

Contract Management

User Guide

July 2018

Version 2

The logo for eVA is displayed vertically on the left side of the page. It features the letters 'eVA' in a bold, green, sans-serif font. The 'e' is lowercase and positioned below the 'VA'. The letters are set against a white background that is curved to follow the shape of the logo. The logo is surrounded by a blue and green gradient background with a wavy, circular pattern.

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INTRODUCTION

OVERVIEW

The Contract Management module includes the following:

Contract Management: A comprehensive screen to provide access to all information required to manage a given contract. The Contract Summary authoring and publishing features are also accessed from this screen.

Contract Summary Authoring: Contract Summary documents can be generated from within Sourcing & Contracting. Buyers can control the content of the summary documents they generate, and can easily combine data from multiple agreements using customized templates.

Contract Publishing: Buyers can enter information, such as the Publish and Take-Down dates, when they generate their summary files. The system will automatically access the necessary information and publish it as directed for entities that are set up to have their contracts appear on a Web page.

CONTRACT MANAGEMENT NAVIGATION

The Contract Management module consists of three screens:

- **CONTRACT LISTING** screen (Figure 6)
- **CONTRACT MANAGEMENT** screen (Figure 8)
- **TEMPLATE MAINTENANCE** screen (Figure 38)



Figure 1: Contract Admin Information Added to the MA's Procurement Screen

Master Agreement(MA) Dept: A301 ID: 5678 Ver.: 1 Function: New Phase: Final Modified by ksteinbr2 , 02/27/2019

Step 1: Header

General Information Shipping/Billing Contacts Additional Information

*Contract Number: EP2952090

*Reason for MA Update: New

*Title: Microsoft CRM software licenses for Marketing 2019-2020

*Description: Microsoft CRM software licenses for Marketing for the period of 2019-2020.

*Effective Begin Date: 03/01/2019

*Expiration Date: 01/31/2020

*Contract Admin: wpowell
 Wendell Powell
 804-786-8738
 wendell.powell@vdacs.virginia.gov
 Virginia Department of Agriculture and Consumer Se

Figure 2: Contract Number Links Added to Procurement Views in a Procurement Folder

Details for Procurement (81615)

Buyer : ksteinbr2 Manager : blowther1 Closed Date :
 Team : Team : Est Completion : 2/27/19
 Department : A301

Requisition	Solicitation	Response	Evaluation	Award	Contract Number	Post-Award
Add Document Milestones Notes	Add Document Milestones Notes Notices Q & A	Milestones Notes Bidders	Milestones Notes	Add Document Milestones Notes MA A301 5678.1 F SHI Intern	EP2952090	Milestones Notes Renewals

ACCESSING CONTRACT MANAGEMENT

There are several ways to access Contract Management functions:

- From the left navigation menu.
- From a specific procurement.
- From the **PAGE SEARCH** screen.

The following sections detail these approaches.

FROM THE LEFT NAVIGATION

1. Click the Sourcing & Contracting link from the Go To dropdown menu (Figure 3) to go to the **Sourcing & Contracting HOME** screen.

Figure 3: From the Knowledge Center Navigation Panel

The screenshot shows the eVA system interface. At the top left, the eVA logo is visible. The navigation bar includes 'Go To' and 'Dashboards'. A dropdown menu is open under 'Go To', listing various options: Contractor Staff Mgmt, Data Management, eMail / eForms, Quick Quote, Report and Resource Center, **Sourcing & Contracting** (highlighted with a red circle), and User Management. The main content area features a table with the following data:

ID	Description	Status	Create Date
EVA001	Yarn for Winter	Composing	10/28/2017
EVA001_QQ016191	C-7985 - Fall Fiber Art Supplies	Composing	02/07/2017
2STPA-A136-TS-0004-1	Yarn for Youth Camp	Bids Opened	12/22/2015
2STPA-A136-TS-0001-1	Fiber supplies for 2016 Youth Camps	Bids Opened	11/25/2015
RFFPA-A136-124_TS-1		Draft	12/09/2014
RFFPA-A136-123_TS-1		Draft	12/09/2014
MA-A136-2723-4	Contract Test	Expired	06/02/2014

Below the table, there are two summary charts: 'Entity Spend Summary' and 'My Work Summary'. The 'Entity Spend Summary' chart shows a bar for 'Small \$' and 'Contract \$'. The 'My Work Summary' chart shows a bar for 'Composing'.

2. You can access the **CONTRACT LISTING PAGE** by selecting View and clicking the My Contract List link (Figure 4).

Figure 4: My Contract List



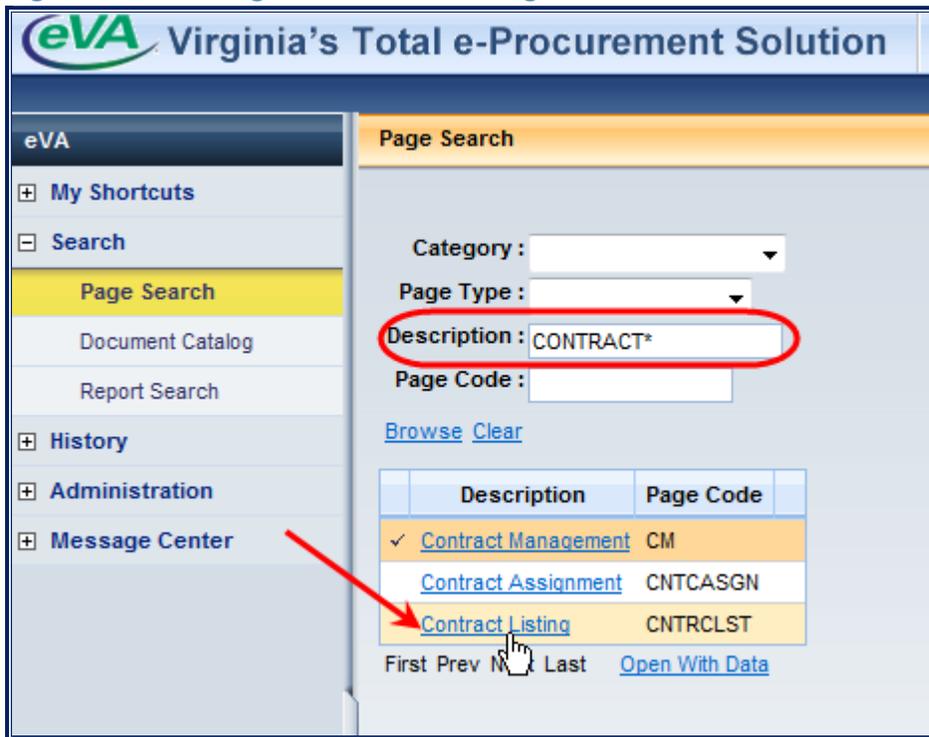
FROM A SPECIFIC PROCUREMENT

To access contract management information for a specific procurement, navigate to the procurement Details view and click the contract number, as indicated in Figure 2.

FROM PAGE SEARCH

You can also access the **CONTRACT LISTING** screen from the **PAGE SEARCH** screen. The easiest way to do this is by using a key word or phrase in the **Description** field. In the example shown below in Figure 5, entering the word *Contract* in the **Description** field returns all page names that begin with that word in the results set.

Figure 5: Accessing the Contract Listing Screen



Note: Although you can access Contract Management from the **PAGE SEARCH** screen, information will load for only the most recent contract. Access the **CONTRACT MANAGEMENT** screen from the **CONTRACT LISTING** screen or from the corresponding Procurement Folder.



CONTRACT LISTING SCREEN

The **CONTRACT LISTING** screen provides a searchable list of contracts. Figure 6 shows the **CONTRACT LISTING** screen default view; an explanation of possible actions appears below the illustration.

Figure 6: Contract Listing Screen

Contract Number	Contract Description	Contract Period	Contract Type	Contract Officer	Contract Admin	Proc Folder
FAM-16-064-02	Victims of Crime Act (VOCA) Child Abuse/Neglect Treatment	07/01/2016 through 06/30/2018	80-Grant Contract	Mark Orlando	Andrea Hendricks	7045
P194-7038	testing	12/18/2017 through 12/25/2017		Teresa Evans	Teresa Evans	7038
A194-7025	RK8038002	12/12/2017 through 12/11/2018		Mark Orlando	Rich admin	7025
A194-7023	RK8038001 Part 2	12/12/2017 through 12/11/2018		Mark Orlando	Rich admin	7023
A194-7021	RK8038001	12/12/2017 through 12/11/2018		Mark Orlando	Rich admin	7021
A194-7020	RK8038001	12/31/2017 through 12/10/2018		Mark Orlando	Rich admin	7020
A194-7019	RK8038001	12/12/2017 through 12/10/2018		Mark Orlando	Rich admin	7019
A194-7018	RK8038001	12/11/2017 through 12/10/2018		Mark Orlando	Rich admin	7018
A136-6914	8083-success-02	10/01/2017 through 11/30/2017		Govind L	Govind L	6914
A136-6634	Tesy	08/07/2017 through 08/07/2018		Mark Orlando	Rich admin	6634
A194-6571	8298-ma	07/01/2017 through 07/31/2017		Mark Orlando	Govind L	6571
A212-6445	REBID	10/19/2017 through 10/19/2018	8-Purchasing Agreement	Mark Orlando	Rich admin	6445
A212-6204	Stone with Bud	04/28/2017 through 07/14/2017	51-Agency Optional Contract	Mark Orlando	1 Buyr/Mary	6204
A136-6186	Test 3.8	04/25/2017 through 05/28/2017	1-Mandatory Source	Govind L	Govind UAT L	6186
EP2541833	Replacement Equipment	04/07/2017 through 04/07/2017	8-Purchasing Agreement	Lisa Kirby1	Lisa Kirby1	6143

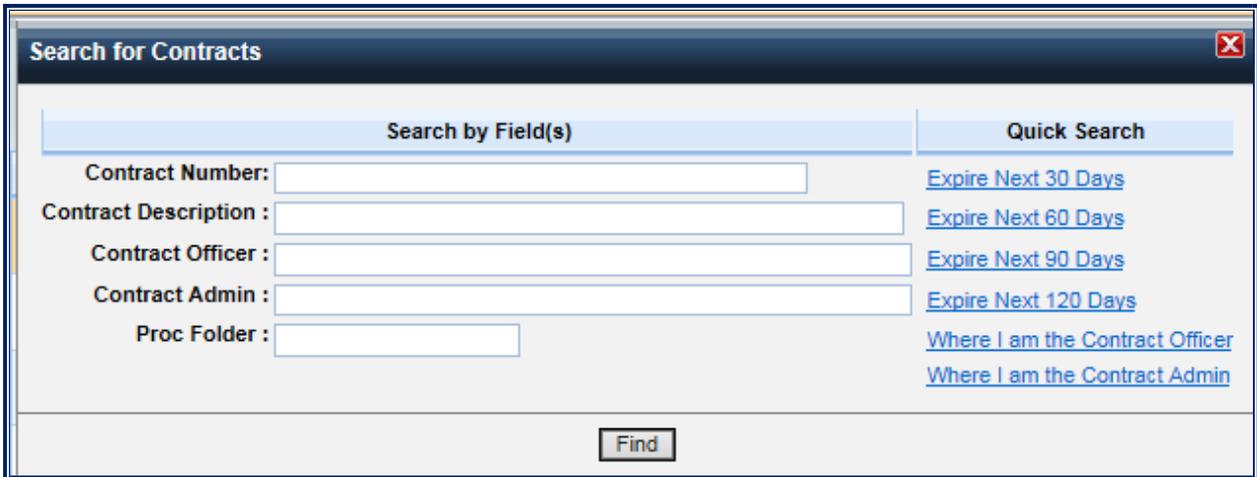
- Search Button:** Click Search to open the **SEARCH FOR CONTRACTS** dialog box (Figure 7).
- Create Contract Button:** Click Create Contract to create a new master agreement.
- View... Selection:** Use these buttons to select the view to be displayed; you can choose to see only your contracts (**My Contracts**), all contracts, active contracts, or run a 30-60-90-120 day report for expiring contracts.
- Contract Number:** The contract numbers in this column are presented as links; click a contract number to launch the **CONTRACT MANAGEMENT** screen for that contract.
- Proc Folder:** The procurement folders listed in this column are presented as links; click a folder number to open the corresponding procurement folder.
- Navigation Links:** Use these links to navigate through the list.

SEARCHING FOR CONTRACTS

The **SEARCH FOR CONTRACTS** dialog screen (Figure 7) provides two ways to find what you are looking for. You can search by one or more of the displayed data fields, or you can use a quick-search filter to see all contracts that expire within a certain period of time (30, 60, 90, or 120 days).

If you are searching by Contract Description, Contract Officer, or Contract Admin, you can use the wildcard character (*) to broaden your search. (Note that the Contract Number field does not permit key phrase searches at this time.) This is especially helpful if you are not sure of the exact term you need. Suppose you enter James B* in the Contract Admin field. The search results will include any Contract Administrator whose first name is James and whose last name begins with B; for example, James Baker, James Brady, and James Brown.

Figure 7: Search for Contracts Dialog



The screenshot shows a dialog box titled "Search for Contracts" with a close button (X) in the top right corner. The dialog is divided into two main sections: "Search by Field(s)" and "Quick Search".

Search by Field(s)	Quick Search
Contract Number: <input type="text"/>	Expire Next 30 Days
Contract Description: <input type="text"/>	Expire Next 60 Days
Contract Officer: <input type="text"/>	Expire Next 90 Days
Contract Admin: <input type="text"/>	Expire Next 120 Days
Proc Folder: <input type="text"/>	Where I am the Contract Officer
	Where I am the Contract Admin

At the bottom center of the dialog is a "Find" button.

CONTRACT MANAGEMENT SCREEN

Contract Management information can be accessed for a given agreement from the procurement folder, or from the **CONTRACT LISTING** screen (Figure 6), by clicking the Contract Number. You will be able to view or add relevant information, such as the Contract Period and contact information for the Contract Administrator; create Contract Summary files; and generate Spend reports for all orders submitted under the contract.

The information presented on the **CONTRACT MANAGEMENT** screen is divided into two main areas: the top portion, which is referred to as the Contract Header and which contains general information; and the bottom portion, which contains detailed information grouped under several tabs.

Figure 8: The Contract Management Screen¹



Figure 8 above shows the two areas of the **CONTRACT MANAGEMENT** screen. The Contract Header displays the contract Description (title), and the

1. **Contract Number**
2. **Category/Type of Contract:** For example, *2-Mandatory Statewide Contract, or 77-Agency Contract.*
3. **Contract Period:** The start date and end date for the overall contract period are displayed.
4. **Active Contract Period(s):** The start and end date of the active contract period.
5. **Contract Officer Information:** Name, email, and phone number are displayed.
6. **Contract Administrator Information:** Name, email, and phone number are displayed.

The bottom portion of the **CONTRACT MANAGEMENT** screen displays the following tabs, in order:

- Active Agreements
- Publishing
- Notes & Correspondence
- Orders
- Supporting Info
- Expired Agreements

The following sections review each of these tabs individually.

¹This screen image and others in this document have been edited to remove open space in order to render a clear image with readable text. All text and controls are intact, but may have been slightly repositioned.

ACTIVE AGREEMENTS TAB

The Active Agreements tab displays information regarding Master Agreements (MAs). This information is displayed in accordance with the following rules:

- Only submitted, active agreements can be displayed. Draft agreements do not appear.
 - The agreement must have a document status of *Final* or *Historical Final*.
 - The agreement’s **Effective End Date** must not be in the past.
- Information is grouped by **Vendor**, then by **Agreement Number** and **Version**.
- Information is displayed using a “tree” view that allows sections to be expanded and collapsed as needed.

As shown in Figure 9, the top level of the Active Agreements display will be the vendor name (*Town Police Supply*), followed by a list of active agreements for each vendor.

Figure 9: Vendor with Active Agreements Displayed



Click the plus sign (+) next to any agreement to access:

- Line Items
- Authorized Organizations
- Terms and Conditions
- Sub Contractors
- Renewal Options
- Attachments

Figure 10 shows the expanded view of Town Police Supply Agreement #1587 version 1. The subsections can be further expanded to show details. Note that your screen may not match exactly the image shown below.

Figure 10: Active Agreement Information Displayed in Tree Format



LINE ITEMS

There are three types of line items, each with its own display format. Figure 11 shows all three types: Line 1 is an Item line, Line 2 is a Service line, and Line 3 is a Discount line.

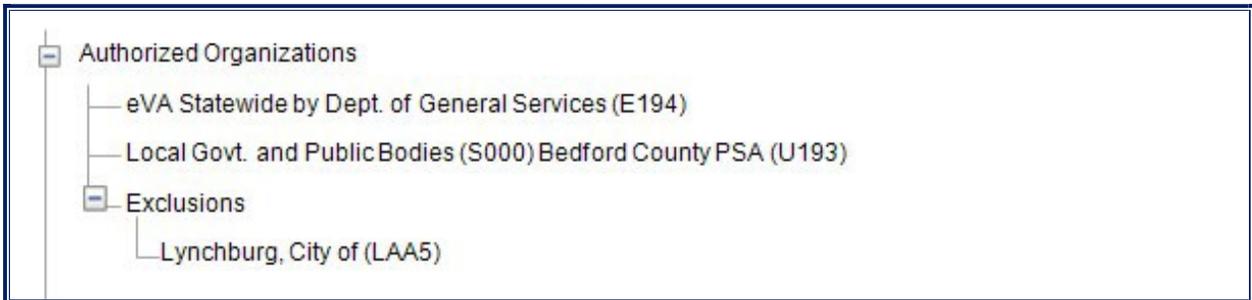
Figure 11: Three Types of Line Item Displays



AUTHORIZED USERS

The list of organizations authorized under a specific agreement is displayed here (Figure 12). Exclusions that are specifically called out in the agreement can also be viewed here.

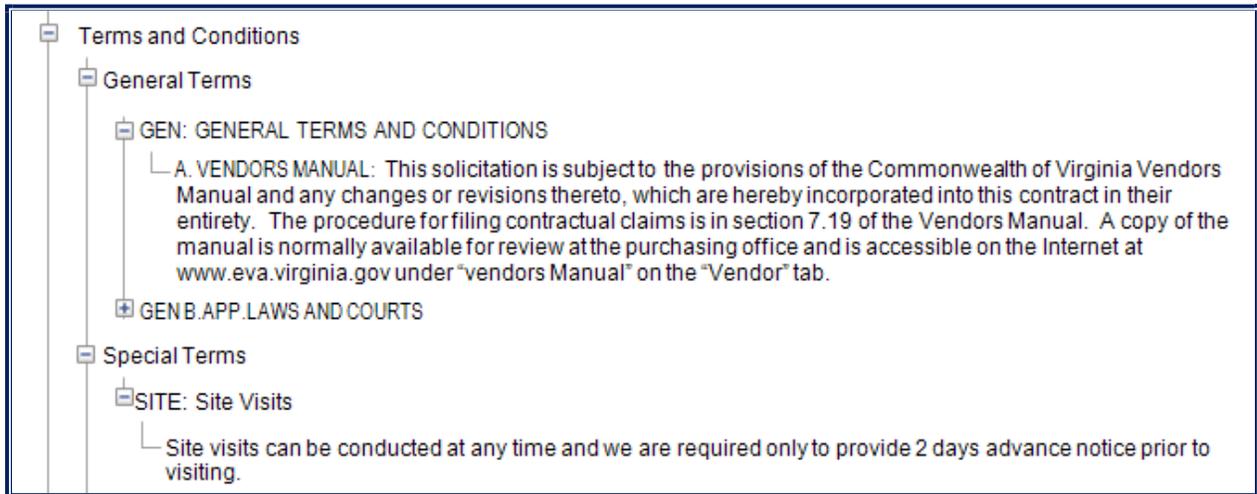
Figure 12: Expanded View of Authorized Organizations and Exclusions



TERMS AND CONDITIONS

The next expandable section under an active agreement is Terms and Conditions. As shown in Figure 13, General terms and Special terms can be displayed separately.

Figure 13: Partly Expanded View of Terms and Conditions



SUB CONTRACTORS

Information for any subcontractors associated with an active agreement can be displayed here (Figure 14), including the percent of the total project for which each subcontractor is responsible. Subcontractor comments or remarks can also be displayed here, to the extent that they are incorporated into the agreement.

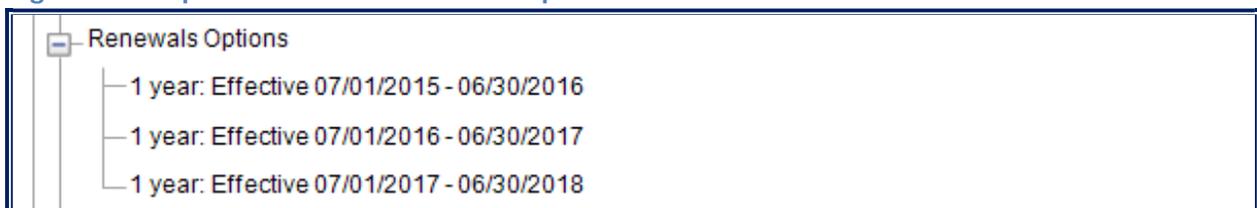
Figure 14: Expanded View of Subcontractor Section



RENEWAL OPTIONS

If the contract is renewable, options will be displayed here. In the example shown in Figure 15, the contract in question has options for three renewals of one year each.

Figure 15: Expanded View of Renewal Options Section





ATTACHMENTS

The last expandable section on the **Active Agreements** tab is for attachments. The file name of each attachment associated with a particular agreement is listed here, along with a short description and the size of the file. As shown in Figure 16, the combined file name, description and file size constitute a link that allows users to open and view the attachment.

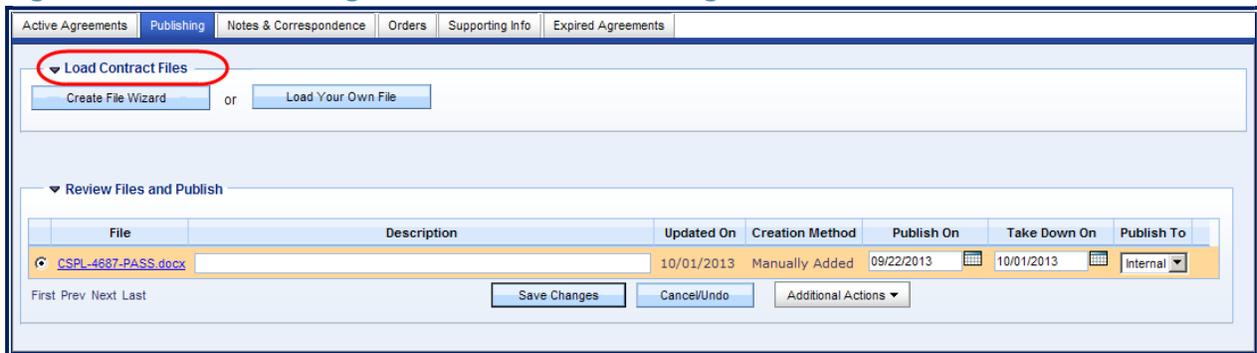
Figure 16: Expanded View of Attachments Section



PUBLISHING TAB

The **CONTRACT MANAGEMENT** screen Publishing tab houses the functionality that enables you to create or load Contract Summary files and publish them. As shown in Figure 17, the Publishing tab comprises two sections, the **LOAD CONTRACT FILES** section near the top of the screen, and the **REVIEW FILES AND PUBLISH** section below.

Figure 17: Contract Management Screen – Publishing Tab



For detailed information, see [Contract Publishing](#).

NOTES & CORRESPONDENCE TAB

The Notes & Correspondence tab provides an accessible location for keeping track of vendor communications and other information pertinent to an agreement. Figure 18 shows the Notes & Correspondence tab before any user input has been added. Click the appropriate Insert button to add an entry under Vendor Correspondence or Notes.

Figure 18: Notes & Correspondence Tab Overview

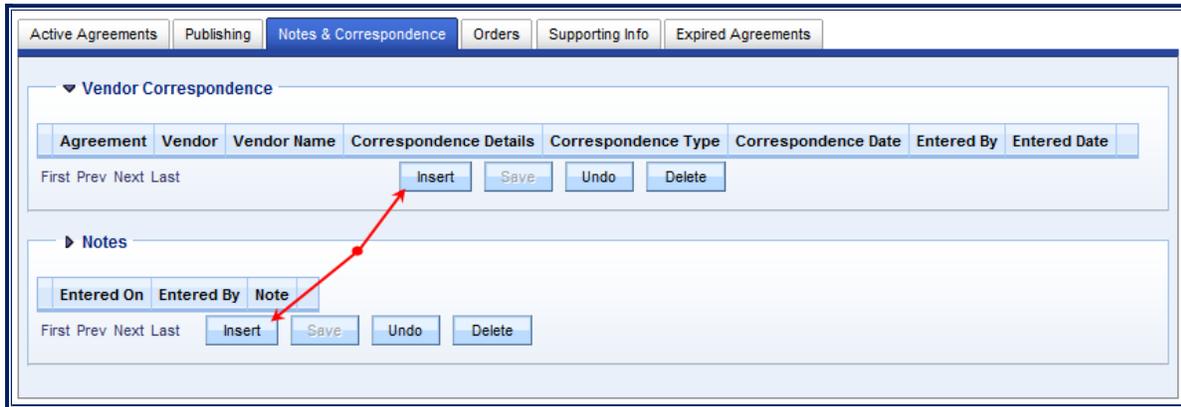
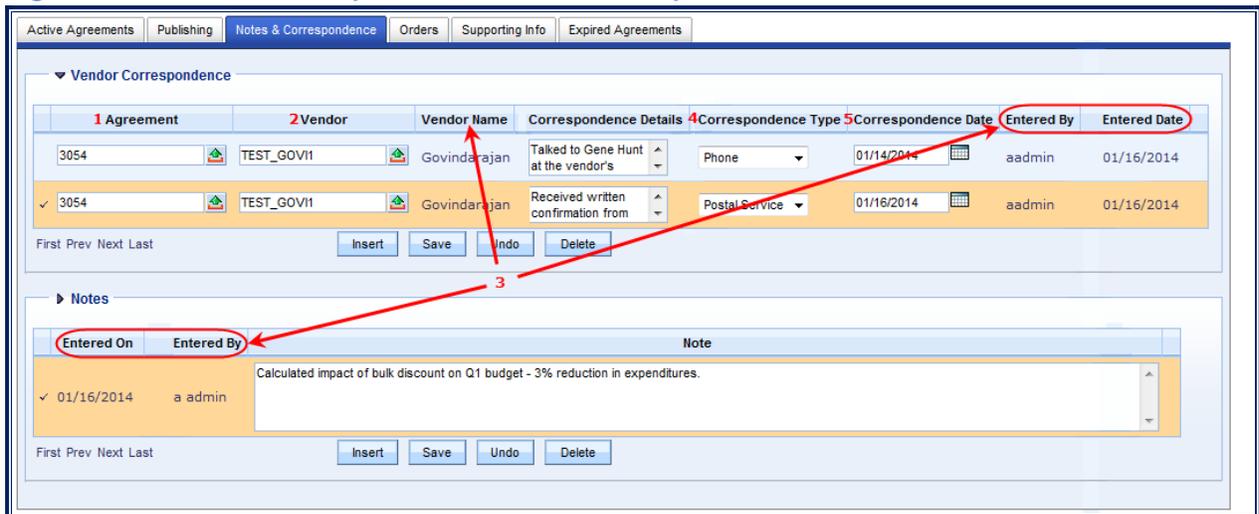


Figure 19 shows the Notes & Correspondence tab as it will appear after data has been entered.

Figure 19: Notes & Correspondence Tab with Sample Data



1. **Agreement:** Select the applicable agreement number from the pick list. Only agreements for the current contract number are displayed.
2. **Vendor:** Select a vendor code from the pick list. Only vendors with agreements under the current contract number are displayed.
3. **Vendor Name, Entered By, and Entered On:** The system will populate these fields when a line is saved.
4. **Correspondence Type:** Select a value from the pick list to indicate the method of communication (telephone, email, etcetera).
5. **Correspondence Date:** Use the calendar icon or key in the date of the communication.



ORDERS TAB

The **Orders** tab allows you to access an embedded, public Logi report of orders against the current contract. This report can be run and displayed in several views, as shown below in Figure 20.

Figure 20: Orders Tab – Default View

The screenshot shows the 'Orders' tab interface with the following sections:

- 1 Contract Totals:** Dollars: **\$215,000**, Number of Orders: **1**
- 2 Current Term:** Dollars: **\$90,000**, Number of Orders: **1**
- 3 Term Breakdown:**
 - [BSO Breakdown](#)
 - [Agency Breakdown](#)
 - [Vendor Breakdown](#)
 - [Secretariat Breakdown](#)
- 4 Potential Orders (Current Term):**

ADVANCED PRINTING AND GRAPHICS - W9TEST (DC16377)		
Contract Number Used	Term Transaction	Term Dollars
None	1	\$2,000
	1	\$2,000

ELEMENTAL MICROANALYSIS LIMITED (DC632)		
Contract Number Used	Term Transaction	Term Dollars
	0	\$0

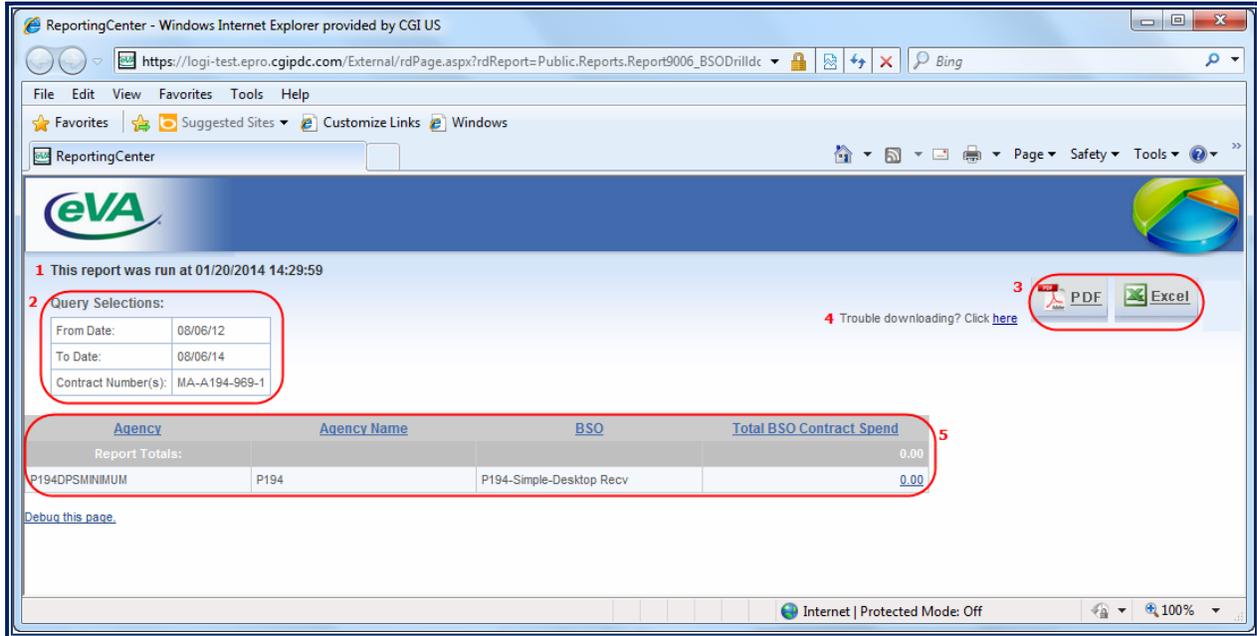
MUGLER'S - URL (DC12729)		
Contract Number Used	Term Transaction	Term Dollars
None	1	\$70,000
45-988	1	\$1,350
	2	\$71,350

- 1. Contract Totals:** Displays the total spent and the total number of orders from the contract start date to the current date.
- 2. Current Term:** Displays the total spent and the total number of orders from the start date of the current contract term to the current date.
- 3. Term Breakdown:** Displays a list of views from which the report can be generated. Each view on the list is an action link; click a link to generate the corresponding report.
- 4. Vendors:** Displays a list of vendors authorized under the contract, as well as the amount spent and the total amount allowed for each vendor.

REPORT EXAMPLE

Figure 21 shows an **eVA REPORTINGCENTER** screen with a report generated from the BSO Breakdown view. All reports generated from any of the views listed on the **Orders** tab will follow this format.

Figure 21: Example of Logi Report BSO Breakdown View



The screenshot shows a web browser window displaying the eVA ReportingCenter interface. The page title is "ReportingCenter - Windows Internet Explorer provided by CGI US". The URL is "https://logi-test.evro.cgipdc.com/External/rdPage.aspx?rdReport=Public.Reports.Report9006_BSOdrilldc". The page features the eVA logo and a navigation menu. The main content area displays a report generated on 01/20/2014 at 14:29:59. The report includes a "Query Selections" section with the following details:

From Date:	08/06/12
To Date:	08/06/14
Contract Number(s):	MA-A194-969-1

Below the query selections, there are option buttons for "PDF" and "Excel", a link for "Trouble downloading? Click here", and a table of report results. The table has the following columns: Agency, Agency Name, BSO, and Total BSO Contract Spend. The report results are as follows:

Agency	Agency Name	BSO	Total BSO Contract Spend
Report Totals:			0.00
P194DPSMINIMUM	P194	P194-Simple-Desktop Recv	0.00

The page also includes a "Debug this page" link and a footer with "Internet | Protected Mode: Off" and a zoom level of 100%.

- 1. Timestamp:** Displays the date and time the report was run.
- 2. Query Selections:** Shows the constraints on the query that produced the report; in this case, the From Date, the To Date, and the Contract Number.
- 3. Option Buttons:** Enables you to view and download Spend reports in .pdf and Excel formats.
- 4. Trouble Downloading?:** Links to a document that explains how to add a trusted site to Internet Explorer. If you are trying to download a report as a .pdf or Excel file, and it is taking an unusually long time, your browser settings might be to blame. Following these instructions can shorten your download times by as much as 50 percent.
- 5. Report Results:** Displays results for the selected report in table format.

SUPPORTING INFO TAB

The Supporting Info tab provides one location to organize and store supporting data for each agreement within the Contract Management module. Figure 22 provides an overview of the Supporting Info tab as it appears before data is entered.

 **REMEMBER:** Where it is available, click the **Insert** button to add a record under a particular section.

Figure 22: Supporting Info Tab – No Data

The screenshot shows the 'Supporting Info' tab with several sections, each containing an empty table and action buttons:

- Bid Deposits:** Table with columns: Award, Vendor, Deposit Amount, Type of Deposit, Bank/MO Company, Check/Money Order#, Received On, Returned On, Comments. Buttons: Insert, Save, Delete, Undo.
- Bonds:** Table with columns: Award, Vendor, Bond #, Bond Company, Bond Amount, Bond Type, Received On, Released On, Expires On. Buttons: Insert, Save, Delete, Undo.
- Re-Assignment:** Table with columns: Assignment, Assignor Co Name, Assignee Co Name, Assignment Date. Button: View Details/Update information.
- Liquidated Damages:** Table with columns: Agreement, Vendor, LQ Damages Amount, Date, Reason, Comment. Buttons: Insert, Save, Delete, Undo.
- Insurance Certificates:** Table with columns: Agreement, Cert #, Provider Name, Date Issued. Button: View Details/Update information.
- Warranty:** Table with columns: Agreement, Vendor, Warranty Number, Warranty Type, Commodity Line, Commodity, Effective From, Effective To, Comments. Buttons: Insert, Save, Delete, Undo.

BID DEPOSITS

For contracts that require bid deposits; this subsection is available to record details of each deposit, including bank information and date received and returned (Figure 23). Use the action buttons to insert, save, and delete lines, or to undo changes that have not been saved.

Figure 23: Bid Deposits Subsection

The screenshot shows the 'Bid Deposits' subsection with a table containing one record:

Award	Vendor	Deposit Amount	Type of Deposit	Bank/MO Company	Check/Money Order#	Received On	Returned On	Comments
3060	CSPL 2312	\$1,500.00	Check	Wells Fargo	1783	11/11/2013	1/11/2013	

Buttons: Insert, Save, Delete, Undo.

BONDS

For contracts that require vendors to be bonded; as shown in Figure 24, this subsection lets you record details of each bond, including the bond company and type, and the dates the bond is received and released. Use the action buttons to insert, save, and delete lines, or to undo changes that have not been saved.

Figure 24: Bonds Subsection

Award	Vendor	Bond #	Bond Company	Bond Amount	Bond Type	Received On	Released On	Expires On
3060	CSPL 2312	123	Acme Bonds	\$5,000.00	Payment Bond	01/15/2014		01/15/2015

RE-ASSIGNMENT

For contracts that carry assignments; as shown in Figure 25, the Re-Assignment subsection displays, in list format, basic information regarding assignments made under the contract.

Figure 25: Re-Assignment Subsection

Assignment	Assignor Co Name	Assignee Co Name	Assignment Date

Click View Details/Update Information to access the **CONTRACT ASSIGNMENT** screen, where complete details can be recorded and saved. The assignment and the names of the Assignor and Assignee companies will then be displayed on the **CONTRACT MANAGEMENT** screen, along with the Assignment Date.

LIQUIDATED DAMAGES

For contracts that require tracking of damages; as shown in Figure 26, this subsection lets you record pertinent information regarding liquidated damages under the agreement. Fields are provided to enter the reason for the liquidation and for additional comments. Use the action buttons to insert, save, and delete lines, or to undo changes that have not been saved.

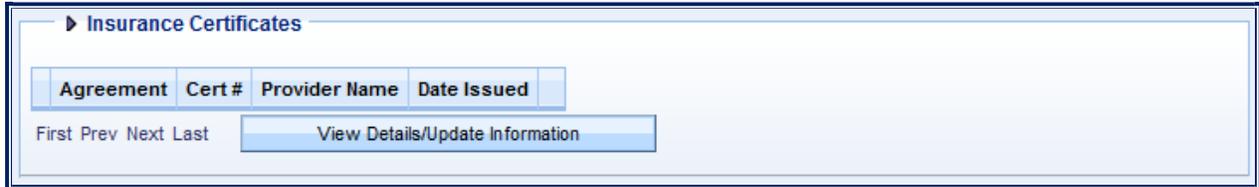
Figure 26: Liquidated Damages Subsection

Agreement	Vendor	LQ Damages Amount	Date	Reason	Comment
3055	NOTV 1	\$15,000.00	01/15/2014		

INSURANCE CERTIFICATES

For contracts that require any type of insurance; as shown in Figure 27, the Insurance Certificates subsection displays, in list format, basic information regarding each certificate.

Figure 27: Insurance Certificates Subsection

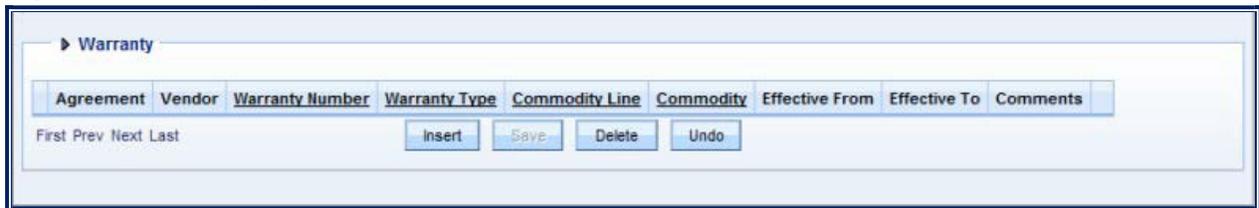


Click View Details/Update Information to access the **INSURANCE CERTIFICATES** screen, where complete details can be recorded and saved. The agreement, certificate number, name of the provider and issue date will then be displayed on the **CONTRACT MANAGEMENT** screen.

WARRANTY

Warranty information that is added in this subsection will populate to the Warranty table. The reverse is also true; warranty information that is added to the Warranty table will be visible here on the Supporting Info tab.

Figure 28: Warranty Subsection

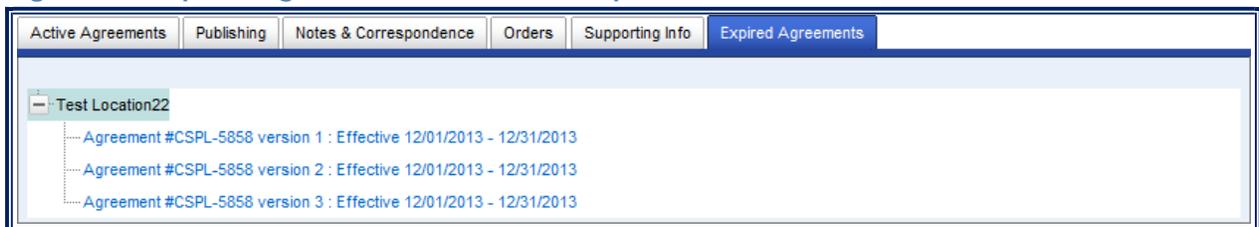


Click Insert to add a line, then enter the pertinent warranty information and click Save.

EXPIRED AGREEMENTS TAB

The last tab on the **CONTRACT MANAGEMENT** screen, the **Expired Agreements** tab (Figure 29), displays a tree view of agreements that have reached their effective end date. The information will be organized by Vendor Name and then by Agreement ID and version.

Figure 29: Expired Agreements Tab with Sample Data



CONTRACT PUBLISHING

If the agency/entity for which you purchase has a Web site (internal or external) to publish your contracts, you can use the Contract Management Publishing tab options described in this section.

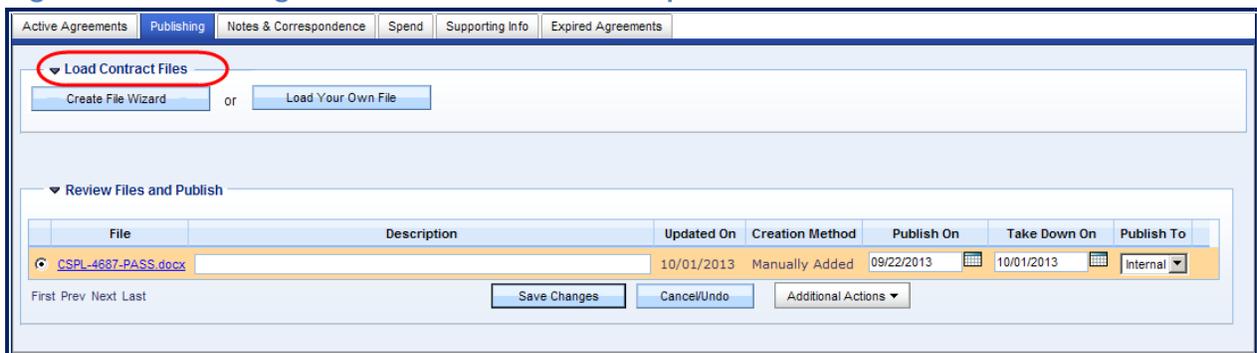
SOURCING & CONTRACTING

The Contract Management module has greatly simplified the process for publishing Contract Summary files. Contract Summaries can be generated or uploaded and scheduled for publication from the Contract Management Module in Sourcing & Contracting. This functionality resides on the Publishing tab of the **CONTRACT MANAGEMENT** screen.

LOADING CONTRACT FILES

As shown in Figure 30, the Load Contract Files section is located near the top of the Publishing Tab.

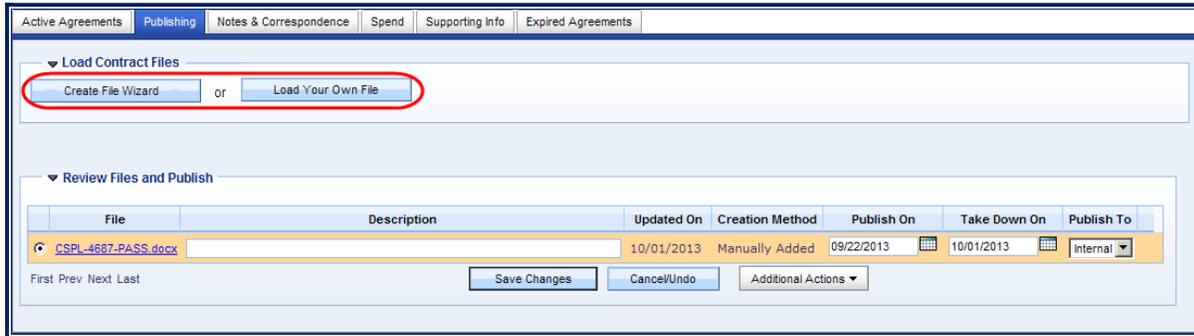
Figure 30: Publishing Tab – Load Contract Files Options



There are two methods of loading a Contract Summary file (Figure 31):

- You can access the **Create File Wizard** to create a Contract Summary document by selecting a template and options, or
- You can opt to **Load Your Own File**, that is, upload files that have been created outside of eVA and stored on a workstation or server.

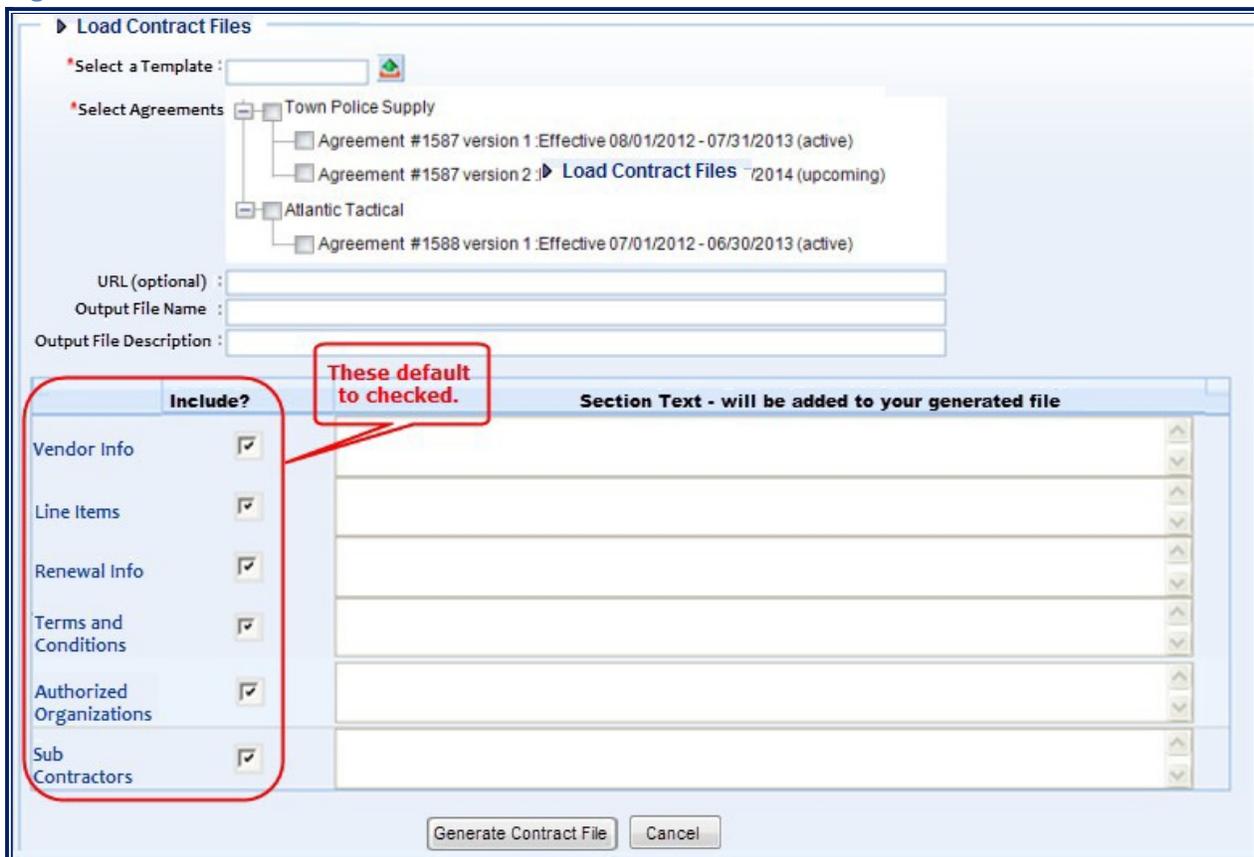
Figure 31: Create or Load Contract Summary Files



USING THE CREATE FILE WIZARD

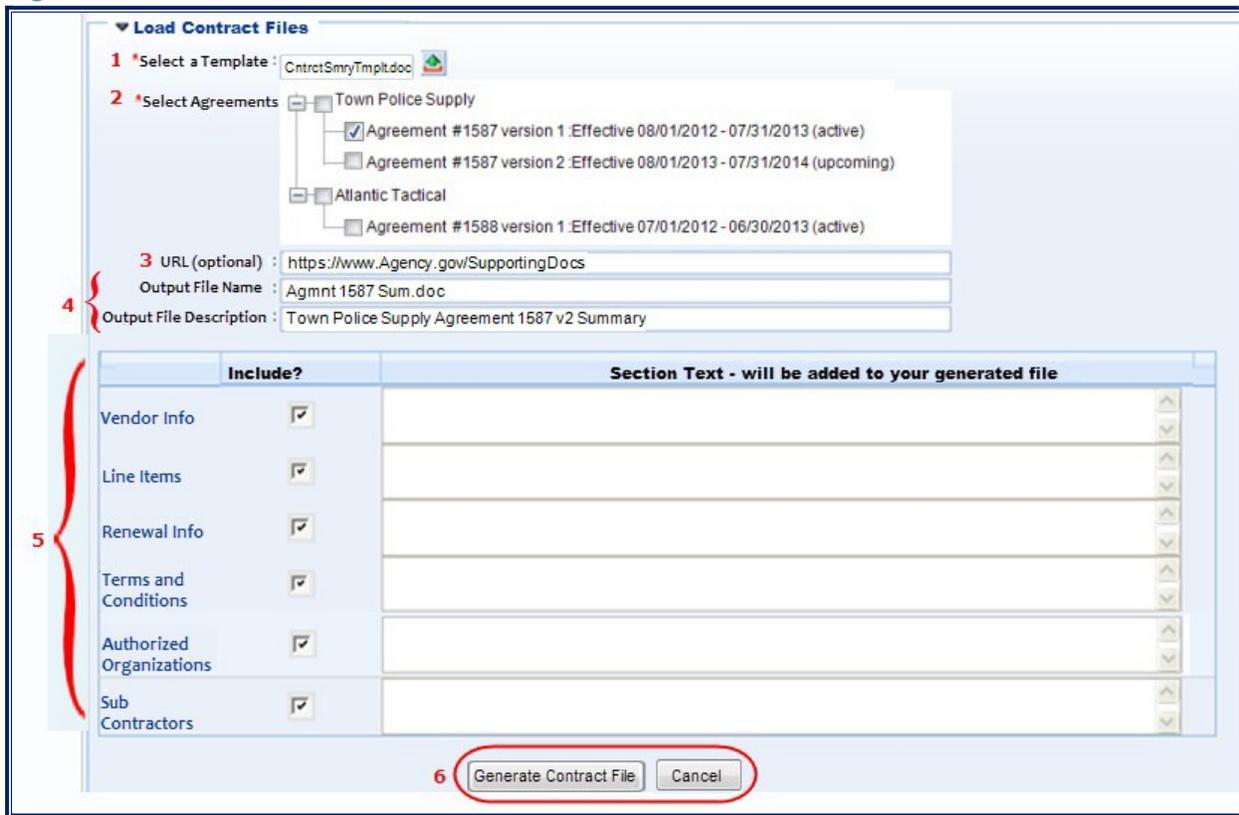
To create a Contract Summary document using the built-in wizard, click Create File Wizard. The Load Contract Files section will be displayed, replacing the Create File Wizard and the Load Your Own File buttons. All fields will be empty except the check boxes in the “Include?” column, which are checked by default (Figure 32).

Figure 32: Create Contract Files Section



An example of the completed form is provided in Figure 33, below.

Figure 33: Create Contract Files Section with Data



Load Contract Files

1 *Select a Template : CntrctSmryTmppt.doc

2 *Select Agreements

- Town Police Supply
 - Agreement #1587 version 1 :Effective 08/01/2012 - 07/31/2013 (active)
 - Agreement #1587 version 2 :Effective 08/01/2013 - 07/31/2014 (upcoming)
- Atlantic Tactical
 - Agreement #1588 version 1 :Effective 07/01/2012 - 06/30/2013 (active)

3 URL (optional) : https://www.Agency.gov/SupportingDocs

4 Output File Name : Agmnt 1587 Sum.doc

Output File Description : Town Police Supply Agreement 1587 v2 Summary

	Include?	Section Text - will be added to your generated file
Vendor Info	<input checked="" type="checkbox"/>	
Line Items	<input checked="" type="checkbox"/>	
Renewal Info	<input checked="" type="checkbox"/>	
Terms and Conditions	<input checked="" type="checkbox"/>	
Authorized Organizations	<input checked="" type="checkbox"/>	
Sub Contractors	<input checked="" type="checkbox"/>	

6 Generate Contract File Cancel

- 1. Select a Template:** Choose a Contract Summary template from the pick list. This is a required field; the system will return an error message if you try to generate the summary file without selecting a template.
- 2. Select Agreements:** Choose the agreement or agreements to be included in the Contract Summary file. This is also a required field.
 - By default, the list of agreements is expanded to show all entries. Click the minus signs to collapse sections as needed.
 - To select all agreements for a particular vendor, click the check box next to that vendor's name. If there are multiple versions of an agreement (same contract number), only one version of that agreement can be selected.
- 3. URL:** You have the option to specify a URL that will be included in the generated contract file to provide a link to external content. Enter the complete URL, beginning with either *http://* or *https://*.
- 4. Output File Name and Output File Description:** You can choose to specify a name for your Contract Summary file. You can also choose to enter a short description, which is especially helpful if your agency/entity uses only numeric designations for Contract Summary files.
 - If you do not specify a name for the output file, the system will assign a file name by combining the department code and contract number.
 - When more than one contract is selected, the first contract number in the list will be used in the file name.

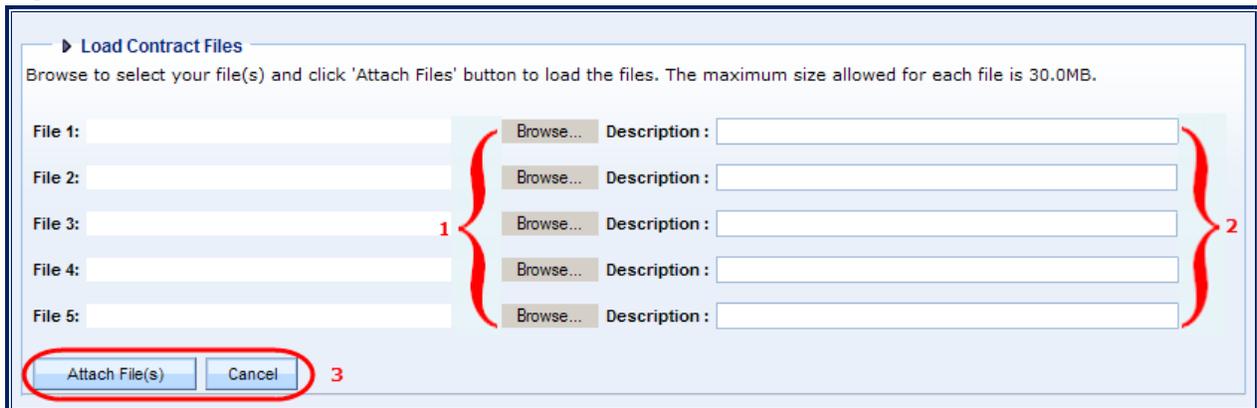
5. **Section Choices and Text:** This section allows you to specify which sections of the agreement to include in the generated Contract Summary file.
 - By default, all sections are checked for inclusion in the contract file.
 - Space is provided to enter text to be inserted at the beginning of each section.
6. **Generate Contract File and Cancel Buttons:** These standard action buttons allow you to generate a Contract Summary file using the options you selected, or to close the wizard and return to the original view of the Publishing tab (Figure 17).
 - If you choose Cancel, the selections and text you entered will not be saved.

USING THE “LOAD YOUR OWN FILE” OPTION

To upload one or more files that have been created outside of Sourcing & Contracting, go to the Publishing tab and click Load Your Own File (Figure 31). The **LOAD CONTRACT FILES** section will be displayed (Figure 34). The mechanics of this section will be familiar to most users:

1. Click the Browse button for File 1 to open the Choose File to Upload dialog box, and then locate the correct file. You can select up to five files, browsing for each individually.
2. Add a short description (optional).
3. Click Attach File(s) to load the selected documents, or click Cancel to return to the original view of the Publishing tab without attaching any files.

Figure 34: Load Contract Files Screen



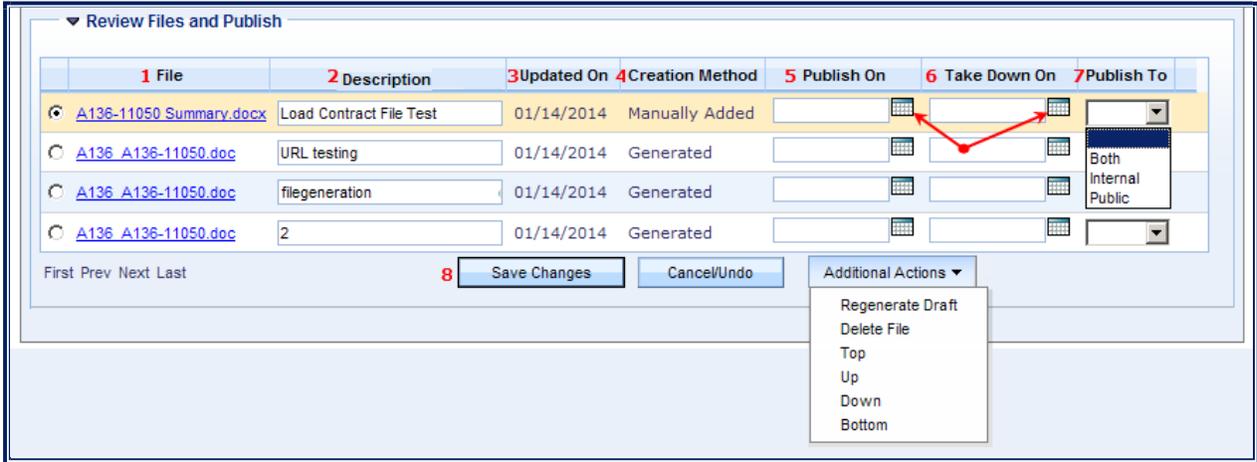
PUBLISHING A CONTRACT SUMMARY

In addition to improving contract summary authoring capabilities, the Contract Management module has simplified the procedure for meeting the mandatory publishing requirement. As a buyer, you no longer need to manually post Contract Summary documents to the Virginia State Contracts list if doing so. Two automated reports have been developed, a Public report and an Internal/Buyer report.

When you generate a Contract Summary document, you will also enter Publish On and Take-Down dates. The documents include contract summaries in accordance with their selection criteria Publish To value plus Effective Date range.

When you add one or more Contract Summary files (either by using the wizard to create a summary file or by attaching an existing summary file), certain information about each file will be displayed automatically in the Review Files and Publish section of the Publishing tab (Figure 35).

Figure 35: Set Up Contract Summary for Publishing



1 File	2 Description	3 Updated On	4 Creation Method	5 Publish On	6 Take Down On	7 Publish To
A136-11050_Summary.docx	Load Contract File Test	01/14/2014	Manually Added	<input type="text"/>	<input type="text"/>	<input type="text"/>
A136_A136-11050.doc	URL testing	01/14/2014	Generated	<input type="text"/>	<input type="text"/>	Both
A136_A136-11050.doc	filegeneration	01/14/2014	Generated	<input type="text"/>	<input type="text"/>	Internal
A136_A136-11050.doc	2	01/14/2014	Generated	<input type="text"/>	<input type="text"/>	Public

Additional Actions:

- Regenerate Draft
- Delete File
- Top
- Up
- Down
- Bottom

- File:** The name of the file appears here as a link. To review a file, click the link; you will be offered a choice of opening the file or saving it to your workstation.
- Description:** The short description you entered when you created/loaded the contract file will appear here. If you did not enter a description previously, you can do so now, or you can make changes to one you entered before.
- Updated On:** This system-maintained field shows the date the file was created or modified.
- Creation Method:** Also system-maintained, this field shows whether the file was uploaded manually or generated with the Create File Wizard.
- Publish On:** The date entered here (either with the calendar tool or keyed in) represents the first day the Contract Summary file will be available to be published in the Logi report.
- Take Down On:** The date entered here (either with the calendar tool or keyed in) represents the last day the Contract Summary file will be available for publication in the Logi reports. It is important to remember that the document will be viewable until 11:59 p.m. on the selected date, so for practical purposes, the **actual take-down occurs at midnight on the day after** the date you choose.
- Publish To:** Use this drop-down list to indicate whether the summary is to be published internally, publicly, or both. *Public* can be used by agencies/entities with a public facing report (similar to the State Contract List). *Internal* can be set up by agencies/entities to point to an internet address of their choosing.
- Action Buttons:** In addition to the standard Save Changes and Cancel/Undo buttons, the Additional Actions button provides a menu of more actions that can be performed on a selected Contract Summary file.



CONTRACT SUMMARY TEMPLATES

To generate a Contract Summary file, you must have access to a Contract Summary template. Templates are created outside of Sourcing & Contracting using the mail merge capabilities of Microsoft (MS) Office.

A basic mail merge combines a data source and a form letter to create a set of personalized letters. The same principle is employed to generate a Contract Summary file in eVA, with one or more agreements serving as the data source and a Contract Summary template instead of the form letter.

A Contract Summary template consists of:

- Standard boilerplate information (text, images, watermarks, etcetera,) that prints on all Contract Summaries based on that template, and
- Data-mapping points (merge fields) that are replaced with contract data when the Contract Summary file is generated.

A template can be created using any version of MS Word from Word 97 to Word 2016 (document formats *.doc* and *.docx*).

TEMPLATE DESIGN

Template creation and maintenance is left to each agency/entity to manage based on their individual needs; at a minimum, one individual per agency/entity should be trained in template design and maintenance. A basic template, *CM Template*, is available in eVA for general use. It can also be downloaded and used as a model for additional templates.

Template designers can access a list of available merge fields maintained within the application. The list includes the merge field names and the corresponding database and column information, allowing template designers to use Business Names as data mapping points instead of database table and column names. In addition, eVA makes this information available to template designers in spreadsheet format.

Figure 36 shows a snippet of a Contract Summary template. For purposes of clarity, the standard text (that will appear on all summaries generated from this template) is shown in black and the data mapping points, set off by double angle brackets, are in blue. The printed text that would result when a contract is merged with this template is also shown, using the same color conventions.

Figure 36: Sample of Template and Summary Document

Template Sample of Vendor and Agreement Information:

<<LGL_NM>>

Agreement # <<DOC_ID>> version <<DOC_VERS_NO>> : Effective <<EFBGN_DT>> - <<EFEND_DT>> (<<AGREEMENT_STATUS>>)

Result:

Town Police Supply

Agreement #1587 version 1 : Effective 08/01/2012 – 07/31/2013 (active)

Agreement #1587 version 2 : Effective 08/01/2013 – 07/31/2014 (upcoming)

TEMPLATE VALIDATION

It is important to remember that, due to the fact that templates are established outside of Sourcing & Contracting, **there are no built-in edits or validations** to ensure the data tables and merge fields are set up properly. To mitigate any potential risk, **it is strongly recommended that each agency/entity establish a best practice of validating templates in a non-production environment (UAT or Training) before releasing them to Production.**

TEMPLATE MAINTENANCE SCREEN

The **TEMPLATE MAINTENANCE** screen is accessed from **PAGE SEARCH**, as shown in Figure 37.

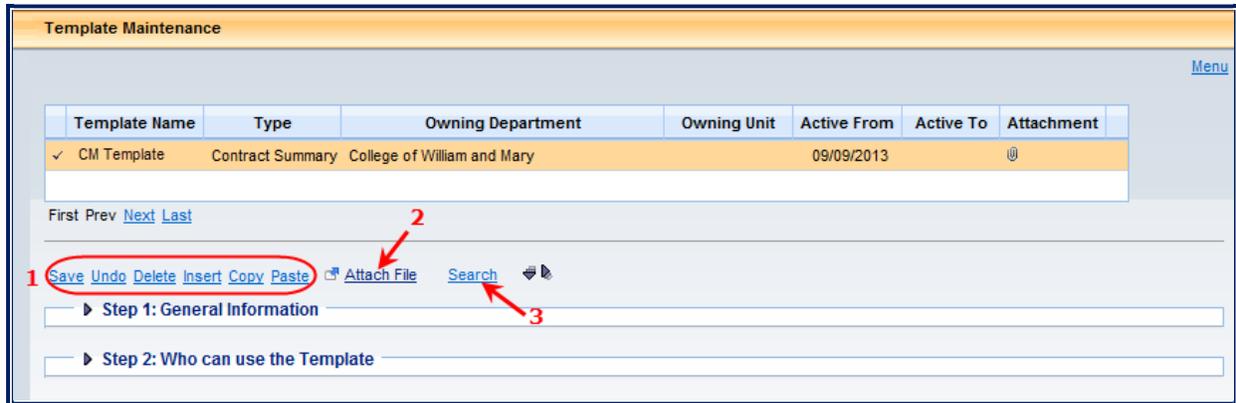
Figure 37: Accessing the Template Maintenance Screen

The screenshot shows the eVA Page Search interface. On the left, a navigation menu includes 'My Shortcuts', 'Search', 'Page Search' (highlighted with a red arrow), 'Document Catalog', 'Report Search', 'History', 'Administration', and 'Message Center'. The main content area is titled 'Page Search' and contains several search filters: 'Category' (dropdown), 'Page Type' (dropdown), 'Description' (text input), and 'Page Code' (text input containing 'TMPLMNT*', which is circled in red). Below these filters are 'Browse' and 'Clear' links. At the bottom, there is a table with two columns: 'Description' and 'Page Code'. The table contains one entry: 'Template Maintenance' with page code 'TMPLMNT'. Below the table are navigation links: 'First', 'Prev', 'Next', 'Last', and 'Open With Data'.

The **TEMPLATE MAINTENANCE** screen (Figure 38) enables users to load contract templates to Sourcing & Contracting as attachments. Templates loaded in the **TEMPLATE MAINTENANCE** screen are available for use on the Publishing tab of the **CONTRACT MANAGEMENT** screen.

The screen comprises three sections: first, a listing of all templates that have been loaded for use; next, a section to enter or display general information for each template; and, last, a section in which access and restrictions are defined for each template.

Figure 38: Template Maintenance Screen



1. **Action Links:** Use these links to add, remove, and update lines on the template list. You can also select an existing line, then copy and paste it. Remember, once you have saved a line, you cannot change it with the Undo action; you must use Delete, instead.
2. **Attach File:** Click this link to go to the **TEMPLATE ATTACHMENT** screen (Figure 41).
3. **Search:** Click to open the Search dialog box to search for a template. In addition to searching for a specific template, you can also search for all templates that belong to a particular department or unit.

STEP 1: GENERAL INFORMATION

Figure 39 shows the General Information section of the **TEMPLATE MAINTENANCE** screen after data has been added but before it has been saved.

To add general information for a new template, click Insert. Complete all required fields: Template Name, Type, and Owning Department; and enter an Active From date. You have the option to also add a description of the template, to indicate the unit that owns it, and to enter an Active To date, after which the template will no longer be available for Contract Summary generation.

Figure 39: Template Maintenance Screen – General Information

▼ Step 1: General Information

*Template Name : Created On :

Description : Created By :

*Type : Last Modified On :

*Owning Department : Virginia Information Technology Agency - E2E Last Modified By :

Owning Unit : A136 Unit 1 2013

*Active From :

Active To :

STEP 2: WHO CAN USE THE TEMPLATE

As shown in Figure 40, this section lets you control access to each template. Use the Department drop-down list to select *All Agencies*, *All Local Agencies*, or *All State Agencies* to allow the selected set to access the current template; **or** select *Choose From Pick List* and then choose the appropriate codes from the Department Code pick list and also from the Unit pick list, if applicable. If you select a Department Code and leave the Unit field empty, all units in the department will have access to that template.

You can use more than one line per template to define access. For example, on the first line, you might select *All Local Agencies*, and then add more lines to give access to specific state departments or units, as well.

Note that you can restrict access of any department or agency by checking the **Exclude this Organization** check box located at the far right side of the appropriate line. This option can only be applied to specified departments or units; the Exclude check box will be active only when the Department value is *Choose From Pick List*.

Figure 40: Template Maintenance Screen – Template Access

▼ Step 2: Who can use the Template

Department	Department Code	Department Name	Unit	Unit Name	Exclude this Organization
Choose From Pick	A136	Virginia Information Technology Agency - E2E	L002	L002 For Test	<input type="checkbox"/>
Choose From Pick					<input type="checkbox"/>
All Agencies	A222	A222OCCA	A01	A222OCCA	<input type="checkbox"/>
All Local Agencies					<input type="checkbox"/>
Choose From Pick	A136	Virginia Information Technology Agency - E2E	L003	L3 Unit A136	<input type="checkbox"/>
All State Agencies					<input type="checkbox"/>
Choose From Pick	A136	Virginia Information Technology Agency - E2E	L001	L001 For Test	<input type="checkbox"/>
✓ Choose From Pick	A204	College of William and Mary			<input type="checkbox"/>

Save Undo Delete Insert Copy Paste First Prev Next Last

ATTACHING A TEMPLATE

Make sure the correct line is selected on the **TEMPLATE MAINTENANCE** screen, then click **Attach File** to open the **TEMPLATE ATTACHMENT** screen. Click the **Add Attachment** button, then browse for your template file. Select the file and click **Upload** to add it to Sourcing & Contracting.

The system is designed to accept only one attachment per line; you cannot accidentally overwrite an existing template. As noted on the **TEMPLATE ATTACHMENT** screen (Figure 41), if you want to load an updated version of a particular template, you must first delete the existing version.

Figure 41: Template Attachment Screen





CONTACT INFORMATION

If, as you work through this guide, you find you have additional questions about the Contract Management module, please feel free to contact the eVA Customer Care team for assistance.

HOW TO CONTACT US

- By phone: Call eVA Customer Care at (866) 289-7367.
- By email: Send an email to eVACustomerCare@dgs.virginia.gov.
- Hours: Monday through Friday, 8:00 am to 4:45 pm, except major holidays.

THE eVA CUSTOMER CARE TEAM

Our team is dedicated to providing quality support and service to each customer. If at any time you have concerns about our customer service or about getting your issue resolved, please call the eVA Customer Care Manager, Ghania Matias, at 804-371-2413.