



**PENHALLOW ASSOCIATES LIMITED**  
**A Financial Knowledge Company**



## **Contract Management Systems**

**Virtual Learning or Classroom Training**

**Duration: 2 Hours.**

**Course Price: On Request**

**Location: (UK) For Virtual Learning Live Environment via Video Communication. *To book, or, require more information. Please contact Alan Penhallow; e-mail: [alan@tflonline.co.uk](mailto:alan@tflonline.co.uk)***

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***This programme may be of interest to your colleagues.***

**[www.penassco.co.uk](http://www.penassco.co.uk)**

### **Course Overview**

Creating, negotiating and managing contracts are an essential part of any business, regardless of its size. Contract management is an intricate oversight process that follows contracts from pre-award to completion, including execution, vendor selection, issue detection and control, tracking and processing.

Contract Management Solutions can incorporate clause libraries, repositories filled with standardized template clauses that have been pre-constructed and pre-approved typically by general counsels in the legal department of a company and by partners in a law firm thus reducing reliance on the Legal Department during contract negotiation. When implemented properly, contract management processes ensure that budgets and abilities are in alignment with project objectives.

## **Program 1**

- Using a website framework for Contract Management within Micro Organisations:
  - Django
  - React, Angular, JQuery, VueJS, EmberJS
  - WordPress
- How to Build a Document Management System (DMS) in SharePoint:
  - Defining contract meta data
  - Creating contract content types in SharePoint
  - Creating contract meta data in SharePoint
  - Prepare your document library for custom content types and custom metadata
  - Upload documents and customise view

## **Program 2**

- Managing a Document Management System (DMS) in SharePoint:
  - Creating Alerts
  - Request sign-off
  - Set reminders
  - Create and manage rules
- 3<sup>rd</sup> Party Vendor Contract Management Systems:
  - Contract Workflow
  - Store and Track documents
  - Clause Libraries

## **Learning Outcomes**

- Understand who needs a contract management system and why?
- Know how to use a website framework for Contract Management within Micro Organisations
- Know how to Build a Document Management System (DMS) in SharePoint
- Know how to use a 3<sup>rd</sup> party vendor contract management system

## Trainer Profile



### **Malcolm Gloyer**

Malcolm Gloyer, Chartered Member of the Chartered Institute for Securities and Investments, explains some solutions to the challenges of contract management. As a Certified Practicing Project Manager (CPPM MAIPM), Malcolm has more than 30 years' experience working on projects in the UK and Australia, specializing in data strategy, market and credit risk, derivatives, commodities and artificial intelligence. Malcolm has worked as a consultant at companies including Bank of America Merrill Lynch, London Metal Exchange, Nomura, ABN Amro, BNP Paribas, Santander and Lloyds Bank and has been a guest lecturer at the University of Aberdeen, London School of Economics and James Cook University in Australia. Malcolm has had articles published in professional investment magazines and has written several eBooks on risk management, green finance and luxury asset valuation.

[www.linkedin.com/in/malcolm-gloyer-b0812515/](http://www.linkedin.com/in/malcolm-gloyer-b0812515/)

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