

Adding an Obligation to a Contract for Contract Administrators

1. In the contract creation form, select **Obligations** from the left side of the screen.
2. Click **Add Obligation**.
3. Select **Add New Obligation**.
4. Enter a name that clearly identifies the obligation. This is the name you will see throughout the application and will also appear in the **Subject** line on emails sent regarding the notification.
5. Enter a description of the obligation under 256 characters.
6. **Optional** Search for and select one or more **tags** that apply to the obligation. These are labels that can be used when searching for the obligations. Use the **Type to filter** feature or click **Search** to display a list of available tags. Click **Save Changes** when all tags have been selected. Tags appear in the order chosen.
7. **Optional** Select one the following **Options**:
 - a. If the obligation involves providing documentation of any type, select the **Documentation Is Required** checkbox. If the checkbox is selected, the obligation owner will need to upload a file to the obligation before it can be completed. If this checkbox is left blank, attachments can still be added to the obligation, but the obligation can be completed whether or not there is an attachment.
 - b. Select **Prompt to Create Invoice When Marked as Complete** to have users prompted to create an invoice upon completion.
8. Select one of the following for **Frequency**:
 - a. Select **One Time** if the obligation will occur only once.
 - b. Select **Recurring** if the obligation will occur multiple times. If selected, additional fields are displayed where you can set up a schedule that determines each occurrence, as described in the steps below.
 - c. **NOTE:** The frequency type cannot be changed once the obligation is saved.
 - d. **NOTE: Dates** are entered at the contract level. You will not see calendar fields when creating an obligation for the **Obligation Library**.
9. **Optional** If you are creating a **Recurring** obligation, you can create a schedule for the occurrences as follows:
 - a. **NOTE:** Schedules do not need to be set in the **Obligations Library**. You can leave the default settings as is and set up a schedule once the obligation is added to a contract.
 - b. **Repeats Every** - Select a number and time period that reflects the interval between obligations (example-every 15 days). If you choose **Days, Weeks, Months, or Years**, you will also need to define the day obligation occurs as follows:

- i. **Days** - Select if you want to set the interval by days. The number entered will reflect the number of days between occurrences (example-every second day or every tenth day).
- ii. **Weeks** - Select the checkbox next to each day of the week you want the obligation to occur.
- iii. **Months** - Select the day of the month that you want the obligation to occur. You can enter a specific date or select a day of the week.
 1. **Date** - Select **Day** in the first drop-down field, then select a **Day of Month Number** for the date in the second drop down field.
 - a. **NOTE:** If day 29, 30, or 31 is selected and any month within the contract lifecycle has fewer than 29, 30, or 31 days, the notification will be sent on the last day of that month. For example, if the setting is 'on Day 30' of every month, and February has only 28 days, the notification will go out on the 28th day of February.
 2. **Day of the week** - Select **First, Second, Third, Fourth** or **Last**, which refer to weeks in the month. **Last** is for months that are five weeks long, then select a **Day of Week**. For example, if you choose **Second** and **Friday**, the obligation will land on the second Friday of the month.
- iv. **Years** - Select the month that the obligations occur in from the first drop-down field, example-in **January**, then select a **date** or **day of the week** for the occurrence as indicated for **Months**, above.
- c. **Start** - Select **On Contract Start Date, Before Contract Start Date, After Contract Start Date, On Custom Date, On Contract End Date, Before Contract End Date,** or **After Contract End Date** to define when the obligation schedule begins.
 - i. Select **On Contract Start Date** if the obligations begin when the contract reaches **Executed: In Effect** status.
 - ii. **NOTE:** Recurring obligations based on the contract start date can only be completed if contract start date cannot be edited. For example, these types of obligations on contracts in **Draft** status cannot be completed because the contract start date can still be changed. The same obligations on contracts in **Executed: Future** status can be completed because the contract start date is set.
- d. **End** - Select **By Contract End Date, Before Contract End Date, After Contract End Date, By Custom Date, After, By contract Start Date, Before Contract Start Date,** or **After Contract Start Date** to define when the obligation schedule is complete.
 - i. Select **By Contract End Date** if the obligation ends on the same day as the contract end date. Occurrences will be added or removed if contract end date changes.

- ii. Select **After** if the obligation schedule will end after a specified number of occurrences, then enter the **number**.
10. If you are creating a **One Time** obligation, you can select when the obligation will be due as follows:
 - a. **When** - Select **On Contract Start Date, Before Contract Start Date, After Contract Start Date, On Custom Date, On Contract End Date, Before Contract End Date, or After Contract End Date** to define when the obligation will be due.
11. Specify a **Due** time for the obligation.
12. Choose the **Time Zone** as follows:
 - a. Select the **Same as Contract** checkbox to use the same time zone as the contract it is added to.
 - b. If **Same as Contract** is not selected, select a **Time Zone** from the drop-down menu to select a different time zone to apply to the obligation. The **Time Zones** available are based on your system setup.
13. Click **Next**.