CONTRACT ADVANTAGE™ WEB

Version 6.0

Requisition Portal Business User Guide

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Introduction

Using *CONTRACT ADVANTAGE™ WEB,* there are many ways to start the contracting process. From an enterprise perspective, the best approach is to engage the organization's staff directly in the process. After all, contracts begin with staff, managers and executives in the business and operating units based on a business need.

The **Requisition Portal** is a web portal that can be linked into the organization's internal website and integrates with **Contract Advantage Web.** Thus, any user with a valid login ID to the organization's network can access the **Requisition Portal**.

The **Requisition Portal** can be used to initiate the contracting process for the procurement of goods and services. The portal formalizes and automates the process getting a contract into the legal services, contract management or procurement work stream. As a process management tool, the **Requisition Portal** lets any user in the organization submit a request to have resources engaged to "make it happen". Different organizations will have different approaches as to how this actually accomplished. The portal provides flexibility between automated and manual systems to ensure that there is adequate communications between the requestor and the legal and contracting specialists in the organization.

The Process

The typical process is as follows: The business user who wants to start the contracting process logs into the Requisition Portal, and Adds a New Contract Requisition by completing the Requisition Form. The Requisition Form is used to define the who, what, when, why and "how much" of the contract. The graphic below (Fig. 1) will take you through the entire process.

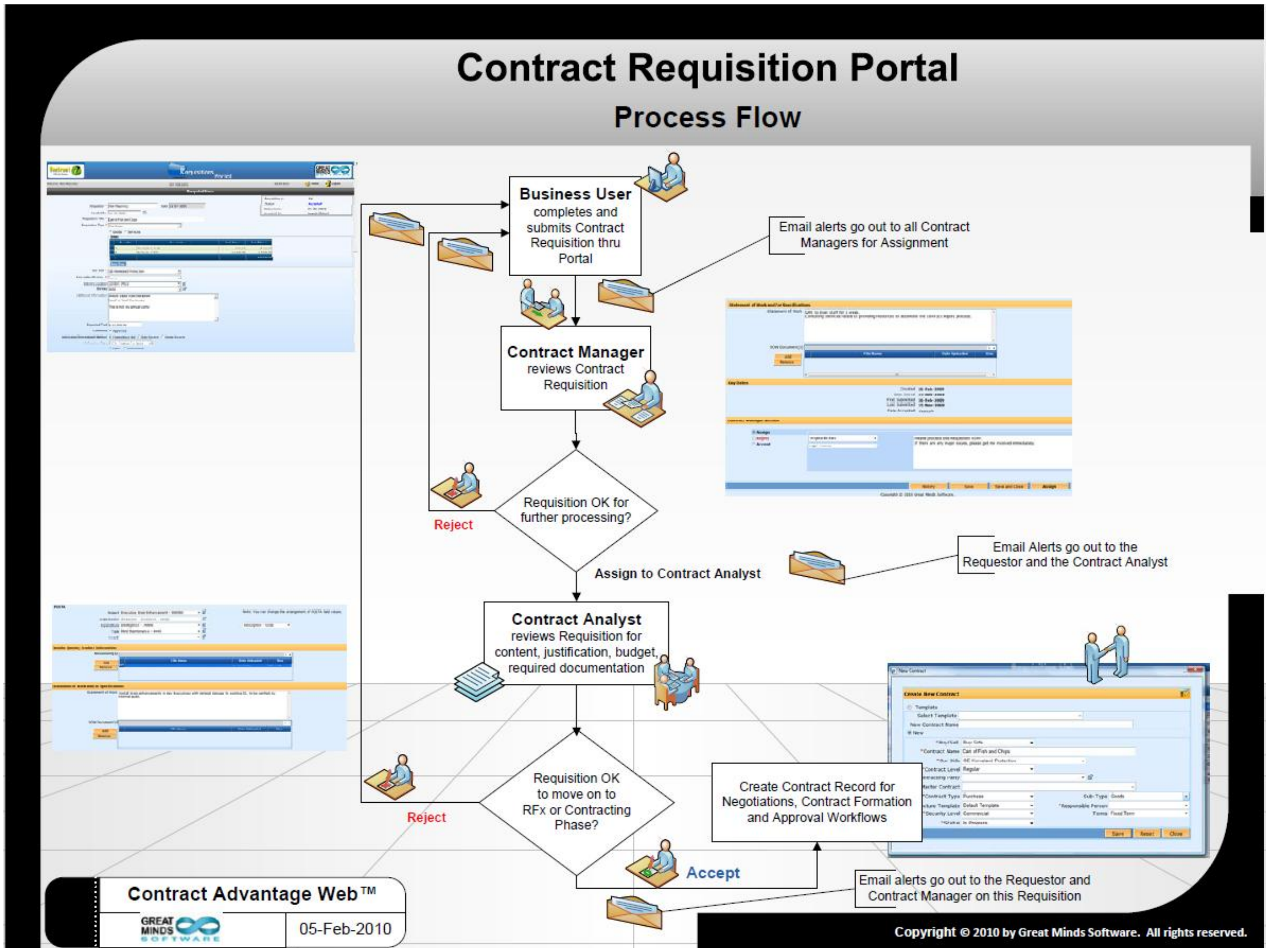

Figure 1

Logging In

There is no limit on the number of users that may utilize the **Requisitions Portal**. As long as the person is in your Active Directory, the user simply logs in as he or she would on your network. The Login Screen (Fig. 2) authenticates the users against the Active Directory, thus preventing any unauthorized use. Normally, the Login screen will not require you to enter a DB Code. This will only activate if your company is using multiple databases.

Contract Managers and Contract Analysts are designated in **Contract Advantage™** and all Security settings are also established in **Contract Advantage** by the System Administrator. Instructions on establishing these settings can be found in the *Requisition Portal Administrator Guide.*

Figure 2

Home Screen

The **Home Screen** will allow users to see "**My Requisitions**," **Modify** them and create **New Requisitions** (Fig. 3). As with **Contract Advantage™**, the Requisitions Portal has **Excel** buttons available, so users can export data to an Excel spreadsheet with ease.

Figure 3

A Requisition can be created by any Requisition Portal User on your Active Directory. To create a new Requisition, simply click on the **New Requisition** button at the bottom of the screen (Fig. 3). The New Requisition Form will appear (Fig. 5). The Settings buttton will let you establish your default settings (Fig. 4).

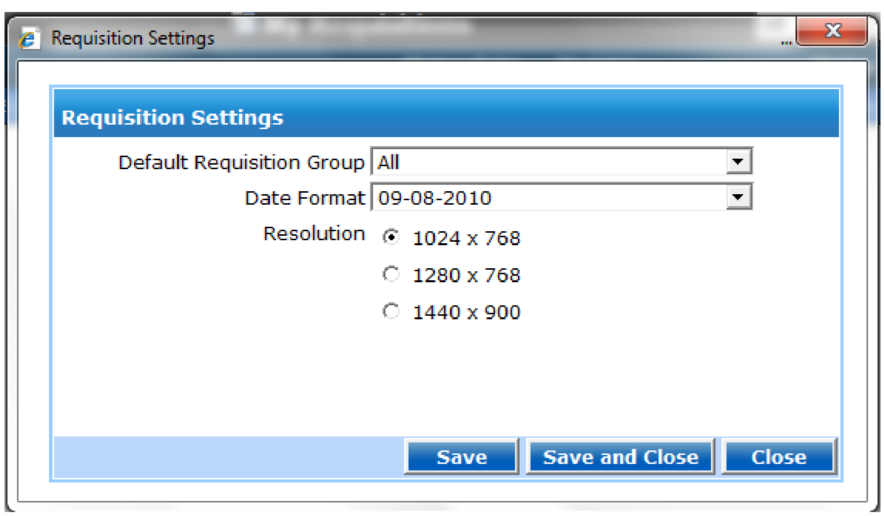

Figure 4

You will be able to set your Default Requisition Group; your Date Format and the desired Resolution for your PC by making selections as appropriate.

Alerts and News

In addition to users seeing “My Requisitions” and being able to access the appropriate Links on the Home Screen, the Administrator will be able to post **Alerts** and **News** to the left area of this window and designate when the Alerts and News should no longer be displayed.   Mousing over an item will display the details (Fig. 3)

New Requisition

Below is a full-page sample Requisition screen (Fig. 5). Following, the various areas are broken out.

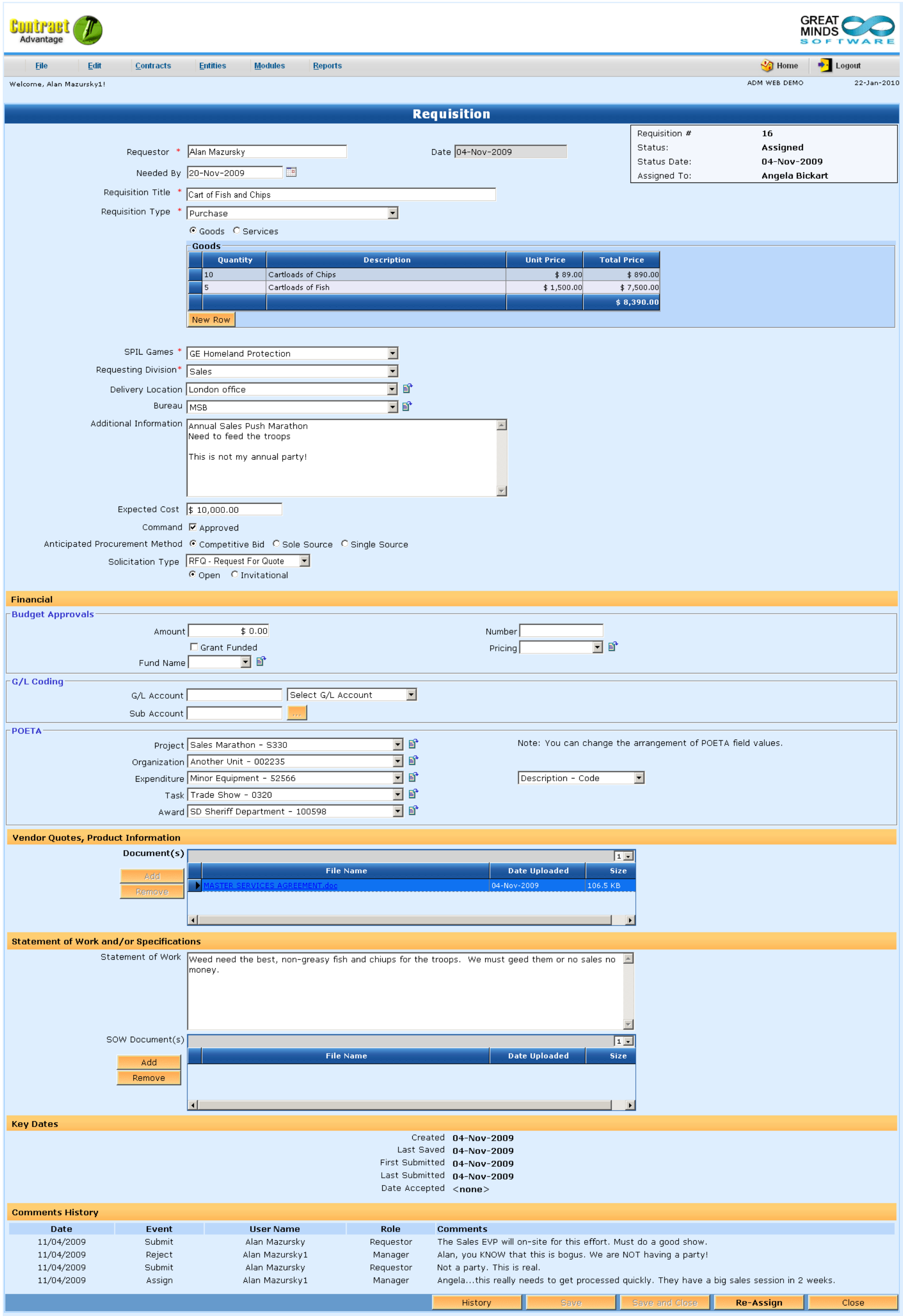

Figure 5

The top potion of the New Requisition form will allow you to enter all pertinent information about your request (Fig. 6). The mandatory fields are identified with a red asterisk. You will be able to select the appropriate entries from a dropdown menu in many cases. In other instances, you will be able to type the information in. Clicking on the **Goods** or **Services** radio button, will activate the grid shown below. The information you will have to fill in will be determined by the **Requisition** Type selected from the dropdown. The Administrator will set up **Requisition Type Structure Templates** to suit company needs.

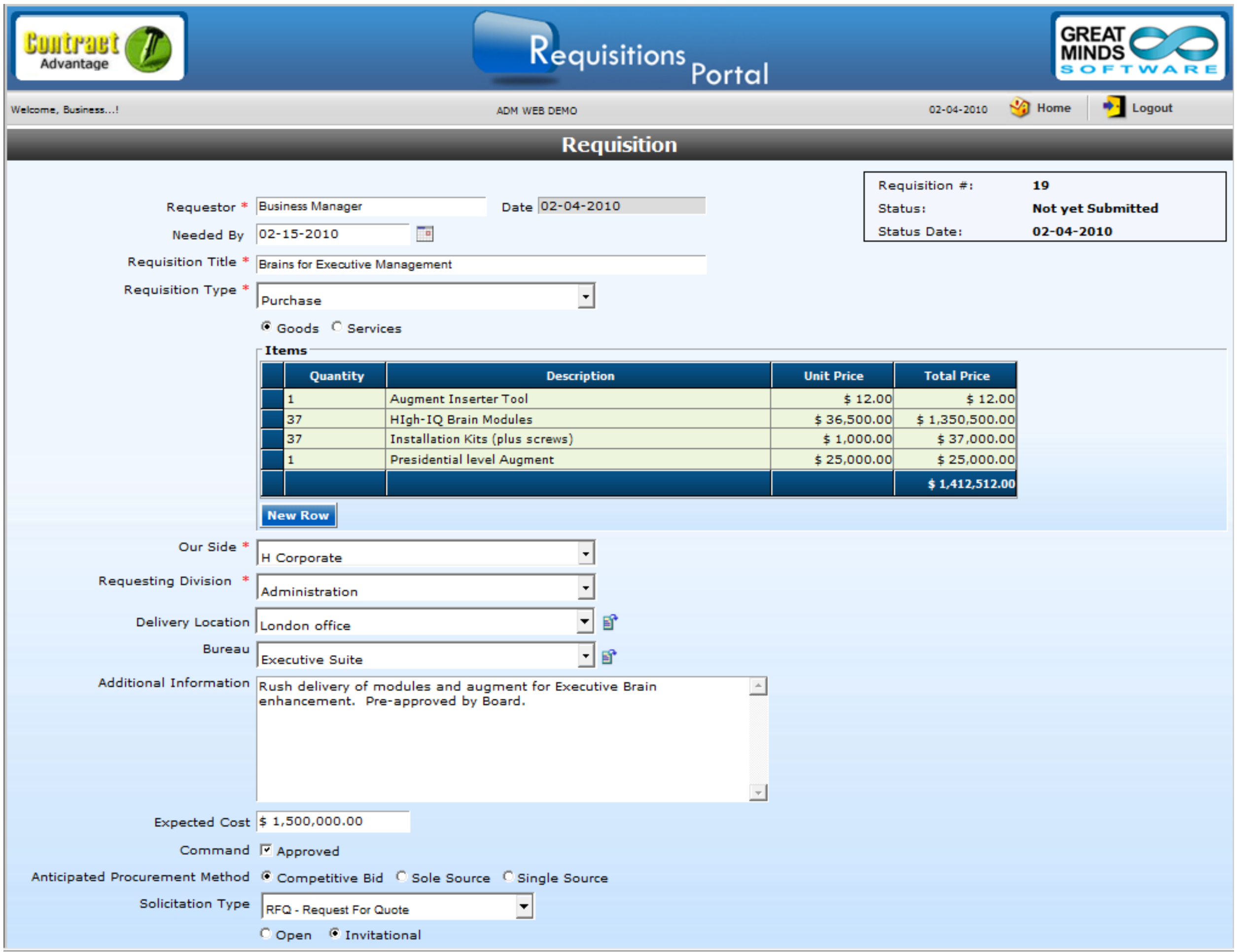

Figure 6

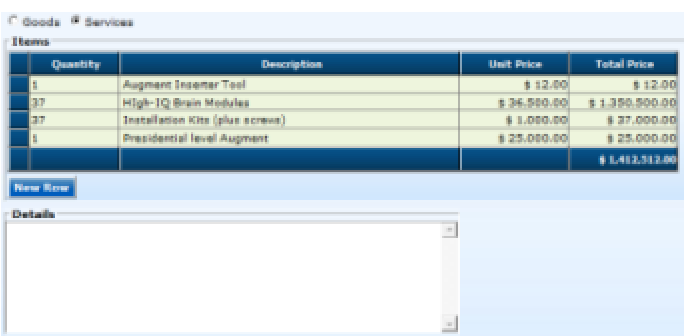

Figure 7

The **Services** radio button will display the **Details** memo section in addition to the grid (Fig. 6). This is an ample memo field. It permits you to enter the details of the services requested (Fig. 7). The **New Row** button will insert a new data row for you in the **Goods** area (Fig. 7). You will also be allowed to attach a descriptive document(s), as appropriate, to your Requisition (Fig. 10).

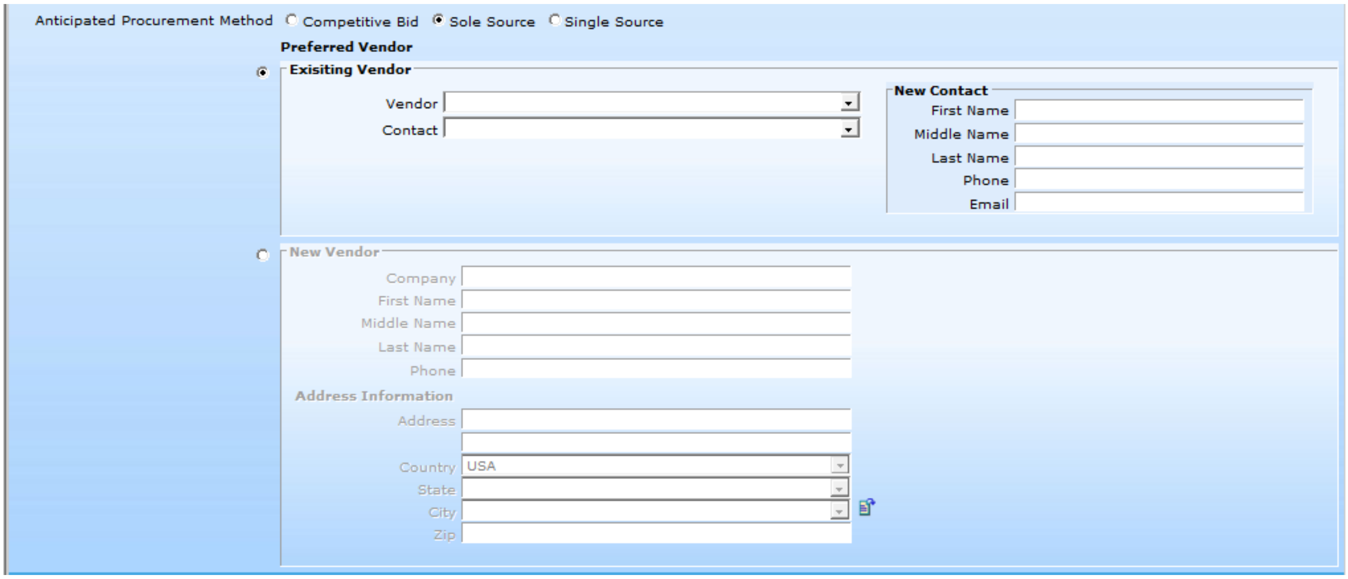

Figure 8

Clicking on the **Sole Source** or **Single Source** radio buttons (Fig 8) will permit you to enter all appropriate Vendor information. You will be able to select from an **Existing Vendor** or enter a New **Vendor** by clicking on the corresponding radio buttons.

The **Financial** area (Fig. 9) will allow you to enter the financial details of your request. Your System Administrator will set which fields will display here based on your organizational requirements. The Contract Manager may be able to fill in some of this information for you. This will depend on your company's protocols. There are lots of **(Quick Add)** buttons throughout the form to permit you to add items that may be missing from the menus.

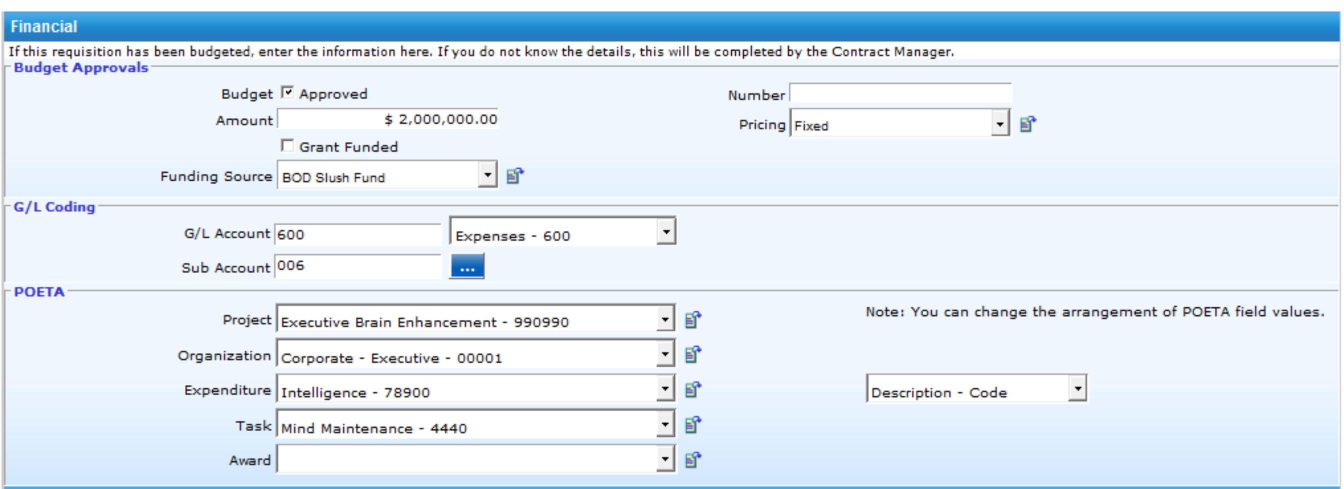

Figure 9

The **Vendor Quotes, Product Information** area is designed to permit you to Add or Remove as many documents as you require. The **Statement of Work and/or Specifications** area will allow you to type in any relevant information and **Add** or **Remove** SOW Documents. The **Comments** area is an ample memo field where you can type information also. See Fig. 10.

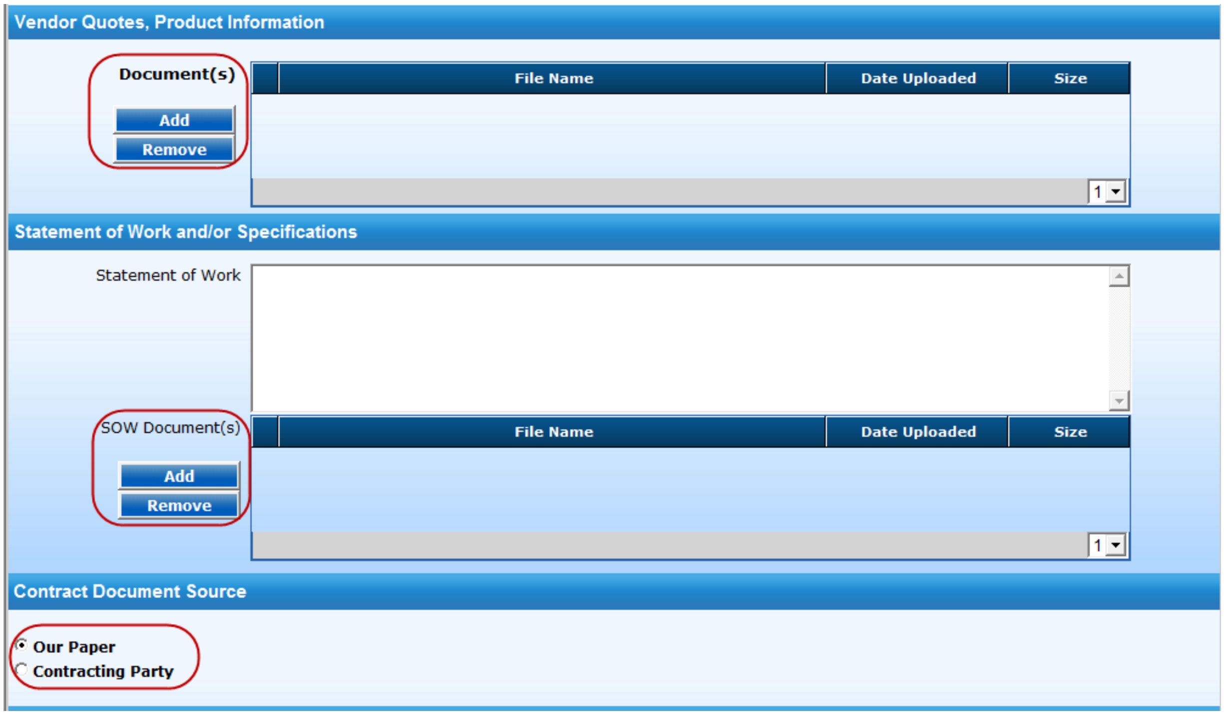

Figure 10

You will be able to attach as many documents as are needed to three different areas:

- Vendor Quotes, Product Information
- Statement of Work and/or Specifications
- Contract Document Source

When you click on the **Contracting Party** radio button, this panel expands to allow you to attach outside paper (Fig. 10 and Fig. 11).

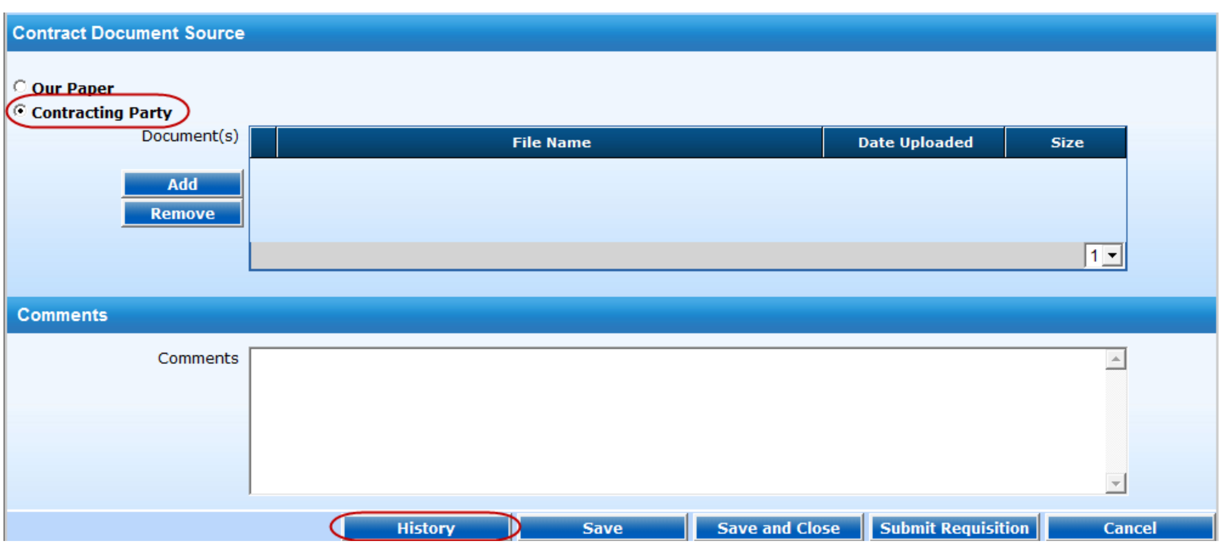

Figure 11

Comments can be entered in the **Comments** box and clicking on the **History** button (Fig. 11) will display historical data (Fig. 12).

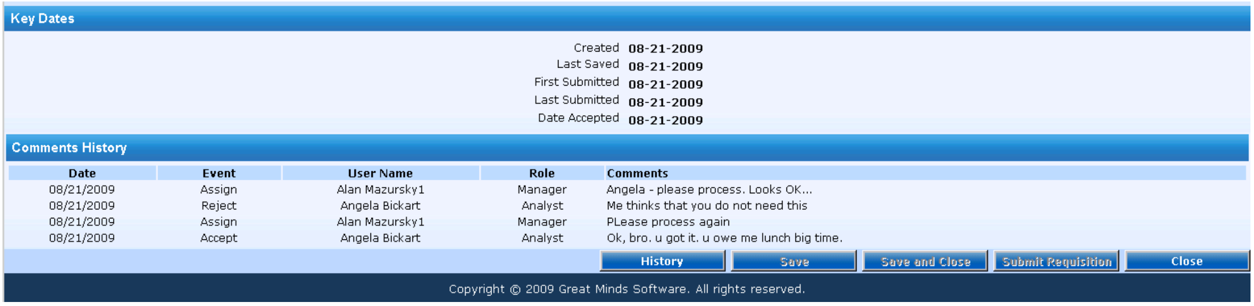

Figure 12

Key Dates for this Requisition are displayed at the bottom of the form together with a **Comments History** (Fig. 12).

Click on **Save** or **Save and Close** to save your Requisition ***without submitting it***.

Click on **Submit Requisition** when your data is complete.

Click on **Cancel** to abort.

Clicking on the **History** button will display the History for this particular Requisition (Fig 13).

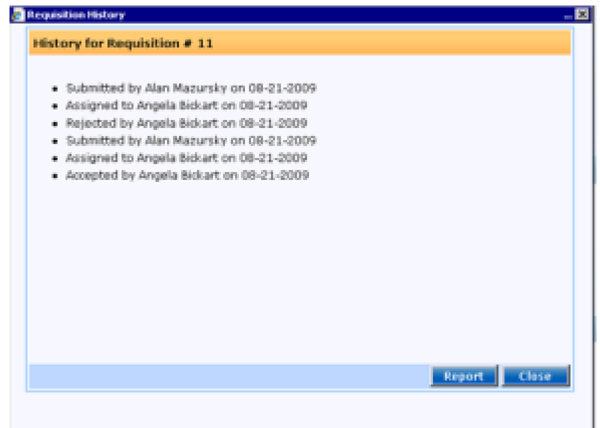

Figure 13

My Requisitions

Once you click on **Submit Requisition** (Fig. 12), the system proceeds to notify the Contract Manager(s) via email, and the advice below will show (Fig. 14).

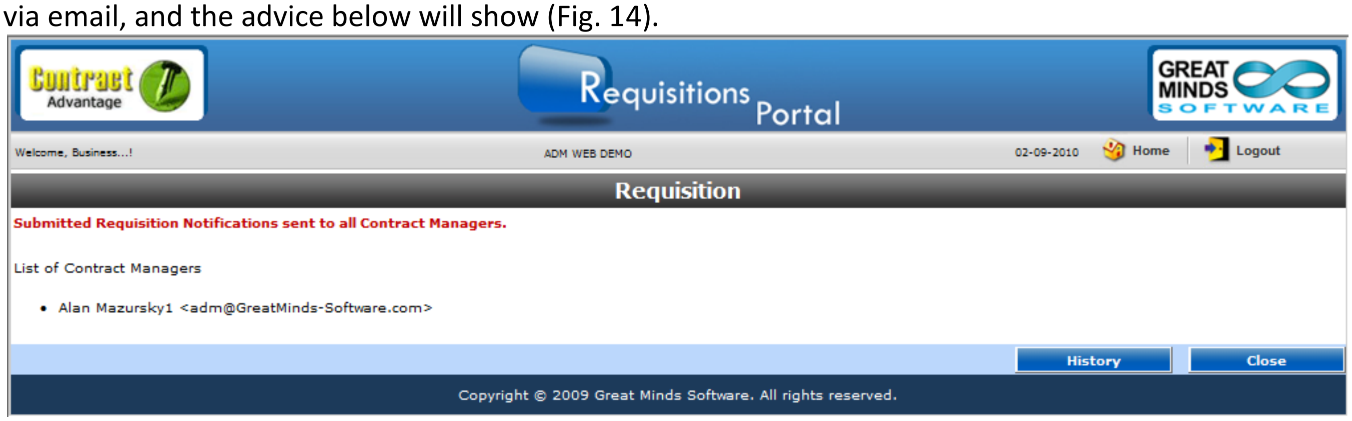

Figure 14

Clicking on **History** above will display the **Requisition History** (This may not be the first time this request has been made). Clicking on **Close** will bring you back to the **My Requisitions** screen (Fig. 15).

Figure 15

On the **My Requisitions** screen you will be able to see all your **Requisitions by Group**:

- All
- Accepted
- Cancelled
- Not yet Submitted
- Pending
- Rejected
- Submitted

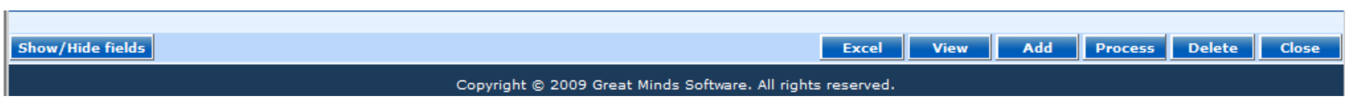

Figure 16

- The **Show/Hide Fields** button will allow you to tailor the screen to show the fields you are interested in seeing.
- The **Excel** button will export the data displayed to an MS Excel spreadsheet.
- The **View** button will permit you to see the highlighted Requisition.
- The **Add** button lets you create a New Requisition.
- The **Process** button will activate if you have the authority to Process a Requisition.
- The **Delete** button will delete the highlighted Requisition.
- The **Close** button will bring you back to the **Home Screen**.

To customize the **My Requisitions** screen (Fig. 15):

1- Click on the **Show/Hide Fields** button at the bottom of the screen (Fig. 15). The **Requisition Grid Columns** screen opens (Fig. 17).
2- Select the Fields you wish to display by clicking on the **Visible** column checkboxes.
3- You will be able to change the display order by highlighting the desired field and clicking on the **Up** or **Down** button. The field will move to the desired position.

When you return to the **My Requisitions** screen, the fields you have indicated will display in the order you have designated.

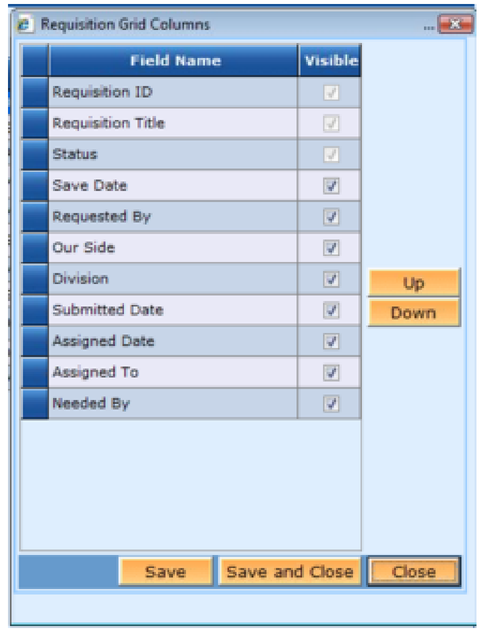

Figure 17

Figure 18

Once you have placed some Requisitions, the **Home Screen** will display them for you immediately when you log in. You will always be able to see the status of your Requisition. You will be able to again see the Requisitions by **Group** (Fig. 18). The **Links** button takes you directly to the appropriate items:

- New Requisition
- Saved, Not Submitted
- Submitted
- Pending Approval
- Accepted
- Rejected to be Resubmitted

Roles and Procedures

There are three roles involved in the Requisition Process as shown in Fig. 1:

- **Business User** – Any person on your Active Directory that wishes to place a Requisition for goods and/or services.
- **Contract Manager** – The individuals designated to receive the Requisition once submitted for routing to the Contract Analyst(s) for processing.
- **Contract Analyst** – The persons assigned responsibility by the Contract Manager to process the Requisition as appropriate.

The System Administrator will identify Contract Managers and Analysts. This will be explained in the *Requisition Portal Administrator Guide*.