Procurement
Contract Portal
User Guide
## Contents

Introduction ................................................................................................................................................................2

Access the Portal .........................................................................................................................................................2

Home Page ...................................................................................................................................................................2

   End User My Contracts .........................................................................................................................................2

   Buttons, Icons, and the Action Bar ......................................................................................................................3

Create a New Contract Request ................................................................................................................................5

   Requester Information ...........................................................................................................................................5

   Vendor Information ..............................................................................................................................................6

   Contract Information ............................................................................................................................................6

FAQs .............................................................................................................................................................................9
Introduction

The Procurement Contract Portal is a contract management system that allows the University to route contracts for review and retrieve executed contracts if necessary. Contracts vary in complexity, and some don’t require the level of review that the Procurement Contract Portal provides. Standard contracts used for advertisements, catering, and hotels may be emailed directly to Contract Management. Non-standard contracts should be submitted through the Procurement Contract Portal.

Access the Portal


2. This page provides information to help you decide how your contract should be submitted. If your contract is considered a non-standard contract, click the “Upload to Procurement Contract Portal” button.

3. Log in to the Central Authentication Portal using your myBama username and password.

Home Page

End User My Contracts

This page will display all contracts you have submitted. Upon first logging into the system, no records will be display. As contract requests are submitted, they will be added to this page.
**Buttons, Icons, and the Action Bar**

The action bar includes 3 selections.

- **New**: Click the New icon to being the process of creating a new contract request.
- **Views**: The Views drop down will allow you to switch the view of what information can be seen in the contract table display.

  *Note: Many fields are not available to be seen by portal users, and as such the views will not display information you cannot see.*

- **Search**: Clicking the search drop down will display the search bar, allowing you to search for contract records using keywords and phrases.

  With the search bar extended, the first available drop down will allow you to specify which field the search corresponds to. The second drop down will allow you to choose if the value is found or not found, or use any of the available quantifiers. The third field allows you to enter a word or phrase to search for. Click the Go button to retrieve the results

  - Refine – Checking this box and entering a new word or phrase will refine the search further, as opposed to performing a new search.
  - String – Allows for wild card searches, where the string of letters is found anywhere in the phrase.
  - Context – Will show where in the record the word or phrase is found.
  - Active Only – Will only display active records.
  - More Options – Allows for additional options to be used while searching

- **Edit**: Edit icon will attempt to display the record in edit mode.

  *Note: You can only edit records you have created.*

- **View**: The View icon will display the record in view mode.

- **Refresh/Expand/Collapse**: The top-right corner of the home screen contains 3 additional icons that can be used.

  - **Refresh**: The first icon is the Refresh icon. Clicking it will refresh the page and display any new records or changes to existing records.

    *Note: Any time you edit or view a record the system automatically refreshed.*
- **Expand**: The middle + icon will expand the section to the whole page. This will allow each of the 2 sections to display across the entire page, for easier viewing of records. Once expanded, only the Refresh and Collapse icons will be available.

- **Collapse**: The last – icon will collapse a section on the page. Collapsing the page will minimize the section. When a section is expanded by using the Expand icon, clicking the Collapse icon will revert the page back to normal. When no section is expanded, using the Collapse icon will minimize that section, but not display the other section in full page mode. While collapse, the icon will change to the Revert to Normal icon, which will revert the page back to normal.
Create a New Contract Request

1. Start by ensuring that all documents associated with this contract request are saved in a folder on your computer that may be easily accessed. Please make sure that the document to be signed is in an editable format. Word documents are preferred.

2. Login to the Procurement Contract Portal and from the Home page, click the “New” button.

3. A pop-up will display the new contract request page. Complete the information in each of the following sections.

   *Note: If the new contract request page does not display, you may need to turn off your browser’s pop-up blocker for this site.*

**Requester Information**

<table>
<thead>
<tr>
<th>Requester Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Requester:</td>
</tr>
<tr>
<td>Requester Email:</td>
</tr>
<tr>
<td>Department:</td>
</tr>
</tbody>
</table>

a. The requester name and email address will be prefilled based on the user’s information. However, this can be edited if the contract is being submitted on behalf of another person.

b. Click the search icon (magnifying glass) to search for the Department name. Use the pop-up window to search for and select the department, and click “Import/Replace”.

   ![Department Search Pop-Up](image)
Vendor Information

- Use the search icon (magnifying glass) to select the Vendor Company. Use the pop-up window to search for and select the department, and click “Import/Replace”.

  *Note: If the vendor is not in the list, click “Cancel” at the bottom of this window to return to the Contract screen and hand key the information.*

- Repeat the same steps to select the Main Contact Name and the Vendor Signer.

Contract Information

- Click “Attach Document” to begin uploading the documents associated with this contract request. Use the Contract Document pop-up window to enter the details about this particular document.

  *Document Title:* Provide a description of the document.
c. **Document Type:** Since there may be supporting documents attached to the request in addition to the contract, this field is used to add a category to keep them organized. Use the drop-down to choose the type for the document.

   **Note:** Always attach a copy of the previous contract with the vendor, if one exists.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Signature</td>
<td>Select this option for the contract that is currently being submitted for signature.</td>
</tr>
<tr>
<td>Internal Review</td>
<td>This will be used by subsequent reviewers to add any additional backup documentation. This option will not be used when submitting the initial request.</td>
</tr>
<tr>
<td>Signed Contract</td>
<td>This option will be used to designate the fully executed contract. This option will not be used when submitting the initial request.</td>
</tr>
<tr>
<td>Vendor Email Reply</td>
<td>Use this to provide additional information in the form of emails from the vendor.</td>
</tr>
<tr>
<td>Previous Contract</td>
<td>If there was a previous contract with this vendor, please attach it using this option.</td>
</tr>
</tbody>
</table>

d. **Attach Document:** Click the Attach/Manage link to begin uploading the document. Then click the green “Attach File(s)” button at the bottom of the pop-up window.

   Navigate to the file on your computer, and double click it. The file should be added to the list on the Attachments pop-up window. Click Finish.

   You will be returned to the Contract Document window. Click Save. When you return to the Contract request, you should see the document listed.

   Repeat these steps to add any additional documents.

e. **Contract Title:** Enter a descriptive title for the Contract Request. This will be what you’ll use on your home screen to identify this request.

f. **Contract Amount:** If the contract has a dollar amount, enter it here.

g. **Is There A Previous Contract?** If there has been a previous related contract, indicate that here.
h. **Contract Start Date:** Click the Calendar icon to select the start date for the contract.

i. **Contract Description:** Please use this space to provide an explanation of the purpose for the contract including a risk/benefit analysis. List out both the pro’s and con’s to help subsequent reviewers fully understand the situation.

j. **Additional Documents:** Repeat these steps to attach additional documents as needed.

4. Once all information has been entered and documents have been attached, click the green “Submit for Contract Management Review” button at the bottom of the screen.

You will receive a confirmation message with a link to view the contract if desired.

By submitting this request you acknowledge that you have read and understood this agreement.

5. The contract request will be listed on the home screen, and it will be routed for approval. You will be notified by email when it has been completed.
FAQs

What information do I need to sign in to the Contract Portal?

The Contract Portal uses central authentication, so you'll be able to login using your myBama username and password.

May I continue to email my contracts to Contract Management?

You may continue to email standard contracts for things like hotels, off-campus catering, or advertisements, but other types of contracts should be uploaded through the Contract Portal.

What other documentation should be uploaded with the contract?

Please add any additional information that you feel might be helpful in the review of the contract. This could include:
- Previous contracts with this vendor.
- Email communication with the vendor.
- Copies of any terms that may be referred to in the contract including click through terms or documents that are hyperlinked in the contract.

Where does my contract request go after it is submitted?

Your contract request will be routed to Contract Management. They will review it to determine which other departments need to be involved based on the contents of the contract.

How do I check the status of my contract request?

Users will have access to view all of their contract requests from the Contract Portal home page. From there, you will be able to see where your request is in the process.

How do I obtain a copy of the fully executed contract?

Once the contract has been signed, you will receive a copy by email.

How do I determine which contracts need to be submitted through the Procurement Contract Portal?

In a nutshell, the Contract Portal will only be used to process non-standard contracts that may be more complex in nature. Standard contracts for advertising, catering, or hotels may be emailed directly to Contract Management.
What are the benefits of using this system?

The Procurement Contract Portal gives us a good way to track the progress of contracts that may have to be reviewed at multiple levels. It also creates an archive of contracts that may be referenced later on. The system helps us get your contracts completed quickly and ensures that nothing gets lost along the way.

Can I look up contracts that were previously submitted through the portal?

Absolutely. One of the advantages of the Contract Portal is that it gives you access to your previously submitted contracts. You will see them listed on your home page.

How will I know when my contract has been completed?

You will be notified by email when your contract is complete. You will also be able to access it from the home page of the Contract Portal.

How long will it take for my contract to be processed?

It is our goal to process your contracts quickly and efficiently. In fact, 99% of all contracts submitted to Contract Management are completed within 24 hours. However, it may take longer to review more complex contracts and time must be allowed for negotiating terms if necessary. Please submit your contracts as soon as possible to allow plenty of time for processing.

Do I need to be granted special access to be able use the Procurement Contract Portal?

All UA employees already have what they need to use the system. Simply log on using your myBama user ID and password.