Once the **Contract Repository** functionality has been enabled in your entity, there are few steps the ESM System Administrator will need to follow in order to grant access to users.

The Sys Admin is able to:

➢ Set the Contract Number Prefix and the Starting Number Contract[JF1].

- Go to Admin > Select Function > General Settings > Edit Entity Settings

Tip: *These fields are not required. However, if a starting contract number is not specified the user will need to enter a contract number each time a contract is created.*

Contract Number
Prefix: 001
Starting Contract
Number: 2020

➢ Determine the Contract Types

- Select Function > General Settings > Contract Type

contract type

Contract Type: [ ]

Sequence in Contracts - General Details (drag and drop):

Standard edit
Fixed Price edit
Time & Materials edit
Purchase Order edit

- To create a new contract type, type the name in the field, click update.

- Fields are modifiable and can change the sort order with a drag and drop action.

➢ Enable **Contract Repository** privileges on the user's profile:

- Select Function > add/edit user – Search for the user's name > Click Go

▾ESM Purchase

Menu / Cart / Checkout

Menu Options: ✔ Order Summary
✔ Order Summary Edit
✔ Reporting
✔ Admin

Privileges: ☐ Transfer Originator's Cart
☐ Edit Cart Transferred To
✔ Checkout tab
☐ View SSN

Cart Transferred To:

* Payment
Forms Permitted: ✔ Credit Card ✔ PO

Change Order

Privileges: ✔ Change Order

Approval Process: ◉ Request Change
○ Direct Release

Change Order Filter: ○ Entity Wide
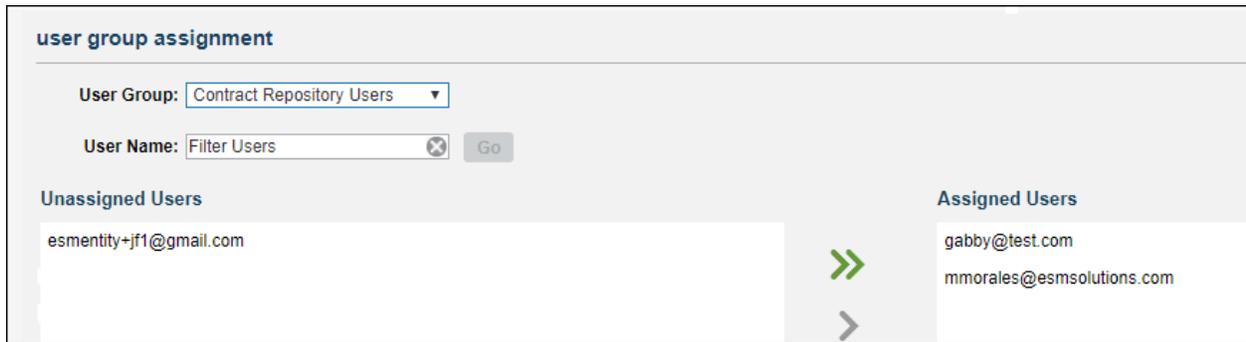◉ User Specific

Contract Management

Privileges: ✔ View Contract ←
✔ Approve

➢ Create a new user group[JF2] for the **Contract Repository** users:
  • Select Function > User Group Management > Add/Edit User Group
  • To create a new user group, type the name in the field, click Go and then select Add New.
   *Tip: Contract visibility can be limited by group since there is one group associated with each contract. Consider creating many groups as needed for different roles or types of contracts.*
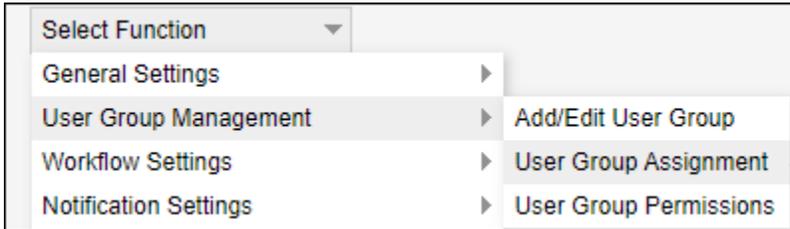
➢ Assign users with the **Contract Repository** privileges to the newly created user group
  • Select Function > User Group Management > User Group Assignment
  • Select the user group from the drop down and assign the users.
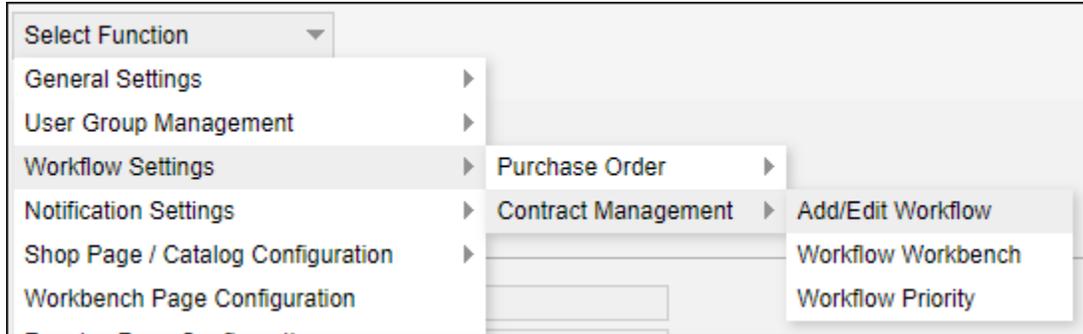

➢ Assign User Group Permissions to the **Contract Repository** user group
  • Select Function > User Group Management > User Group Permissions
  • Select the User Group from the drop down
  • Assign access to users to be able to create/edit only their contracts or to create/edit all contracts for users in their group.
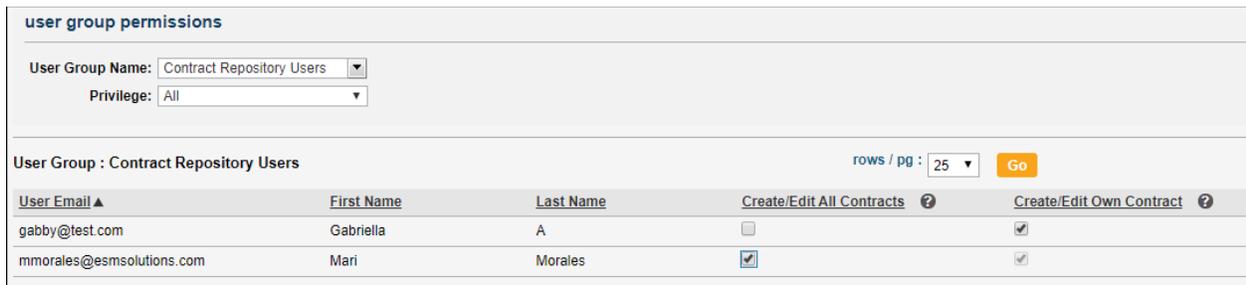
➢ Create a Workflow for Contracts.
  • Select Function > Workflow Settings > Contract Management > Add/Edit Workflow

- Contract Management workflows allow you to select a user or a user group to be the approver.
    - Only users who are marked as Contract approvers can be added
    - If selecting a User Group, then all of the contract approve users in the group are treated as an 'OR'.

Select Function ▼		
General Settings	▶	
User Group Management	▶	
Workflow Settings	▶	Purchase Order ▶
Notification Settings	▶	Contract Management ▶	Add/Edit Workflow
Shop Page / Catalog Configuration	▶		Workflow Workbench
Workbench Page Configuration			Workflow Priority

When all the above has been completed, the user will see a Contracts Tab when logging in:

Shop ⌄   Approve (0) ⌄   Receive   Contract