



Overview

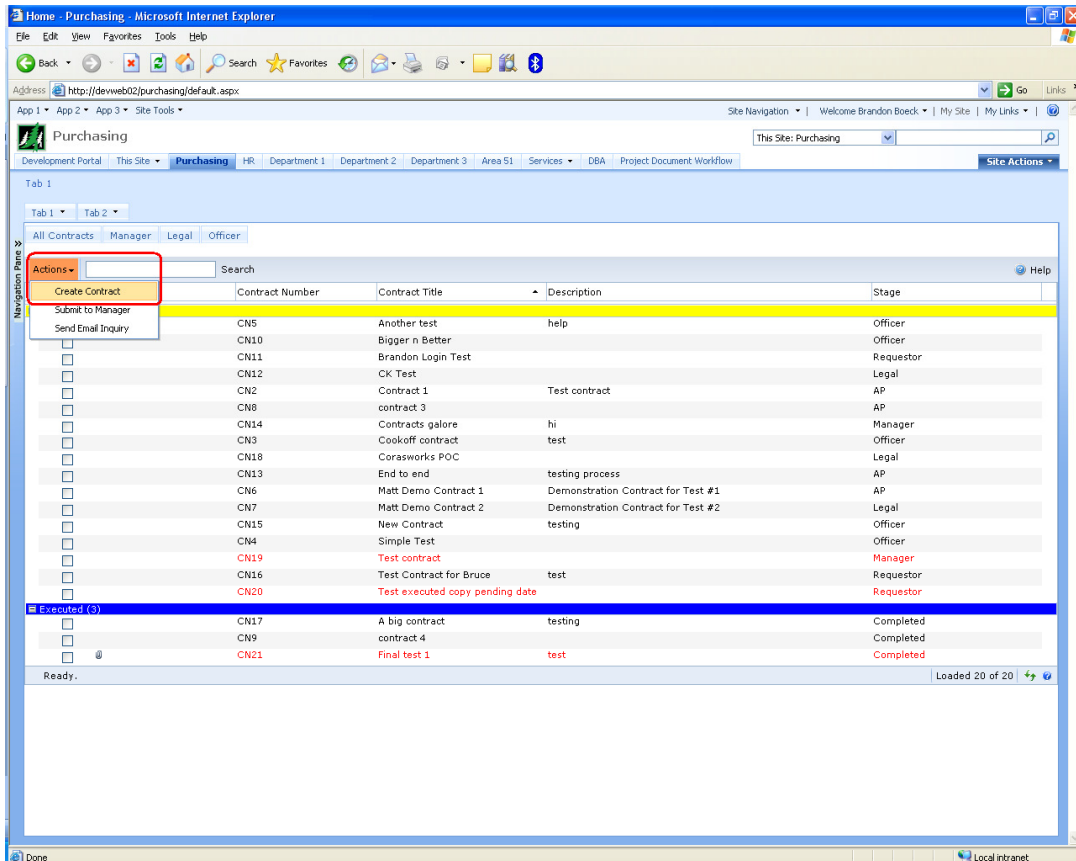
The Contract Management Application is a tool used within the Woodforest Portal to manage the contract process. This document provides an overview of the process. See the Procedures document for step-by-step instructions.

Create a contract:

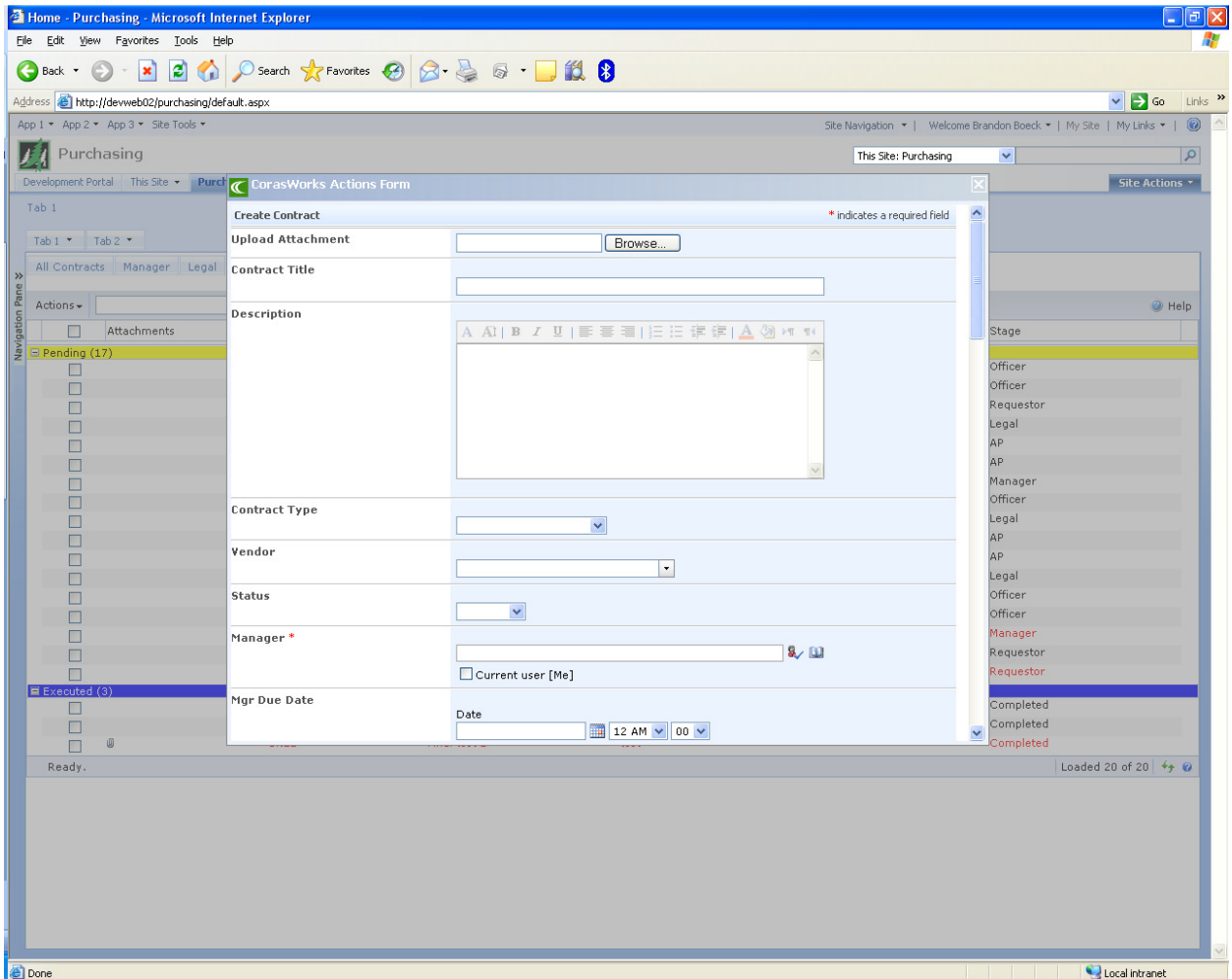
The screenshot below of the contract management application shows a view of the All Contracts page. The page is grouped by Pending (yellow heading) and Executed (blue heading) contracts. There is no filtering on this page so all contracts are visible. The Stage column (far right column) shows the user where the contract is during the approval workflow. The contracts with red font mean that their executed copy status has been in a pending state for more than 30 days.

Follow these steps to create a contract:

1. Click the Actions button
2. Click the Create Contract option



3. Fill in the contract form and click the OK button at the bottom of the form.
 - a. After clicking the OK button, the form will close and the user will be taken back to the All Contracts view. The contract will then be visible under the Pending group heading. A Contract Number is automatically generated and will also be displayed in the view.



Submit a contract to the manager for approval:

After a contract has been created it will be displayed on the “All Contracts” page with the Stage set to Requestor. To begin the contract approval workflow, follow these steps:

1. Click the checkbox for the contract you want to submit.
2. Click the Actions button
3. Click the Submit to Manager option
 - a. This action will send an email to the Manager specified in the form when the contract was created and will also set the Stage to Manager (far right column on the All Contracts screenshot below). The manager will receive an email with a link to the Manager “view” of the contract management application. The manager will only be able to see contracts for which they are assigned.

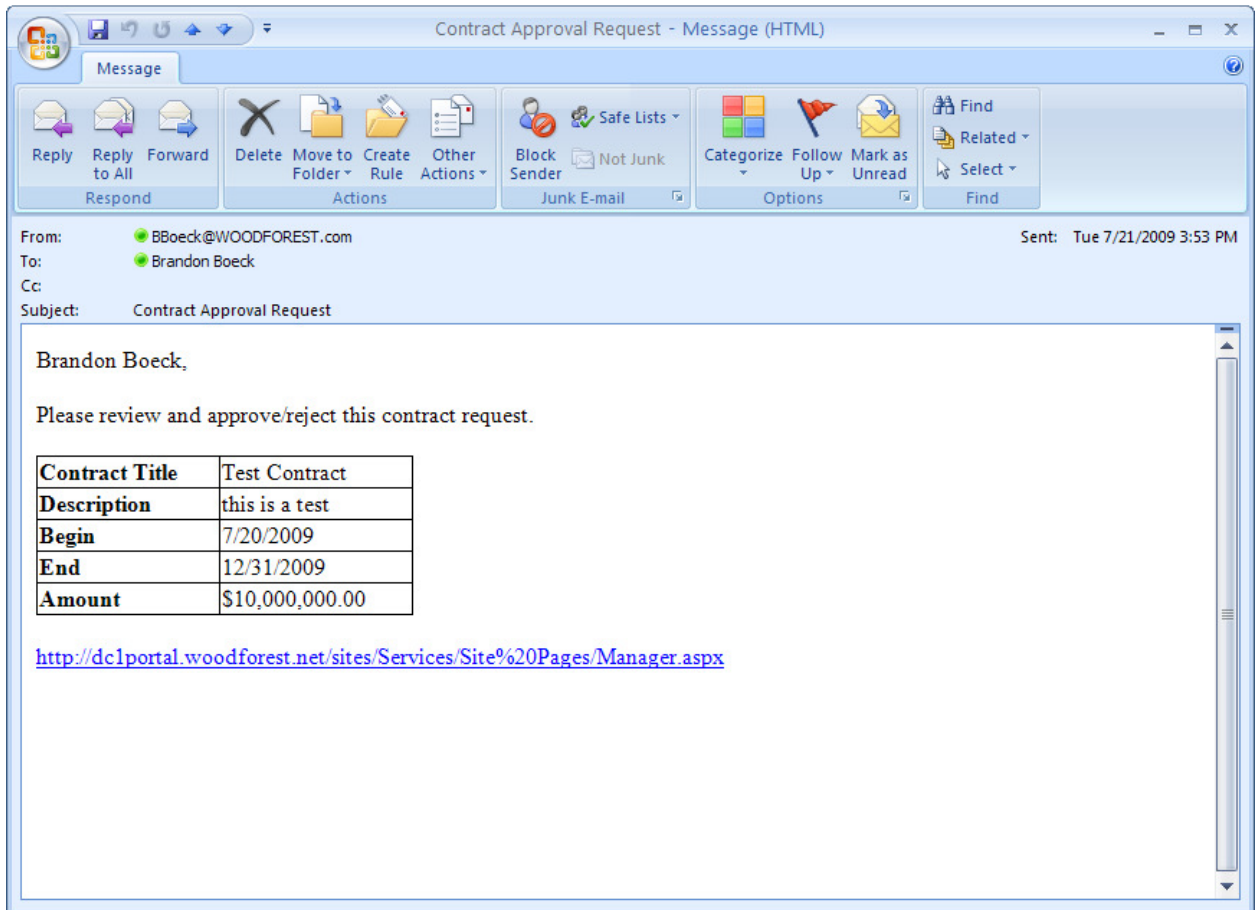
The screenshot shows the 'All Contracts' page in the Purchasing application. The table below represents the data shown in the screenshot:

Contract Number	Contract Title	Description	Stage
CN5	Another test	help	Officer
CN10	Bigger n Better		Officer
CN11	Brandon Login Test		Requestor
CN12	CK Test		Legal
CN2	Contract 1	Test contract	AP
CN8	contract 3		AP
CN14	Contracts galore	hi	Manager
CN3	Cookoff contract	test	Officer
CN18	Corasworks POC		Legal
CN13	End to end	testing process	AP
CN6	Matt Demo Contract 1	Demonstration Contract for Test #1	AP
CN7	Matt Demo Contract 2	Demonstration Contract for Test #2	Legal
CN15	New Contract	testing	Officer
CN4	Simple Test		Officer
CN19	Test contract		Manager
CN16	Test Contract for Bruce	test	Requestor
CN20	Test executed copy pending date		Requestor
CN17	A big contract	testing	Completed
CN9	contract 4		Completed
CN21	Final test 1	test	Completed

Approval process:

Managers, Legal, and Officers will all follow the same process for reviewing and approving contracts. Each user in the approval workflow will receive an email when it is their turn to approve the contract. The process goes from Requestor -> Manager -> Legal -> Officer. This is a sequential workflow.

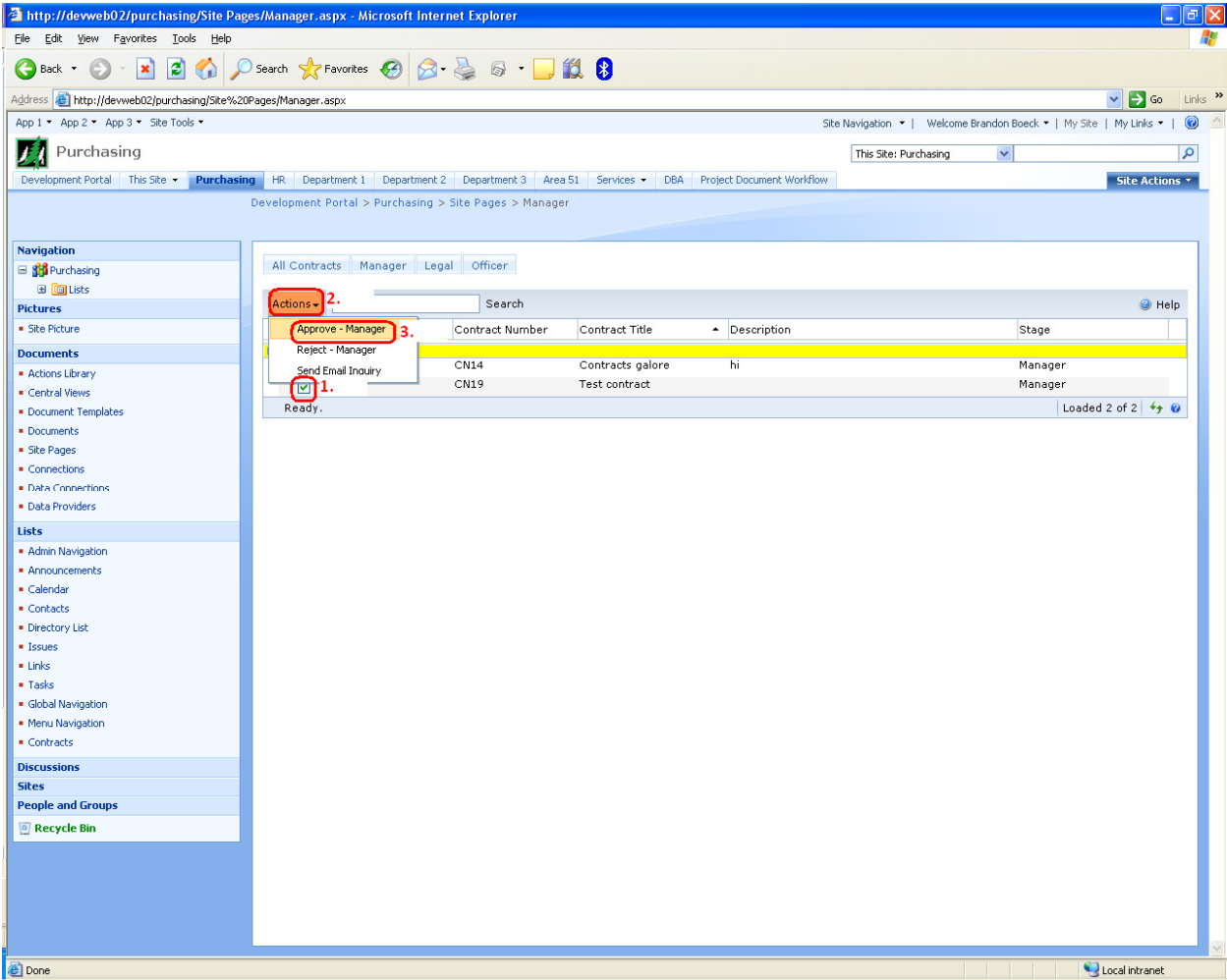
Contract approval request email



After you receive the email request to approve a contract, click the link in the email and follow these steps to approve or reject a contract:

1. Click the checkbox for the contract you want to approve/reject.
2. Click the Actions button
3. Click the Approve (or Reject) option
 - a. If approved, then this action will capture the approval date, set the Stage to that person's role (Manager, Legal, or Officer), and send an email to the next person in the workflow. The next person will receive an email with a link to their "view" of the contract management application. They will only be able to see contracts for which they are assigned.

- b. If rejected, then this action will capture the rejection date, give the user the ability to add comments, and then an email is sent to the Requestor to notify them of the rejected status and the Stage is set to Requestor.



Send email inquiry:

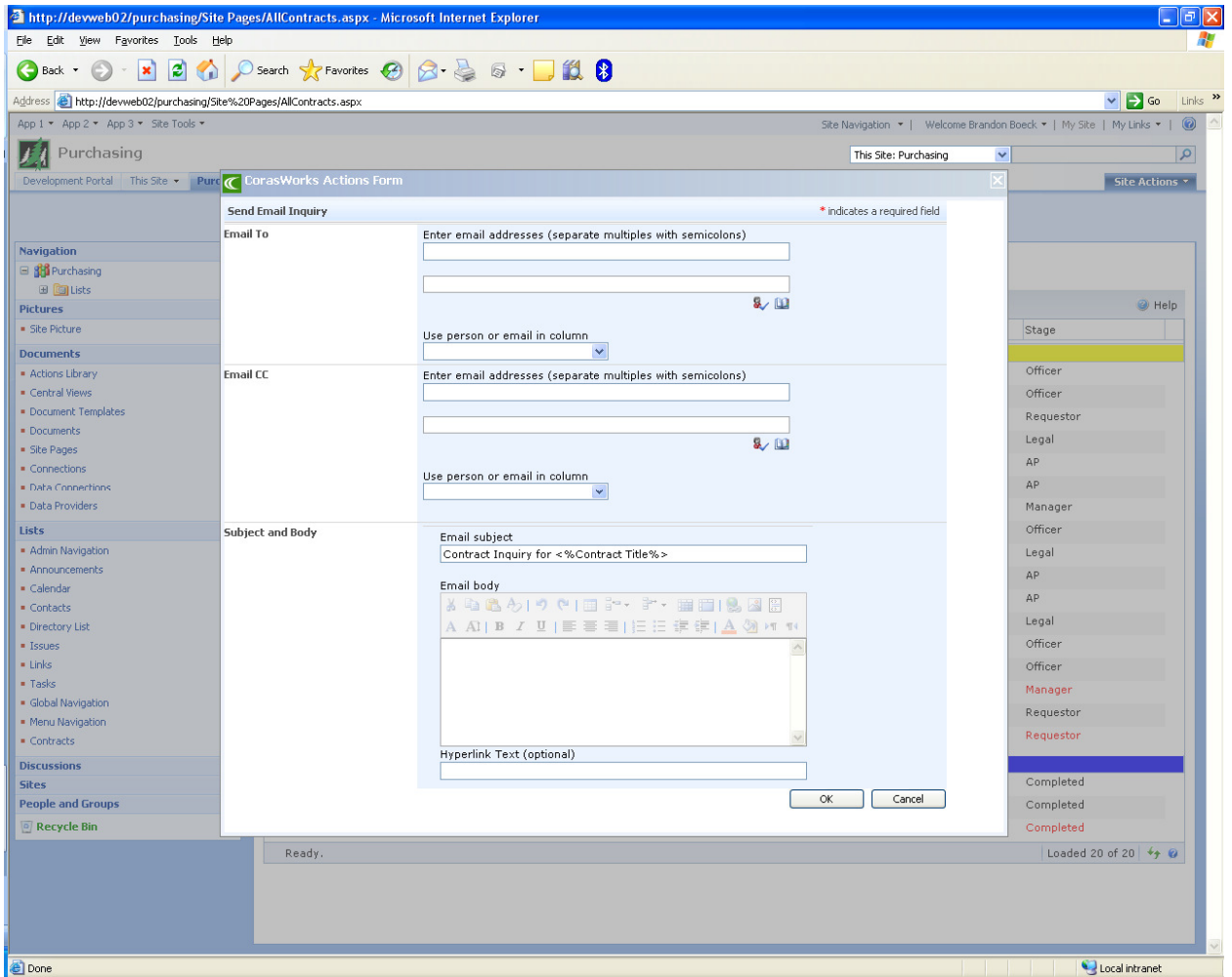
This action will provide a method for the user to send an email regarding a specific contract and/or multiple contracts. The action will allow the user to choose who to send the email to and modify the subject and body of the email. The email will also include link(s) to the contract(s).

1. Click the checkbox for the contract you want to send an email
2. Click the Actions button
3. Click the Send Email Inquiry option

The screenshot shows a web browser window displaying a 'Purchasing' site. The main content area is a table of contracts with columns for Contract Number, Contract Title, Description, and Stage. A context menu is open over the first row (Contract CN5), with 'Send Email Inquiry' selected. A checkbox in the first column of the table is checked. The interface includes a navigation sidebar on the left and a top navigation bar.

Contract Number	Contract Title	Description	Stage
CN5	Another test	help	Officer
CN10	Bigger n Better		Officer
CN11	Brandon Login Test		Requestor
CN12	CK Test		Legal
CN2	Contract 1	Test contract	AP
CN8	contract 3		AP
CN14	Contracts galore	hi	Manager
CN3	Cookoff contract	test	Officer
CN18	Corasworks POC		Legal
CN13	End to end	testing process	AP
CN6	Matt Demo Contract 1	Demonstration Contract for Test #1	AP
CN7	Matt Demo Contract 2	Demonstration Contract for Test #2	Legal
CN15	New Contract	testing	Officer
CN4	Simple Test		Officer
CN19	Test contract		Manager
CN16	Test Contract for Bruce	test	Requestor
CN20	Test executed copy pending date		Requestor
CN17	A big contract	testing	Completed
CN9	contract 4		Completed
CN21	Final test 1	test	Completed

4. Fill in the email inquiry form
 - a. The email subject is pre-filled with "Contract Inquiry for <%Contract Title%>". The <%Contract Title%> syntax will automatically be replaced with the actual contract title selected in step 1.



Contract Management Application Workflow

