Summary of Contract Management System Tabs & Functions

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Tabs	Contents/Function
Overview	
General	Basic contract data, viewable to all unless the contract access rule is set to deny under 'Division'
Additional Data	Contains data for Procurement's reporting
Suppliers	Any supplier under the contract should be added here. Allows for multiple suppliers to be added
Supplier Data	Basic supplier contact data
Lots	Where a contract contains multiple types of product or service, these are bundled together into ''Lots'. Each Lot should be added under this tab
Items	A contract may contain multiple items within Lots, which can be listed under this tab. Alternatively the contract may only contain a singular item, which can also be listed here
Classifications	Classifications are industry recognised codes to represent goods or services. The goods or services under the contract should be added here using the most relevant category code

Associated Contracts	This tab should be used to associate relevant contracts, I.e. where a supplier has other contracts with the university, or where other contacts are relevant to the same project, such as a contract for a building construction project may rhequire a utility provider under a separate contract to be given notice to switch on the electric billing.
Contact Information	The first internal point of contact for the contract. This tab is viewable to all. This should contain the contact information for the Contract Manager
Administration Tabs	**Contents/Function**
Divisions	This tab allows access to either a template, or **a contract,** to be restricted, or made available, to individuals or groups. It can allow the University to hide certain contracts or Templates, so even their basic information does not appear to Users of the module, unless they are invited to view under this tab. i.e. 'Set access to Deny' makes a contract invisible to everyone. 'Set to allow' makes the basic contract data visible to all, but only at the level their User Role permissions allows them
Notes	This section can be used to make pertinent notes around the contracts management and performance, that are then time-stamped by the system. It is a useful way to keep track of 'to-do' lists, and leave a record for others to understand the agreement - i.e. at contract handover
Documents	Signed contracts, and any other pertinent or useful documentation, such as warranties, escalation hierarchies, or extracts from schedules, should be attached in this section
Tasks	Tasks can be set to send reminders to both email and the home page of the User's account. Reminders can relate to expiring contracts, upcoming meetings, etc, and can be set to remind multiple users. Tasks can also be used to prompt users to carry out an action, such as holding a performance review if the supplier's performance score (under Defects) hits a set level.
Configuration Tabs	**Contents/Function**

Roles	Roles decide the Users access permissions, i.e. which contracts they can view, and whether they can edit. Each School/Division contains both a Contract Manager Role (read & edit all within their school/division), and a Read-Only role. **OCG have a special role, which allows then to read and edit all contracts. This is unique to OCG.**
Financial Tabs	**Contents/Function**
Variations	When a contract variation takes place (extension, change to value, or terms), it can be logged under this section of the system.
Relations Tabs	**Contents/Function**
Correspondence	Pertinent correspondence can be sent to an email address using the system. The supplier's response does not come into the system, for this the user should use Dialogues.
Dialogues	Conversations can be had with the suppliers through the system. This differs from Correspondence in that it allows the supplier to respond directly into the system.
Performance Tabs	**Contents/Function**
Defects	Complaints and issues relating to goods and services can be recorded here, with points allocated based on the level of impact. A limit can be set, i.e. 180 defect points logged, and a Tasks created so that an email alert is sent when the limit is reached.
Ratings	Surveys can be built in the system, containing automated scoring based on answers to questions. The survey can be sent to users of the goods or services under contracts, allowing the Contract Managers to gather data around performance and satisfaction. The survey can also be sent to suppliers for feedback on its experience with the University.