I-CONTRACKS USER GUIDE

I-ConTrackS is a Microsoft Cloud-Based AI powered interlinked application suite made to address the common organizational *pain points associated with manual contract management processes*.

We highlight just a few general pain points I-ConTrackS addresses below:

Pain Point 1 - Tracking Progress

• Difficulty in tracking contract status

Pain Point 2 – Unique Agreement Number & Version Control

• Challenges in managing multiple versions of a contract

Pain Point 3 - Invisibility

• Contracts becoming "invisible" or forgotten

Pain Point 4 - Compliance Tracking

• Difficulty in ensuring compliance with contract terms

Pain Point 5 - Data Extraction

• Manual extraction of data from contracts

Pain Point 6 - Approval Workflows

Manual approval processes

Pain point 7 – Delegation of Authority

• Confusion or authority uncertainty in the approval sequence

Pain Point 9 - Contract history

• Lost or non-existing documented communication of a contract's existence

1. How I-ConTrackS Works For Your Contracts in a nutshell:

The I-ConTrackS Main application is the center of interlinking the application suite for a simple but powerful end-user experience.

1. The suite consists of:

• 5 multiplatform apps but from this point forward we will discuss mainly the UX and buttons of the I-ConTrackS Main app.



• "Upload Agreements and New Requests" button:

1 Microsoft Form for the end-users to submit requests via the **"Upload Agreements and New Requests" button** to their relevant legal office/department for a new agreement to be drafted. This submitted form gets received by the <u>"Request Receiver"</u> who primarily would be charged by the "legal" office/department to ensure that the submitted requests conforms to the required standard and completeness.

• "Review and Approvals" button:

Once the <u>"Request Receiver</u>" is satisfied with the submission will he/she activate the **"Review** and Approvals" button to do a submission to the <u>"Draft Request Approver</u>" that is tasked to review the completed request and decide whether it is in order for an agreement/contract to be drafted. At this stage the review and approval process automation is activated. The centralized and structured back and forth collaboration messaging and approval decisions between <u>"Request Receiver"</u>, <u>"Draft Request Approver"</u>, <u>"Legal Reviewer"</u>, <u>"Financial Reviewer"</u> and <u>"Final</u> <u>Approver</u>" is streamlined, documented and also extended to automated alerts and approval actions via Microsoft Teams and Outlook.

• "Al Tracking" button:

The <u>"Request Receiver" or "Draft Request Approver"</u> will use the **"AI Tracking" button** to activate the tracking of agreements that have been approved by the <u>"Final Approver"</u> with all signatures appended. This button is also used where a status change request needs to be activated in the case for example a Dispute arises etc.

| I-ConTrackS Tracking ① | | \textcircled{B} Share \lor | Ħ | Ŧ |
|-------------------------------------|---------------------------|--------------------------------|--------|---|
| × | | | ~ | / |
| | | | | |
| | Renew | | | |
| General Notes | Extend | | | |
| | Dispute | | | |
| | Cancel | | | |
| | Activate Bridge Notice | | | |
| | Put on Termination Notice | | | |
| | Put on Hold | | | |
| Agreement Status Change request to: | | | \sim | |

This selection and submission will follow a similar approval process with solution starting by prompting the <u>"Legal Reviewer"</u> until the <u>"Final Approver"</u> decision decides if I-ConTrackS will change the agreement status in Sharepoint and alert all stakeholders.

The "Other Party" in the agreement only receives notifications of Termination automatically. All notifications remains internal, confidential and secure.

2. Delegation of Authority - CRITICAL

Use Supplied App named I-ConTrackS Delegation of Authority as follows:

The individuals or accounts selected using this app the by your authorized user are from your organizations Microsoft Entra ID (formally Azure Active Directory). This step is **critical** to apply for the solution to work as intended.

There are primarily 7 delegation levels that is required by the system. There is no limit on how many times the same person/account appears in the list but ALL of the levels in the apps delegation list **must** be assigned a person/account.

Below are some demo images:

You start with I-ConTrackS Main app and select the "AUTHORITY SETTINGS" button to launch the "I-ConTrackS Delegation of Authority" app. Enter your Microsoft credentials when prompted.

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3. OneDrive

Simply navigate to your organizations shared drive and copy the link to paste it in the provided space in I-ConTrackS Main app and select the tick button to save it as seen in the image below. This will allow all approved end-users to just select "Your Agreements Folder on OneDrive" button to navigate them to the desired common file directory.

This also works with DropBox and similar file repositories.



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FUNDAMENTALS TO NOTE WHEN USING THIS SOLUTION:

1. Most critical is to know that the Delegation of Authority MUST be assigned to all 7 authority roles in the Delegation Settings app. The Delegation Settings app can be launched from the I-ConTrackS Main app.

There are 7 roles to be delegated. Each role has a specific activity in the entire process of which I will only need to define the first 3 as follows:

A. Routine Notifications

- Receives daily notifications. The user account assigned here would usually not belong to a natural person

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- **B.** Support
 - Is the Internal technical support contact
- C. Request Receiver
 - Is the account that receives all the requests for a draft agreement and prepares them for submission to be approved to be drafted. This is a key account because this account also submits the drafted agreement for review and approval.
- 2. Automated Tracking on any agreement will not work unless tracking on that agreement is activated via the I-ConTrackS Tracking app even though a requested agreement has been approved or a legacy one has been loaded via the Request Form. The notification dates must be stored using the Tracking app.
- 3. The process for any new agreement must happen in the following system sequence:
- **Request Form** New request activates automation to approve or decline the drafting of new agreement
- **Review and Approvals app** The drafted agreement gets submitted here to activate automated Review and Approval process
- Tracking app Newly approved agreements that succeeded the above process and the legacy
 agreements that were loaded with the form gets listed in the gallery of this app for auto tracking to
 be activated by the end-user. When an agreement is selected from the gallery for the first time the
 auto calculated dates appear in the Tracking app only and are saved for auto monitoring and
 tracking when the user hits the save button.
- 4. Existing/legacy contracts also gets captured using the Request Form.