

Contract Management

User Guide

V1.0

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Revision History

Version	Date	Author	Comments
1.01	09/05/2019	Pippa Robertson	Initial Draft

1 Introduction

This Full Guide has been compiled for the Contract Management System. For a short introduction to the key tools, see the Quick Guide to Key Contract Management Tools Guide on the Procurement & Commercial Services Webpages.

2 Getting started – Accessing the system

Access

If you do not already have an account, you will need to complete the Request for Access form and send this to contact **rt-finance-servicedesk@sussex.ac.uk**. The form can be found on the Procurement and Commercial Services page here:

Web address Link

Please paste the following link into your browser, and save to your bookmarks

<https://www.proactisplaza.com/BuyerPortal/> Before using the system, please make sure pop-ups are enabled in your browser. The system operates most efficiently on Google Chrome.

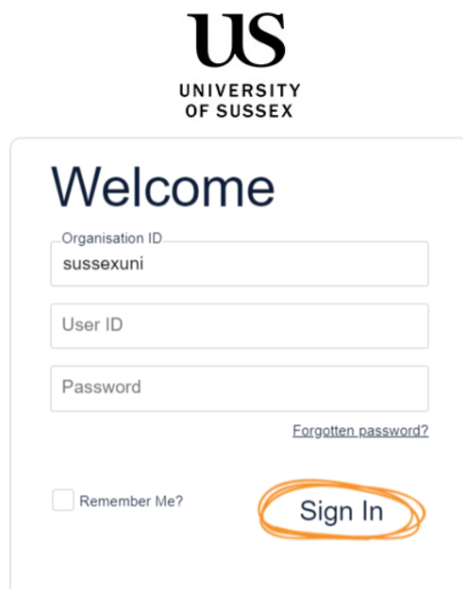
Training and Assistance

Please contact **rt-finance-servicedesk@sussex.ac.uk** who will direct your request.

Initial training on the system will be carried out by Procurement & Commercial Services. Systems queries or issues are handled by the Finance Service Desk directly.

To login to The Contract Management System...

1. Type the Web Address into the Web Browser. The following page will be displayed...



US
UNIVERSITY
OF SUSSEX

Welcome

Organisation ID
sussexuni

User ID

Password

[Forgotten password?](#)

☐ Remember Me?

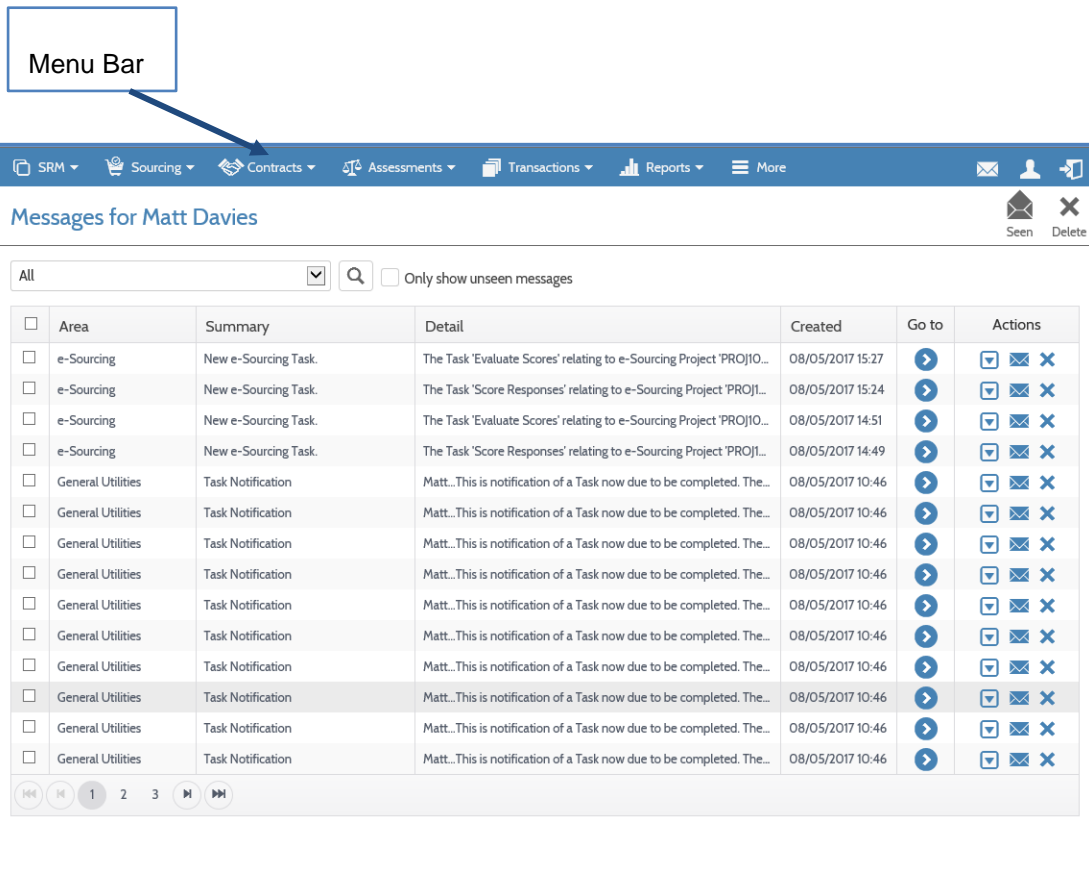
Sign In

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Version 19.2.0

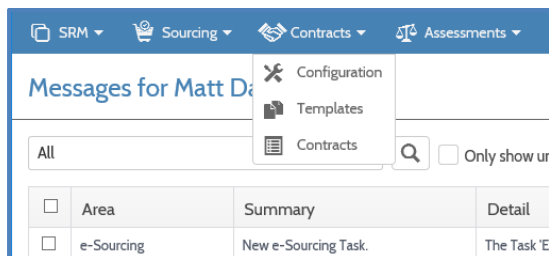


2. Insert your Organisation ID (Sussexuni), User Name and Password. If you have trouble logging in, please contact **rt-finance-servicedesk@sussex.ac.uk**. NOTE: if you tick the checkbox for “Save login details” the Organisation ID and User Name will be remembered on the PC being used.

Click **Sign In**. The following will be displayed:



Once logged into The Contract Management System, click on the **Contracts** Menu Bar option as shown below...



The next section of this User Guide explains what access permissions are available for Contract Management

3 Access Permissions for Contract Management

System Access

Responsibility for access to contracts rests with the Senior Responsible Officer for each contract. Unless otherwise specified in the contract governance structure, this will default to Heads of School/Directors of Professional Services. The University's Contract Access Form must be completed, signed by the relevant Responsible Officer/Head of School/Director of Professional Service, and submitted to the finance Service Desk in order to gain access to the Contract Management System. The Access Request Form can be found on the Procurement & Commercial Services pages within the Contract Management section.

Available Access Levels:

- **Executive:** Full Access to all University contracts
- **Procurement & OCG:** Full Access to all University contracts
- **Contract Manager:** Full Access to School/Division portfolio of contracts, basic access to all university contracts where appropriate
- **Default Access:** Available to all staff. Full access to a basic level of information, for contracts that are intended for University-wide use.

Only those persons who strictly require access to contracts to complete duties should be given full access to contracts across the University or at School/Division level. The level of access granted to contracts on the Contract Management System is to be appropriate to the role of the staff member. Access to edit contracts should only be given to those acting in a Contract Management capacity, read-only access can be given to those who require access to certain contract information, if approved by the Head of School/Director of Professional Service.

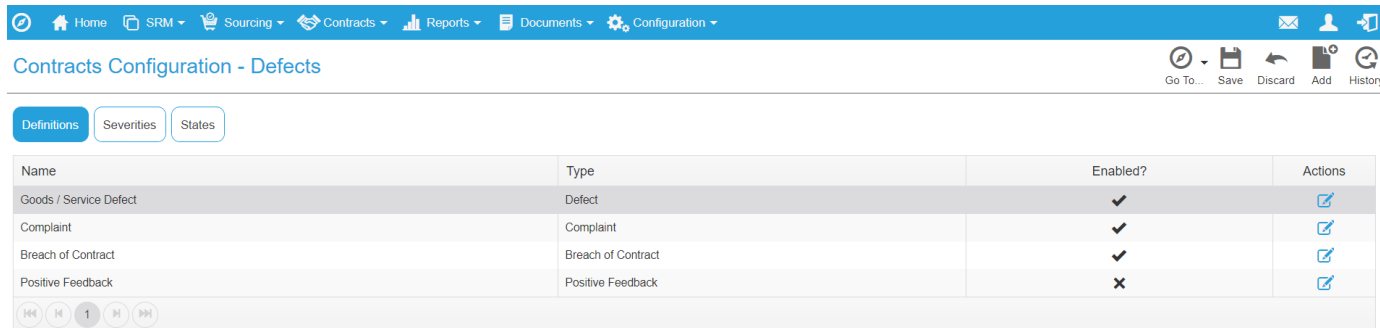
3.1 Contract Statuses

Contracts Configuration - Contract Statuses			
Code	Name	Enabled?	Actions
DRFT	Draft	✓	
BAPR	Being Approved	✓	
RJCT	Rejected	✓	
CNCL	Cancelled	✓	
APPR	Approved	✓	
WAIT	Statutory Waiting Period	✓	
ACTV	Active	✓	
SUSP	Suspended	✓	
COMP	Completed	✓	

A Contract's Status will change over time from its initial draft through to the contract being completed. The Contract Management Module has pre-determined Statuses that are invoked automatically depending on what action has been performed on the contract.

3.2 Defects

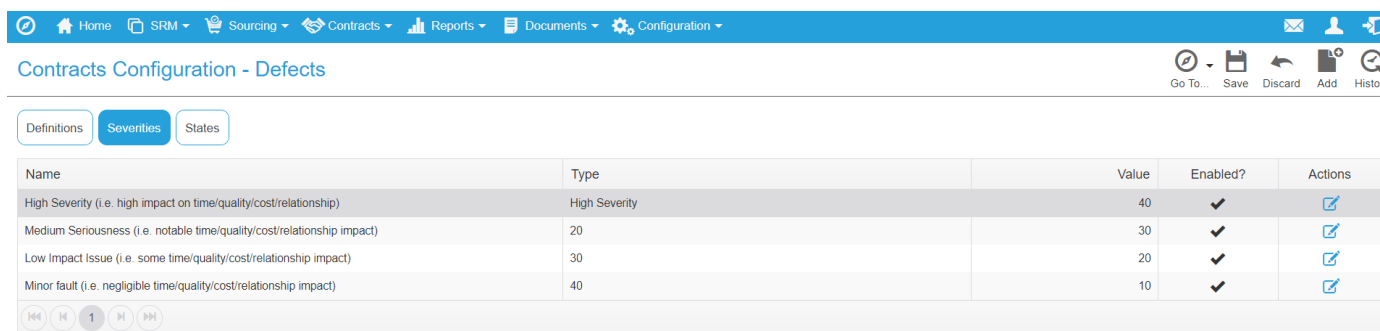
Contract Defects and associated severities are pre-defined, and can be utilised on a per contract basis where required. Defect Severities can be utilised in Contract Tasks to base an event around so that for example if a supplier scores more than a particular point set the supplier or whole contract could be suspended. The Defects will be pre-configured as follows...



The screenshot shows the 'Contracts Configuration - Defects' interface. It has tabs for 'Definitions', 'Severities', and 'States'. The 'Definitions' tab is active, displaying a table with the following data:

Name	Type	Enabled?	Actions
Goods / Service Defect	Defect	✓	Edit
Complaint	Complaint	✓	Edit
Breach of Contract	Breach of Contract	✓	Edit
Positive Feedback	Positive Feedback	✗	Edit

The **Severities** Tab when accessed will be displayed as follows...

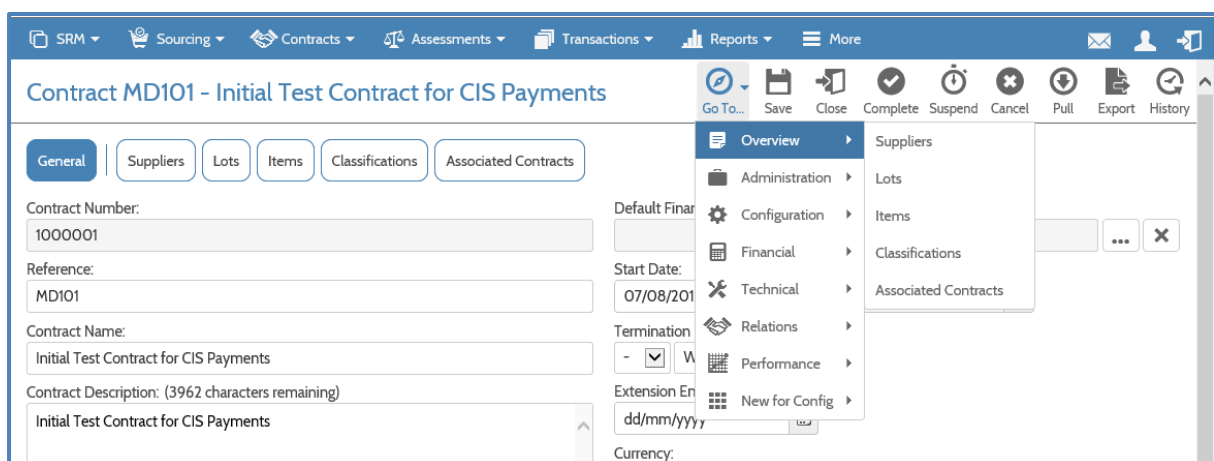


The screenshot shows the 'Contracts Configuration - Defects' interface with the 'Severities' tab active. It displays a table with the following data:

Name	Type	Value	Enabled?	Actions
High Severity (i.e. high impact on time/quality/cost/relationship)	High Severity	40	✓	Edit
Medium Seriousness (i.e. notable time/quality/cost/relationship impact)		30	✓	Edit
Low Impact Issue (i.e. some time/quality/cost/relationship impact)		20	✓	Edit
Minor fault (i.e. negligible time/quality/cost/relationship impact)		10	✓	Edit

3.2.1 Introduction to Tab

Here is an example screen shot from a Contract record to demonstrate the Tab Group...



The screenshot shows a contract record for 'Contract MD101 - Initial Test Contract for CIS Payments'. The 'General' tab is active. The 'Go To' button is highlighted, and its dropdown menu is open, showing a list of Tab Groups and their associated Tabs:

- Overview
 - Suppliers
 - Lots
 - Items
 - Classifications
 - Associated Contracts
- Administration
 -
- Configuration
 -
- Financial
 -
- Technical
 -
- Relations
 -
- Performance
 -
- New for Config
 -

As shown the **Go To** button opens a list of Tab Groups and a specific Tab can be selected from the sub-menu. In which case this is the result...

The screenshot displays the 'Contract MD101 - Initial Test Contract for CIS Payments' form. The interface includes a top navigation bar with tabs for SRM, Sourcing, Contracts, Assessments, Transactions, Reports, and More. Below this, a secondary bar contains action buttons: Go To..., Save, Close, Complete, Suspend, Cancel, Pull, Export, and History. The main form area has a tab group with 'General' selected, and other tabs for Suppliers, Lots, Items, Classifications, and Associated Contracts. The 'General' tab contains the following fields:

- Contract Number:** 1000001
- Reference:** MD101
- Contract Name:** Initial Test Contract for CIS Payments
- Contract Description:** (3962 characters remaining) Initial Test Contract for CIS Payments
- Contract Template:** Standard Template - no Output
- Contract Type:** Standard Contract (selected)
- Status:** Active
- Created By/Date:** Matt Davies, 07/08/2015
- Default Finance Code:** (empty)
- Start Date:** 07/08/2015
- End Date:** dd/mm/yyyy
- Termination Notice Period:** - Working Day(s)
- Extension End Date:** dd/mm/yyyy
- Currency:** GBP
- Estimated Value:** (empty)
- Total Successful Bid Value:** 20,000.00
- Projected Contract Value:** 20,000.00
- Order Total Value:** 0.00
- Invoice Total Value:** 0.00
- Outstanding Value:** 0.00

In the screen shot above the Tabs linked to the Tab Group are displayed and can be navigated between (General, Suppliers, Lots, Items, Classifications, and Associated Contracts)

3.3 Contract Management System Messages

There are a series of system-generated emails/messages. Some of these can be switched off at template (school/division) level. Contact the Finance Service Desk with settings requests.

The Contract Management Messages are labelled...

- **Notifications of Contract Activation** – Sent to contract manager(s) when a contract is activated.
- **Notifications of Contracts ready to be activated** – Sent to anyone who has the role to activate contracts when a contract has been awarded to suppliers
- **Requests to approve draft Contracts** – Sent to anyone who has the role to approve contracts when a contract is submitted for approval
- **Notification of Contracts ready to be awarded** – Sent to anyone who has the role to award suppliers when a contract is approved
- **Notifications of new Buyer Dialogue in Contracts** – sent to suppliers that are linked to a contract that is published on the Supplier Portal when a buyer user generates a public or individual dialogue
- **Notifications of new Supplier Dialogue in Contracts** – sent to a buyer user when a supplier adds a message/dialogue against a Portal available contract.

- **Requests to approve Variations** – sent to users who have the permission to approve variations on a contract.

4 Contract Templates

Contract Templates (created on a school/division basis) are used to set the default behaviour, permissions and data available for contracts. Keeping template data uniform is a good way for the University to bring a level of consistency in the way contracts are created and maintained.

Contract Templates created will inherit the settings set at Contract Management Configuration Level (Module level) but can be changed if strictly required for each contract template created at point of creation. New data can be added to drop-down lists at any time thereafter, but new reference fields cannot be added at a later date.

4.1.1 Tasks

Title	Assigned To	Scheduled Date	Status	Actions
No Tasks have been added.				

Tasks can be attached to Contract Templates that will be used for the relevant contracts created for each Contract Template, for notification of when the commercial insurance expires or supplier review meetings may be generic across a range of contracts.

Tasks are defined by selecting an Event and an Action

An Event can be:

- A Timed Event e.g. execute this task on the 3rd day of every month
- A System Event e.g. A supplier has been suspended or a document has expired

An Action can be:

- A Message – e.g. Send an email to the Contract Manager
- A Manual Task – e.g. Hold a meeting and confirm when you have attached the minutes to the contract.
- A System Action e.g. Suspend a Supplier on a Contract

Note that manual tasks can be assigned to User Groups or Users e.g. the Contract Manager. However, it is also possible to assign to the supplier in certain scenarios e.g. following a meeting the supplier has to perform certain “actions”.

Tasks can also have Notifications:

- Notification to a user or user group (that is sent on the day the task is due/scheduled)
- Reminder – send a message every 3 days until the Task is done
- Advanced Notice – send a message 7 days before the event occurs

Tasks can be created to run at Contract level or at Contract Supplier level though it is not possible to choose a partial list of suppliers to execute the task on.

To Add a Task...

1. Click **Add**. An “Add Task Wizard” will be displayed

2. Enter a Title, Description and select an Event Type from the drop down. These can be Scheduled, Repeat Scheduled, Contract End, Contract Start, Supplier Defect Limit, Document Expiry:

Event Type	Description
Scheduled	Triggers the event at the given date. Attributes such as Date Field will be available to set.
Contract End	Triggers the event based on the scheduled end-date for a contract. Attributes such as Days Before will be available to set.
Contract Start	Triggers the event based on the scheduled start-date for a contract. Attributes such as Days Before will be available to set.
Document Expiry	Triggers the event based on the expiry of a document associated with a contract. Attributes such as Date Field and Document drop-down will be available to set.
Supplier Defect Limit	Triggers the event based on a certain number of Defect Points being scored either by an individual Supplier or All Suppliers

3. Select the Action Type. These can be None, Manual Task, Activate the contract, Suspend the contract, Suspend the supplier from the contract. Select one then Click **Next**

Action Type	Description
Notification Only	Sends a notification of the Event but does not require an action to be performed in the System
Request Manual Action	Requires that an assignee perform a manual task, and confirm when it has been completed.
Activate the contract	Activates the contract when this task is triggered.
Suspend the contract	Suspends the contract when this task is triggered.
Suspend the supplier from the contract	Suspends the supplier from this contract when this task is triggered.

4. Once these have been set, click "Next"
5. The next page will provide relevant Event Type based options. Each Event Type and option is displayed below:

Scheduled:

Add Task Wizard

Task Event Attributes

Please enter the event details.

Event Type:
Scheduled

Attribute	Data
Date	11/05/2017

< Back Next > Cancel

Here a specific date can be set for the Event to Occur

Repeat Scheduled:

Add Task Wizard

Task Event Attributes

Please enter the event details.

Event Type:
Repeat Scheduled

Attribute	Data
Date	11/05/2017
Interval	7
Interval Type	Days <input checked="" type="checkbox"/>

< Back Next > Cancel

6. Here a specific date can be determined as a start point for the initial event and an interval and type can be determined for subsequent events to occur

Contract Start:

Add Task Wizard

Task Event Attributes

Please enter the event details.

Event Type:

Contract Start

Attribute	Data
Days Before	0

< Back

Next >

Cancel

Here the number of days before the Contract Start date will trigger an event

Contract End:

Add Task Wizard [X]

Task Event Attributes

Please enter the event details.

Event Type:
Contract End

Attribute	Data
Days Before	0

< Back Next > Cancel

Here the number of days before the Contract End date will trigger an event

Supplier Defect Limit:

Add Task Wizard [X]

Task Event Attributes

Please enter the event details.

Event Type:
Supplier Defect Limit

Attribute	Data
Defect Points Limit	0
Supplier	All Suppliers [v]

< Back Next > Cancel

Here the number of Defect Points accumulated can be set for all Suppliers to trigger an event

Document Expiry:

Add Task Wizard [X]

Task Event Attributes

Please enter the event details.

Event Type:
Document Expiry

Attribute	Data
Document	Corporate Standard Terms and Conditions [v]
Days Before	0

< Back Next > Cancel

Here if Documents have been added to the Template that have an Expiry Date set for the Document Type the Document can be selected and the number of days prior to the Expiry set to trigger an event

It is important to note that further options will display within the same page as displayed above based on the “Action Type” of “Request Manual Action”. The above displays the “Notification Only” option, and will be the same for the remaining Action Types. The “Request Manual Action” option is displayed below:

Request Manual Action:

The screenshot shows the 'Add Task Wizard' dialog box with the title 'Task Event & Action Attributes'. Below the title is the instruction 'Please enter the event/action details.' The 'Event Type' is set to 'Scheduled'. Below this is a table with two columns: 'Attribute' and 'Data'. The first row has 'Date' as the attribute and '11/05/2017' as the data. The 'Action Type' is set to 'Request Manual Action'. Below this is another table with 'Attribute' and 'Data' columns. The first row has 'Description' as the attribute and an empty text area as the data. At the bottom of the dialog are three buttons: '< Back', 'Next >', and 'Cancel'.

Attribute	Data
Date	11/05/2017

Attribute	Data
Description	

Here the Description set will be the text displayed to the User Assigned the Task to explain what needs to be done.

Once the above has been configured click "Next"

7. The next page will allow Notifications to be determined. Further, if the "Action Type" has been set to "Request Manual Action" an "Assignees" option displays:

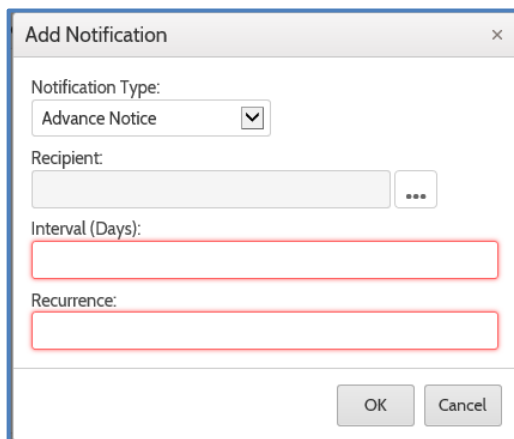
The screenshot shows the 'Add Task Wizard' dialog box with the title 'Task Assignee & Notifications'. Below the title is the instruction 'Please select a user/group the task should be assigned to and add any notifications that you require to be sent.' The 'Assignee' field is empty with a dropdown arrow. Below this is a table with five columns: 'Notification Type', 'Recipient', 'Interval (Days)', 'Recurrence', and 'Actions'. The table is currently empty, and a message 'There are no notifications set for this task.' is displayed in the center. At the bottom of the table area are four circular icons and an 'Add' button. At the bottom of the dialog are three buttons: '< Back', 'Next >', and 'Cancel'.

Notification Type	Recipient	Interval (Days)	Recurrence	Actions
-------------------	-----------	-----------------	------------	---------

The Assignees functionality will allow for users/user groups to be added and when the Task is triggered the Users will be expected to perform the specific action detailed and confirm when the Action has been completed.

Click **Add** and a Notification Type can be set along with Recipient, Reminder Days and Reminder Times. Notifications can (and generally should) include the Assignees and any other users that just require the trigger of the task as a notification

- Notification Type – can be set to:
 - Advance Notice (can determine Interval and Recurrence as below – these are used)
 - On Scheduled Date
 - Reminder (can determine Interval and Recurrence as below)
- Recipient – can set User/User group
- Interval (days) – this is how many days apart each notification is set (For Advance Notices this is before the event occurs and for Reminders will be after the Event has been triggered)
- Recurrence – this is the number of times the Notification should be triggered



8. Once the configuration has been defined, click “Next”. A summary of the task will be displayed with an opportunity to go back and revise the settings or click **Finish** to store the settings.

Add Task Wizard

Task Details Confirmation

Please confirm the details before creating the task.

Task Title:
Verify Contract Details

Task Description:
Verify Contract Details

Event Description:
Triggers the event when the contract is scheduled to start.

Action Description:
This is an action to check the details of the Contract 10 days prior to it starting to ensure the legal elements have been covered. Please Confirm by Completing the Task Issued

Assigned To:
Matt Davies

Scheduled Date:
N/A

< Back Finish Cancel

Once the Task is added the tab will display as follows...

SRM Sourcing Contracts Assessments Transactions Reports More

Contract Template Contract Template for User Guide - Contract Template...


Save Close Push Pull Delete History


General Documents **Tasks** Settings Tab Groups Reference Fields Roles Access Rules Adapters Export Templates

Title	Assigned To	Scheduled Date	Status	Actions
Verify Contract Details	Matt Davies	N/A	Active	

Add

Click on the  icon to open the Task

Click on the  icon to amend Task Details

Click on the  icon to remove the Task

Remember to click **SAVE** to save any changes made

4.1.2 Reference Fields

Specific data reference fields can be added when a template is created. Must be requested at point of template creation for the school/division.

5 Maintaining Contracts

5.1 Accessing Contract Management

Contracts are visible from “Contracts” within the Contracts Menu Bar option:

The screenshot shows the top navigation bar with the 'Contracts' menu item selected. A dropdown menu is open, showing options: Configuration, Templates, and Contracts. Below the menu, there is a message list titled 'Messages for Matt D...'. The list has columns: Area, Summary, Detail, Created, Go to, and Actions. Two messages are visible:

Area	Summary	Detail	Created	Go to	Actions
General Utilities	Task Notification	Matt...This is notification of a Task now due to be completed...	10/05/2017 00:01	[arrow]	[checkbox] [envelope] [X]
e-Sourcing	New e-Sourcing Task.	The Task 'Evaluate Scores' relating to e-Sourcing Project 'PRO...	08/05/2017 15:27	[arrow]	[checkbox] [envelope] [X]

Once selected, the list of contracts that the user has access to is presented:

The screenshot shows the 'Contracts' page. At the top, there is a search bar with 'Search where:' and 'Contains:' labels. Below the search bar, there is a table of contracts. The table has columns: Contract No., Reference, Name, Supplier, Type, and Status. The table contains 18 rows of contract data. At the bottom of the table, there is a pagination bar showing page 5 of 9.


Contract No.	Reference	Name	Supplier	Type	Status
1000073	EREQ1000080	Min COMpe for DPS - Associated Contracts...	ABC Ltd	Standard Contract	Active
1000072	EREQ1000080	Min COMpe for DPS - Associated Contracts...	DMD Enterprises	Standard Contract	Active
1000071	EREQ1000080	Min COMpe for DPS - Associated Contracts...	DMD 123	Standard Contract	Active
1000070	EREQ1000062	contract4 - Lot 4	ABC Ltd	DPS	Approved
1000069	EREQ1000062	contract4 - Lot 3	ABC Ltd	DPS	Draft
1000068	EREQ1000062	contract4 - Lot 2	ABC Ltd	DPS	Draft
1000067	EREQ1000062	contract4 - Lot 1	ABC Ltd	DPS	Draft
1000066	EREQ1000061	contract 3 - Lot 4	ABC Ltd	DPS	Draft
1000065	EREQ1000061	contract 3 - Lot 3	ABC Ltd	DPS	Draft
1000064	EREQ1000061	contract 3 - Lot 2	ABC Ltd	DPS	Draft
1000063	EREQ1000061	contract 3 - Lot 1	ABC Ltd	DPS	Draft
1000062	EREQ1000060	contract2 - Lot 4	ABC Ltd	DPS	Draft
1000061	EREQ1000060	contract2 - Lot 3	ABC Ltd	DPS	Draft
1000060	EREQ1000060	contract2 - Lot 2	ABC Ltd	DPS	Draft
1000059	EREQ1000060	contract2 - Lot 1	Multiple Suppliers	DPS	Approved
1000058	Contract created from R...	Contract created from Ref Test 1	-	Standard Contract	Draft
1000057	EREQ1000056	ext code 6 - no part no	ABC Ltd	Standard Contract	Approved

5.2 Searching for Contracts

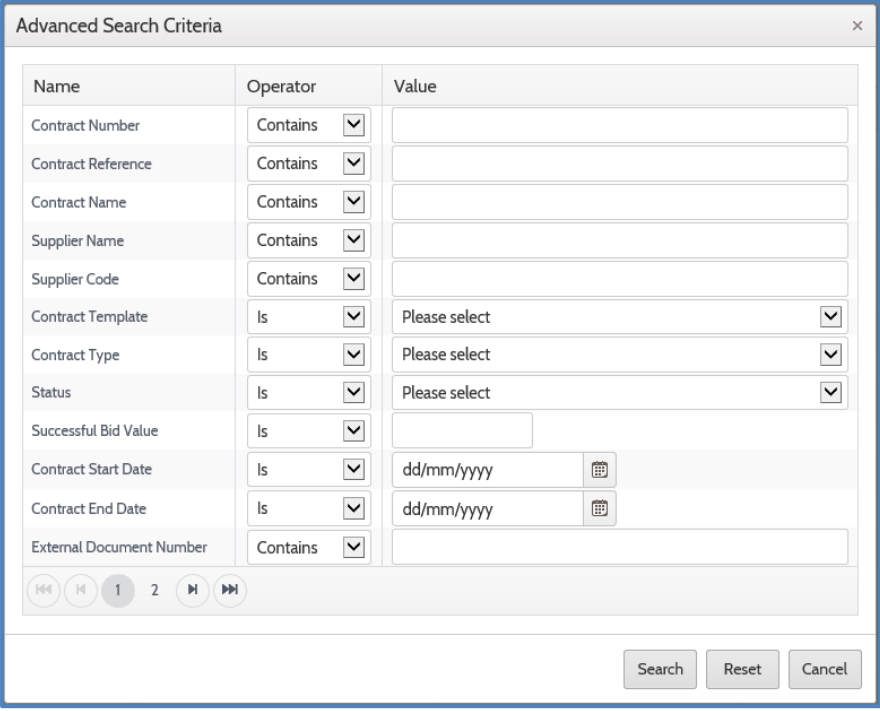
To search for a contract you can select the drop-down list under the “Search using: heading to reveal the following parameters:

- Contract Number – A free text search on the contract number

- Contract Reference – A free text search on the contract reference
- Contract Name – A free text search on the contract name
- Supplier Name – A free text search on the supplier name
- Contract Template – A drop down list of available templates is presented
- Contract Type – A drop down list of available types is presented
- Status – A drop down list of available statuses is presented
- Successful Bid Value – A free text search on the contract value
- Contract Start Date – A date picker for the contract start date
- Contract End Date – A date picker for the contract end date
- Geographical Region – An Ellipsis button provides the option to open a popup to select relevant Regions

Once the parameter has been selected, and a search value entered click on the  icon to commence the search. Note, that entering no values will effectively bring back the entire list of contracts that the user has access to.

To perform an advanced search click on the  icon. This will open up a pop-up dialog as follows:



The Advanced Search Criteria dialog box is a window with a title bar and a close button. It contains a table with three columns: Name, Operator, and Value. The table has 14 rows, each corresponding to a search criterion. The 'Name' column lists various contract-related fields. The 'Operator' column contains a dropdown menu with 'Contains' or 'Is' selected. The 'Value' column contains a text input field or a dropdown menu. At the bottom of the dialog, there are three buttons: Search, Reset, and Cancel. Below the table, there is a pagination bar with buttons for first, previous, next, and last, and a page number indicator showing '1' of '2' pages.


Name	Operator	Value
Contract Number	Contains	
Contract Reference	Contains	
Contract Name	Contains	
Supplier Name	Contains	
Supplier Code	Contains	
Contract Template	Is	Please select
Contract Type	Is	Please select
Status	Is	Please select
Successful Bid Value	Is	
Contract Start Date	Is	dd/mm/yyyy
Contract End Date	Is	dd/mm/yyyy
External Document Number	Contains	


The advanced search function allows the user to enter multiple search criteria and enter operators to filter the result set further.


NOTE: any Reference Fields that have been associated with “Contract” or “Contract Supplier” can also be used to search for contracts

The following operators can be applied:

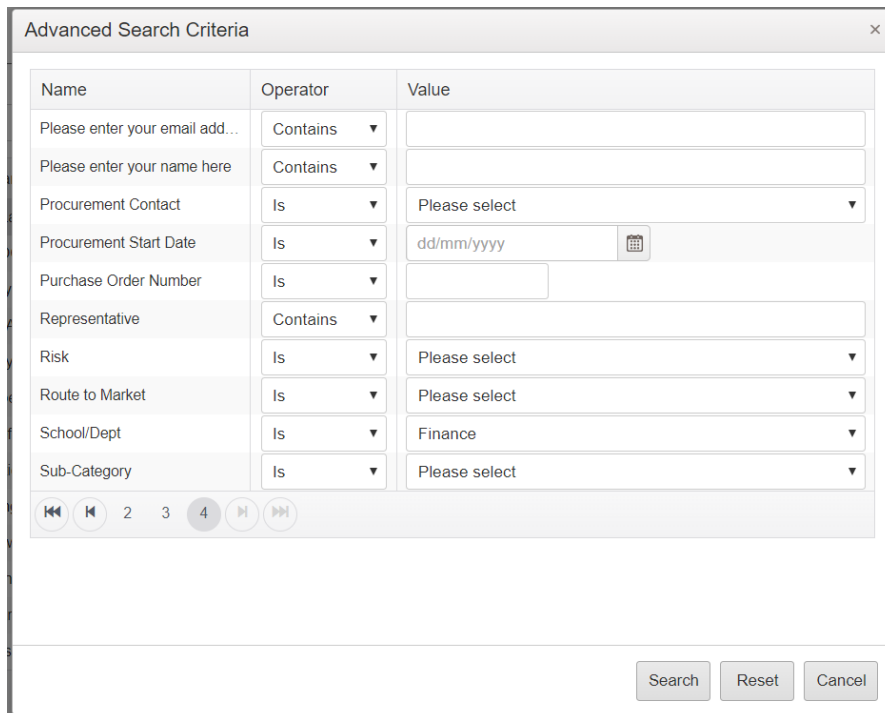
- Contains
- Does not Contain
- Begins With
- Equals
- Does not Equal

Once the search criterion has been entered, click  to commence the search using the parameters entered above.


Click  to reset the search parameters back to the default i.e. as per the screen shot above





Click  to exit the screen to reveal the list of contracts without any search parameters (effectively revealing the full list) as before.




In the below example, the user has moved into tab 4, and is searching on the 'School/Dept', to bring up all Contracts owned by Finance:



The image shows a screenshot of the 'Advanced Search Criteria' dialog box. It features a table with three columns: 'Name', 'Operator', and 'Value'. The table contains several rows for different search criteria. The 'School/Dept' row is selected, and its 'Value' is set to 'Finance'. Below the table is a tabbed interface with tabs labeled 2, 3, and 4. Tab 4 is currently active. At the bottom right of the dialog are three buttons: 'Search', 'Reset', and 'Cancel'.

Name	Operator	Value
Please enter your email add...	Contains ▼	
Please enter your name here	Contains ▼	
Procurement Contact	Is ▼	Please select ▼
Procurement Start Date	Is ▼	dd/mm/yyyy 
Purchase Order Number	Is ▼	
Representative	Contains ▼	
Risk	Is ▼	Please select ▼
Route to Market	Is ▼	Please select ▼
School/Dept	Is ▼	Finance ▼
Sub-Category	Is ▼	Please select ▼

Navigation:   2 3 **4**  

Buttons:   

5.3 Creating a New Contract

Contracts are visible from the “Contracts” Page in the Contracts Module, as noted.



To create a new contract, click on the **New** Toolbar button. This will open the New Draft Contract pop-up dialog:

New Draft Contract

Template:
Standard Template - no Output

Contract Number:
1000142 (Prospective)

Reference:

Contract Name:

Contract Description: (4000 characters remaining)

OK Cancel

Select the relevant **Template** from the drop-down. The Template will contain the name of your school/division. You must use the template of the school/division that owns the contract. If you cannot see the template, contact the Finance Service Desk.

Enter the Contract Reference, Contract Name and Contract Description. Then click **OK**.

Note: Clicking **Cancel** will exit the screen and discard any data entry.

The newly created contract will be displayed with the reference, name and description entered as per the entries made into the previous window. The tabs displayed are based upon the tab structure maintained earlier in this document against the Contract Template:

SRM
Sourcing
Contracts
Assessments
Transactions
Reports
More

Contract MD20170510 - Provision of IT Goods
Go To...
Save
Close
Submit
Delete
Pull
Export
History

General
Suppliers
Lots
Items
Classifications
Associated Contracts

Contract Number: 1000142
Reference: MD20170510
Contract Name: Provision of IT Goods
Contract Description: (3979 characters remaining) Provision of IT Goods
Contract Template: Standard Template - no Output
Contract Type: Standard Contract
Status: Draft
Created By/Date: Matt Davies, 10/05/2017

Default Finance Code:
Start Date: dd/mm/yyyy
End Date: dd/mm/yyyy
Termination Notice Period: - Working Day(s)
Extension End Date: dd/mm/yyyy
Currency: GBP
Estimated Value:
Total Successful Bid Value:
Projected Contract Value:
Order Total Value: 0.00
Invoice Total Value: 0.00
Outstanding Value: 0.00

IMPORTANT: Save the changes by clicking **Save** on the Toolbar. This will finalise the Contract Number and allow the Contract data to be populated. Clicking **Close** will lose the changes and not create the contract, therefore please remember this step.

5.4 Creating a Contract (via Sourcing)

If a Sourcing Project has been run in the The Contract Management System, the final stage is to Award the Contract. This is performed from the Evaluation Page for the RFX Request Document. As below...

SRM
Sourcing
Contracts
Assessments
Transactions
Reports
More

Evaluation: EREQ1000186 - Scoring Project
Back
Submit for Award
Award Contracts
Compare Prices

Lot: Lot 1 - IT Hardware
Response View: All Responses

		ABC Ltd	DMD Enterprises
Criteria	Weight	Weighted Score	Weighted Score
Quality	30.00%	23.10	6.00
Price	70.00%	70.00	65.63
Total Combined Score		93.10	71.63
Overall Ranking		1	2
Current Lot Status		Rejected	Rejected




As such in Sourcing the **Award Contracts** button will open the following Contract Award Wizard...

The dialog box is titled "Contract Award Wizard" and contains the sub-header "Contract Award Wizard - Creation Method". Below the sub-header is the instruction: "Please choose how you would like to group Lots and Suppliers on the new Draft Contracts." Under the heading "Contract Creation Method:", there are five radio button options: "Create a single Contract." (which is selected), "Create one Contract per Supplier.", "Create one Contract per Lot.", "Create one Contract per Supplier and Lot.", and "Don't create any Contracts." At the bottom right, there are two buttons: "Next >" and "Cancel".

Select the relevant Method and click **Next**.

The dialog box is titled "Contract Award Wizard" and contains the sub-header "Contract Award Wizard - Template Selection". Below the sub-header is the instruction: "Please select a Template and Manager for your new Contracts. You can change these in the next step if required." Under the heading "Contract Template:", there is a dropdown menu showing "Standard Template - no Output". Under the heading "Contract Manager(s):", there is a text input field and a button with three dots "...". Below these are three checked checkboxes: "Copy Product Classification Codes onto new Contract(s)?", "Copy associated Reference Fields onto new Contract(s)?", and "Copy (Buyer) Documents onto new Contract(s)?". Under the heading "Contract Status:", there are two radio button options: "Create all Contracts in Draft status." (which is selected) and "Automatically move status of each Contract as far forward as possible." At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

Select the relevant Contract Template and click on the  button to add Contract Managers to the Contract and determine if the Product Classifications set on the relevant RFX Request Document is copied over to the Contract. Further, Reference Fields on the RFX Request Document (Buyer Reference Fields) can be copied over and also any documents that have been held on the RFX Request Document from which the Contract(s) are being created.

The next option relates setting the Status of the contract being created. The Status can be set to the default of "Draft" or the option can be selected to "Automatically move status of each contract as far

forward as possible". Choosing the latter option will allow a contract to be progressed to a further status depending on the permissions the User has been given on the Contract Template being used to create the contract and the data that has been provided during the Sourcing Project. This option is useful as the Sourcing process itself may have included the approval of the contract and the award of the suppliers and as such the contract may be active at the time of creation and should NOT be set to the default of "Draft". Here is a summary of the necessary conditions for the status of a contract to be automatically advanced...

- 1) If the user has permission to submit for approval, the status is advanced to "Being Approved". Otherwise it remains as "Draft".
- 2) If the user has permission to approve, the status is advanced to "Approved". Otherwise it remains at "Being Approved".
- 3) If the user has permission to award suppliers, the status of each supplier is set to "Awarded". Either way, the contract status remains at "Approved".
- 4) If the contract contains any awarded suppliers, the user has permission to activate the contract, and the contract is in the correct state to be activated (contains suppliers, items etc. – see below section for more detail), the status is set to "Active". Otherwise it remains at "Approved".

The auto status advancement must adhere to the existing business rules and security. There is an individual role permission associated with every status change, and the user who is importing or awarding contracts must be a member of these roles in order for the contract to be automatically passed through each related status. In addition to security, there are one or two business rules surrounding activation. To recap, these are:

- 1) At least one supplier must be added to the contract. (When manually activating, the system requires there to be at least one supplier with a status of Awarded. However when advancing the status automatically, the system assumes that ALL suppliers on the contract are to be awarded, and sets each supplier status accordingly).
- 2) If the contract supports items (Allow Items = Yes), at least one "Supplier Item" must be added to the contract.
- 3) If the contract has a start date, this must not be in the future. (When manually activating, the system will change the start date to today after confirming this with the user, but this isn't practical when creating large volumes of contracts, therefore the assumption made is that the contract can't be activated).

Another subtlety is when a contract can be automatically set as Completed. When completing manually, there are no requirements over and above being a member of the required role permission. When advancing the status automatically however, we can't assume that we should complete the contract just because we can. Therefore, the contract will only be marked as complete if there is an end date which is in the past. If there's a future end date or no end date at all, it remains at the Active status.

In summary, it should not be possible to automatically put a contract into a status that would otherwise not be possible manually (for any reason).




Once all relevant options have been selected click **Next**






Contract Award Wizard

Contract Award Wizard - Proposed Contracts

Shown below are the Contracts that will be created. You can use the Edit icon to amend the details of each Contract if required.

☒ Complete the wizard (I've added all the Contracts I need).
 ☐ Add further Contract(s).


Contract Number	Suppliers	Lots	Value	Action
1000143 (Prospective)	1	1	GBP 450.00	
1000144 (Prospective)	1	1	GBP 250.00	
1000145 (Prospective)	1	1	GBP 280.00	

< Back

Finish

Cancel

Click on the  icon for the Contract to edit the Contract Details. Doing so will open the following pop-up dialog...

Edit Proposed Contract

Template:

Standard Template - no Output

Contract Manager(s):

Matt Davies, (ADMIN)

Contract Number:

1000143 (Prospective)

Status:

Draft

Reference:

EREQ1000186

Contract Name:

Scoring Project - ABC Ltd/Lot 1 - IT Hardware

Contract Description: (3985 characters remaining)

Scoring Project

OK

Cancel

5.5 Navigating the Contract Record

To add/amend or view information on the contract record, you can navigate the current tab group by clicking on the relevant tab.



To navigate to other Tab Groups, select the **Go To...** Toolbar button

This will display the tab groups relevant to the current contract. Tab Groups will contain either single or multiple tabs. It is a way to group like-information together and make it quicker and easier to view the relevant information. Here is an example screen shot from a Contract record to demonstrate the Tab Group...

The screenshot shows a web application interface for a contract record titled "Contract MD20170510 - Provision of IT Goods". The top navigation bar includes tabs for SRM, Sourcing, Contracts, Assessments, Transactions, Reports, and More. Below this, a toolbar contains icons for Go To..., Save, Close, Submit, Delete, Pull, Export, and History. The main content area has a tab group with "General", "Suppliers", "Lots", "Items", "Classifications", and "Associated Contracts". The "General" tab is active, displaying fields for Contract Number (1000142), Reference (MD20170510), Contract Name (Provision of IT Goods), Contract Description (Provision of IT Goods), Contract Template (Standard Template - no Output), Contract Type (Standard Contract), Status (Draft), and Created By/Date (Matt Davies, 10/05/2017). To the right, there are fields for Default Finance Code, Start Date, Termination Notice Period, Extension End Date, Currency (GBP), Estimated Value, Total Successful Bid Value, Projected Contract Value, Order Total Value, Invoice Total Value, and Outstanding Value. A "Go To..." dropdown menu is open, showing a list of tab groups: Overview, Administration, Configuration, Financial, Technical, Relations, Performance, and New for Config. Each group has a sub-menu of tabs: Suppliers, Lots, Items, Classifications, and Associated Contracts.

A specific Tab can be selected from the sub-menu. The Tab you click onto will display along with all other tabs in that Tab Group. If you Save or Close the Contract Record, the last Tab viewed will be recorded and the next time the Contract is opened it will default to that last Tab viewed by that User.

5.6 Amending an Existing Contract

From the "Contracts" Page a user can see all Contracts that they have access to.

Find the appropriate contract from the list (you may need to search for this, in which case see the section relating to searching for a contract).



Once the Contract record is highlighted, select the **Amend** Toolbar button to open the contract. Alternatively, double-click the Row. If you wish to amend a contract, remember to **Save** the changes, whilst to simply view the Contract when you are finished simply click **Close** to exist the Contract without committing any changes.

5.7 Contract Management – Saving Changes to Contracts

It is **IMPORTANT** to note that if anything is added/removed/amended in any area of the Contract Management Module the **SAVE** Toolbar button **MUST BE USED** to confirm the changes. Failure to do so will not have saved the changes for when the record is next accessed.

5.8 Contract Management – Contract Record Tabs


This section of the User Guide will provide details on how each tab can be used on a Contract. Some of the tabs will have been defined in previous section of this User Guide in which case a note will be made of the section to visit for more information.

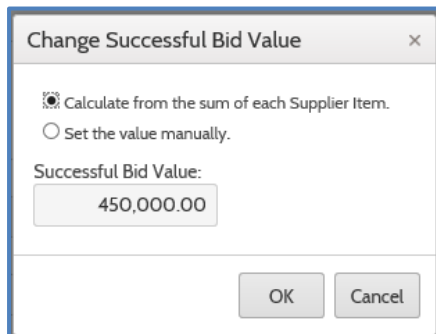
5.8.1 General Tab

The screenshot displays the 'General' tab of a contract record for 'MD201705101 - Provision of IT Related Goods and Services'. The interface includes a top navigation bar with various modules like SRM, Sourcing, Contracts, Assessments, Transactions, Reports, Catalogues, and Configuration. Below this is a toolbar with actions: Go To..., Save, Close, Submit, Delete, Pull, Export, and History. The form itself is divided into two main sections. The left section contains fields for Contract Number (1000146), Reference (MD201705101), Contract Name (Provision of IT Related Goods and Services), Contract Description (Provision of IT Related Goods and Services), Contract Template (Contract Template for User Guide), Contract Type (Standard Contract), Status (Draft), and Created By/Date (Matt Davies, 10/05/2017). The right section contains fields for Default Finance Code, Statutory Waiting Period (1 Working Day(s)), Start Date (05/05/2017), End Date (04/05/2021), Termination Notice Period (- Working Day(s)), Extension End Date (dd/mm/yyyy), Currency (GBP), Estimated Value (500,000.00), Total Successful Bid Value (450,000.00), Projected Contract Value (450,000.00), Order Total Value (0.00), Invoice Total Value (0.00), and Outstanding Value (0.00).

Note the 3 Value fields – Estimated Value / Total Successful Bid Value and Projected Contract Value

The Estimated Value can either be entered or will be taken from the Estimated Value of the Sourcing Project that created the Contract (taken from the e-sourcing module, if the contract was created via the tendering system).

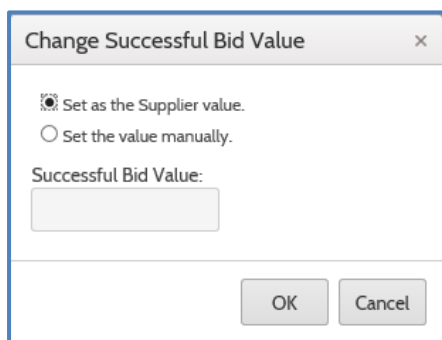
The Total Successful Bid Value can be calculated in 2 ways. Clicking on the  button will provide the following option...



A screenshot of a 'Change Successful Bid Value' dialog box. It has a title bar with a close button. Inside, there are two radio buttons: 'Calculate from the sum of each Supplier Item.' (which is selected) and 'Set the value manually.'. Below the radio buttons is a text field labeled 'Successful Bid Value:' containing the value '450,000.00'. At the bottom right are 'OK' and 'Cancel' buttons.

Select either option as required.

If the Contract Settings are configured to not allow for Contract Items then the Contract can be based on a Contract Value for each Supplier. In this instance, the pop-up dialog to change the Successful Bid Value will display as...




A screenshot of a 'Change Successful Bid Value' dialog box. It has a title bar with a close button. Inside, there are two radio buttons: 'Set as the Supplier value.' (which is selected) and 'Set the value manually.'. Below the radio buttons is an empty text field labeled 'Successful Bid Value:'. At the bottom right are 'OK' and 'Cancel' buttons.

NOTE: if the Successful Bid Value is being manually entered it cannot be updated after the contract has been activated. As such the use of Variations and the use of the Projected Contract Value functionality should be used to determine the final contract value. If the Contract's Successful Bid Value is being calculated from Supplier Values (where no Items are defined) or Supplier Items (where they are defined) then the Successful Bid Value can be adjusted even if the contract is "Active" by altering the Supplier's Successful Bid Value or the Value of the Supplier Item(s). It is important to note that if it is required to stop the value of items affecting the Successful Bid Value after the activation of a contract, there is a Contract Setting "Allow Item Amendments After Activation" that can be set to "No". In which case changes to a contract would work as per the manual setting of the value after activation by use of approved variations and the display of the Project Contract Value field in the Contract Settings.

The Projected Contract Value will be the sum of the "Total Successful Bid Value" and any Variations that have been approved (non-approved variations will NOT affect this figure).

The "Sourcing Project Number/Name:" field will display the Sourcing Project the Contract was

awarded from. The  button will take the user to the relevant Project so more details can be viewed, as long as the user has Sourcing Project Administrator or Sourcing Project Viewer access.

The Order Total Value, Invoice Total Value and Outstanding Value are read only fields populated by the transactions in PROACTIS P2P if the Contract is set to output.

5.8.2 Suppliers Tab

As noted above this will only display where multiple suppliers are allowed on a contract

The screenshot shows the 'Contract MD201705101 - Provision of IT Related Goods and Services' interface. The 'Suppliers' tab is selected. The table displays the following data:

#	Code	Name	Status	Projected Contract Value	Actions
1	ABC	ABC Ltd	New	GBP 450,000.00	

Below the table is a pagination bar with '1' selected. An 'Add' button is located at the bottom right.

The Action button will display the Suppliers Shop Window, the Action button will allow the details to be edited, the will remove the Supplier from the Contract (NOTE: this will only be possible prior to the Supplier being Approved), and the will take the user to the SRM Supplier Directory record of the supplier – as long as the user has SRM the Supplier Directory User Permission granted.

To add Suppliers, click on the **Add** button

The 'Select Suppliers' dialog box is shown. It has a search bar with 'Search where:' and 'Contains:' fields. The 'Search where:' dropdown is set to 'Supplier Name'. The 'Search Results' section is empty, displaying 'No Suppliers have been found.' The 'Selected Suppliers' section is also empty, displaying 'No Suppliers have been selected.' At the bottom, there are buttons: 'Select All', 'Remove All', 'Can't Find...', 'OK', and 'Cancel'.

The “Select Suppliers” pop-up dialog will appear allowing suppliers to be searched for. It is important to note that the default search will return suppliers available in the Buying Organisation’s Supplier Directory, the filter can be changed to “Search All Organisations” to search all Organisations in the System.

****IMPORTANT NOTE**:** All Deleted Suppliers and Suppliers Suspended in the Buying Organisation's Supplier Directory are EXCLUDED from the Search Results

Once a Search has been run the results will display as below...

Select Suppliers

Search where: Contains:

☒ Search Supplier Directory
☐ Search All Organisations

Search Results

Your Code	Name	Town/City	Actions
1000001	DMD Self Registered	Town	<input type="checkbox"/>
1000002	DMD - Self Registered Test	Town	<input type="checkbox"/>
1000006	New SP	Bridgend	<input type="checkbox"/>
1000008	Supplier 2	Bridgend	<input type="checkbox"/>
1000009	Supplier 4	Bridgend	<input type="checkbox"/>
1000010	Supplier 6	Bridgend	<input type="checkbox"/>
1000011	Supplier 8	Bridgend	<input type="checkbox"/>
1000012	Supplier 10	Bridgend	<input type="checkbox"/>

1 2 3

Selected Suppliers

Your Code	Name	Town/City	Actions
No Suppliers have been selected.			

1 2 3

Tick the supplier you wish to add the Supplier to the “Selected Suppliers” pane. Alternatively, the **Select All** button can be used to add all Suppliers on all Results Pages of the Search Results to the “Selected Suppliers” pane, “Remove All” can be used to clear the pane. Once Suppliers have been selected to be added click on the **OK** button that will be active (it only becomes active when one or more suppliers have been selected).

The Suppliers will then be added to the Suppliers Tab on the Contract, as shown above.

To Amend the Supplier's Status, click on the Action button for the relevant Supplier. The following pop-up dialog will be displayed...

Edit Supplier

General Finance Codes


Supplier Name:
Supplier 2

Status:
New

Currency:
GBP

OK Cancel

The additional Statuses to select from are “Approved” or “Rejected”. Suppliers should be marked as either of these as appropriate.

To remove a supplier from a Contract, click on the corresponding  button

NOTE: the “Projected Contract Value” that displays will be taken from the value of the line items associated with the supplier where Items are allowed (plus any Approved Variations). However, if this is not the case then a value should be set against each Supplier. The Edit Supplier pop-up dialog will display as...

Edit Supplier

General Finance Codes

Supplier Name:
ABC Ltd

Status:
New

Successful Bid Value:
 GBP

OK Cancel

The Process of Awarding a Supplier the Contract is explained later in this guide in the Process Section.

5.8.3 Lots Tab

Code	Name	No. of Items	Estimated Value	Actions
LOT1	Lot1	1	GBP 200.00	
LOT2	Lot2	0	-	

The existing/default Lot can be amended by clicking on the button.

Click **Add** to add a Lot to the Contract – when prompted insert a Code and Name for the Lot.

Lots can be removed by clicking on the button that will appear

Note: the expected value of the lot will be taken from the items associated with the lot (where an estimated value was provided for the Items on the originating Sourcing Project)

5.8.4 Items Tab

#	Lot	Part Number	Name	Estimated Value	Actual Value	Actions
1	Lot1		Contract Item	-	GBP 450,000.00	

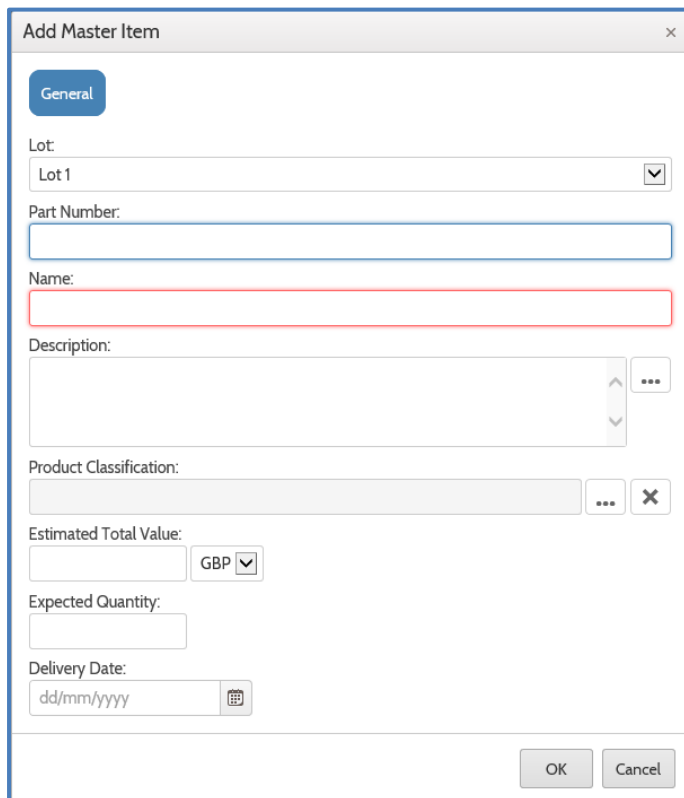
The Items Tab introduces the concept of Master Items and Supplier Items. Master items are those associated with the contract and in turn will link to a supplier associated to the contract. For example, if a Contract has 3 Master Items – A, B and C and 2 suppliers on the contract (Suppliers 1 and Supplier 2) it may be that the Supplier 1 is associated with Items A and B, and Supplier 2 is associated with item C (or variations of this).

Supplier Items are created from Master Items but also creating a supplier item will create a master item record. This helps with duplicating the same item across various suppliers (it may be different suppliers are providing different numbers of the same item)

NOTE: In the Contract Template and Contract Settings there is an option to “Hide Master Items” so only Supplier Items are viewed.

To filter between Master Items and Supplier Items (for specific suppliers) use the **VIEW** drop-down list as indicated above

To this extent, the functionality is specific to the filter in use. For example, if the Master Items are being viewed and the Add button is used to add a new item it will be a Master Item that is being created, as below...



Note: The Product Classification, Total Expected Value, Expected Quantity, Maximum Order Value and Delivery Date fields above are configurable Contract Settings and as such may not appear, may be optional or may be mandatory.

Notice that Master Items deal with Expected Quantity and Values whereas Supplier Items are actual quantity, values, prices etc.

Each Item must be associated with an appropriate Lot

If the **Add** button is used when the view filter has been set to **Supplier Items** (as in the example above displaying the Items Tab in the Contract record) the Add Supplier Item pop-up dialog appears. This is shown below. Notice there a Tabs holding different data elements.

5.8.5 Classifications Tab

Contract EREQ1000039 - Standard Tender Test - Lot 1

Go To... Save Close Complete Suspend Cancel Pull Export History

General Suppliers Lots Items **Classifications** Associated Contracts

Classification Code	Level	Description	Actions
No Classifications have been added.			

« « « » » » »

Add

To add a classification to the Contract – defining what the contract entails, e.g. the goods/services that will be provided – click on the **Add** button. The following pop-up dialog will appear...

Add Classification

Search Keywords:

Search Results

Code	Description	Action
03000000	Agricultural farming fishing forestry and related products.	+
03100000	Agricultural and horticultural products.	+
03110000	Crops products of market gardening and horticulture.	+
03111000	Seeds.	+
03111100	Soya beans.	+
03111200	Peanuts.	+

1
2
3

Selected

Code	Description	Action
No codes have been selected.		

OK
Cancel

Insert a keyword and click on the button to run a search. Click the **+** of the Classifications to add. These will be added to the “Selected” pane (bottom pane). Alternatively, by clicking on the Code the hierarchy will be opened for the relevant Classification as shown...

Add Classification

Search Keywords:

Hierarchical Results

> 03000000 : Agricultural farming fishing forestry and related products.

> 03100000 : Agricultural and horticultural products.

> 03110000 : Crops products of market gardening and horticulture.

> 03111000 : Seeds.

> 03111200 : Peanuts.

+

+

+



+

+

+

Selected

Code	Description	Action
No codes have been selected.		

Clicking  will add the relevant Classification and its Parent Codes in the hierarchy to the “Selected” pane. Clicking  will add the relevant Classification plus any Child Classifications to the “Selected” pane

Click on OK to add the Classifications. These will not always be exact, chose the nearest match.

Remember to click **Save** also on the Toolbar.



Once a Classification has been added the tab will display as follows....

SRM
Sourcing
Contracts
Assessments
Transactions
Reports
More

Contract MD201705101 - Provision of IT Related Goods and Servic...

Go To...
Save
Close
Submit
Delete
Pull
Export
History

General
Suppliers
Lots
Items
Classifications
Associated Contracts

Classification Code	Level	Description	Actions
30213200	Contract	Tablet computer.	
30237270	Items	Portable computer carrying cases.	

Add

In the example above a classification has been associated with the Contract, and an Item on the Contract has also been classified.

To remove a classification, click on the respective  icon in the Actions column. Click **Save** on the Toolbar.







5.8.6 Associated Contracts Tab





SRM Sourcing Contracts Assessments Transactions Reports More

Contract EREQ1000161 - test again - Lot 3

Go To... Save Close Complete Suspend Cancel Pull Export History

General Suppliers Classifications Associated Contracts

Contract No.	Reference	Name	Status	Actions
1000133	EREQ1000161	test again - Lot 4	Active	 
1000131	EREQ1000161	test again - Lot 2	Active	 
1000130	EREQ1000161	test again - Lot 1	Active	 

  1  

Add

This tab is used to link any other contract for any reason, for example, it may be the contracts that link to a specific internal project.

Contracts created from the same Sourcing Project are automatically associated with one another.

To add an Associated Contract, click on the **Add** button

Associate Contracts

Search where:
Contract Number

Contains:

Search Results

No.	Reference	Name	Template	Status	Actions
1000142	MD20170510	Provision of IT Goods	Contract Template for User Guide	Draft	<input type="checkbox"/>
1000143	EREQ1000186	Scoring Project - ABC Ltd/Lot 1 -...	Standard Template - no Output	Draft	<input type="checkbox"/>
1000144	EREQ1000186	Scoring Project - ABC Ltd/Lot 2 -...	Standard Template - no Output	Draft	<input type="checkbox"/>
1000145	EREQ1000186	Scoring Project - DMD Enterprise...	Standard Template - no Output	Draft	<input type="checkbox"/>
1000146	MD201705101	Provision of IT Related Goods an...	Contract Template for User Guide	Draft	<input type="checkbox"/>
1000001	MD101	Initial Test Contract for CIS Paym...	Standard Template - no Output	Active	<input type="checkbox"/>

1
2
3

Selected Contracts


No.	Reference	Name	Template	Status	Actions
No Contracts have been selected.					


OK
Cancel

Tick the box(s) of the contracts to be associated / linked. The Search and Advanced Search can be used to search for contracts based on

- Contract Number
- Contract Reference
- Contract Name
- Contract Template
- Contract Type
- Status
- Contract Value
- Contract Start Date
- Contract End Date
- External Document Number
- Supplier Name

Once the Contract is linked a corresponding link record will be created in the linked contract. Therefore if Contract A is associated with Contract B it follows that Contract B is associated with Contract A.

Click on the  icon to navigate to the associated contract (Access the Associated Contracts Tab for that Contract to return to the original contract).

Click on the  icon to remove the association

Remember to click on **Save** on the Toolbar

5.8.7 Divisions Tab

The screenshot shows the 'Divisions Tab' for a contract titled 'Contract EREQ1000161 - test again - Lot 3'. The interface includes a top navigation bar with tabs for SRM, Sourcing, Contracts, Assessments, Transactions, Reports, and More. Below this is a toolbar with icons for Go To..., Save, Close, Complete, Suspend, Cancel, Pull, Export, and History. The main area has a sub-tab bar with 'General', 'Divisions' (selected), 'Notes', 'Documents', 'Tasks', 'Geographical Scope', and 'Entities'. The 'Divisions' tab displays a table with columns 'Division Code', 'Division Name', and 'Actions'. The table is currently empty, with a message 'No Divisions have been added.' in the center. At the bottom right of the table area is an 'Add' button.

To associate Divisions with the Contract, click on **Add...**

The 'Select Division' dialog box is shown, featuring a list of divisions. The first two divisions are 'Organisation Admin' and 'Q&A', each with an unselected radio button. Below the list is a pagination control showing '1' of 1 items. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Click into the radio button for the relevant Division to add and repeat the process to add more divisions, if required.

Once all Divisions have been added click **Save** on the Toolbar.

5.8.8 Notes Tab

Contract EREQ1000161 - test again - Lot 3

Go To... Save Close Complete Suspend Cancel Pull Export History

General Divisions **Notes** Documents Tasks Geographical Scope Entities

View:
Contract

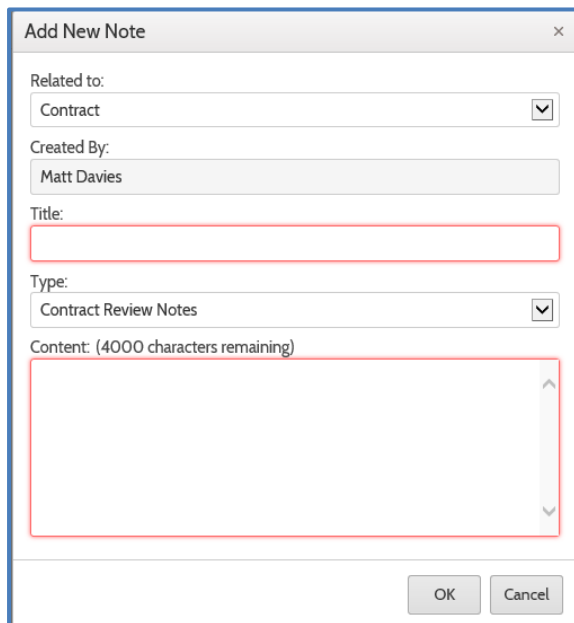
Date	Supplier	Title	Note Type	Author
No Notes have been added.				

Add

Notes can be created for the Contract itself, or individual suppliers on the contract. To this end ensure the relevant filter is applied to the View drop-down list to view relevant existing notes.

NOTE: relevant Note Types need to be defined in the System to add a note. See the Buying Organisation Configuration User Guide for more information on setting these up.

To add a note, click the **Add** button...



Add New Note

Related to:
Contract

Created By:
Matt Davies

Title:

Type:
Contract Review Notes

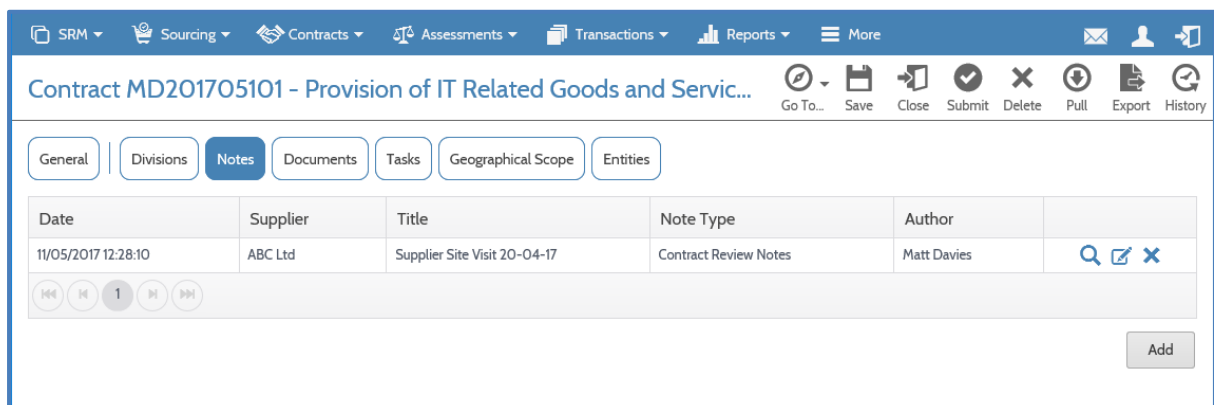
Content: (4000 characters remaining)

OK Cancel

Select either Contract or the name of the supplier the note relates to from the “Related to” drop-down list.

Insert a **Title** and select a relevant **Type** from the drop-down list and then insert the Note **Content**




Click **OK**



Contract MD201705101 - Provision of IT Related Goods and Servic...



Go To... Save Close Submit Delete Pull Export History

General Divisions **Notes** Documents Tasks Geographical Scope Entities

Date	Supplier	Title	Note Type	Author	
11/05/2017 12:28:10	ABC Ltd	Supplier Site Visit 20-04-17	Contract Review Notes	Matt Davies	  

1

Add

The Note and its content can be viewed in full , amended  or removed  respectively.

Remember to click **Save** on the Toolbar.

5.8.9 Documents Tab

The screenshot shows the 'Documents' tab for a contract titled 'Contract MD201705101 - Provision of IT Related Goods and Services'. The interface includes a top navigation bar with various modules like SRM, Sourcing, Contracts, Assessments, Transactions, Reports, Catalogues, and Configuration. Below the navigation bar, there are tabs for General, Divisions, Notes, Documents (selected), Tasks, Geographical Scope, and Entities. The main area displays a table of documents with columns: Document Name, Document Type, Owned By, Linkage, Visibility, Approved?, Expiry Date, and Action. The table contains three rows of data. At the bottom right, there is an 'Add' button.

Document Name	Document Type	Owned By	Linkage	Visibility	Approved?	Expiry Date	Action
PLI Document 2017	Public Liability Insurance Certificate	Buyer	Contract	Buyer Only	No	26/09/2017 23:59:59	
Corporate Standard Terms and Conditions	Terms and Conditions of Supply	Buyer	Template	Buyer/Supplier	No	-	
test	Public Liability Insurance Certificate	Buyer	Document Library	Buyer Only	No	26/09/2016 23:59:59	

Documents can be added from a pc/server and can be added on behalf of the buying organisation or a supplier.

To add any type of document, click **Add**

The screenshot shows a dialog box titled 'Add Document Wizard' with a close button (X) in the top right corner. The main heading is 'Add Document Wizard - Select Action'. Below the heading, it says 'Please select the type of Document addition you wish to perform.' There are three radio button options: 'Add a Document from the Library.' (which is selected), 'Upload a new Document.', and 'Upload a Document on behalf of Supplier(s)'. At the bottom right, there are two buttons: 'Next >' and 'Cancel'.

Select the relevant method and click **Next**

Note: if Upload a document on behalf of Supplier(s) is selected the next page will require the suppliers to be selected

The **Next** Page (for On Behalf of Supplier or adding a New Document options) is displayed...

Select the **Type** and insert a **Description** for the document.

Select whether the document should be Shared or Private. If a Document is uploaded by a Buyer User and is set to Shared, the document is Shared with all Suppliers on the Contract (if this setting is set to allow sharing in the template. Unless requested, this setting is not set to allow sharing). If the document is set to Private then only Buyer Users with appropriate permissions will see the Document on the Contract. **NOTE:** if a document is uploaded on behalf of a supplier it can only be set to Shared which means the document is visible to the supplier the document was uploaded for and the Buying Organisation. No other supplier will see this.

Browse for the file to add. Do not tick 'add to the Library'.

Either a **Next** or a **Finish** button will be displayed on completing the information. The reason being that the Document Type may have Expiry Dates and/or Reference Fields to be completed. If so the Page will display as follows...

Add Document Wizard

Reference Fields

Supply the reference information appropriate to the document type.

Expiry Date:

dd/mm/yyyy

ISO Certificate Reference:

< Back

Finish

Cancel

Where the Contract is a multiple Supplier Contract, the Documents Tab will display a View Filter to see documents uploaded as a “Contract” Document (that is, all documents uploaded for the Contract being viewed), “All Suppliers” (the documents that will be visible to all Suppliers on a Contract), Named Suppliers (this will display the documents uploaded on behalf of the specific Supplier). This displays as below...

SRM
Sourcing
Contracts
Assessments
Transactions
Reports
Catalogues
Configuration

Contract MD201705101 - Provision of IT Related Goods and Services
Go To...
Save
Close
Submit
Delete
Pull
Export
History


General
Divisions
Notes
Documents
Tasks
Geographical Scope
Entities

View:
Contract

Document Name	Document Type	Owned By	Linkage	Visibility	Approved?	Expiry Date	Action
ISO 2017 Certificate	ISO 9001 Certification	Supplier	Contract	Buyer/Supplier	No	26/05/2017 23:59:59	<div> <div></div> <div></div> <div></div> </div>
PLI Document 2017	Public Liability Insurance Certificate	Buyer	Contract	Buyer Only	No	26/09/2017 23:59:59	<div> <div></div> <div></div> <div></div> </div>
Corporate Standard Terms and Conditions	Terms and Conditions of Supply	Buyer	Template	Buyer/Supplier	No	-	<div> <div></div> <div></div> </div>
test	Public Liability Insurance Certificate	Buyer	Document Library	Buyer Only	No	26/09/2016 23:59:59	<div> <div></div> <div></div> </div>

1

Add

To open a document, click on the  Action button for the relevant document. The following pop-up dialog will appear...

View Document

General Reference Fields

Document Name:
ISO 2017 Certificate

Type:
ISO 9001 Certification

File Name:
Contract Upload Template.xlsx

File Size:
45.05 KB

Download Close

Note that if the Document has any Expiry Dates or Reference Fields associated with it there will be a Tab to view this, as shown...

View Document

General Reference Fields


Expiry Date:
26/05/2017

ISO Certificate Reference:
ISO123

Download Close

Click **Download**

Documents added either on behalf of a supplier or as a new document on the Contract can be edited

To edit the details about a document, click on the  icon for the relevant document.

- The Document Name can be changed and the visibility on the **General Tab**.
- Click on the **Browse** button and select the file to replace the existing one
- The **Reference Fields** Tab will display where the Document Type has Expiry Enabled and/or Reference Fields defined...

Once all changes have been made, click **OK**

If a document is required to be deleted, click on the corresponding  icon.

Remember to click **Save** on the Toolbar after any/all documents have been added/removed/edited.

5.8.10 Tasks Tab

Title	Assigned To	Scheduled Date	Status	Actions
Attend Site Visit for Supplier ABC Ltd for H&S Checks	Matt Davies	30/05/2017	Active	

Contracts themselves provide 2 further “Event Types” – “Now” and “Date Reference Field”. The former option will be triggered immediately whilst the latter provides the ability to select a Reference Field that has been configured as a “Date” Field that will then be used to trigger the Task. Whatever Date is populated at the time the Task is created will be utilised in the Rule created.

Tasks as noted can have notifications defined. These notifications are sent to the assigned user(s) an email and a System Message. The System Message for a Task that Requires an Action will open the Task dialog. All Users can access any Tasks they have been defined as an assignee of a manual action for by accessing the Tasks Page. This is accessed from the Users Settings on the Menu Bar, as shown below...

Area	Summary	Detail	Created	Actions
General Utilities	Task Notification	Matt...This is notification of a Task now due to be completed...	15/05/2017 09:55	
General Utilities	Task Notification	Matt...This is notification of a Task now due to be completed...	15/05/2017 09:55	
General Utilities	Task Notification	Matt...This is notification of a Task now due to be completed...	15/05/2017 09:55	
General Utilities	Task Notification	Matt...This is notification of a Task now due to be completed...	15/05/2017 09:55	
General Utilities	Task Notification	Matt...This is notification of a Task now due to be completed...	15/05/2017 09:55	

The Tasks Page displays as...

[illegible]

Selecting the appropriate Action button will display the Task dialog as below...

Manual Action

Action For:

Contract | Standard Tender Test - Lot 1

Title:

Test Task for Template

Description:

Test Task for Template

Assigned To:

Matt Davies

Issued Date:

15/05/2017

Action Required:

Please check the status of the contract

Comments:

Go To Contract

In Progress

Complete

Not Required

Reassign

Cancel

Here the User assigned the Task can then update the Task (In Progress or Complete/Not Required, or reassign the Task to another Buyer User) and provide Comments, or can be taken to the Contract record the Task relates to.

5.8.11 Variations Tab

SRM

Sourcing

Contracts

Assessments

Transactions

Reports

Catalogues

Configuration

Contract EREQ1000186 - Scoring Project - ABC Ltd/Lot 2 - IT Soft...

Go To...
Save
Close
Complete
Suspend
Cancel
Pull
Export
History

General

Payments

Variations

Transactions

Orders

Invoices

View:

All Variations

Number	Date	Supplier	Name	Status	Value Change	Actions
CV1000012	18/05/2017	ABC Ltd	Additional Licence Required	Posted	GBP +250.00	
CV1000010	18/05/2017	-	Extend Contract by 3 months	Approved	-	

1

Add

Contract Variations can be recorded against Contracts in the Contract Management Module. Variations can be just an extension of a contract, or may have a financial impact on the contract. In

the illustration above it can be seen that the Variations added can be viewed for “All Variations” or the view filter can be used to view variations linked to specific suppliers.

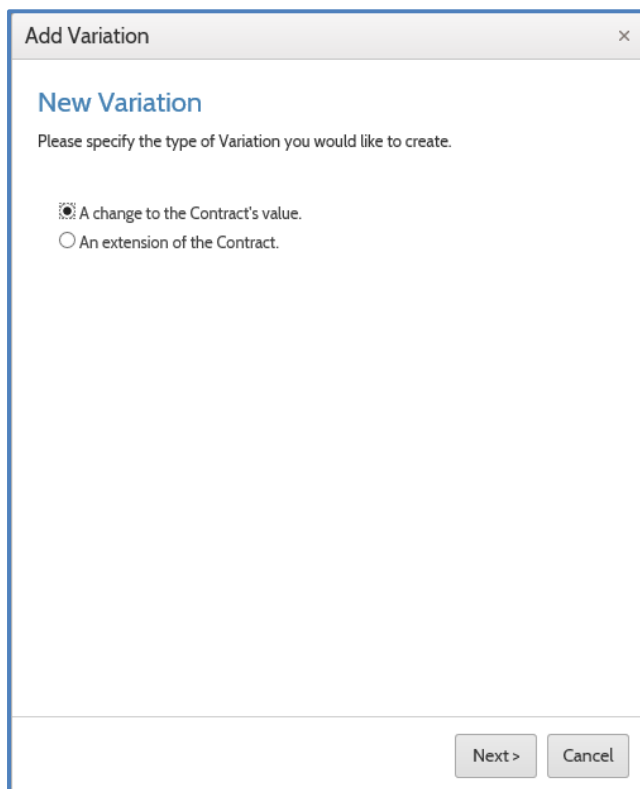
IMPORTANT: The Contract Settings must be set to “Allow Variations” to use any functionality on this Tab. Further, the User must have the appropriate permission(s) in their Contract Role on the Contract being administered.

NOTE: In order to generate Variations relating to an extension of the contract, the Contract Setting for “Option to Extend End Date” must be set to YES. Further, if the Contract Setting “Allow Extension End Date Amendments After Activation” is set to NO, then the only way in which the Extension End Date Field can be altered is by having a relevant Variation being approved.

In addition, for Variations to be used for Contract Extensions the Contract must have a Contract Start and End Date.

The images below illustrate the scenario whereby the Option to Extend is set to YES.

To Add a Contract Variation, click **Add**. The following pop-up dialog will be displayed...



Add Variation [Close]

New Variation

Please specify the type of Variation you would like to create.

☒ A change to the Contract's value.

☐ An extension of the Contract.

[Next >] [Cancel]

If the option “An extension of the Contract” is selected, and NEXT is clicked the following will be displayed...

Add Variation

New Variation

Please complete the following fields.

Variation Name:

Description: (1000 characters remaining)

☒ Extend by:

1 Calendar Month(s)

☐ Extend until:

30/06/2017

< Back Finish Cancel

Complete the Variation Name and Description, then determine either to “Extend By” a number and interval (the number drop-down list displays from 1 to 99, and the Interval can be set to Working Days / Calendar Months / Years), OR “Extend Until” where the Date Picker can be used to determine the actual End Date

Clicking on “**Finish**” the Variation will display as follows...

Add Variation

Variation - Extend Contract by 3 months

Save Close History

General

Variation Number:

Variation Status: New

Name: Extend Contract by 3 months

Description: (932 characters remaining)
Due to planning consent delays the Project will over run by 3 months

Internal Comments: (1000 characters remaining)

Start Date: 02/05/2017

End Date: 31/05/2017

Extension End Date: 31/08/2017

The Variation should be saved and at this point further options are made available on the Toolbar to “Submit” the Variation for Approval, or the Variation can be deleted.

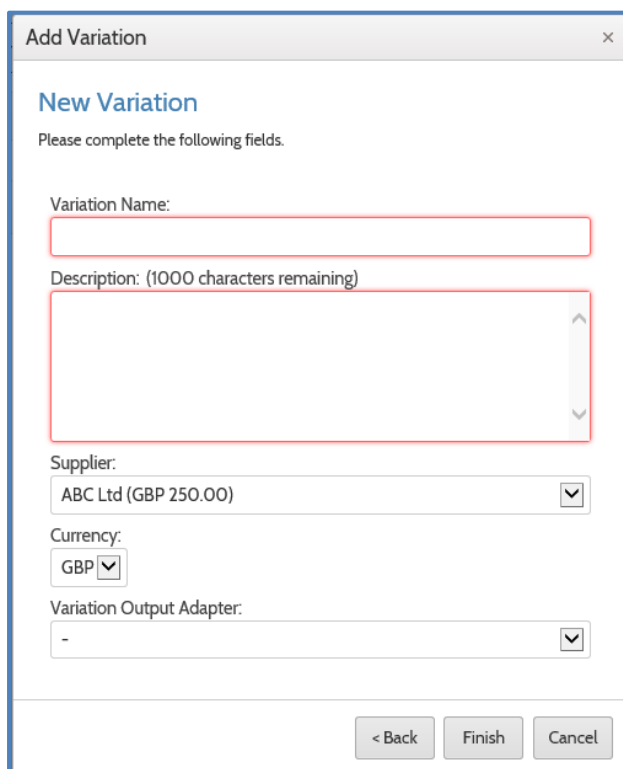
Once the Variation has been sent for approval Users on the Contract that have the permission to Approve Variations will be sent an email and System Message that will ask them to approve the Variation. The Approver will be able to open the Variation as a read-only record and Approve or Reject it. If it requires a change the record would need to be Rejected so that the Variation can be amended, and re-submitted for approval with the correct data.

Once approved the Extension End Date on the General Tab of the Contract record will be updated.

NOTE: if several Variations exist only the last approved Variation will set the Extension End Date so there will never be a conflict. Also, the Extension End Date **MUST** be later than the Contract End Date.

If your The Contract Management System Contract Management Module has been integrated with PROACTIS P2P and Variations are being output then the Extension End Date will be utilised when the Variation is posted after being Approved.

If the Variation is financial not date related, then the “A change to the Contract’s value” option should be selected on the first page of the Variation Wizard. When selected the next page will look like...



The screenshot shows a software dialog box titled "Add Variation" with a close button (X) in the top right corner. Below the title bar, the text "New Variation" is displayed in blue. Underneath, it says "Please complete the following fields." The form contains several input fields: a text box for "Variation Name:", a larger text area for "Description: (1000 characters remaining)", a dropdown menu for "Supplier:" showing "ABC Ltd (GBP 250.00)", a dropdown menu for "Currency:" showing "GBP", and another dropdown menu for "Variation Output Adapter:" showing "-". At the bottom of the dialog, there are three buttons: "< Back", "Finish", and "Cancel".

Insert a **Name** and **Description** for the Variation and determine which supplier the variation links to, the currency of the financial change to the contract and the Adapter to use to output the variation to PROACTIS P2P (this will only display if the “Output Variations” Contract Setting has been set to Yes)

Click **Finish**. The following Add Variation pop-up dialog will be displayed...

Add Variation

Variation - Additional Licence Required

Save Close History

General Items Interfaces

Variation Number:

Variation Status:

New

Name:

Additional Licence Required

Description: (951 characters remaining)

One more licence required for new Project Manager

Supplier Name:

ABC Ltd

Internal Comments: (1000 characters remaining)

Variation Value:

0.00 GBP

Variation Output Adapter:

ContractP2PostBoxOutput

Additional Internal Comments can be added to the Variation. It is advisable to click **Save** at this point so that the Variation Number is generated and the basic elements of the Variation are recorded.
NOTE: The Variation Value is a calculated field. This is calculated from the Items associated with the Variation.

To define the Items, access the **Items Tab**...

Add Variation

Variation CV1000012 - Additional Licence Required

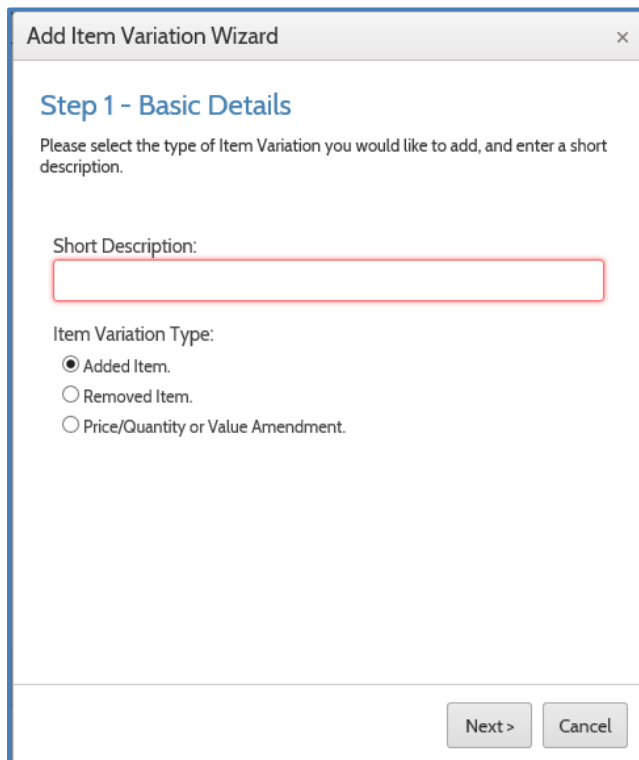
Save Close Submit Delete History

General Items Interfaces

#	Short Description	Type	Value Change	Actions
No Item Variations have been added.				

Add

To Add a Variation Item click **Add**...



Add Item Variation Wizard [Close]

Step 1 - Basic Details

Please select the type of Item Variation you would like to add, and enter a short description.

Short Description:

Item Variation Type:

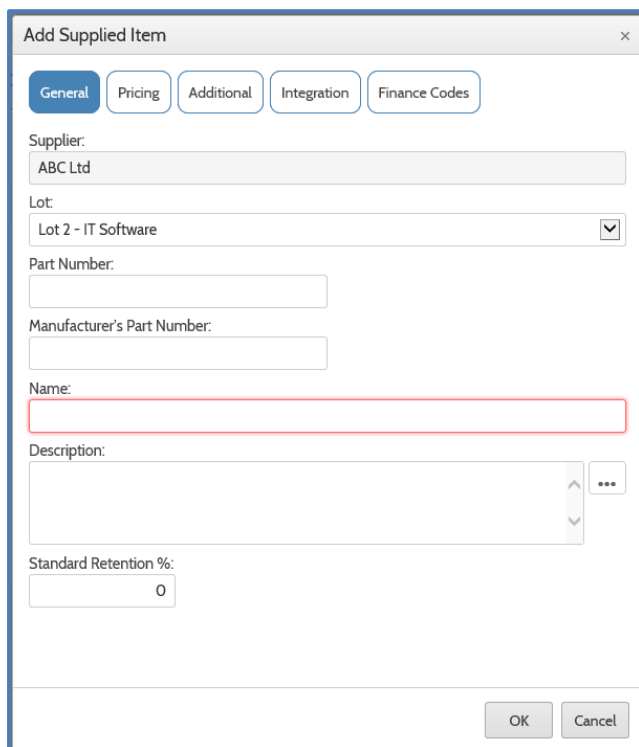
- ☒ Added Item.
- ☐ Removed Item.
- ☐ Price/Quantity or Value Amendment.

Next > Cancel

Insert a **Short Description** for the Contract Variation Item and determine whether an Item needs to be added to the contract, or an item removed, or if there is an amendment to the value or quantity of an existing contract item

Click **Next** to open the next page of the Item Variation. The next section covers each option above as the pages will differ...

Added Item



Add Supplied Item [Close]

General Pricing Additional Integration Finance Codes

Supplier:

Lot:
 [Dropdown Arrow]

Part Number:

Manufacturer's Part Number:

Name:

Description:

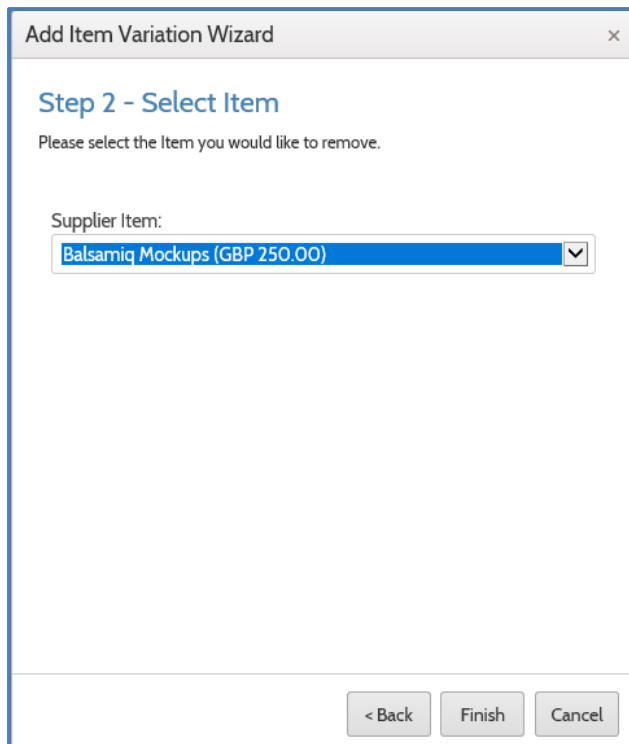
 [Expand Arrow] [More]

Standard Retention %:

OK Cancel

For more information on Items see the relevant section in this User Guide.

Removed Item



Add Item Variation Wizard

Step 2 - Select Item

Please select the Item you would like to remove.

Supplier Item:

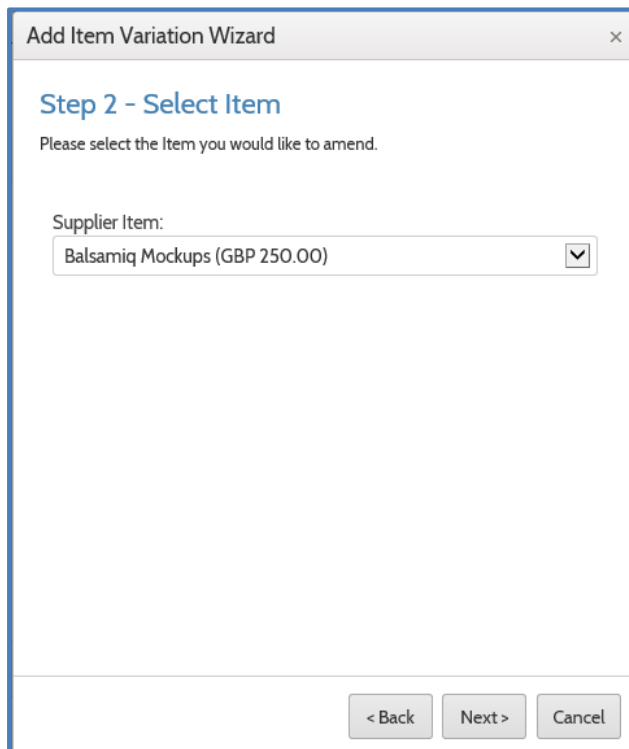
Balsamiq Mockups (GBP 250.00)

< Back Finish Cancel

Select the item to be removed and click **Finish**

Value/Quantity Amended

If the Contract Settings have been configured so that Advanced Item Pricing is NOT being used then the Next Page displays as...



Add Item Variation Wizard

Step 2 - Select Item

Please select the Item you would like to amend.

Supplier Item:

Balsamiq Mockups (GBP 250.00)

< Back Next > Cancel

Select the relevant Item and click Next...

Add Item Variation Wizard

Step 3 - Amend Value/Quantity

Please amend the Value/Quantity as required, then click the Finish button.

New Currency:
GBP

Pricing Type:
☒ Price and Quantity.
☐ Fixed Value.

New Unit Price:
250.00

Unit of Measurement:
Each

New Quantity:
1

New Calculated Value:
250.00

< Back Finish Cancel

Here the Pricing Type can be changed from Price/Quantity to Fixed Value. For each the relevant data can be amended, for example for Price/Quantity the Unit Price, Unit of Measure, and Quantity can be changed.

If the Contract Settings allow for “Advanced Item Pricing” then the following pages are displayed when amending Value/Quantity...

Add Item Variation Wizard

Step 2 - Select Item

Please select the Item you would like to amend.

Supplier Item:
Balsamiq Mockups (GBP 250.00)

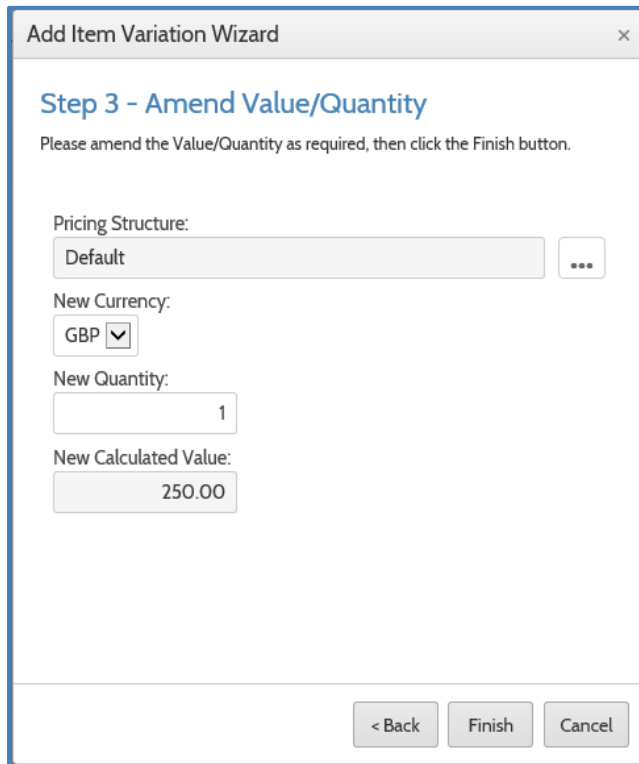
☒ Stick with the current Pricing Structure.
☐ Create a new Pricing Structure.

< Back Next > Cancel


Select the relevant existing item and determine whether it is applicable to “Stick with the current Pricing Structure” or “Create a new pricing Structure” – for example, if the Pricing Structure is set as

Price and Quantity but need to be changed to a Fixed Value then choose the latter option, or if it's just the price or quantity that need to be changed in an existing Price and Quantity Pricing Structure use the former option. Each option is explored below...

If the "Stick with current pricing Structure" is used the following will display...



The screenshot shows a dialog box titled "Add Item Variation Wizard" with a close button (X) in the top right corner. The main heading is "Step 3 - Amend Value/Quantity" in blue. Below the heading is a instruction: "Please amend the Value/Quantity as required, then click the Finish button." The form contains four sections: "Pricing Structure:" with a dropdown menu showing "Default" and a three-dot menu button; "New Currency:" with a dropdown menu showing "GBP" and a downward arrow; "New Quantity:" with a text input field containing the number "1"; and "New Calculated Value:" with a text input field containing "250.00". At the bottom of the dialog are three buttons: "< Back", "Finish", and "Cancel".

Click on the  button to view the relevant Pricing Structure etc.

View Pricing Structure

General

Prices/Rates

Name:

Default

Price(s) Type:

Price and Quantity

Price Adjustment(s) Type:

None

Rebate(s) Type:

None

Currency:

GBP

Valid From:

02/05/2017

☐ Special Offer?

Valid To:

dd/mm/yyyy

☐ Prices are Indicative?

☒ Enabled?

Close

Click Close to Return to the Previous Page, here the Quantity can be amended.

Once complete click on **Finish**.

If the “Create a new Pricing Structure” is selected then the following will be displayed...

The screenshot shows a dialog box titled "Add Pricing Structure" with a close button (X) in the top right corner. It has two tabs: "General" (selected) and "Prices/Rates". The "General" tab contains the following fields and controls:

- Name:** A text input field with a red border.
- Price(s) Type:** A dropdown menu with "Price and Quantity" selected.
- Price Adjustment(s) Type:** A dropdown menu with "None" selected.
- Rebate(s) Type:** A dropdown menu with "None" selected.
- Currency:** A dropdown menu with "GBP" selected.
- Valid From:** A date input field showing "18/05/2017" with a calendar icon.
- ☐ **Special Offer?**
- Valid To:** A date input field showing "dd/mm/yyyy" with a calendar icon.
- ☐ **Prices are Indicative?**
- ☒ **Enabled?**

At the bottom right of the dialog are "OK" and "Cancel" buttons.

For more information on Items see the appropriate section in this User Guide. Once the **Pricing Type** has been set the **Price/Rates** Tab should be accessed to define the Pricing Structure. Once complete, click on the **OK** button.

In this example, the new Pricing Structure is set to Price and Quantity as such the Quantity needs to be defined...

Add Item Variation Wizard

Step 3 - Amend Value/Quantity

Please amend the Value/Quantity as required, then click the Finish button.

Pricing Structure:
Additional Software

New Currency:
GBP

New Quantity:
1

New Calculated Value:
500.00

< Back Finish Cancel

Insert the Quantity and click **Finish**.

Once an Item Variation has been added it will appear as follows...

Contract EREQ1000186 - Scoring Project - ABC Ltd/Lot 2 - IT Software

Go To... Save Close Complete Suspend Cancel Pull Export History

General Payments **Variations** Transactions Orders Invoices

Number	Date	Supplier	Name	Status	Value Change	Actions
CV1000012	18/05/2017	ABC Ltd	Additional Licence Required	New	GBP +250.00	
CV1000010	18/05/2017	-	Extend Contract by 3 months	Approved	-	

1

Add

Repeat this process as appropriate for other items affected by this Contract Variation

Remember to click **Save** on the Toolbar

****IMPORTANT NOTE:**** ONLY APPROVED VARIATIONS WILL AFFECT A CHANGE ON THE CONTRACT ITEMS TAB. AS SUCH ONLY THEN IS THE PROJECTED CONTRACT VALUE UPDATED ON THE CONTRACT GENERAL TAB (if it is based on the Items in a Contract).

To Amend an existing Variation click

To Delete an existing Variation click

Contract Variations can also be approved. To do so access the variation created as if you were to

amend it and select the **Submit** Toolbar button as shown below...

Edit Variation

Variation CV1000012 - Additional Licence Required

Save Close Submit Delete History

General Items Interfaces

Variation Number:
CV1000012

Name:
Additional Licence Required

Description: (951 characters remaining)
One more licence required for new Project Manager

Supplier Name:
ABC Ltd


Internal Comments: (1000 characters remaining)

Variation Status:
New

Variation Value:
250.00 GBP

Variation Output Adapter:
ContractP2PostBoxOutput

The following will then be displayed...



Confirmation

Are you sure you want to submit this Variation for approval?

OK
Cancel

Click **OK** if appropriate

Users with permission to be able to Approve Variations will then be notified that the Variation requires approval and will be able to access the Variation and the screen will be displayed as follows...

Edit Variation

Variation CV1000012 - Additional Licence Required

Close
Approve
Reject
Delete
History

General
Items
Interfaces

Variation Number:
CV1000012

Name:
Additional Licence Required

Description:
One more licence required for new Project Manager

Supplier Name:
ABC Ltd

Internal Comments:

Variation Status:
Being Approved

Variation Value:
250.00

Variation Output Adapter:
ContractP2PPostBoxOutput

Click on **Approve** or **Reject** as required. In which case the following will be displayed for comments to be added...

Approve Variation

Optional Comment: (500 characters remaining)

OK
Cancel

Click **OK**



NOTE: If the Contract Setting for “Output Variations” is set to Yes, a **Post** Toolbar button will be displayed on the Variation record which will send the Variation to PROACTIS P2P. Further an “Interface” Tab will be displayed which will show the history of the transaction of the Variation.

View Variation

Variation CV1000012 - Additional Licence Required

Close
Processed
History

General
Items
Interfaces

Output Processes

Process	Status	Actions
Output of Variation CV1000012	Started	<div> <div> <div> <div> </div> </div> <div> <div>1</div> </div> <div> <div> </div> </div> </div> </div>

Restart

Process

Events

	Date/Time	Message
1	18/05/2017 13:31:01	Successfully generated O document(s). Awaiting collection by external application.
1	18/05/2017 13:31:01	Variation output using Adapter 'ContractP2PostBoxOutput'.

NOTE: if there has been a failure the transaction can be Restarted. The “Processed” button will mark the Variation as Processed. If selected, will display the following warning...

!

Confirmation

WARNING:

Variations are normally marked as Processed automatically. If there's been an integration problem, please ensure that this problem has been rectified in the external system before continuing.

Note that manually marking this Variation as Processed will not output any data, or affect any data which has already been output; it will only change the Variation's Status.

Are you sure you want to continue?

OK

Cancel

Click **OK** or **Cancel** as appropriate

5.8.12 Correspondence Tab

The screenshot shows the 'Correspondence' tab for a contract titled 'Contract MD201705101 - Provision of IT Related Goods and Services'. The interface includes a top navigation bar with various modules like SRM, Sourcing, Contracts, Assessments, Transactions, Reports, Catalogues, and Configuration. Below the navigation bar, there are tabs for 'General', 'Correspondence' (which is active), 'Dialogues', and 'Document Export Templates'. A 'View:' dropdown menu is set to 'Contract'. A table with columns 'Recipient', 'Organisation Name', 'Batch Name', 'Date Sent', 'Correspondence Type', and 'Actions' is displayed, but it is empty. A message in the center of the table states 'No Correspondences have been found.' At the bottom right of the table area, there is an 'Add' button.

Correspondences (emails) can be generated from a Contract. These may be emails that relate to the Contract as a whole, or to individual suppliers.

To create a new Correspondence Batch, click **Add**

The 'New Correspondence Batch Wizard' dialog box is shown. It has a title bar with a close button. The main heading is 'New Correspondence Batch'. Below the heading, a message says: 'Please select a Correspondence Type and choose a source whose details will be used for sending correspondences.' There are two main sections: 'Correspondence Type:' with a dropdown menu showing 'Contract Management', and 'Correspondence Batch Sources' which is a table. The table has a header row 'Batch Source' and one data row 'Provision of IT Related Goods and Services'. Below the table is a progress bar with five steps, the first of which is highlighted with the number '1'. At the bottom right, there are 'Next >' and 'Cancel' buttons.

Select the Correspondence Type - Contract Management for the contract (select the relevant contract displayed), or select Contract Supplier... This determines what the correspondence relates to – the Contract itself (Contract Management) or is about a particular Supplier (Contract Supplier)

New Correspondence Batch Wizard

New Correspondence Batch

Please select a Correspondence Type and choose a source whose details will be used for sending correspondences.

Correspondence Type:
Contract Supplier

Correspondence Batch Sources

Batch Source
<input type="radio"/> ABC Ltd
<input type="radio"/> DMD Enterprises

Navigation: 1

Next > Cancel

Select one of the Suppliers listed

Click **Next**

New Correspondence Batch Wizard

New Correspondence Batch

Please enter a name for the Correspondence Batch and provide output details for sending correspondences.

Batch Template: [Dropdown] [Close]

Batch Name: [Red Border]

Output Method: Email

Copy To: [Text Field]

Subject: [Text Field]

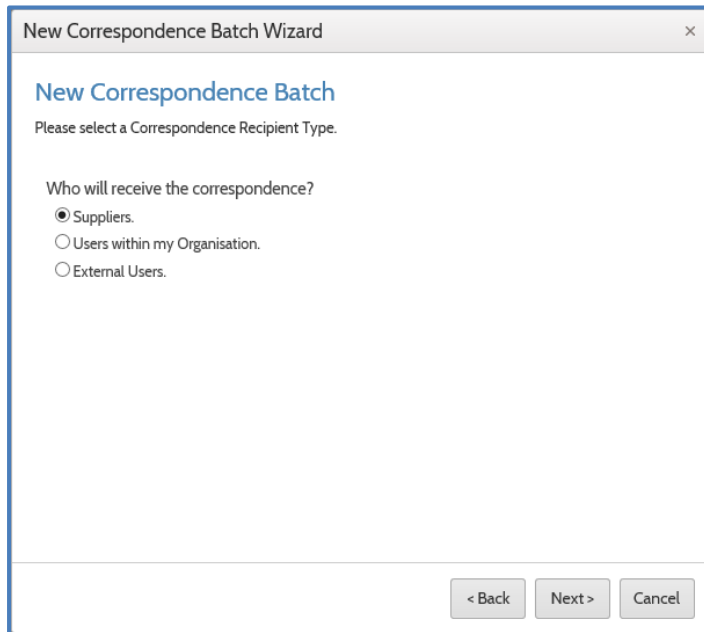
< Back Next > Cancel

Select a Batch Template, if appropriate (see the Buying Organisation Configuration User Guide for more details on Correspondence Templates) – this is optional

Insert a Batch Name

Insert (if required) the email address of anyone who should be copied into the email

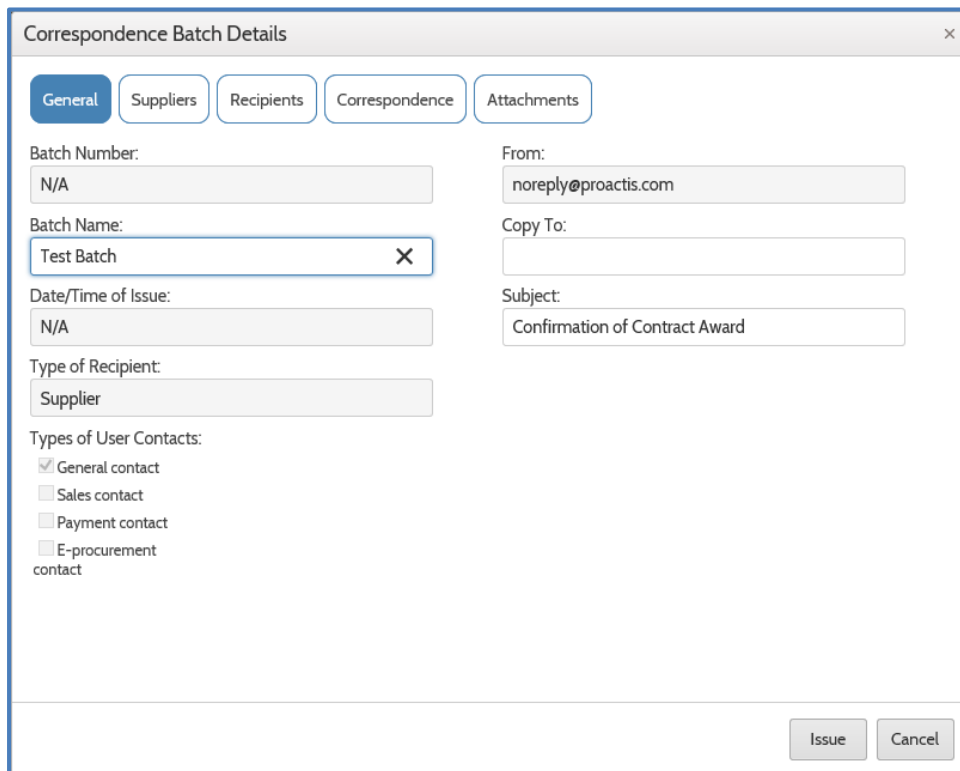
Insert a Subject and Click **Next**

A screenshot of a software dialog box titled "New Correspondence Batch Wizard". The dialog has a title bar with a close button (X). Below the title bar, the text "New Correspondence Batch" is displayed in a blue font. Underneath, it says "Please select a Correspondence Recipient Type." followed by the question "Who will receive the correspondence?". There are three radio button options: "Suppliers." (which is selected), "Users within my Organisation.", and "External Users.". At the bottom right of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

If Suppliers is selected and the Correspondence Type was set to Contract Management all suppliers from the Contract will be added, however if the Correspondence Type was set to Contract Supplier, it will be the Supplier selected on the first page of the Correspondence Wizard that will be added. There will be an additional page to the Correspondence Wizard where the Supplier Contact needs to be selected (General, Sales, Payment, E-Procurement) – this will determine the recipients of the email

If “Users within my Organisation” or “External Users” is selected then the recipients will be added at the next stage of the creation of the correspondence. In which case, for the “User in my Organisation” option the search will be for The Contract Management System Buyer Users to be added. If “External Users” is selected the recipients will need to be added manually inserting the person’s name and email address.

On completion of the initial Wizard the following will be displayed...



Correspondence Batch Details

General Suppliers Recipients Correspondence Attachments

Batch Number: N/A

Batch Name: Test Batch X

Date/Time of Issue: N/A

Type of Recipient: Supplier

Types of User Contacts:

- ☒ General contact
- ☐ Sales contact
- ☐ Payment contact
- ☐ E-procurement contact

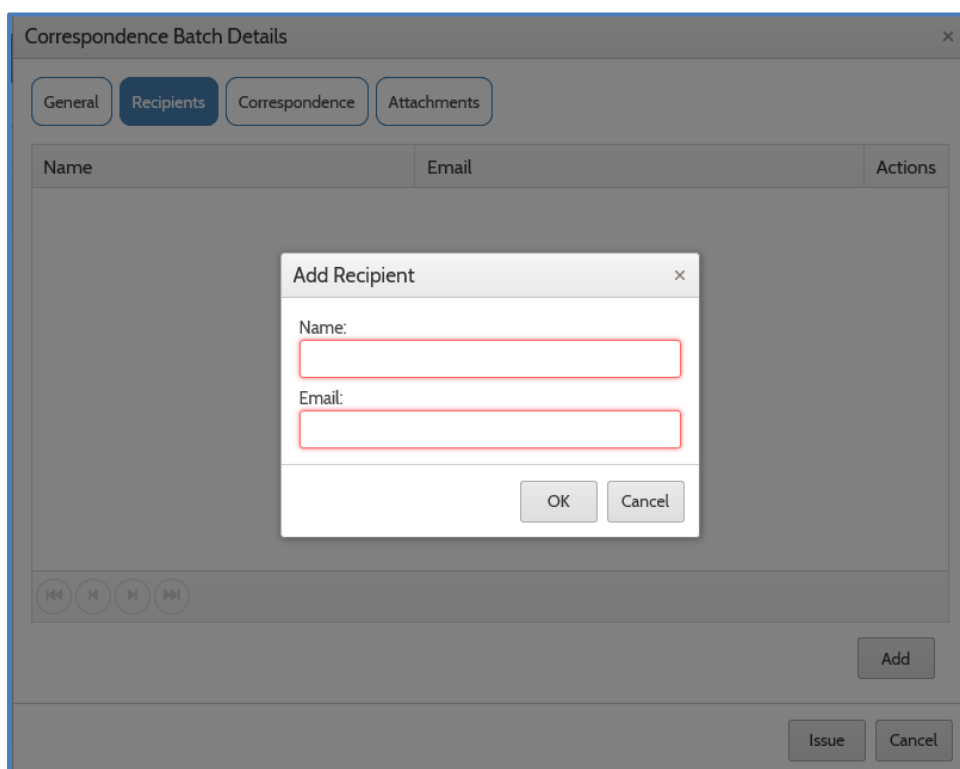
From: noreply@proactis.com

Copy To:

Subject: Confirmation of Contract Award

Issue Cancel

The Recipients Tab as noted will either be pre-completed with a list of supplier contacts or will need recipients added (The Contract Management System Buyer Users or External contacts). The example below shows the situation where External users are being contacted about the contract...



Correspondence Batch Details

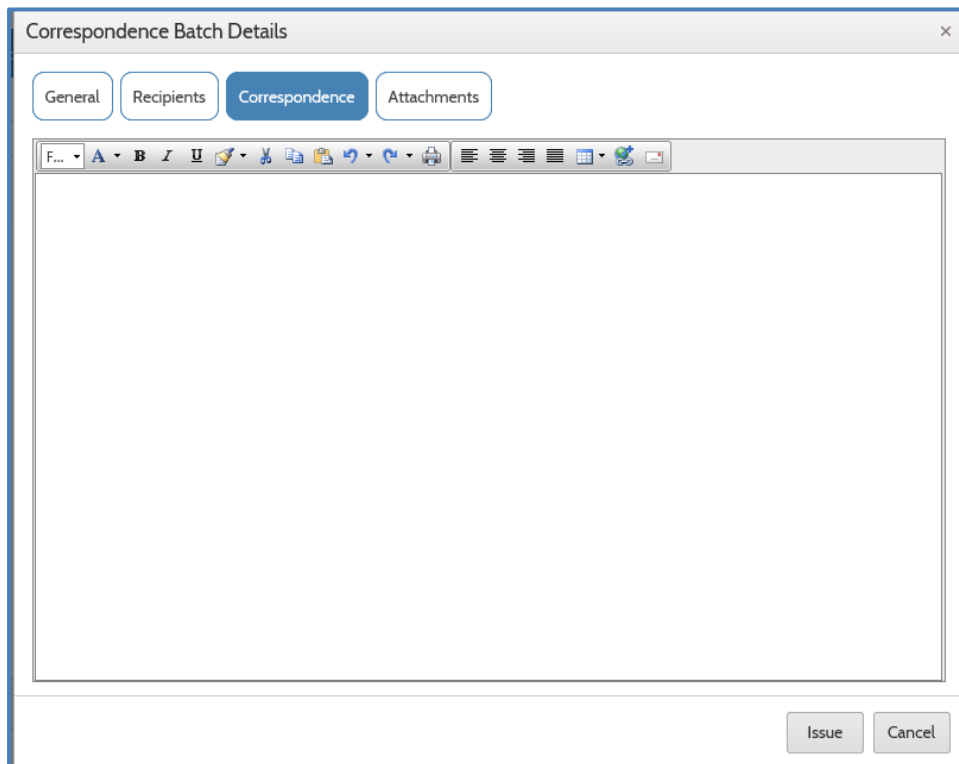
General Recipients Correspondence Attachments

Name	Email	Actions
<div> <div>Add Recipient</div> <div> Name: <input type="text"/> </div> <div> Email: <input type="text"/> </div> <div> OK Cancel </div> </div>		


Navigation: [Previous] [Next] [Add]

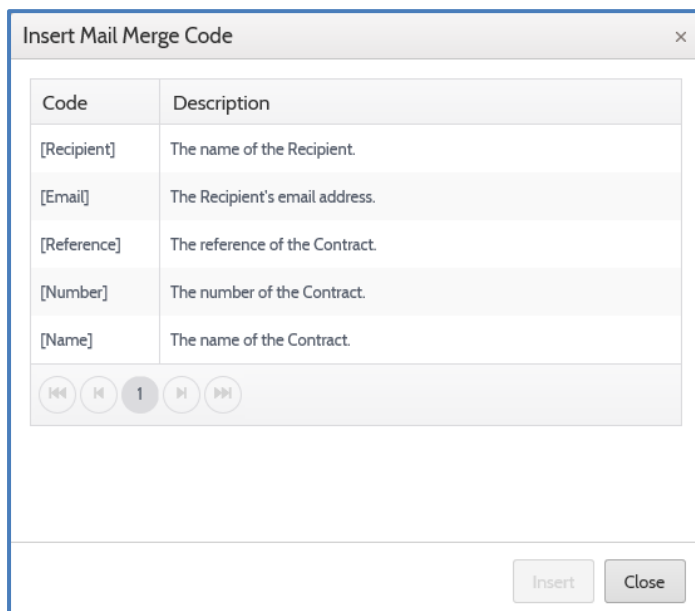
Issue Cancel

The Correspondence Tab will display and text from the batch template selected as a default or may be blank if no template was selected...



The dialog box titled "Correspondence Batch Details" features four tabs: "General", "Recipients", "Correspondence" (which is selected), and "Attachments". The "Correspondence" tab contains a large text area for composing the email body. Above this area is a rich text formatting toolbar with icons for font color, bold, italic, underline, bulleted list, numbered list, link, unlink, and insert table. At the bottom right of the dialog are "Issue" and "Cancel" buttons.

Insert the relevant text for the Body of the Email to be sent. The formatting toolbar can be used to set font size and colour, text can be aligned, and tables can be inserted. In addition mail merge fields can be used to automatically insert data from the system. To do so, click on the  button on the Formatting Toolbar, the following will be displayed...



The "Insert Mail Merge Code" dialog box displays a table of available merge codes. Below the table is a pagination control showing "1" of 1 items, and at the bottom are "Insert" and "Close" buttons.

Code	Description
[Recipient]	The name of the Recipient.
[Email]	The Recipient's email address.
[Reference]	The reference of the Contract.
[Number]	The number of the Contract.
[Name]	The name of the Contract.

Select the relevant Mail Merge Code and click **Insert**

The Attachments Tab will allow for multiple documents to be attached to the email

Correspondence Batch Details

General

Recipients

Correspondence

Attachments

Name	Type	Actions
No Documents have been found.		

Add

Issue

Cancel

Once all relevant details are complete click on the **Issue** button to send the email

5.8.13 Dialogues Tab

Contract MD20170510 - Provision of IT Goods

Go To... Save Close Complete Suspend Cancel Pull Export History

General Correspondence **Dialogues** Document Export Templates

Dialogue

No Posts have been created.

Create Thread

Post Details

Details Attachments

Posted By: Date/Time Posted:

From: To:

Subject:

To create a Dialogue for a Supplier or All Suppliers on the Contract click the **Create Thread** button

Create Thread

Message Attachments

Subject:

To:

Please select

Your Message: (4000 characters remaining)

OK Cancel

Insert a Subject, select if "All Supplier" are to receive the message or just an individual supplier, and insert the Message content. Documentation may be added to the dialogue message by accessing the **Attachments** Tab...

Create Thread

×

Message

Attachments

Name	Size	Action
No Attachments have been added.		

⏮

⏪

⏩

⏭

Add

OK

Cancel

Click **Add**

Add Message Attachment

×

Choose Document source

You may add a new Document or select one from the Library.

☒ Select a file from the Document Library.

☐ Locate a new file not in the Library.

Next >

Cancel

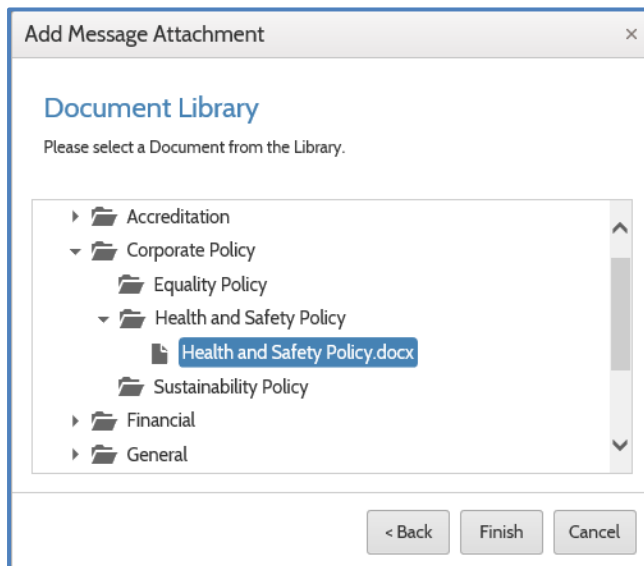
If the default to select from a Library is selected the Buying Organisation's Document Library will be displayed to select the relevant document. If the "Locate a new file not in the Library" option is selected the next page will be displayed as follows...

The screenshot shows a dialog box titled "Add Message Attachment" with a close button (X) in the top right corner. The main heading is "Choose Document type" in blue. Below it, a sub-heading reads "You may upload the new Document or create a link to the Document." There are two radio button options: "Upload the new Document." (which is selected) and "Create a link to the Document." At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

Selecting "Upload the new document" the next page when accessed will be displayed as follows...

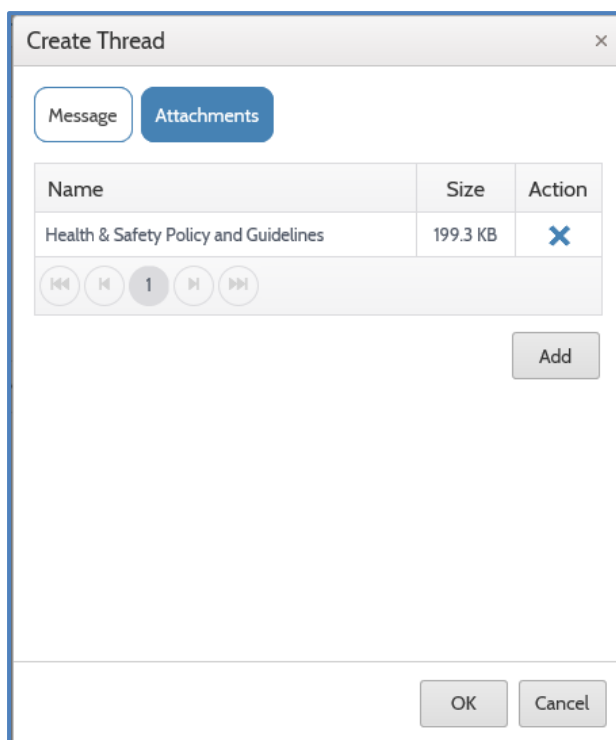
The screenshot shows the next screen of the "Add Message Attachment" dialog box, titled "Upload New Document" in blue. The sub-heading reads "Please locate and upload the new Document into the Library". There is a "File:" label followed by a text input field and a "Browse..." button. Below this is a "Description:" label followed by a larger text input field. At the bottom left, there is a checkbox labeled "Add the Document to your Library?". At the bottom right, there are three buttons: "< Back", "Finish", and "Cancel".

Click **Browse...** and navigate to and select the file to attach and insert a **Description**, and determine if the Document should be added to the Buying Organisation's Document Library. If this latter option is ticked a further series of pages will appear that will require the document to be added to the relevant Document Type folder as shown...



Select the relevant area to link the file and click **Finish**

Once this has been completed the Document is added to the Attachments Tab



Repeat as necessary and remove any attachments by clicking on the icon

Click **OK** to save all relevant details, and send the dialogue. The dialogue will be available via the Messages facility in the Supplier Network when the supplier accesses the relevant Contract.

Conversation Threads can develop as a dialogue is created and responded to by both supplier and Buying Organisation and as such dialogues will build a hierarchy based on the conversation thread. Dialogues received can be responded to by selecting the relevant dialogue and clicking on the **Reply** button, as shown below...

SRM

Sourcing

Contracts

Assessments

Transactions

Reports

More

Contract MD20170510 - Provision of IT Goods

Go To...

Save

Close

Complete

Suspend

Cancel

Pull

Export

History

General

Correspondence

Dialogues

Document Export Templates

Dialogue

Health & Safety Policy (Matt Test Organisation)

RE: Health & Safety Policy (ABC Ltd)

Create Thread

Post Details

Details

Attachments

Posted By:

Admin User

Date/Time Posted:

19/05/2017 13:17:39

From:

ABC Ltd

To:

Matt Test Organisation

Subject:

Health & Safety Policy

Please find completed document attached Thanks

Reply

5.8.14 Document Export Templates

SRM

Sourcing

Contracts

Assessments

Transactions

Reports

More

Contract MD20170510 - Provision of IT Goods

Go To...

Save

Close

Complete

Suspend

Cancel

Pull

Export

History

General

Correspondence

Dialogues

Document Export Templates

Default Document Export Template:

Official Corporate Contract Template

Title ^	Upload Date/Time	File Size	Actions
Official Corporate Contract Template	19/05/2017 14:12	2.2 KB	

Download

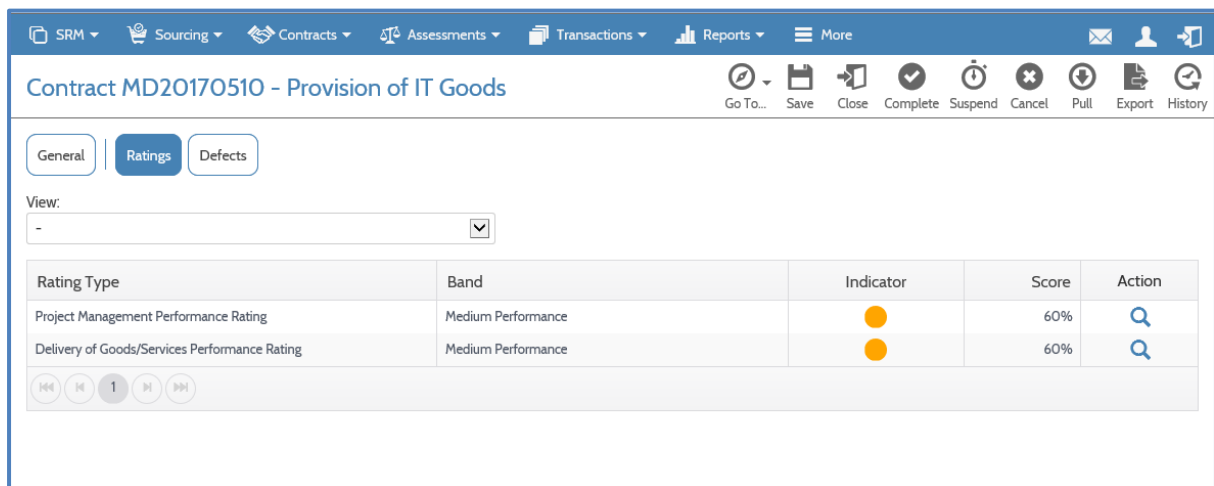
Add

For more information on the process of setting up the use of this functionality see Section **Error! Reference source not found.**



Note that the permission-based **Export** Toolbar button can be used to extract the final document containing Contract-specific information held in the Data Source

5.8.15 Ratings Tab



Contract MD20170510 - Provision of IT Goods

Go To... Save Close Complete Suspend Cancel Pull Export History

General Ratings Defects

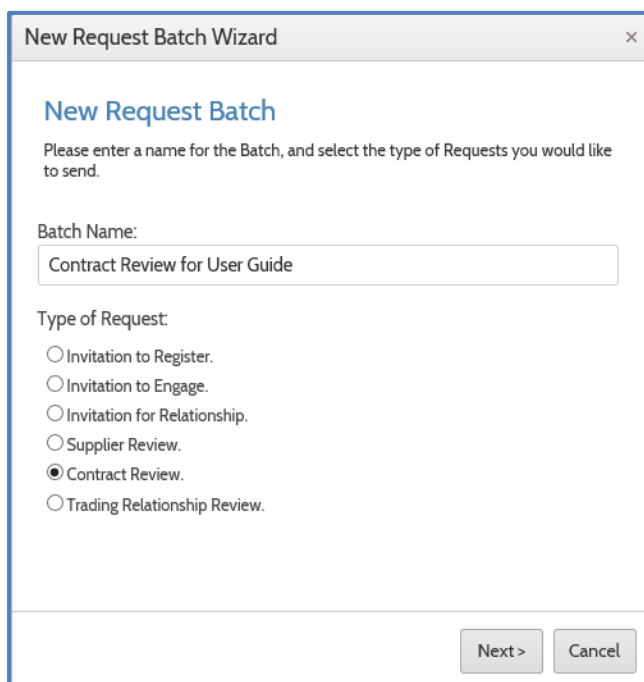
View: -

Rating Type	Band	Indicator	Score	Action
Project Management Performance Rating	Medium Performance	●	60%	Q
Delivery of Goods/Services Performance Rating	Medium Performance	●	60%	Q

Navigation: 1

This is a Read Only page and the View filter can be used to toggle between Suppliers or view the overall Contract Performance Ratings.

Within SRM access the Requests area within the Batches menu option and add a new Batch...



New Request Batch Wizard

New Request Batch

Please enter a name for the Batch, and select the type of Requests you would like to send.

Batch Name:

Contract Review for User Guide

Type of Request:

- ☐ Invitation to Register.
- ☐ Invitation to Engage.
- ☐ Invitation for Relationship.
- ☐ Supplier Review.
- ☒ Contract Review.
- ☐ Trading Relationship Review.

Next > Cancel

Select the Contract Review option as above and click **Next**

New Request Batch Wizard

New Contract Review Batch

Please choose the SRM Template on which your Batch will be based.

SRM Template:

Review Test

< Back Next > Cancel

Select an appropriate SRM Template – NOTE: this must contain a Questionnaire that has Sections linked to a Rating Type (see the SRM User Guide for more information on SRM Templates).

Click **Next**

New Request Batch Wizard

New Contract Review Batch

Please specify the details of the review.

Contract to Review:

...


Who will perform the Review?

☒ The Suppliers themselves.

☐ Users within my Organisation.

☐ External Users.

< Back Finish Cancel

Click  to open the pop up dialog below which will allow for Contracts to be searched for and for a specific contract to be selected as the review subject.

Select Contract

Search where:

Contains:

Contract Number

Q

M

	Reference	Name	Type
<input checked="" type="radio"/>	MD20170510	Provision of IT Goods	Standard Contract
<input type="radio"/>	EREQ1000186	Scoring Project - ABC Ltd/Lot 1 - IT Ha...	Standard Contract
<input type="radio"/>	EREQ1000186	Scoring Project - ABC Ltd/Lot 2 - IT So...	Standard Contract
<input type="radio"/>	EREQ1000186	Scoring Project - DMD Enterprises/Lot...	Standard Contract
<input type="radio"/>	MD201705101	Provision of IT Related Goods and Ser...	Standard Contract
<input type="radio"/>	MD101	Initial Test Contract for CIS Payments	Standard Contract
<input type="radio"/>	EREQ1000006	DPS 1 - Default	Standard Contract
<input type="radio"/>	EREQ1000014	test for contracts	Standard Contract
<input type="radio"/>	EREQ1000013	DPS - Build 10 - Default	Standard Contract
<input type="radio"/>	EREQ1000016	DPS Part 2 Work Item - Default	Standard Contract

1

2

3

4

5

6

OK

Cancel

Further, determine who will respond to the Questionnaire – the Suppliers themselves (Self Review), Users within my Organisation (Buyer Users), External Users (contacts that do not use the Buyer Portal whereby details of the Contract and their email address can be determined).

Click **Finish**

SRM

Sourcing

Contracts

Assessments

Transactions

Reports

More

Save

Close

Delete

Issue

Request Batch - Contract Review for User Guide

General

Suppliers

Questionnaire

Recipients

Correspondence

Batch Number:

Not Allocated

Batch Name:

Contract Review for User Guide

Type of Request:

Contract Review

Contract Being Reviewed:

MD20170510 - Provision of IT Goods

SRM Template:

Review Test

Date/Time of Initial Request:

Batch Status:

Not Issued

Target Maximum Value:

Responses Received:

0/0

0%

100%

Responses Scored:

0/0

0%

100%

The SRM Request batch is then displayed.

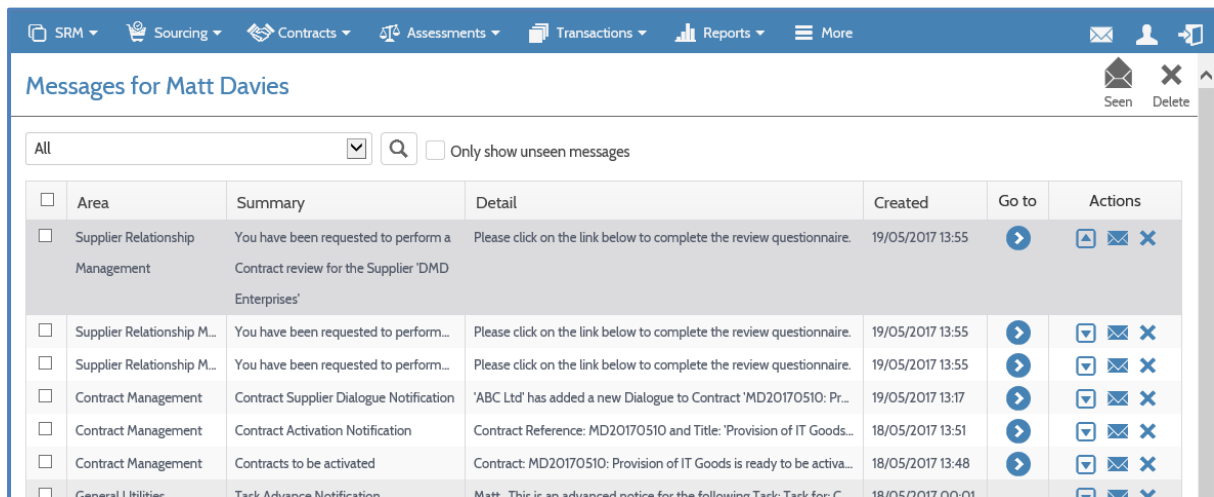
The Suppliers Tab will list the Suppliers on the Contract that will be reviewed as part of this process. **IMPORTANT:** it is assumed that all Suppliers will be reviewed for consistency. As such if Suppliers are removed they cannot be added back in.

The Questionnaires Tab is Read Only as that is maintained in the SRM Template.

Suppliers are reviewing themselves then this Tab will not be displayed as the default SRM Contact for the Supplier Organisation will be contacted. If Buyer Users are performing the review of each supplier on the contract those users will need to be defined, and further if External Users is set then adding a contact will require a name and email address to that the recipient can receive an email to open a weblink to complete a questionnaire.


Each Recipient receives an individual email for each Supplier that is required to be reviewed.

The Batch once defined appropriately will need to be Issued. If Buyer Users are responding to the review request they will receive an email and system message to notify them. The System Message will include the ability to open the Questionnaire as a new Tab in the Web Browser, as shown...



<input type="checkbox"/>	Area	Summary	Detail	Created	Go to	Actions
<input type="checkbox"/>	Supplier Relationship Management	You have been requested to perform a Contract review for the Supplier 'DMD Enterprises'	Please click on the link below to complete the review questionnaire.	19/05/2017 13:55	Go to	View Reply Delete
<input type="checkbox"/>	Supplier Relationship M...	You have been requested to perform...	Please click on the link below to complete the review questionnaire.	19/05/2017 13:55	Go to	View Reply Delete
<input type="checkbox"/>	Supplier Relationship M...	You have been requested to perform...	Please click on the link below to complete the review questionnaire.	19/05/2017 13:55	Go to	View Reply Delete
<input type="checkbox"/>	Contract Management	Contract Supplier Dialogue Notification	'ABC Ltd' has added a new Dialogue to Contract 'MD20170510: Pr...	19/05/2017 13:17	Go to	View Reply Delete
<input type="checkbox"/>	Contract Management	Contract Activation Notification	Contract Reference: MD20170510 and Title: 'Provision of IT Goods...	18/05/2017 13:51	Go to	View Reply Delete
<input type="checkbox"/>	Contract Management	Contracts to be activated	Contract: MD20170510: Provision of IT Goods is ready to be activa...	18/05/2017 13:48	Go to	View Reply Delete
<input type="checkbox"/>	General Utilities	Task Advance Notification	Matt: This is an advanced notice for the following Task: Task for: C...	18/05/2017 00:01	Go to	View Reply Delete

Clicking the Go To button (or using the link in the email) opens...



Questionnaire | Matt Test Organisation

Validate

Save Draft

Submit

Review Information

Review Type

Contract Review

Requested By

Matt Test Organisation

Contract Under Review

MD20170510 - Provision of IT Goods

Date of Request


19/05/2017 13:55:19

Please complete the following questionnaire from Matt Test Organisation. Your answers will be automatically saved every five minutes. You can also hit the Save button at any time if you want to stop and finish off later.

Click or touch the headings to expand each section. You must fill in all questions with a * next to them.

1: Section 1 (2 questions)

2: Section 2 (3 questions)

Powered by

PROACTIS
The Spend Control Company

This is then submitted

NOTE: If any documents were attached to the SRM Template these will be displayed here.

Once Submitted, the Responses can be Scored within SRM (here the SRM Templates should be set up to inform certain users when the responses are received and ready to be scored)

Response to Contract Review - Matt Davies

Save Close Submit Supplier

General Questionnaire

Jump to Section

Section 1

Section 2

Q 1.01: Question 1

A: Answer to Section 1 Question 1

Q 1.02: Question 2

A: Answer to Section 1 Question 2

Section 2

Q 2.01: Question 2.1

A: Answer to Section 2 Question 1

SCORING

Auto: Manual:

N/A 0

Scorer Comments:

The Scores are set and then Submitted

The Ratings will display immediately on the Contract as below...

Contract MD20170510 - Provision of IT Goods

Go To... Save Close Complete Suspend Cancel Pull Export History

General Ratings Defects

View: -

Rating Type	Band	Indicator	Score	Action
Project Management Performance Rating	Medium Performance	●	60%	🔍
Delivery of Goods/Services Performance Rating	Medium Performance	●	60%	🔍

The default View is to display the statistics for ALL SUPPLIERS – that is, Contract Level Ratings.

The **View** filter can be used to select a specific Supplier and view their Statistics. Selecting 🔍 will display a pop up that shows all the data from all reviews

5.8.16 Defects Tab

The screenshot shows the 'Defects' tab for contract 'MD20170510 - Provision of IT Goods'. The interface includes a top navigation bar with tabs for SRM, Sourcing, Contracts, Assessments, Transactions, Reports, and More. Below this is a sub-header with icons for Go To..., Save, Close, Complete, Suspend, Cancel, Pull, Export, and History. The main content area has three tabs: General, Ratings, and Defects. The Defects tab is active, showing a 'Supplier:' dropdown menu set to 'All Suppliers'. Below this is a table with columns: Defect Number, Date Raised, Supplier, Defect Type, Severity, Defect Points, Status, and Actions. The table is currently empty, displaying the message 'No Defects were found for the specified supplier(s)'. At the bottom right of the table area is an 'Add' button, which is highlighted by a blue arrow pointing from the text below.

There is a View filter that can be set as shown so that all or supplier-specific defects can be viewed. Defects are always specific to an individual supplier.

To Add a new defect, click on the **Add** button. The following pop-up dialog will be displayed...

The 'Add Defect' dialog box contains the following fields and controls:

- Supplier:** A dropdown menu with 'ABC Ltd' selected.
- Defect Type:** A dropdown menu with 'Defect' selected.
- Severity:** A dropdown menu with 'High Severity' selected.
- Points:** A text input field containing the value '0'.
- Description:** A text area with a red border and a placeholder '(4000 characters remaining)'.
- Defect Code:** A text input field.
- Required Action:** A text input field.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

- Select the Supplier from the drop-down list
- Select the Defect Type from the drop-down list
- Select the Severity from the drop-down list (the associated points/value) will be populated based on this. The Points can be over-written from the default set in the Configuration of the Module. **NOTE:** if this is not available the reason will be the user logged in does not have the Role Permission to “Set Defect Severity”
- Insert a Description for the defect – this is mandatory
- Insert a Defect Code (if required)
- Insert a Required Action
- Click **OK**
- Click **Save** on the Toolbar to save the Contract changes

When a Defect is added it is set with a status of “OPEN”. The Defect Number is assigned based on the number sequence set in the Contract Management Configuration or the Contract Template Configuration and is only set when **Save** has been selected on the Toolbar.

A sample defect is shown below...

Contract MD20170510 - Provision of IT Goods

Go To... Save Close Complete Suspend Cancel Pull Export History

General Ratings Defects

Supplier:
ABC Ltd

Defect Number	Date Raised	Supplier	Defect Type	Severity	Defect Points	Status	Actions
CD1000001	19/05/2017	ABC Ltd	Breach of Contract	High Severity	100	Open	

1

Add

To amend the defect/its status click on the relevant icon. The following pop-up dialog will be opened...

Edit Defect

Number: CD1000001

Supplier: ABC Ltd

Status: Open

Defect Type: Breach of Contract

Severity: High Severity

Points: 100

Description: (3937 characters remaining)
The Supplier has failed to deliver the goods by the agreed time

Defect Code:

Required Action: Suspend the Supplier whilst the delivery is checked with the Supplier

Created On: 19/0 By: Matt Davie

OK Cancel

The Status can be changed to **Open** / **Withdrawn** / **Closed**

The Severity and Points can be amended along with the Description, Defect Code, and Required Action.

Click **OK**, and don't forget to click **Save** on the Toolbar also.

To view the Defect, click on the relevant  icon

To remove a Defect, click on the relevant  icon

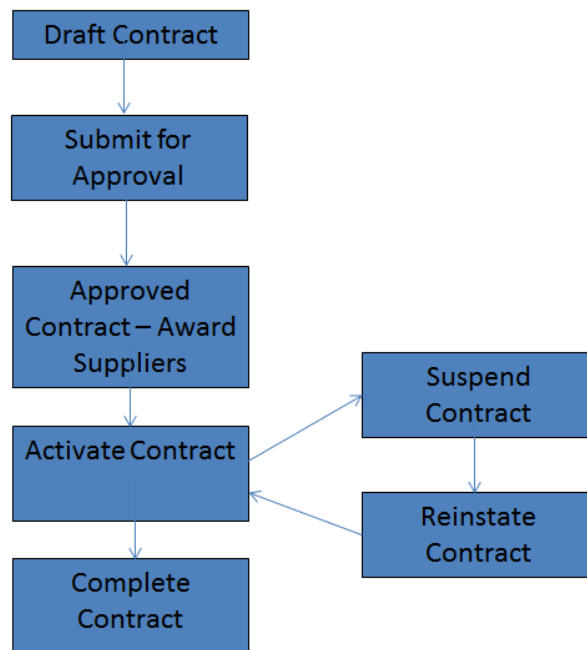
5.8.17 Custom Tabs/Reference Fields on a Contract

As noted in this User Guide, "Reference Fields" can be created for additional data requirements and be made available for Users to maintain.

6 Contract Management Processes

6.1 Introduction

The Contract Management Workflow or Lifecycle will run as follows...



NOTE: at each stage below notifications can be sent to relevant users associated with the contracts that have the ability to perform the task in hand (e.g. Award Suppliers, Approve Contracts, Activate Contracts, etc.). This functionality can be switched off in the Contract Settings on a template (School/Division) basis.

6.2 Approving a Contract

All Contracts that are created will appear with a “Draft” status until they have been approved.

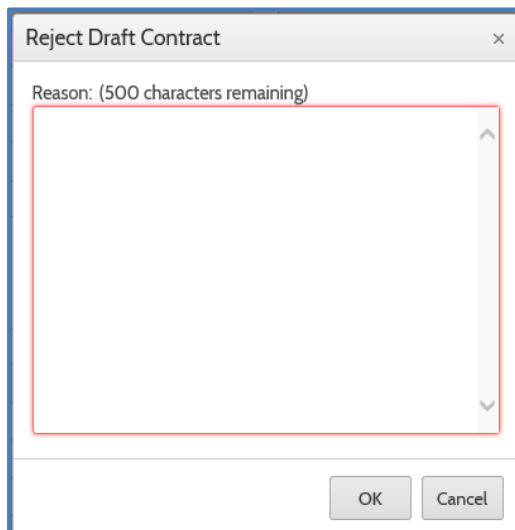


If a Draft Contract is accessed and the **Submit** button on the Toolbar is selected, the Contract will be sent for approval. Those users who have the relevant permission to approve a contract will be able to mark the contract as Approved. Note when the Contract is submitted for Approval, there will be a check against the Contract Settings to ensure the appropriate data has been provided for this stage of the process - that is, the Contract has suppliers, items where appropriate etc. If there are data elements missing the User will be warned by a System Message that will be displayed. Correct the data or press OK if this pop-up dialog appears.

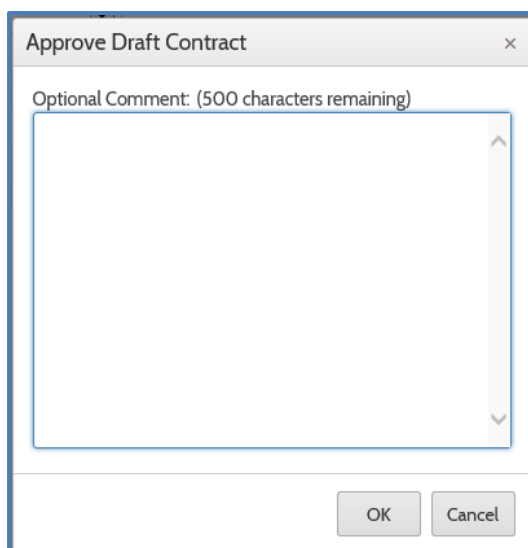
If the data is appropriate, a message will the draft contract should be submitted this draft. Click **OK** to continue. The Contract Status will be updated to “Being Approved” at this point also.



Users who can Approve a contract will see **Approve** **Reject** buttons on the Toolbar of the Contract record. Clicking **Reject** will open up a mandatory pop-up dialog which looks like ...


A dialog box titled "Reject Draft Contract" with a close button (X) in the top right corner. Below the title bar, there is a text label "Reason: (500 characters remaining)" followed by a large, empty text area with a red border and a vertical scrollbar on the right. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Alternatively, clicking **Approve** will open an optional pop-up dialog which looks like ...

A dialog box titled "Approve Draft Contract" with a close button (X) in the top right corner. Below the title bar, there is a text label "Optional Comment: (500 characters remaining)" followed by a large, empty text area with a blue border and a vertical scrollbar on the right. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

6.3 Awarding a Contract

The "Award" icon is only visible within the ribbon bar if the Contract is Approved.

Open the relevant Contract to be awarded and click on the  **Award** Toolbar button. An Award Suppliers wizard will display:

Award Suppliers Wizard

Award Suppliers Wizard - Select Suppliers

Please select the Suppliers you would like this Contract to be awarded to by ticking the relevant boxes in the list below.

Name	Current Status	Award?
ABC Ltd	New	<input type="checkbox"/>

⏪
⏴
1
⏵
⏩

Next >
Cancel

Select which suppliers you wish to award the Contract to by clicking the Award? box next to the relevant supplier name. Click **Next** to continue.

Award Suppliers Wizard

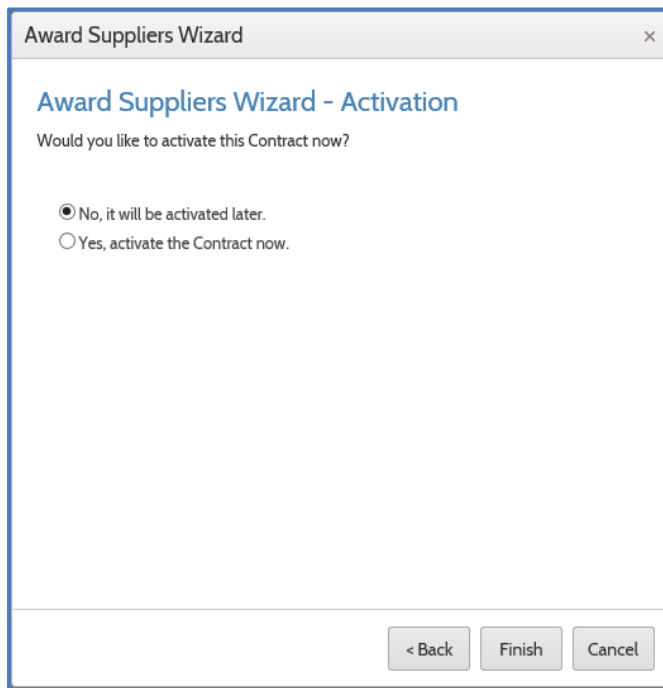
Award Suppliers Wizard - Acceptance Correspondence

Please specify whether you need to send Acceptance Correspondence.

☒ No, don't send Acceptance Correspondence.
☐ Yes, send Acceptance Correspondence.

< Back
Next >
Cancel

Specify whether to send Acceptance Correspondence to the supplier(s) or not. If “Yes, send Acceptance Correspondence” is selected the next page will require the Correspondence Template to be used for the communication. Click **Next**



Award Suppliers Wizard

Award Suppliers Wizard - Activation

Would you like to activate this Contract now?

☒ No, it will be activated later.
☐ Yes, activate the Contract now.

< Back Finish Cancel

Select whether you wish to activate the contract now or later. Click **Finish**

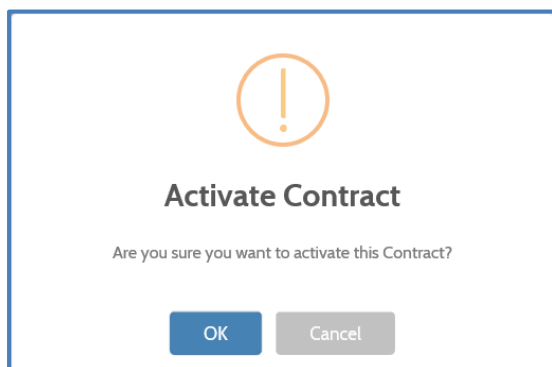
6.4 Activating a Contract

Go through the above steps under section “Awarding a Contract” and on the final stage of the award wizard, select “Yes, activate the Contract now”. If “No” was selected first time around then you can activate later.

You can only activate contracts with a status of “Approved”.



Go into the Approved Contract and select **Activate** on the Toolbar. A pop-up dialog will appear:



!

Activate Contract

Are you sure you want to activate this Contract?

OK Cancel

Click **OK**. The status of the contract will be updated to Active.

IMPORTANT: If the value of the contract is set manually it cannot be changed once the Contract has been set to a Status of “Active” or beyond.

NOTE: If the Contract Settings have been determined to Output the Contract on Activation, this process (where Items are included on the Contract) will require each Contract Item to have an

External Code set. As such there is a warning if one item or more has not been set with the required External Code

6.5 Suspending/Re-instating a Contract

You can only suspend contracts with a status of Active.



Go into the Approved Contract and select **Suspend** from the Toolbar. A pop-up dialog will appear:

Enter a reason then click **OK**. The status of the contract will be updated to Suspended.




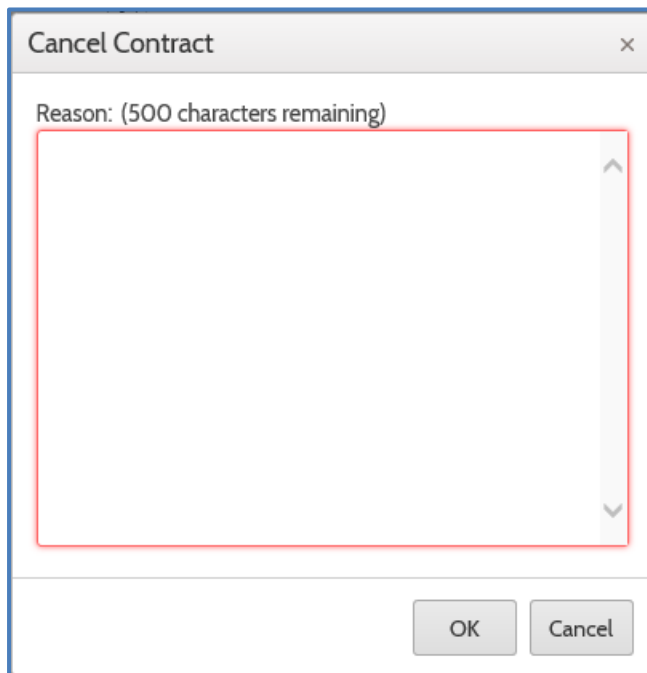
To re-instate the Contract, go into the Suspended Contract and select **Activate** from the Toolbar. A pop-up dialog will appear:

Click **OK**. The status of the contract will be updated to Active.

6.6 Cancelling a Contract

The Cancel Contract icon is only visible within the ribbon bar if the Contract is Approved.

Open the relevant Contract to be cancelled and click on the  **Cancel** Toolbar button. A pop-up dialog will open to insert comments as below ...

A screenshot of a 'Cancel Contract' dialog box. The dialog has a title bar with the text 'Cancel Contract' and a close button (X). Below the title bar, there is a text label 'Reason: (500 characters remaining)' followed by a large, empty text area with a red border and a vertical scrollbar on the right. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

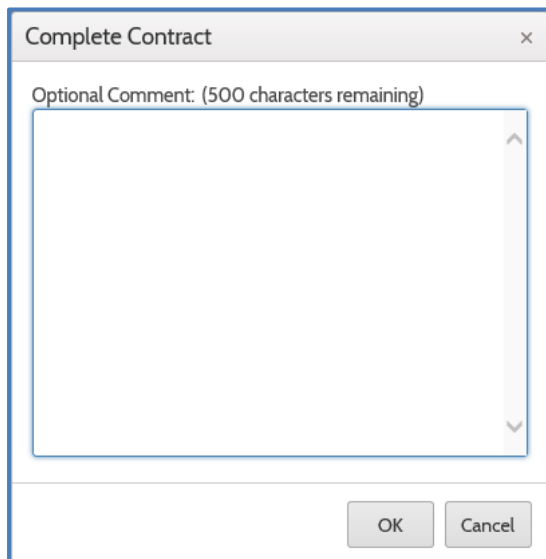
Click **OK**

This will update the Status of the Contract to be “Cancelled”. Cancelled Contracts can be Activated or Deleted required.

6.7 Completing a Contract

You can only complete contracts with a status of Active.

Go into the Approved Contract and select  **Complete** from the Toolbar. A pop-up dialog will appear:



Complete Contract

Optional Comment: (500 characters remaining)

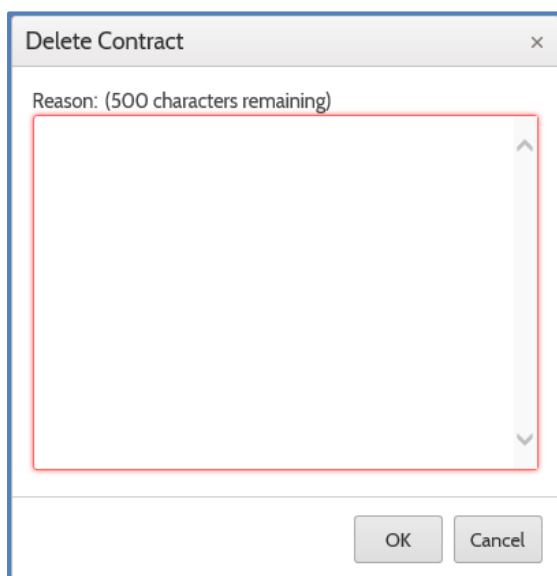
OK Cancel

Provide a Comment if required and click **OK**. The Contract End date will be set to today's date at this point. If a Contract has been "Completed" by mistake it can be Activated again.

6.8 Deleting a Contract



Open the relevant Contract to be deleted and click on the **Delete** Toolbar button. NOTE: Activated Contracts cannot be Deleted. A pop-up dialog will open to insert comments as below...



Delete Contract

Reason: (500 characters remaining)

OK Cancel

Click **OK**

7 Contract Management in the Supplier Network

The Contract Management Module interacts with the PROACTIS Supplier Network. Registered Suppliers can view active contracts that they are associated with.

The screen shot below shows the Supplier's Dashboard displayed once a supplier has logged into the Supplier Network.



Notice the **Contracts** options

Accessing the Contracts area displays the following...

Search

Filters

Reference	Number	Contract Name	Customer Name	Projected Contract Value	Awarded Date	Status	Show Me
DMD111231	1000043	Provision of Laptop Accessories	Matt Test Organisation	GBP 200.00	07/04/2016 11:33	Active	

New Message

Please enter a subject and text below to send a new message to the customer.

Subject

Text

Attach files...

Or drag and drop files here

Send

Cancel

EREQ1000039	1000041	Standard Tender Test - Lot 2	Matt Test Organisation	GBP 300.00	07/04/2016 10:58	Active	
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