



## Building value on top of Microsoft SharePoint

Dolphin Contract Manager is a world-class Contract Lifecycle Management application that has been developed on the Microsoft SharePoint platform.

### Highlights

Dolphin Contract Manager is an enterprise contract management application that has been developed on the Microsoft SharePoint platform.

Dolphin Contract Manager extends the value of Microsoft SharePoint through uniquely developed components and customisations to provide a high level of out-of-the-box standard functionality that can be used as a base-line to customise further to suit each customer's environment and contract processes.

Of course, you could decide to develop your own contract management solution, but why not take advantage of the 18 months of detailed research and 8 months of development that has gone in to creating this edition of Dolphin Contract Manager and leave the development, support, maintenance and future roadmap overhead to us?

Dolphin Software has developed and configured a number of core features and functions to enable standard Microsoft SharePoint® and Office® to provide world-class Contract Lifecycle Management capabilities. A non-exhaustive list of these features is listed below:

#### 1. Dolphin Content types

Dolphin Content types are pre-configured contract containers that include pre-configured metadata fields provided from the Dolphin library of available metadata fields.

#### 2. Metadata management

Metadata in Dolphin Contract Manager is managed at multiple levels in the system. Metadata is captured at a master folder level, as well as sub-folder level and at a contract document level – this enables management reports, alerts and obligations to be created at any level within a contract transactional folder – as below:

- Folder
  - Sub-folder
    - Contract document(s)

#### 3. Contract party database

Dolphin Contract Manager comes with a contract party database of official contract party contact details and other attributes that are included in contracts and agreements. Contract party contact details can be imported from third party contact data repositories, like CRM, eProcurement or ERP systems.

#### 4. Hierarchical contract relationships

Dolphin Contract Manager provides multi-level contract folder/container structures that allow for multi-level contract relationships to be managed. Both folders/containers and contract documents can be electronically linked to master and parent contract entities allowing reports and alerts to be created at any level in a contract relationship

**5. Contract clause library**

Dolphin Contract Manager includes a comprehensive legal clause library that allows contract clauses and sections to be converted in to reusable objects. Clauses can be classified as dependent and independent clauses and can be certified digitally to ensure that the appropriate level of sign-off and approval has been granted for the use of clauses.

**6. Contract clause picker (embedded within MS Word client)**

Dolphin Software has developed a contract clause picker function that is embedded as a Dolphin margin within the MS Word 2007 interface. The clause picker is accessed via the Dolphin menu in the MS Word 2007 ribbon tab. The clause picker allows authorized users to select appropriate contract clause wording to be inserted directly in to a natively (or third party) authored contract.

**7. Contract clause tracker**

If a contract clause from the Dolphin Clause Library is selected for use in a contract, a reference code is inserted in the metadata of the contract that allows Dolphin Contract Manager users to rapidly track the usage of particular clauses.

**8. Dynamic contract editing in MS Word with metadata completion**

Dolphin Software provides two options for authoring new contracts:

- a. Document automation via Intelledox
- b. Native MS Word with enhanced dynamic metadata and variable data forms within the MS Word interface.
  - Users are able to complete variable contract data in an online form within MS Word that will be inserted directly in to the contract (alongside selected contract clauses from the clause library) and will complete the contract metadata profile.

**9. Linking of document attributes with contract metadata fields**

Dolphin Software allows certain document attributes (like a date field or numeric value) to be related directly to its corresponding metadata field in the Dolphin Contract Library. This enables contract metadata to always stay in sync with the contract document.

**10. Role based dashboards:**

- a. *Welcome page dashboard: summary of contract landscape*

The welcome page dashboard provides business users with a role-based summary of their contract world – displaying KPI charts, workflow tasks, upcoming contract obligations/deliverables and other useful functions.
- b. *Management Information/KPI dashboard: Dolphin Report Center*

Each user or user role can have a tailored management reporting and KPI dashboard to provide them with the management information that they require to keep track of contract milestones, commitments and obligations. Management information can be provided in a combination of data or graphical reports. Read-Only users can still access contract reports that are saved as MS Excel files.

- c. *Contract Party dashboard: unique contract party-specific view*  
Contract Management specialists, who manage a specific number of contract relationships will find the Dolphin Contract Party Dashboard an invaluable resource. This dashboard provides a unique view on a single contract party at a time, showing:

1. *Contract obligations in a timeline report*
2. *Key KPIs and management reports specific to that contract party*
3. *Detailed contract obligations/deliverables tracking*
4. *Outstanding tasks relating to the contract party*
5. *Direct access, without browsing, to contract party contract folders and containers.*

#### **11. Contract Obligations/Deliverables manager**

Dolphin Contract Manager allows contract obligations and deliverables (like service level agreements, quality controls, penalty charges, customer service targets, etc) to be created, distributed to both specialist contract management staff and non-specialist business users so that they can be tracked, auctioned and managed at the appropriate time.

#### **12. Dolphin Data Warehouse**

The Dolphin Data Warehouse is a specially configured data repository that stores and manages data in the Dolphin Contract Manager application. The Dolphin Data Warehouse holds the central contract data model and enables the correct data to be made available to users in the form of management reports, automatic obligation generation and alerts. It also acts as the repository for third party data where 'actual' data needs to be compared from line-of-business systems with 'planned' data from the contract management environment.

#### **13. Dolphin report builder**

Dolphin Contract Manager ships with a report builder interface that allows business users to rapidly create new management reports and dashboards for themselves (if authorized) and/or for their peers.

#### **14. Multi-lingual support**

Dolphin Contract Manager has been designed to support multi-lingual environments. A linguistic conversion table is shipped with the product to enable rapid localisation in to non-English languages if required.

#### **15. Multi-currency support**

Dolphin Contract Manager also supports multi-currency environments, allowing management reports to display a baseline currency with aggregate data from several other currencies. The system supports all current official currencies and exchange rates against a base currency can be manually inputted or can be updated via web services on a regular basis.

## 16. Dolphin standard role groups

Dolphin Contract Manager ships as standard with five common user role definitions, these are as follows:

<b>Dolphin Contract Manager role</b>	<b>Definition</b>
<b>Contract Designer</b>	Normally a legal or para-legal function: responsible for creating and maintaining legal contract templates and clauses
<b>Contract Manager</b>	Full super-user rights. Can create new/update all contract documents, contract parties, metadata, obligations and tasks. Can create new/update key reference information such as contract parties etc. Cannot re-configure site.
<b>Contract Executive</b>	Read-only access to system with executive Dashboard and workflow approval rights
<b>Contract Read-Only</b>	Read-only access to the system
<b>Contract Initiator</b>	Can Create new/update contracts that they have created themselves. Can update tasks or obligations that are assigned to them.

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