



# UpsideContract

## Version 5.3 and 5.4 Highlights

### Overview

Like previous versions, UpsideContract Version 5.3 and 5.4 are full of valuable enhancements that improve usability for end-users. The main focus this round is on efficiency and configuration: improved performance which results in quicker print, import, and export time; shortcuts to reduce contract creation time; and more configurable fields that accurately reflect user preference. Leverage on UpsideContract's user-friendly interface to streamline business processes.

### UpsideContract 5.3 Updates

**Detail Entry Distribution:** This new feature allows users to distribute many contract details across multiple general ledger (GL) codes at once. The bulk distribution page enables details to be dispersed according to percentage and reporting errors. This drastically reduces the amount of manual repetitive labor previously required to distribute details one-by-one. The single detail distribution page allows users to troubleshoot and correct errors as needed.

**Business Entity Hierarchy Enhancement:** Add child companies to parent companies directly from the Hierarchy tab to more accurately record various types of business relationships. The Business Entity Hierarchy page automatically loads a tree hierarchy listing the currently selected company for easy viewing purposes. Entities listed above the selected company will appear as "read only" to reduce the possibility of errors.

**Contract Summary:** Getting a quick, yet detailed contract summary has never been easier. By simply selecting a contract and clicking on the "Summary" button, users can generate summaries listing pertinent facts such as contract name, parties involved, and important dates in either HTML or PDF format; these summaries can then be printed or saved. The resulting report is customized with the user's preferred content, layout and formatting. The summary is fully configurable for each client and to their specification.

### UpsideForms Enhancements

**Data Version Comparison:** Rather than manually comparing different versions of a Form (which can be an arduous task), users have the capability to easily view differences in a separate pop-up window in print format view. At a glance, users can see discrepancies between two form versions through the use of different coloring. The ability to modify the form output has been added to display only the aspects the user wants to see.

**Import Secondary Data Source:** Users can upload a XML document to configure a Form's secondary data. This allows an UpsideForms user to include XML data that is external to UpsideContract to a particular Form for increased flexibility. This enhancement presents the opportunity for users to export Form data into a spreadsheet for offline processing and then import the data back into the application.

**Contract Inquiry Portal:** The Contract Inquiry Portal now leverages functionality from UpsideForms. This eases the negotiation process with contracting parties who require the ability to view or edit forms attached to contracts. Based on the permission level, contractors can alter a specific form within the workflow for increased efficiency.

### Solution Overview

UpsideContract is an enterprise-class contract management solution providing full contract lifecycle management functionality – including collaborative contract creation and negotiation, performance, compliance and risk management, amendment and renewal processing, commitment management and event management – in a package that is completely web-based with no plug-ins required.

UpsideContract is based entirely on Microsoft .NET technology, simplifying interoperability and integration with all other systems on a platform that provides significantly better performance and usability. The advanced design and flexibility of the user-configurable interface enables rapid user adoption while robust security ensures information and functions are granted only to the appropriate people.

Upside Software's 'Smart Template' and advanced document hierarchy technologies simplify management of contracts across the enterprise while flexible role and organizational hierarchy based security ensures each user has access to the documents and functionality they need.

UpsideContract also offers an extremely powerful forms module – UpsideForms. This optional module allows users to define their own forms for data capture and integrates them with the contracting process from the issuance of an RFX through the creation of the contract and subsequently the invoicing against those contracts – ultimately streamlining the contract lifecycle.

UpsideContract improves every aspect of the contracting process and sets the standard for enterprise contract management best practices.

**API Support:** UpsideForms has improved its extensibility by developing Application Programming Interface (API) support. Users can now leverage on the functionality of UpsideForms seamlessly using their own in-house system without having to learn a new application. For the end-user, this reduces the amount of data duplication and repetitive administrative tasks.

### UpsideContract 5.4 Updates

**Repeating Group Placeholders:** This type of placeholder can list the values of a collection of objects such as Stakeholders, Details, Deliverables, Events, and Compliance Items that are attached to a RFX or a contract. Once the value of a Repeating Group Placeholder is determined, it can be duplicated throughout a document resulting in increased efficiency. Repeating Group Placeholders automate the duplication process and allow multiple instances of a particular placeholder. The Repeating Group Placeholders can only be used in a table and be displayed when a document is printed or exported.

**Task Listing:** Outstanding tasks can be identified with ease in the Tasks window. Context-specific listing details such as Business Entity, Contract, Contract Request, Special Payment, eForm, Invoice, Library group, and Template will be displayed in the window in a user-friendly layout. Simply clicking on a particular task will take a user directly to the specific task within the application reducing the number of "clicks" required.

**Import/Export Enhancements:** The ability to import and export objects using XML files has been enhanced. Objects such as User Roles, User Defined Fields (UDFs), Templates, and Level-specific data can be easily imported or exported into UpsideContract; this helps users decrease the amount of time normally required to transfer data.

**Default Contract Reports:** Reporting capabilities have been improved to aid in analyzing contracts, customers, and partners for enhanced decision making purposes. New reports can be generated through the filter page allowing users to select desired parameters and existing reports have been modified for optimal usability.

**Workflow View:** Workflow diagrams, whether simple or complex, can now be previewed and printed in a user-friendly format to better communicate concepts to stakeholders. A workflow diagram can be presented in two formats: a summary view (which is mainly text) and a graphical view. Users can store hard copies of a workflow diagram to sign-off on any alterations made for documentation purposes.

**For more detailed information about UpsideContract, please visit:**

<http://www.upsidesoft.com/Upside+Software/Products/UpsideContract.htm>

### About Upside Software

Upside Software is the worldwide leader in Contract Lifecycle Management (CLM) solutions. Customers around the globe use Upside Software's suite of products to confidently perform Contract Management, Commitment Management, Sourcing & Procurement, and Invoice & Billing management activities throughout their organizations.

Upside Software's products address the needs of Enterprise (e.g. Fortune 500, Global 2000), Public sector (Federal, State / Provincial, Municipal and Health Care), and Small & Medium Enterprise (SME) customers. Customers realize significant cost savings while improving customer and supplier relationships. Upside Software's solutions are deployed in as little as 3 days and typically provide a full return-on-investment (ROI) in under a year.

Founded in 2000, Upside Software is a profitable, rapidly growing software company with an advanced, yet mature, and comprehensive product suite. The company has extensive experience delivering real value to customers of every size and in most industry verticals.

*For More Information:*

#### Upside Software Inc.

Suite 310, Manulife Place  
10180 – 101 Street  
Edmonton, Alberta, Canada  
T5J 3S4

Phone: 1-877-984-2455 (toll free)  
+1 780-702-1432 (local)

Fax: +1 780-702-1438

E-mail: [ask@upsidesoft.com](mailto:ask@upsidesoft.com)

Visit: [www.upsidesoft.com](http://www.upsidesoft.com)