

## Create Contract Deliverables

**Audience:** Procurement Managers, Procurement Contract Administrators, Buyers

**Purpose:**

### One-Time and Repeating Deliverables

You can create both one-time and repeating deliverables. A one-time deliverable tracks the performance and deadlines for an individual required action that must be performed by one of the parties in the contract. A repeating deliverable tracks a deliverable that must be performed periodically, for instance a progress report that must be submitted every week after the agreement is signed.

The following diagram uses an example to illustrate the two variable types:

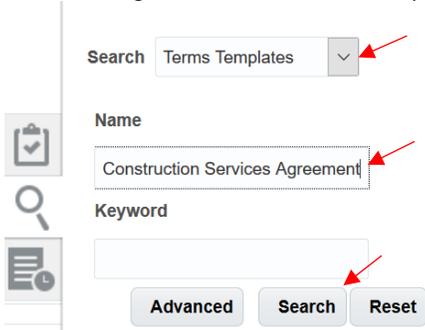
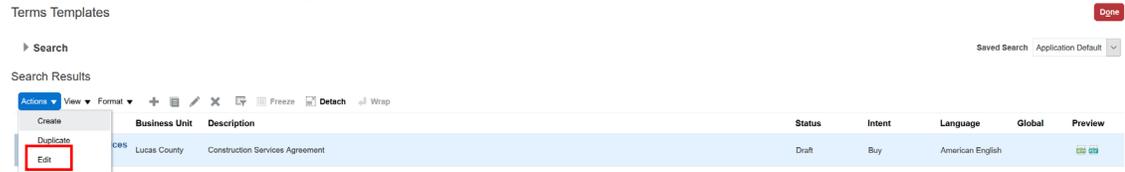
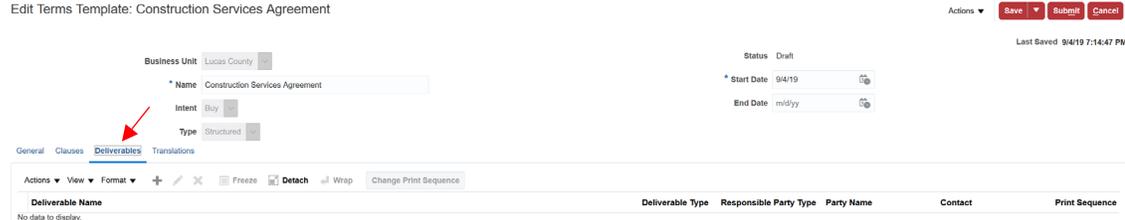
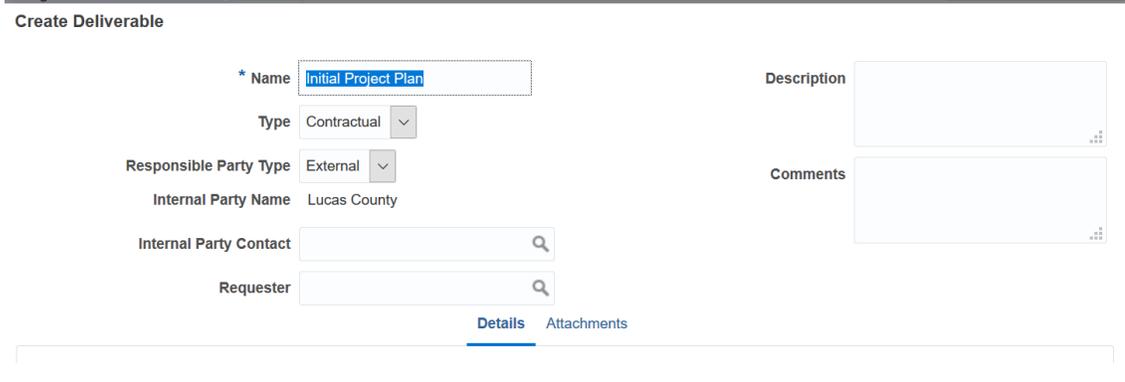
- A one-time deliverable (Report 1) that the responsible party contact must provide that is due one week after the agreement is signed.
- A repeating deliverable (Report 2) that the responsible party contact must provide weekly after the contract is signed.

After the contract is signed and active, the application automatically creates instances of the two deliverables which can be viewed and updated by the responsible party contact using the Manage Deliverables page and the Deliverables bin. The due dates for each deliverable in this example are based on the date the contract was signed.

Note: Note that the name of each deliverable instance for a repeating deliverable is the same. The only difference is the due date.

The internal contact, requester, or responsible external party contact attaches the report file to the appropriate instance of the deliverable and changes its status to Complete. This job aid will assist you with creating one-time and repeating contract deliverables.

Step	Action
1	Navigate to <b>Contract Management &gt; Terms Library &gt; Search Menu.</b> 
2	<b>From the Search</b> field, ensure your template is selected; in this example, the Terms Templates is selected. You can search by full name of template, or keywords, and click the <b>Search</b> button.

	<p><b>Select XXXXXXX Contract Terms Template</b> in <i>Draft</i> status. (In this example Construction Services Agreement was selected.)</p> 
<p>3</p>	<p>Select template by clicking the row, and click <b>Actions &gt; Edit</b>.</p> 
<p>4</p>	<p>Select <b>Deliverables</b> tab. enter</p> 
<p>5</p>	<p>Click the Add <b>+</b> icon and enter the following:  <b>Name</b> = XXXXXXX Test One Time Deliverable (In this example 'Initial Project Plan' was entered)  <b>Type</b> = Contractual  <b>Responsible Party</b> = External.</p> 
<p>6</p>	<p>Enter the following in the <b>Due Date</b> section:  <b>-Select One-Time Deliverable</b>  <b>-Select Relative Date = Contract Started</b>  <b>-When: After</b>  <b>-Period: 1 Days</b></p> <p>Enter the following in the <b>Notifications</b> section:</p>

- Select Prior to due date
- Period: 1 Days
- Select When deliverable is overdue.

Due Date

One-time deliverable  Repeating deliverable

Fixed date

Relative date

Event Contract Started

When After

Period 1 Days

Notifications

Prior to due date

Period 1 Days

On status change

When deliverable is overdue

Escalate after due date

- 7 Click the **Create Another** button.

Create Deliverable

\* Name Initial Project Plan

Type Contractual

Responsible Party Type External

Internal Party Name Lucas County

Internal Party Contact

Requester

Details Attachments

Due Date

One-time deliverable  Repeating deliverable

Fixed date

Relative date

Event Contract Started

When After

Period 1 Days

Additional Information

Context Segment

OK Create Another Cancel

- 8 Enter the following:
- Name** = XXXXXXXX Test Repeating Deliverable (In this example 'Status Report' was entered.)
  - Type** = Contractual
  - Responsible Party** = External.
  - Description** = Example 'Weekly Status on Progress'

Create Deliverable

\* Name Status Report

Type Contractual

Responsible Party Type External

Internal Party Name Lucas County

Internal Party Contact

Requester

Details Attachments

Description Weekly Status on Progress

Comments

- 9
- Due Date:**
  - Repeating Deliverable
  - Fixed Date = (Example 9/30/19)
  - End Date
  - Fixed Date = (Example 10/30/19)
  - Frequency = 4 Weeks
  - Repeat On = Monday.

	<div style="border: 1px solid red; padding: 5px;"> <p><b>Due Date</b></p> <p><input type="radio"/> One-time deliverable <input checked="" type="radio"/> Repeating deliverable</p> <p><b>Start Date</b></p> <p><input checked="" type="radio"/> Fixed date 9/30/19 <input type="radio"/> Relative date</p> <p><b>End Date</b></p> <p><input checked="" type="radio"/> Fixed date 10/30/19 <input type="radio"/> Relative date</p> <p>Frequency 4 Weeks</p> <p>Repeat On Monday</p> </div>	<p><b>Notifications</b></p> <p><input type="checkbox"/> Prior to due date</p> <p><input type="checkbox"/> On status change</p> <p><input type="checkbox"/> When deliverable is overdue</p> <p><input type="checkbox"/> Escalate after due date</p>
10	Click <b>OK</b> .	
11	Click <b>Save</b> and then click <b>Submit</b> .	

The following figure illustrates the example of one-time and repeating deliverables.

