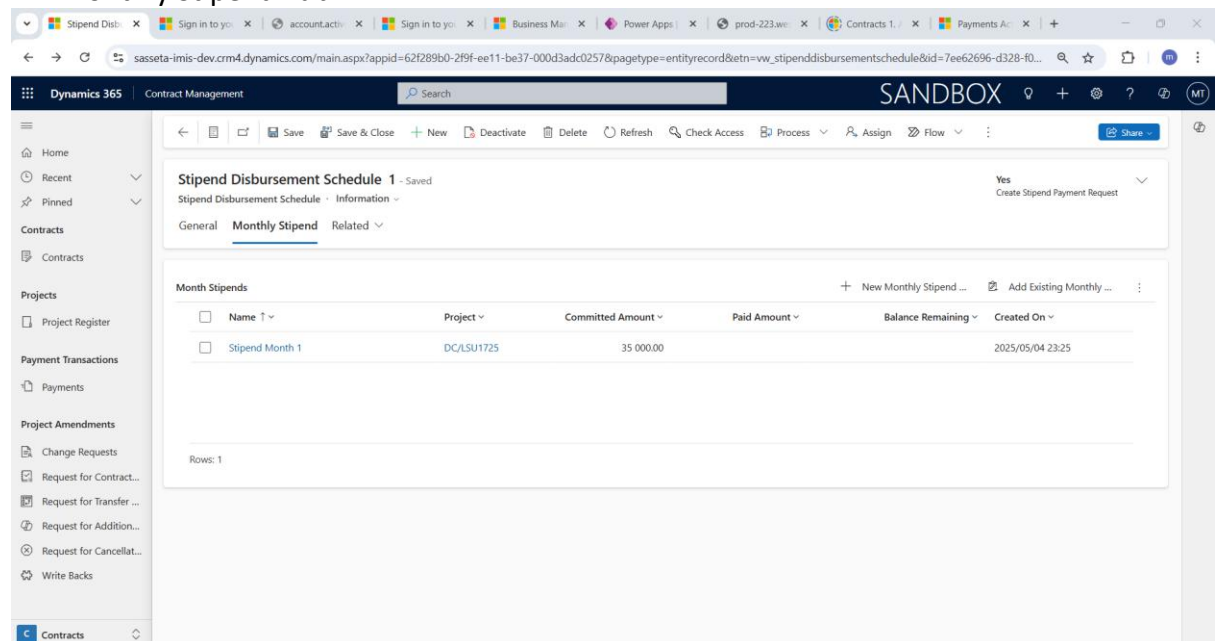
Note: This has already been defined on contract record.

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.

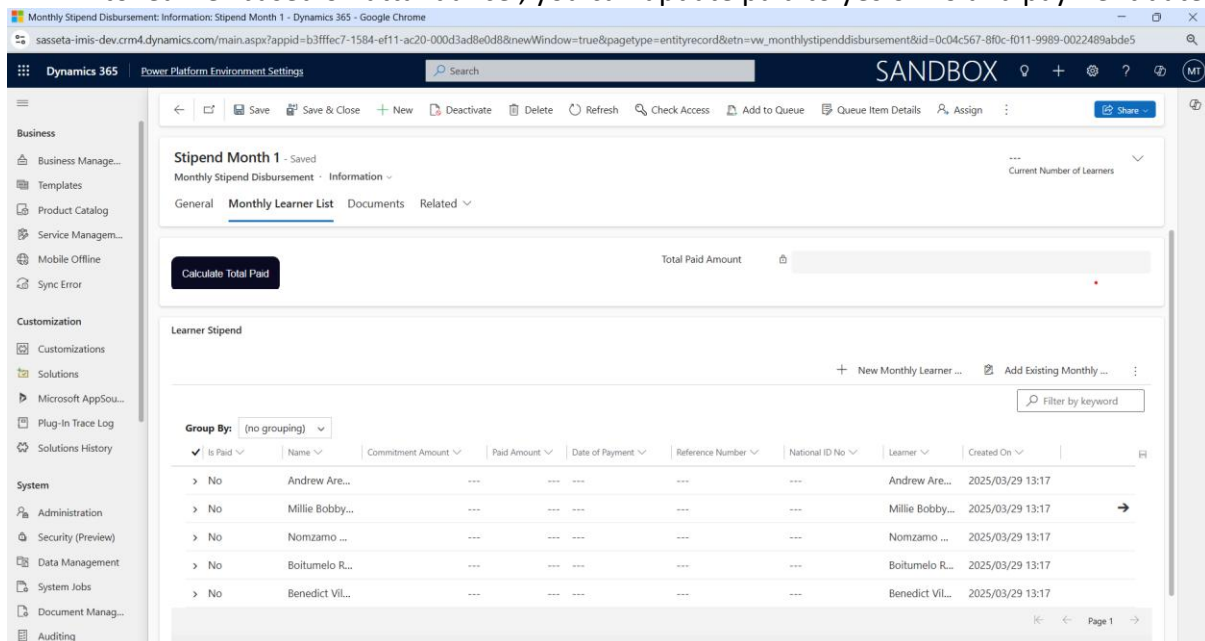
Transaction ID	Project Code	Name (Stipend Disbursement Schedule)	Provider	Amount	Status Reason
T-814	DC/LSU1725	Stipend Disbursement Schedule 1	Sekhukhune TVET ...	R35 000.00	Not Paid

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

6. To proceed 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 Learner payments based on uploaded attendance register click on Monthly Stipend Tab

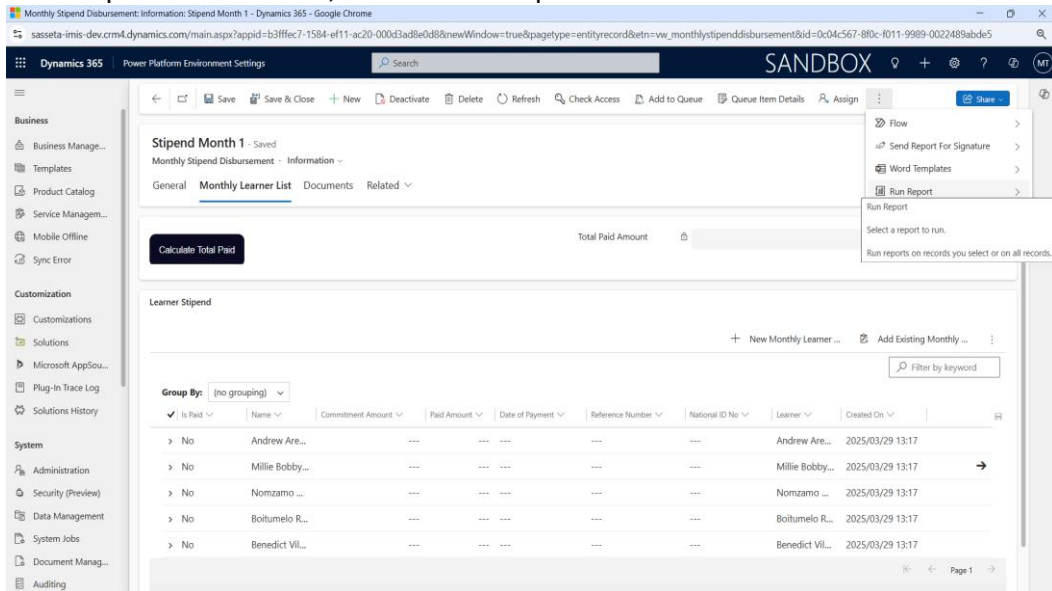


8. Open Stipend Monthly record
9. Navigate to Monthly Learner List record
10. Registered Learners will be displayed under Learner Stipend
11. The practitioners can click on learner and update this, commitment amount is the amount that was agreed for each learner on the project, Paid amount is what is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

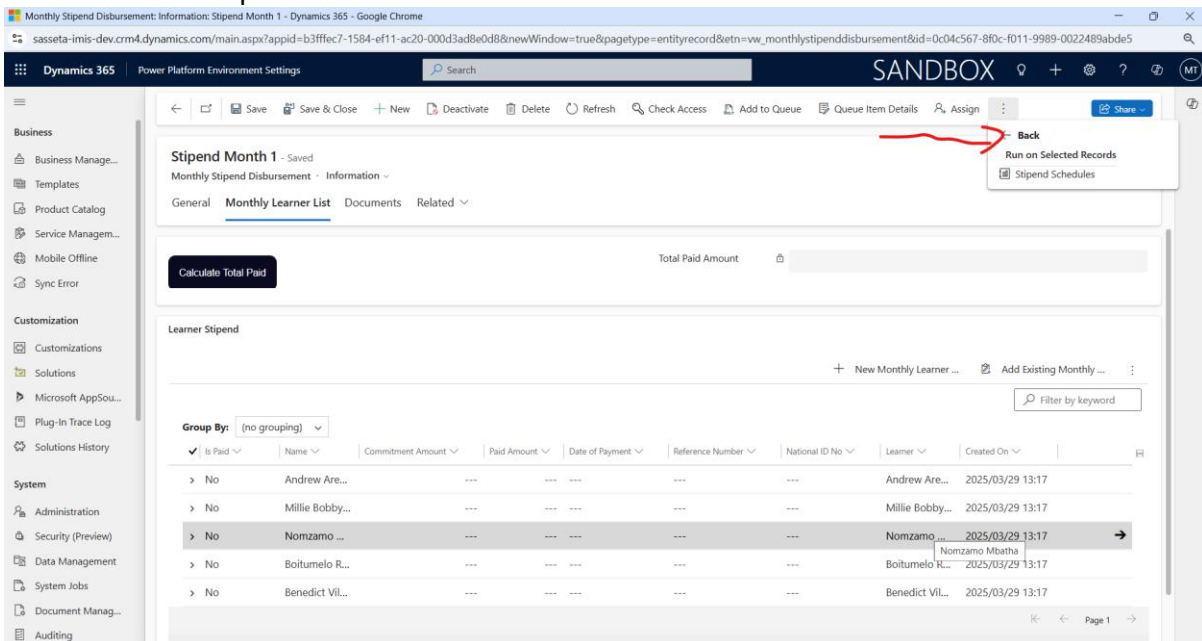


12. On Completion of the update click on **Calculate Paid Total**, to update the total paid.
13. This total will be displayed on the stipend and the outstanding balance.

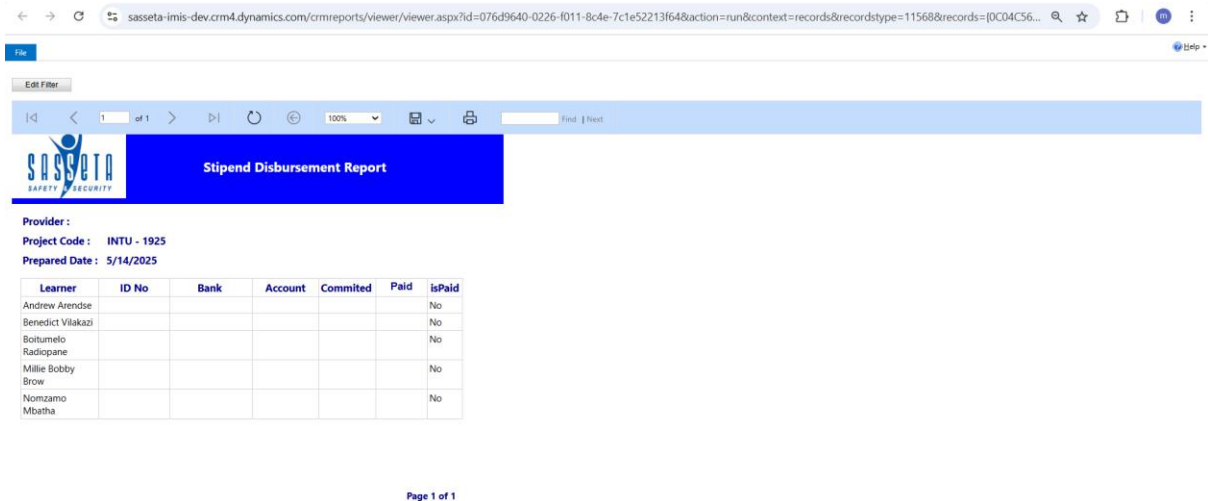
14. The outstanding balance will be rolled up to stipend schedule for all the monthlies belonging to that Stipend Disbursement Schedule
15. The Practitioner needs to make note of the commitment amount and the payment amount on the stipend schedule, the remaining balance should be rolled off to the next 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.



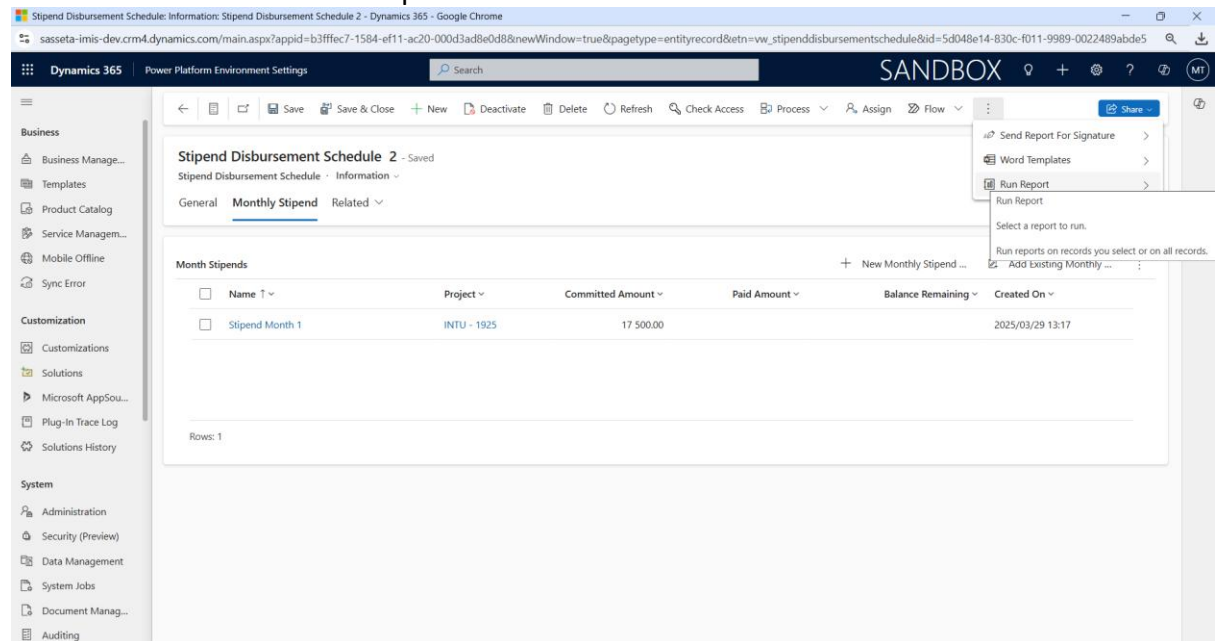
17. Click on stipend Schedules on the Run on Selected Records



18. This will open a new page for the report



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

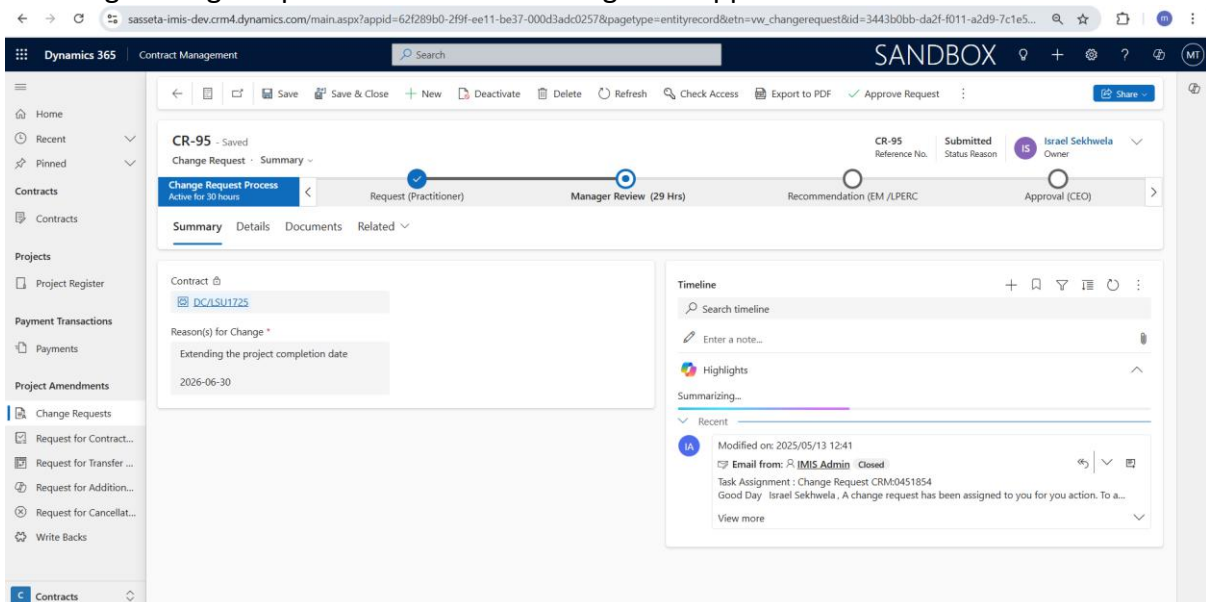


22. Click on Stipend Disbursement Summary
23. This will open a new page to run the report follow step 19 above to download the report
24. Repeat this process from 1 above for each new Stipend Disbursement Schedule

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*.

Browser: sasset-imis-dev.crm4.dynamics.com/main.aspx?appid=62f289b0-2f9f-ee11-be37-000d3ad0257&pagetype=entityrecord&etn=vw_changerequest&id=3443b0bb-da2f-f011-a2d9-7c1e5...

Dynamics 365 | Contract Management | SANDBOX

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

PURPOSE

Purpose

BACKGROUND

Background

Manager Review (30 Hrs) Modal:

- Active for 30 hours
- Review Completed: Yes
- Manager reviews date: 2025/05/13
- Next Stage

Browser: sasset-imis-dev.crm4.dynamics.com/main.aspx?appid=62f289b0-2f9f-ee11-be37-000d3ad0257&pagetype=entityrecord&etn=vw_changerequest&id=3443b0bb-da2f-f011-a2d9-7c1e5...

Dynamics 365 | Contract Management | SANDBOX

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

PURPOSE

Purpose

BACKGROUND

Background

Recommendation (EM /LPERC) Modal:

- Inactive
- Recommendation: Recommended
- Date Recommended: 2025/05/13