



Contract Management Document Wizard

Document Selection Wizard functionality within the Medius Contract Management allows Contract Administrators to design and apply a document selection wizard to the end users. As part of the contract record creation process, it is possible to configure the system to have a set of customizable questions. Once a user completes these questions, the system would then automatically recommend the right contract template based on the answers that a user selects.

For example, the document selection wizard could make recommendations based on factors such as:

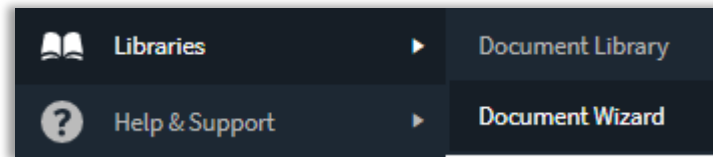
- The Legal Entity
- The region in which the contract is being signed
- The payment terms for the agreement
- The purchasing category and more




The reason behind this functionality is not only to save time when deciding which contract template to use, but to also remove the need for back and forth communication between Contract Managers and Legal Teams when trying to identify the relevant base templates for contract negotiations.

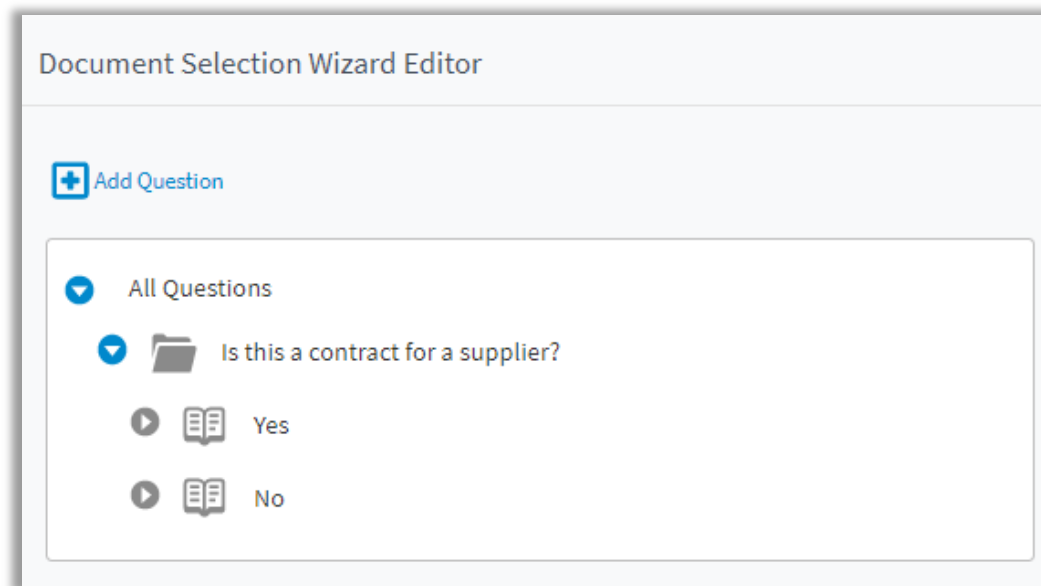
Note: Enabling this feature requires configuration. If you would like to have the Contract Management Document Wizard enabled on your system, speak with your Medius Account Manager.

Accessing the Document Wizard

When Document Wizard is enabled, Contract Administrators will have access to a menu item underneath **Libraries** called **Document Wizard**. This will bring Contract Administrators to the Document Selection Wizard Editor.

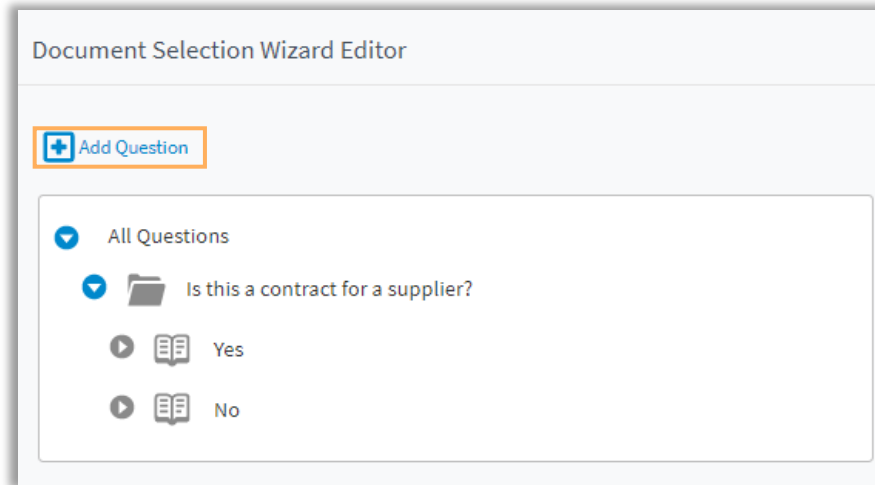


If any questions have already been configured in the editor, they will be visible on this page. Questions are indicated by the  icon, while Answers to Questions are indicated by the  icon. You can use the  icon to expand and review the content underneath questions or answers.

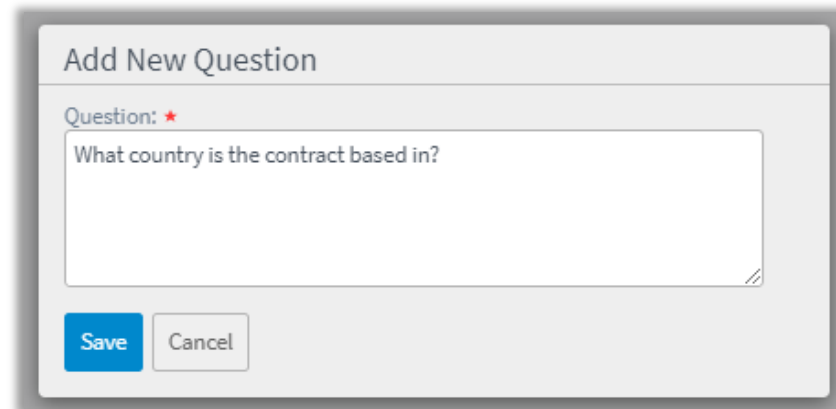


Adding a Question

To Add a Question, click **Add Question** in the top left.

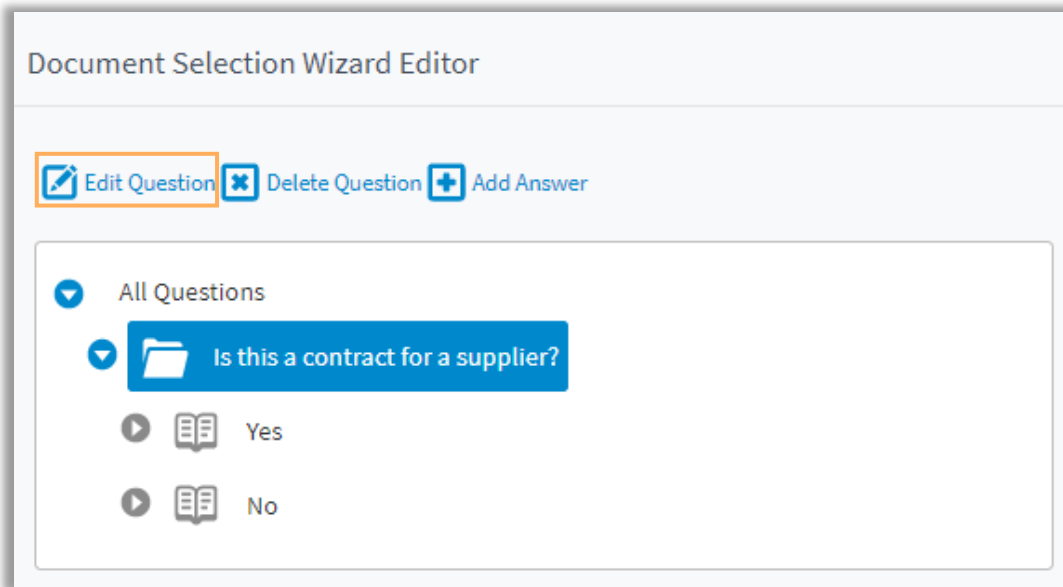


This will present a popup where you can input the text for your question. Once you have entered your text, click **Save** and the new question will be added to the bottom of the editor.

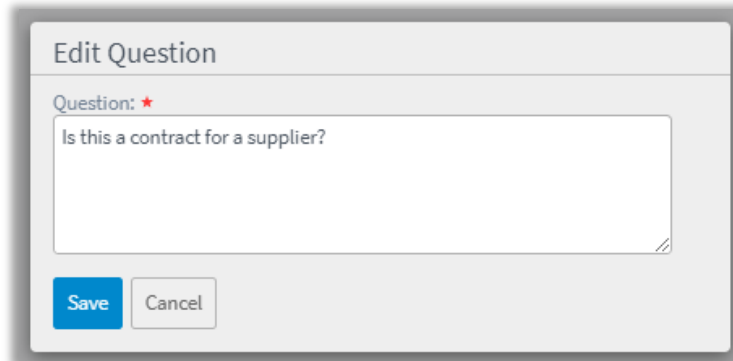


Editing a Question or Answer

To edit a Question or Answer, click the Question or Answer you wish to edit and click the **Edit Answer** or **Edit Question** icon that appears in the top left of the screen.

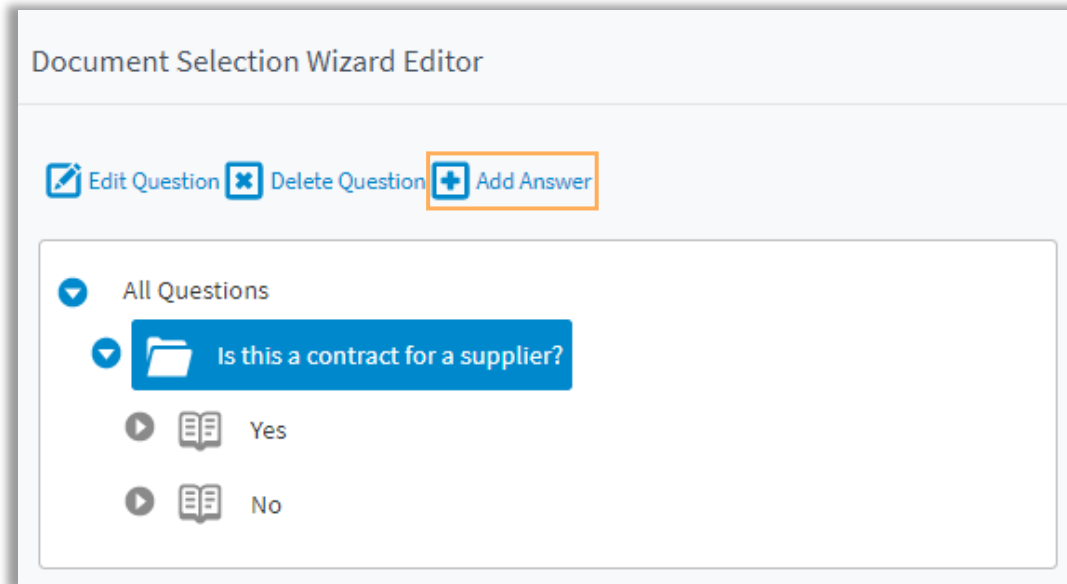


Once selected, a popup will appear that will allow you to edit and save the text for the Question or Answer.

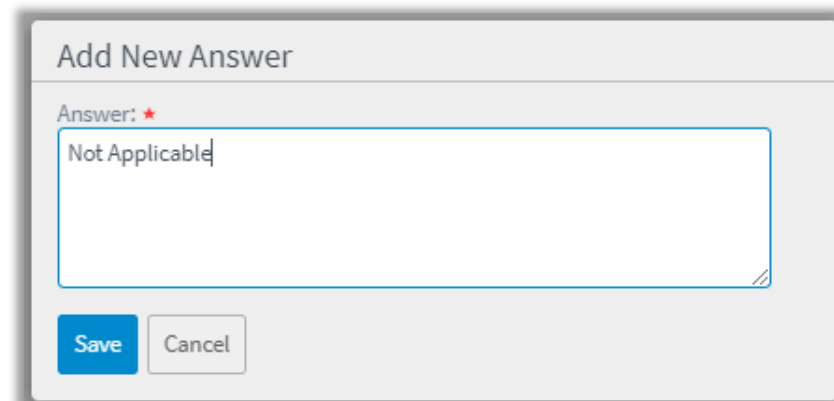


Adding an Answer to a Question

To add an Answer to a Question, select the desired question and click **Add Answer**.



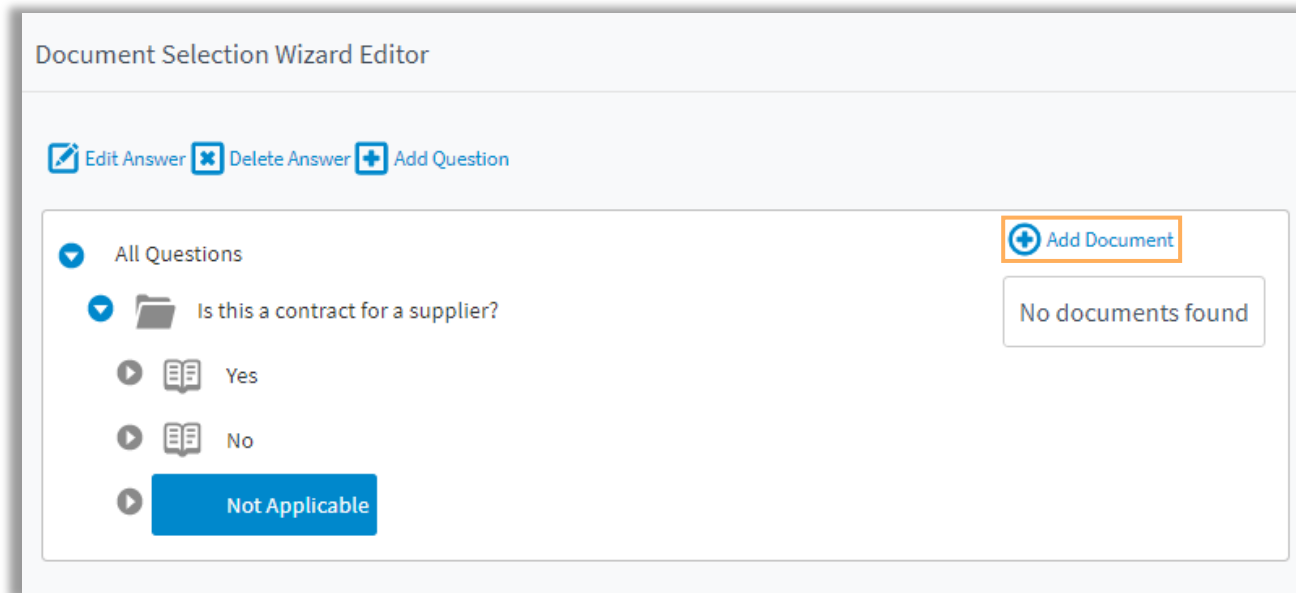
This will present a popup where you can input and save the text for the new answer.



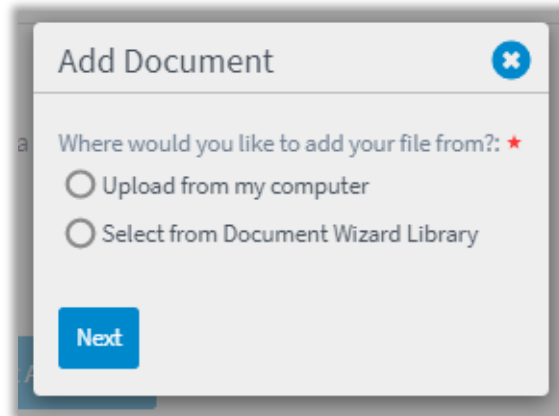
Adding a Document to an Answer


Once your Answer is configured, you can add a document to it. The document you add will be recommended as a contract template if the responder to the Document Wizard questionnaire selects the Answer it is added to. To add a document to an Answer, follow the below steps.

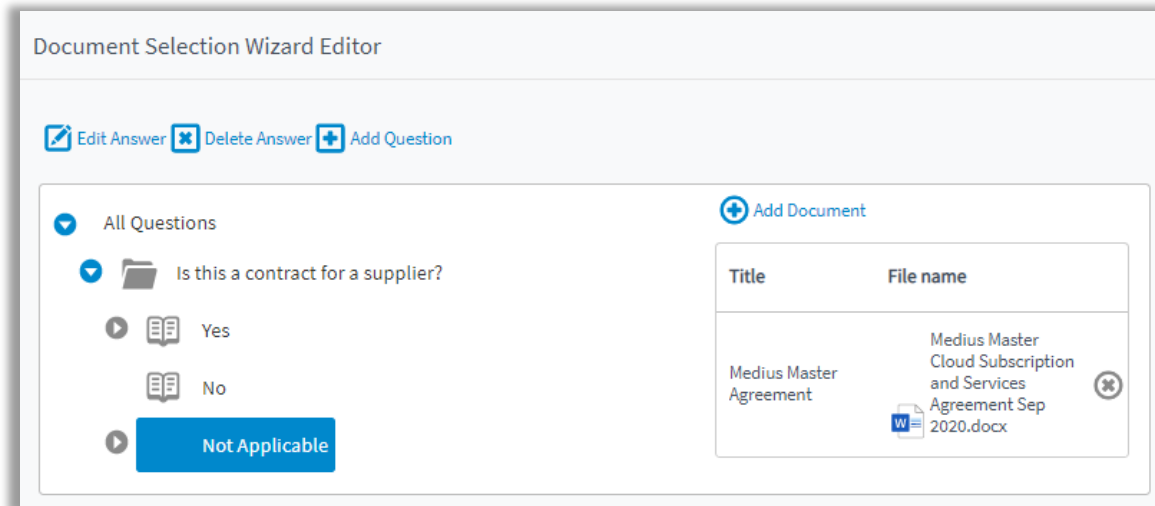
1. Select the Answer you wish to add a document to and click the **Add Document** button on the right.



- In the popup that appears, you can select if you would like to upload the document from your computer, or add the document from the Document Wizard library. The Document Wizard Library is a collection of documents you've already uploaded to the document wizard.



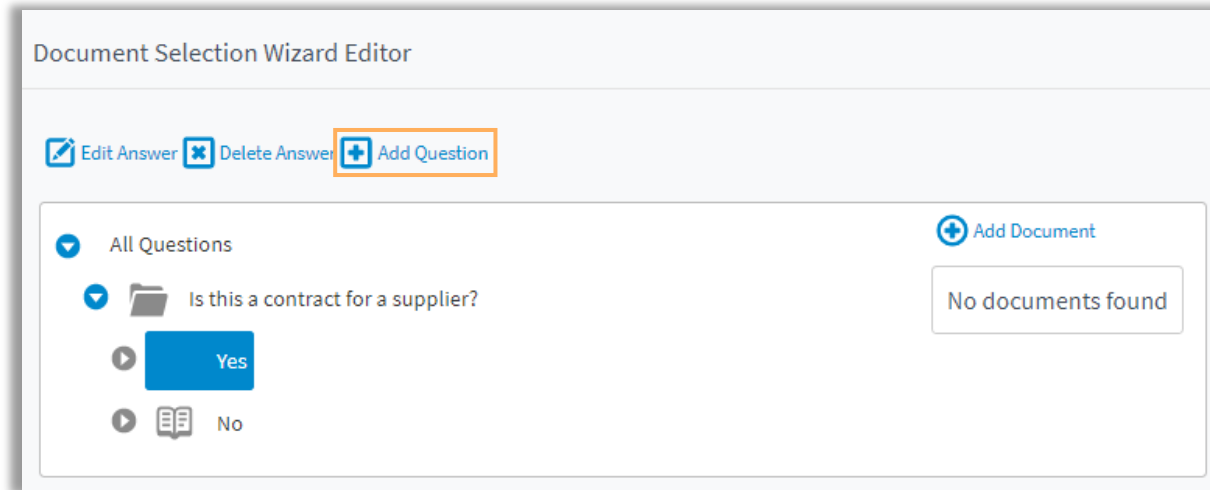
- Once the document has been added, it will be visible on the right side of the editor when the associated Answer has been selected. From here, you can follow the same steps to add more documents to the Answer, or press the  icon to remove an existing document.



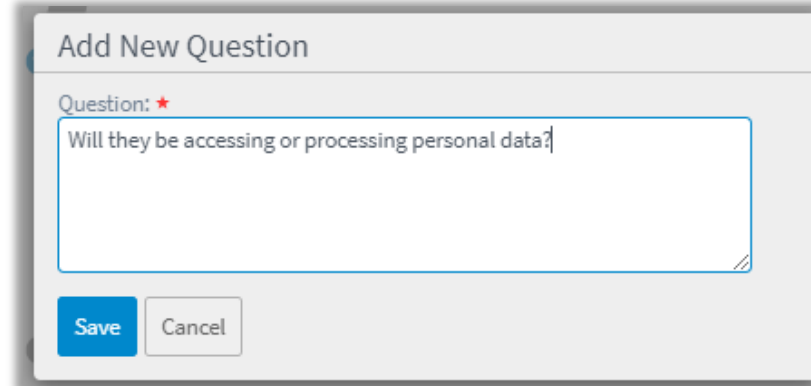
Adding a Question underneath an Answer

You may want to present different Questions in the Document Wizard depending on answers to other Questions. To set this up, follow the steps below.

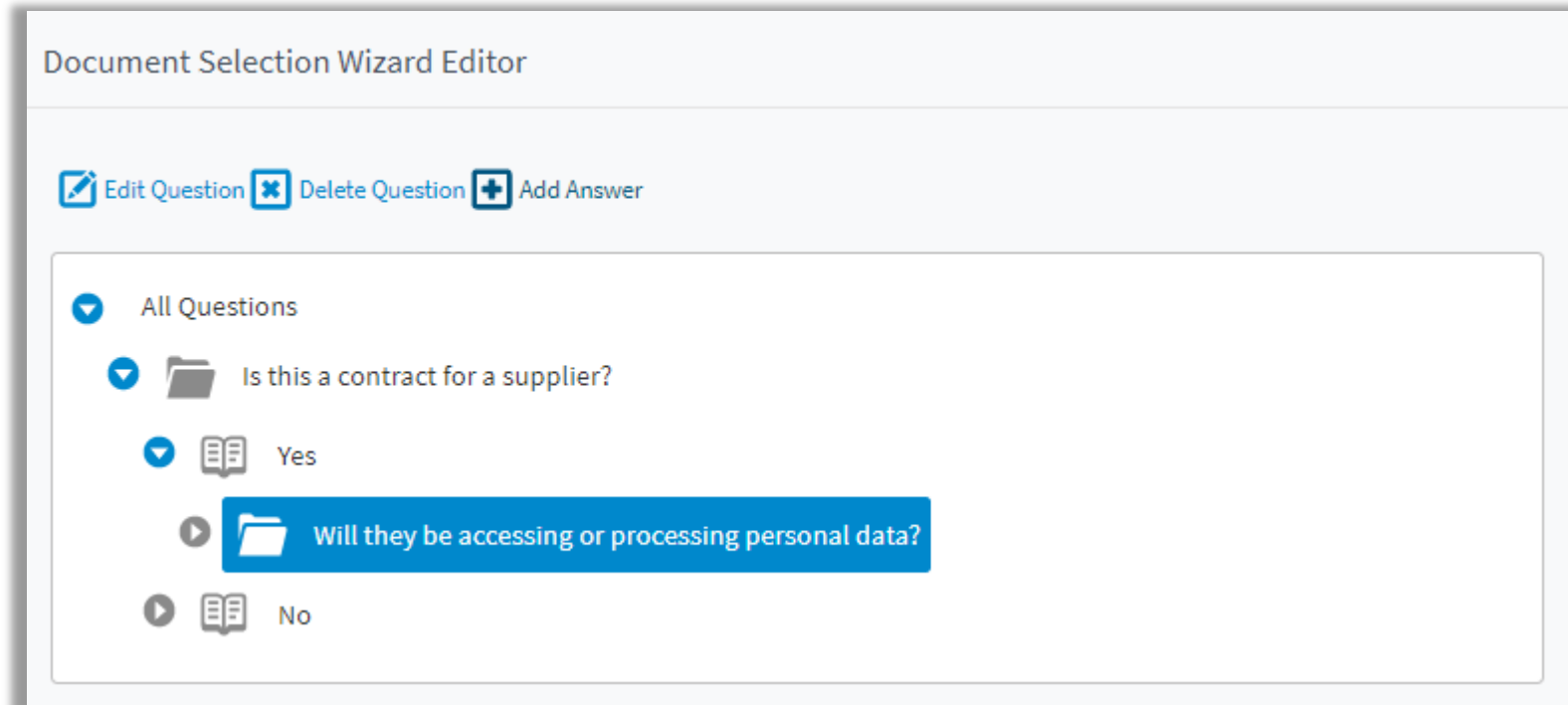
1. Select the Answer you wish to enable a new Question and click **Add Question**.






2. Fill in the text for the new Question in the popup and click **Save**.







3. Once saved, your Question will appear underneath the Answer it was added to. From here, you can add Answers to the new Question and subsequent Questions and Answers, depending on the structure of your questionnaire.

A screenshot of the "Document Selection Wizard Editor" interface. At the top, the title "Document Selection Wizard Editor" is displayed. Below the title, there are three action buttons: "Edit Question" (with a pencil icon), "Delete Question" (with an 'X' icon), and "Add Answer" (with a plus icon). The main content area shows a hierarchical tree structure of questions and answers. The root node is "All Questions" with a dropdown arrow. Underneath it is a folder icon followed by the question "Is this a contract for a supplier?". This folder is expanded to show two answer options: "Yes" and "No", each with a document icon. The "Yes" answer is further expanded to show a sub-question: "Will they be accessing or processing personal data?". This sub-question is highlighted with a blue background. Below it is the "No" answer, also with a document icon.

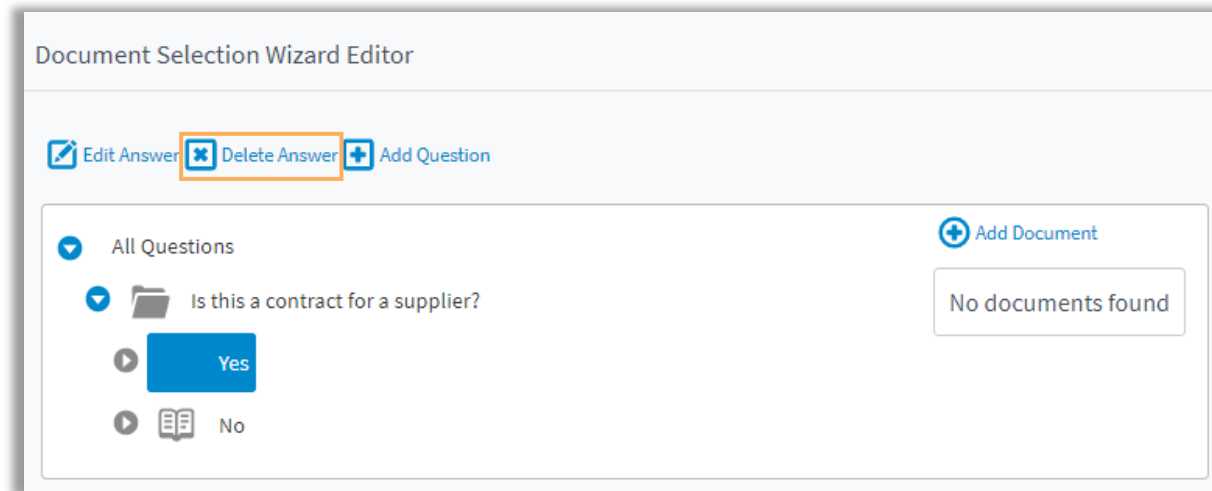
Document Selection Wizard Editor

 Edit Question  Delete Question  Add Answer

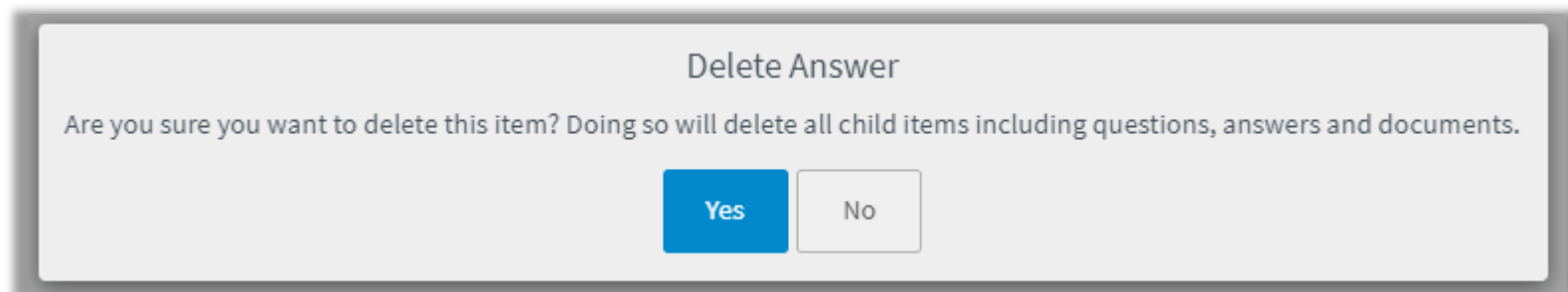
- ▼ All Questions
 - ▼  Is this a contract for a supplier?
 - ▼  Yes
 - ▶  Will they be accessing or processing personal data?
 - ▶  No

Deleting a Question or Answer

To Delete a Question or Answer, click the Question or Answer you wish to delete and click **Delete Question** or **Delete Answer**.



This will present a confirmation popup informing you that any Questions or Answers underneath the content you are deleting will also be deleted. If you wish to proceed, click **Yes** and the content will be deleted.





Responding to a Document Wizard Questionnaire

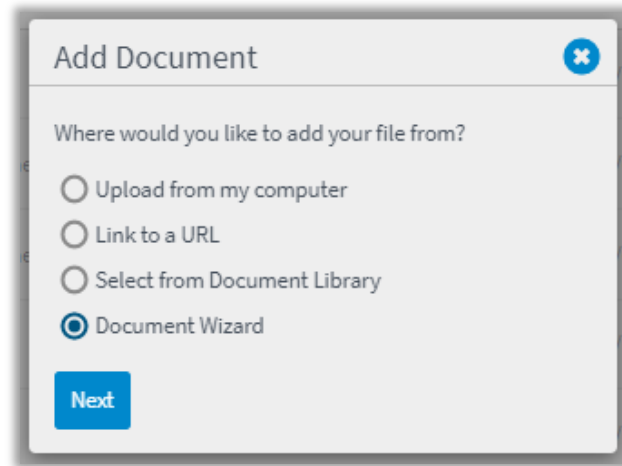
Once a Document Wizard questionnaire has been created in the editor, it can be responded to by users who are uploading a document to a contract. To do this, follow the steps below.

1. Navigate to the desired contract record and click **Add Document** underneath the **Documentation** tab.

The screenshot displays the 'Software Implementation Services' interface. At the top, there is a navigation bar with a back arrow, the title 'Software Implementation Services', and several utility icons: 'Send For Approval', 'Alerts' (with a '2' notification), 'Notes' (with a '3' notification), and 'Audit'. Below this is a progress bar with six stages: 'Initial Creation' (active), 'Awaiting Approval', 'Approved', 'Effective', 'Ended', and 'Archived'. A secondary navigation bar contains 'Contract Details', 'Documentation' (highlighted with an orange box), and 'DocuSign'. In the top right corner of the main content area, there is a blue '+ Add Document' button, also highlighted with an orange box. Below the navigation, there are filter buttons for 'Contract Documentation' (6), 'Supporting Documents' (5), 'POs', 'Invoices', 'SOW' (1), and 'Price Lists' (1). The right side shows 'Page 1 of 1', 'Items Per Page' set to 10, and '6 records returned'. A table below lists the documents:

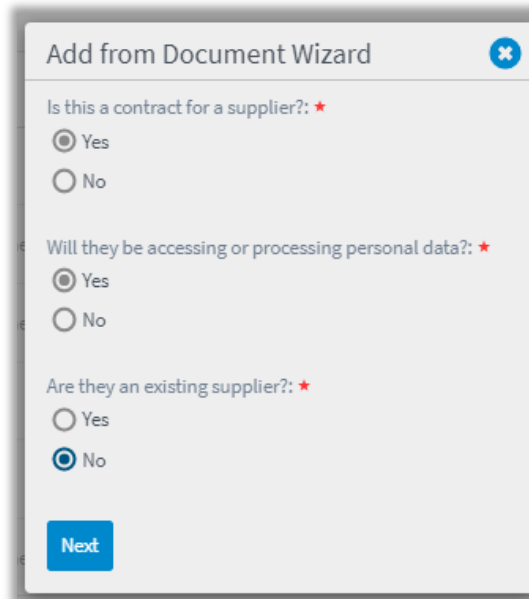
Title	Type	Description	Uploaded	Added By	File Name
Non Disclosure Agreement	Other		14/12/2020 10:24:27	Huzy Bahadur	Basic-Non-Disclosure-Agreement.docx
Sales Presentation	Supporting Contract Documentation		12/02/2020 20:58:03	Huzy Bahadur	Sales Presentation.pptx

2. The popup that presents will ask how you would like to add a document. Select **Document Wizard** and click **Next**.



Note: This process can be configured to only allow documents to be uploaded via the Document Wizard questionnaire. If you would like this option to be applied on your system, speak with your Account Manager or Implementation contact.

3. The questionnaire built in the editor will then be presented. Provide your responses and click **Next**.

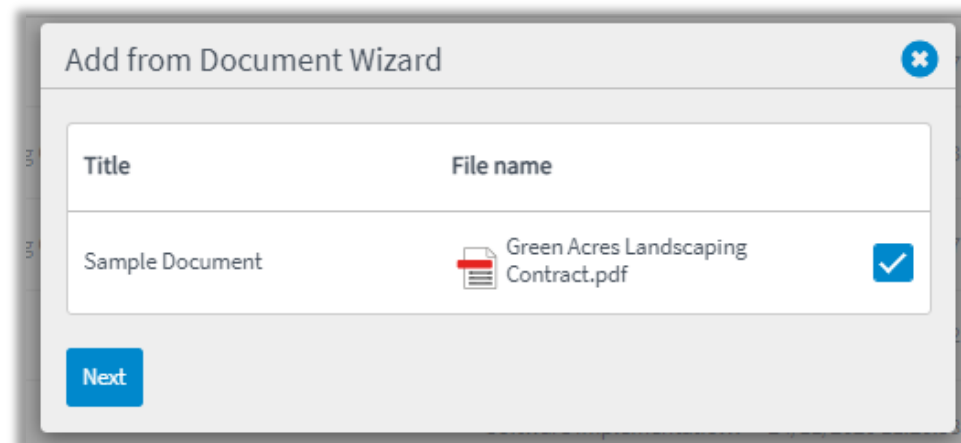


The screenshot shows a dialog box titled "Add from Document Wizard" with a close button in the top right corner. It contains three questions, each with radio button options for "Yes" and "No":


- Question 1: "Is this a contract for a supplier?*" with "Yes" selected.
- Question 2: "Will they be accessing or processing personal data?*" with "Yes" selected.
- Question 3: "Are they an existing supplier?*" with "No" selected.

A blue "Next" button is located at the bottom left of the dialog.

4. If there were any documents associated with provided answers, they will be recommended to be added on the next screen. You can uncheck any documents you do not wish to add and click **Next**.



The screenshot shows a dialog box titled "Add from Document Wizard" with a close button in the top right corner. It displays a table of recommended documents:

Title	File name	
Sample Document	 Green Acres Landscaping Contract.pdf	<input checked="" type="checkbox"/>

A blue "Next" button is located at the bottom left of the dialog.



5. Once the document(s) are confirmed. You will be brought to a screen where you can provide the **Title**, **Description**, **Sleeve**, and **Attachment Access** for the document. Once the details have been provided, click **Save** to add the Document, or **Cancel** to cancel the upload.

A screenshot of a software dialog box titled "Add from Document Wizard". The dialog box has a light gray background and a blue close button in the top right corner. It contains several input fields and dropdown menus. The "Title" field is required (marked with a red star) and contains the text "Master Services Agreement". The "Description" field is empty. The "Type" dropdown menu is set to "Contract". The "Filed Under" dropdown menu is set to "Contract Documentation". The "Attachment Access" dropdown menu is set to "All Users". The "Document" field shows a document icon and the filename "Green Acres Landscaping Contract.pdf" with a blue pencil icon to its right. At the bottom of the dialog box are two blue buttons: "Save" and "Cancel".

Add from Document Wizard

Title: ★
Master Services Agreement

Description:

Type: ★
Contract

Filed Under: ★
Contract Documentation

Attachment Access: ★
All Users

Document:
Green Acres Landscaping Contract.pdf

Save Cancel