Contract Management System

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

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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
- Tacking of changes
- Tracking, Searching, Reporting, and Querying
- Email system alerts and reminders
Training

Web-based Overview

Policy and Procedures Simulation by Roles
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
Main Screen

1. System Links
2. Tab Row
3. View Icons
4. Folder Action Icons
5. Quick Search
6. Folder Structure
7. Central listing of contracts and documents
Document Dashboard

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
Document Dashboard

1. Available Actions

2. Jacket Actions

3. Functions

4. Jacket Properties and Information
Choosing the Checklist

Choose the checklist
Checklist

Signature Required

Instructions or supplemental information for each checklist item
Approvals – Email Notice

A Prodagio Checklist Task has arrived for your review.

Due: April 13, 2011
Priority: High

Task Description:
Department Head Approval

Description:
Department Head approval is mandatory for all contracts, regardless of amount.

View Task in Prodagio

Click on Hyperlink
Approvals – Checklist Item

Click to Open Document

Login required to verify identity

Approve
Reject
Take no immediate action

Task Manager: Checklist:

Checklist

Details
Checklist Task - Contract - Campus Recreation Department - Saint
Sent Date: 04/23/2011
Sender: Patricia Manguito
Priority: 10

Instructions: Department Head Approval

Requirements:
None

Included By Sender
Document Name: Contract - Campus Recreation Department - Saint
Modified: 04/23/2011 11:42

View
Add Note
Remove

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:

Complete
Reject
Close
# Approvals – My Tasks

The image displays the My Task view of the prodagio contract management system. The screenshot shows a table of tasks with columns for Priority, Subject, From, Date Received, Status, and Instructions. Each task is associated with an action button for View and Delete. The tasks listed include:

- **Checklist Task - CR - Rev Patient Care - Big Hospital Group (C)** by Francis Jatico, received on 4/22/2011 12:03 PM, status Department Concept Approval.
- **Checklist Task - Contract - Forum - BP, Inc (CN-00137 v 1.1)** by Patricia Menguito, received on 4/22/2011 12:02 PM, status Department Approval.
- **Checklist Task - Contract - Campus Recreation Department - Saint** by Patricia Menguito, received on 4/22/2011 12:02 PM, status Department Head Approval.
- **Checklist Task - Contract - CON - School Care - CPS (CN-00080)** by Nancy Dorsch, received on 4/22/2011 12:02 PM, status Import/scan in contract with 3rd party notes and/or requested changes.
- **Checklist Task - Contract - CON - School Care - CPS (CN-00080)** by Nancy Dorsch, received on 4/22/2011 12:02 PM, status OBFS Contract Review.
- **Checklist Task - Contract - College of Engineering - Motorola** by Patricia Menguito, received on 4/20/2011 12:01 PM, status College Approval.
- **Checklist Task - Contract - Athletics - LocalSwimClub LLC (CN-** by Patricia Menguito, received on 4/19/2011 4:36 PM, status Department Approval.
Full text searching allows users to easily search for documents with specific content. Users can also search for documents with specific property values (metadata).
Reports

Standard Reports

Custom Reports

Reports View
TIMELINE
**Timeline**

- **9/15 - 11/5**
  - Business Requirements Gathering
  - (AS-IS Workflow, DB Analysis, Forms/Document Standardization)

- **11/10 - 11/25**
  - Configuration Workshop w/Imagitek

- **12/1 - 3/25**
  - Configuration
  - (Workflow Routing, Templates/Forms Config, Report Development, DB Conversion)

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**4/6 - 8/3**
- Training Development, Change Management Efforts, User Acceptance Testing

**8/3 - 10/3**
- End User Training

**10/3 - 1/3**
- Pilot Testing/Roll-out

**1/3 - 6/1**
- Phased-Implementation

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**Complete**

- **9/13/2010**
- **3/31/2011**
- **4/1/2011**
- **6/1/2012**
Questions / Concerns?