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| Test ScriptSAP S/4HANA - 18-09-20 | public |
| SAP S/4HANA for Enterprise Contract Management (1XV) |

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# Introduction

SAP S/4HANA for Enterprise Contract Management is an application that enables digitization of legal transactions within an organization. This application facilitates creation and management of legal content in enterprises in alignment with core business processes. It provides an integrated platform to run enterprise wide legal process more efficiently.

It connects processes, content, technology and people in legal departments. It also provides a central layer for legal content and an integrated platform for legal technology.

The solution provides the following capabilities:

* End-to-end digitize legal processes
* Create and manage context for legal transactions
* Create and manage legal transactions
* Clearly define tasks and responsibilities for legal transactions
* Clearly define the electronic workflows for managing or approving legal content
* Easily detect the at-risk legal transactions

# Purpose

SAP S/4HANA for Enterprise Contract Management connects processes, content, technology and people in legal departments. It provides a central layer for legal content and an integrated platform for legal technology.

The solution provides the following capabilities:

* End-to-end digitization of legal processes
* Create and manage context for legal transactions
* Create and manage legal transactions
* Easily detect at-risk legal transactions
* Provide extensibility to allow customer to add the fields based on their business needs

This document provides a detailed procedure for testing this scope item after solution activation, reflecting the predefined scope of the solution. Each process step, report, or item is covered in its own section, providing the system interactions (test steps) in a table view. Steps that are not in scope of the process but are needed for testing are marked accordingly. Project-specific steps must be added.

# Prerequisites

This section summarizes all the prerequisites for conducting the test in terms of systems, users, master data, organizational data, other test data and business conditions.

## System Access

|  |  |
| --- | --- |
| System | Details |
| System | Accessible via SAP Fiori launchpad. Your system administrator provides you with the URL to access the various apps assigned to your role. |

## Roles

Assign the following business roles to your individual test users. Alternatively, if available, you can create business roles using the following spaces with pages and predefined apps for the SAP Fiori launchpad and assign the business roles to your individual test users.

Note These roles or spaces are examples provided by SAP. You can use them as templates to create your own roles or spaces.

For more information about business roles, refer to Assigning business roles to a user in the [Administration Guide to Implementation of SAP S/4HANA with SAP Best Practices](https://help.sap.com/viewer/S4HANA2020_AdminGuide) .

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name (Role) | ID (Role) | Description (Space) | ID (Space) | Log On |
| Configuration Expert - Business Process Configuration | SAP\_BR\_BPC\_EXPERT | Business Process Configuration | SAP\_BR\_BPC\_EXPERT | Suggested sample User: <user>, representing the business role Configuration Expert - Business Process ConfigurationPassword: <password> |
| Administrator - Enterprise Contract Management | SAP\_BR\_ADMINISTRATOR\_LCM | Enterprise Contract Management Admin | SAP\_BR\_ADMINISTRATOR\_LCM | Suggested sample User: <user>, representing the business role Administrator-Legal Content ManagementPassword: <password> |
| Legal Counsel | SAP\_BR\_LEGAL\_COUNSEL | Enterprise Contract Management | SAP\_BR\_LEGAL\_COUNSEL | Suggested sample User: <user>, representing the business role Legal CounselPassword: <password> |
| Employee - Enterprise Contract Management | SAP\_BR\_EMPLOYEE\_LEGAL\_CONTENT |  |  | Suggested sample User: <user>, representing the business role Employee - Legal Content ManagementPassword: <password> |

## Preliminary Steps

### Manage Situation Types

Purpose

You can refer to the standard delivered template, create your own situation type for phases of legal transaction. With the configured situation, a notification is sent to the predefined recipients when the status of the phase is changed from Completed to Completed (Revision Needed).

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log onto Fiori Launchpad | Log onto the SAP Fiori launchpad as a Configuration Expert. | The SAP Fiori Launchpad is displayed. |  |
| 2 | Access the App | Open Manage Situation Types (F2947) under Situation Handling. | The Manage Situation Types screen is displayed. |  |
| 3 | Select the template to copy | Choose Standard Template and choose Go to search the Standard Situation Templates:Choose Standard Situation Templates: LCM\_PHASE\_STATUS\_CHANGE then choose Copy. | The Situation Type screen is displayed. |  |
| 4 | Create Custom Situation Type | On the New Situation Type screen and the Admin Information tab, make the following entries and choose Save:ID: Z\_LCM\_PHASE\_STATUS\_CHANGEName: Status of Completed Phase ChangedOn the Conditions tab, the Process Order 1 and filters Governing Law and Profile are predefined.The condition in this template defines that a situation is created with status Open when the status of one or more phases have been changed to Completed (Revision Needed), and a notification is sent. Filter parameters such as Governing Law and Profile are also predefined in the situation template. You can use these filters, for example, if you want situations to be triggered for a specific team of experts with the specified Governing Law and Profile.On the Batch Job Scheduling tab, make the following entries:Time Zone: for example, UTC+1Start Batch Job At: for example, 22:00On the Notification Recipients tab and in the Responsibility by Teams section, the following entries are predefined:Team Category: LCM CategoryResponsibility Definition: Profile, Governing Law IDMember Function: BlankThe predefined settings in this template determine that the notification addresses only members of the LCM Category team category. You can also use the predefined filters Governing Law and Profile to narrow down the recipients. For example, if the legal transaction is available for Governing Law IN and Profile GENERIC, only team members assigned with these attributes will be notified. | The situation type is maintained. |  |
| 5 | Enable situation type | Choose Yes when dialog box Enable Situation Type is displayed. |  |  |

### Create Categories

Purpose

Setting up Categories is required to classify a transaction in the most exact way and to identify the templates and text blocks, which fit to a transaction by comparing the categories between those objects. In the following test script, you are creating an example of procurement for setting up Categories.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comment |
| 1 | Log on | Log on to the SAP Fiori launchpad as an Administrator - Enterprise Contract Management. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the appropriate Fiori app | Open the Categories app under Administration. | The Categories screen is displayed. |  |
| 3 | Categories | In the Categories page, choose Create to create an object. | The Category screen is displayed. |  |
| 4 | New Object Header | Enter a Name, for example, Procurement. |  |  |
| 5 | General Information | In the General Information section, make the following entries:Multiselectable Values: Select the checkbox. |  |  |
| 6 | Save | Choose Save to save the Object. | The values Type Root and Category Level 0 are added automatically. The value for Obsolete is by default No.It then navigates to the Categories table where Root Procurement is created. |  |
| 7 | Find Your Category | Choose the category created in the previous steps. | The Procurement category is displayed. |  |
| 8 | Object Page | Then go to the Children subsection.Choose Create .For an existing root category, it is possible to generate dynamic child categories using the Generate Categories from Table option. Some default options are delivered by SAP, and new option could also be customized via via the IMG activity - Define Category Models in SPRO. | The Category screen is displayed. |  |
| 9 | New Object | In the Header section:For Name, enter IT Hardware for example.In the General Information section:Selectable: Select the checkbox.Choose Save. | The Procurement category is displayed. In the Children section, a new category is available.Category: IT HardwareType: LeafLevel: 1 |  |
| 10 | Repeat | Repeat steps 8 and 9 for creation of one more Children. For example, Name: Stationery | The Procurement category is displayed. In the Children section, a new category is available:Category: StationeryType: LeafLevel: 1 |  |
| 11 | In section Children | Under Category, choose IT Hardware. | It navigates to the IT Hardware object page |  |
| 12 | Object page | Choose Create to add two Children to IT Hardware, for example PCs and Mobile Phones. | Finally, under IT Hardware category, you should have two Children as follows:Category: PCsType: LeafLevel: 2Category: Mobile PhonesType: LeafLevel: 2When you go to the Procurement category, you will see the following under the Children section:Category: IT HardwareType: NodeLevel: 1 |  |
| 13 | Categories | Go back to the Categories screen. | The table should have the following entries:ProcurementType: RootIT HardwareType: NodePCsType: LeafMobile PhonesType: Leaf |  |

# Overview Table

This scope item consists of several process steps provided in the table below.

If your system administrator has enabled spaces and pages on the SAP Fiori launchpad, the homepage will only contain the essential apps for performing the typical tasks of a business role.

You can find all other apps not included on the homepage using the search bar.

If you want to personalize the homepage and include the hidden apps, navigate to your user profile and choose Settings > App Finder .

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step, Report, or Item | Business Role | App/Transaction | Expected Results |
| [Manage Context](#unique_10) [page ] 12 | Legal Counsel | Manage Contexts - for Legal Contract (F2346) | User is able to view context. |
| [Request Legal Contract](#unique_11) [page ] 19 | Employee - Enterprise Contract Management | Request Legal Contract (F2403) | User is able to view legal transactions. |
| [Manage Legal Transactions](#unique_12) [page ] 21 | Legal Counsel | Manage Legal Transactions (F2310) | User is able to edit the details. |
| [Approve Legal Transactions (Optional)](#unique_13) [page ] 25 | Employee - Enterprise Contract Management | My Inbox - All Items (F0862) | User is able to approve the transactions. |
| [Manage Legal Documents](#unique_14) [page ] 26 | Legal Counsel | Manage Legal Documents (F2453) | User is able to edit the legal documents. |
| [Manage Legal Tasks](#unique_15) [page ] 28 | Legal Counsel | Manage Legal Tasks (F2304) | User is able to edit the legal tasks. |
| [Check Enterprise Contract Management Overview](#unique_16) [page ] 30 | Legal Counsel | Enterprise Contract Management Overview (F2933) | User is able to see the overview of all legal contexts, legal transactions, legal documents and other CM objects. |

# Test Procedures

This section describes test procedures for each process step that belongs to this scope item.

## Manage Context

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

In this step, you can create your own context. A context describes a particular scenario or circumstance within which legal transactions are processed in a similar pattern. Within a context, you can predefine settings for transactions, which support a more standardized processing for them. While assigning a context to a transaction, these preconfigured settings get inherited to the item during creation.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori launchpad using business role Legal Counsel. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the appropriate Fiori app | Open Manage Contexts - for Legal Contract (F2346). | The Manage Context screen is displayed. |  |
| 3 | Manage Context | In the Manage Context page, choose Create to create an object. In the Profile dialog box, select Generic Profile. | The New Object screen is displayed. |  |
| 4 | New Object Page Header | Name: Enter for example, Purchasing PCs Germany.Version: Set to 1 as default.Status: Select Active from the drop down list.Language(Optional): Select the language.Governing Law(Optional): Select the referring governing law.Governing Law is mandatory if the integration with Enterprise Contract Assembly is enabled, otherwise the virtual document cannot be created for this legal transaction. |  |  |
| 5 | General Information | In the General Information section, make the following entries:Access Level(Optional): The values can be defined via IMG activity - Define Access Level.Owner: Set to default.Main Organization Type(Optional): Select the main organization type, for example,Purchase Organization.Main Organization(Optional): Select the main organization, for example, Purch.Org.1010.Valid From: Add an appropriate start date.Valid To: Add an appropriate end date.Description (Optional): Enter the description if required. |  |  |
| 6 | Categories | Choose Add Category and enter appropriate values:Enter Group Name: Enter for example, Contract Details.Path: Select an appropriate value from value help, for example, IT Hardware.Category: Select an appropriate value from value help. For example, PCs.You can also add one more category by following the above steps. | Under Categories, you see one path - Procurement/IT Hardware. |  |
| 7 | Parties | In the Parties section:Add a new Entity by choosing Create.Make the following entries:Rank: Set to default.Entity Type: Select an appropriate entity type from the dropdown list, for example, Supplier.Name(Optional): Choose the value help in the dialog box that opens, and choose GO. Then select the required value.Required: Checked by default.Main Entity: Checked by default.All the other steps below are optional in Manage Contexts. You can enter the data if required or execute the step 13 directly.Add an Internal Contact by choosing Create.Rank: Set to default.Contact Type: Select an appropriate value from the dropdown list, for example, Purchaser.Name(Optional): Choose the value help in the dialog box that opens, and choose GO. Then select the required value.Required(Optional): Select the checkbox.To add External Contacts, choose Create.Rank: Set to default.Contact Type: Select an appropriate value from the dropdown list, for example, Signer.Name(Optional): Choose the value help in the dialog box that opens, and choose GO. Then select the required value.Required(Optional): Select the checkbox. | Under Entities, now you see Entity Type Supplier and also Purchase Organization, where Supplier is the main entity.Under Internal Contacts, now you see the Contact Type Purchaser.Under External Contacts, now you see the Contact Type Signer. |  |
| 8 | Relationships(Optional) | In the Legal Transactions section, choose Create and make the following entries:Relationship Type: <defined via IMG activity Define Relationship Types, Relationships, and Use Cases>Legal Transaction(Optional): <add the related legal transaction>Required(Optional): <check if the relationship is mandatory>In the Linked Objects section, choose Create and make the following entries:Object Type: Select an appropriate value from the dropdown list, for example, Purchase Order.Required (optional): Select the checkbox.1. With External Linked Objects Integration, the external linked object type and corresponding technical type can be maintained here. Please refer to 1XV Set Up Instrocutions for details.
2. For internal linked object type, please refer to the following picture as an example (WBS Elements) to fill in the parameters.

 |  |  |
| 9 | Life Cycle(Optional) | In the Renewal and Termination section, make the following combination of entries:Renewal Type: Active RenewalRenewal Reminder Recipient(Optional): for example, Administrator\_LcmSend Renewal Reminder(Optional): for example, 30Renewal Period(Optional): for example, 6 MonthsRenewal Clause(Optional): for example, 3 months to contract EndTermination Reminder Recipient(Optional): for example, Administrator\_LcmSend Termination Reminder(Optional): for example, 30Termination Clause(Optional): for example, 1 month to quarter EndOr make the following combination of entries:Renewal Type: Auto RenewalRenewal Period(Optional): for example, 6 MonthsTermination Reminder Recipient(Optional): for example, Administrator\_LcmSend Termination Reminder(Optional): for example, 30Next Termination Clause(Optional): for example, 1 month to quarter EndTermination Clause(Optional): for example, 1 month to quarter EndIn the All Dates section, Start Date and End date are added by default and marked with Required. Choose Add and make the following entries:Date Type: Select an appropriate value from the dropdown list, for example, Start Date or Renewal Date. |  |  |
| 10 | Documents(Optional) | In the Documents section, choose Create to create a new document and make the following entries:Content Type: for example, Master ContractLanguage: for example, EnglishRequired (optional): Select the checkbox. |  |  |
| 11 | Phases(Optional) | In the Phases section, choose Create to create a new phase.On the Phase screen and in the General Information section, make the following entries:Type: for example, NegotiationStarting Condition: for example, ParallelAuto Start: <mark the checkbox if you want the phase start automatically after the legal transaction is created from this context.>In the Completion Criteria section, choose Create and make the following entries:Content Type: for example, Master ContractAction: for example, Content ExistsStamp: for example, ReviewedChoose Apply.1. The sequence number of phases determines the phases that should be processed in order.
 |  |  |
| 12 | Tasks(Optional) | In Steps section, choose Add to create a new step.Alternatively, you can also choose the workflow template by choosing the arrow beside Add and selecting Add Template in the dropdown list. You need to manage the template using the Manage Workflow Templates app.In Header section, make the following entries:Name(Optional): Enter an appropriate value, for example ApprovalType: select the appropriate value from the drop-down list, for example ApprovalIn Step Properties section, make the following entries:Stamp Name (optional): select the appropriate value from the drop-down list, for example Approved.Filter for Custom Step (optional): it can be defined via Self-Service Configuration UI Define Filters for Custom Step.1. The Stamp Name is the document stamp which can be defined via IMG activity Define Document Stamps.
2. The Filter for Custom Step is used within a workflow that contains a custom step task. During the definition of a Workflow Template (Task Group) you must set an appropriate filter ID for your custom step task. This filter will be exposed to the Business Add-In Define Custom Step (LCM\_LT\_WF\_CUSTOM\_STEP).

In Recipients Section, make the following entriesAssignment by: Select User from the drop-down list(or Team defined via app Manage Teams and Responsibilities)User: Select the appropriate value from the value help, for example John legal\_counselStep to be completed by: select One of the recipients or All of the recipientsSubject for Recipients(Optional): Enter an appropriate value, for example Please approve the Legal transactionIn Step Conditions section, make the following entries(Optional):Only start the step if the following preconditions are met: select an appropriate value from the dropdown list, for example, Contains Category.Enter the category name in the dialog box on the right.Choose Add another condition if more conditions are required.Choose Add alternative conditions to define another condition as an alternative.In Deadlines section (optional), choose Add to create a deadline and make the following entries:If step is not completed by: enter the number and select the unit from dropdownlistExecute the following action: Mark step as overdueIn Exception Handling section, the Rejected entry is displayed by default if the Type is Approval in Header section. Make the following entries:Required Action: select the appropriate value from the dropdown list, for example, ReviseAction Result: select the appropriate value from the dropdown list, for example, Repeat Step |  |  |
| 13 | Save | Once you maintain all the required information, choose Save. | Then you can find your Context in the Manage Context app. |  |

## Request Legal Contract

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

It is a wizard that guides through the process of creating a legal Transaction. The number of steps that the wizard uses depends on the items and settings maintained in the context created using the Manage Context app.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori launchpad using business role Employee - Enterprise Contract Management. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the appropriate Fiori app | Open Request Legal Contract (F2403). | The Request Legal Contract screen is displayed. |  |
| 3 | Step 1 - Basic Data | In the Basic Data section, make the following entries:Title: Enter an appropriate title, for example, PCs Germany.Context: Select an appropriate value from value help, for example, Purchasing PCs Germany.Additional Information(Optional): Add the Description, select the Language and the Governing Law if required.Then choose Step 2. | The Step 2 screen is displayed. | To select the one that you have created, Status should be Active. |
| 4 | Step 2 - Categories | In the Categories section, make sure that you verify categories. Choose Add Category to add new entry if required. Then choose Step 3. | Step 3 screen is displayed. |  |
| 5 | Step 3 - Parties | In the Parties section, make sure that you verify Entities, Internal Contacts, and External Contacts. Choose Create Object to add new entry if required. Then choose Step 4. | Step 4 screen is displayed. | For Internal Contacts, Requester is the default value. |
| 6 | Step 4 - Relationships(if available) | In the Relationships section, make sure that you verify the information. Choose Create Object to add new entry if required. Then choose Step 5. |  |  |
| 7 | Step 5 - Documents | In the Documents section, the documents created in Context are displayed. You can upload the files if required. Choose Review. |  | Start Date or Renewal Date should be marked as Required by choosing Yes. |
| 8 | Submit | Choose Submit. | The Manage Legal Transaction page is displayed. |  |

## Manage Legal Transactions

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

A legal transaction is an object to group legal contents, which have to be processed in a specific way. It provides different user roles with access to relevant information about the legal content. This includes Status, Categories, Parties, Dates, Tasks, Linked Objects, Documents and so on.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori launchpad using business role Legal Counsel. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the appropriate Fiori app | Open Manage Legal Transactions (F2310). | The Manage Legal Transaction screen is displayed. |  |
| 3 | Manage Legal Transactions | Choose the relevant Legal Transaction from the table below it. | You are in the Legal Transaction page now. To edit Legal Transaction, choose Edit on the top right.You can also use the Enterprise Search functionality to search your legal transaction:* Choose Search in the upper right area of the launchpad
* In the dropdown list choose: Legal Transactions and input Transaction Number from previous section.
* Now you are able to see the details of the Legal transaction.
 |  |
| 4 | Relationships(Optional) | In the Legal Transaction section, check or maintain the entries inherited from the con-text if exists. You can also choose Add to add a new relationship.In the Linked Objects section, if there is an entry inherited from the context, make the following entries:Object Type: <Inherited from the context>Linked Object ID: <Enter a document number or search from F4 help>You can also choose Add to add a new relationship.1. You can only maintain the Linked Object ID when you have the corresponding authorization. For example, the role SAP\_BR\_PURCHASER is required for Purchase Order and Purchase Contract, and the role SAP\_BR\_RECM\_SPECIALIST is required for Request for Quotation (RFQ).2. For the pre-delivered linked object types, some of them can be navigated to the management application. For example, if a Purchase Contract, Request for Quotation, Real Estate Contract (additional license is required), Central Purchase Contract (additional license is required) or Sales Contract is maintained as linked object, the hyperlink of the document number can navigate to the corresponding app, e.g. Manage Purchase Contract. | The relationships are defined. |  |
| 5 | Reminders(Optional) | In the Reminders section, make the following entries:To add Reminders, choose Add.Reminder Type: Select an appropriate value from the dropdown list, for example Reminder.Subject: Enter an appropriate value, for example Reminder to get signature.Date:Enter an appropriate date, for example <today + 30 days>.Recipient::Select an appropriate value from value help, for example John employeelegalcontent. | The reminders are defined. |  |
| 6 | Task Group Templates(Optional) | In the Tasks section, choose the Task Group Templates section, choose Create and make the following entries:Task Group: for example, Task Group 1Choose the task group item. The Task Groups screen is displayed.Choose Workflow section and then choose Add.In Header section, make the following entries:Name(Optional): Enter an appropriate value, for example ApprovalType: select the appropriate value from the drop-down list, for example ApprovalOn the Recipients tab, make the following entries:Assignment By: Select User from the drop-down list(or Role)User: Select the appropriate value from the value help, for example John employeelegalcontentStep to be completed by: Select One of the recipients or All of the recipientsSubject for Recipients(Optional): Enter an appropriate value, for example Please approve the Legal transactionChoose Add to save the step.Repeat the steps above to add more steps.Choose Apply to save the task group. | The tasks are defined. |  |
| 7 | Tasks - Task Groups in Progress(Optional) | In the Tasks sections, choose Task Groups in Progresstab, choose Start Default Workflow.The Start Task Group screen is displayed. The existing legal document can be attached to the task if required.Choose Start to save the task. | The tasks defined in the context are displayed.The tasks defined in groups will also be listed here. |  |
| 8 | Documents(Optional) | In the Documents section, make the following entries:To add Documents, choose Upload File. The Upload File screen will be displayed.Make the following entries:Content Type: Select an appropriate value from the dropdown list, for example Master Contract.Access Level (optional): for example, PrivateLanguage: Select an appropriate value from the dropdown list, for example English.Governing Law: <read-only and inherited from the legal transaction>File: Choose Browse to upload the file from your computerChoose Upload.If the set-up instruction is completed and the Integration Scenario SAP\_COM\_0518 is configured, the Legal Document can be sent for e-Signature.In the Documents section, select the checkbox of a Legal Document and choose Send for e-Sign in the upper right corner.On the Select Template screen, choose one of the templates and choose Next.On the Select Roles screen, enter the Signer or other data and choose Send.The template can be created and managed on DocuSign website. You can refer to the [Support Document](https://support.docusign.com/guides/ndse-user-guide-working-with-templates?source=demo). | The document is attached to the legal transaction. |  |
| 9 | Phases (Optional) | Review the obligations maintained for legal transaction if available.Choose Start to start the phase with not completed status.1. The phase with Auto-Start enabled will start automatically once the legal transaction is created, and the status will be In Progress.2. For the phases are defined with Starting Condition: Parallel, it does not have any impact if not all phases are completed finally. But for the phases are defined with Starting Condition: Sequential, they must be completed one by one, the next one can not be started if the previous one is not completed.3. With the pre-delivered situation type, a notification is sent to the predefined recipients when the status of the phase is changed from Completed to Completed (Revision Needed). | The phases are reviewed or started. |  |
| 10 | Obligations (Optional) | Review the obligations maintained for legal document if available. | The obligations are reviewed. |  |
| 11 | e-Signature Envelops (Optional) | Review the e-Signature envelops for legal document if available, and the open ones can be cancelled here before completed. | The e-Signature envelops are reviewed. |  |
| 12 | Notes (Optional) | Any note, comment or additional information can be added here. | The notes are added. |  |
| 13 | Save | Once you maintain all the information, choose Save. |  |  |

## Approve Legal Transactions (Optional)

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

It is a wizard that guides you through the process of approving a Legal Transaction with the business workflow.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori launchpad using business role Employee - Enterprise Contract Management. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open My Inbox - All Items (F0862) | The My Inbox screen is displayed. |  |
| 3 | Open Notification | On My Inbox screen, choose the appropriate notification. For example, the subject is Process Legal Transaction 100000XXXX <subject of the legal transaction>. | The detailed info of notification is displayed. |  |
| 4 | Approve Legal Transaction | Choose Complete on the lower right corner of the screen. Enter the note if required, then choose Submit. | The legal transaction is approved. |  |

## Manage Legal Documents

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

A legal document is an object that contains the legal contracts or other documents. The Manage Documents app can manage the legal documents centrally.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori launchpad using business role Legal Counsel. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Manage Legal Documents (F2453) | The Manage Legal Documents screen is displayed. |  |
| 3 | Manage Legal Documents | Choose relevant Legal Document from below table | Now you are inside Legal Document. To edit Legal Document, choose Edit on top right corner.You can also use the Enterprise Search functionality to search your Legal document:* Choose Search in the upper right area of the launchpad.
* In the dropdown list choose: Legal Documents and input Document Number from previous section.

Now you are able to see the details of the Legal document. |  |
| 4 | Stamps | In Stamps Section, make entries and choose Add.Stamp Name: select appropriate from drop down, for example Accepted.Date, Time: Set to defaultAdded By: Set to defaultChoose Save | Then it navigates to Legal Document. |  |
| 5 | Edit the document(Optional) | Choose Edit on the upper right corner to change the content of the document.Choose Check Out to lock the attached document.Download the file and edit the file offline.Choose Check In and upload the modified file to release the new version.Choose one of the following options in the Check In dialog box when uploading the file:Confirm check-in and create a new versionConfirm check-in and replace current version | The legal document is modified.If you choose the option Confirm check-in and create a new version, the old version of the legal document will be created as version 1 in Version History and the new version will be version 2. |  |
| 6 | Save | Once you maintain this information, choose Save |  |  |

## Manage Legal Tasks

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

With the Manage Documents app, you can manage tasks that are linked to different legal transactions, forward tasks to other agents, and notify agents about pending tasks. You can see all the tasks grouped under the legal transaction from where these workflow tasks were triggered. You can filter the tasks based on task types and agent roles, in addition to all the other common filter types.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori launchpad using business role Legal Counsel. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Manage Legal Tasks (F2304). | The Manage Legal Task screen is displayed. |  |
| 3 | Manage Legal Tasks | Choose relevant Legal Task from the table below with the status Ready, Waiting or Accepted. | Now you are inside Task. |  |
| 4 | Forward the Task | Choose Forward on the upper right corner. The Forward screen is displayed.Make the following entries:To: <Enter the recipient or search from F4 help>Note: <Enter a note for the forwarding>Choose OK. | The legal task is forwarded, and the recipient will replace all users in the Agentssection on the Task screen. |  |
| 5 | Check the Forwarded Task in My Inbox app (Optional) | Log on to the SAP Fiori launchpad with the user of the recipient and open My Inbox - All ItemsOn My Inbox screen, choose the appropriate task. | The detailed info of task is displayed, and the following-up action can be taken. |  |
| 6 | Send the Notification | Choose Notify on the upper right corner. The Notify screen is displayed.Make the following entries:To: <The recipient will be displayed by default>Note: <Enter the content of the notification>Choose OK. The message Notification has been sent is displayed. | The notification is sent to the recipients of the Agents. |  |
| 7 | Check the Notification in My Inbox app (Optional) | Log on to the SAP Fiori launchpad with the user of the recipient and open My Inbox - All Items.On My Inbox screen, choose the appropriate task.On Comments tab, the notification is displayed. | The detailed info of notification is displayed, and the following-up action can be taken. |  |

## Check Enterprise Contract Management Overview

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | Duration | Enter a duration. |

Purpose

* You can view the overall status of all CM objects including contexts, documents and legal transactions.
* You can filter the context or main entity to view the status of the corresponding context, document and legal transaction.
* With the tiles of this app, you can view the context expiring soon, legal transactions at risk, total document status, total document stamps, total legal transactions health, total context status, upcoming dates, upcoming reminders, open documents, signed and accepted documents.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on to the SAP Fiori launchpad using business role Legal Counsel. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access Appropriate Fiori App | Open Enterprise Contract Management Overview (F2933) | The Enterprise Contract Management Overview screen is displayed. |  |
| 3 | Total Legal Transaction Status | Choose Total Legal Transaction Status to display all legal transactions, or choose the status category in the chart below to display the legal transactions with different status. | The Manage Legal Transactions screen is displayed. |  |
| 4 | Context Status | Choose Context Status to display all contexts, or choose the status category in the chart below to display the contexts with different status. | The Manage Contexts screen is displayed. |  |
| 5 | Context Expired Soon | Choose Context Expired Soon to display all contexts, or choose the item in the list below to display the individual context which will be expired soon. | The Manage Contexts screen is displayed. |  |
| 6 | Legal Transactions with Open Issues | Choose Legal Transactions with Open Issues to display all legal transactions or choose the item in the list below to display the individual legal transaction which has some open issues. | The Manage Legal Transactions screen is displayed. |  |
| 7 | Document Stamps | Choose Document Stamps to display all legal documents or choose the stamp category in the chart below to display the legal documents with different stamp. | The Manage Legal Documents screen is displayed. |  |
| 8 | Document Status | Choose Document Status to display all legal documents or choose the status category in the chart below to display the legal documents with different status. | The Manage Legal Documents screen is displayed. |  |
| 9 | Average Document Creation Time | Choose Average Document Creation Time to display all legal transactions or choose the dot in the chart below to display the legal transactions created this year. | The Manage Legal Transactions screen is displayed. |  |
| 10 | Average Documents Finalization Time | Choose Average Document Finalization Time to display all legal transactions or choose the dot in the chart below to display the legal transactions finalized this year. | The Manage Legal Transactions screen is displayed. |  |
| 11 | Upcoming Dates | Choose Upcoming Dates to display all legal transactions or choose the item in the list below to display the individual legal transaction with the earliest termination date. | The Manage Legal Transactions screen is displayed. |  |
| 12 | Upcoming Reminders | Choose At Risk Legal Transactions to display all legal transactions or choose the item in the list below to display the individual legal transaction with the earliest reminder.The dropdown list can be used to filter the reminder type. | The Manage Legal Transactions screen is displayed. |  |
| 13 | Open Documents | Choose Open Documents or View All to display all open documents or choose the <number>of <number> button on the right to get the list of open documents. | The Manage Legal Documents screen is displayed. |  |
| 14 | Signed and Accepted Documents | Choose Signed and Accepted Documents to display all signed and accepted documents or choose the item in the list below to display the individual document which is signed or accepted. | The Manage Legal Documents screen is displayed. |  |
| 15 | Average Task Processing Time | Choose Average Task Processing Time to display all legal documents or choose the dot in the chart below to display the legal tasks with Completed status this year. | The Manage Legal Tasks screen is displayed. |  |
| 16 | Pending Tasks of My Legal Transactions | Choose Pending Tasks of My Transactions to display all legal documents or choose the dot in the chart below to display the legal tasks with Ready or Waiting status. | The Manage Legal Tasks screen is displayed. |  |
| 17 | Task Completion | Choose Task Completion to display all legal documents or choose the dot in the chart below to display the legal tasks with Completed status this year. | The Manage Legal Tasks screen is displayed. |  |

Typographic Conventions

|  |  |
| --- | --- |
| Type Style | Description |
| Example | Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options.Textual cross-references to other documents. |
| Example | Emphasized words or expressions. |
| EXAMPLE | Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE. |
| Example | Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools. |
| Example | Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation. |
| <Example> | Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system. |
| EXAMPLE | Keys on the keyboard, for example, F2 or ENTER. |

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