Workshop Presenter
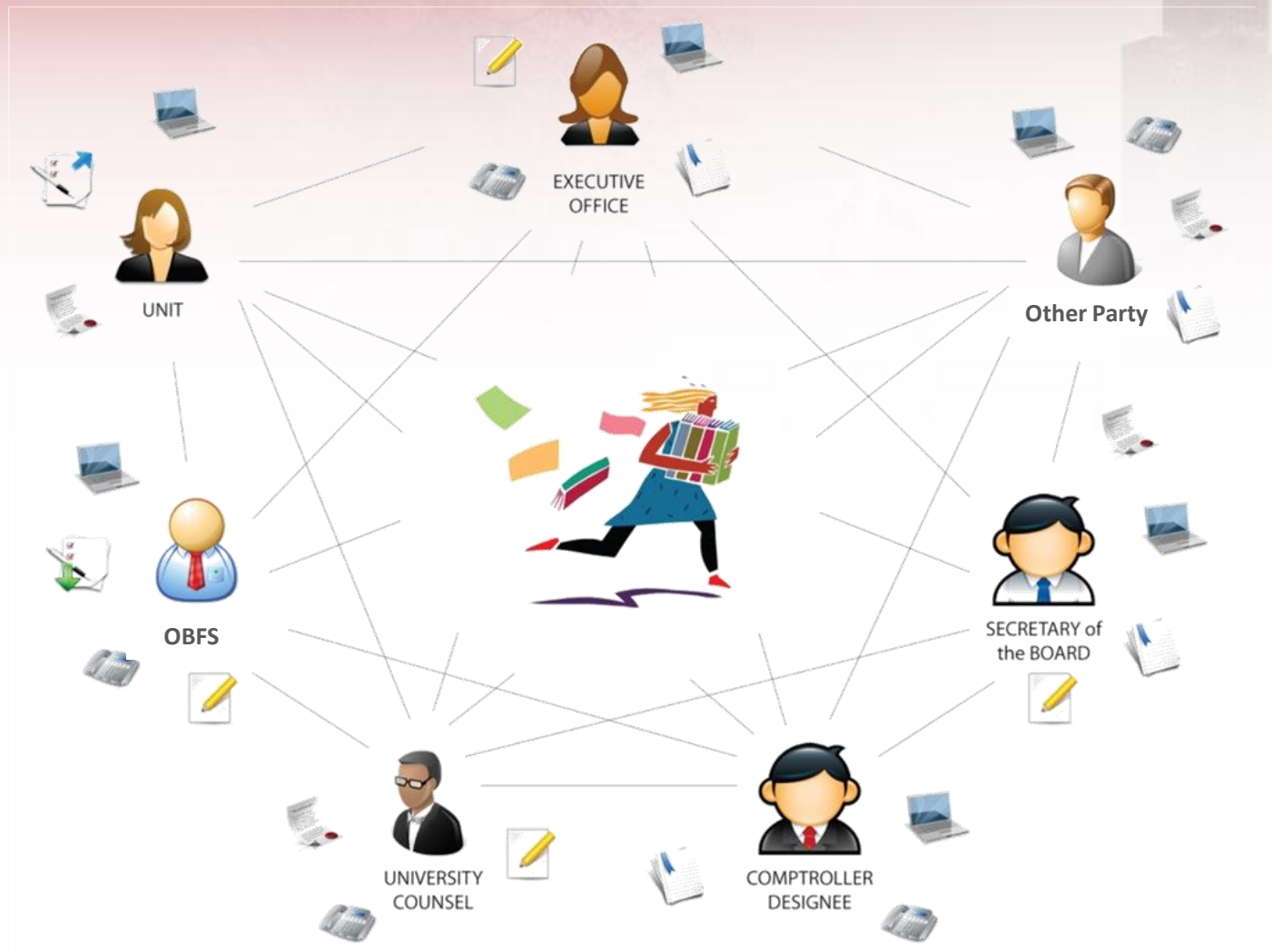
Francis Jatico

Director of Business Development Services

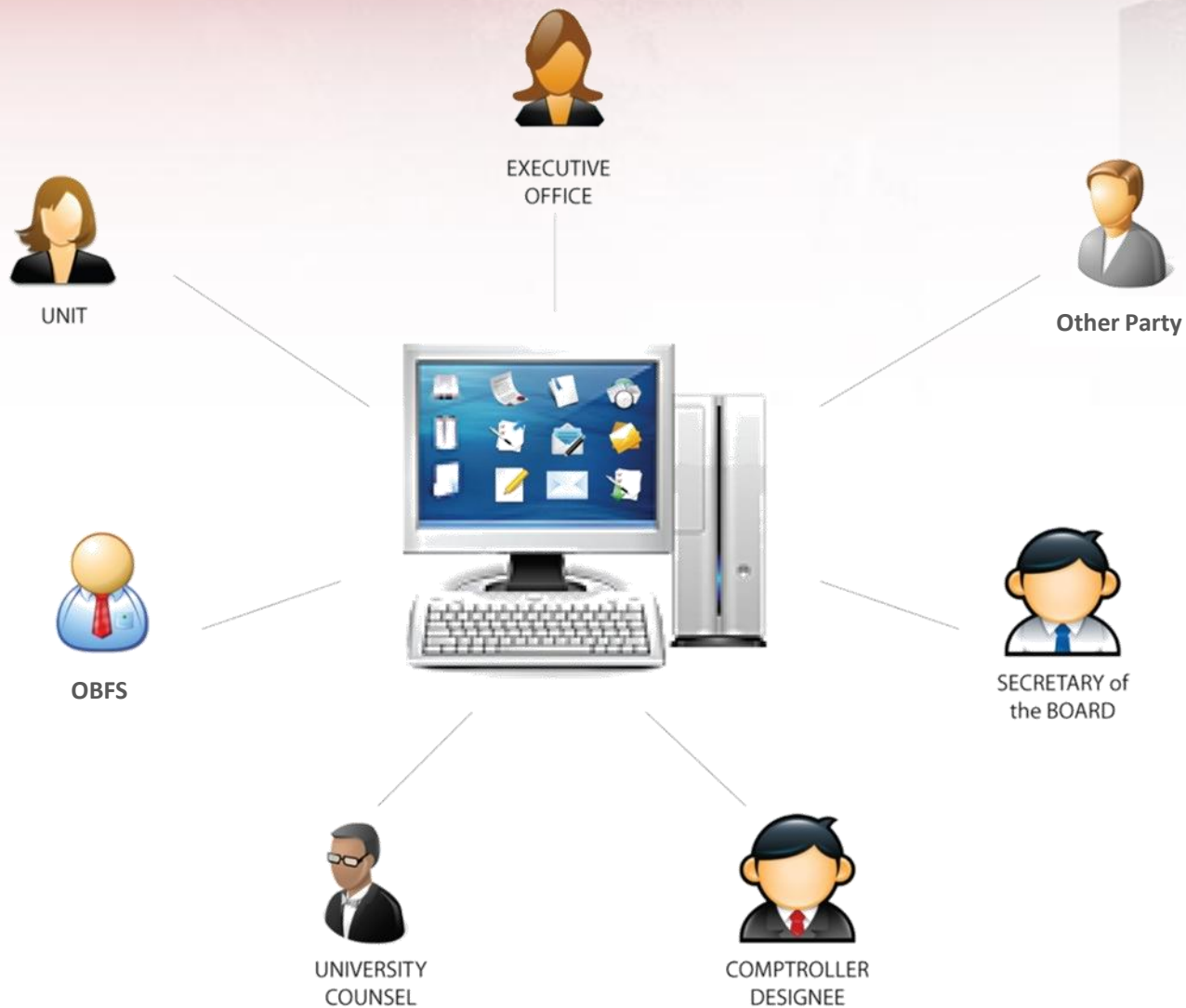Phone: 312-355-0783

Email: jatico1@uillinois.edu

Workshop Objectives

- Need and Benefits

- System Considerations

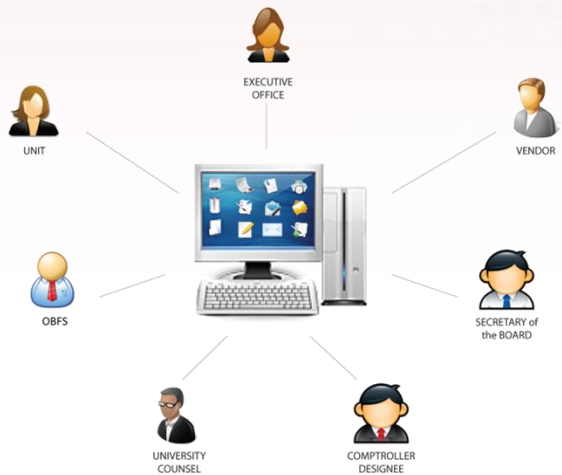- System Preview

- Implementation Timeline

NEED AND BENEFITS

Current Process – Paper Driven
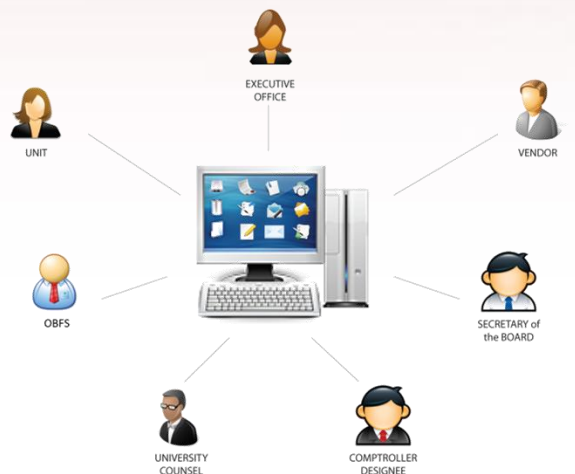
Electronic Process

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	Create	Process and Negotiate	Execute	Manage
• Pre-approved Templates • New Contract Requests • Amendment Requests • Template Requests • Internal Approvals	• Contract Documents • Contract Templates • Supporting Documentation	• Business, Risk and Legal Review • Route for approvals • Check Current Status	• Signatures of both parties • Submit to University Contract Office	• Search • Report • Archive • Retention • Self-service

10

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/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

Main Screen

1. System Links

2. Tab Row

3. View Icons

prodagio contract
Help   Preferences   Logout

| Personal | Cabinets | Reference | Recent | Subscriptions | Favorites |

Admin   Documents   My Tasks   Reports   Search

Cabinet : Karen Deering

4. Folder Action Icons

5

Quick Search : [   ] Go

Folders

« Karen Deering ▦▶
Starts With [   ] → ✕

Items Per Page: 50 ▾   Show All Objects ▾

CONTRACT_DEV
⊞ Karen Deering

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

Document Dashboard

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 Prodagio Contract
RGA Non-Templ
RGA Templ Over 5K No Changes
RGA Templ w Changes

Choose the checklist

OK Cancel

19

# Checklist

Approvals – Email Notice

Approvals – Checklist Item

Click to Open Document

Login required to verify identity

Approve
Reject
Take no immediate action

Approvals – My Tasks

Search

Advanced Search: General

| General | My Saved Searches | All Saved Searches |

Contains: Full Text Seach ◀········· Full text searching allows users to easily search for documents with specific content

Object Type: All Attachments ▼

Properties:
Category ▼ contains
and ▼ Category ▼ contains
Add another property

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

Date: Modified
○ Anytime
○ From Date
To Date

Size: Any Size

Additional: ☐ Find hidden objects
☐ Find all versions

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prodagio|contract *Contract Management System*   Help   Preferences   Logout

Admin Documents My Tasks Reports Search

| Reports | Custom Reports | Crystal |

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	
CR - Receivable - Quarterback Club (CR-000026 v 1	87%	Contract Request	Receivable	Apr 12, 2011	View Edit Check Out Check In
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	View Edit Check Out Check In
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	View Edit Check Out Check In
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	View Edit Check Out Check In
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	View Edit Check Out Check In
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	View Edit Check Out Check In
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	View Edit Check Out Check In
ontract Request Form General Document Number CR-000019 Status Contract Development Contract Request Type Receivable ...					
vable - Mooris High School (CR-000022 v	85%	Contract Request	Receivable	Apr 14, 2011	View Edit Check Out Check In
ontract 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	View Edit Check Out Check In

Search Results for "contracts"

UNIVERSITY OF ILLINOIS
Urbana-Champaign · Chicago · Springfield

Reports

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)

| October | November | December | January | February | March |

9/13/2010

3/31/2011

Complete

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

| May | June | July | August | September | October | November | December | January | February | March | April | May |

4/1/2011

6/1/2012

Questions / Concerns?