

2011 BRINGING ADMINISTRATORS TOGETHER CONFERENCE

# Contract Management System

April 27, 2011  
11:00 a.m. – 12:15 p.m.

**UIC** UNIVERSITY OF ILLINOIS  
AT CHICAGO

*Empowering Performance & Achievement through Teamwork*

# Workshop Presenter

Francis Jatico

Director of Business Development Services

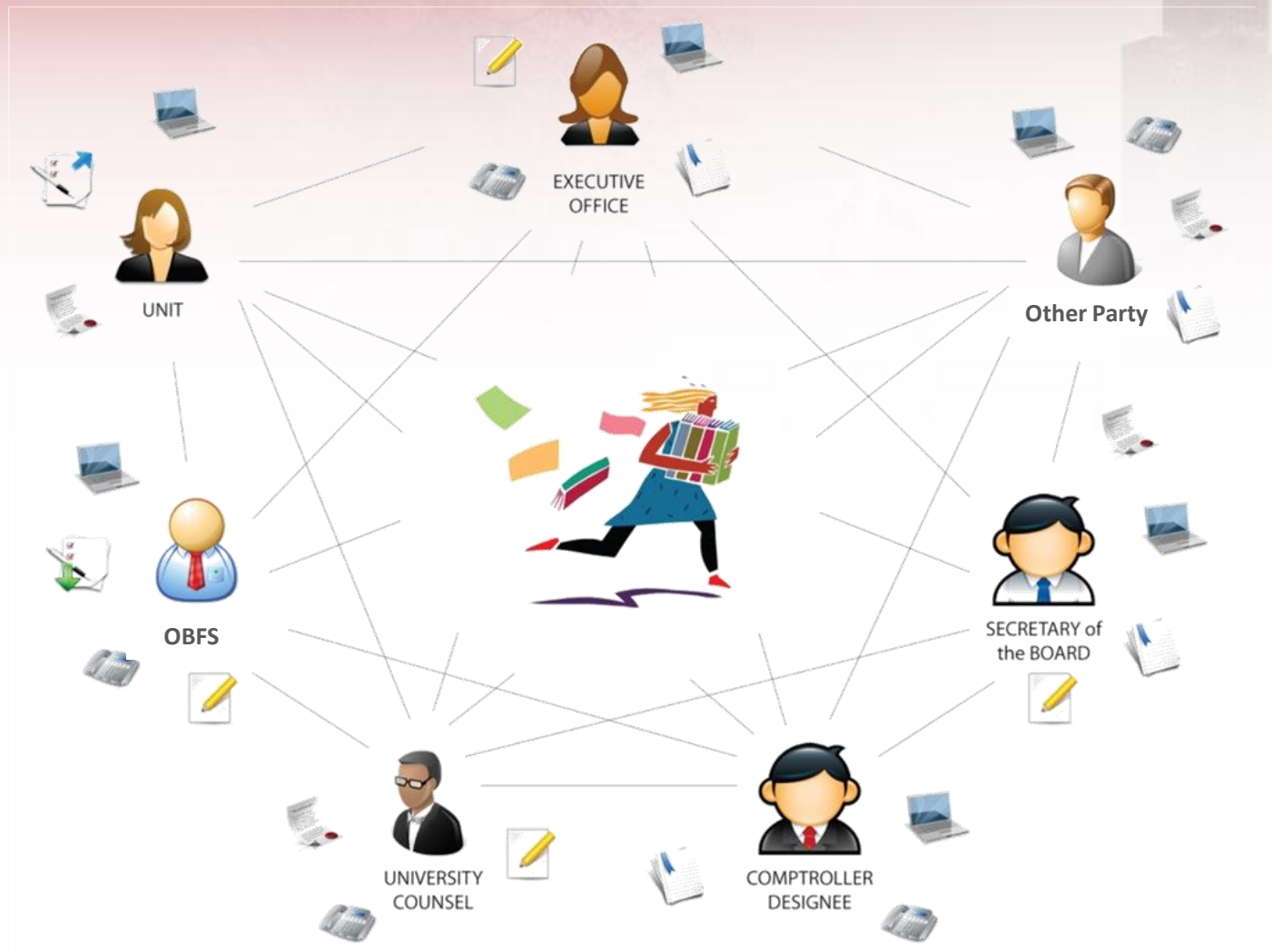
Phone: 312-355-0783

Email: [jatico1@uillinois.edu](mailto:jatico1@uillinois.edu)

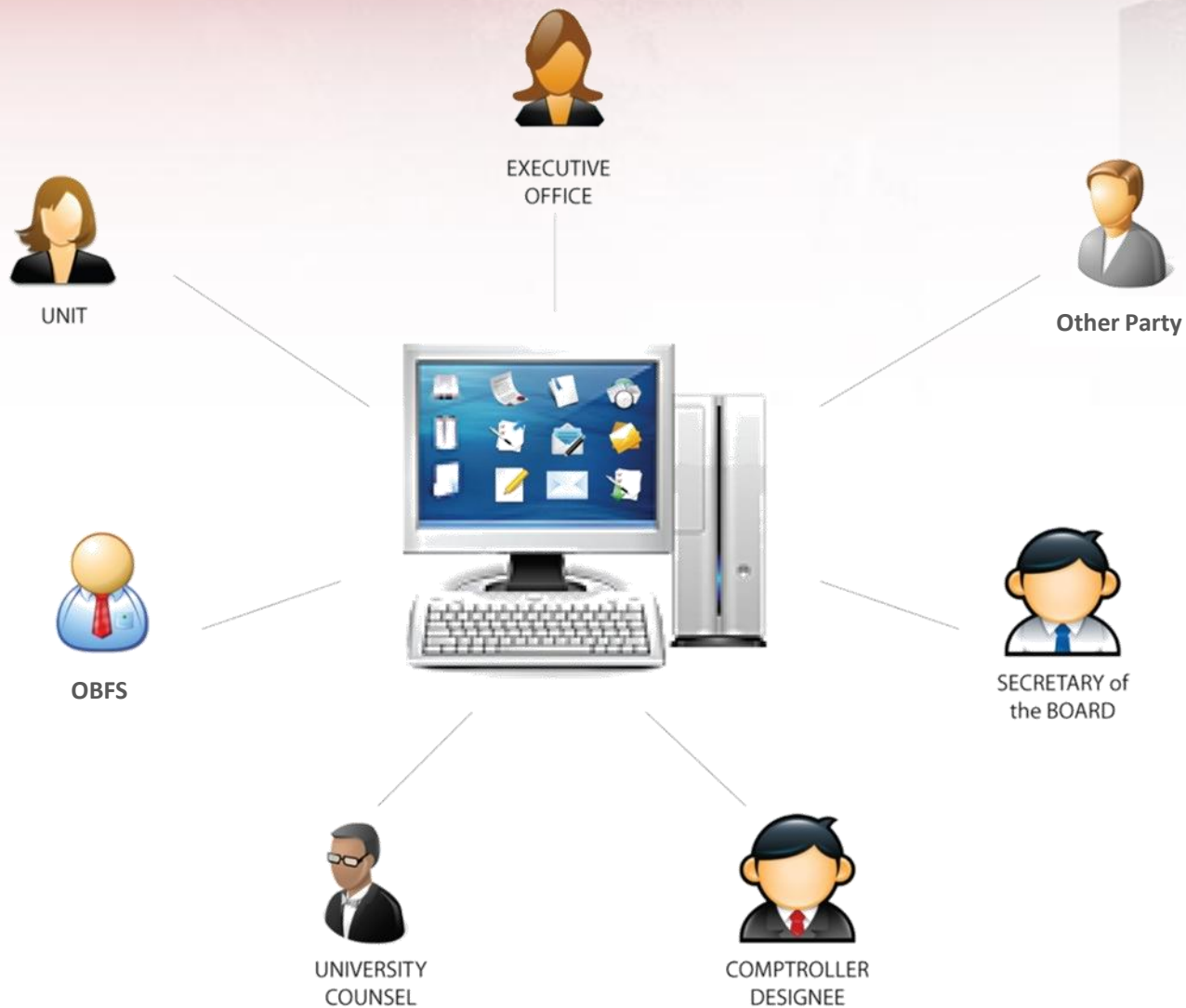
# Workshop Objectives

- Need and Benefits
- System Considerations
- System Preview
- Implementation Timeline

# NEED AND BENEFITS

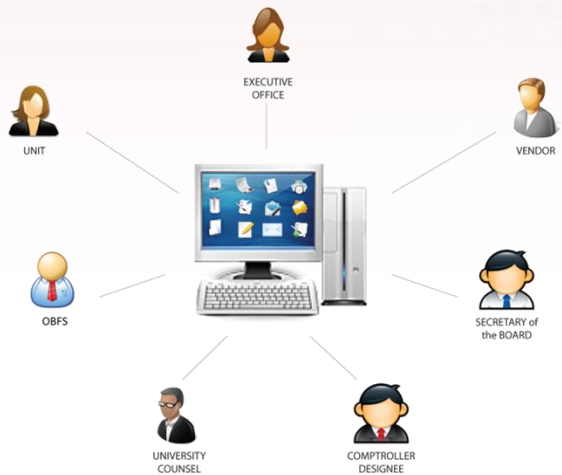


## Current Process – Paper Driven



## Electronic Process

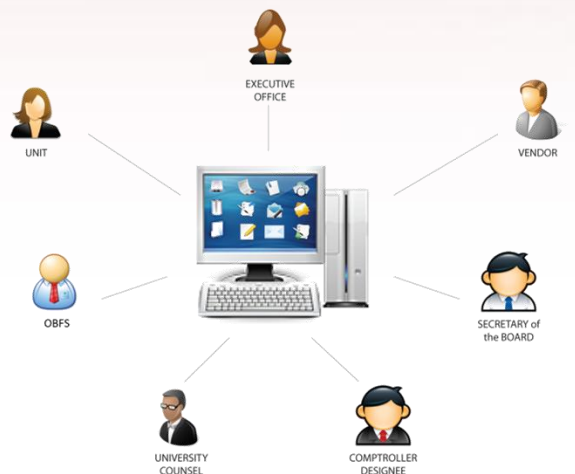
# User Benefits



- Provide one-stop solution for management of contracts
- Streamlined approval process
- Electronic routing workflow
- Elimination of multiple systems
- Easy tracking of status
- Elimination of paper copies
- Enforce University policies and procedures



# University Benefits



- Improve the efficiency of the resources that we manage
- Continually improve customer satisfaction
- Communicate effectively, internally and with others with whom we work
- Demonstrate compliance with policy, regulations, and law



# SYSTEM CONSIDERATIONS

# Contracting Process



## Initiate

- Pre-approved Templates
- New Contract Requests
- Amendment Requests
- Template Requests
- Internal Approvals

## Create

- Contract Documents
- Contract Templates
- Supporting Documentation

## Process and Negotiate

- Business, Risk and Legal Review
- Route for approvals
- Check Current Status

## Execute

- Signatures of both parties
- Submit to University Contract Office

## Manage

- Search
- Report
- Archive
- Retention
- Self-service

# Key Considerations



- User-friendly/easy-to-use
- Electronic workflow
- Central location
- Access on all campuses
- Roles/Levels of security
- University customized workflow
- Vendor compliance and performance tracking
- Tracking of changes
- Tracking, Searching, Reporting, and Querying
- Email system alerts and reminders

# Training

Web-based

Overview



Policy and Procedures

Simulation by Roles

# Knowledge/Skills

## Knowledge

- Policies and procedures
- Legislation
- Purchasing process for all campuses
- Contracting process for all campuses

## Skills

- Generate reports
- Request system access
- MS Office Products
- Adobe Acrobat
- Web-based products
- Basic computer skills
- Email/attachments
- Scan

# SYSTEM PREVIEW

# Login Screen



The screenshot shows a login interface for 'prodagio|contract'. The interface is enclosed in a blue border. At the top right, the text 'prodagio|contract' is displayed, with 'prodagio' in black and 'contract' in purple. Below this, there are three input fields: 'User Name:', 'Password:', and 'Repository:'. The 'Repository:' field is a dropdown menu currently showing 'CONTRACT\_DEV'. Below the 'Repository:' field is a checkbox labeled 'Remember my credentials'. At the bottom left, there is a link '[+] More Options'. At the bottom right, there is a 'Login' button. A small circular icon with a question mark is located at the bottom left of the blue border.

prodagio|contract

User Name:

Password:

Repository:

☐ Remember my credentials

[\[+\] More Options](#)

[?](#)



# Main Screen

1. System Links

2. Tab Row

3. View Icons

prodagio|contract

[Help](#) [Preferences](#) [Logout](#)

Personal Cabinets Reference Recent Subscriptions Favorites

Cabinet: Karen Deering

4. Folder Action Icons

5

Quick Search:

Folders

CONTRACT\_DEV  
+ Karen Deering

Karen Deering

Starts With

Items Per Page: 50 Show All Objects

Name	Document Title	Category	Date Modified	Checked Out By
Contract - Accounting - IT Consulting Inc. ( C	Mike Devocelle-first test template (T-00022 v1.6)	Payable	Feb 22, 2011	
Contract - TPDCP - Karen Deering ( CN-0007	Karen Deering First Test Template (T-00037 v1.0)	Receivable	Feb 22, 2011	
Contract - TPDCP - Party Time ( CN-00197 v	Karen Deering First Test Template (T-00037 v1.0)	Receivable	Feb 22, 2011	
Contract - TPDCP - Tasty Treats ( CN-00034	Karen Deering	Receivable	Feb 21, 2011	
CR - Payable - Karen Deering ( CR-000010 v	Contract Request (T-00011 v1.2)	Payable	Feb 22, 2011	
CR - Receivable - Tasty Treats ( CR-000008	Blank Word 97 / 2000 Document	Receivable	Feb 21, 2011	

6. Folder Structure

7. Central listing of contracts and documents

# Document Dashboard

The screenshot displays the Prodigio Contract system interface. The top navigation bar includes tabs for Personal, Cabinets, Reference, Recent, Subscriptions, and Favorites. The main content area shows a document dashboard for Karen Deering, listing various contracts and their details. A right-click context menu is open over a document, highlighting the 'Open Dashboard' option. A callout box labeled 'Right Click' points to the document, and another callout box labeled 'Action Items' points to the 'Open Dashboard' option in the menu.

**Right Click**

**Action Items**

**Open Dashboard**

**View**

**Edit**

**Check Out**

**Properties**

**Save a Local Copy**

**Email as Link**

**Start Predefined Routing**

**Start Ad Hoc Routing**

**Export to CSV**

**Assign Number**

**Add to Clipboard**

**Add to Favorites**

**Delete**

**Assign Relationship**

**View Locations**

**Subscribe to Changes**

**Contract - Accounting - IT Consulting Inc. ( C**

**Contract - TPDCP - Karen Deering ( CN-0007**

**Contract - TPDCP - Party Time ( CN-00197 v**

**Contract - TPDCP - Tasty Treats ( CN-00034**

**CR - Payable - Karen Deering ( CR-000010 v**

**CR - Receivable - Tasty Treats ( CR-000008**

**Contract Req**

**Blank Word S**

**Feb 22, 2011**

**Feb 22, 2011**

**Feb 22, 2011**

**Feb 21, 2011**

**Feb 22, 2011**

**Feb 21, 2011**

**UNIVERSITY OF ILLINOIS**  
URBANA • CHAMPAIGN • CHICAGO • SPRINGFIELD

# Document Dashboard

Document Dashboard : Contract - Electrical and Computer - Partner Co ( CN-00241 v 1.0 )

1. Available Actions

2. Jacket Actions

3. Functions

4. Jacket Properties and Information

**Jacket Actions :** [View Properties](#) [Edit Properties](#) [Update Number](#) [Print Properties](#) [Print All Properties](#) [Signoff](#)

**General**

Title: College of Engineering Tech Services  
 Document Number: CN-00241  
 Status: Contract Development  
 Contract Category: Receivable  
 Contract Sub Category 1: Professional & Artistic Services  
 Contract Sub Category 2:  
 Contract Sub Category 3:  
 Contract Description: Engineering student to work on a project for company

Chart: 2 - Chicago  
 Organization Code: 284 - Engineering Admin  
 Fund (if Receivable or Payable):  
 PO Number(s):

Execution Date: Apr 27, 2011  
 Contract Amount: 5000  
 Amendment Amount: 0  
 UBIT:  
 University Template: Yes

**Contractor**

Contracting Party Name: Partner Co  
 Contracting Party DBA:  
 Contracting Party Phone:  
 Contracting Party Email:

Contracting Party Address 1:  
 Contracting Party Address 2:

Close

# Choosing the Checklist

Select Checklist :

Checklist Type : contract \*

Checklist Category : Receivable \*

Checklist Name : File Leases with Secretary of State - A \*

- File Leases with Secretary of State - A
- File Leases with Secretary of State - B
- File with Comptroller
- Test Reject Checklist
- RGA Templ Under 5K Dept Signature Authority No Changes
- RGA Templ Under 5K Comptroller Signature No Changes
- UIC Revenue**
- Log Filing with Comptroller in Prodigio Contract
- RGA Non-Templ
- RGA Templ Over 5K No Changes
- RGA Templ w Changes

Choose the checklist

?

OK Cancel









# Checklist

Document Dashboard : Contract - Electrical and Computer - Partner Co ( CN-00241 v 1.0 )

Checklist Actions : [Refresh Checklist](#) [Select Checklist](#)

Checklist [?]

Items Per Page: 50

Item Name	Date Assigned	Due Date	Assigned To	Date Completed	Completed By
 Department Approval [?]					<a href="#">Assign Item</a>
 College Approval [?]					<a href="#">Assign Item</a>
 Campus Approval [?]					<a href="#">Assign Item</a>
 OBFS Contract Review [?]					<a href="#">Assign Item</a>
 Send final contract to Other Party for signature [?]					<a href="#">Assign Item</a>
 Import/Scan final contract with Other Party signature [?]					<a href="#">Assign Item</a>
 University Signature (Comptroller) [?]					<a href="#">Assign Item</a>
 Send copy of fully executed contract to 3rd party [?]					<a href="#">Assign Item</a>

Notes

Reminders

Obligations

Checklist

Workflows

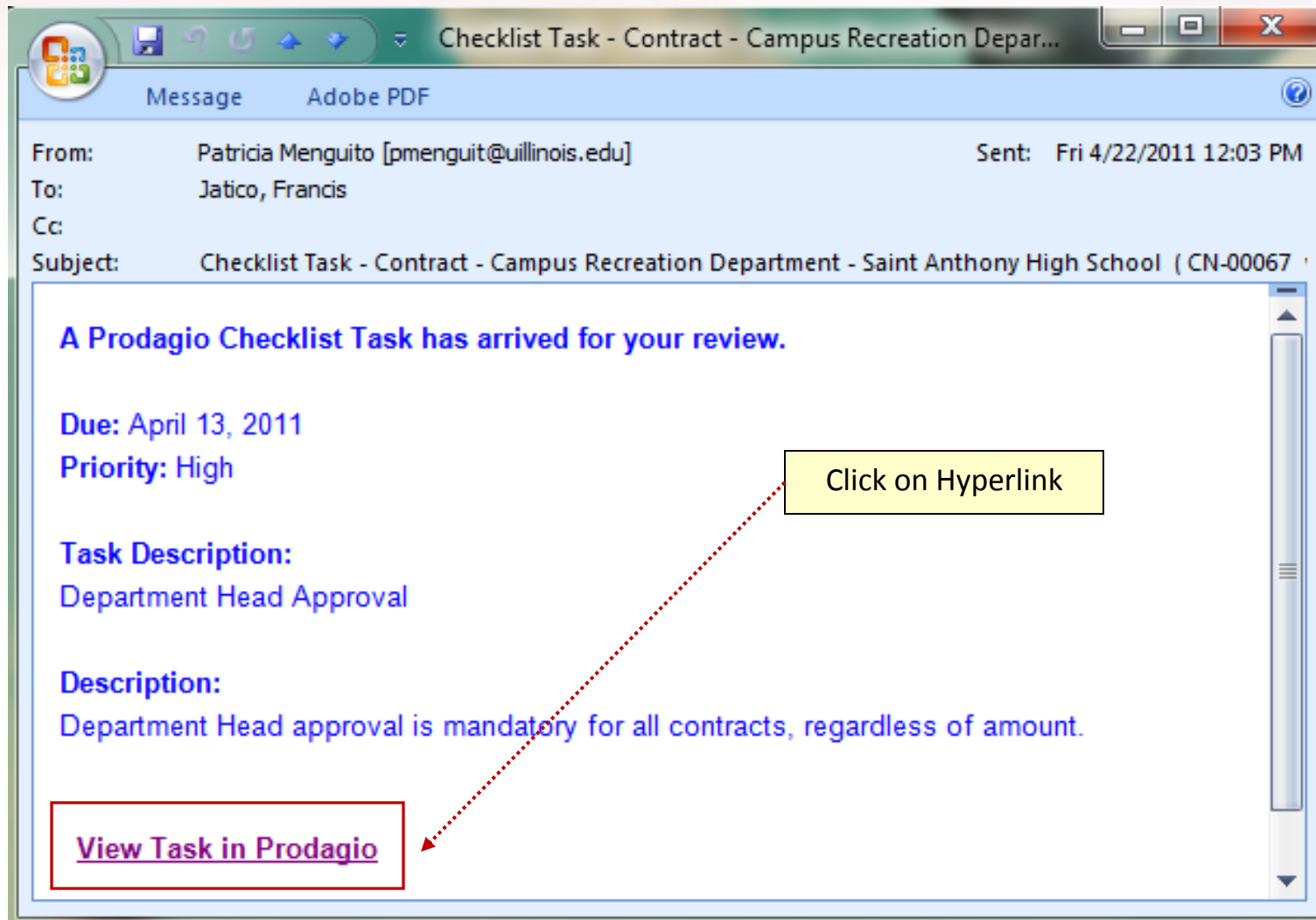
Signature Required

Instructions or supplemental information for each checklist item

?

Close

# Approvals – Email Notice




# Approvals – Checklist Item

Task Manager: Checklist :

Checklist




**Details**

 Checklist Task - Contract - Campus Recreation Department - Saint  
 Sent Date : 04/22/2011  
 Sender : Patricia Menguito  
 Priority : 10

Item Name : Department Head Approval  
 Notification Date : 04/13/2011  
 Description : Department Head approval is mandatory for all contracts, regardless of amount.

Requirements :   
 Instructions : Department Head Approval

**Included By Sender**

Document Name	Modified	
 Contract - Campus Recreation Department - Saint ...	4/13/2011 1:42 PM	  <a href="#">View</a> <a href="#">Add Note</a> <a href="#">Remove</a>

**To Complete This Checklist:**

Enter your Password and Comments below, then click the Complete button. This will complete the Checklist.

Password :   
 Comments :

**To Reject This Checklist:**

Enter your Comments below, then click the Reject button. This will reject the Checklist.

Click to Open Document

Login required to verify identity

Approve  
Reject  
Take no immediate action



# Approvals – My Tasks

prodagio | contract Contract Management System Help Preferences Logout

My Tasks Recent Favorites

My Task view

Documents My Tasks Reports Search

Actions : My Workflows Workflow Reporting Start Workflow

Tasks I am available Items Per Page: 50

Priority	Subject	From	Date Received	Status	Instructions	
!	Checklist Task - CR - Rev Patient Care - Big Hospital Group ( C	Francis Jatco	4/22/2011 12:03 PM		Department Concept Approval	<a href="#">View</a> <a href="#">Delete</a>
	Checklist Task - Contract - Forum - BP, Inc ( CN-00137 v 1.1 )	Patricia Menguito	4/22/2011 12:02 PM		Department Approval	<a href="#">View</a> <a href="#">Delete</a>
!	Checklist Task - Contract - Campus Recreation Department - Saint	Patricia Menguito	4/22/2011 12:02 PM		Department Head Approval	<a href="#">View</a> <a href="#">Delete</a>
	Checklist Task - Contract - CON - School Care - CPS ( CN-00080	Nancy Dorsch	4/22/2011 12:02 PM		Import/scan in contract with 3rd party notes and/or requested changes	<a href="#">View</a> <a href="#">Delete</a>
	Checklist Task - Contract - CON - School Care - CPS ( CN-00080	Nancy Dorsch	4/22/2011 12:02 PM		OBFS Contract Review	<a href="#">View</a> <a href="#">Delete</a>
!	Checklist Task - Contract - Dawn Collins - Chicago Police Depart	Patricia Menguito	4/22/2011 9:53 AM		Campus Approval	<a href="#">View</a> <a href="#">Delete</a>
!	Checklist Task - Contract - College of Engineering - Motorola (	Patricia Menguito	4/20/2011 12:01 PM		College Approval	<a href="#">View</a> <a href="#">Delete</a>
	Checklist Item - Contract - Athletics - LocalSwimClub LLC ( CN-	Patricia Menguito	4/19/2011 4:36 PM		Department	<a href="#">View</a> <a href="#">Delete</a>

UNIVERSITY OF ILLINOIS  
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

# Search

## Advanced Search: General

General My Saved Searches All Saved Searches

Contains: Full Text Search

Object Type: All Attachments

Properties:

Category

and

Category

[Add another property](#)

Date: Modified

☒ Anytime

☐ From Date

To Date

Size: Any Size

Additional: ☐ Find hidden objects

☐ Find all versions

Full text searching allows users to easily search for documents with specific content

Users can also search for documents with specific property values (metadata)

Search Results for "contracts"

prodagio contract Contract Management System Help Preferences Logout

Reports Custom Reports Crystal

Admin Documents My Tasks Reports Search

97 Results for "contract" in CONTRACT\_DEV - 4/21/2011 2:14 PM

Search Results Page 1 of 2 Items Per Page: 50

Name	Ranking	Document Title	Category	Date Modified	View	Edit	Check Out	Check In
CR - Receivable - Quarterback Club ( CR-000026 v 1	87%	Contract Request	Receivable	Apr 12, 2011	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Check Out</a>	<a href="#">Check In</a>
U of I - Contract Request Form General Document Number CR-000026 Status	Contract	Development	Contract	Request Type Receivable ...				
CR - Receivable - Yes We Can ( CR-000034 v 1.0 )	87%	Contract Request	Receivable	Apr 12, 2011	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Check Out</a>	<a href="#">Check In</a>
U of I - Contract Request Form General Document Number CR-000034 Status	Contract	Development	Contract	Request Type Receivable ...				
CR - Receivable - Quarterback Club ( CR-000029 v 1	86%	Contract Request	Receivable	Apr 12, 2011	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Check Out</a>	<a href="#">Check In</a>
U of I - Contract Request Form General Document Number CR-000026 Status	Contract	Development	Contract	Request Type Receivable ...				
CR - Receivable - National Association of College and	86%	Contract Request	Receivable	Apr 12, 2011	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Check Out</a>	<a href="#">Check In</a>
U of I - Contract Request Form General Document Number CR-000031 Status	Contract	Development	Contract	Request Type Receivable ...				
CR - Payable - test ( CR-000025 v 1.0 )	86%	Contract Request	Payable	Apr 13, 2011	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Check Out</a>	<a href="#">Check In</a>
U of I - Contract Request Form General Document Number CR-000025 Status	Contract	Development	Contract	Request Type Payable Ch...				
CR - Receivable - Amendment - Schutt Sports ( CR-0	85%	Contract Request	Receivable - Amendment	Apr 18, 2011	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Check Out</a>	<a href="#">Check In</a>
U of I - Contract Request Form General Document Number CR-000016 Status	Contract	Development	Contract	Request Type Receivable ...				
CR - Receivable - Testing Company ( CR-000019 v 1	85%	Contract Request	Receivable	Apr 18, 2011	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Check Out</a>	<a href="#">Check In</a>
Contract Request Form General Document Number CR-000019 Status	Contract	Development	Contract	Request Type Receivable ...				
CR - Payable - Morris High School ( CR-000022 v	85%	Contract Request	Receivable	Apr 14, 2011	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Check Out</a>	<a href="#">Check In</a>
Contract Request Form General Document Number CR-000022 Status	Contract	Development	Contract	Request Type Receivable ...				
CR - Payable - Test Co. Inc. ( CR-000023 v 1.0 )	85%	Contract Request	Payable	Apr 15, 2011	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Check Out</a>	<a href="#">Check In</a>

UNIVERSITY OF ILLINOIS  
CHICAGO

# Reports

Reports View

**prodagio|contract** Contract Management System [Help](#) [Preferences](#) [Logout](#)

**Reports** Custom Reports Crystal

Admin Documents My Tasks **Reports** Search

**Reports**

Please select a Report from the list

- Checklist Assigned Tasks (Open)
- Checklist Assigned Tasks (Completed)
- Checklist Assigned Tasks (Rejected)
- Checklist Assigned Tasks (Open or Completed)
- Checklist Tasks Workload (Assigned and Open)
- Deleted Documents Report
- Obligation Assignments
- Obligation Workload
- Obligations by Contract
- Obligations by Location, Category, Responsibility
- Principal Documents by Status

**prodagio|contract** Contract Management System [Help](#) [Preferences](#)

**Reports** Custom Reports Crystal

**Reports**

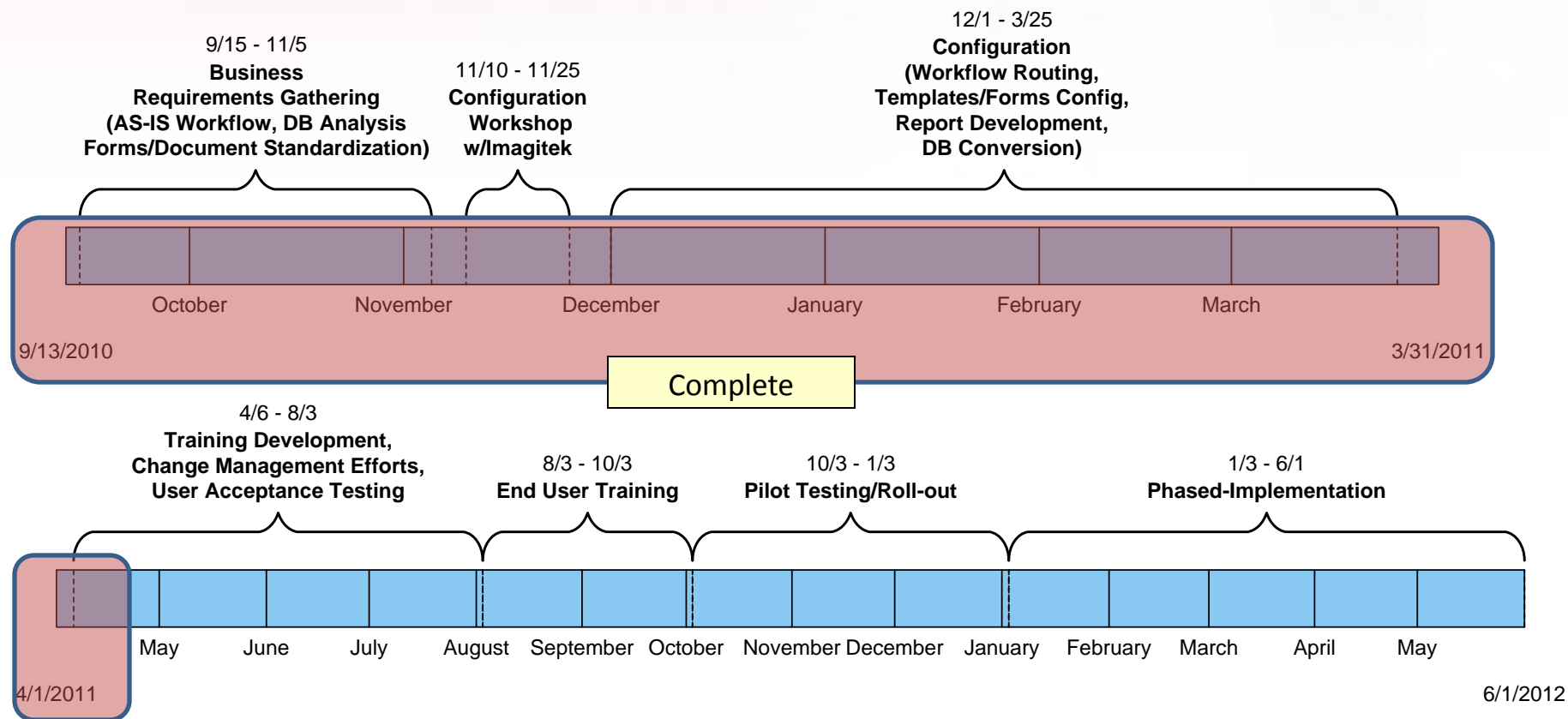
- Comptroller Filing Report
- Lease Filing Report
- Payable and Receivable Leases
- Payable Contracts Over 5K
- Payable Leases
- UBIT Report on Revenue Generating Contracts

**Custom Reports**

**NOIS**  
INTEGRATED

# TIMELINE

# Timeline



# Questions / Concerns?