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

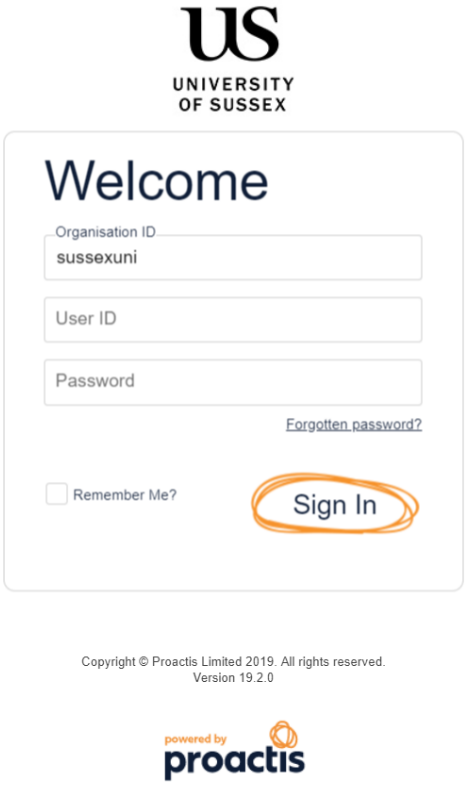
Access
If you do not already have an account, you will need to complete the Request for Access form and send this to contact **rt-finance-servicedesk@sussex.ac.uk**. The form can be found on the Procurement and Commercial Services page here:

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.

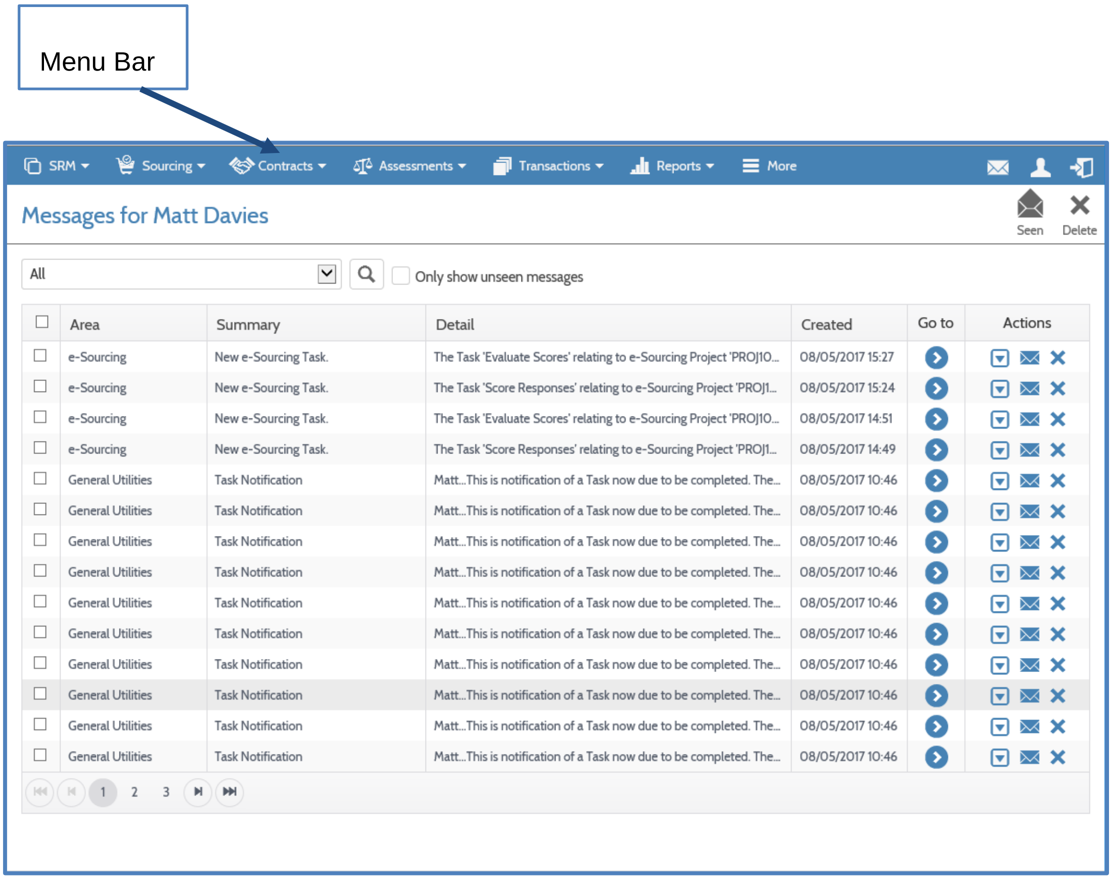
To login to The Contract Management System…

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

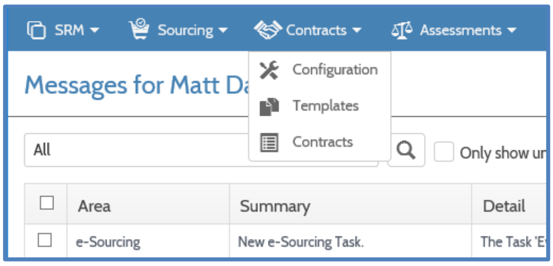


2. Insert your Organisation ID (Sussexuni), User Name and Password. If you have trouble logging in, please contact **rt-finance-servicedesk@sussex.ac.uk** . NOTE: if you tick the checkbox for "Save login details" the Organisation ID and User Name will be remembered on the PC being used.

   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

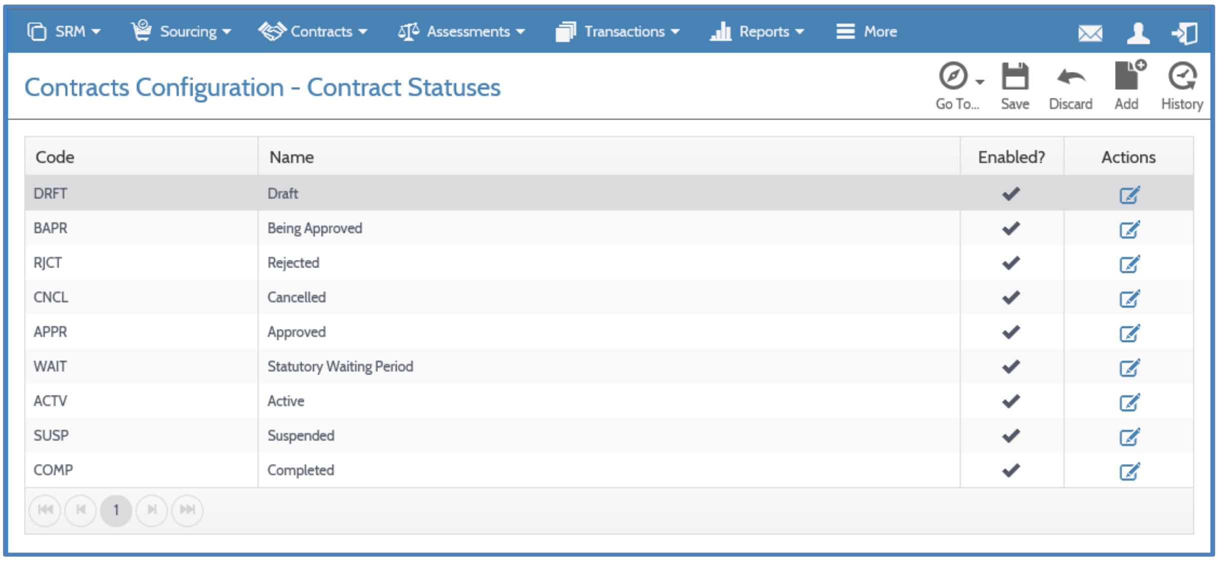
Responsibility for access to contracts rests with the Senior Responsible Officer for each contract. Unless otherwise specified in the contract governance structure, this will default to Heads of School/Directors of Professional Services. The University's Contract Access Form must be completed, signed 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.

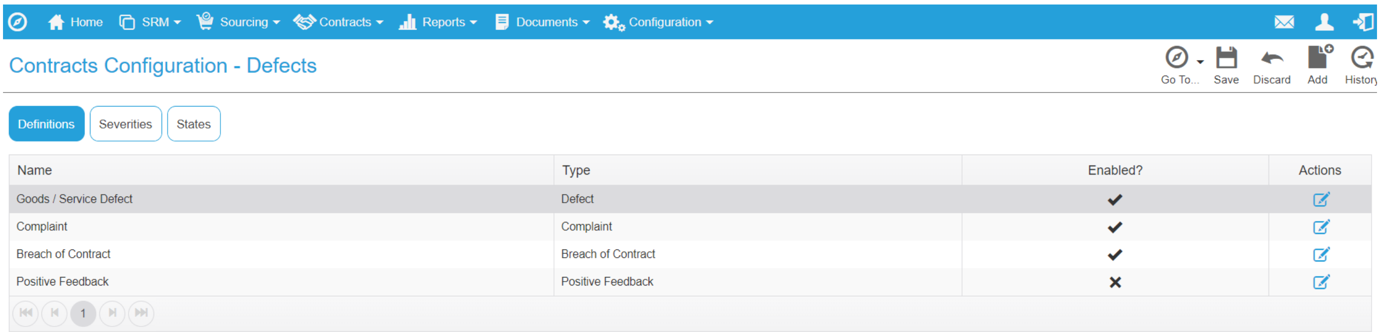
3.1 Contract Statuses



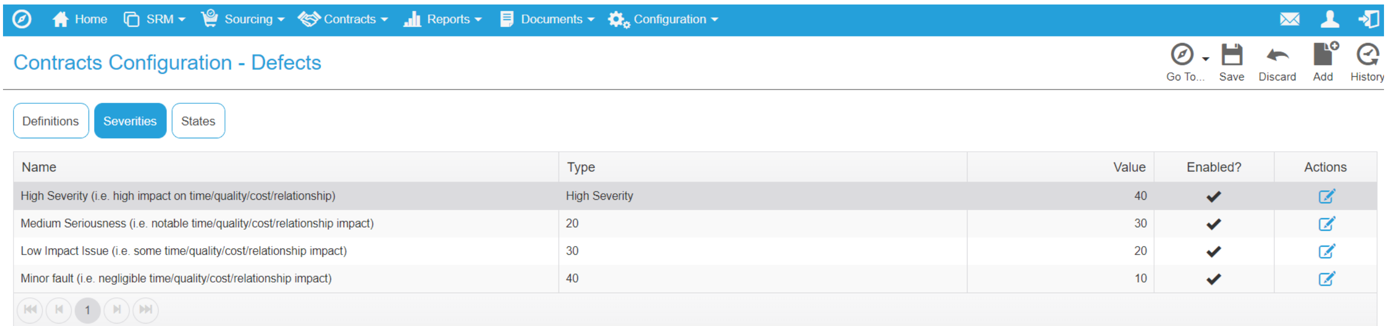
A Contract's Status will change over time from its initial draft through to the contract being completed. The Contract Management Module has pre-determined Statuses that are invoked automatically depending on what action has been performed on the contract.

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…

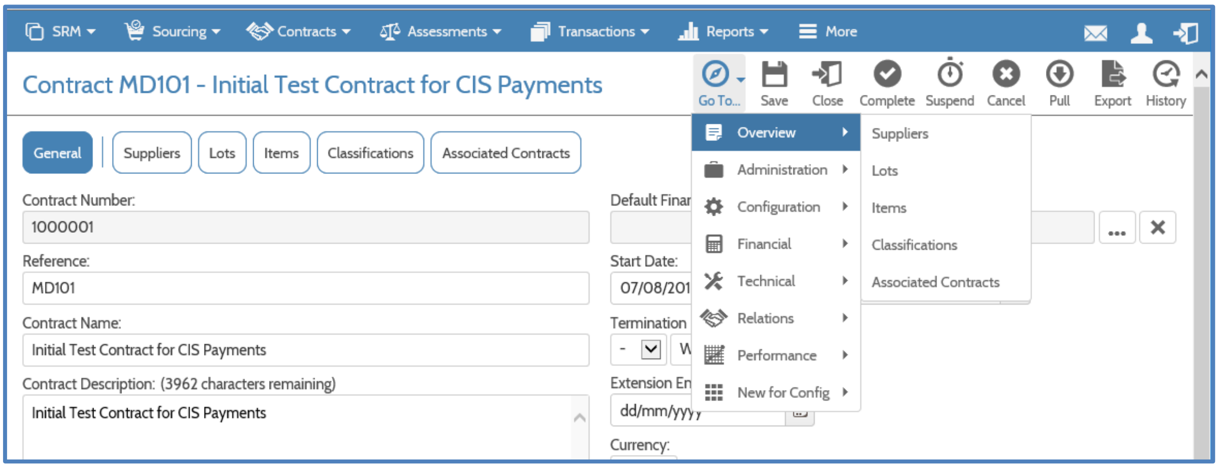


The **Severities Tab** when accessed will be displayed as follows…

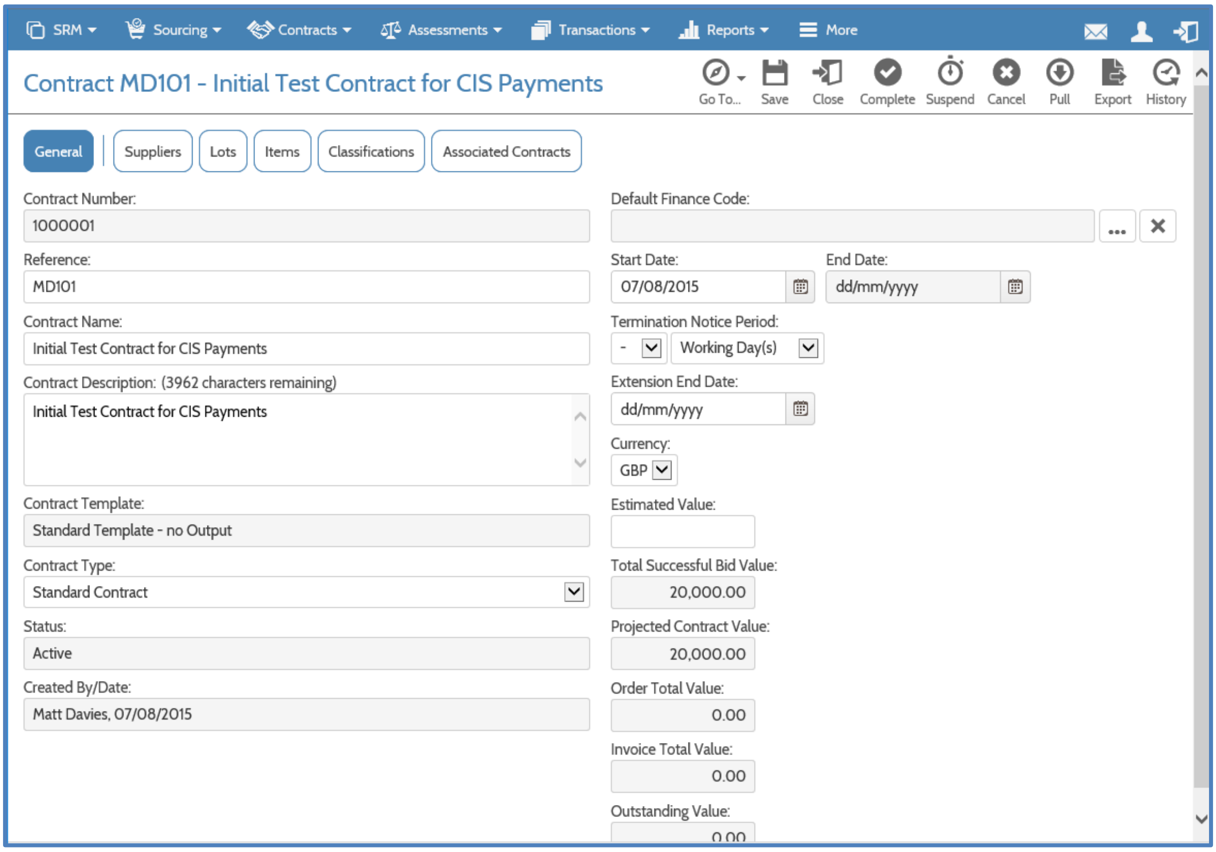


3.2.1 Introduction to Tab

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



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…



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.

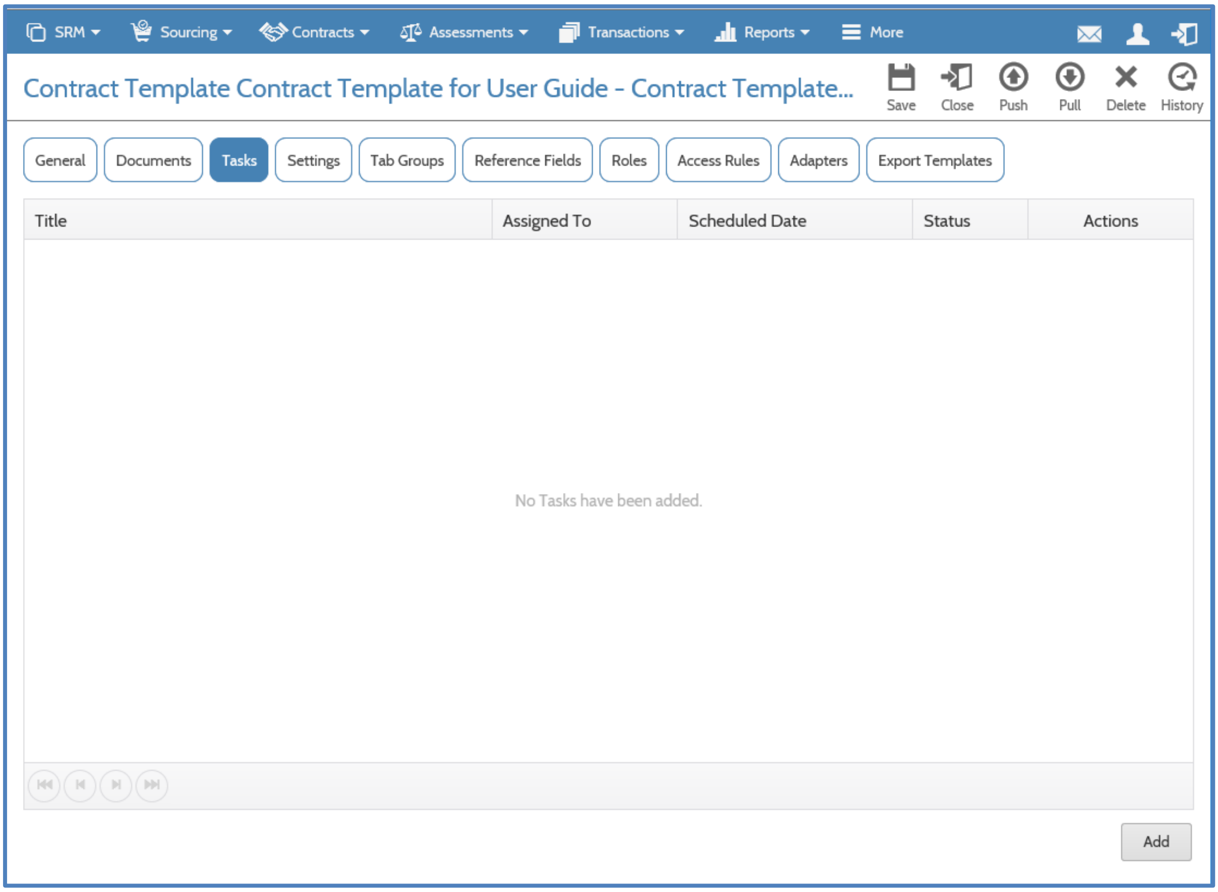
- **Requests to approve Variations** – sent to users who have the permission to approve variations on a contract.

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



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".

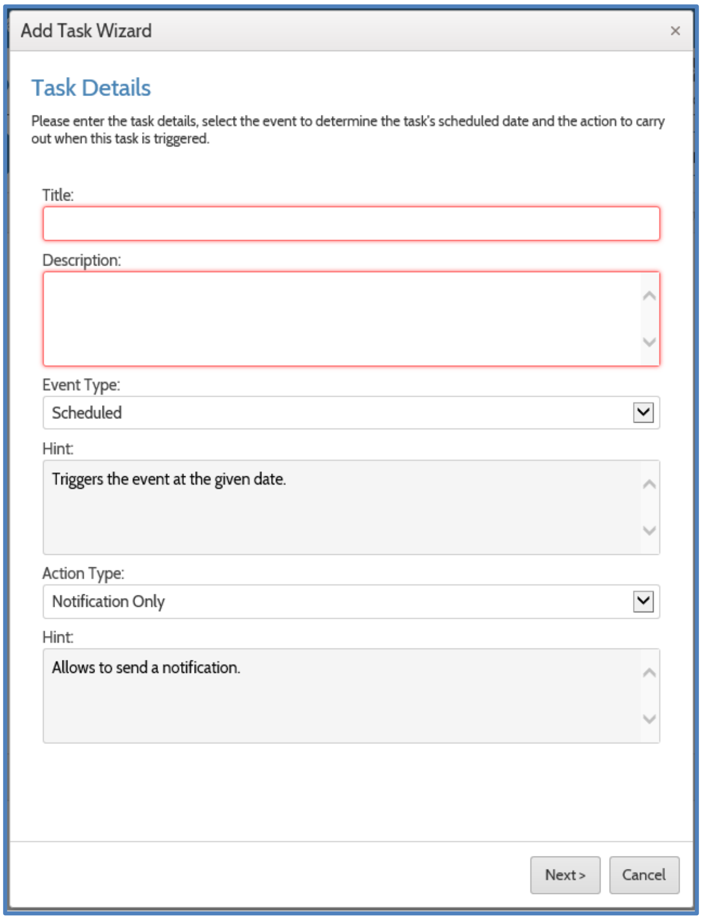
Tasks can also have Notifications:

- 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:

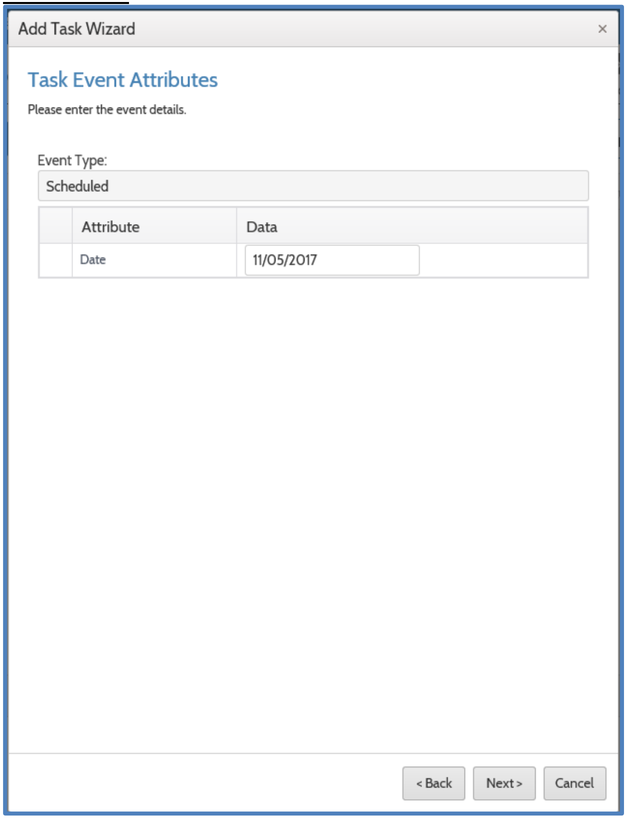
Event Type	Description
Scheduled	Triggers the event at the given date. Attributes such as Date Field will be available to set.
Contract End	Triggers the event based on the scheduled end-date for a contract. Attributes such as Days Before will be available to set.
Contract Start	Triggers the event based 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.

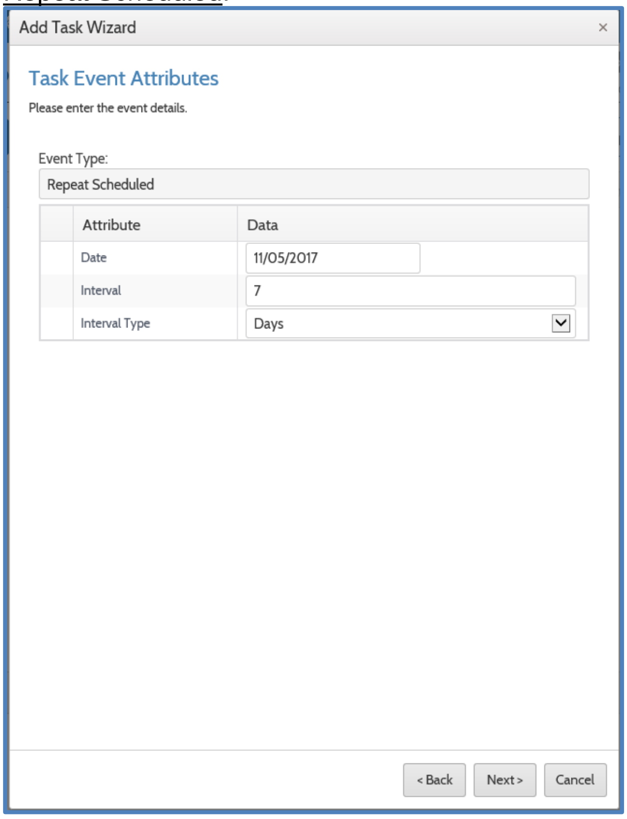
4. Once these have been set, click “Next”
5. The next page will provide relevant Event Type based options. Each Event Type and option is displayed below:

Scheduled:



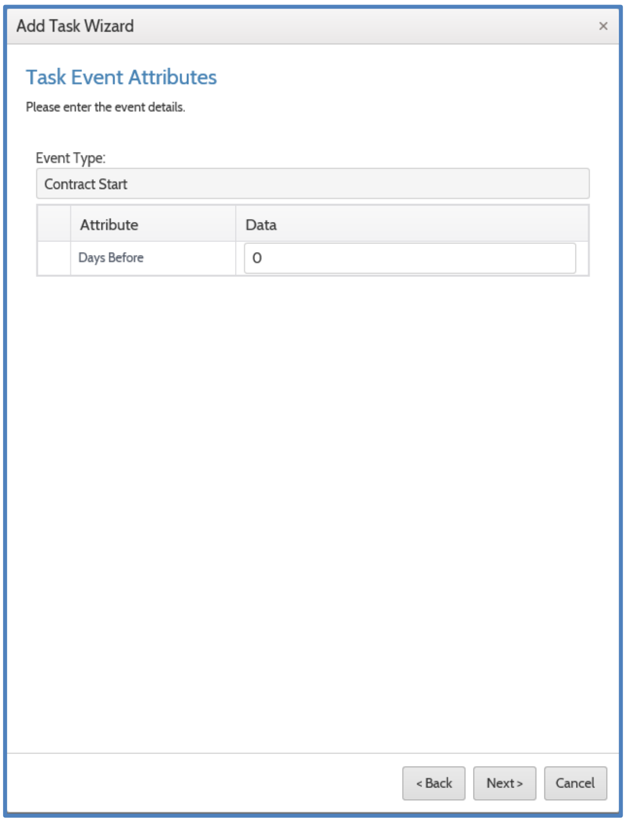
Here a specific date can be set for the Event to Occur

Repeat Scheduled:



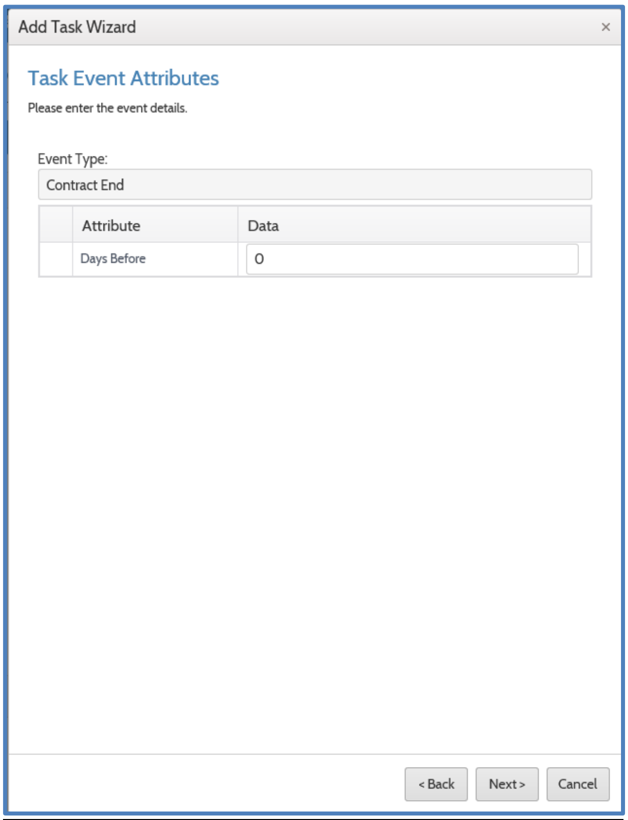
6. Here a specific date can be determined as a start point for the initial event and an interval and type can be determined for subsequent events to occur

<u>Contract Start:</u>



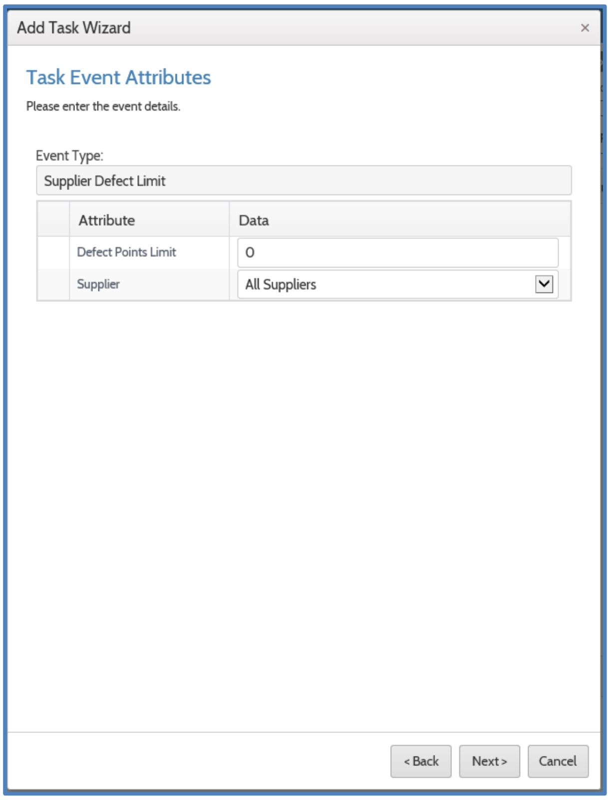
Here the number of days before the Contract Start date will trigger an event

Contract End:



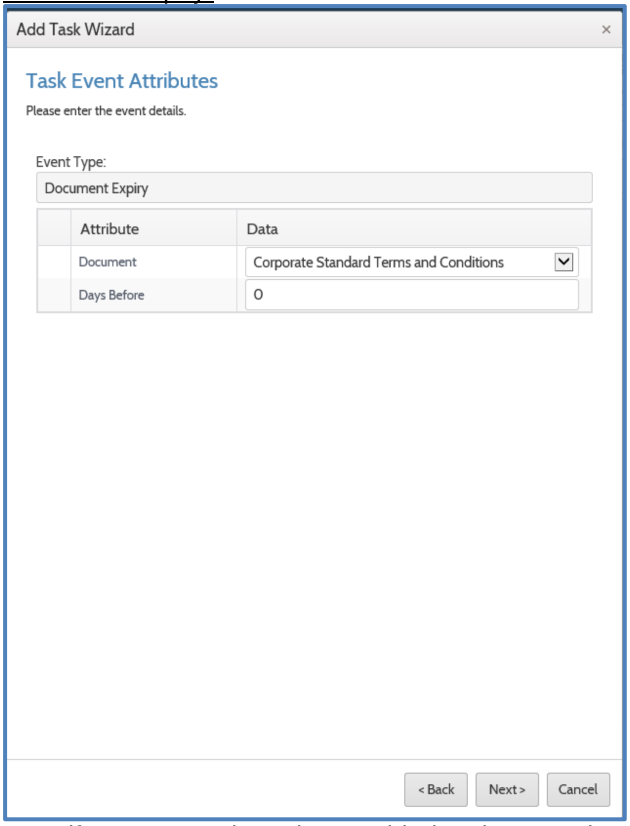
Here the number of days before the Contract End date will trigger an event

Supplier Defect Limit:



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

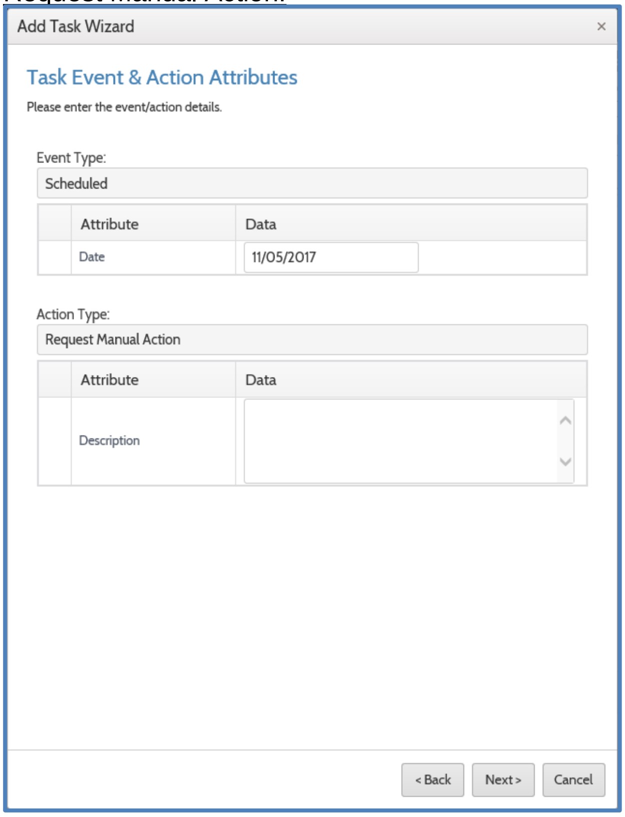
Document Expiry:



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:

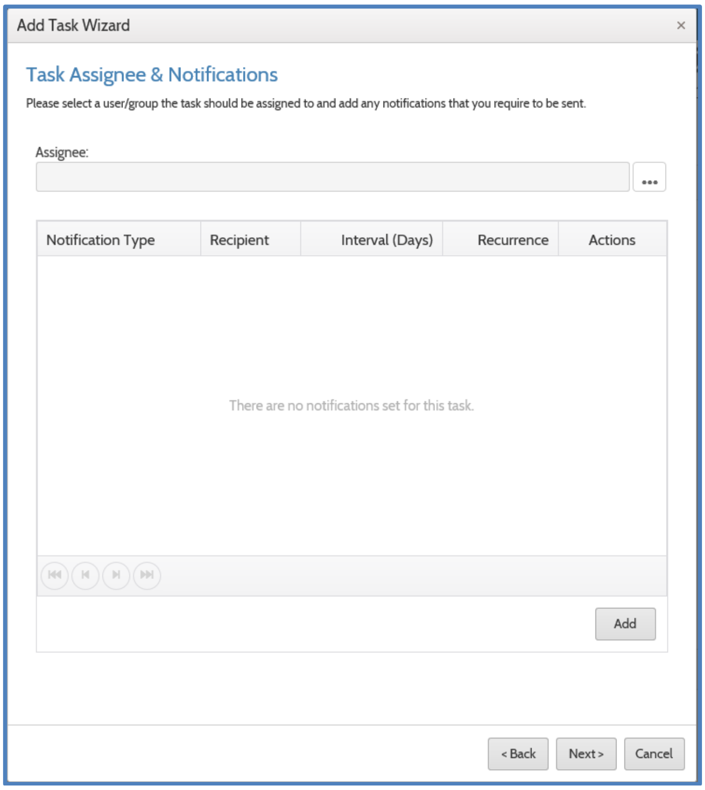
Request Manual Action:



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”

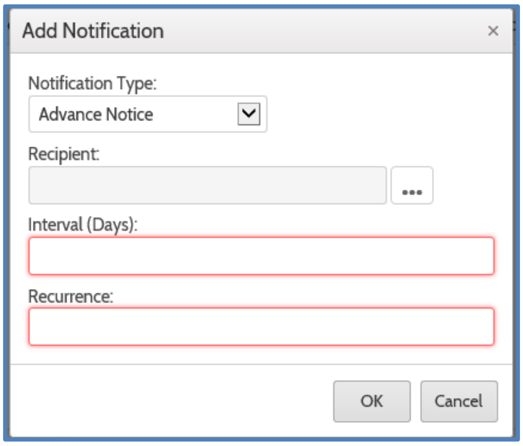
7. The next page will allow Notifications to be determined. Further, if the “Action Type” has been set to “Request Manual Action” an “Assignees” option displays:



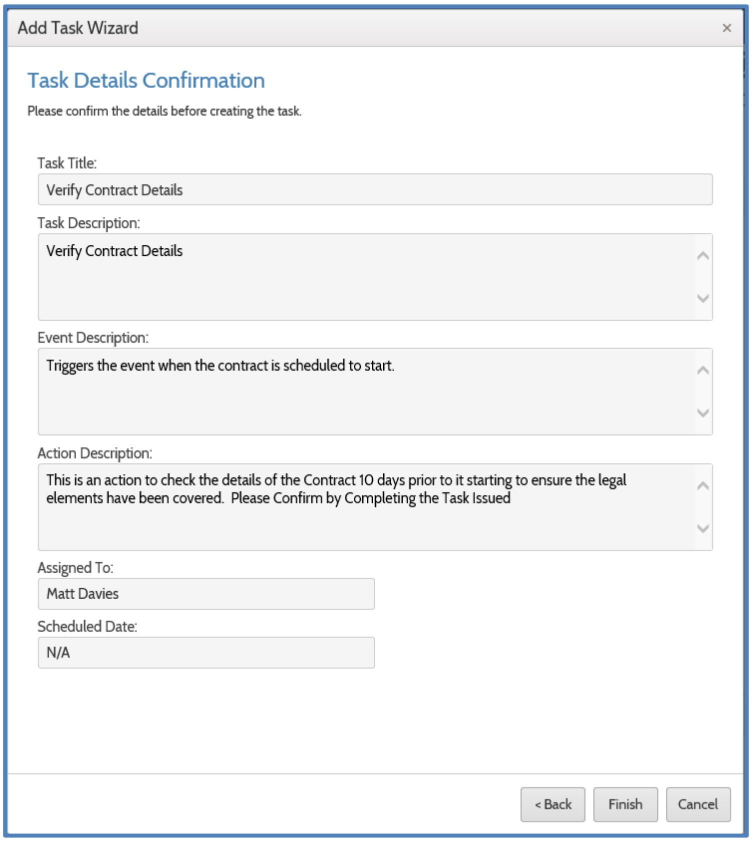
The Assignees functionality will allow for users/user groups to be added and when the Task is triggered the Users will be expected to perform the specific action detailed and confirm when the Action has been completed.

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

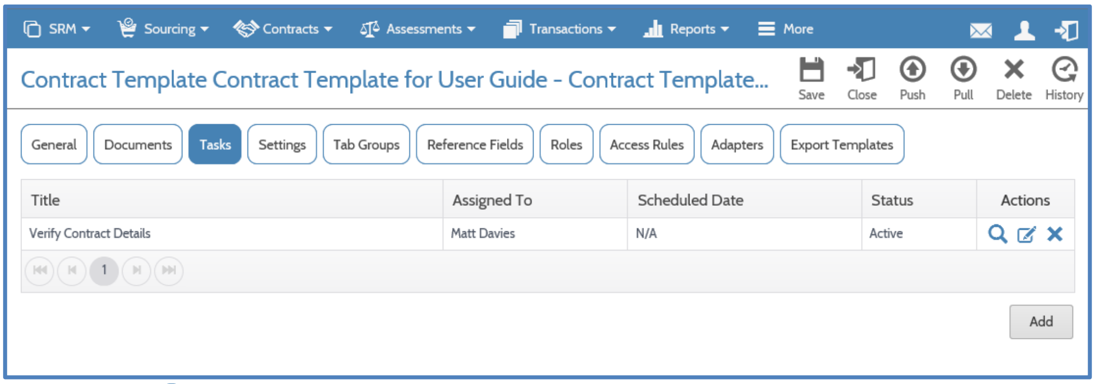
- Notification Type – can be set to:
    - Advance Notice (can determine Interval and Recurrence as below – these are used)
    - On Scheduled Date
    - Reminder (can determine Interval and Recurrence as below)
- Recipient – can set User/User group
- Interval (days) – this is how many days apart each 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.



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



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

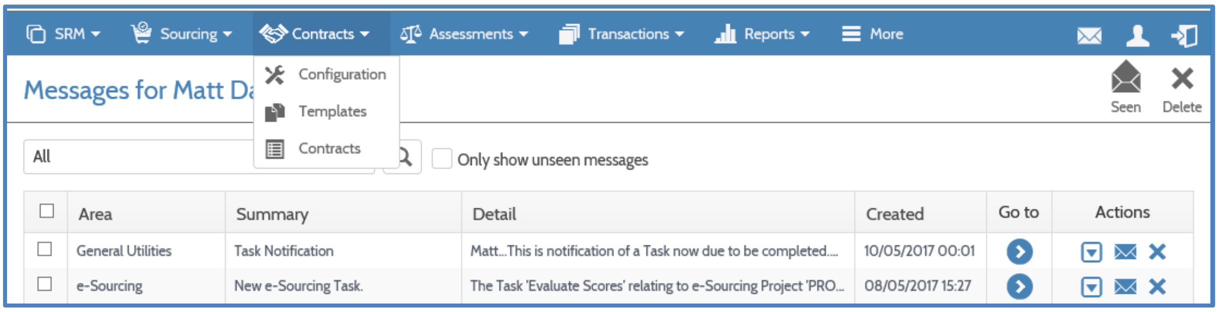
4.1.2 Reference Fields

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

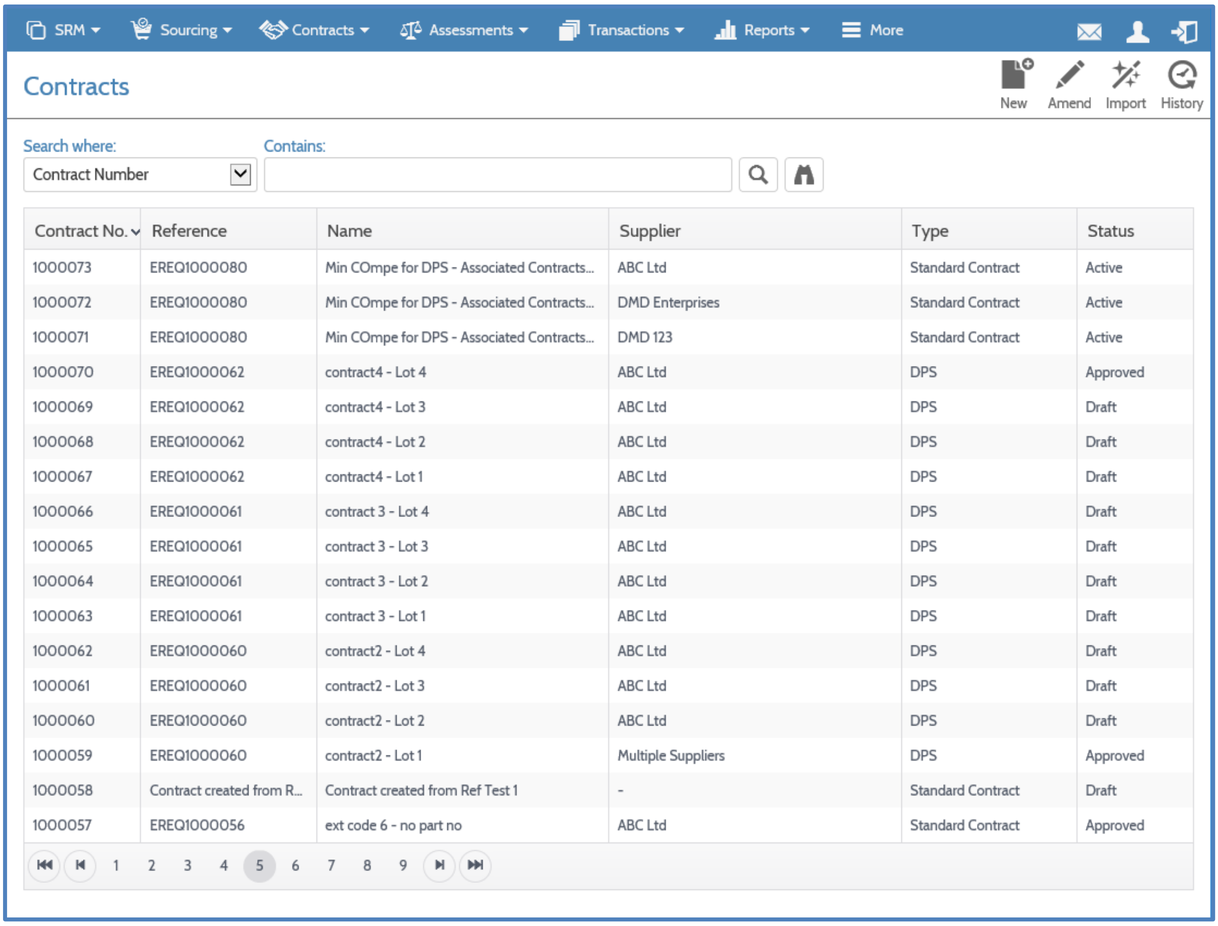
5 Maintaining Contracts

5.1 Accessing Contract Management

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



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



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

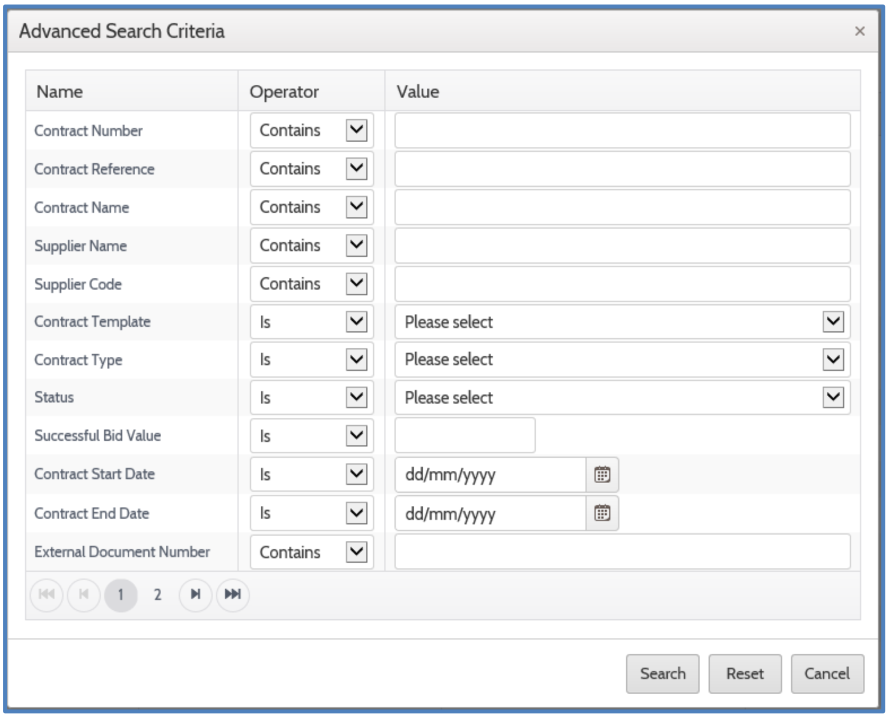
To search for a contract you can select the drop-down list under the “Search using: heading to reveal the following parameters:

- 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 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:

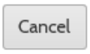
- Contains
- Does not Contain
- Begins With
- Equals
- Does not Equal

Once the search criterion has been entered, click 

to commence the search using the parameters entered above.

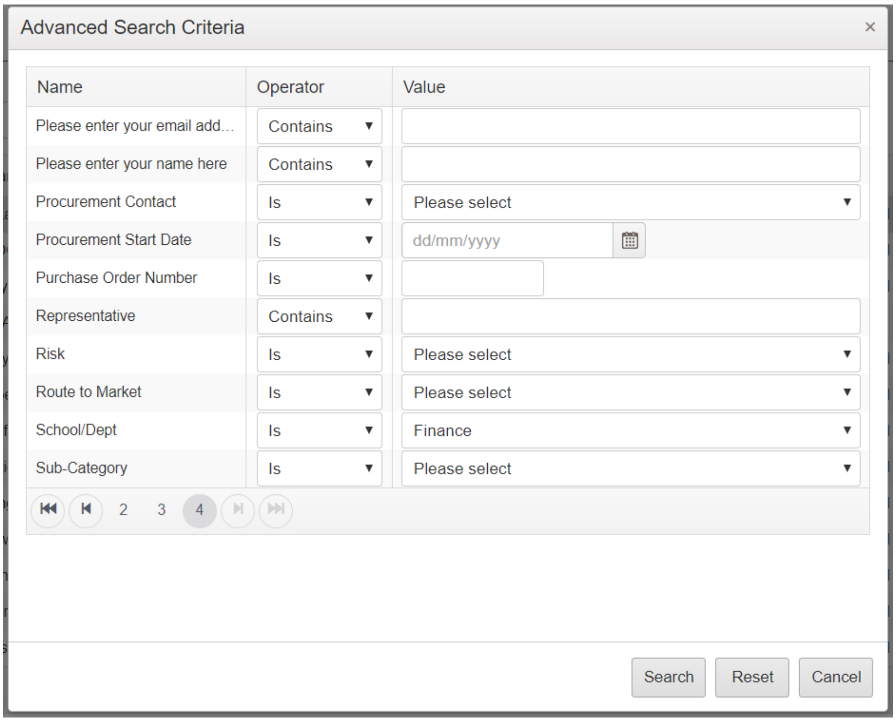
Click 

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:

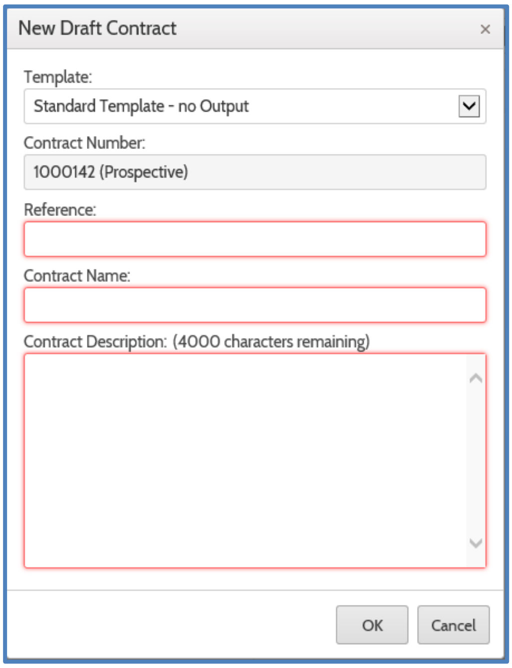


5.3 Creating a New Contract

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

To create a new contract, click on the 

Toolbar button. This will open the New Draft Contract pop-up dialog:

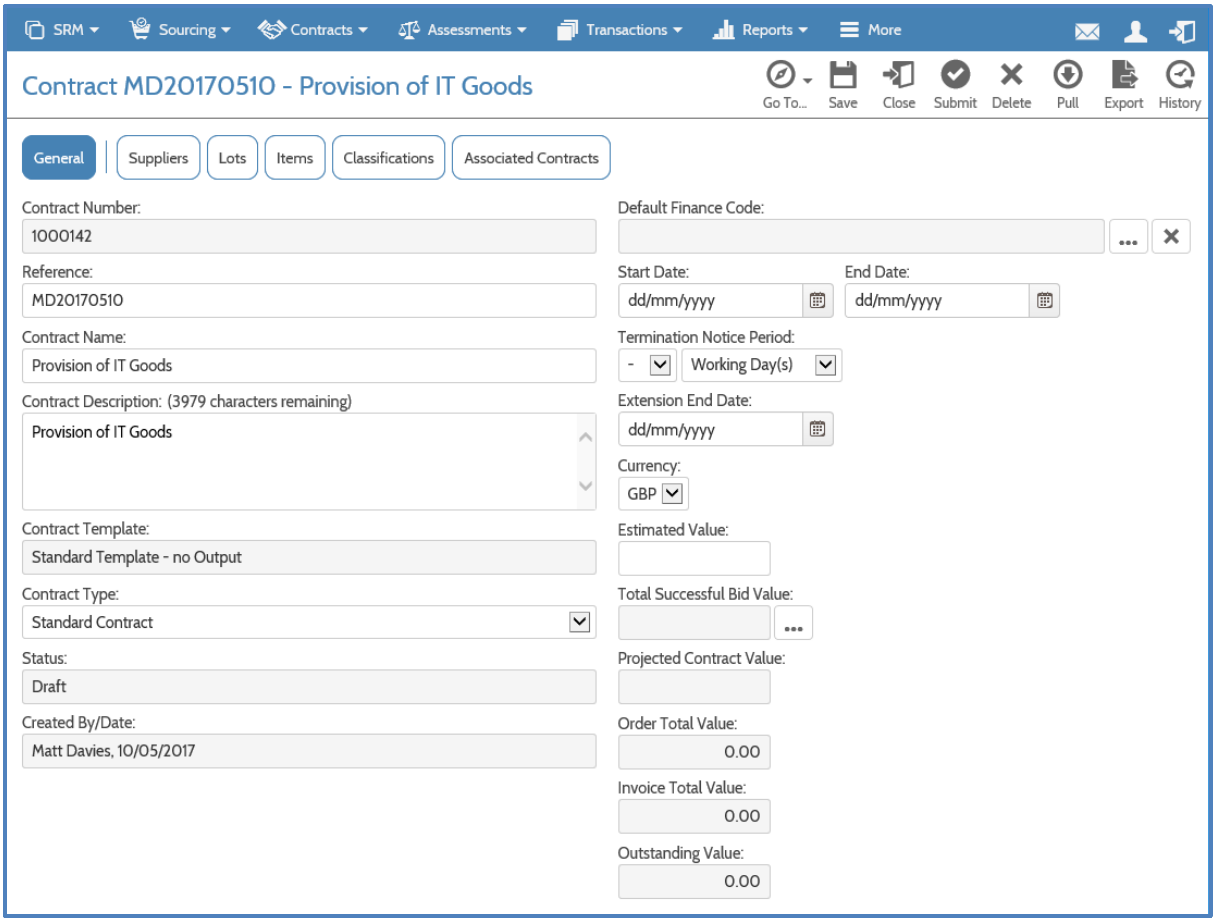


Select the relevant **Template** from the drop-down. The Template will contain the name of your school/division. You must use the template of the school/division that owns the contract. If you cannot see the template, contact the Finance Service Desk.

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

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

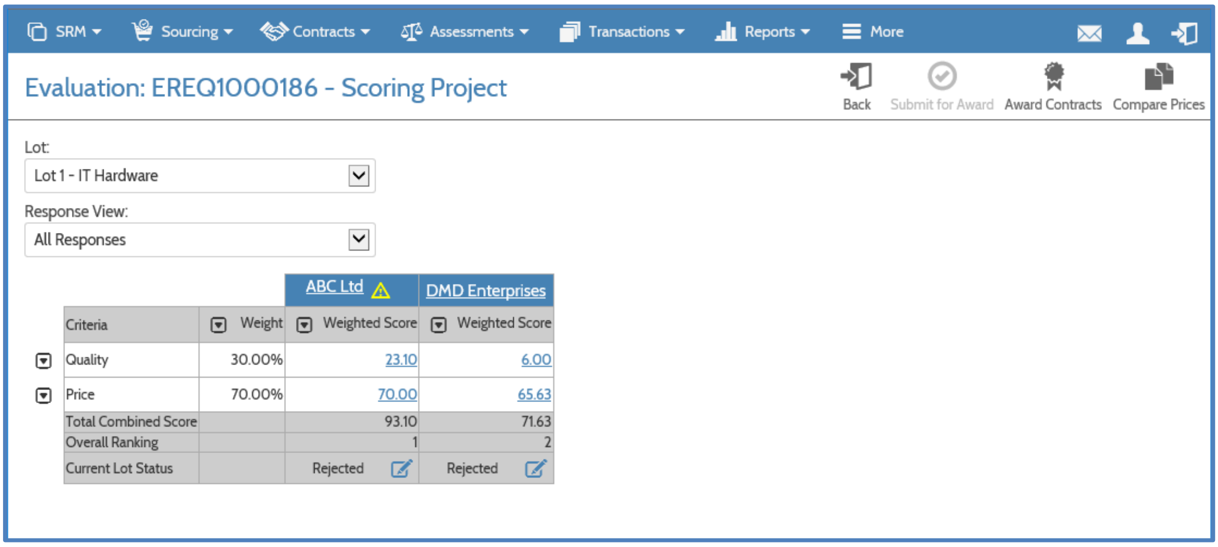
The newly created contract will be displayed with the reference, name and description entered as per the entries made into the previous window. The tabs displayed are based upon the tab structure maintained earlier in this document against the Contract Template:



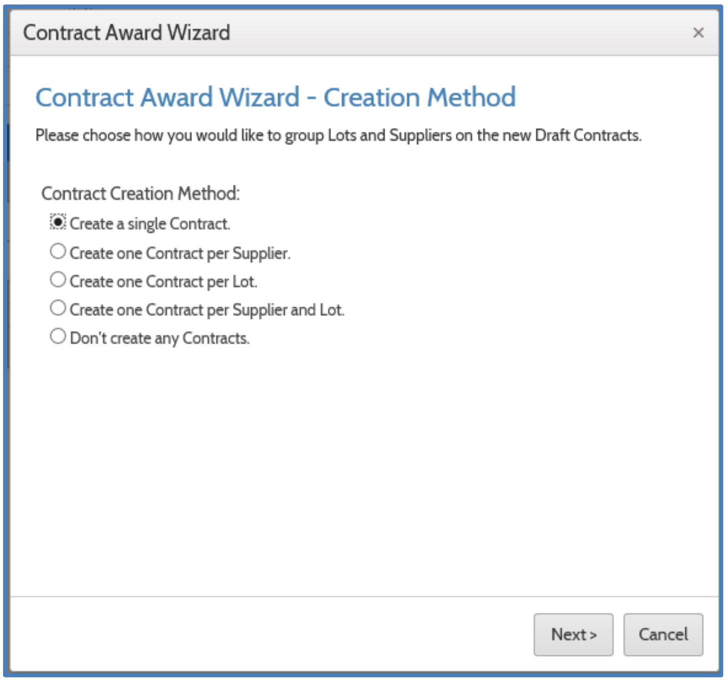
IMPORTANT: Save the changes by clicking **Save** on the Toolbar. This will finalise the Contract Number and allow the Contract data to be populated. Clicking **Close** will lose the changes and not create the contract, therefore please remember this step.

5.4 Creating a Contract (via Sourcing)

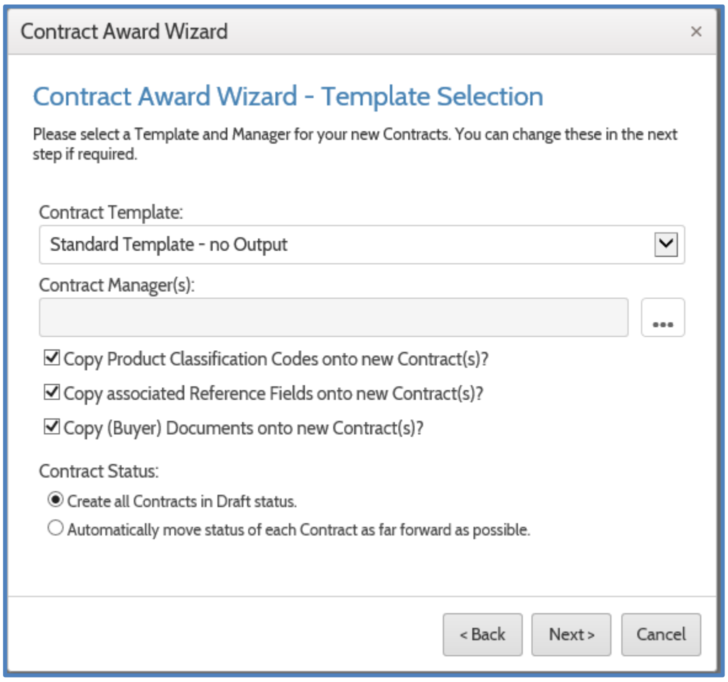
If a Sourcing Project has been run in the The Contract Management System, the final stage is to Award the Contract. This is performed from the Evaluation Page for the RFX Request Document. As below…



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



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



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).

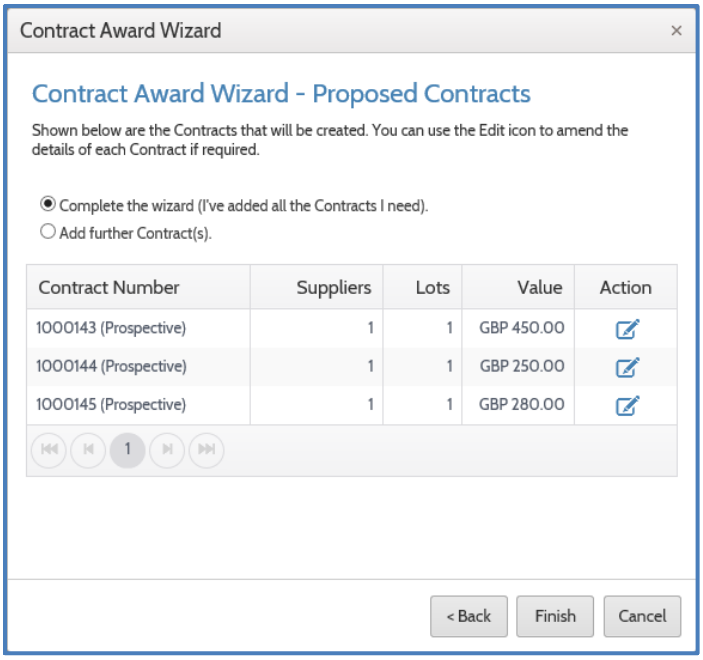
2) If the contract supports items (Allow Items = Yes), at least one "Supplier Item" must be added to the contract.

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).

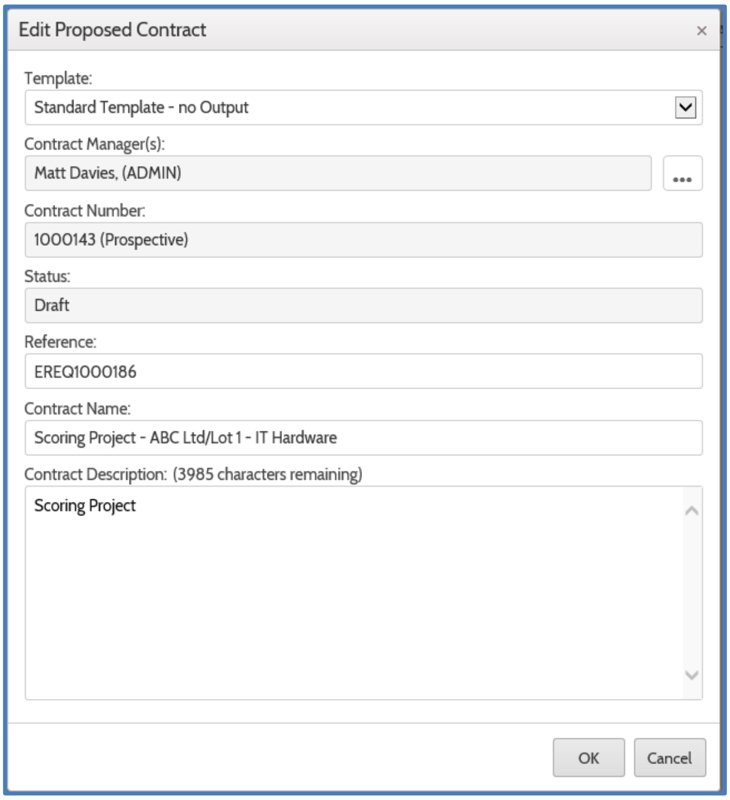
Another subtlety is when a contract can be automatically set as Completed. When completing manually, there are no requirements over and above being a member of the required role permission. When advancing the status automatically however, we can't assume that we should complete the contract just because 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**



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

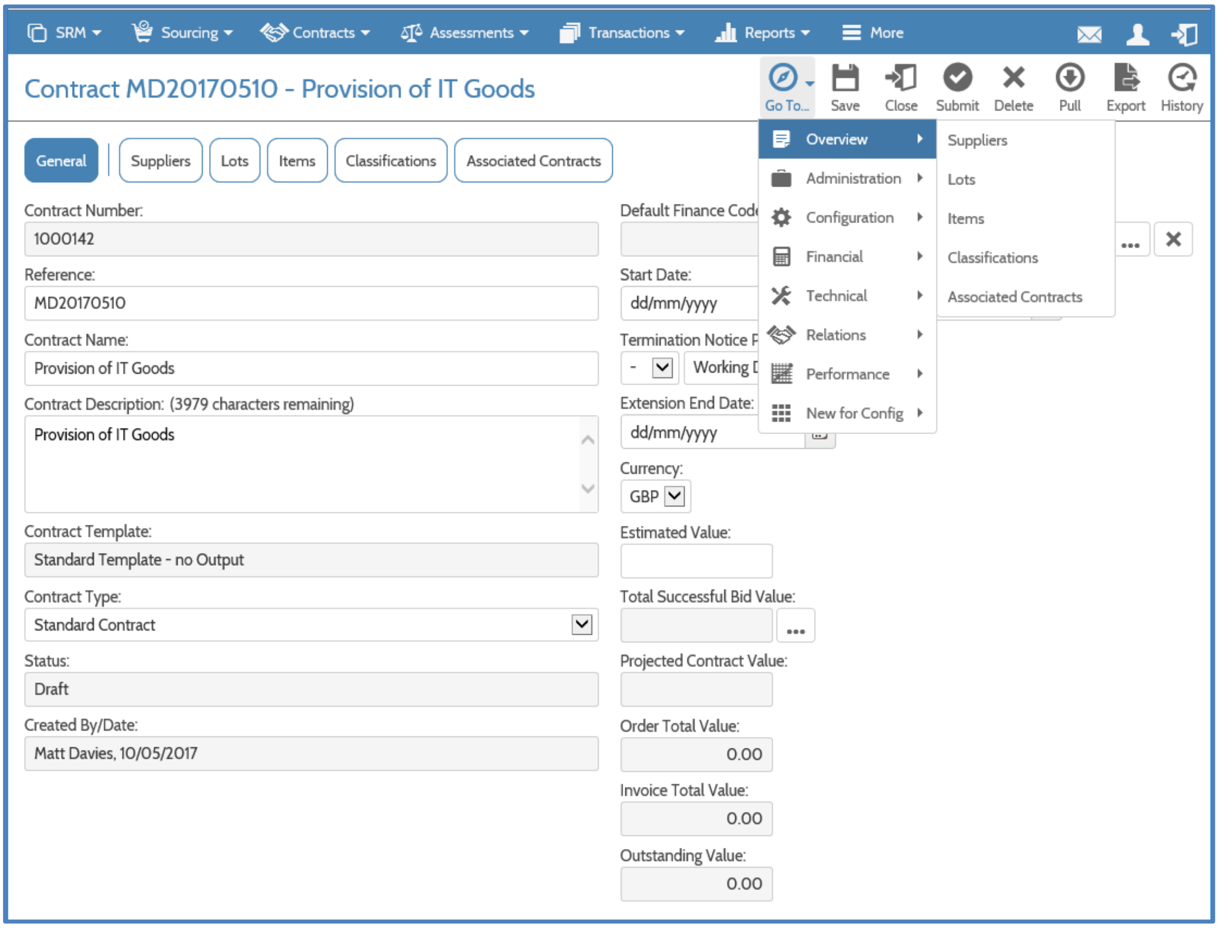


5.5 Navigating the Contract Record

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  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…



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 

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.

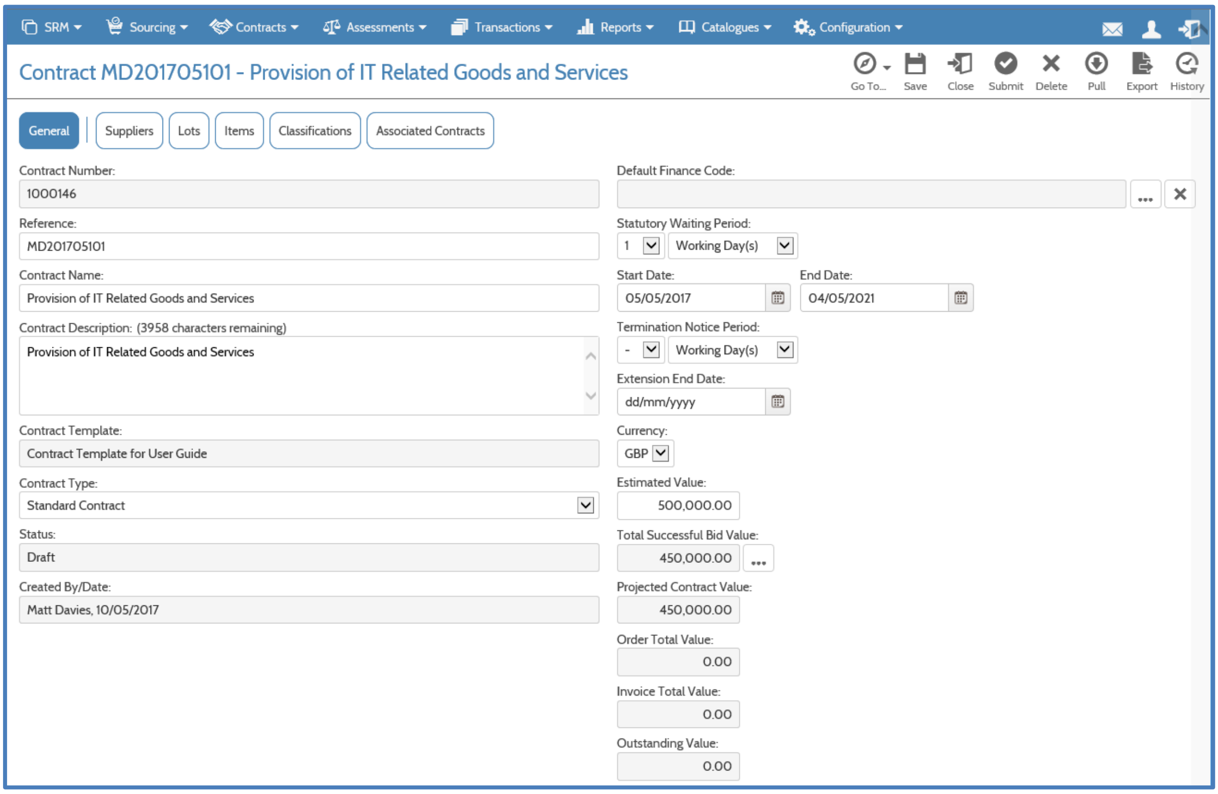
5.7 Contract Management – Saving Changes to Contracts

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.

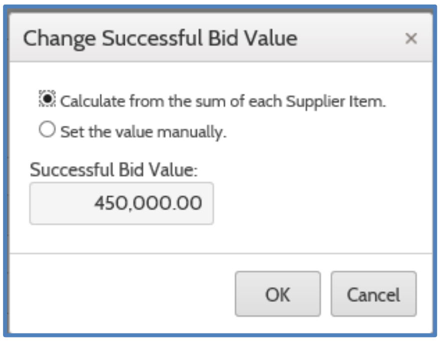
5.8.1 General Tab



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

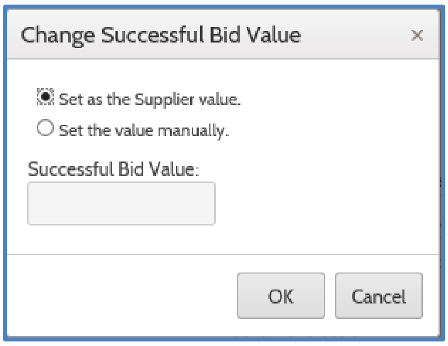
The Estimated Value can either be entered or will be taken from the Estimated Value of the Sourcing Project that created the Contract (taken from the e-sourcing module, if the contract was created via the tendering system).

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



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…



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.

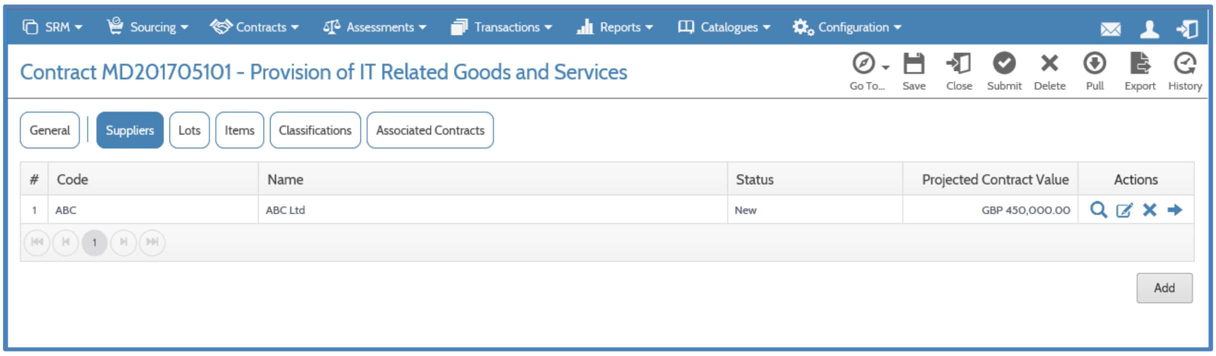
The Projected Contract Value will be the sum of the "Total Successful Bid Value" and any Variations that have been approved (non-approved variations will NOT affect this figure).

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.

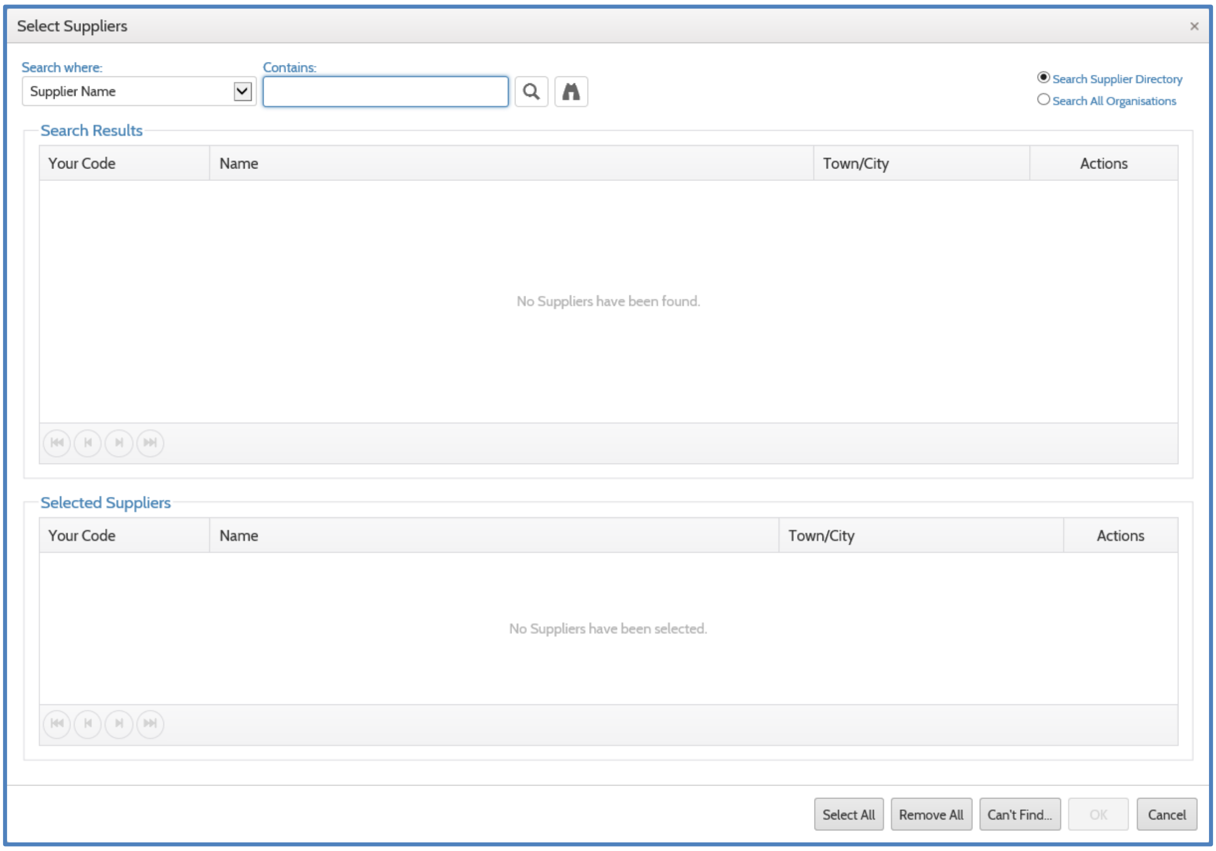
5.8.2 Suppliers Tab

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



The 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.

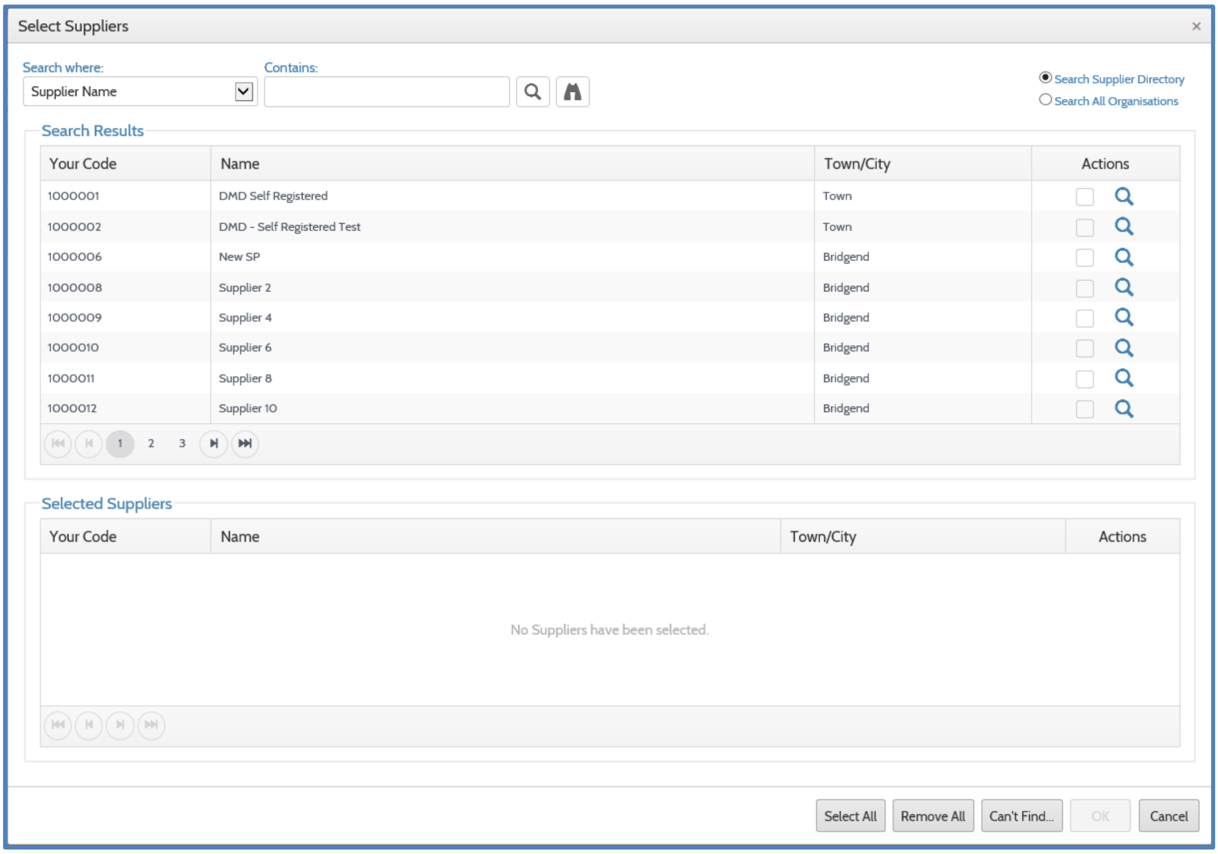
To add Suppliers, click on the **Add** button



The “Select Suppliers” 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.

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

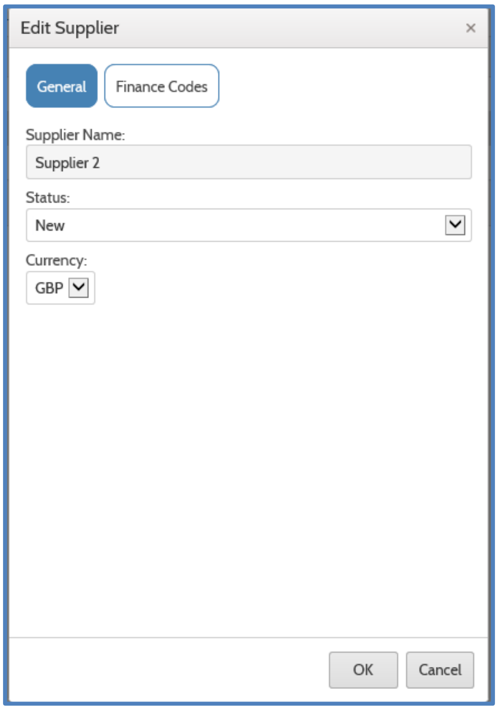
Once a Search has been run the results will display as below…



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.

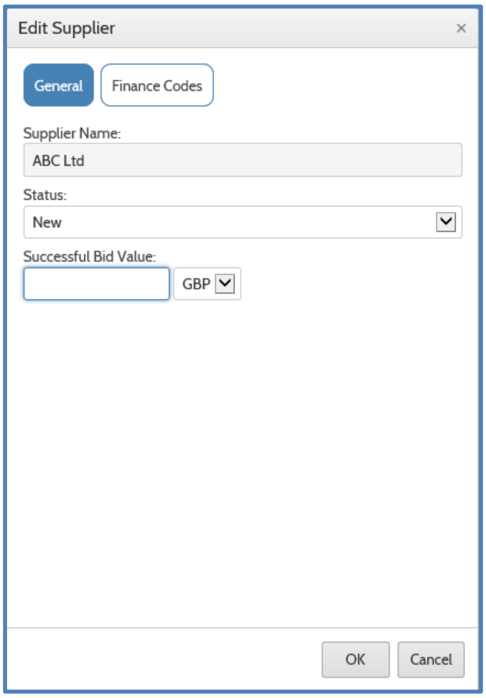
To Amend the Supplier's Status, click on the Action button for the relevant Supplier. The following pop-up dialog will be displayed…



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

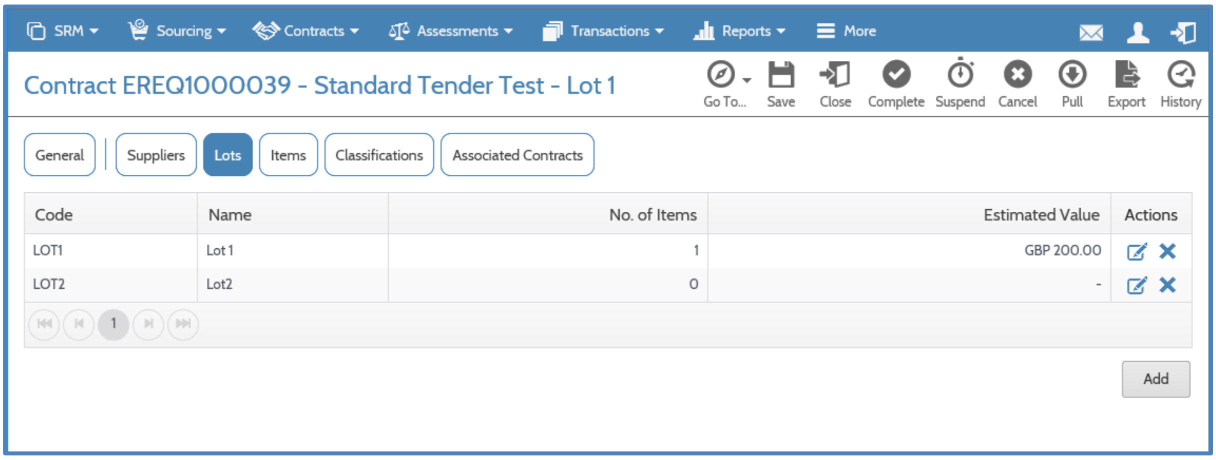
To remove a supplier from a Contract, click on the corresponding button

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…



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

5.8.3 Lots Tab



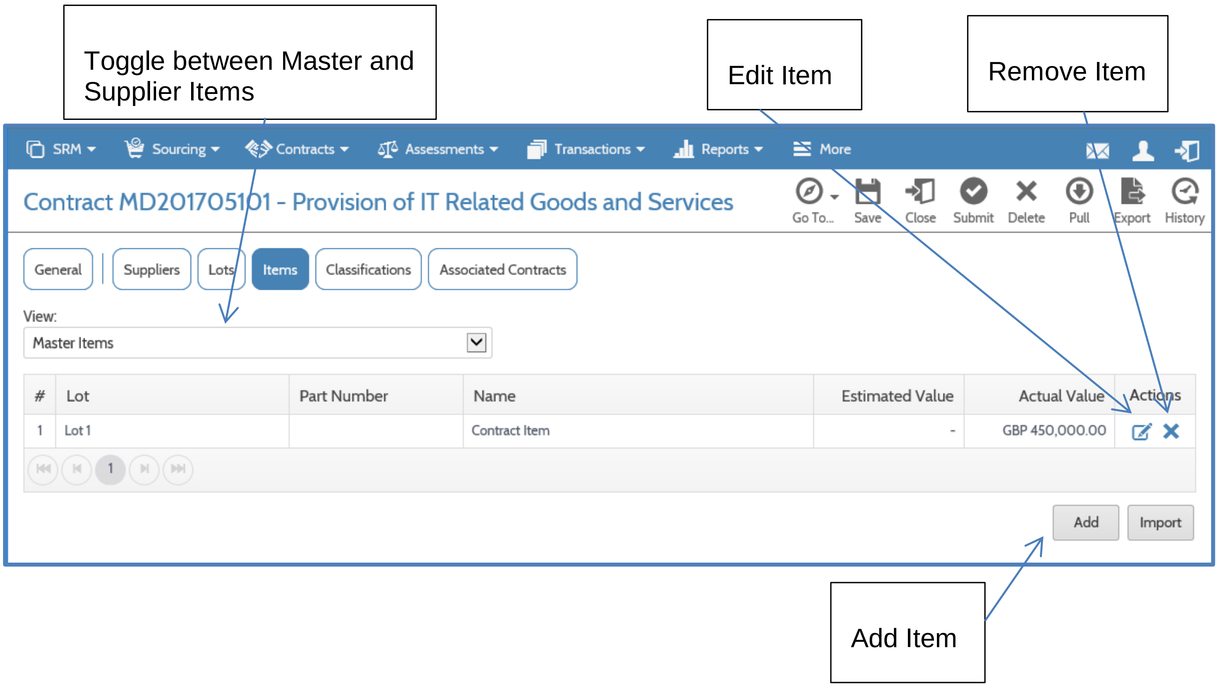
The existing/default Lot can be amended by clicking on the button.

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



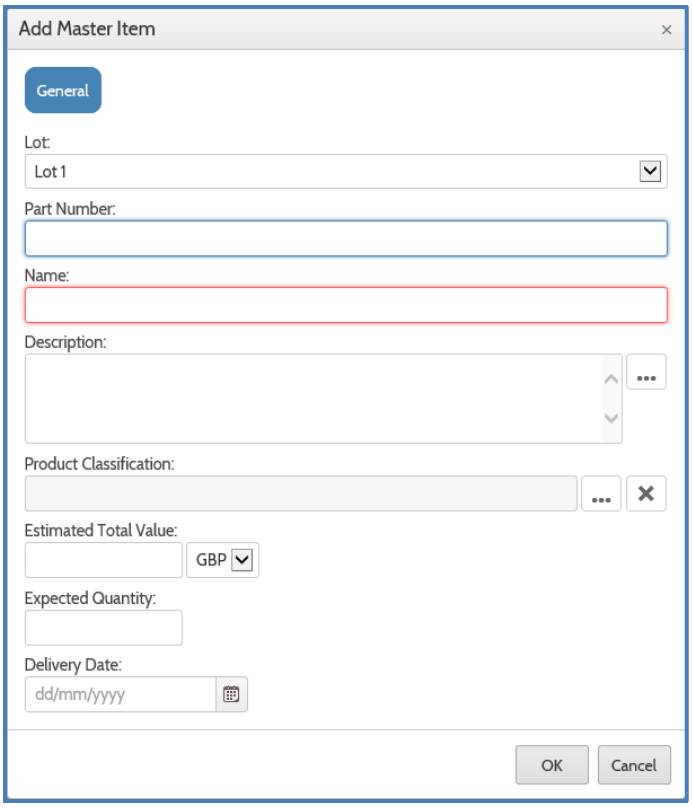
The Items Tab introduces the concept of Master Items and Supplier Items. Master items are those associated with the contract and in turn will link to a supplier associated to the contract. For example, if a Contract has 3 Master Items – A, B and C and 2 suppliers on the contract (Suppliers 1 and Supplier 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…



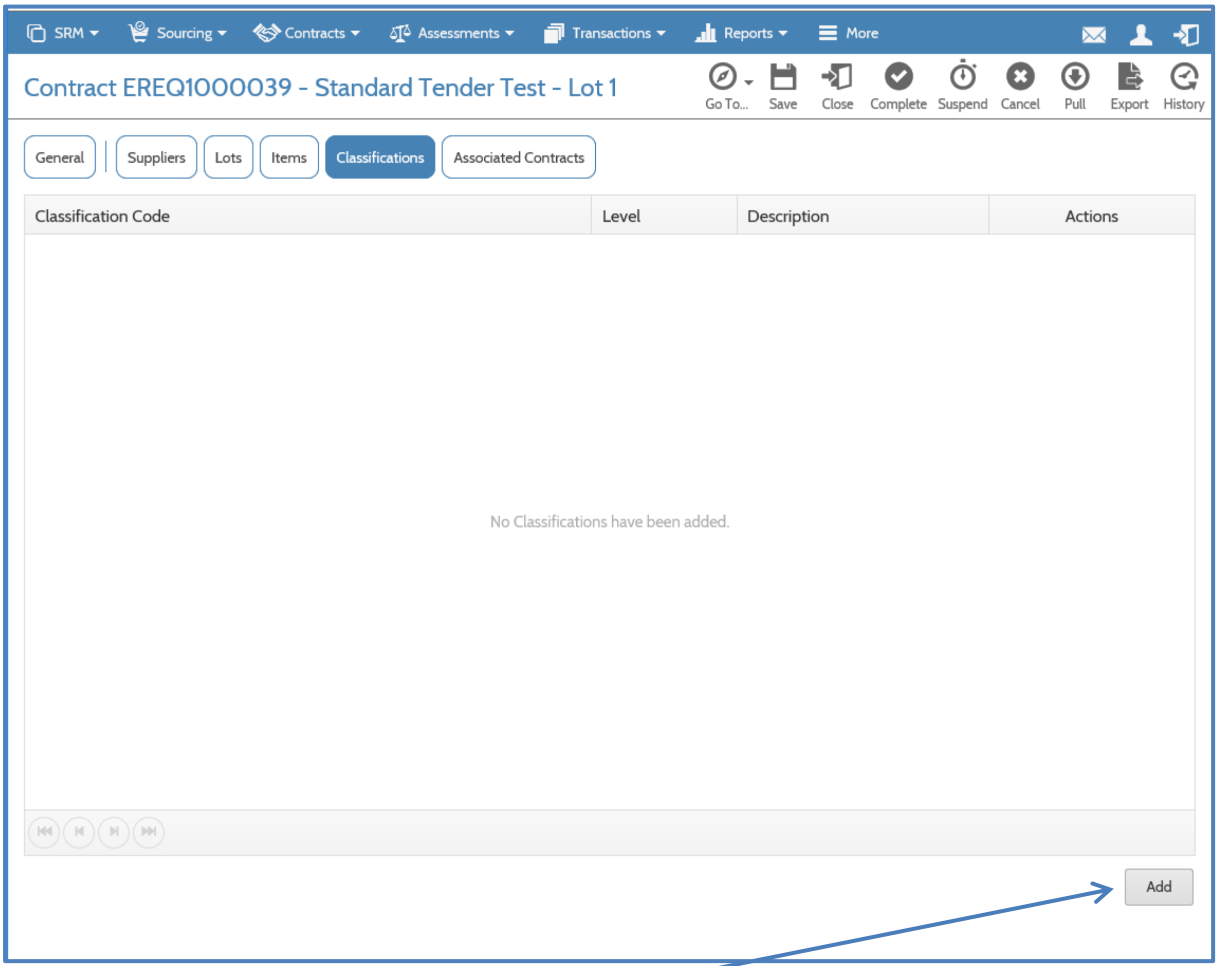
Note: The Product Classification, Total Expected Value, Expected Quantity, Maximum Order Value and Delivery Date fields above are configurable Contract Settings and as such may not appear, may be optional or may be mandatory.

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

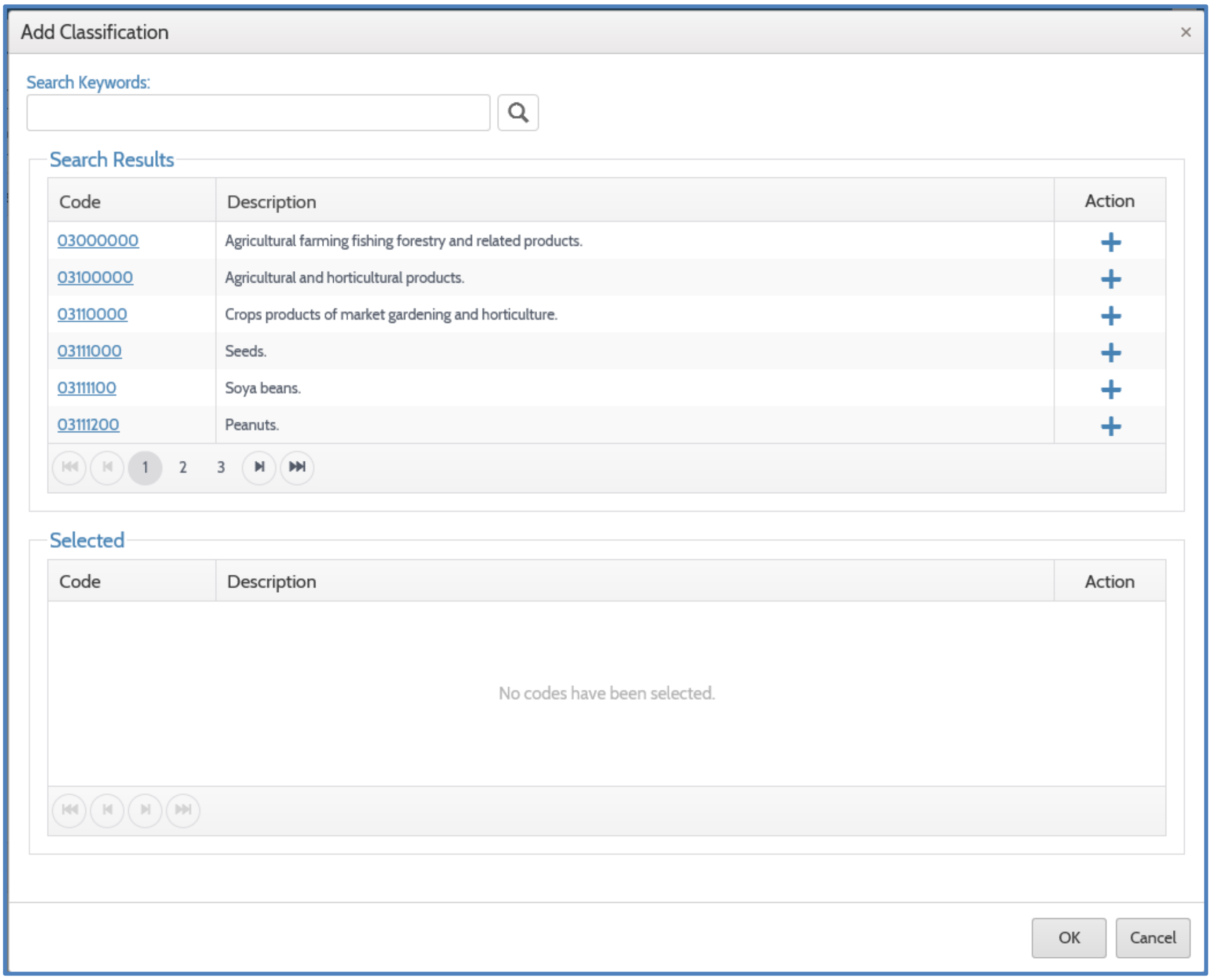
Each Item must be associated with an appropriate Lot

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.

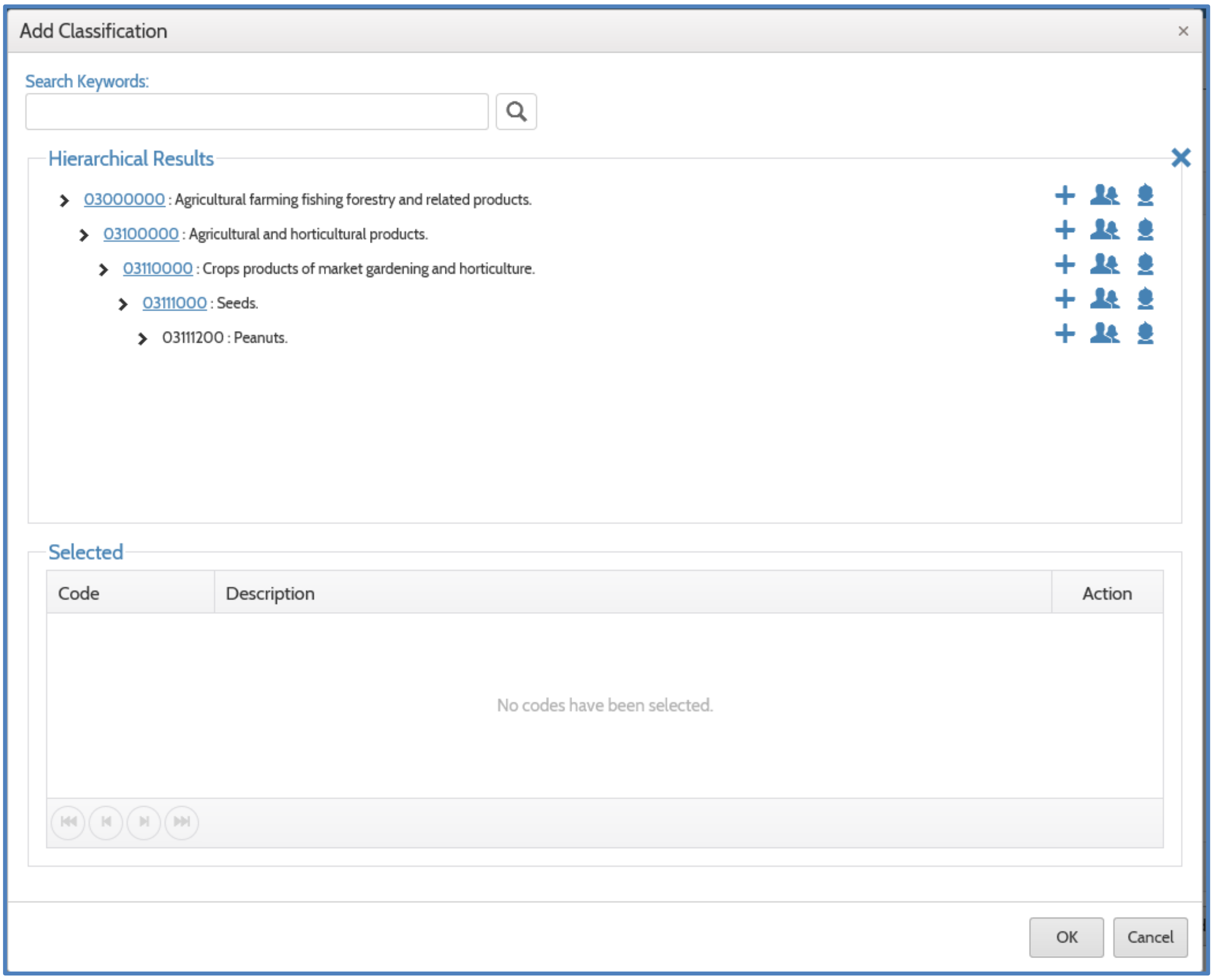
5.8.5 Classifications Tab



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…



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…

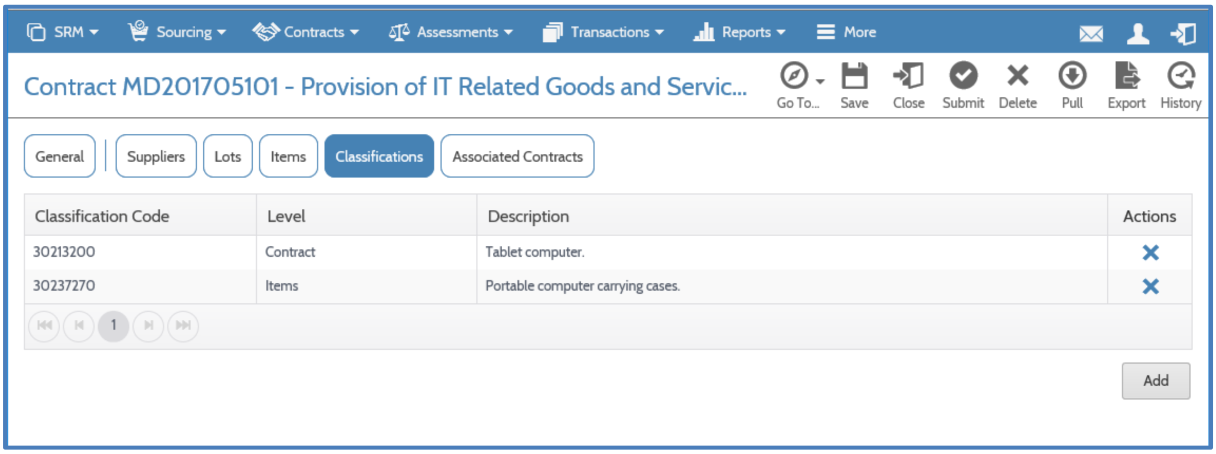


Clicking will add the relevant Classification and its Parent Codes in the hierarchy to the "Selected" pane. Clicking will add the relevant Classification plus any Child Classifications to the "Selected" pane

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.

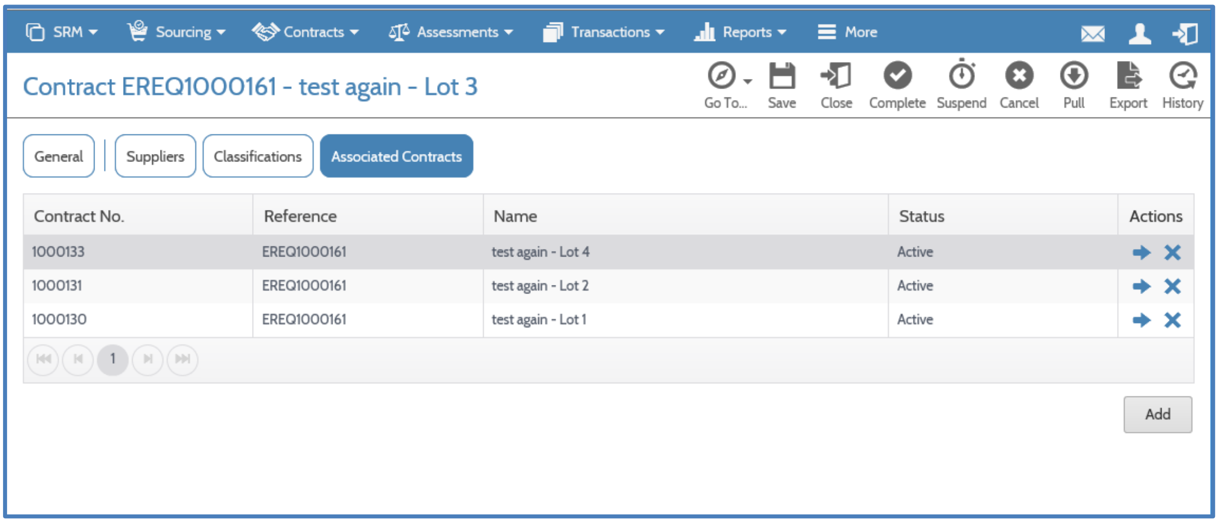
Once a Classification has been added the tab will display as follows….



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.

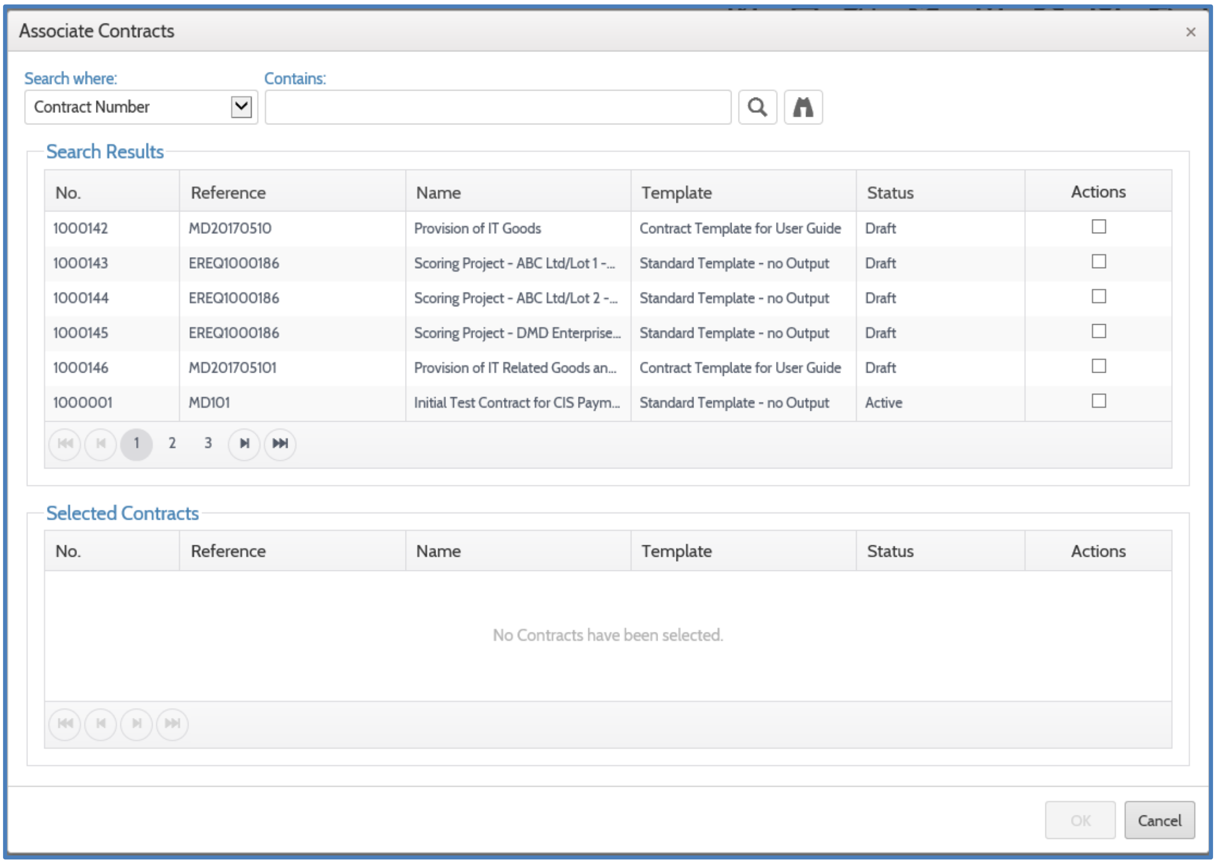
5.8.6 Associated Contracts Tab



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



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

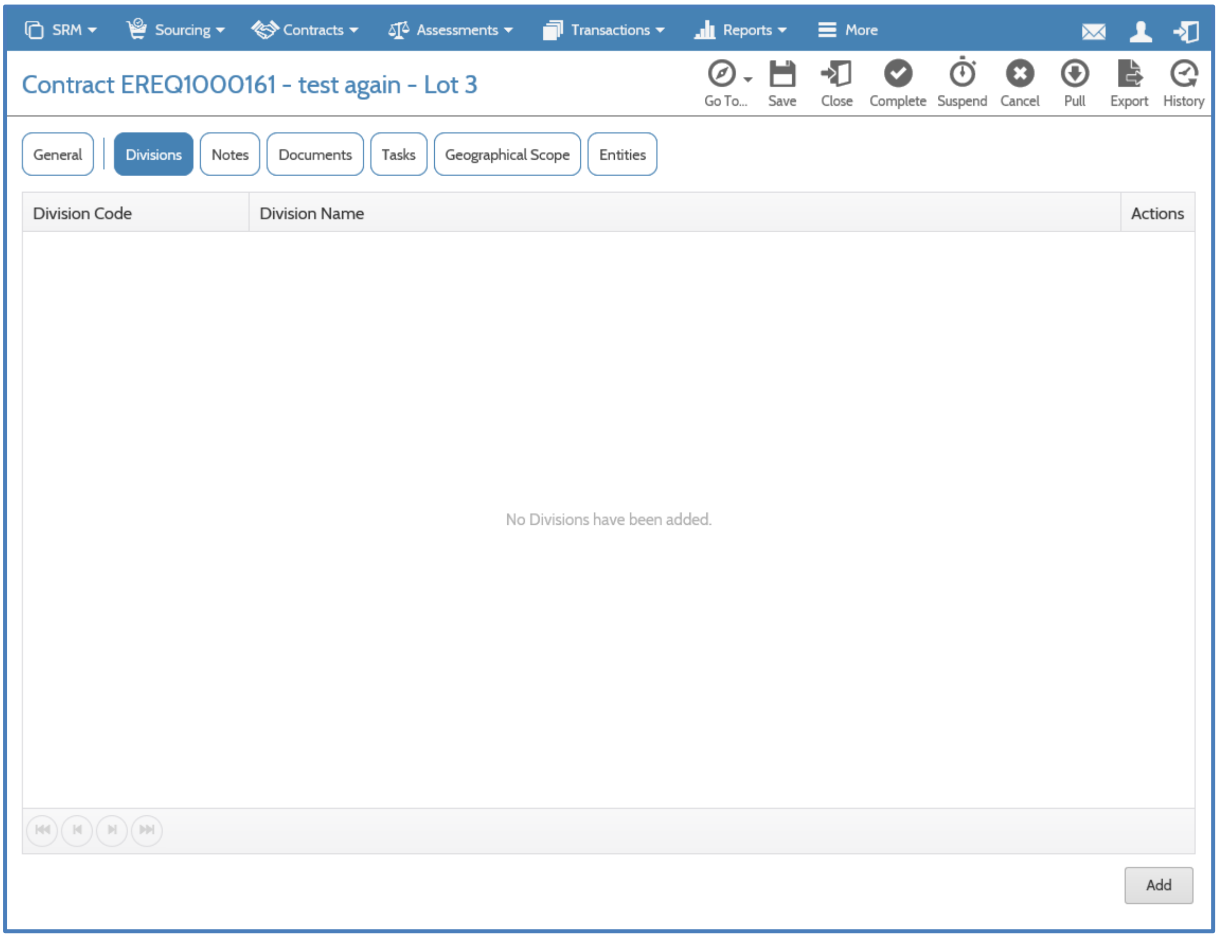
Once the Contract is linked a corresponding link record will be created in the linked contract. Therefore if Contract A is associated with Contract B it follows that Contract B is associated with Contract A.

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

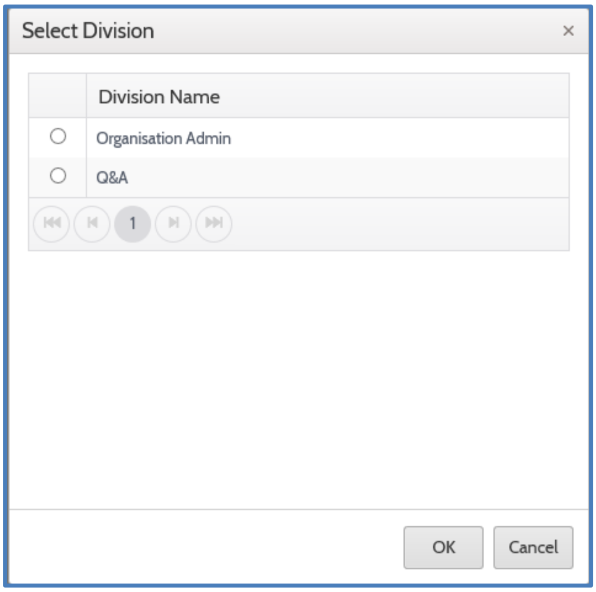
Click on the icon to remove the association

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

5.8.7 Divisions Tab



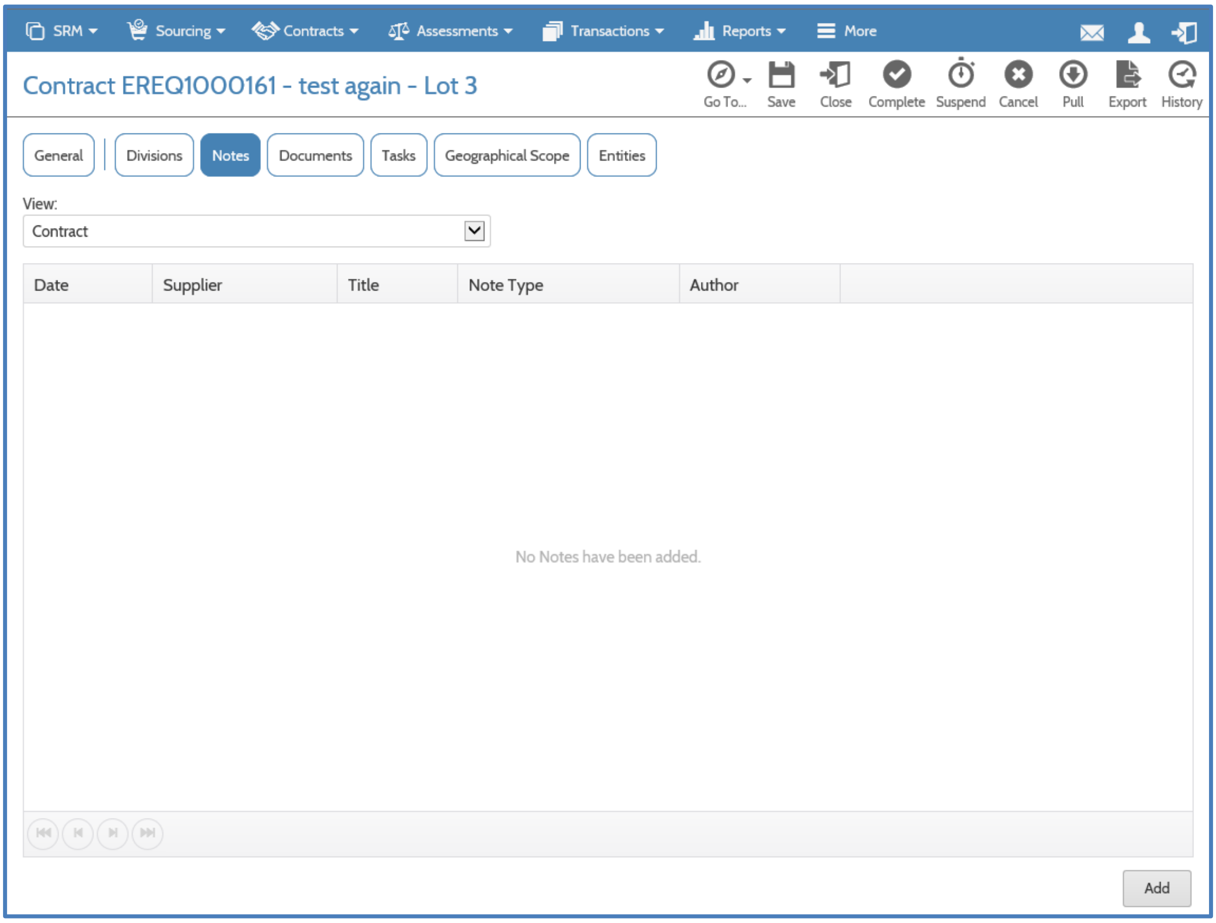
To associate Divisions with the Contract, click on **Add**…



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.

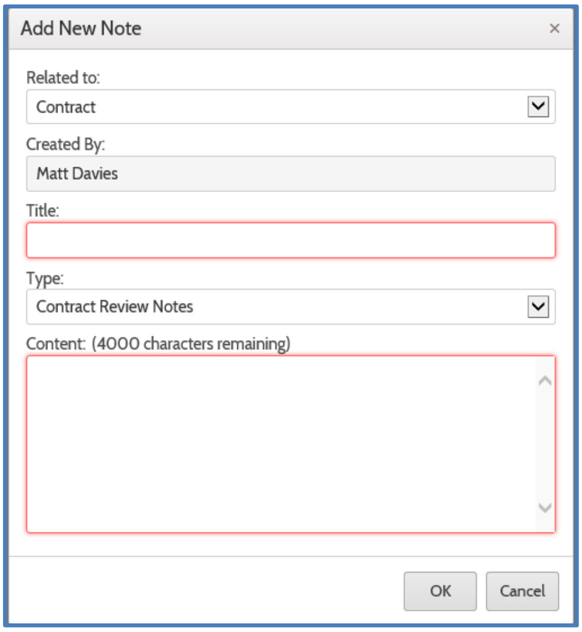
5.8.8 Notes Tab



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.

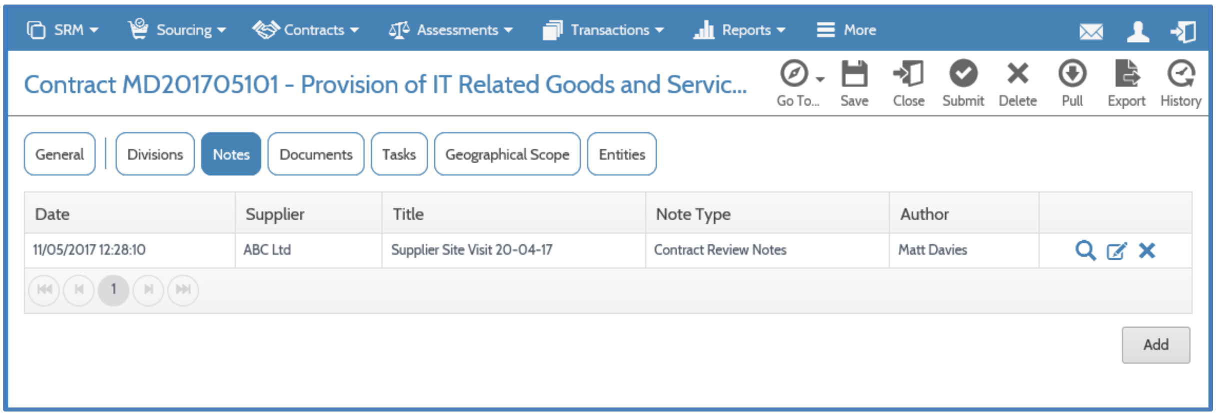
To add a note, click the **Add** button…



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**

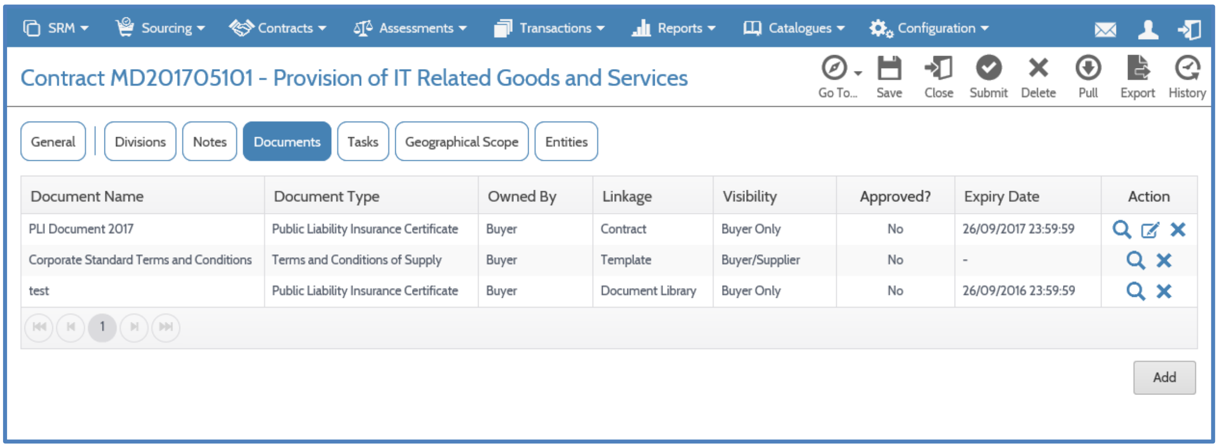
Click **OK**



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

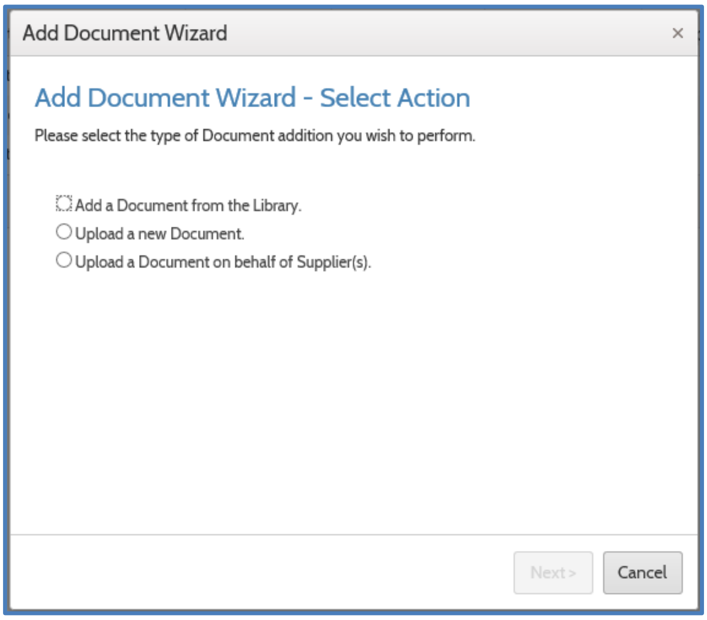
Remember to click **Save** on the Toolbar.

5.8.9 Documents Tab



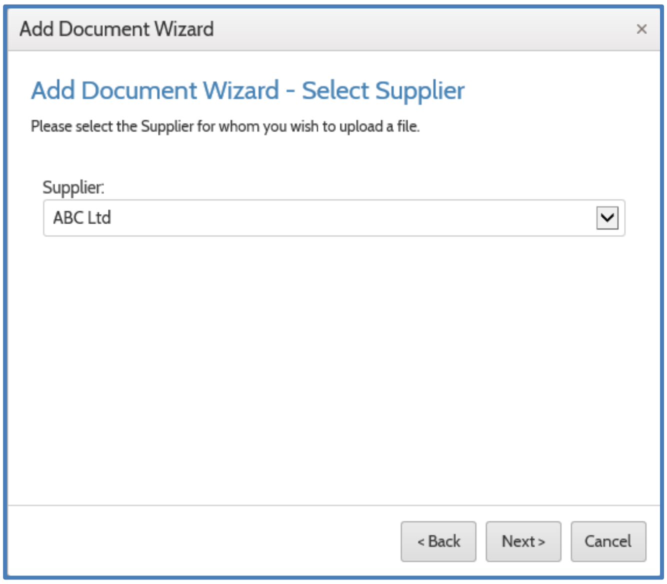
Documents can be added from a pc/server and can be added on behalf of the buying organisation or a supplier.

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

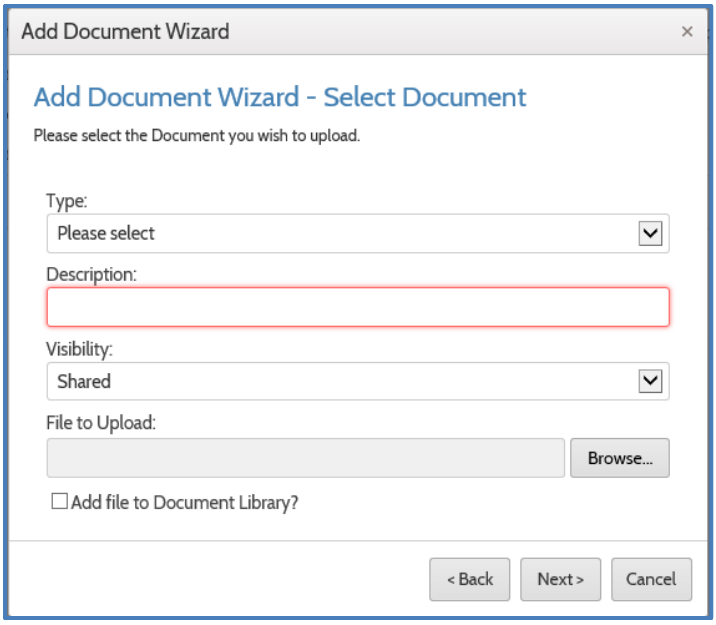


Select the relevant method and click **Next**

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…

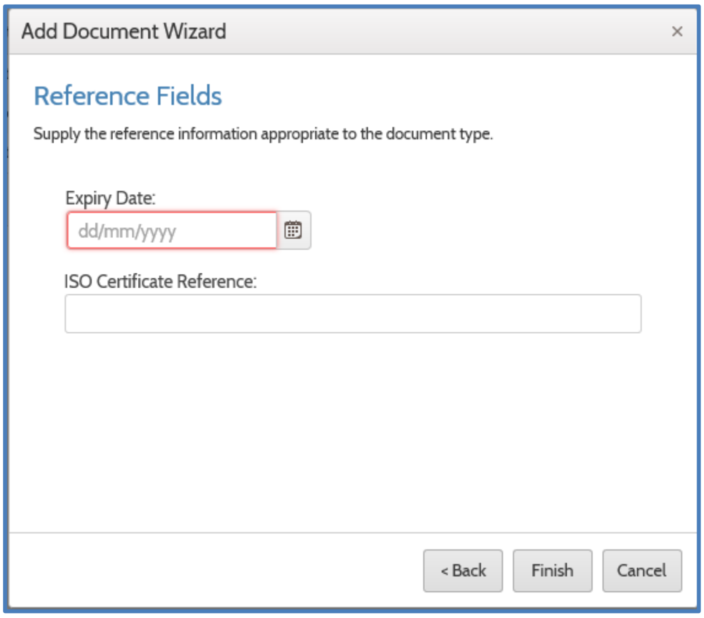


Select the **Type** and insert a **Description** for the document.

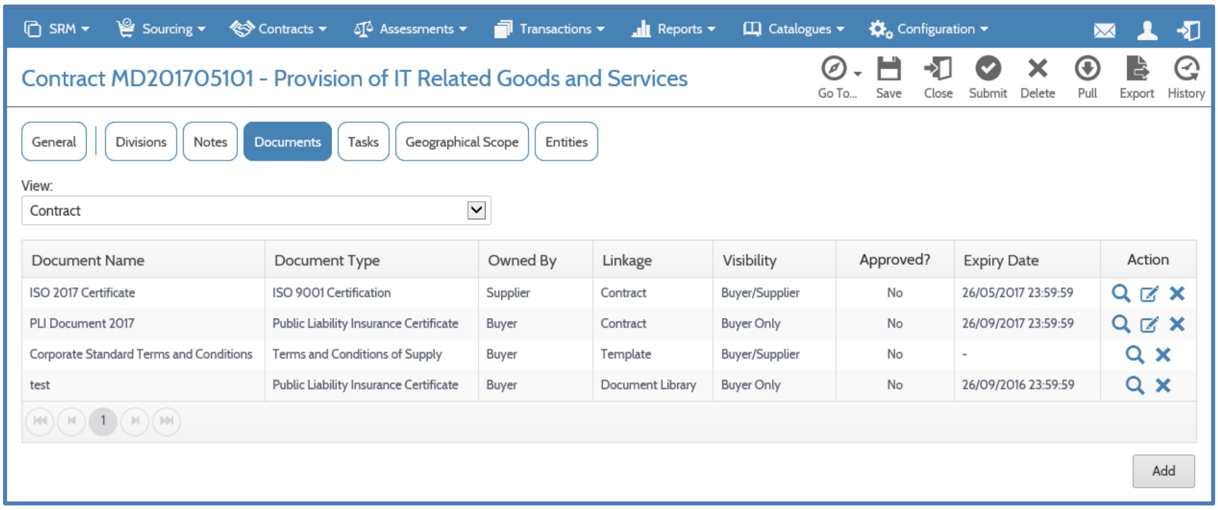
Select whether the document should be Shared or Private. If a Document is uploaded by a Buyer User and is set to Shared, the document is Shared with all Suppliers on the Contract (if this setting is set to allow sharing in the template. Unless requested, this setting is not set to allow sharing). If 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'.

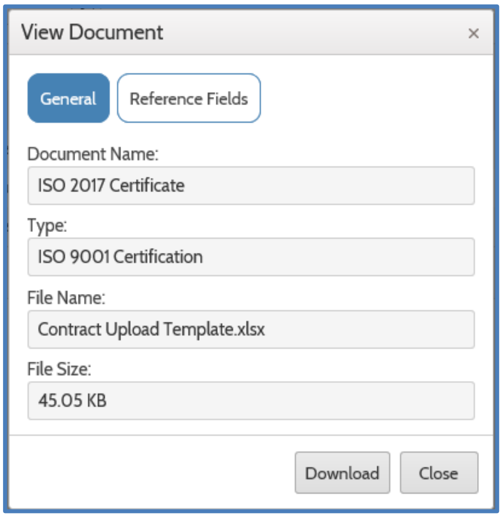
Either a **Next** or a **Finish** button will be displayed on completing the information. The reason being that the Document Type may have Expiry Dates and/or Reference Fields to be completed. If so the Page will display as follows…



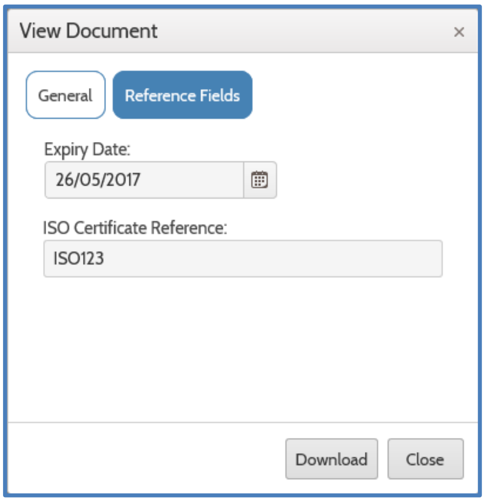
Where the Contract is a multiple Supplier Contract, the Documents Tab will display a View Filter to see documents uploaded as a “Contract” Document (that is, all documents uploaded for the Contract being viewed), “All Suppliers” (the documents that will be visible to all Suppliers on a Contract), Named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



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



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…



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.

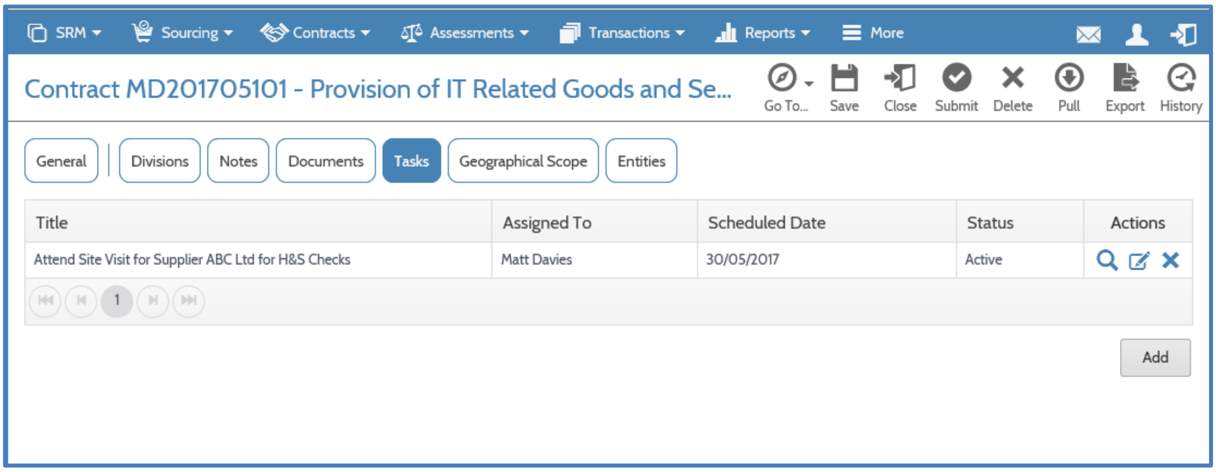
- The Document Name can be changed and the visibility on the **General Tab**.
- Click on the **Browse** button and select the file to replace the existing one
- The **Reference Fields** Tab will display where the Document Type has Expiry Enabled and/or Reference Fields defined…

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

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

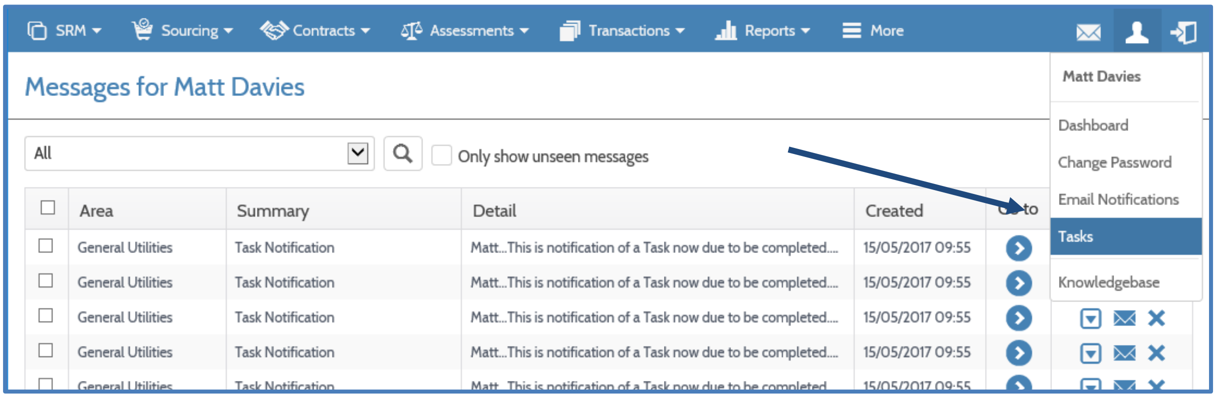
Remember to click **Save** on the Toolbar after any/all documents have been added/removed/edited.

5.8.10 Tasks Tab

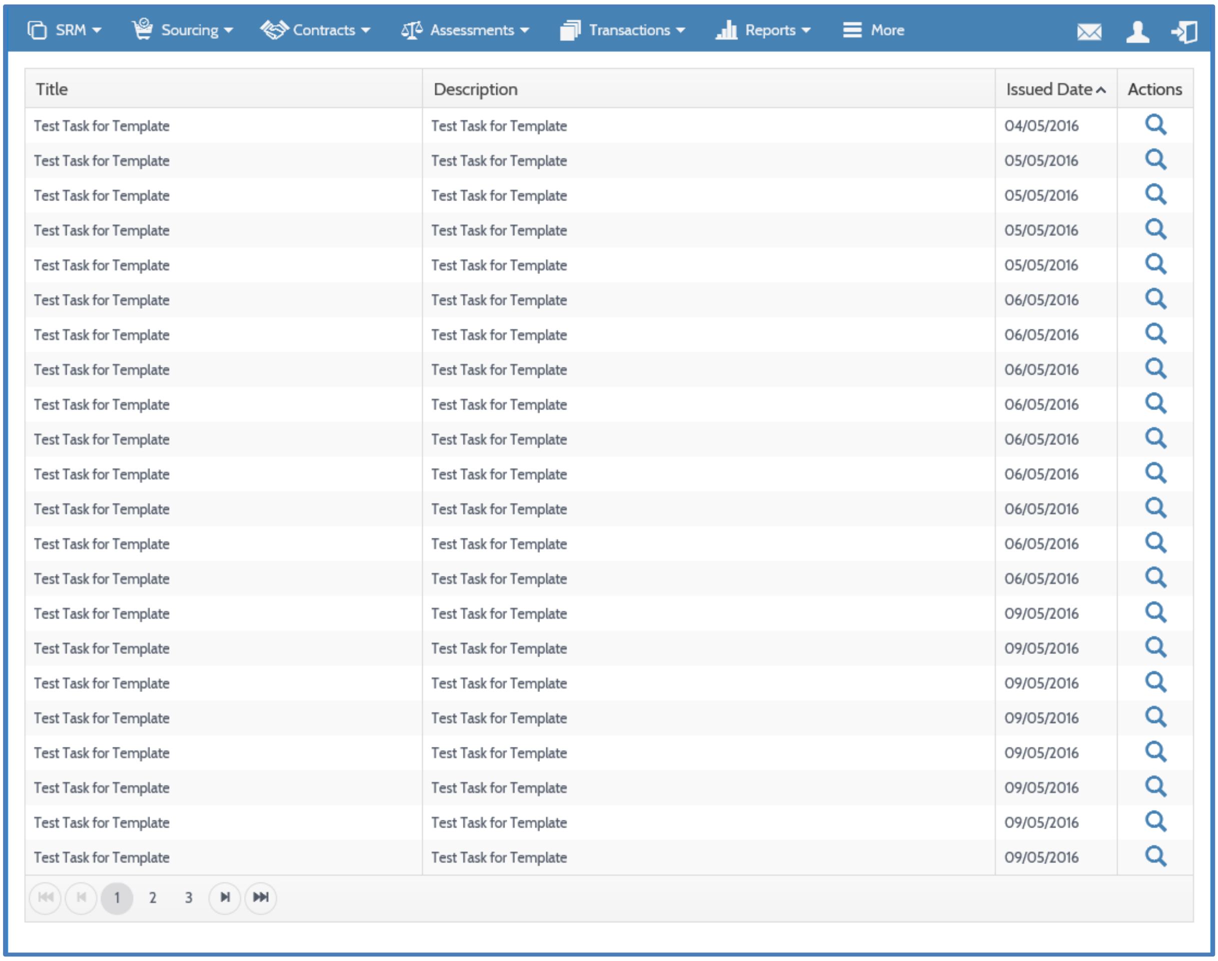


Contracts themselves provide 2 further "Event Types" – "Now" and "Date Reference Field". The former option will be triggered immediately whilst the latter provides the ability to select a Reference Field that has been configured as a "Date" Field that will then be used to trigger the Task. Whatever Date 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…



The Tasks Page displays as…



Title	Description	Issued Date	Actions
Test Task for Template	Test Task for Template	04/05/2016	
Test Task for Template	Test Task for Template	05/05/2016	
Test Task for Template	Test Task for Template	05/05/2016	
Test Task for Template	Test Task for Template	05/05/2016	
Test Task for Template	Test Task for Template	05/05/2016	
Test Task for Template	Test Task for Template	06/05/2016	
Test Task for Template	Test Task for Template	06/05/2016	
Test Task for Template	Test Task for Template	06/05/2016	
Test Task for Template	Test Task for Template	06/05/2016	
Test Task for Template	Test Task for Template	06/05/2016	
Test Task for Template	Test Task for Template	06/05/2016	
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Test Task for Template	Test Task for Template	06/05/2016	
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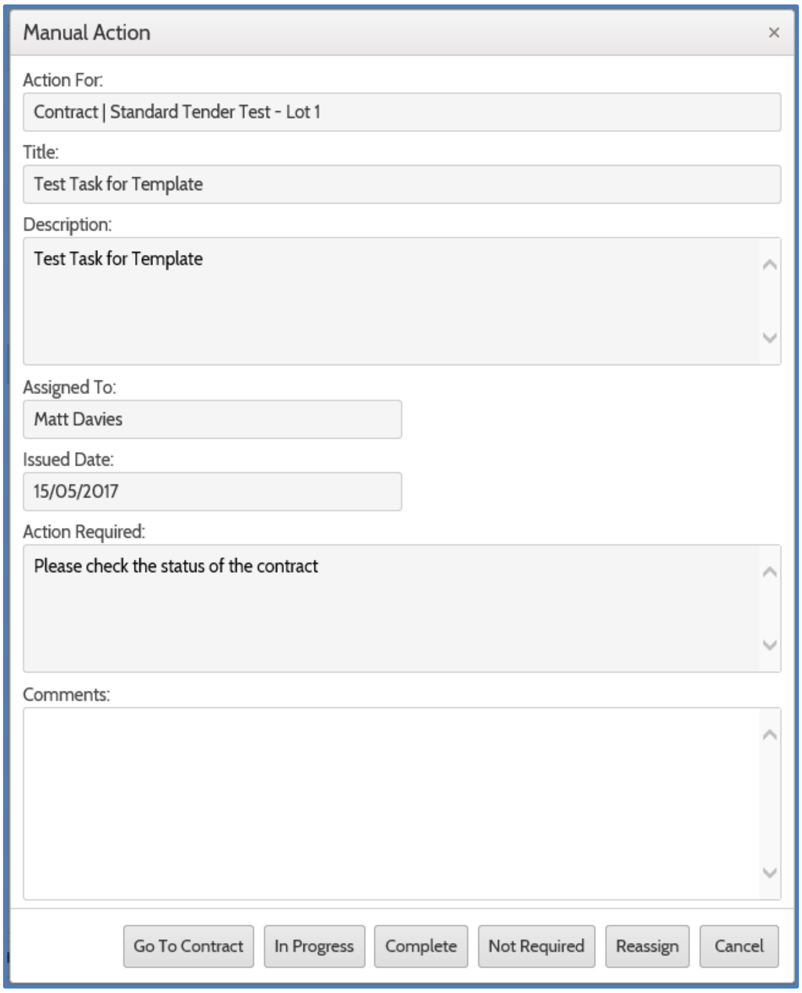
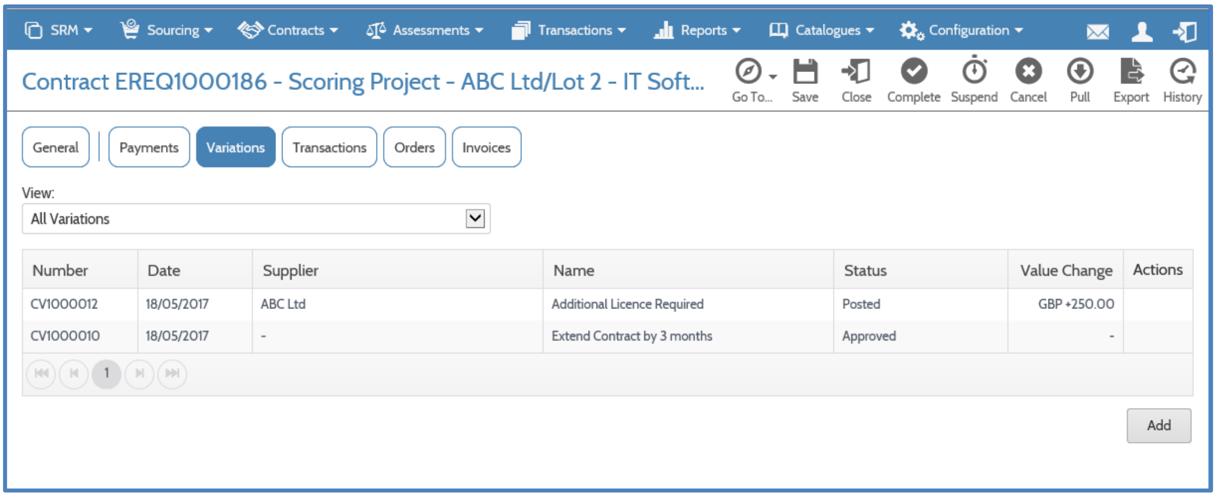
Test Task for Template	Test Task for Template	09/05/2016	
Test Task for Template	Test Task for Template	09/05/2016	
Test Task for Template	Test Task for Template	09/05/2016	
Test Task for Template	Test Task for Template	09/05/2016	
Test Task for Template	Test Task for Template	09/05/2016	
Test Task for Template	Test Task for Template	09/05/2016	
Test Task for Template	Test Task for Template	09/05/2016	
Test Task for Template	Test Task for Template	09/05/2016	

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



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



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.

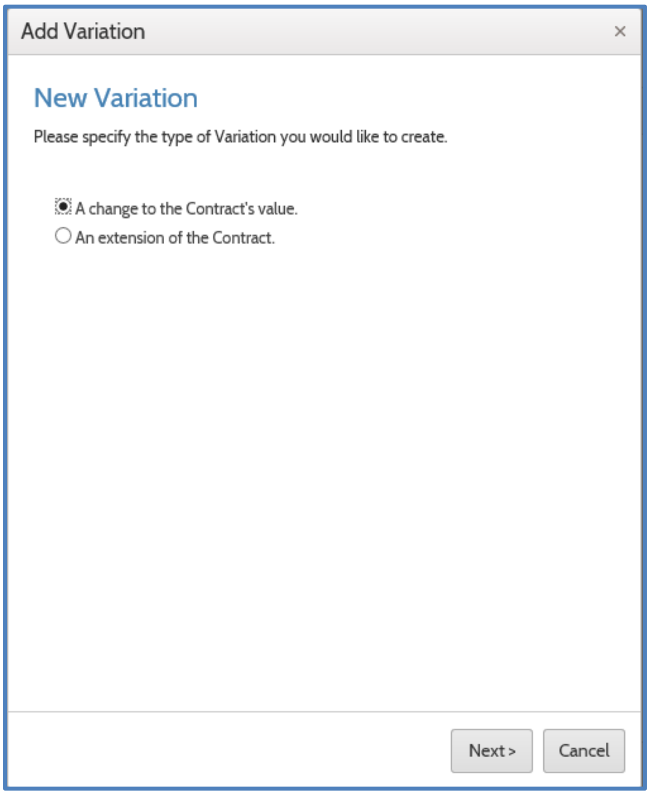
IMPORTANT: The Contract Settings must be set to “Allow Variations” to use any functionality on this Tab. Further, the User must have the appropriate permission(s) in their Contract Role on the Contract being administered.

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.

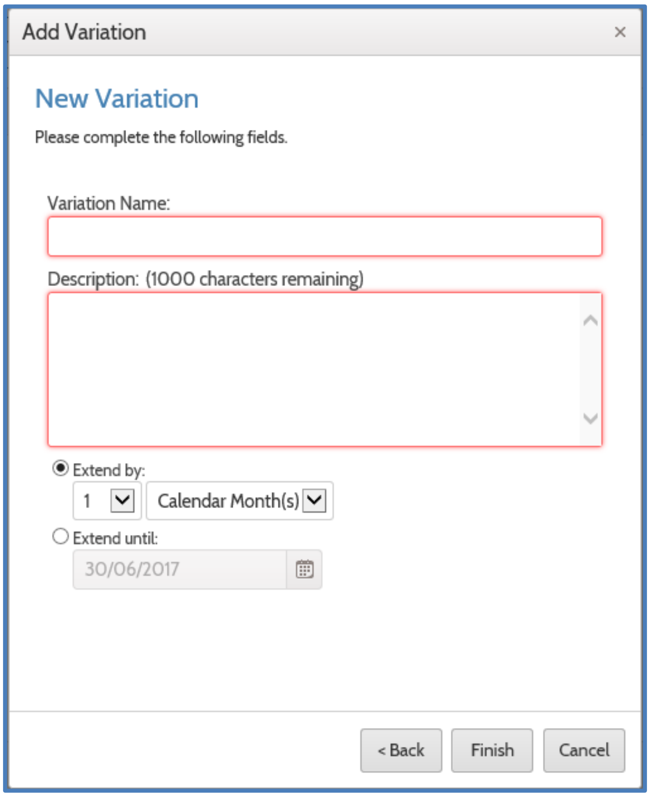
In addition, for Variations to be used for Contract Extensions the Contract must have a Contract Start and End Date.

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…

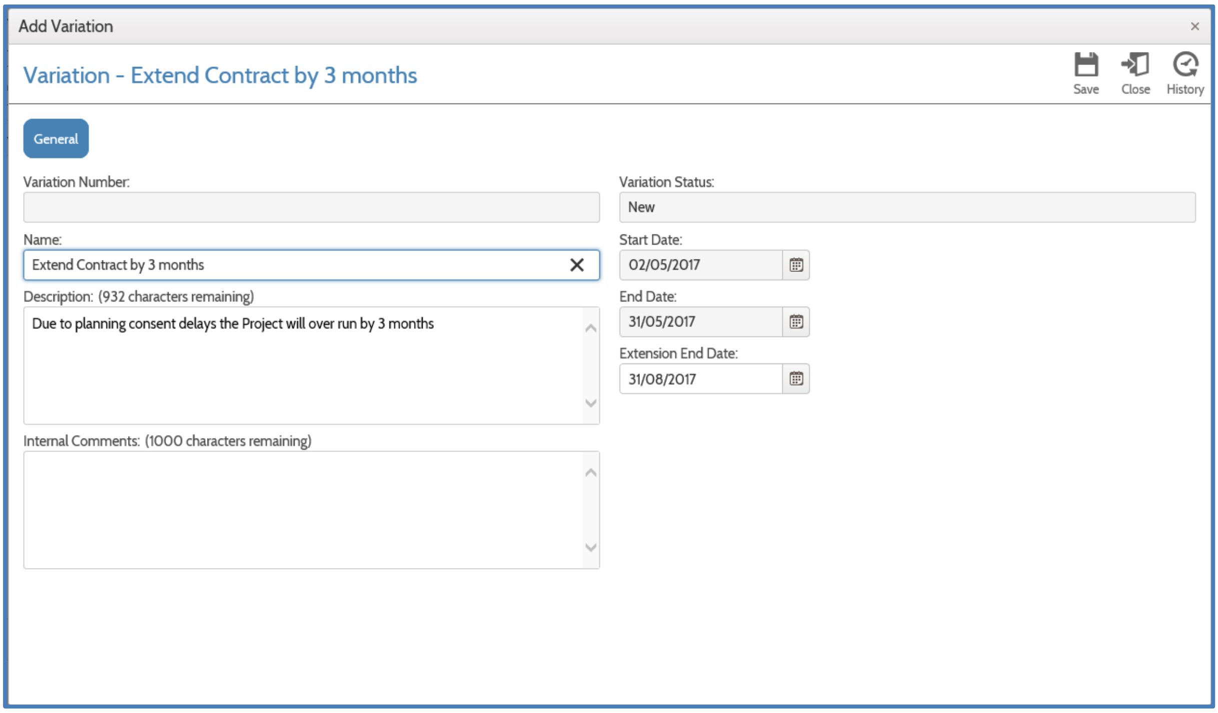


If the option “An extension of the Contract” is selected, and NEXT is clicked the following will be displayed…



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…



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.

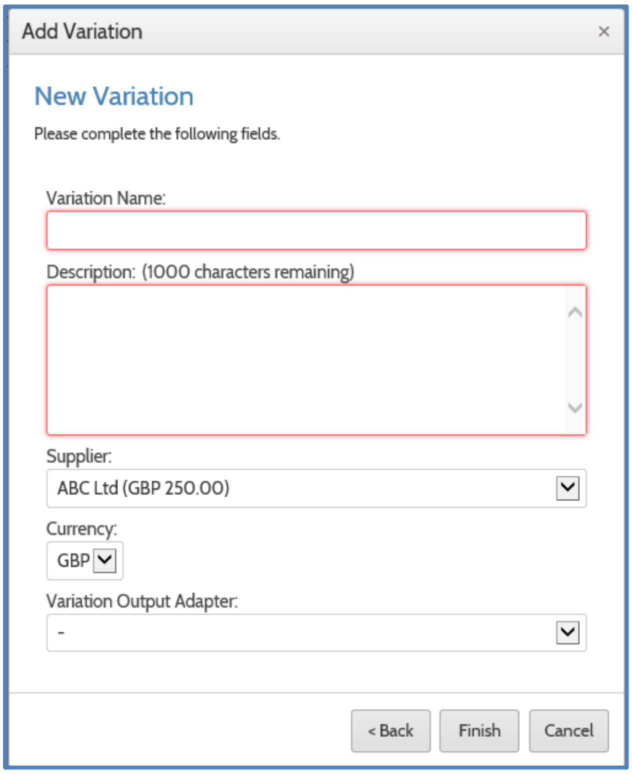
Once the Variation has been sent for approval Users on the Contract that have the permission to Approve Variations will be sent an email and System Message that will ask them to approve the Variation. The Approver will be able to open the Variation as a read-only record and Approve or Reject it. If it 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.

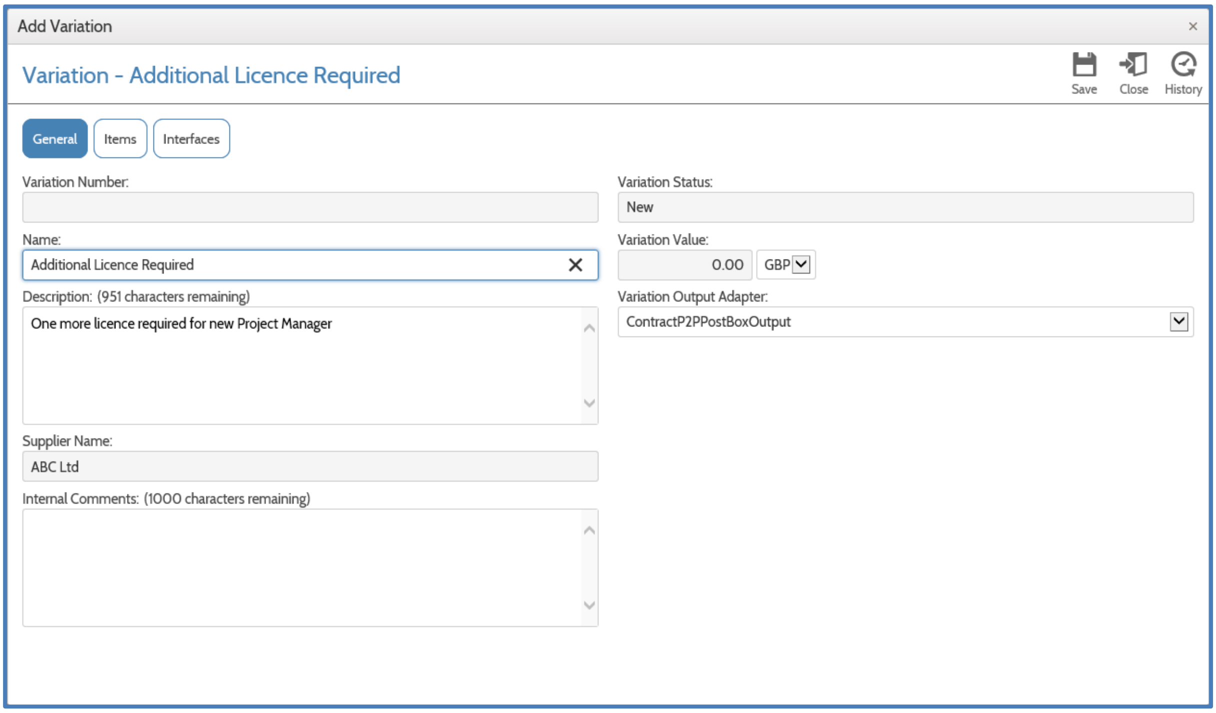
If your The Contract Management System Contract Management Module has been integrated with PROACTIS P2P and Variations are being output then the Extension End Date will be utilised when the Variation is posted after being Approved.

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…



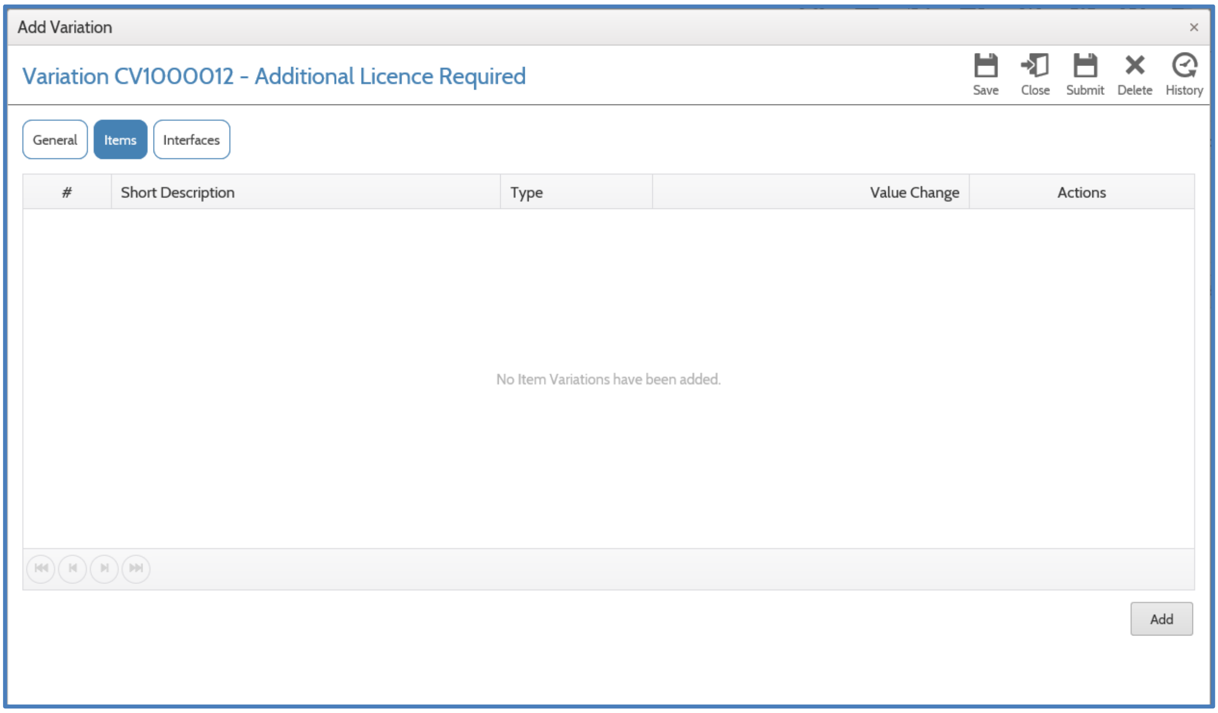
Insert a **Name** and **Description** for the Variation and determine which supplier the variation links to, the currency of the financial change to the contract and the Adapter to use to output the variation to PROACTS P2P (this will only display if the “Output Variations” Contract Setting has been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

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

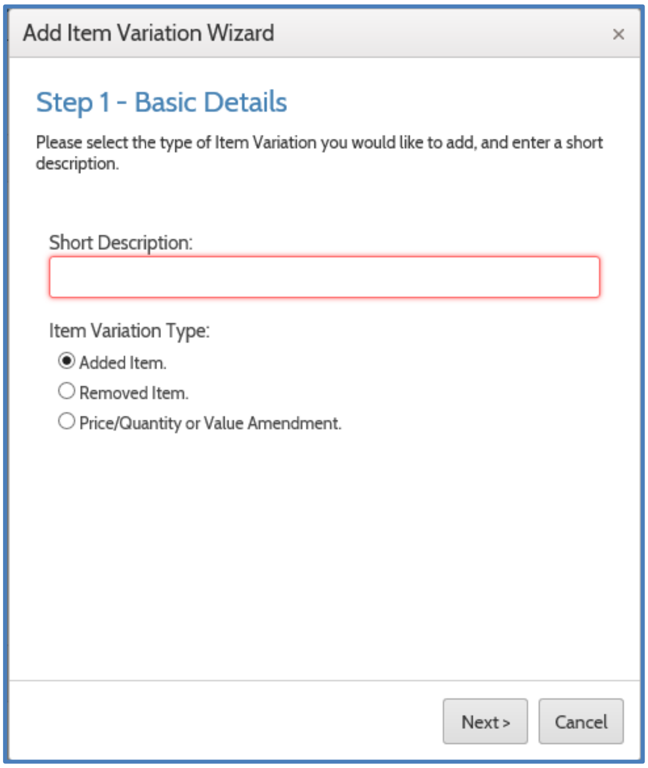


Additional Internal Comments can be added to the Variation. It is advisable to click **Save** at this point so that the Variation Number is generated and the basic elements of the Variation are recorded. NOTE: The Variation Value is a calculated field. This is calculated from the Items associated with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

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



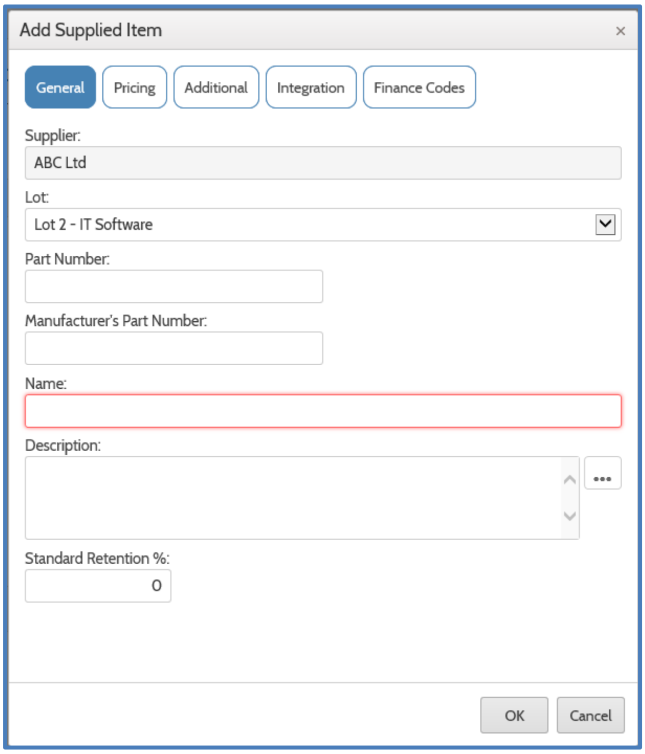
To Add a Variation Item click **Add**…



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

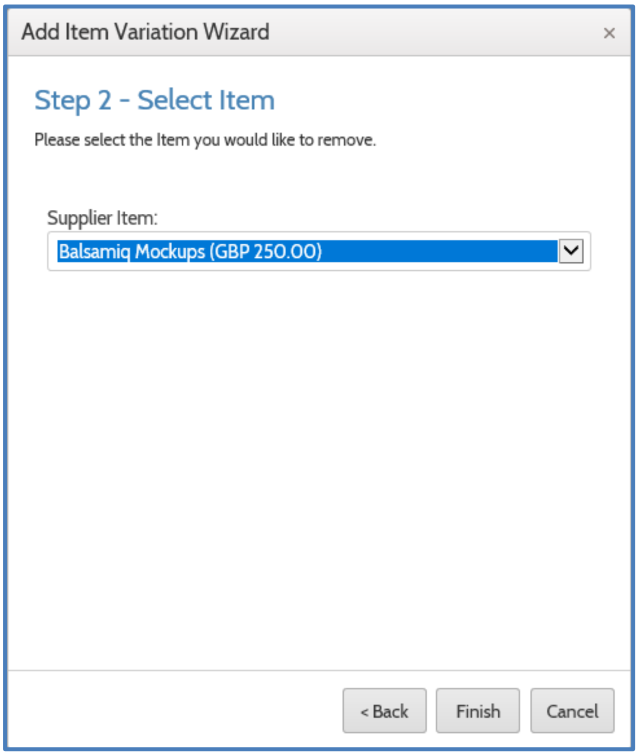
Click **Next** to open the next page of the Item Variation. The next section covers each option above as the pages will differ…

<u>Added Item</u>



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

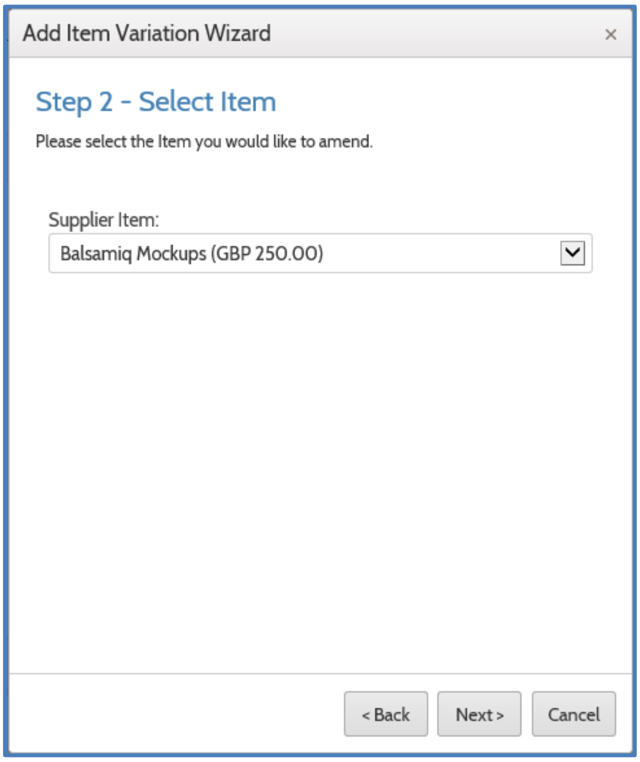
Removed Item



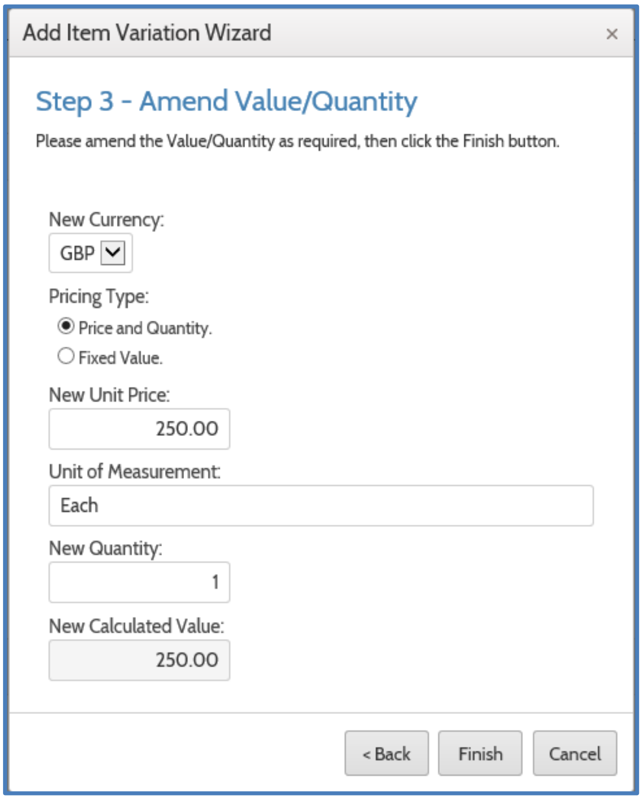
Select the item to be removed and click **Finish**

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…

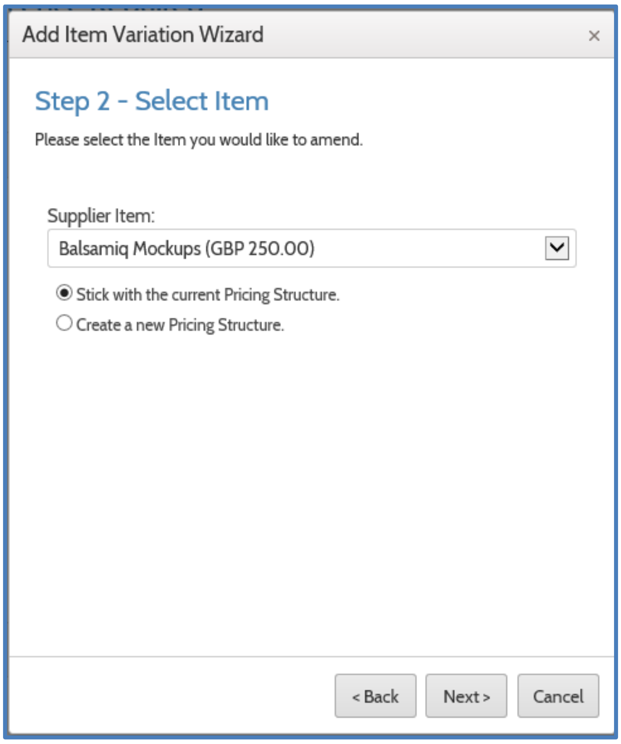


Select the relevant Item and click Next…



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.

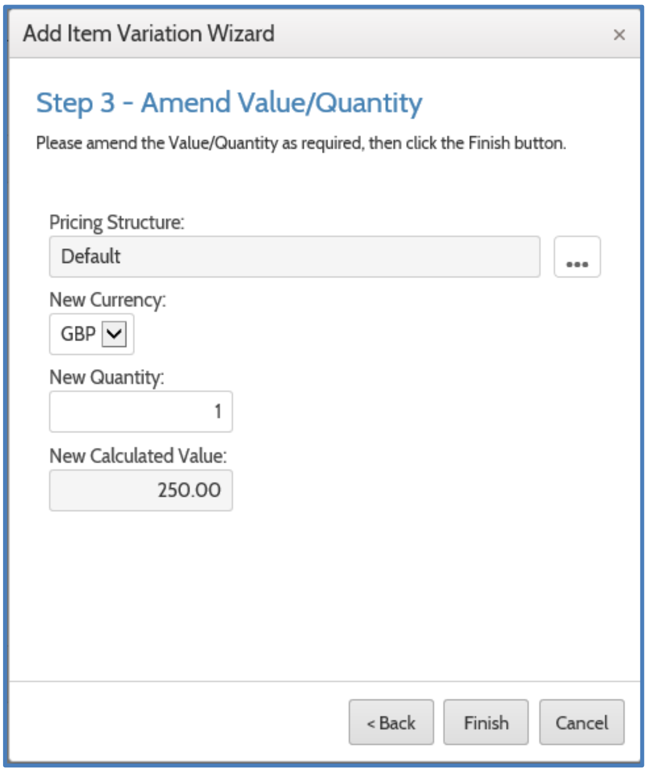
If the Contract Settings allow for “Advanced Item Pricing” then the following pages are displayed when amending Value/Quantity…



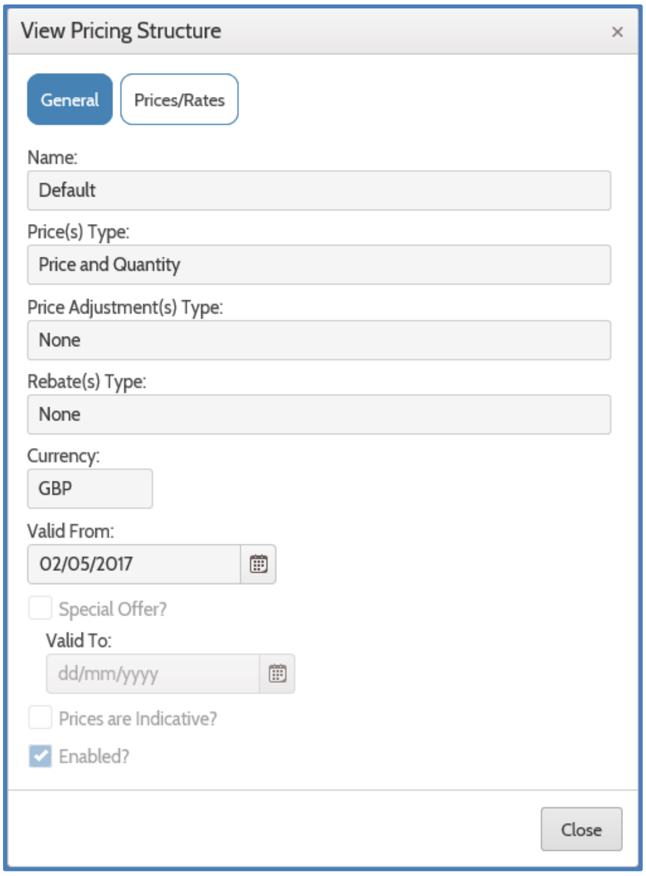
Select the relevant existing item and determine whether it is applicable to “Stick with the current Pricing Structure” or “Create a new pricing Structure” – for example, if the Pricing Structure is set as

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…



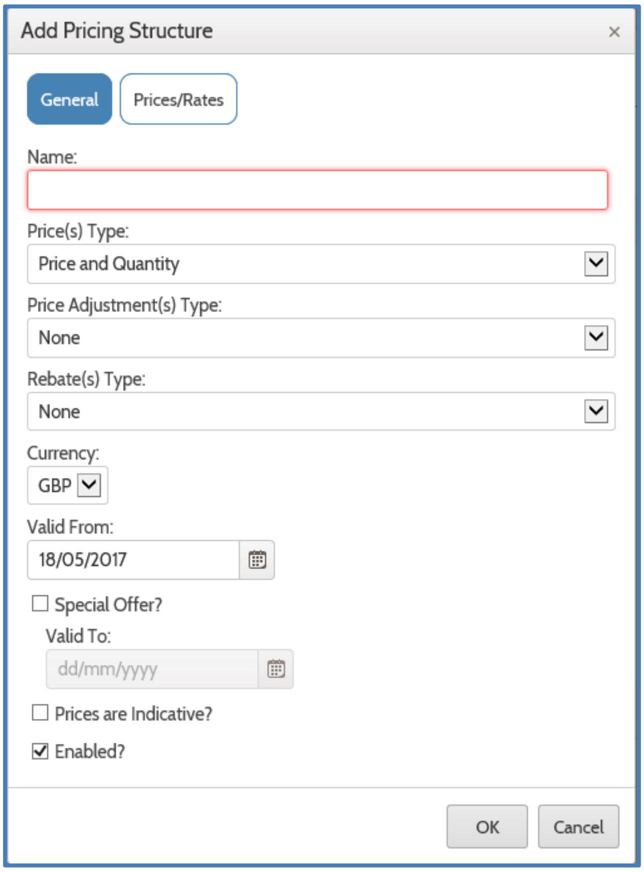
Click on the button to view the relevant Pricing Structure etc.



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

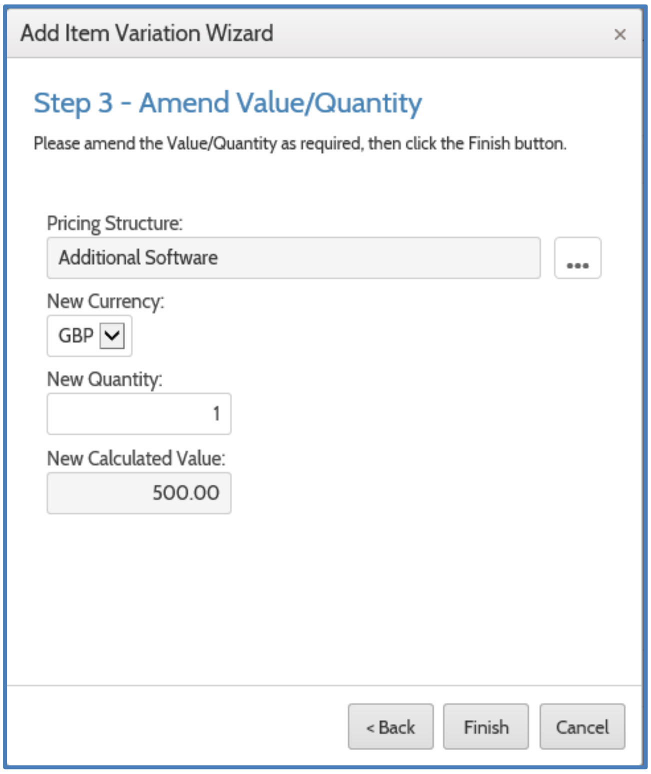
Once complete click on **Finish**.

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



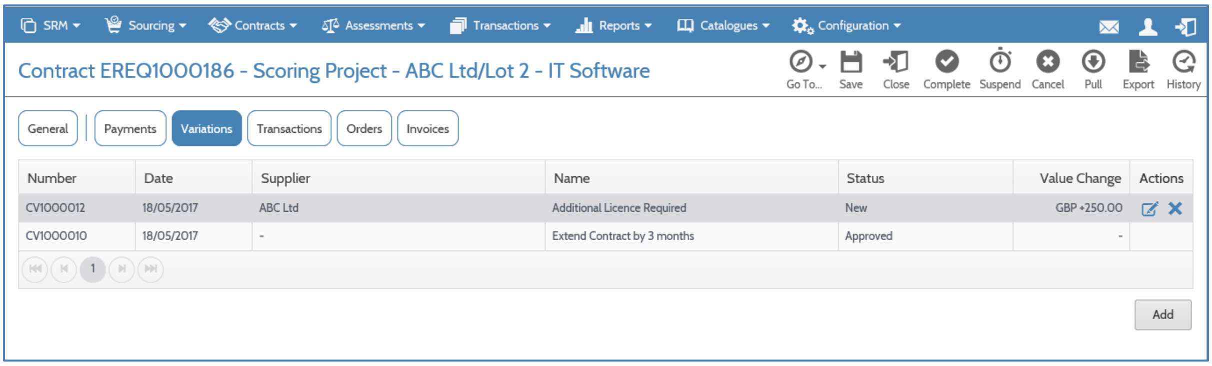
For more information on Items see the appropriate section in this User Guide. Once the **Pricing Type** has been set the **Price/Rates** Tab should be accessed to define the Pricing Structure. Once complete, click on the **OK** button.

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



Insert the Quantity and click **Finish**.

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



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

Remember to click **Save** on the Toolbar

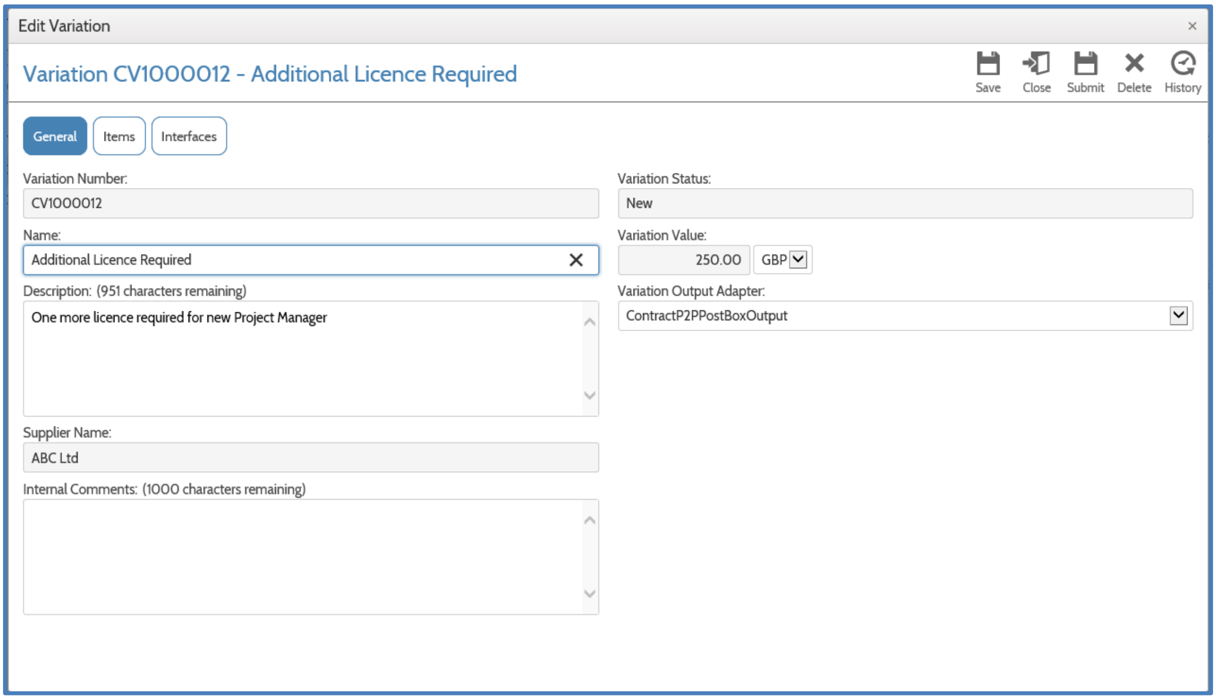
<u>****IMPORTANT NOTE:****</u> ONLY APPROVED VARIATIONS WILL AFFECT A CHANGE ON THE CONTRACT ITEMS TAB. AS SUCH ONLY THEN IS THE PROJECTED CONTRACT VALUE UPDATED ON THE CONTRACT GENERAL TAB (if it is based on the Items in a Contract).

To Amend an existing Variation click 

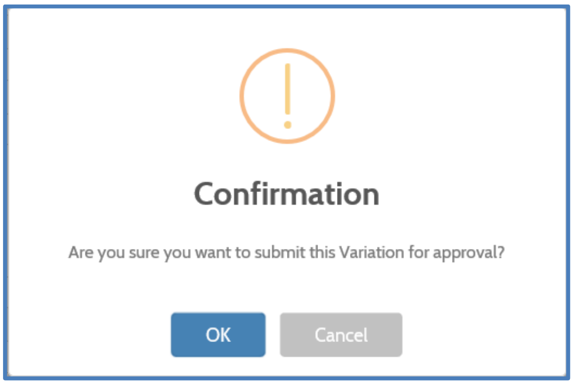
To Delete an existing Variation click 

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

Toolbar button as shown below…

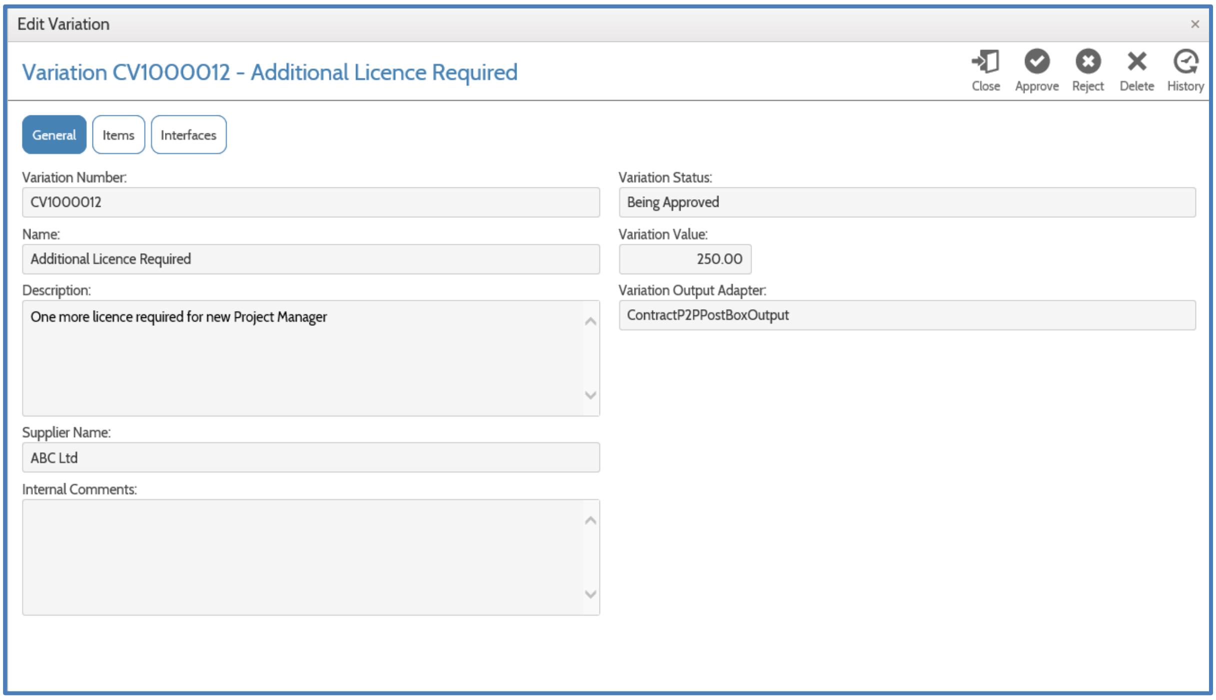


The following will then be displayed…

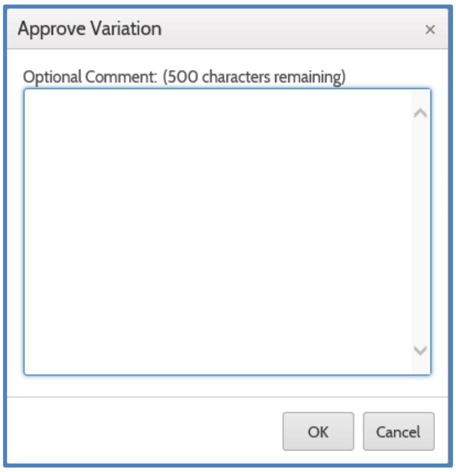


Click **OK** if appropriate

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…



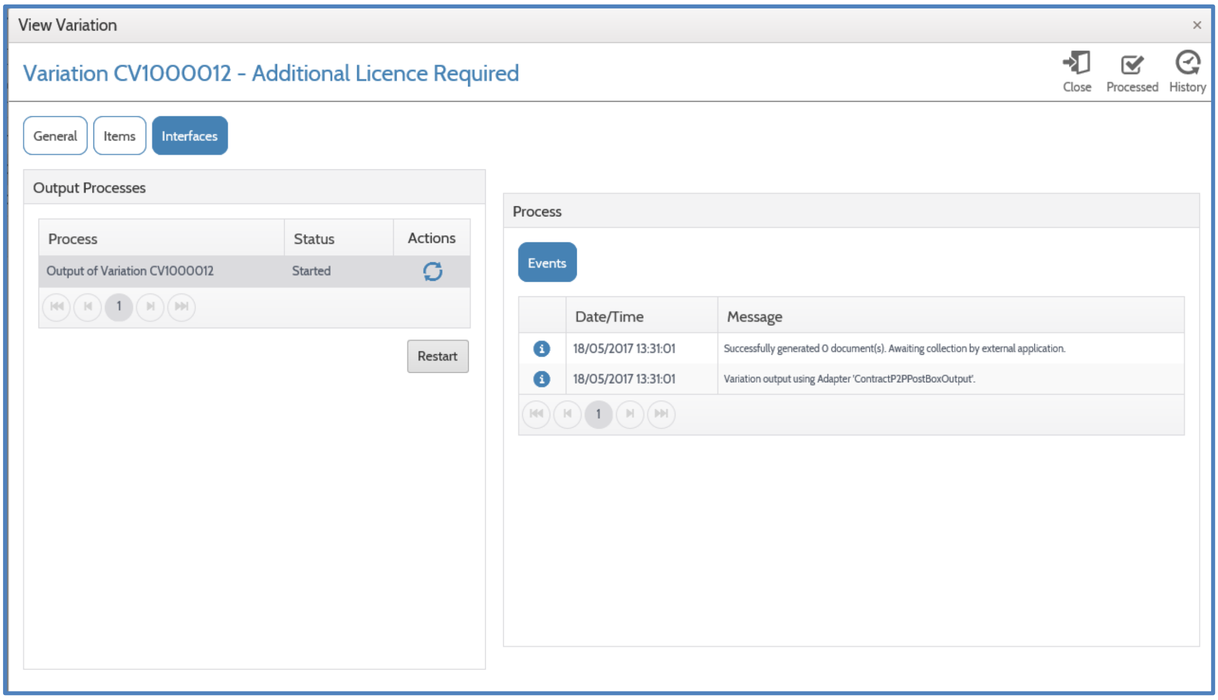
Click on **Approve** or **Reject** as required. In which case the following will be displayed for comments to be added…



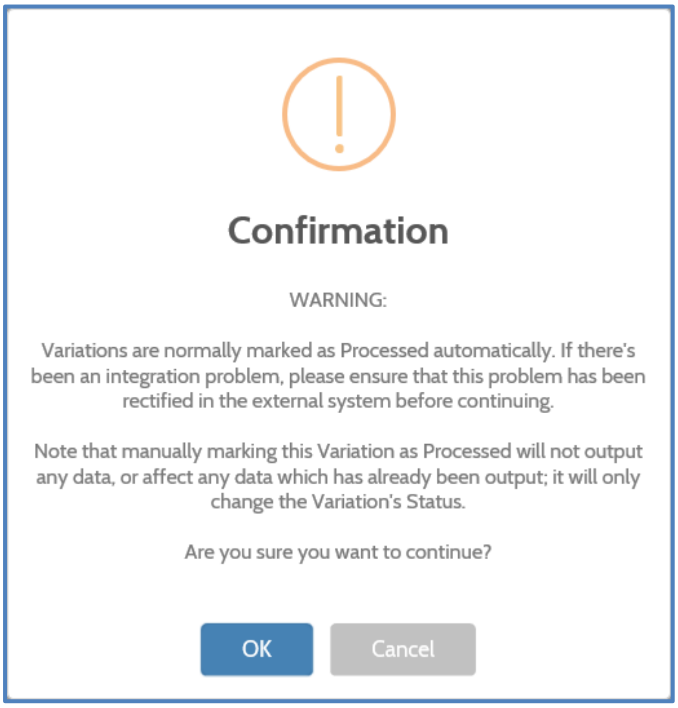
Click **OK**

NOTE: If the Contract Setting for "Output Variations" is set to Yes, a 

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.

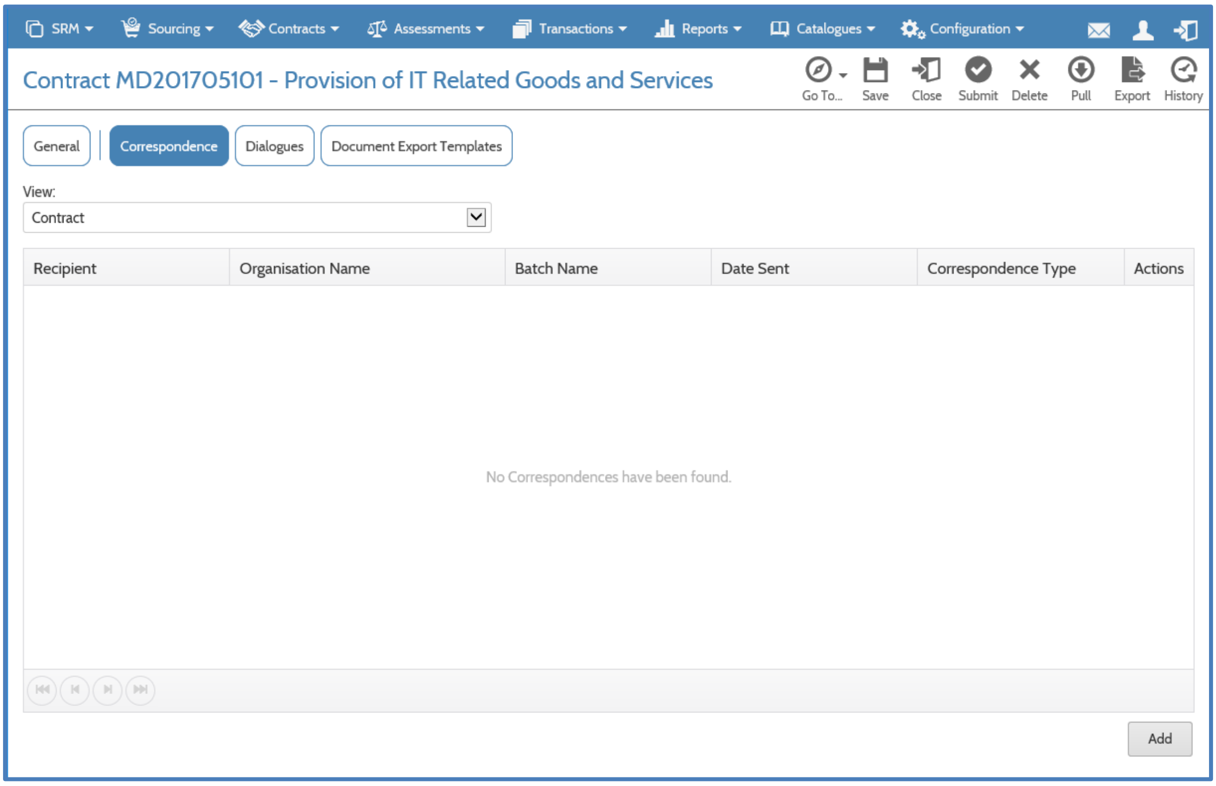


NOTE: if there has been a failure the transaction can be Restarted. The "Processed" button will mark the Variation as Processed. If selected, will display the following warning…



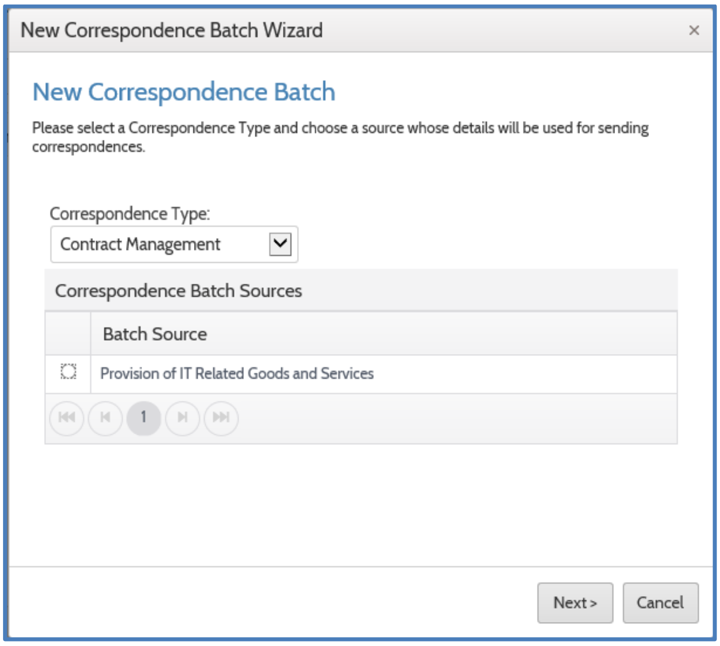
Click **OK** or **Cancel** as appropriate

5.8.12 Correspondence Tab

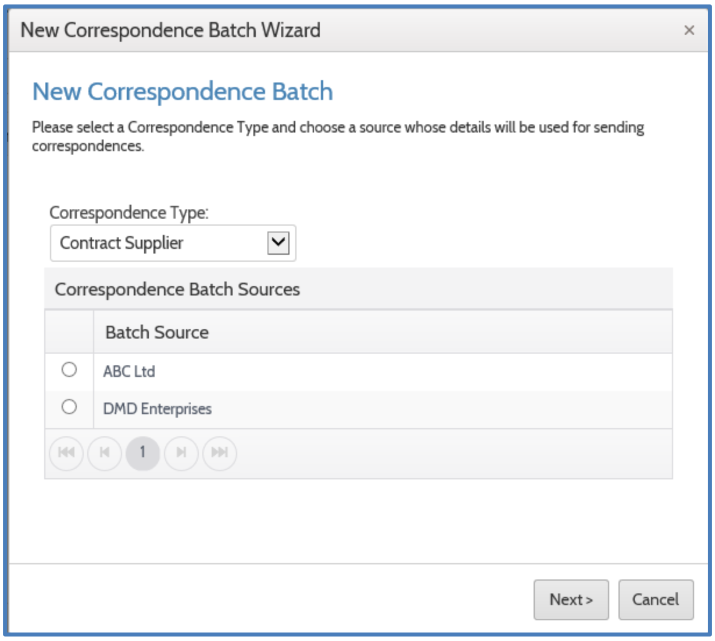


Correspondences (emails) can be generated from a Contract. These may be emails that relate to the Contract as a whole, or to individual suppliers.

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

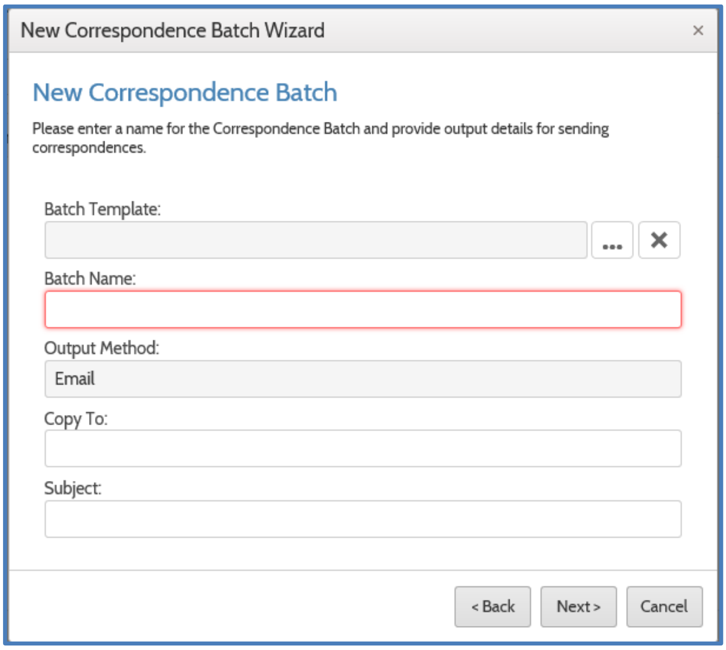


Select the Correspondence Type - Contract Management for the contract (select the relevant contract displayed), or select Contract Supplier… This determines what the correspondence relates to – the Contract itself (Contract Management) or is about a particular Supplier (Contract Supplier)



Select one of the Suppliers listed

Click **Next**

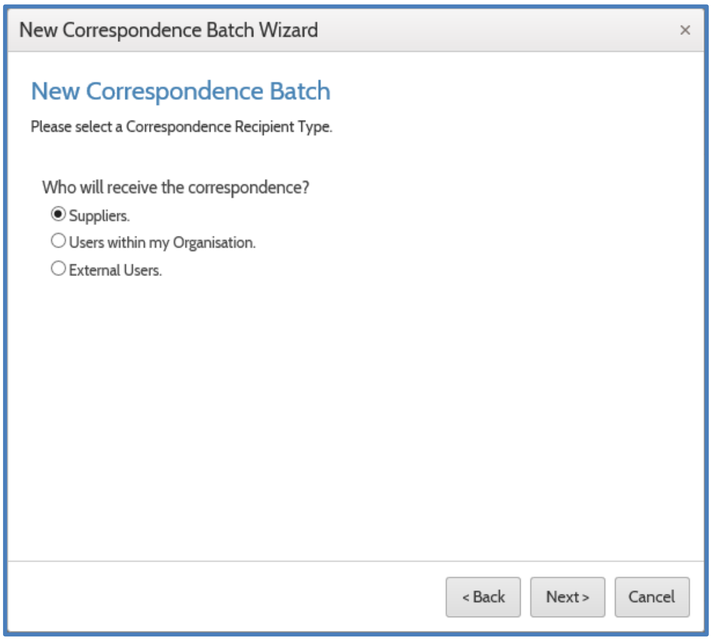


Select a Batch Template, if appropriate (see the Buying Organisation Configuration User Guide for more details on Correspondence Templates) – this is optional

Insert a Batch Name

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

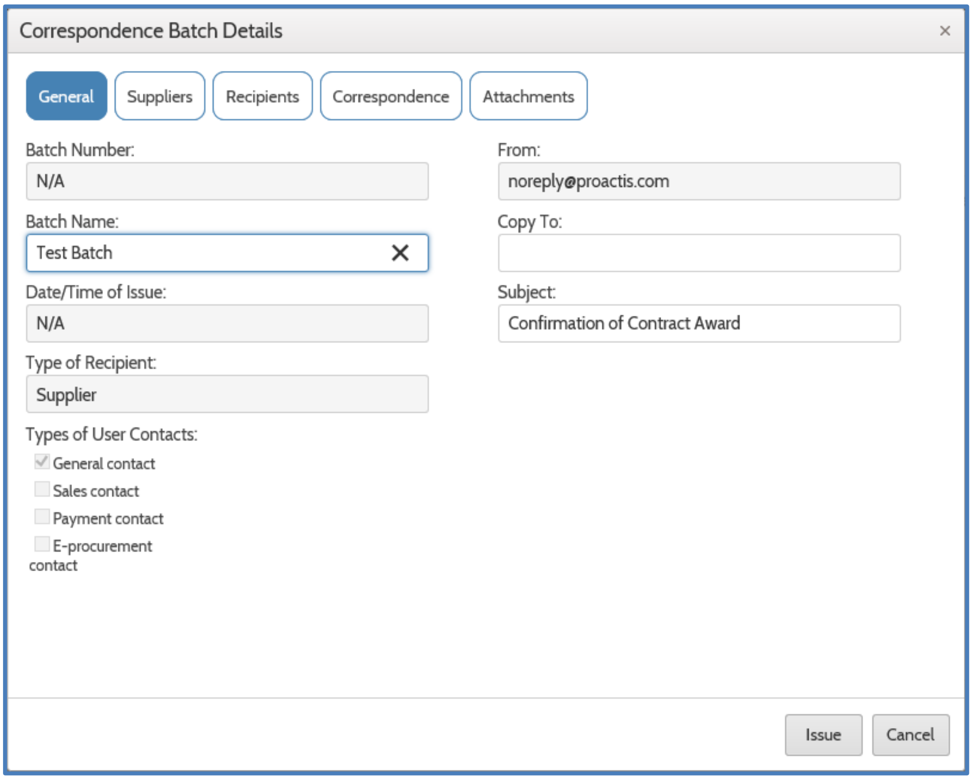
Insert a Subject and Click **Next**



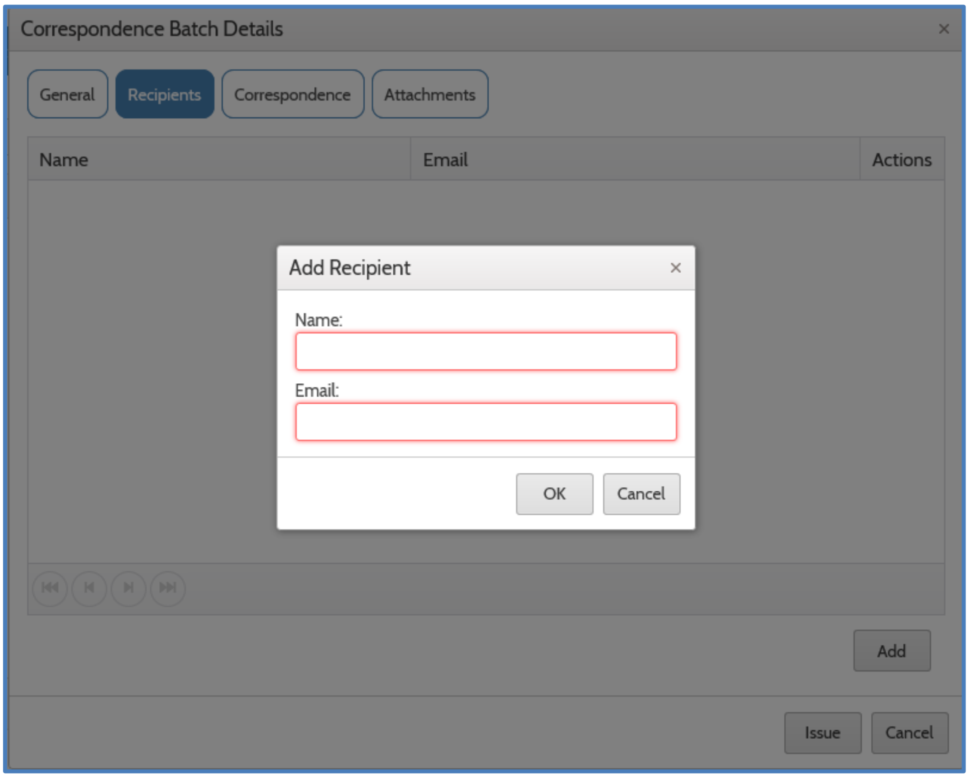
If Suppliers is selected and the Correspondence Type was set to Contract Management all suppliers from the Contract will be added, however if the Correspondence Type was set to Contract Supplier, it will be the Supplier selected on the first page of the Correspondence Wizard that will be added. There 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.

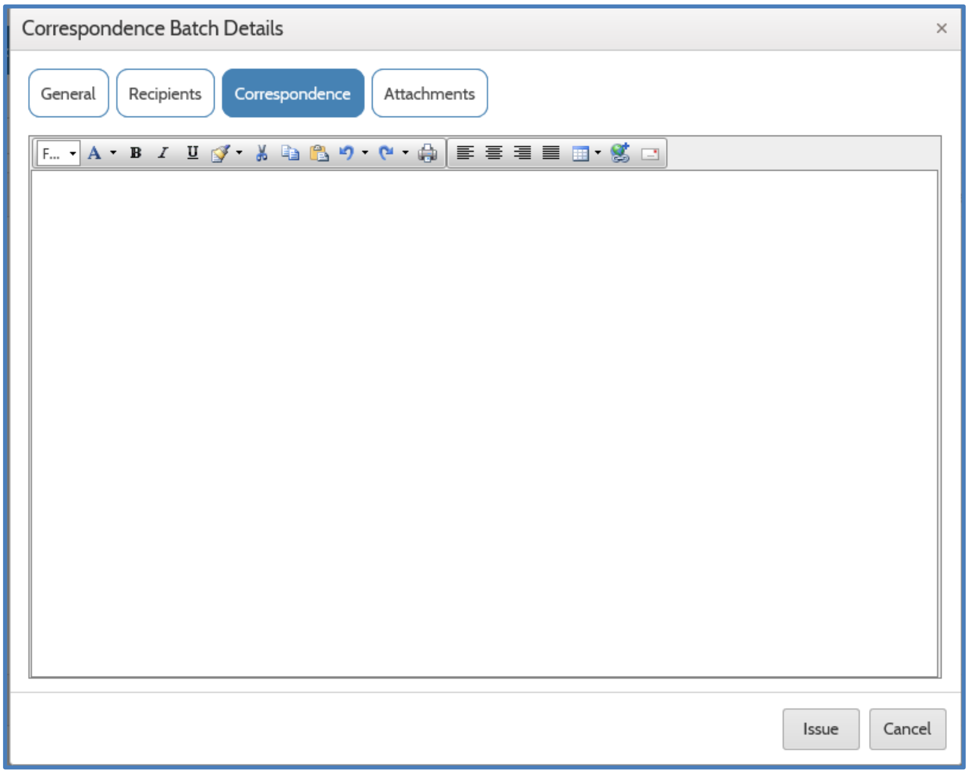
On completion of the initial Wizard the following will be displayed…



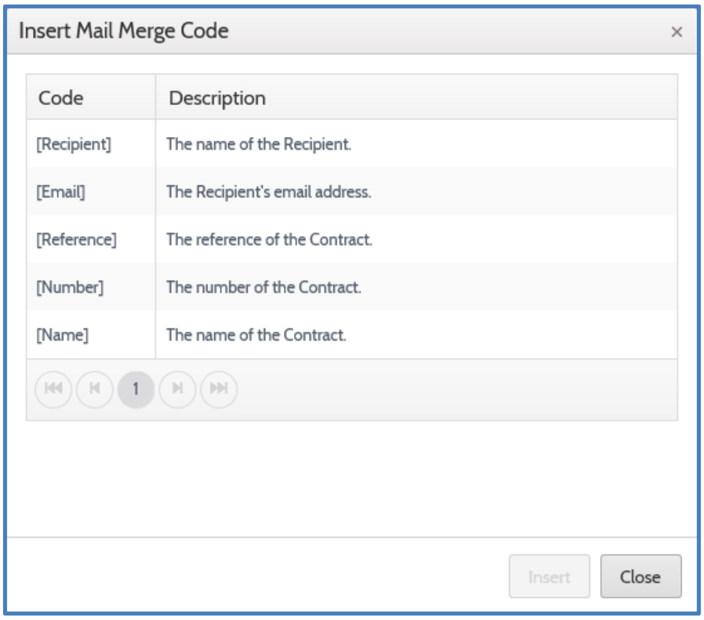
The Recipients Tab as noted will either be pre-completed with a list of supplier contacts or will need recipients added (The Contract Management System Buyer Users or External contacts). The example below shows the situation where External users are being contacted about the contract…



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

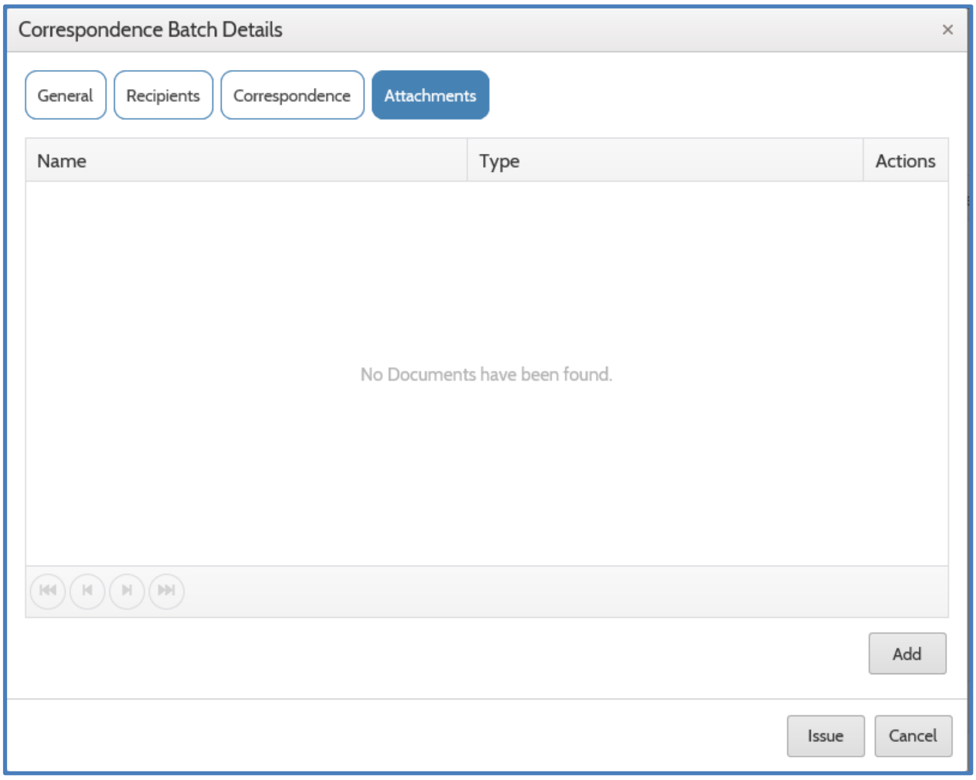


Insert the relevant text for the Body of the Email to be sent. The formatting toolbar can be used to set font size and colour, text can be aligned, and tables can be inserted. In addition mail merge fields can be used to automatically insert data from the system. To do so, click on the  button on the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



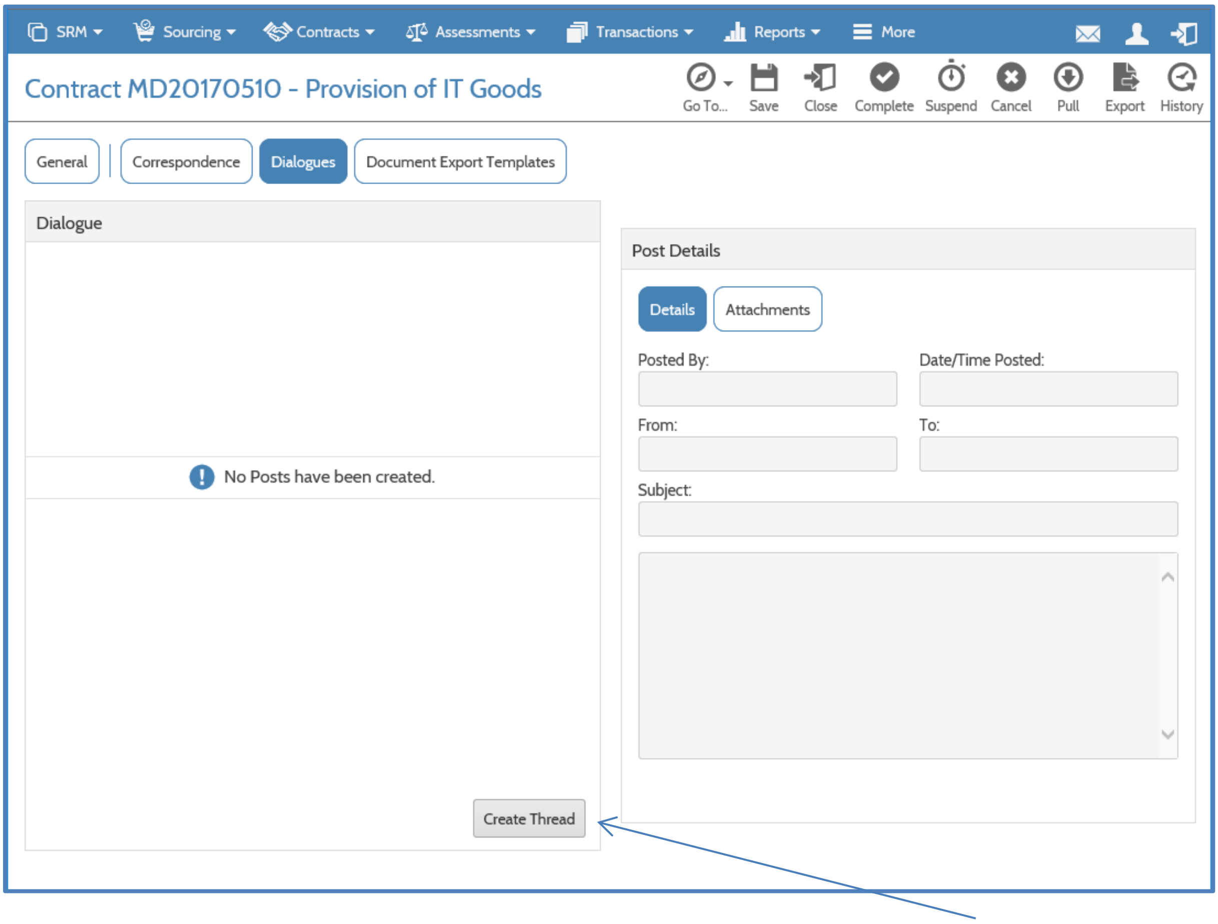
Select the relevant Mail Merge Code and click **Insert**

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

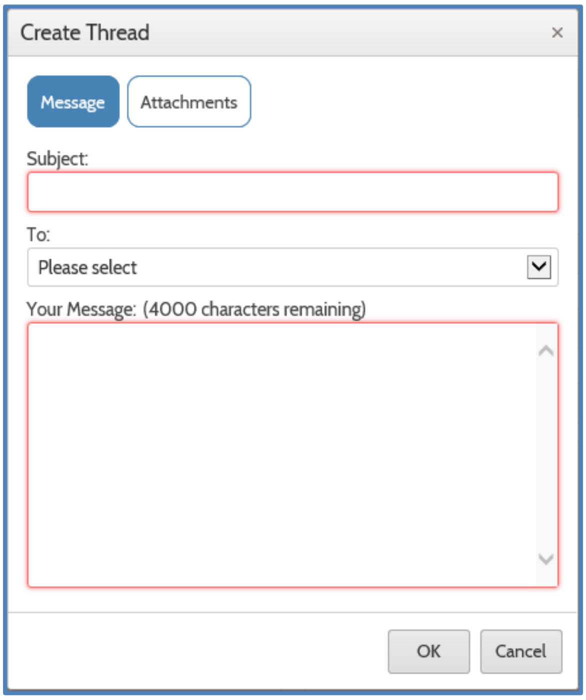


Once all relevant details are complete click on the **Issue** button to send the email

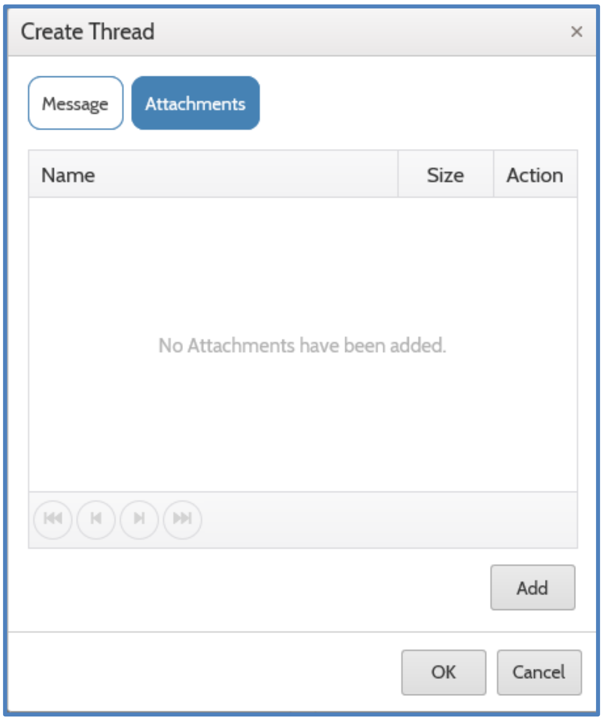
5.8.13 Dialogues Tab



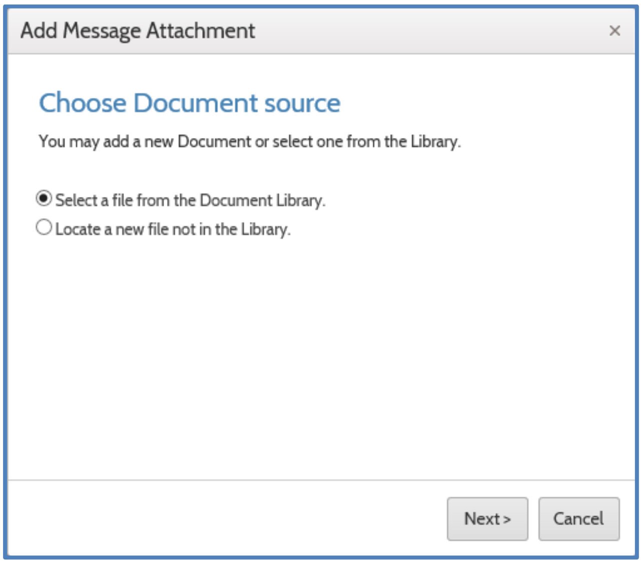
To create a Dialogue for a Supplier or All Suppliers on the Contract click the **Create Thread** button



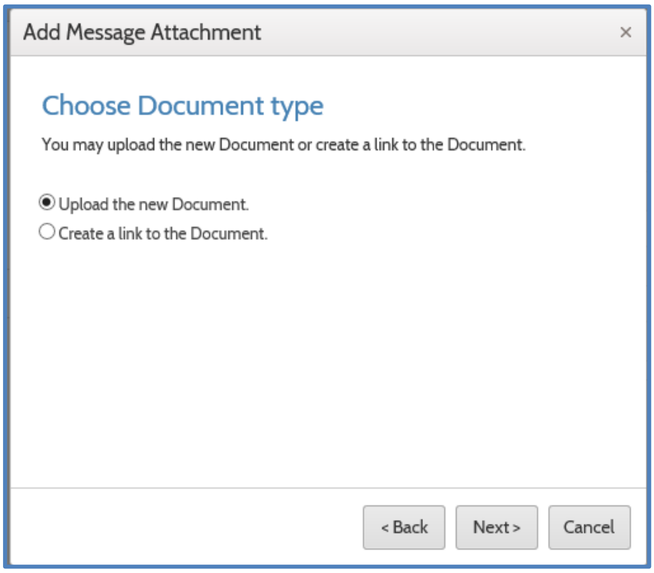
Insert a Subject, select if “All Supplier” are to receive the message or just an individual supplier, and insert the Message content. Documentation may be added to the dialogue message by accessing the **Attachments** Tab…



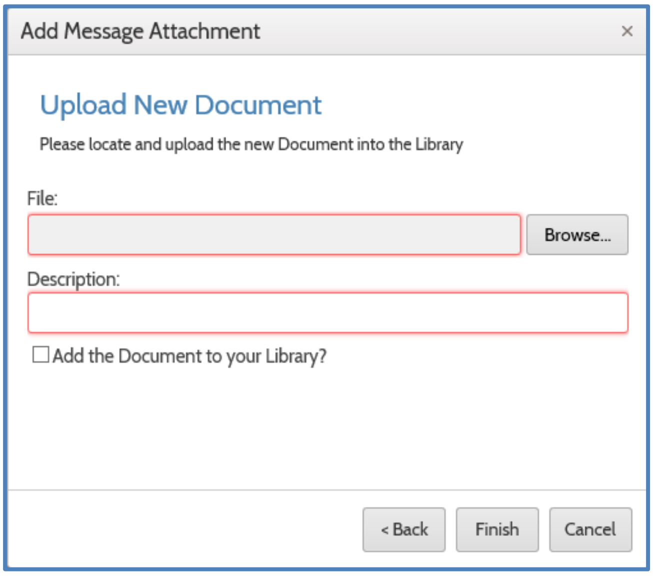
Click **Add**



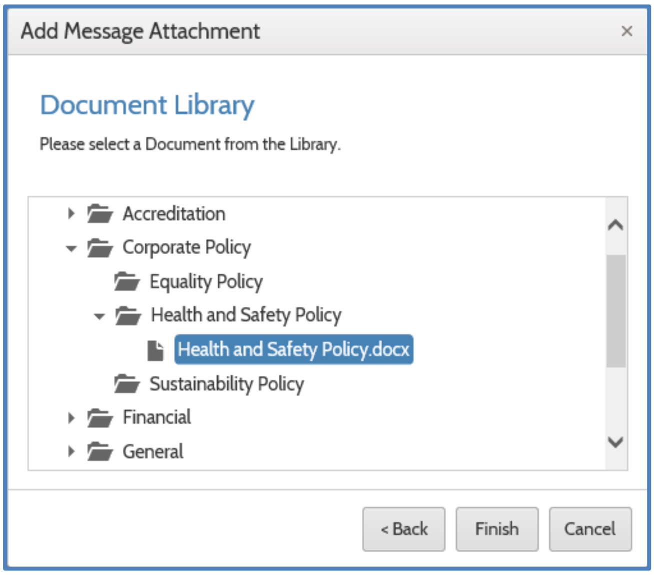
If the default to select from a Library is selected the Buying Organisation's Document Library will be displayed to select the relevant document. If the "Locate a new file not in the Library" option is selected the next page will be displayed as follows…



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

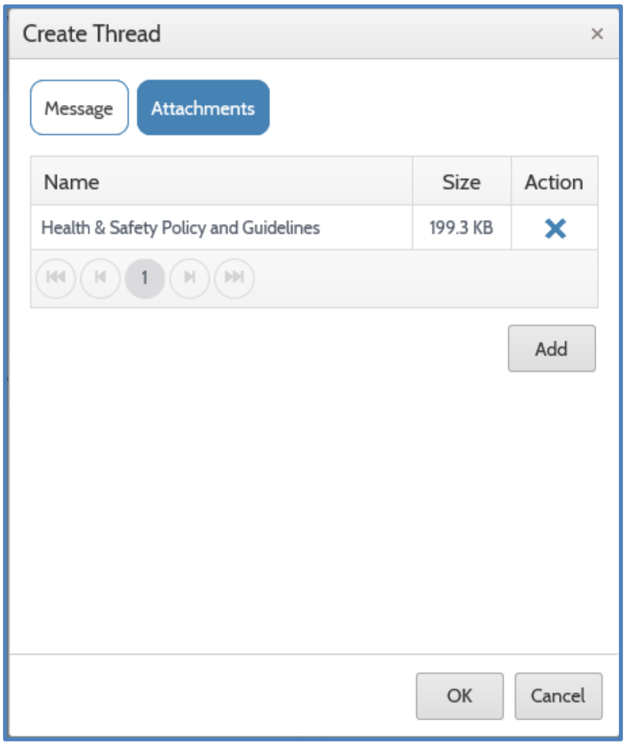


Click **Browse…** and navigate to and select the file to attach and insert a **Description**, and determine if the Document should be added to the Buying Organisation's Document Library. If this latter option is ticked a further series of pages will appear that will require the document to be added to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



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

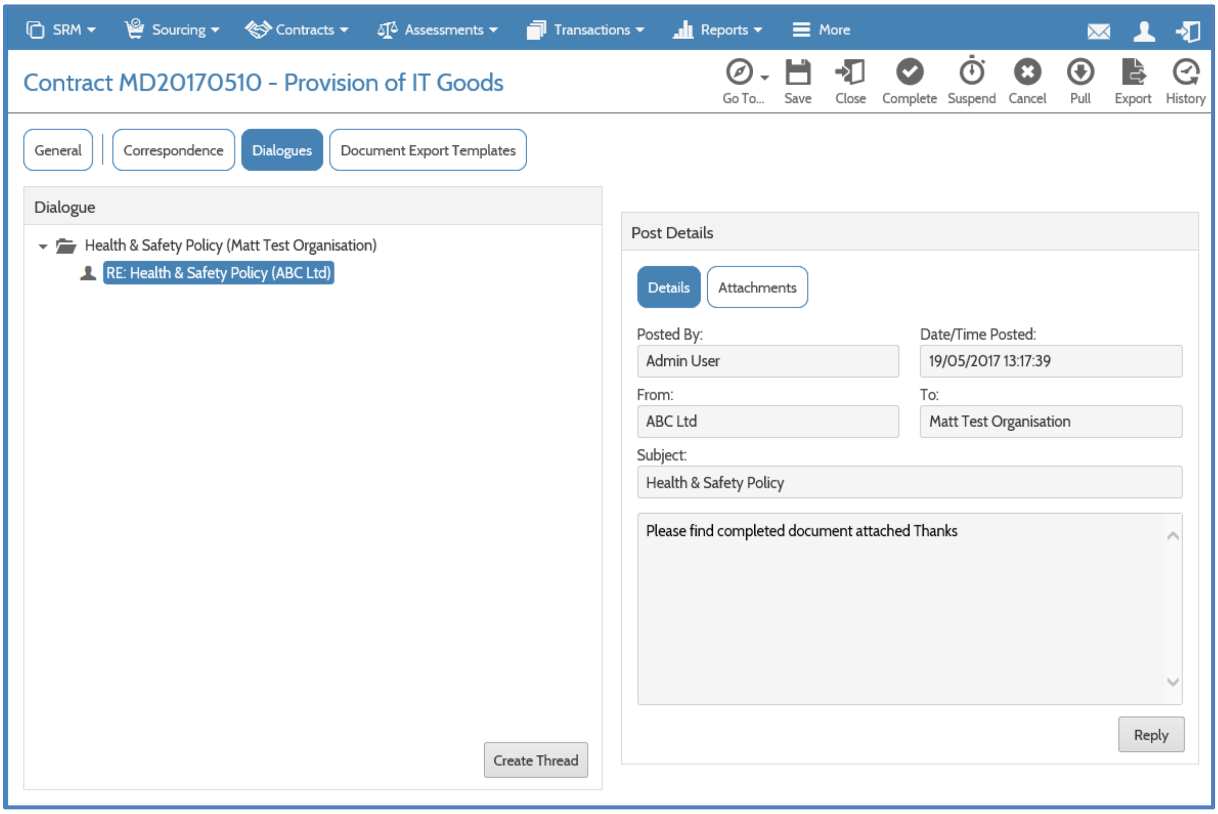
Once this has been completed the Document is added to the Attachments Tab



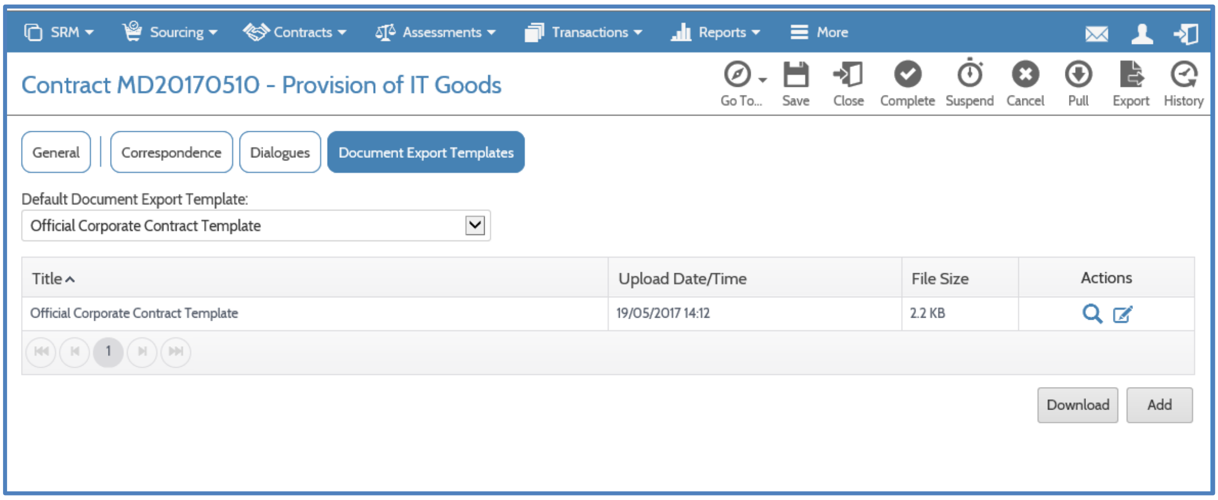
Repeat as necessary and remove any attachments by clicking on the icon

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…



5.8.14 Document Export Templates

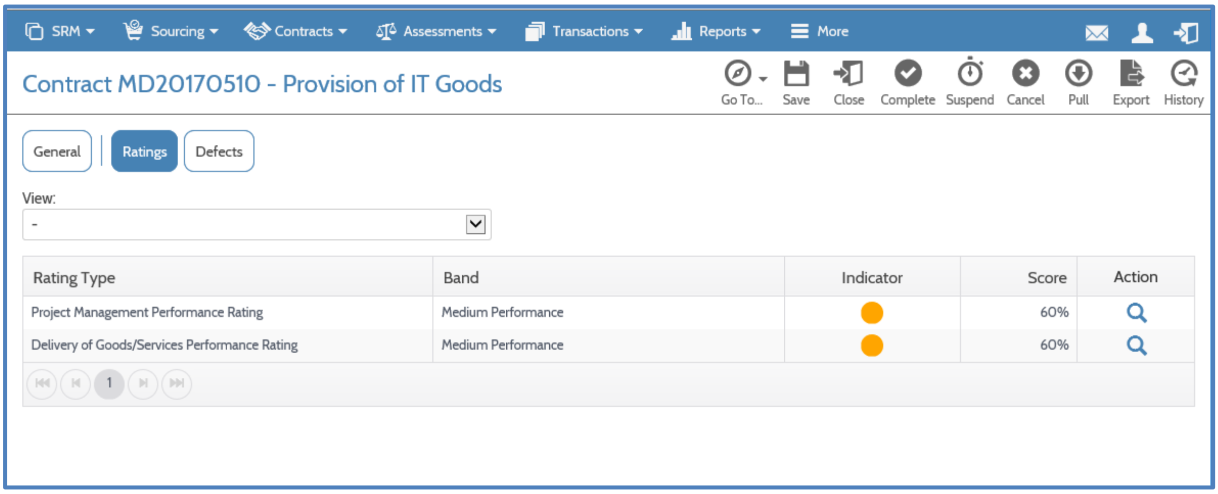


For more information on the process of setting up the use of this functionality see Section **Error! Reference source not found.**

Note that the permission-based 

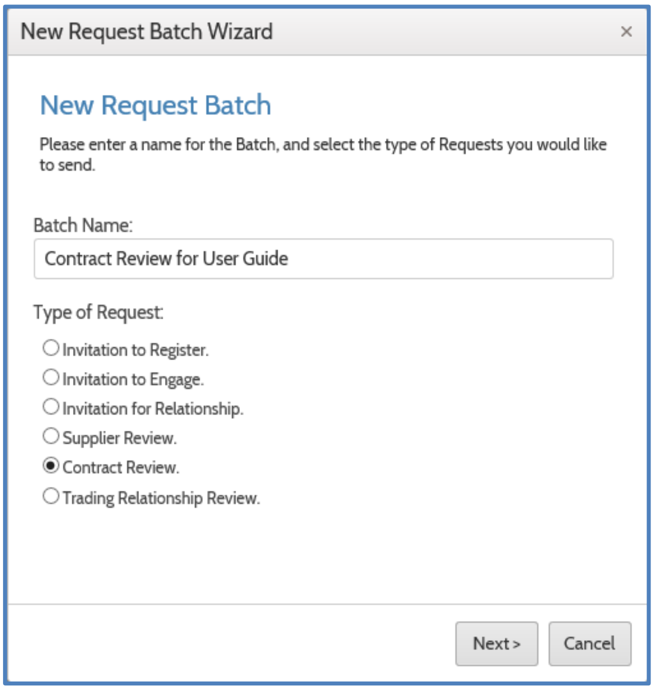
Toolbar button can be used to extract the final document containing Contract-specific information held in the Data Source

5.8.15 Ratings Tab

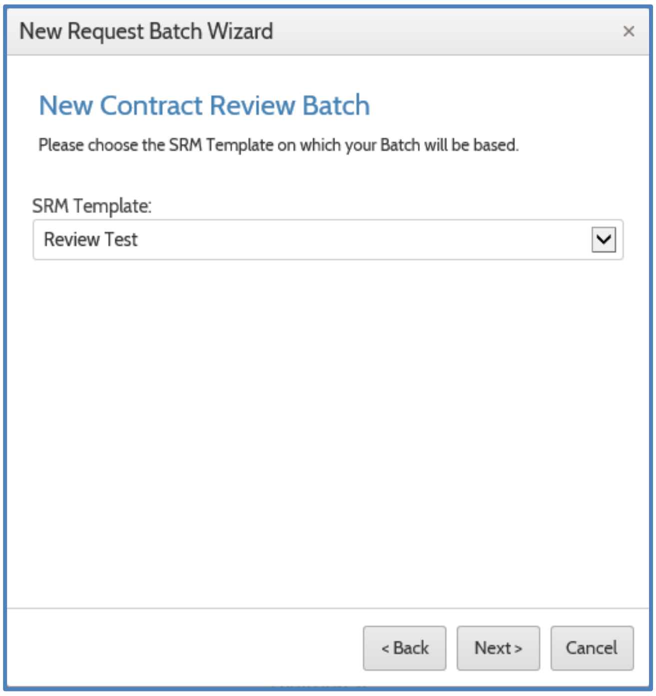


This is a Read Only page and the View filter can be used to toggle between Suppliers or view the overall Contract Performance Ratings.

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

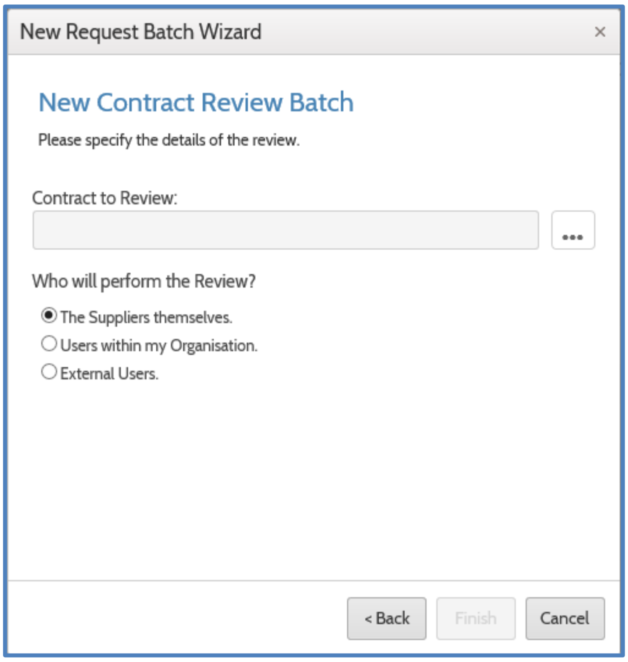


Select the Contract Review option as above and click **Next**

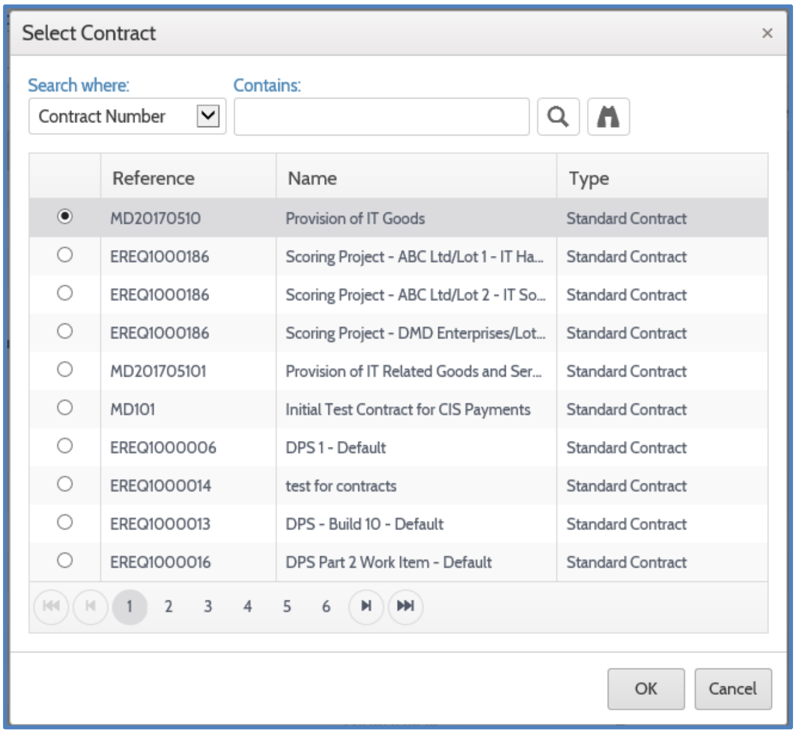


Select an appropriate SRM Template – NOTE: this must contain a Questionnaire that has Sections linked to a Rating Type (see the SRM User Guide for more information on SRM Templates).

Click **Next**

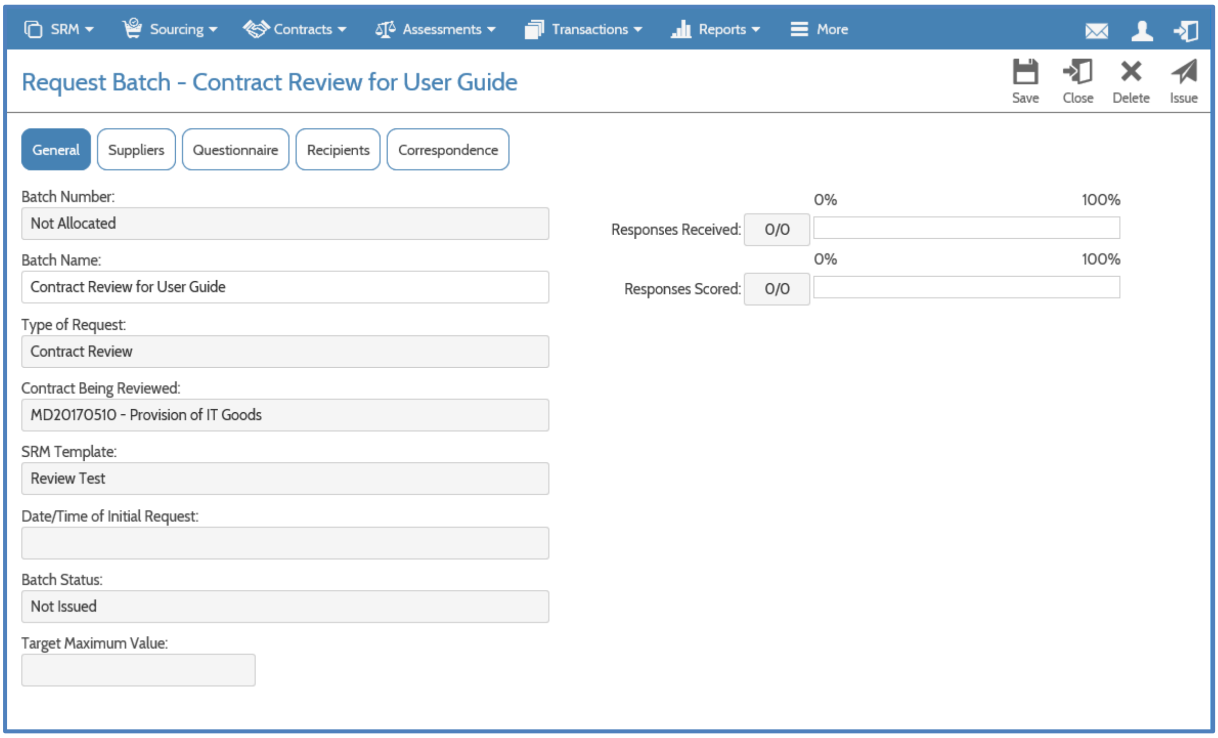


Click to open the pop up dialog below which will allow for Contracts to be searched for and for a specific contract to be selected as the review subject.



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 Contact and their email address can be determined).

Click **Finish**



The SRM Request batch is then displayed.

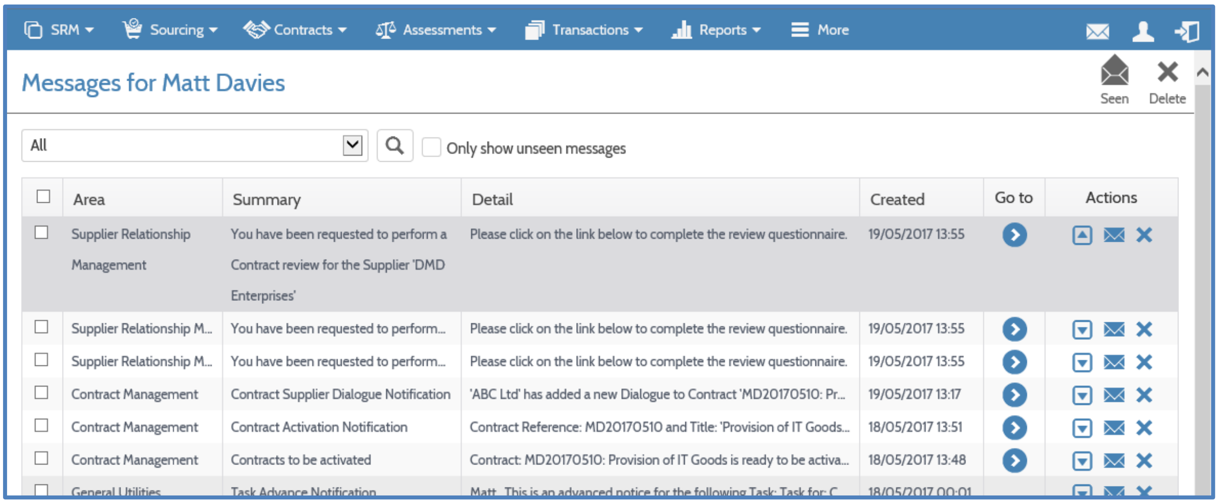
The Suppliers Tab will list the Suppliers on the Contract that will be reviewed as part of this process. IMPORTANT: it is assumed that all Suppliers will be reviewed for consistency. As such if Suppliers are removed they cannot be added back in.

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

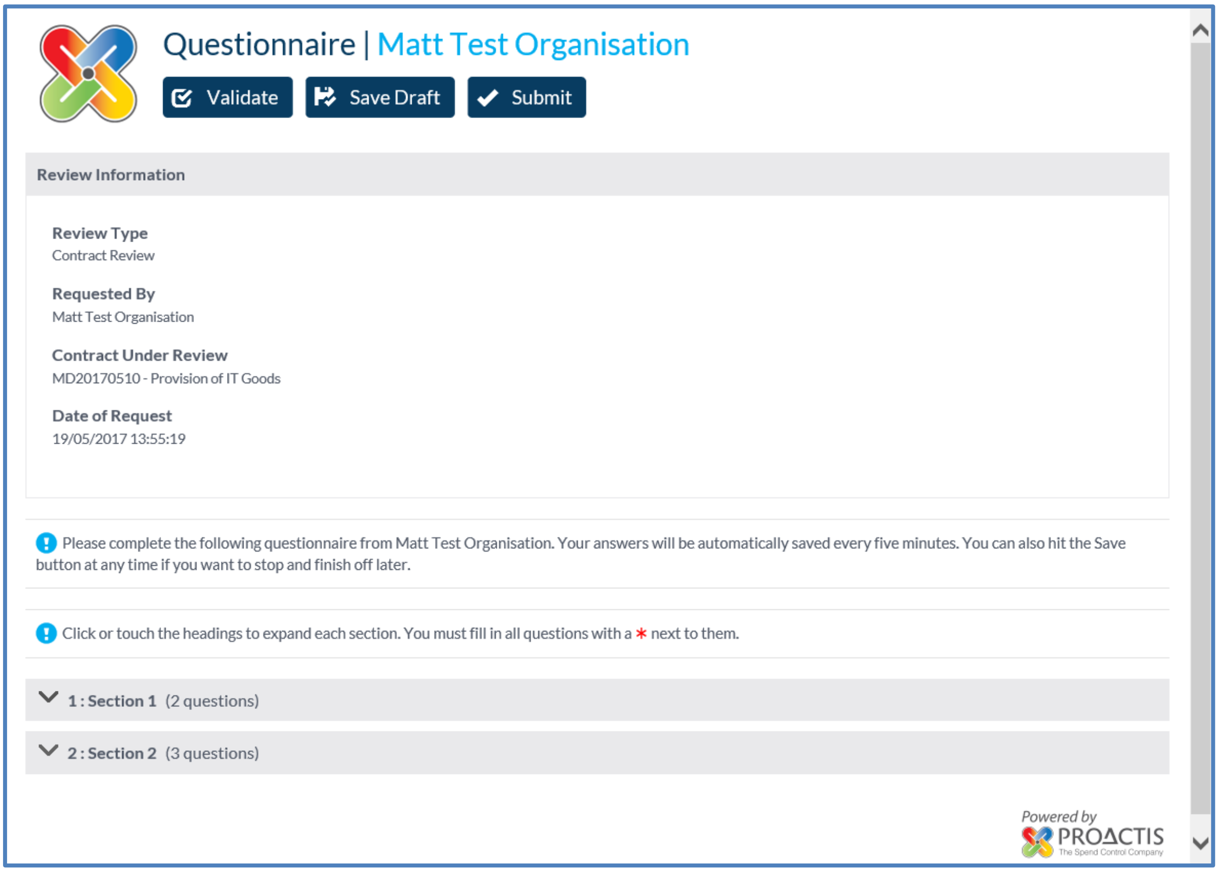
Suppliers are reviewing themselves then this Tab will not be displayed as the default SRM Contact for the Supplier Organisation will be contacted. If Buyer Users are performing the review of each supplier on the contract those users will need to be defined, and further if External Users is set then adding 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…



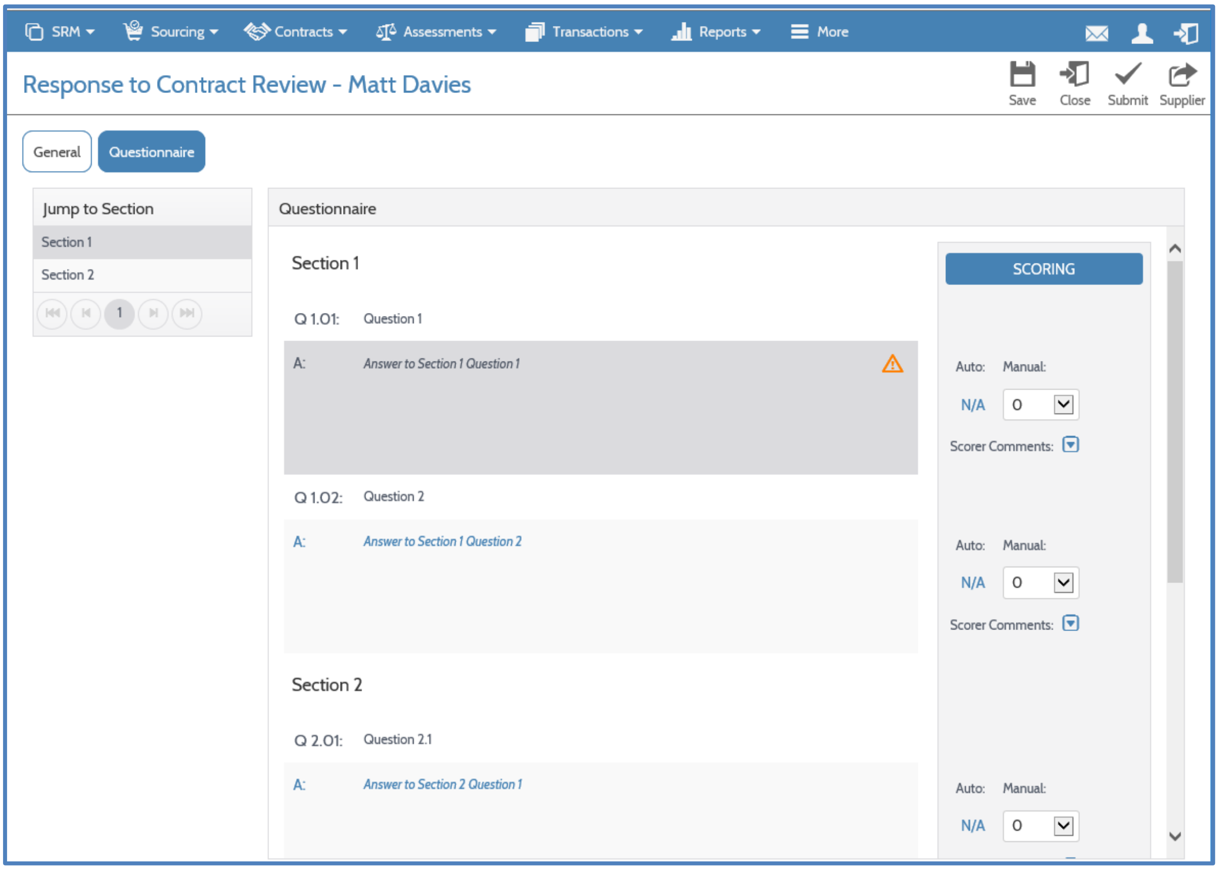
Clicking the Go To button (or using the link in the email) opens…



This is then submitted

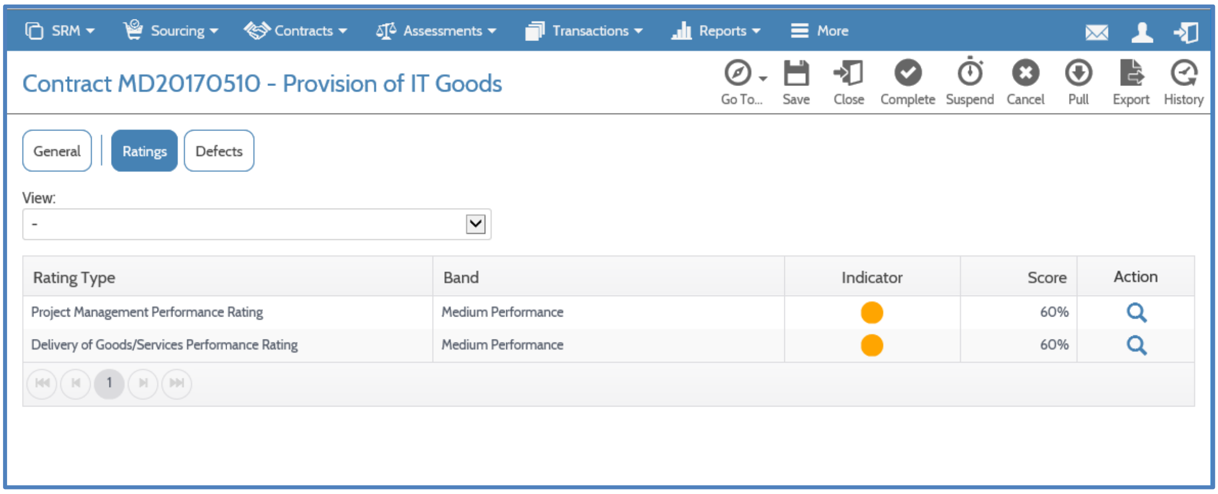
NOTE: If any documents were attached to the SRM Template these will be displayed here.

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)



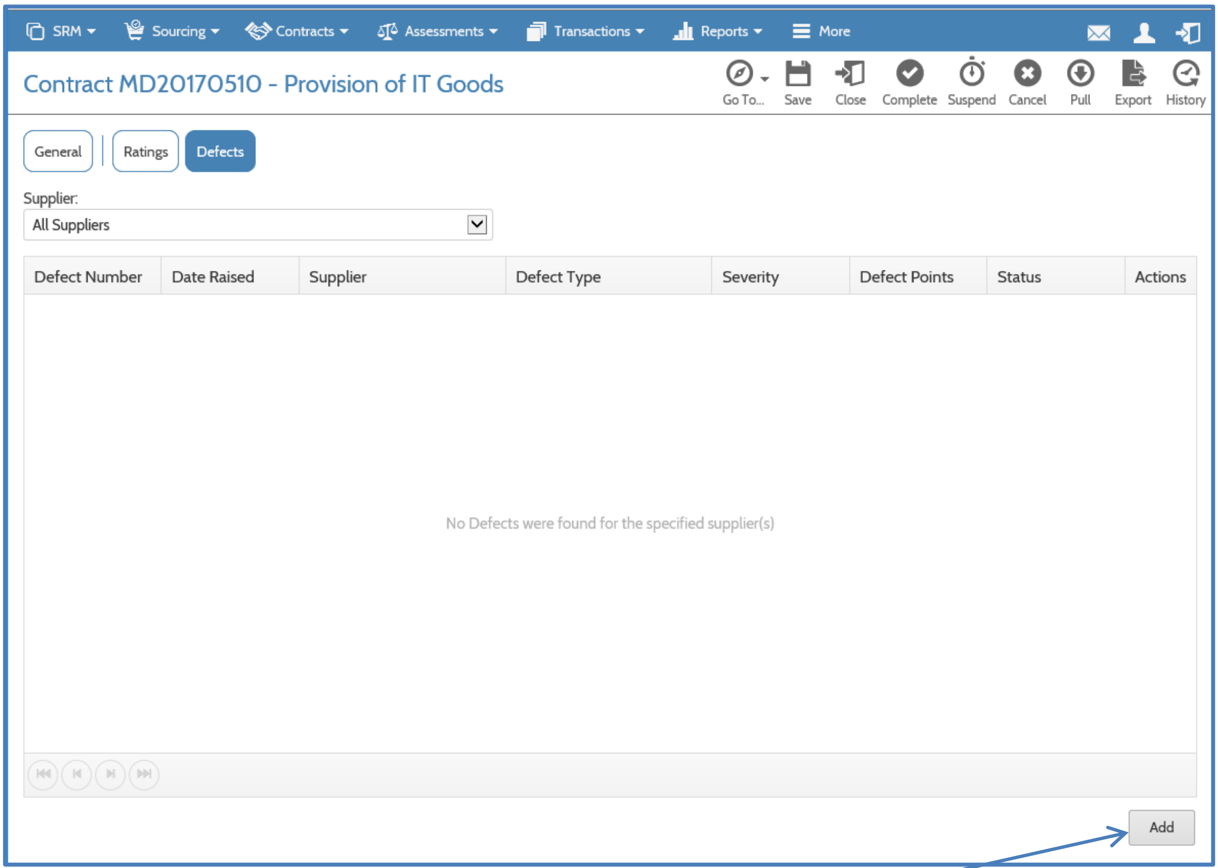
The Scores are set and then Submitted

The Ratings will display immediately on the Contract as below…



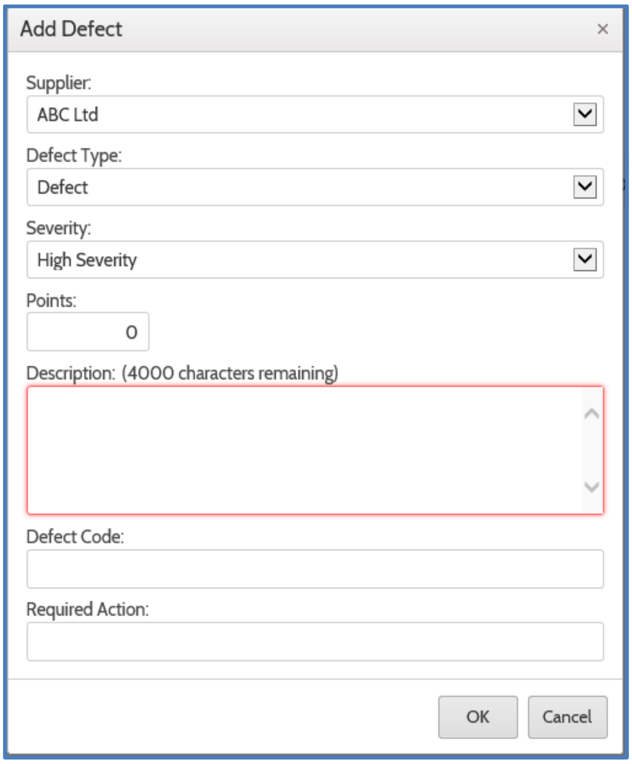
The default View is to display the statistics for ALL SUPPLIERS – that is, Contract Level Ratings. The **View** filter can be used to select a specific Supplier and view their Statistics. Selecting will display a pop up that shows all the data from all reviews

5.8.16 Defects Tab



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.

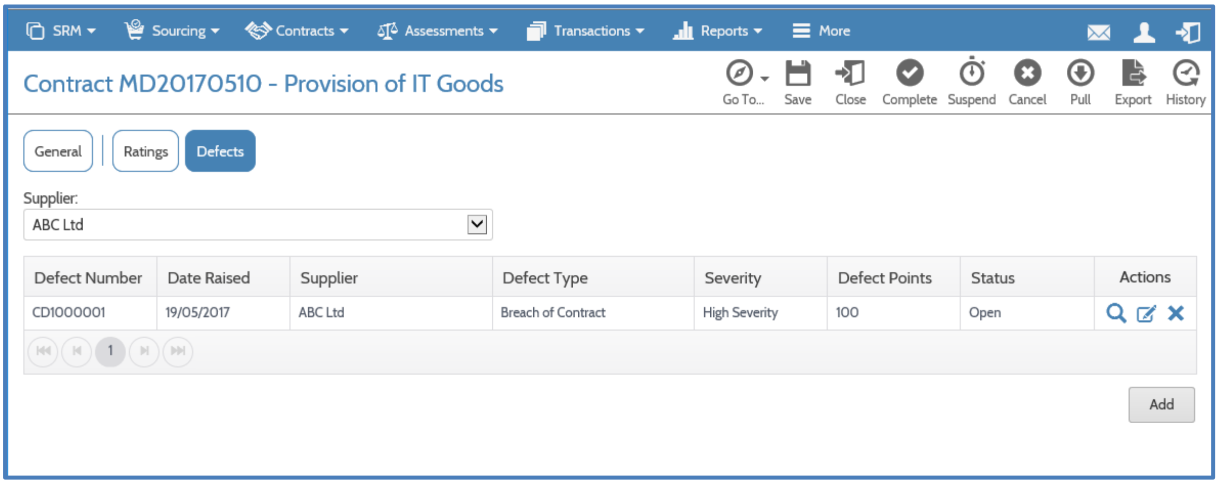
To Add a new defect, click on the **Add** button. The following pop-up dialog will be displayed…



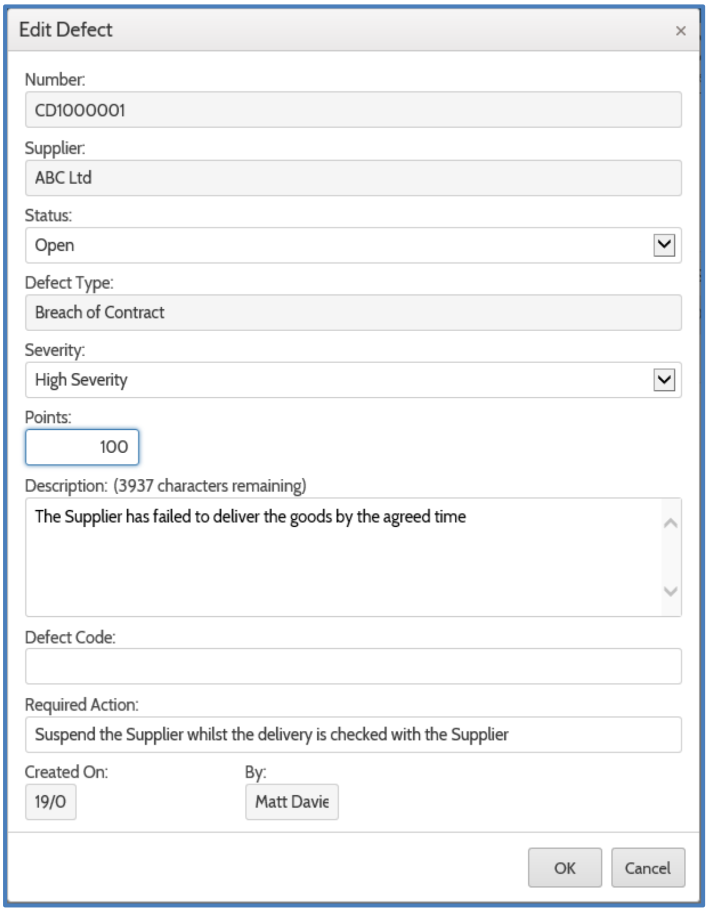
- Select the Supplier from the drop-down list
- Select the Defect Type from the drop-down list
- Select the Severity from the drop-down list (the associated points/value) will be populated based on this. The Points can be over-written from the default set in the Configuration of the Module. **NOTE**: 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…



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



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

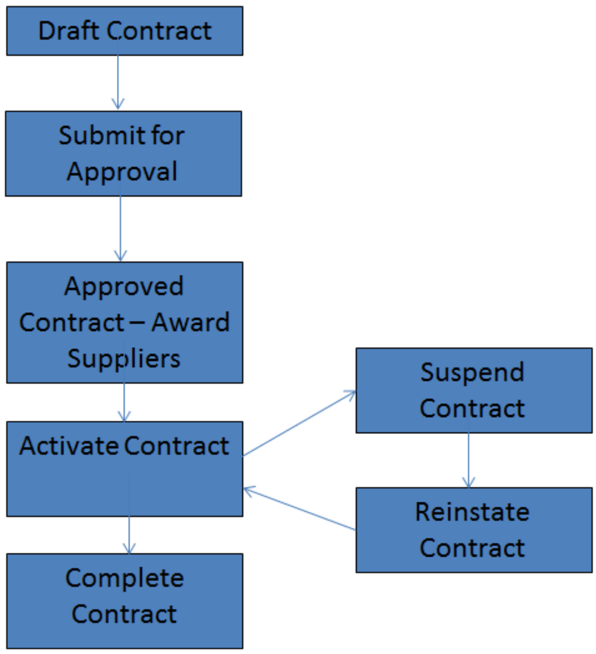
5.8.17 Custom Tabs/Reference Fields on a Contract

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.

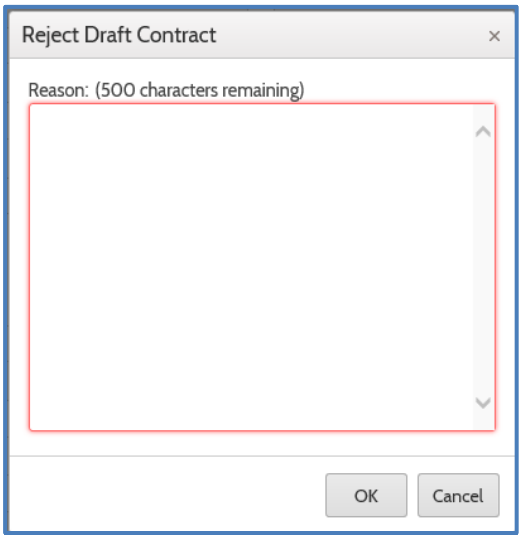
6.2 Approving a Contract

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

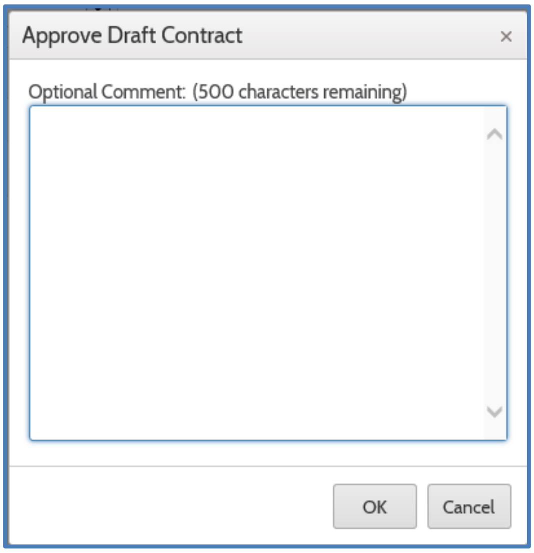
If a Draft Contract is accessed and the Submit button on the Toolbar is selected, the Contract will be sent for approval. Those users who have the relevant permission to approve a contract will be able to mark the contract as Approved. Note when the Contract is submitted for Approval, there will be a 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 …



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

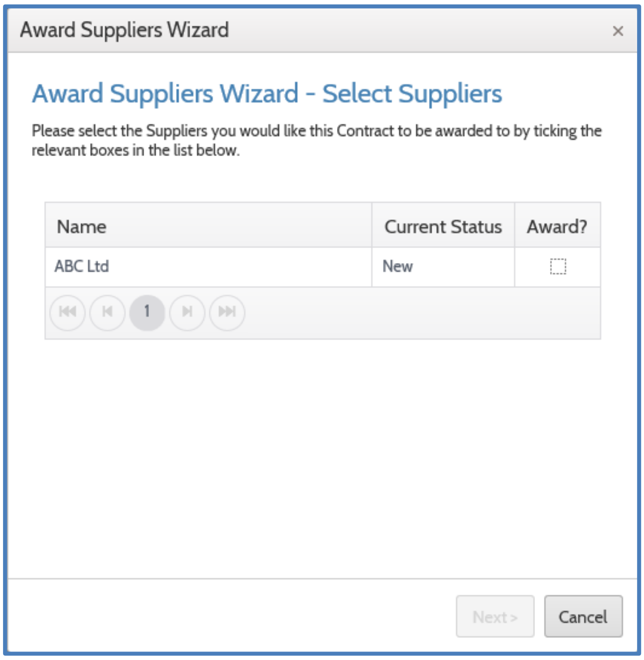


6.3 Awarding a Contract

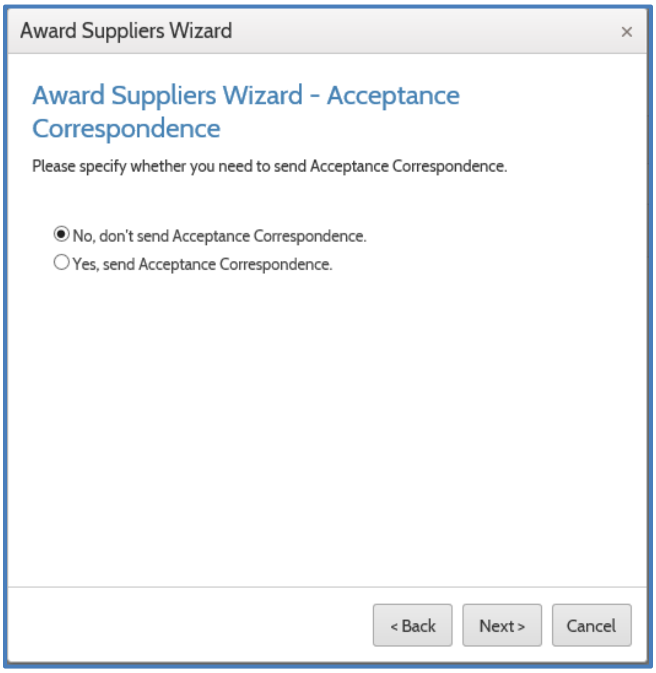
The "Award" icon is only visible within the ribbon bar if the Contract is Approved.

Open the relevant Contract to be awarded and click on the 

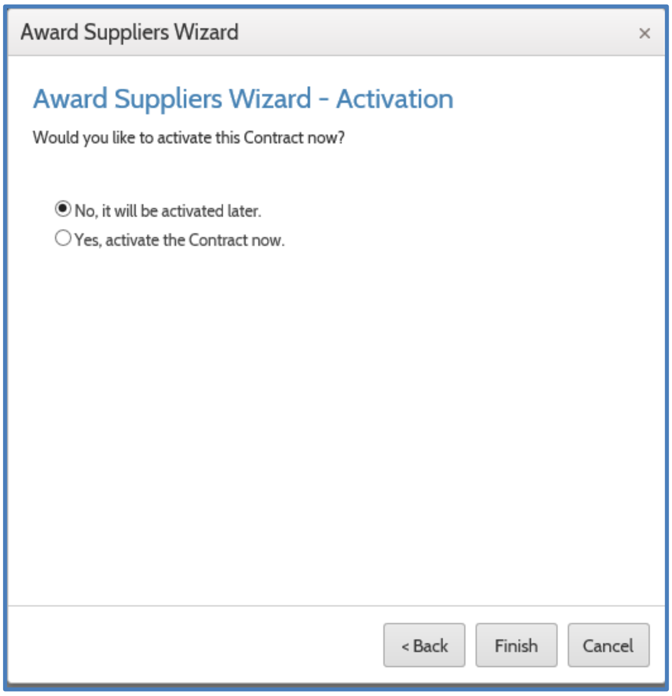
Toolbar button. An Award Suppliers wizard will display:



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.



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**



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

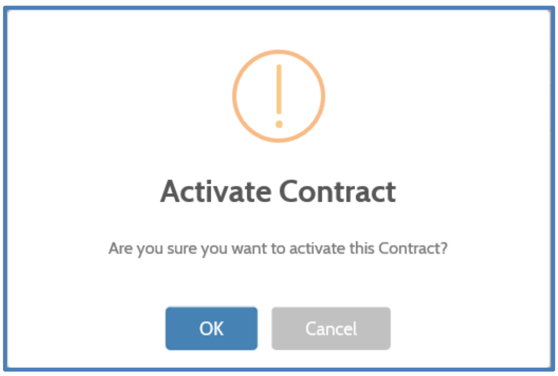
6.4 Activating a Contract

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 

on the Toolbar. A pop-up dialog will appear:



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

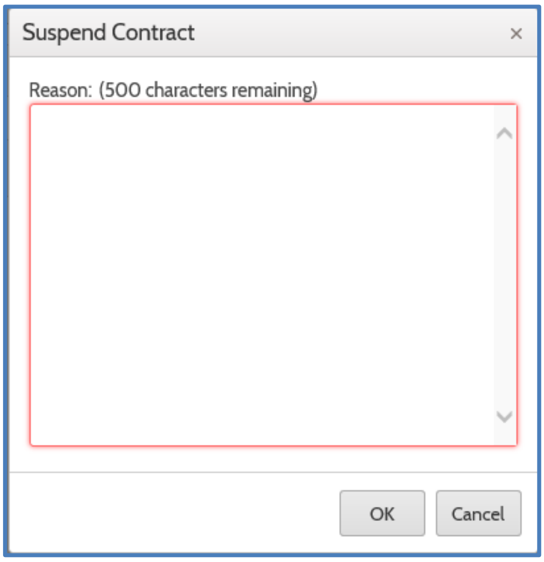
External Code set. As such there is a warning if one item or more has not been set with the required External Code

6.5 Suspending/Re-instating a Contract

You can only suspend contracts with a status of Active.

Go into the Approved Contract and select 

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 

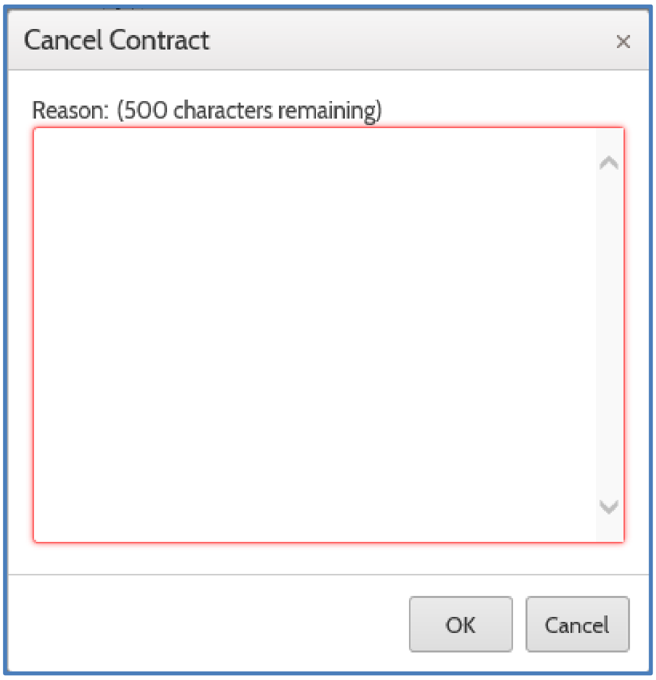
from the Toolbar. A pop-up dialog will appear:

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  Toolbar button. A pop-up dialog will open to insert comments as below …



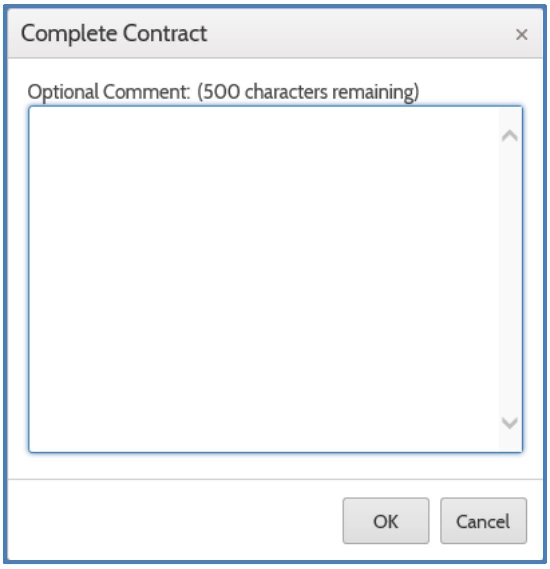
Click **OK**

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  from the Toolbar. A pop-up dialog will appear:

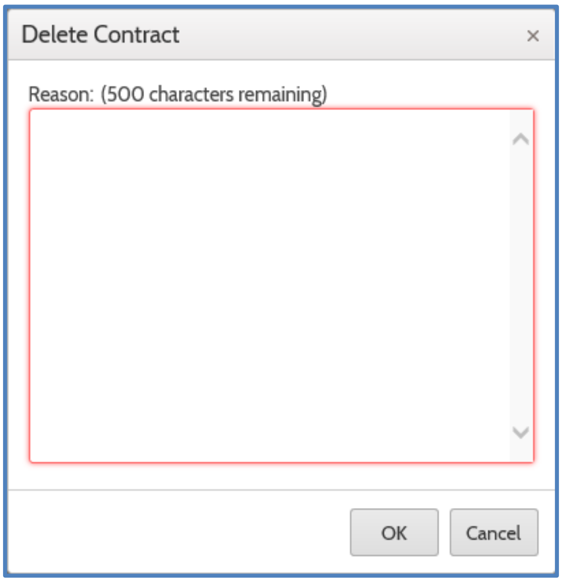


Provide a Comment if required and click **OK**. The Contract End date will be set to today's date at this point. If a Contract has been "Completed" by mistake it can be Activated again.

6.8 Deleting a Contract

Open the relevant Contract to be deleted and click on the 

Toolbar button. NOTE: Activated Contracts cannot be Deleted. A pop-up dialog will open to insert comments as below…

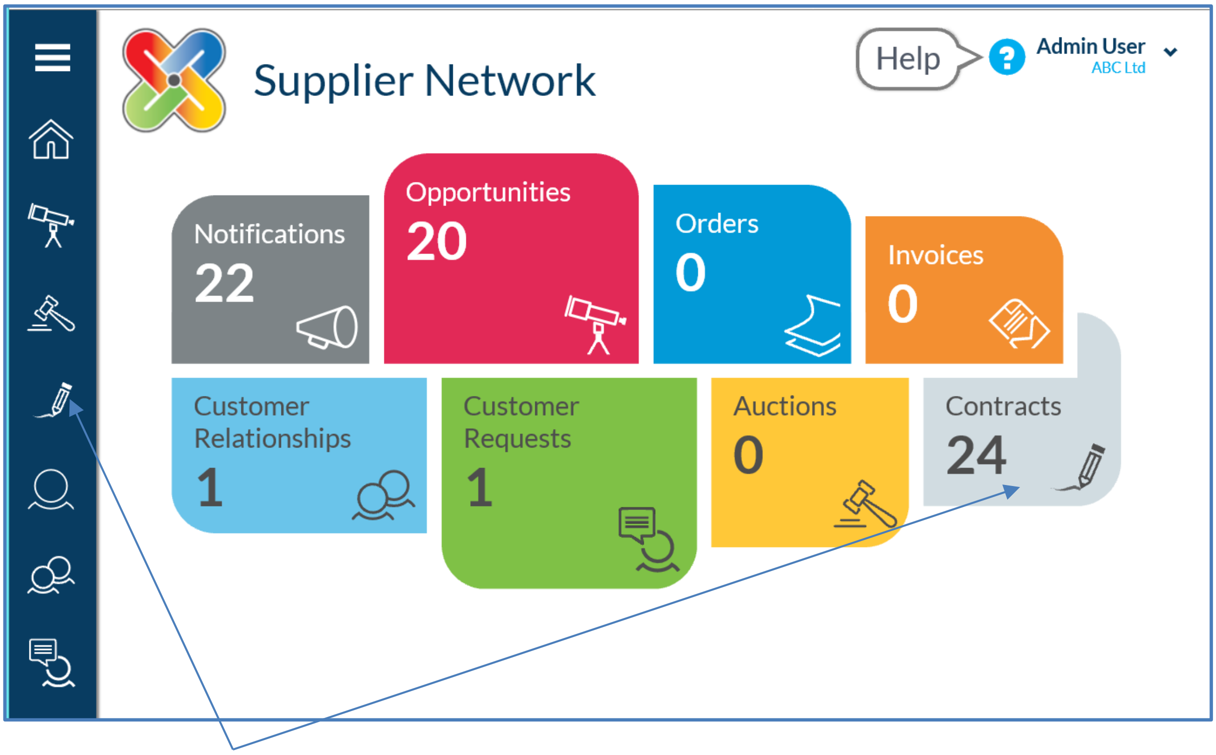


Click **OK**

7 Contract Management in the Supplier Network

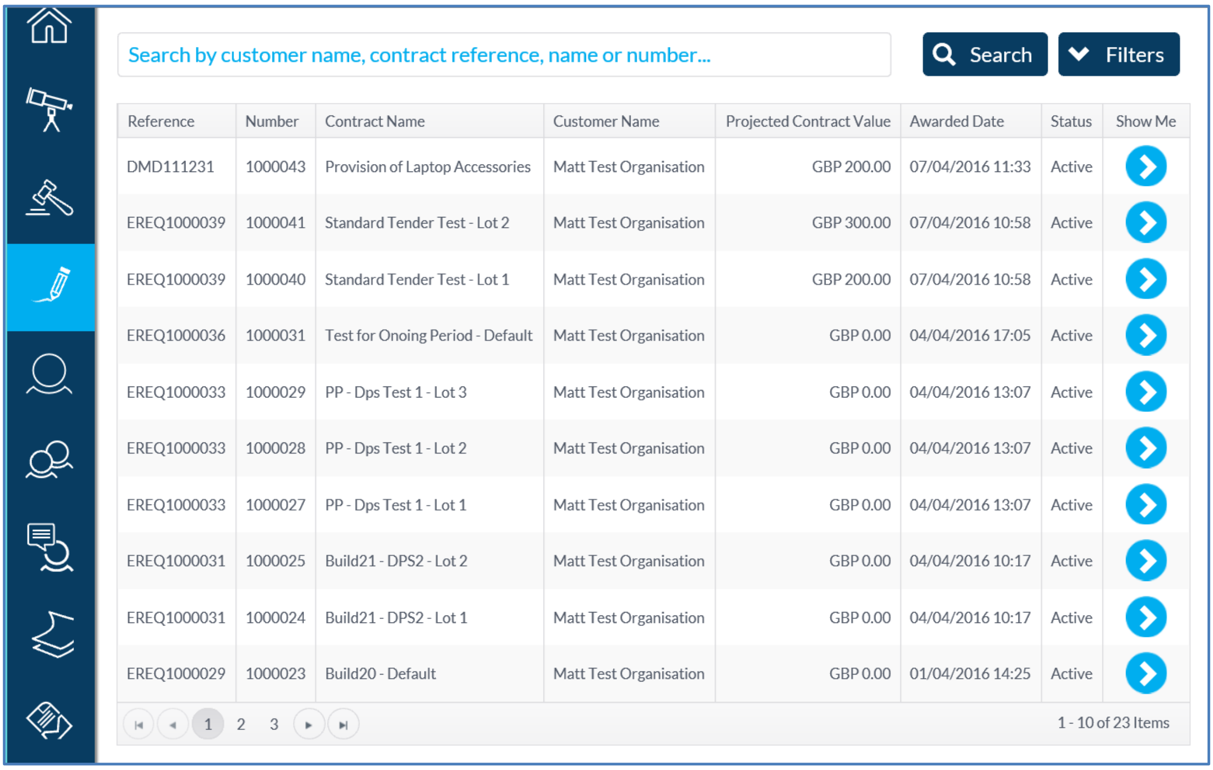
The Contract Management Module interacts with the PROACTIS Supplier Network. Registered Suppliers can view active contracts that they are associated with.

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

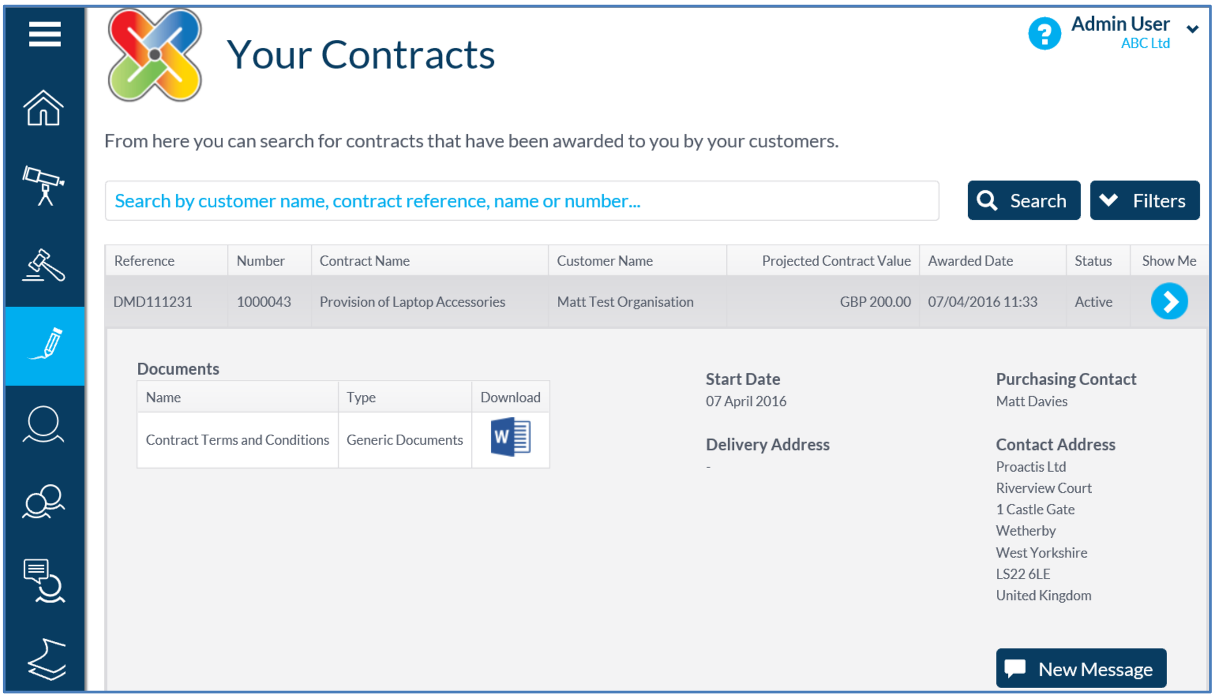


Notice the **Contracts** options

Accessing the Contracts area displays the following…

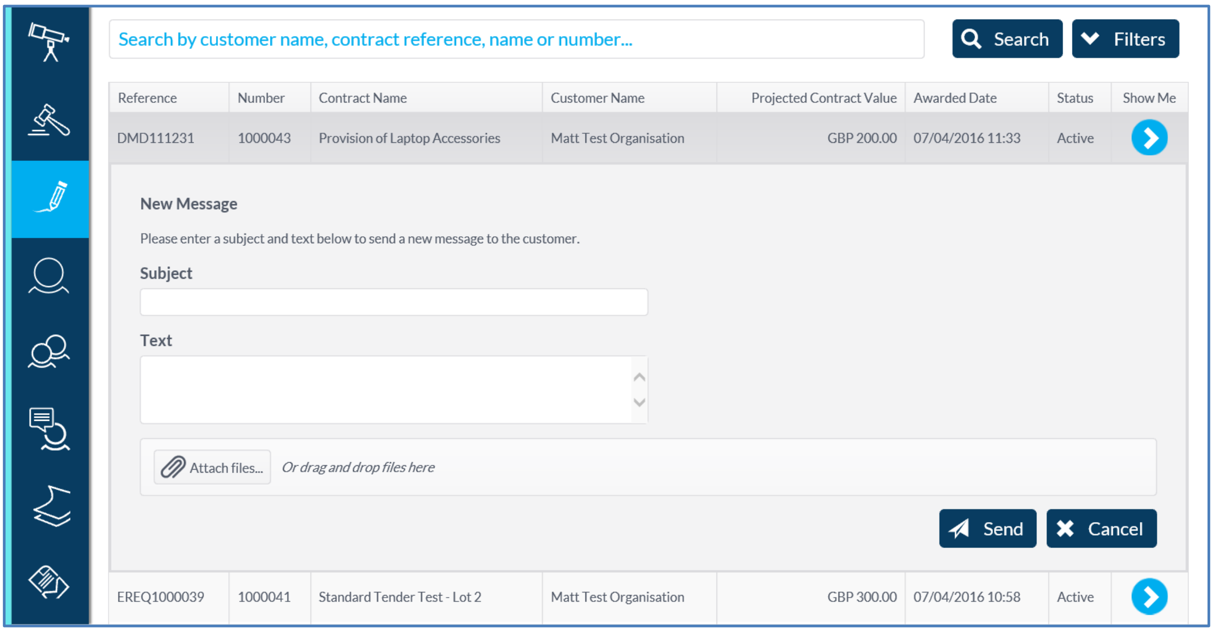


Using the "Show Me" link displays the following…



NOTE: Only Shared Documents will be displayed here

The "New Message" button will allow Suppliers to generate a Dialogue with the Buying Organisation:


Search by customer name, contract reference, name or number...
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