Procurement
Contract Portal
User Guide
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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.

Access the Portal

2. 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 displayed. As contract requests are submitted, they will be added to this page.

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. For a list of commonly required documents, see the Frequently Asked Questions section at the end of this guide. 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**

- 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. The “Requester” should be the individual who is most familiar with the contract.

- 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”.

Vendor Information

a. 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.

b. Repeat the same steps to select the Main Contact Name and the Vendor Signer. The Vendor Signer should be the individual who is authorized to contract on behalf of the business.

Contract Information

a. 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.

b. **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>Not Applicable</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>Supporting Documentation</td>
<td>Use this category for all the additional uploaded documents that are related to the contract.</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. This is a required field.

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

i. **Contract End Date:** Click the Calendar icon to select the end date for the contract.

j. **Contract Description:** Briefly explain why you want to enter into the contract. What is it’s purpose/function? How will it benefit your department and the University?

k. **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.

   ![Information](image)
   
   By submitting this request you acknowledge that you have read and understood this agreement.

   ![View Contract](link)

   ![Close](link)

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 into the Contract Portal?

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

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.
- Software/IT Form,
- Independent Contractor Form,
- Certificate of Insurance,
- Sole Source Justification Letter,
- Scope of Work,
- Vendor Disclosure Statement,
- Any other document referenced 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.

What are the benefits of using this system?
The Procurement Contract Portal provides the University with one centralized digital repository for contracts. This increases efficiency and decreases error in processing which results in faster approval times. This improved method of document storage and management allows for easier access to contracts for compliance and auditing purposes.

**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.