Contract Maintenance Instructions

April 26, 2013
Updated October 29, 2015

Kansas Department for Aging and Disability Services

Contract Maintenance

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General Instructions

Overview

Contract Maintenance is a secure web application developed for KDADS employees to initiate contracts using standardized templates developed by the KDADS Central Office Legal Division.

Since most contracts are accompanied by a Purchase Order, the Contract Maintenance maximizes the Vendor listing from the KDADS Purchasing system. If a new Contractor/Vendor is being used in a contract, the procurement unit can automatically add the new vendor to the Purchasing system within Contract Maintenance.

When the Contracts application is first launched, the Contracts List displays. This list contains all KDADS Contracts, Amendments, Grants, and Memorandums of Understanding (MOU). The list is color-coded to highlight contracts expiring within 90 days (green) and within 60 days (red).

The Contract Maintenance application utilizes an approval workflow that electronically routes contracts through different KDADS Commissions and Divisions. The application also utilizes electronic signatures for all parties of the contract.

In the event that an outside party is unable to access the application to sign electronically, an 'Off System' signature process allows signatures to be obtained manually on a printed copy of the contract.

In this document, the term “contract” is used to indicate any of the Agreement Types (templates) available in the application.

Contact Persons

Issue	Contact Person
Application 'How to' Questions Password Changes	KDADS Help Desk **Phone:** (785) 296-4987 or (800) 432-3535 **E-Mail:** HelpDesk@kdads.ks.gov
Questions about Contracts Policies and Guidelines	Diane Slover KDADS Central Office Legal Division **Phone:** (785) 296-5831 **Email:** Diane.Slover@kdads.ks.gov
Web Application Hours of Availability	Every day from 2:30am - 10:30pm (offline for maintenance from 10:30pm – 2:30am)

Accessing the Application

Introduction

Use Microsoft Internet Explorer or Mozilla Firefox to access the KDADS web application site. Supported browser types and versions may change as Web Applications updates are deployed and new browser versions are made available. All KDADS Web Applications are secured and encrypted.

How to

Follow the steps in the table below to access the login page for KDADS Web Applications.

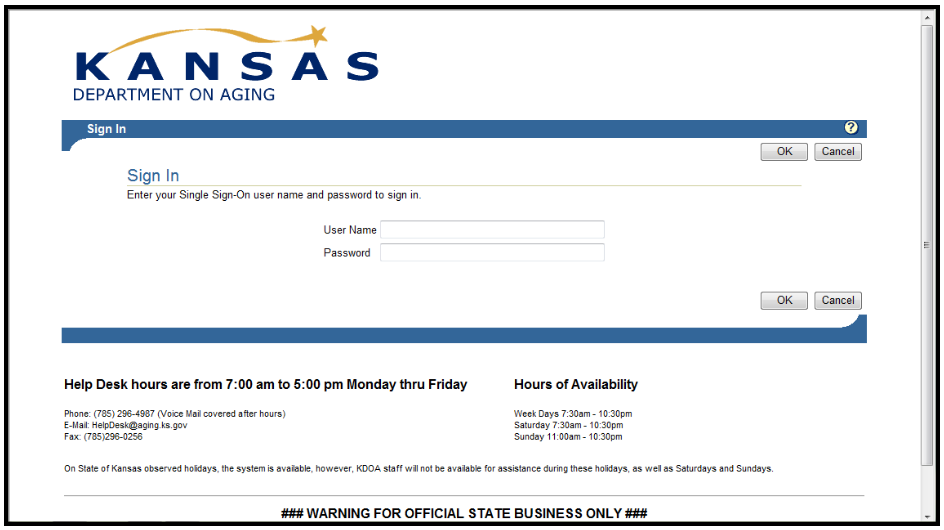
Step	Action	Result
1.	Open Internet Explorer or Firefox. Go to the KDADS Provider Information Resource Web Site at www.aging.ks.gov	The KDADS Provider Information Resource Website home page displays.

Step	Action	Result
2.	Click on the blue **Web Applications** button under “Application Links:” on the right side of the home page.	The KDADS Web Application Sign In page displays.

Logging In

How to Follow the steps in the table below to complete the Login process.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1.</td><td>The KDADS Web Applications Sign In page is displayed

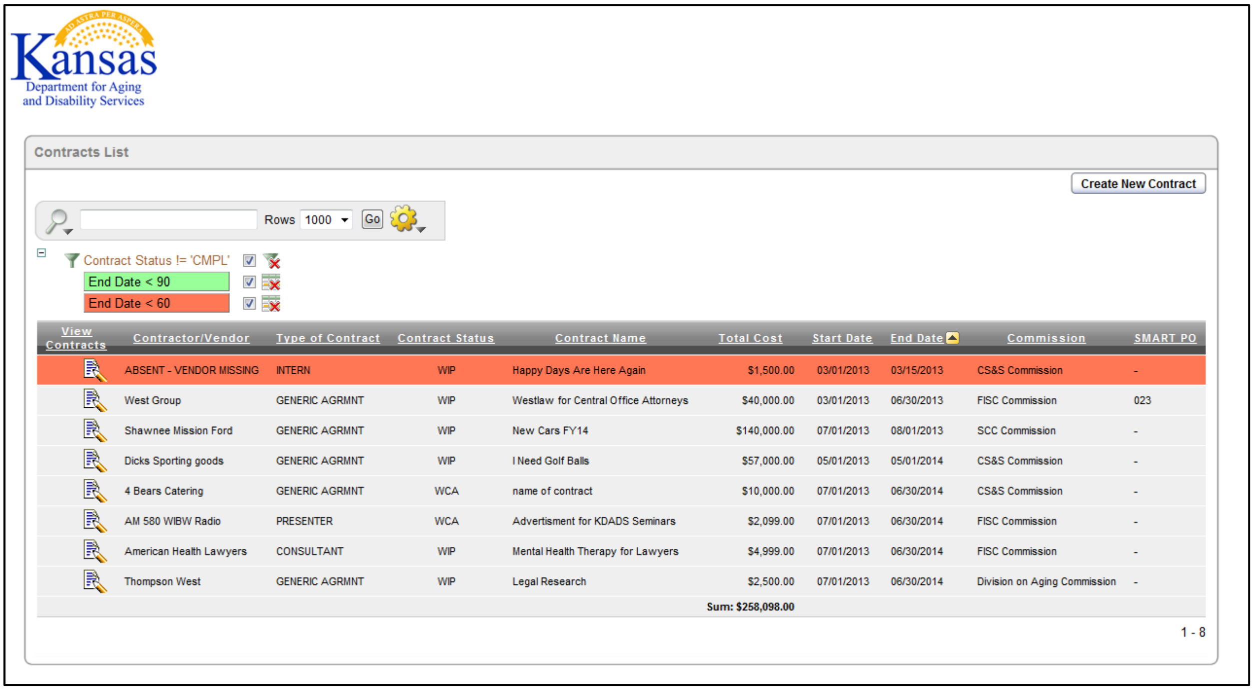
Type the User Name and press the Tab key on the keyboard.</td><td>The user name appears and the insertion point advances to the password field.</td></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>2.</td><td>Enter the Password. If it is the first time signing into Web Applications, use the initial password that was provided by the KDADS Computer Help Desk.

Click the OK button (either one)</td><td>The Web Application Home page displays.</td></tr>
</table>

Accessing the Contracts Initiation and Maintenance Application

How to Follow the steps in the table below to access the **Contracts Initiation and Maintenance** (referred to hereinafter as 'Contracts' or 'Contracts Maintenance') application.

Step	Action	Result
1.	From the Web Applications Home Page, click on the **Contracts** button. 	The main Contracts page (Contracts List) displays.



View Contracts	Contractor/Vendor	Type of Contract	Contract Status	Contract Name	Total Cost	Start Date	End Date	Commission	SMART PO
	ABSENT - VENDOR MISSING	INTERN	WIP	Happy Days Are Here Again	$1,500.00	03/01/2013	03/15/2013	CS&S Commission	-
	West Group	GENERIC AGRMNT	WIP	Westlaw for Central Office Attorneys	$40,000.00	03/01/2013	06/30/2013	FISC Commission	023
	Shawnee Mission Ford	GENERIC AGRMNT	WIP	New Cars FY14	$140,000.00	07/01/2013	08/01/2013	SCC Commission	-
	Dicks Sporting goods	GENERIC AGRMNT	WIP	I Need Golf Balls	$57,000.00	05/01/2013	05/01/2014	CS&S Commission	-
	4 Bears Catering	GENERIC AGRMNT	WCA	name of contract	$10,000.00	07/01/2013	06/30/2014	CS&S Commission	-
	AM 580 WIBW Radio	PRESENTER	WCA	Advertisment for KDADS Seminars	$2,099.00	07/01/2013	06/30/2014	FISC Commission	-
	American Health Lawyers	CONSULTANT	WIP	Mental Health Therapy for Lawyers	$4,999.00	07/01/2013	06/30/2014	FISC Commission	-
	Thompson West	GENERIC AGRMNT	WIP	Legal Research	$2,500.00	07/01/2013	06/30/2014	Division on Aging Commission	-
					Sum: $258,098.00				

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Contracts List Page

Introduction

The Contracts List page is where all contracts are listed. The list is in an Interactive Report format, which gives the user a table view, and allows the user to utilize filters and other reporting tools to create custom views of the data. Complete instructions for using the Contracts List interactive report are covered later in this manual.

The Contracts List uses color-coding to highlight a contract that is close to expiring.

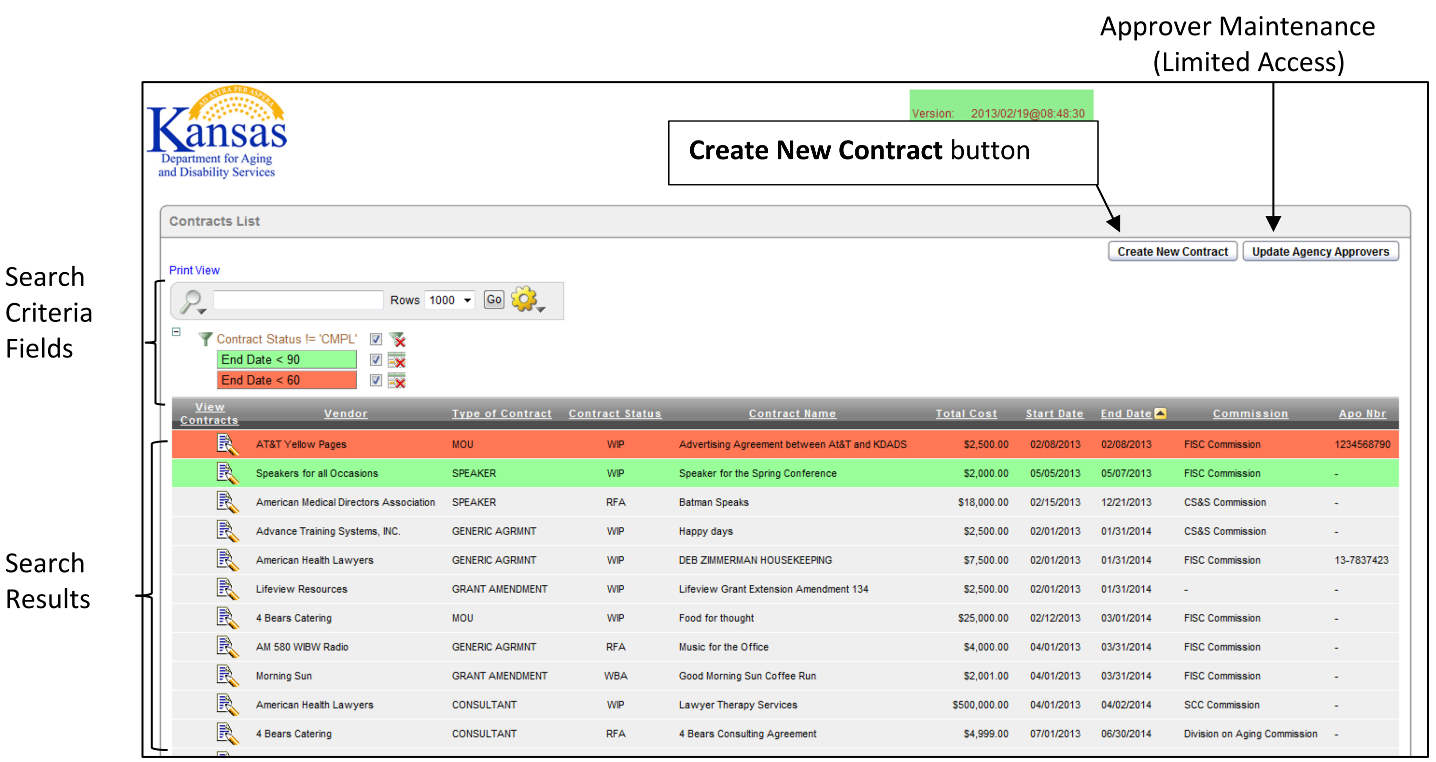
- Green indicates the contract will expire in less than 90 days
- Red indicates the contract will expire in less than 60 days

Quick Steps to select information:

- Click on the pencil/paper icon under the View Contracts column to open the contract. The Contract Detail Entry page displays.
- Click on any column heading to sort or filter the list contents.

Any new contract is created using the **Create New Contract** button found on the Contracts List page.

Limited users will have the **Update Agency Approvers** button. This feature is covered later in this manual.

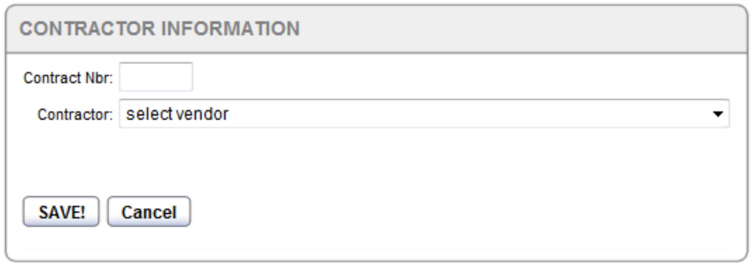


View Contracts	Vendor	Type of Contract	Contract Status	Contract Name	Total Cost	Start Date	End Date	Commission	Apo Nbr
	AT&T Yellow Pages	MOU	WIP	Advertising Agreement between At&T and KDADS	$2,500.00	02/08/2013	02/08/2013	FISC Commission	1234568790
	Speakers for all Occasions	SPEAKER	WIP	Speaker for the Spring Conference	$2,000.00	05/05/2013	05/07/2013	FISC Commission	-
	American Medical Directors Association	SPEAKER	RFA	Batman Speaks	$18,000.00	02/15/2013	12/21/2013	CS&S Commission	-
	Advance Training Systems, INC.	GENERIC AGRMNT	WIP	Happy days	$2,500.00	02/01/2013	01/31/2014	CS&S Commission	-
	American Health Lawyers	GENERIC AGRMNT	WIP	DEB ZIMMERMAN HOUSEKEEPING	$7,500.00	02/01/2013	01/31/2014	FISC Commission	13-7837423
	Lifeview Resources	GRANT AMENDMENT	WIP	Lifeview Grant Extension Amendment 134	$2,500.00	02/01/2013	01/31/2014	-	-
	4 Bears Catering	MOU	WIP	Food for thought	$25,000.00	02/12/2013	03/01/2014	FISC Commission	-
	AM 580 WIBW Radio	GENERIC AGRMNT	RFA	Music for the Office	$4,000.00	04/01/2013	03/31/2014	FISC Commission	-
	Morning Sun	GRANT AMENDMENT	WBA	Good Morning Sun Coffee Run	$2,001.00	04/01/2013	03/31/2014	FISC Commission	-
	American Health Lawyers	CONSULTANT	WIP	Lawyer Therapy Services	$500,000.00	04/01/2013	04/02/2014	SCC Commission	-
	4 Bears Catering	CONSULTANT	RFA	4 Bears Consulting Agreement	$4,999.00	07/01/2013	06/30/2014	Division on Aging Commission	-

Creating a New Contract

How to Follow the steps in the table below to create a new contact.

Step	Action	Result
1.	Click on the **Create New Contract** button.	Contractor Information window is displayed.

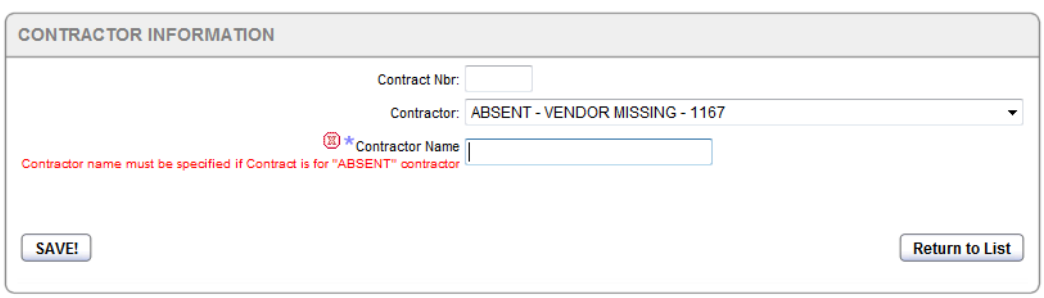


Step	Action	Result
2.	**Select the vendor** for the contract from the drop down list.	The list is generated from the KDADS Purchasing application.

<u>IMPORTANT</u>: If the vendor is not in the drop down list, select the ABSENT – VENDOR MISSING entry. Once the entry is verified by the Purchasing Division, it will be added to the list as a vendor for future use.

Step	Action	Result
3.	Click on the **SAVE!** button	One of two situations will occur:

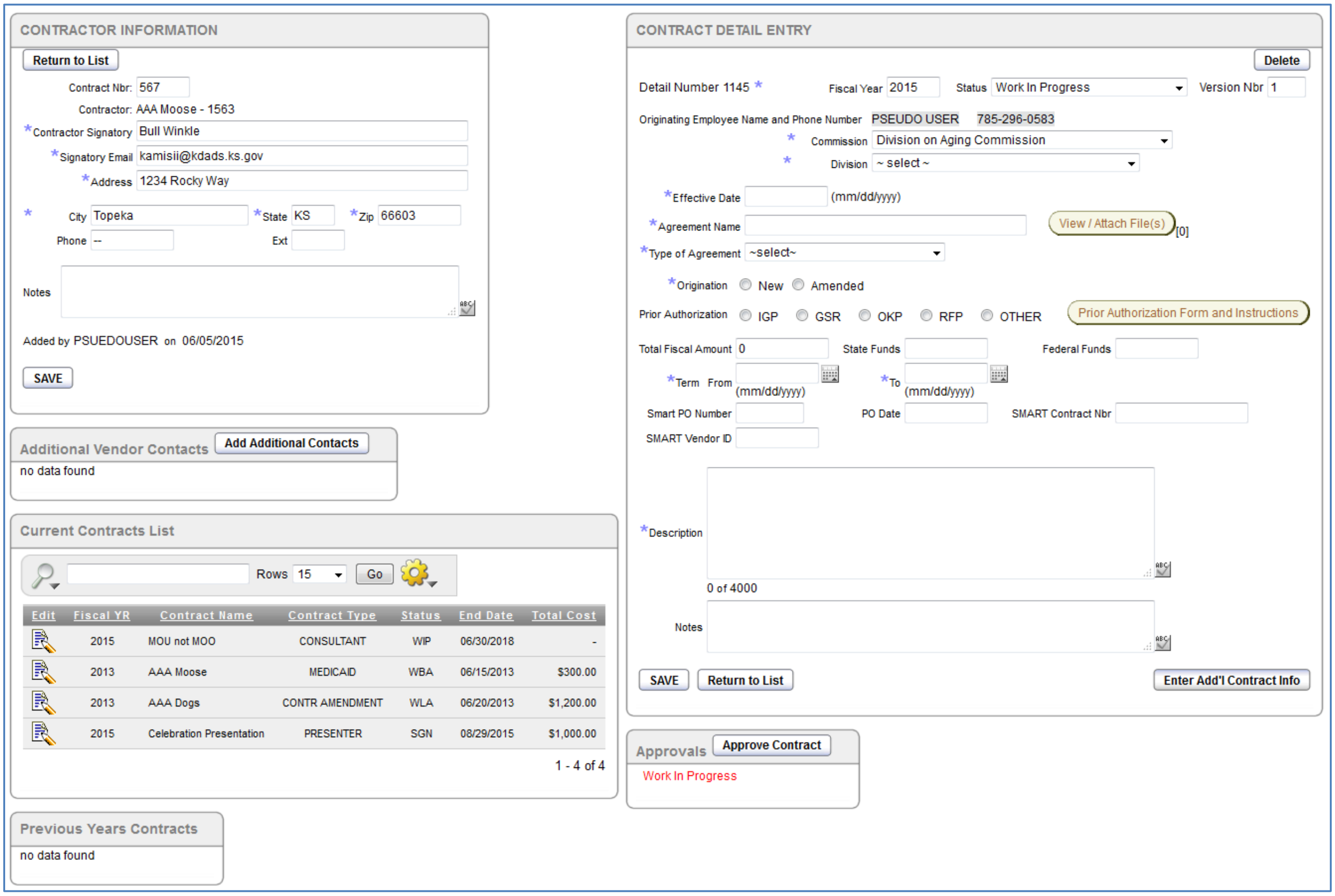
Vendor was….	Result
Selected from drop down list.	Page will forward to the Contract Detail page.
ABSENT – VENDOR MISSING was selected from the drop down list.	Contactor Name field is displayed with a direction note to type in the Contractor's Name. Enter the Contractor Name and click on the SAVE! Button.



Upon a successful save, the application will forward to the Contract Detail page.

Contract Detail Page

Detail page The Contract Detail page consists of several regions. The following pages will review these regions and the functions of each.



Contract Detail Page – Contractor Information Region

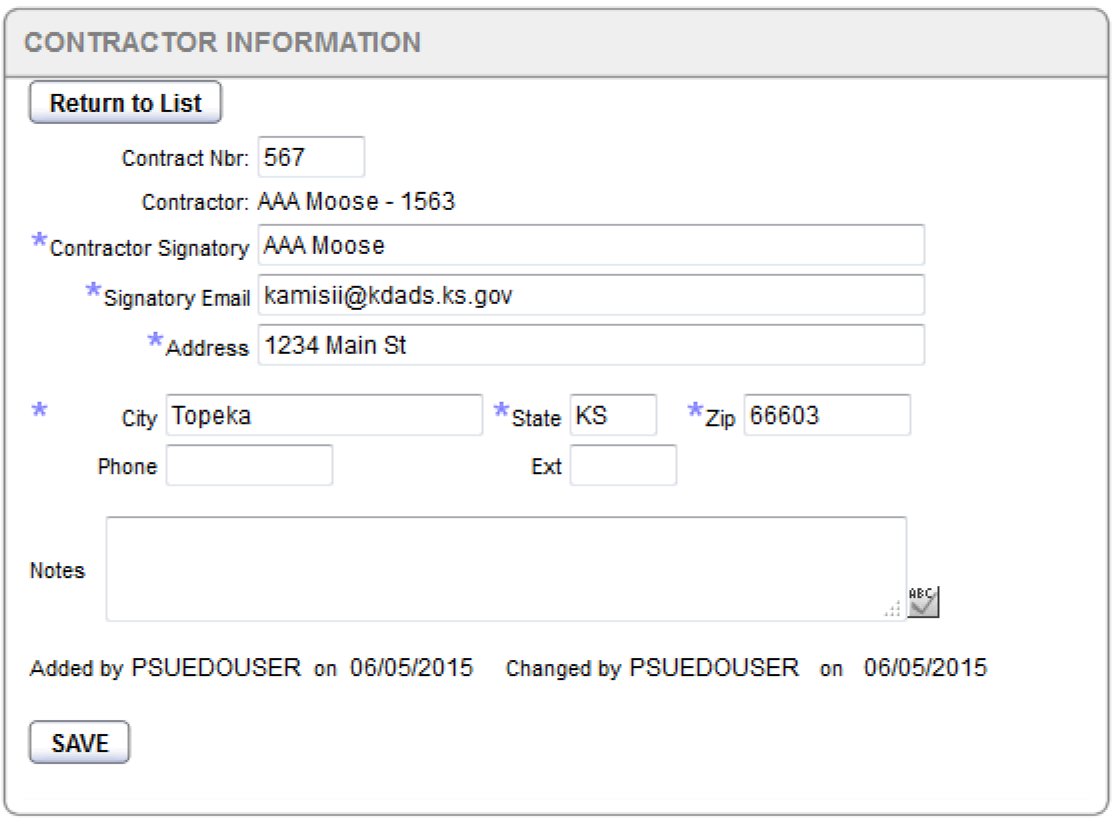
Introduction

If the Contractor was located in the drop down select listing, the Contractor Information region will display with all the currently available contact information for that Contractor. If any information needs to be updated, the information can be changed.

How to

Follow the steps in the table below to change or add contact information for a Contractor.

Step	Action	Result
1.	Existing Vendor - Enter any information that needs to be updated in the appropriate fields. New Vendor – Enter all information for the Contractor.	The following fields are required: • Contractor Signatory • Signatory E-mail • Address (Street, City, State and Zip)



Step	Action	Result
2.	Click on the **Save** button.	

Contract Detail Page – Additional Vendor Contacts Region

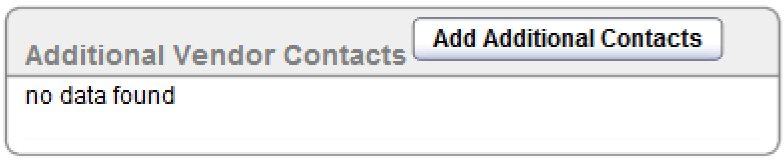
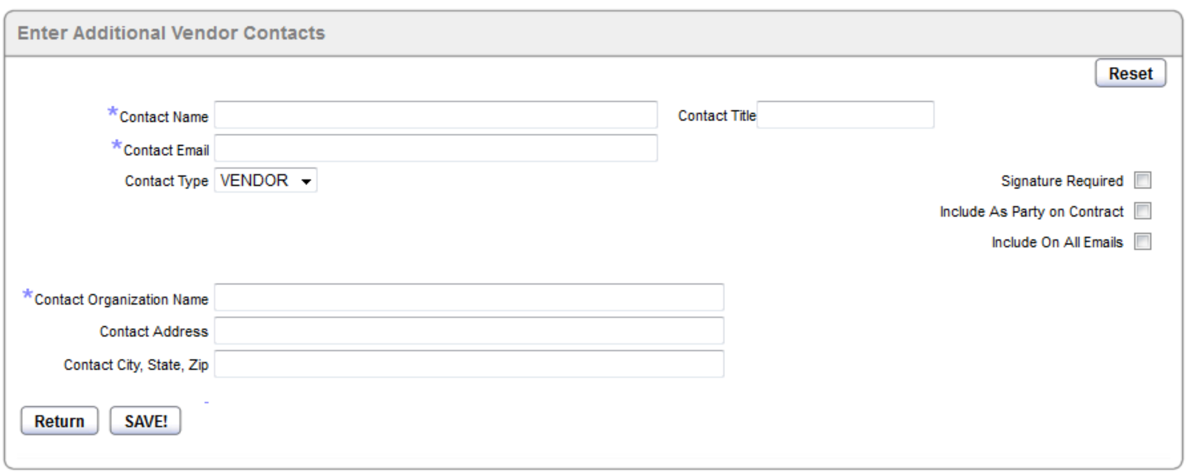
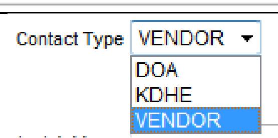
Introduction

If the Contractor has more than one individual who will need to approve and sign the contract, those individuals are entered in this region. These contacts can be added to the contract as additional signatures needed.

At times individuals within other State Agencies will need to approve and sign the contract. These individuals will be added in this region.

How to

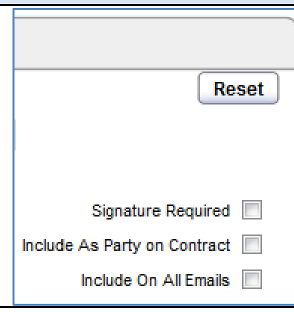
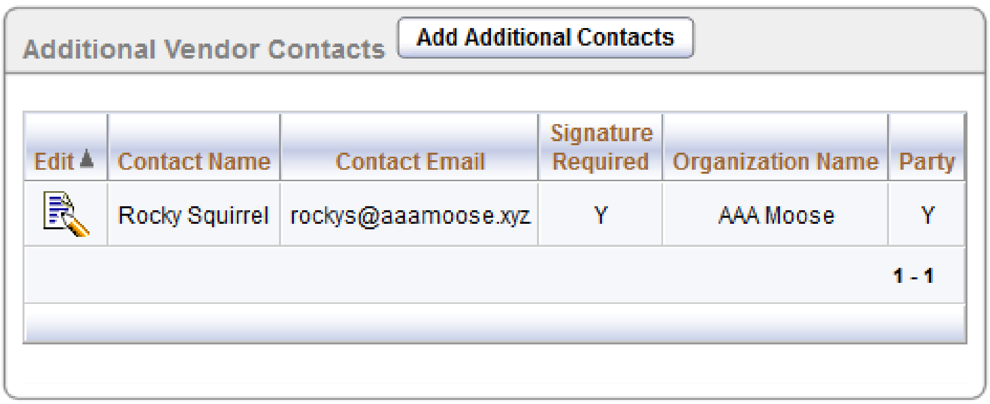
Follow the steps in the table below to add additional contact information for a Contractor.

Step	Action	Result
1.	Click on the **Add Additional Contacts** button.	Enter Vendor Contacts page displays.
		
2.	Enter the additional contact information.	Required fields: • Contact Name • Contact Email • Contact Organization Name
		
3.	Select the Contact Type that the individual represents: • Vendor • Department of Administration • Department of Health and Environment	

Continued on Next Page

Contract Detail Page – Additional Vendor Contacts Region, continued

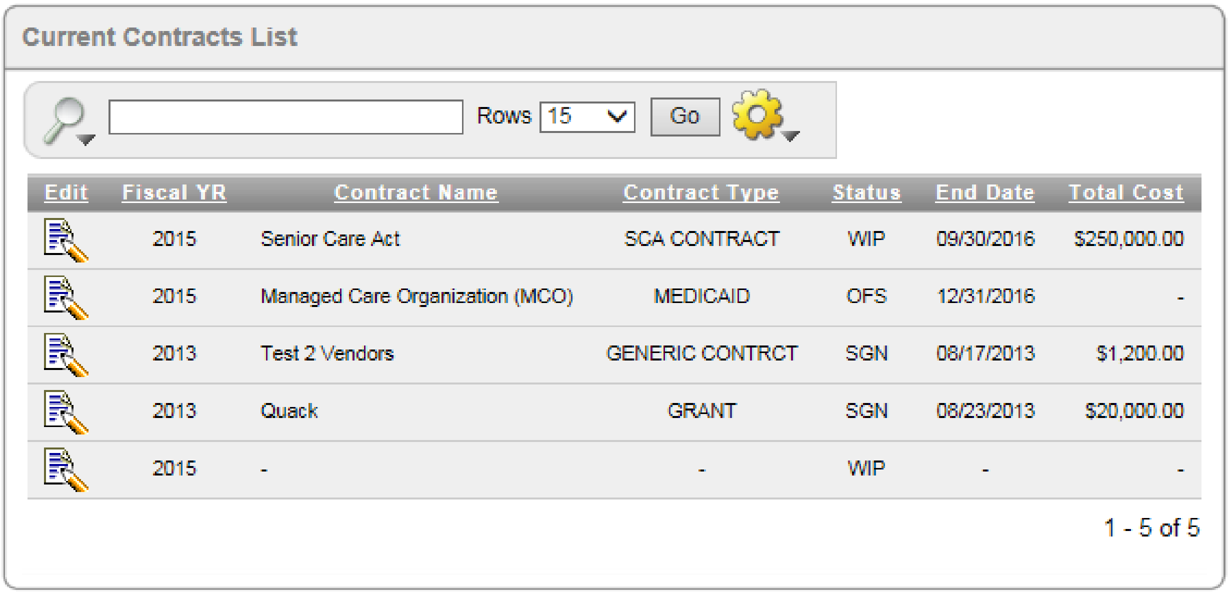
How to *Continued*

Step	Action	Result
4.	If the individual is required to approve and sign the contract, click on the **Signature Required** and the **Include As Party on Contract** boxes (both must be checked.) Check **Include On All Emails** if the additional contact should receive all emails that the Contractor Signatory receives.	
5.	Click on the **SAVE!** button.	Entry will be added and the fields will clear for the next entry.
6.	Click on the **Return** button when all contacts have been entered.	The page is returned to the Contract Detail page with the listing of the contacts displayed.
		

Contract Detail Page – Current Contracts List Region

Current Contracts List

This region displays the current contracts and any previous contracts with the selected contractor. If the contractor is ABSENT – VENDOR MISSING, any contract with the absent vendor designation will be listed here. Once Procurement adds the vendor to the listing and the contract is updated, that contract will display with the appropriate contractor.

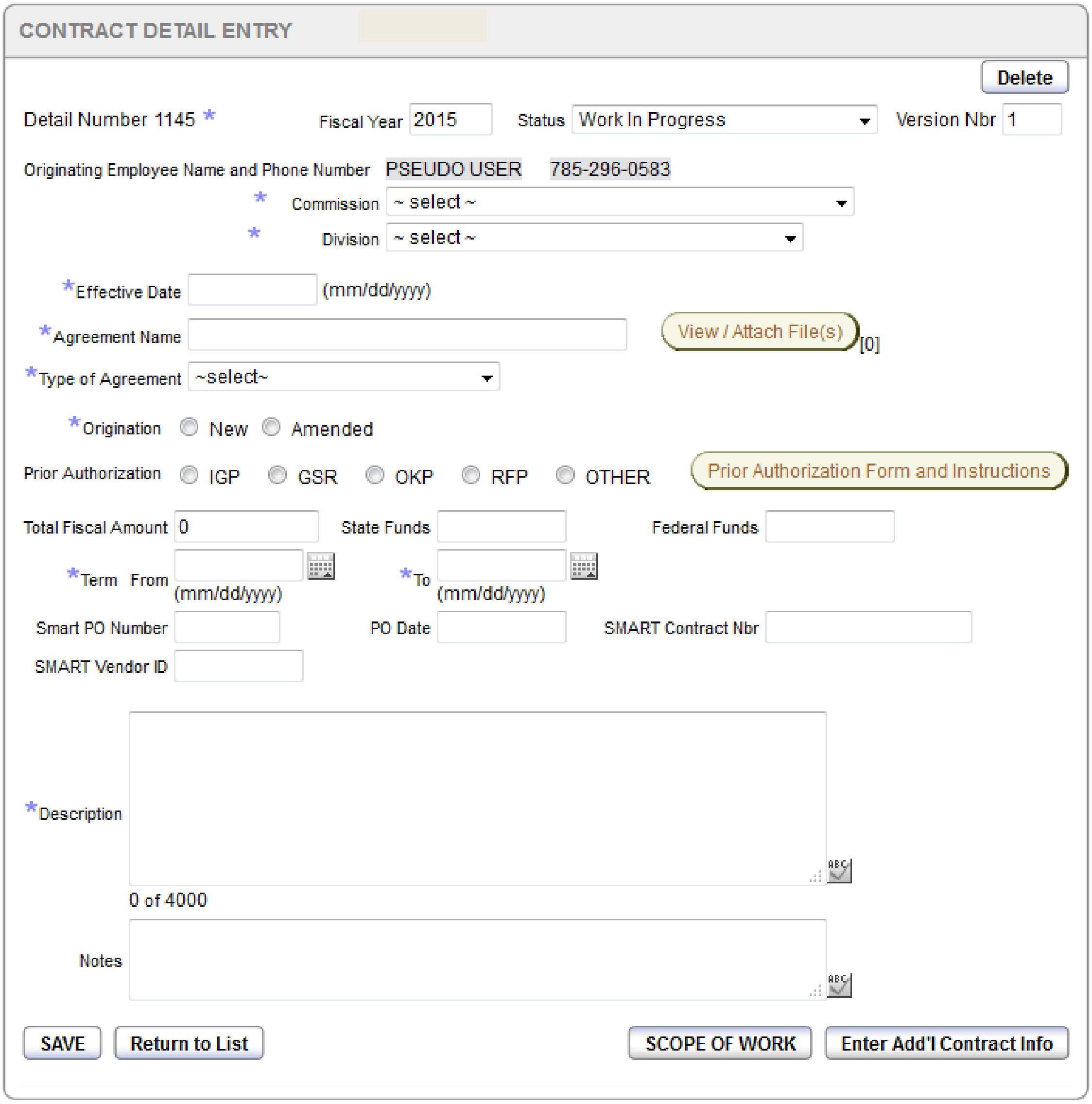


Edit	Fiscal YR	Contract Name	Contract Type	Status	End Date	Total Cost
	2015	Senior Care Act	SCA CONTRACT	WIP	09/30/2016	$250,000.00
	2015	Managed Care Organization (MCO)	MEDICAID	OFS	12/31/2016	-
	2013	Test 2 Vendors	GENERIC CONTRCT	SGN	08/17/2013	$1,200.00
	2013	Quack	GRANT	SGN	08/23/2013	$20,000.00
	2015	-	-	WIP	-	-

Contract Detail Page – Contract Detail Entry Region

Introduction

This region starts the contract-specific information entry for the contract. The information entered in this region is the uniform information needed for all agreement types.



How to

Refer to the table below for a description of each field, and complete the fields as appropriate.

Field	Type of Entry / Description
Detail Number	An automated unique system ID number. This number is auto-generated and cannot be changed.
Fiscal Year	Defaults to the current Fiscal Year; this can be changed

Continued on Next Page

Contract Detail Entry Page – Contract Detail Entry Region, continued

How to *Continued*

Field	Type of Entry / Description
Status	All contracts start with a status of **Work in Progress**. When the contract is ready for the approval workflow, change the status to **Ready for Approval**. The following statuses are changed automatically as the approval and signature workflow processes: • Awaiting Commission Approval • Awaiting Budget Approval • Awaiting DOA Authorization* • Awaiting Procurement Approval • Awaiting Legal Approval • Awaiting Vendor Signature • Awaiting Secretary Signature • Awaiting KDHE Approval (Medicaid Contracts Only) • Signed • Discard • Disapproved *Exception: This status is set manually by Procurement if Procurement Approval is awaiting authorization from the Department of Administration before Procurement can approve. The following status is set manually by the contract originator when signatures must be obtained manually: • Off System
Version Nbr	The Version number of this contract. If a contract is disapproved and resubmitted, a new version of the contract is created, and the version number increases by one.
Originating Employee Name and Phone Number	The system automatically enters the name and phone number of the user who initiated (created) the contract.
Commission	Required – Select the appropriate Commission that is responsible for the contract.
Division	Required – Select the appropriate Division that is responsible for the contract.
Effective Date	Required – This is usually the date the contract is created.
Contract Name	Required – Enter a descriptive name for the contract. Do not include the agreement type in the name as the Type of Agreement is added to the Contract Name to create the title of the contract in the template.
View / Attach Files button	Instructions for How to upload and attach files are covered later in this manual. These files are for KDADS use – they do **NOT** become part of the contract.

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Contract Detail Page – Contract Detail Entry Region, continued

How to *Continued*

Field	Type of Entry / Description
Type of Agreement	Required – the Contract templates available are: • Consultation Services • Generic Amendment • Generic Contract • Grant • Intern Contract • Medicaid Contract • Memorandum of Understanding • Presenter Contract • SCA Contract
Origination	Required – Contract origination – Is this a new or amended contract?
Prior Authorization	Required only if the contract amount is equal to or greater than $5,000.00 Click on the label for a Help tip of the Prior Authorization types. • IGP: Inter/Intra Governmental Purchase • GSR: Grants Subrecipients • OKP: Only known provider, formerly known as "sole source" • RFP: Request for Proposal, "bid" • OTHER: Other type of approval
Prior Authorization Form and Instructions Button	Links to the Intranet website for the required form and the KDADS instructions for Prior Authorizations
Total Fiscal Amount	Required - The total amount of the contract. Will be the sum of the State and Federal fund fields.
State Funds	Required – The portion of the contract cost which be paid from State funds.
Federal Funds	Required – The portion of the contract cost which be paid from Federal funds.
Term – From and To	Required – The start and end dates of the contract.
SMART PO Number	Purchase order number assigned by SMART. *This will be completed by the Procurement Division.*
SMART PO Date	Purchase order date assigned by SMART. *This will be completed by the Procurement Division.*
SMART Contract Nbr	Contract number assigned by SMART. *This will be completed by the Procurement Division.*
SMART Vendor ID	The SMART vendor ID for the selected contractor. *The field will be auto-populated by the system or it will be completed by the Procurement Division.*
Description	Required – Enter a short concise description of the contract for the KDADS approvers to read.
Notes	Enter any special notes regarding the contract.

Continued on Next Page

Contract Detail Page – Contract Detail Entry Region, continued

How to *Continued*

Button	Function / Description
Save	Saves the additions/changes made to the contract.
Cancel	Cancels the initial contract entry without saving and returns to the Contract List page. The Cancel button only appears in the initial screen. Once a contract page is saved, the Cancel button is replaced by the 'Return to List' button.
Scope of Work	Click the button to open the Scope of Work page, containing eight sections that explain the work to be performed with this contract. In most cases, the Scope of Work is required. Scope of Work is covered later in this manual.
Enter Add’l Contract Info	Click the button to open the Additional Contract Information page, which has specialized fields dependent on the agreement type selected. Enter Add'l Contract Info is covered later in this manual.

Contract Detail Page – Approvals Region

Introduction

The Approvals region displays information on the Approval workflow. Any online/electronic signatures that have been obtained will display here once the contract has been signed by at least one approver.

The region will also display whether the approver approved or disapproved the contract.

If the status of the contract is reset to Work in Progress for minor changes, any signatures that had been obtained up to that point will still display. This will help the contract originator set the status back to the proper approval level after making the minor changes.

The Approval process is covered in more detail later in this manual.

View / Attach File(s)

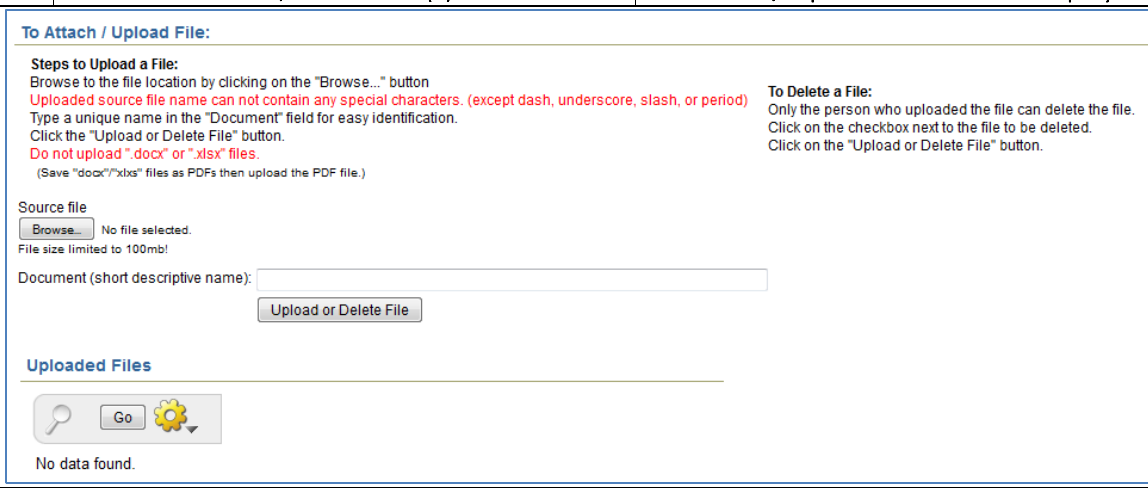
Introduction

The View / Attach File(s) button is used to upload files associated with the contract. Any file uploaded with this utility is for KDADS use only and does NOT become part of the contract.

How to Attach a File

Follow the steps below to attach a file to a contract.

Step	Action	Results
1.	Click on the View / Attach File(s) button.	To Attach / Upload File window displays.



Step	Action	Results
2.	Click on the **Browse** button	The "File Upload" dialog box displays.
3.	Browse to the saved document to be attached. Note: the file will not upload if the file name contains invalid characters. Refer to the instructions above in red for details. If necessary, rename the file before uploading.	For best results only the following type of documents should be uploaded:

Document Type	Additional Info
Word or Excel	.doc and .xls only (docx and xlsx versions are not compatible.)
PDF	Word and Excel files can be converted to PDF using Save as Type > PDF
Graphics	Attach JPG or GIF type graphics – do not attach TIF files

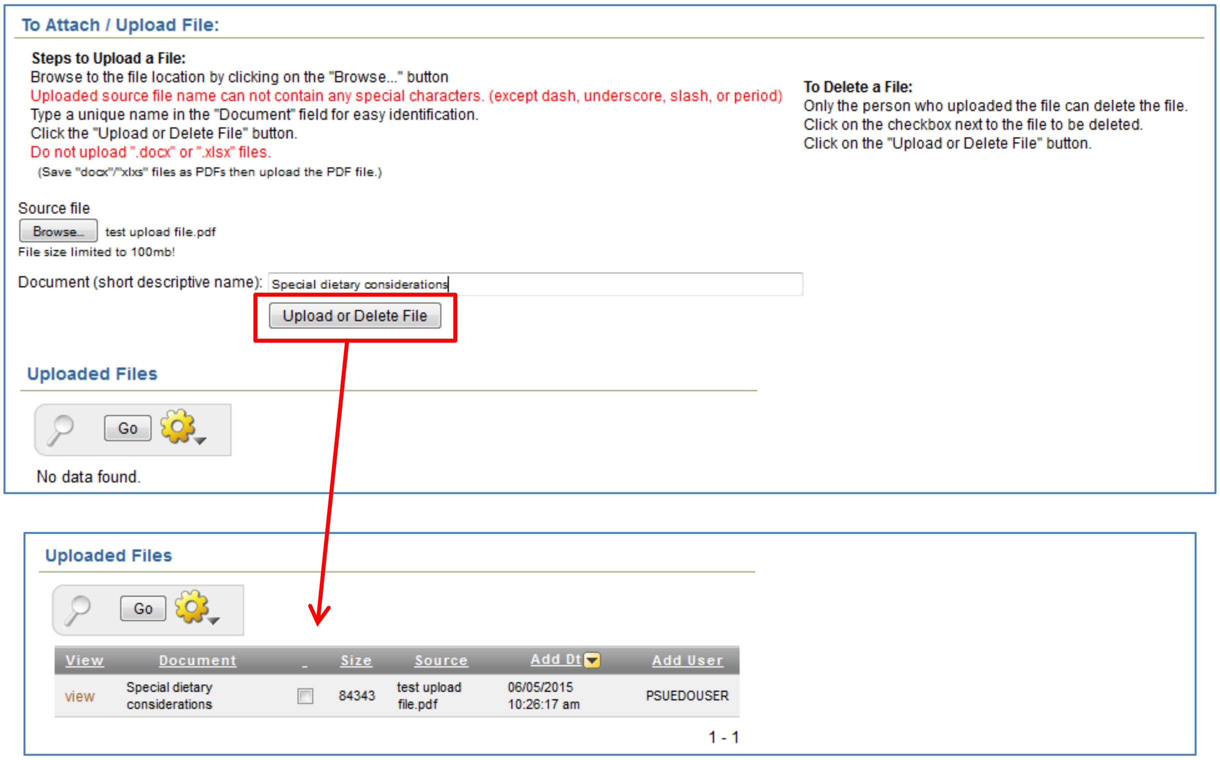
Step	Action	Results
4.	In the File Upload dialog box, click on **Open** button	File is selected and entered into the 'Source file' field.
5.	Enter a short descriptive name in the **Document (short descriptive name)** field.	

Continued on Next Page

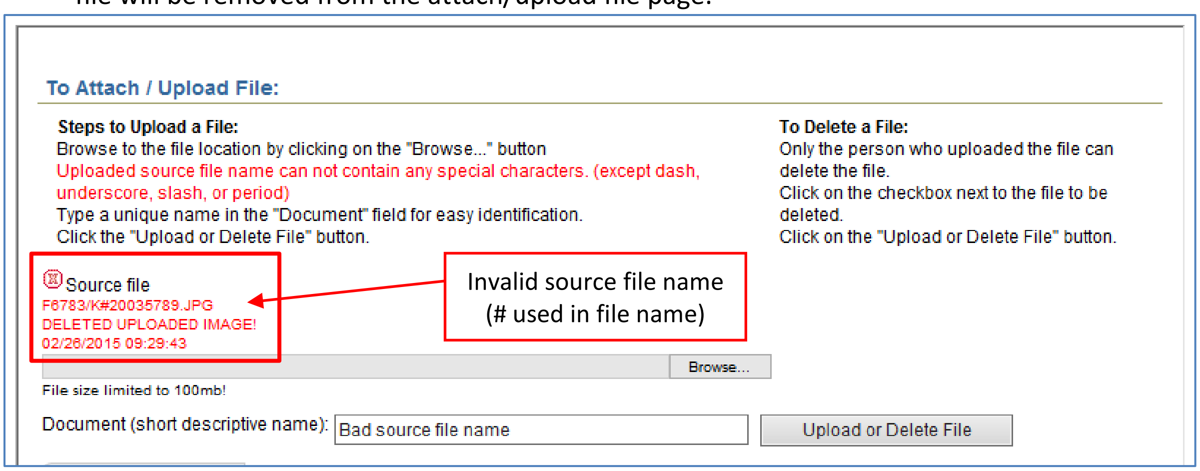
View / Attach File(s), continued

How to Attach a File *Continued*

Step	Action	Results
6.	Click on **Upload or Delete File** button	Completes the upload. Table of the attached files is displayed.



Note: If the source file name contains invalid characters, an error message will display and the file will be removed from the attach/upload file page.



Continued on next page

View / Attach File(s), continued

How to View the File

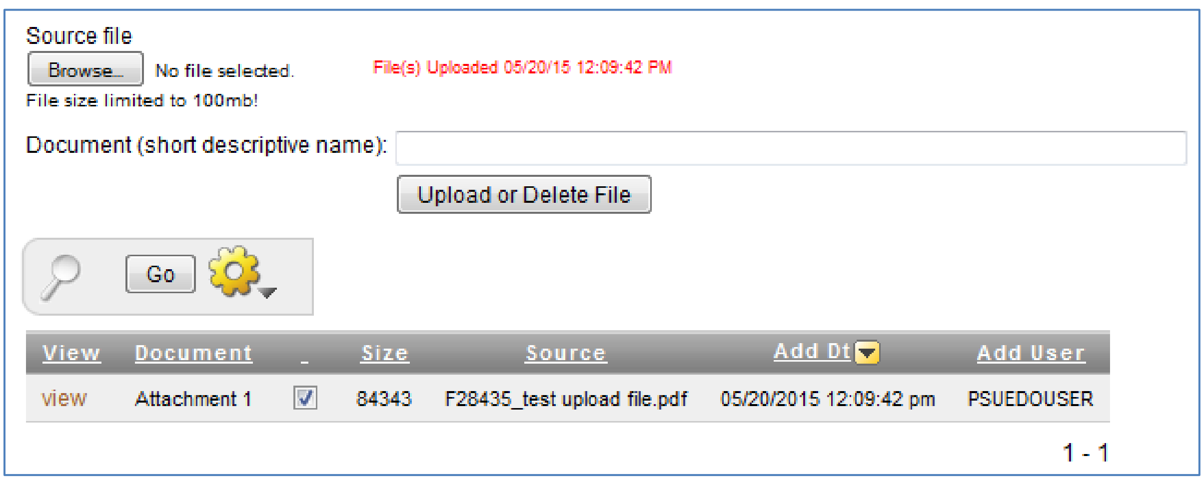
Follow the steps below to view an attached file on a contract.

Step	Action	Results
1.	From the Attach/Upload File page, click on the **view** link in the attached files table.	The document will open in a separate window.

How to Delete the File

Follow the steps below to delete an attached file on a contract.
Note: The delete option is only available to the user who originally attached the file.

Step	Action	Results
1.	Click on the **View/Attach File(s)** button in the Contract Detail Entry region.	The Attach/Upload File utility opens in a new window or tab.
2.	In the attached files table, click on the **checkbox** next to the file to be deleted.	A checkmark appears in the box.



3.	Click the **Upload or Delete File** button.	The attached file is removed from the contract, and the entry no longer appears in the Attach/Upload File utility. Note: The original source file is not deleted; it remains in its original location.

Additional Contract Information Page

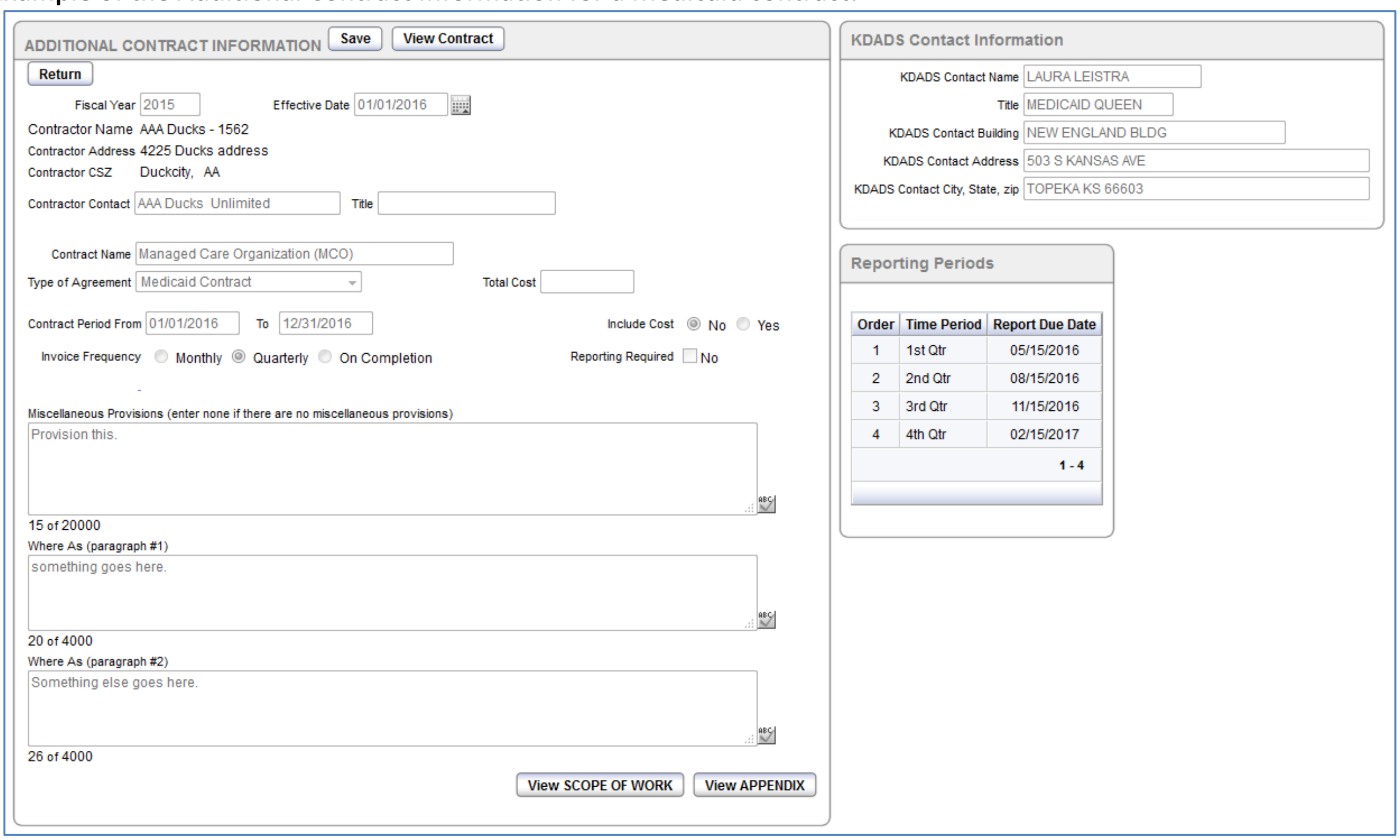
Introduction

The regions that display on this page are specialized, and dependent on, the Type of Agreement selected on the Contract Detail page. The fields that are already populated are filled with the information from the initial Contract Detail page. If any of this information is found to be incorrect, it can be updated on this page and when saved, the Contract Detail page will also be updated.

If the Type of Agreement is changed on this page, saving the region will update it and display the fields for the new contract type.

Any required contract-specific fields that are not completed will produce an error when the page is saved.

Example of the Additional Contract Information for a Medicaid contract:



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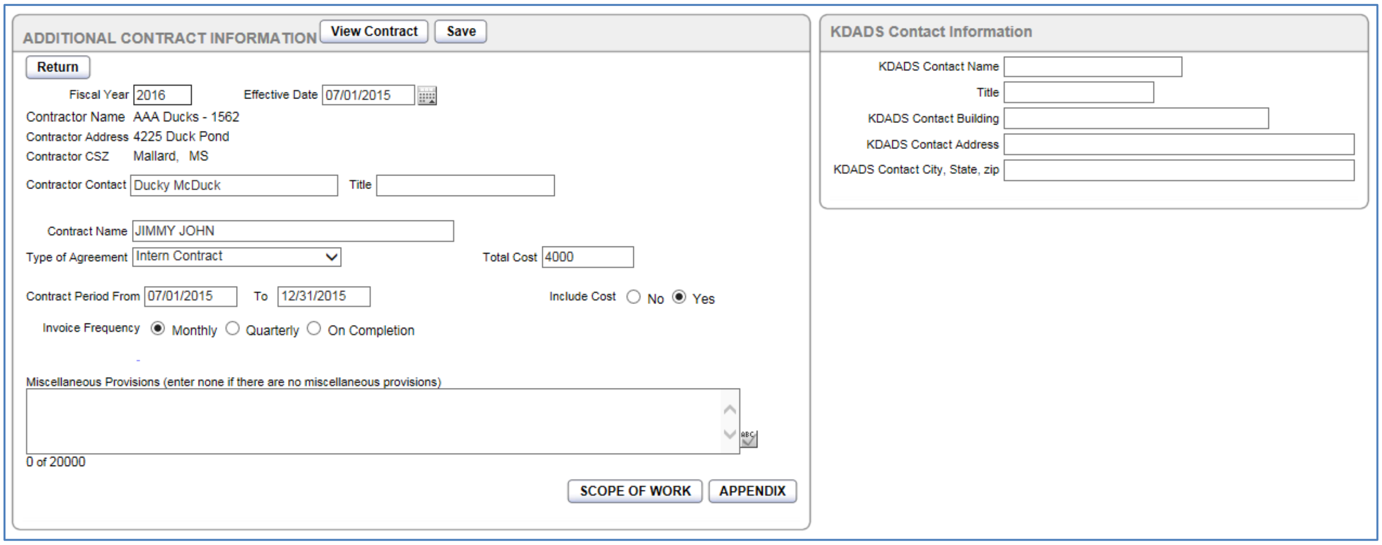
Additional Contract Information Page, continued

Introduction *Continued*

Example of the Additional Contract Information for an Intern contract:



Required Information

Refer to the table on the next page for a grid of all the fields that will display for each contract for which they are associated. Use this table to assist in collecting the required information prior to data entry.

Continued on Next Page

Required Information Specific to Type of Agreement

06/08/2015

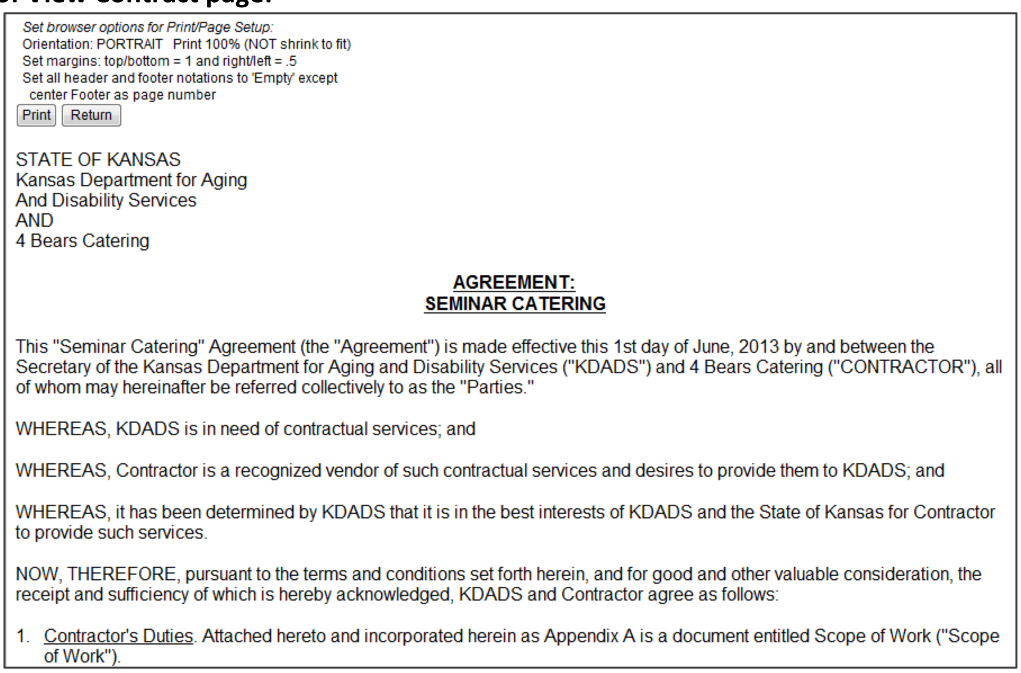
Fields	Generic Amendment	Medicaid	Grant	Presenter Contract	Consultation Services	Generic Contract	Intern Contract	Memo of Understanding	SCA Contract
Effective Date	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Contract/Agreement Name	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Contractor Name	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Contractor Contact	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Contractor Title					XXX				
Contractor Address	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Contractor City	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Contractor State	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Contractor Zipcode	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Original Grant Name	XXX								
Original Grant Effective Date	XXX								
Event Name				XXX					
Event Date				XXX					
Event Location				XXX					
Event City				XXX					
Event State				XXX					
Total Cost		XXX			XXX	XXX			
KDADS Contact Name	XXX	Secretary	XXX	XXX		Secretary	XXX	Secretary	XXX
KDADS Contact Title	XXX	Contractor copy to:	XXX	XXX			XXX	XXX	XXX
KDADS Contact Building	XXX	CC to	XXX	XXX			XXX	XXX	XXX
KDADS Contact Address	XXX	CC to	XXX	XXX			XXX		XXX
KDADS Contact City, State, zip	XXX	CC to	XXX	XXX			XXX		XXX
Contract Term or Period Start Date		XXX			XXX	XXX		XXX	XXX
End Date		XXX			XXX	XXX			XXX
Fiscal Year					XXX	XXX		XXX	XXX
Scope of Work		XXX	XXX	XXX		XXX		XXX	XXX
Amendment Nbr	XXX								
Reporting		XXX				XXX		XXX	XXX
Additional Comments									
Miscellaneous Provisions	XXX	XXX		XXX	XXX	XXX	XXX	XXX	XXX
Contractual Provisions		XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Report Due Date		XXX							
Number of Days (quantity)		State cost		XXX					
Contractor Budget Summary		XXX							
KDADS Grant Award Number			XXX						
Federal Award Number			XXX						
Monitoring Determination			XXX						

Additional Contract Information Page, continued

How to Follow the steps in the table below to complete the Additional Contract Information page.

Step	Action	Result
1.	Complete the required information as listed on the previous page for each contract type.	If a required field is not completed, a validation error will remind you to when you save the page.
2.	Button Actions: • **Save** - Information is saved • **Return** – Returns to the previous page • **View Contract** – opens a print preview of the contract. All required fields must be entered before the contract can be viewed. • **Scope of Work** – Opens the Scope of Work entry page (covered in the next section.) This is required for most contracts. • **Appendix** – Opens the Appendix entry page, if needed for the contract. An Appendix entry is not required.	

Example of View Contract page:


Set browser options for Print/Page Setup:
Orientation: PORTRAIT Print 100% (NOT shrink to fit)
Set margins: top/bottom = 1 and right/left = .5
Set all header and footer notations to 'Empty' except
center Footer as page number
Print Return

STATE OF KANSAS
Kansas Department for Aging
And Disability Services
AND
4 Bears Catering

AGREEMENT:
SEMINAR CATERING

This "Seminar Catering" Agreement (the "Agreement") is made effective this 1st day of June, 2013 by and between the Secretary of the Kansas Department for Aging and Disability Services ("KDADS") and 4 Bears Catering ("CONTRACTOR"), all of whom may hereinafter be referred collectively to as the "Parties."

WHEREAS, KDADS is in need of contractual services; and

WHEREAS, Contractor is a recognized vendor of such contractual services and desires to provide them to KDADS; and

WHEREAS, it has been determined by KDADS that it is in the best interests of KDADS and the State of Kansas for Contractor to provide such services.

NOW, THEREFORE, pursuant to the terms and conditions set forth herein, and for good and other valuable consideration, the receipt and sufficiency of which is hereby acknowledged, KDADS and Contractor agree as follows:

1. Contractor's Duties. Attached hereto and incorporated herein as Appendix A is a document entitled Scope of Work ("Scope of Work").

Please note the Printing instructions at the top of the page. Adhere to these settings so the contract prints correctly.

Scope of Work

Introduction

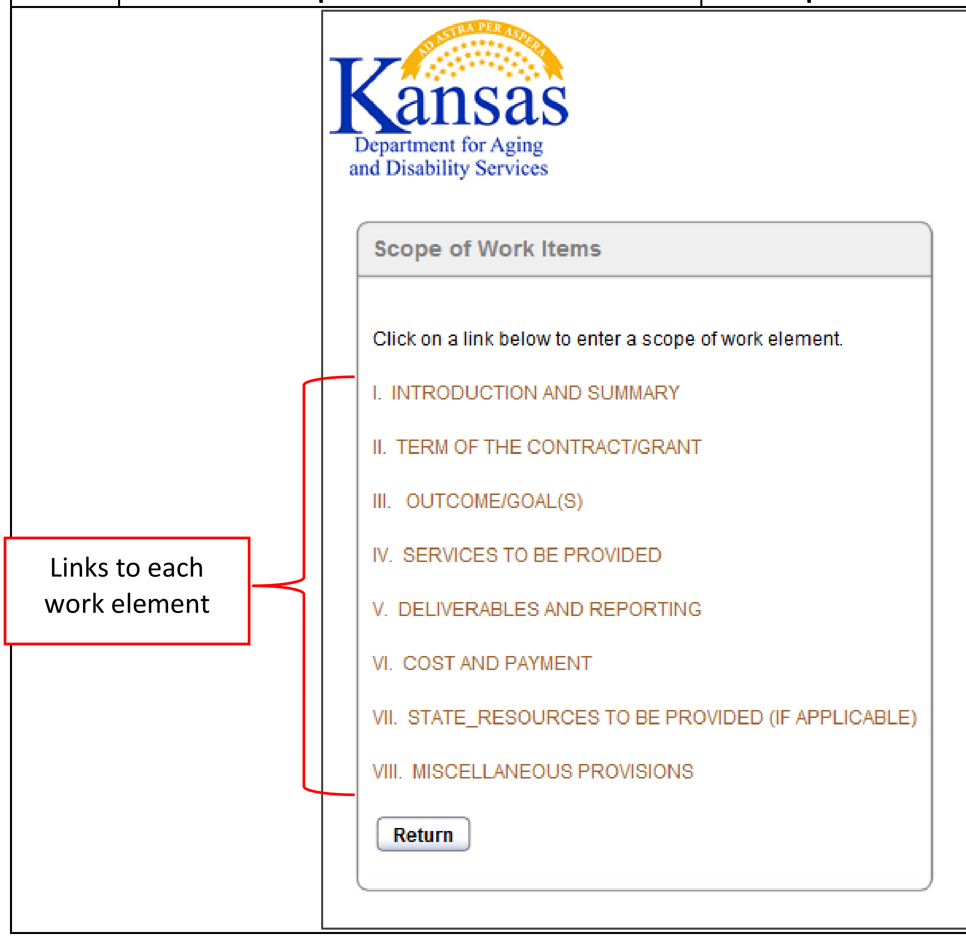
The Scope of Work page must be completed in its entirety for most contracts. Once the initial contract has been created, the Scope of Work can be entered at any time. A button is provided on both the main Contract Detail page, and the Additional Contract Information page. If a specific section of the Scope of Work is not applicable to a particular contract, a sentence stating as much should be entered for that section.

IMPORTANT! If Scope of Work text is going to be pasted from previously entered text in another application (Microsoft Word, Wordpad, etc.) the contract ***must be accessed using Internet Explorer***. Pasting text into the Scope of Work page using any other browser will cause an error and the contract cannot be viewed. See the Important Information section later in this chapter for details on how to correct the error if it does occur.

How to

Follow the steps in the table below to enter the Scope of Work information for a Contract.

Step	Action	Result
1.	Click on the **Scope of Work** button.	The **Scope of Work Items** page displays.



Continued on next page

Scope of Work, continued

How to *continued*

Step	Action	Result
2.	Click on the link to display the entry field for each work element. There will be an explanation with each section as to what should be entered.	The Rich Text Editor window opens* for entry of the appropriate work element text. *The Rich Text editor is not available in Internet Explorer. Use Firefox 33.1.1 or Safari browser to access it.
	Use *only* Internet Explorer if you are going to copy/paste text into the work element.	

Rich Text Editor (Firefox and Safari)

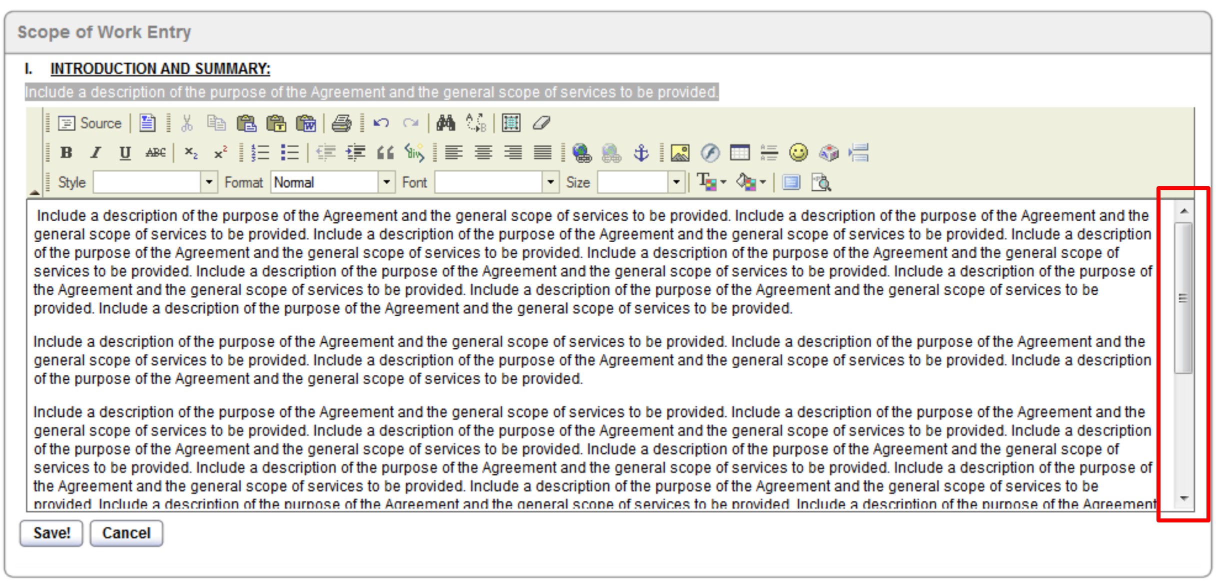
If you use Internet Explorer as your browser, you can skip this section, as this feature is not available in IE.

The **Rich Text Editor toolbar** is similar to what is found in Microsoft Word, though not quite as robust in features. The toolbar can be used to enhance the formatting of the text typed in the Scope of Work.

If typing a large amount of text into a work element, use one of these options to see text beyond the default window size:

- Use the scroll bar to scroll up and down in the same-sized window
- Use the 'Maximize editor size' button to enlarge the work element window to the full browser window size

Scroll Bar:

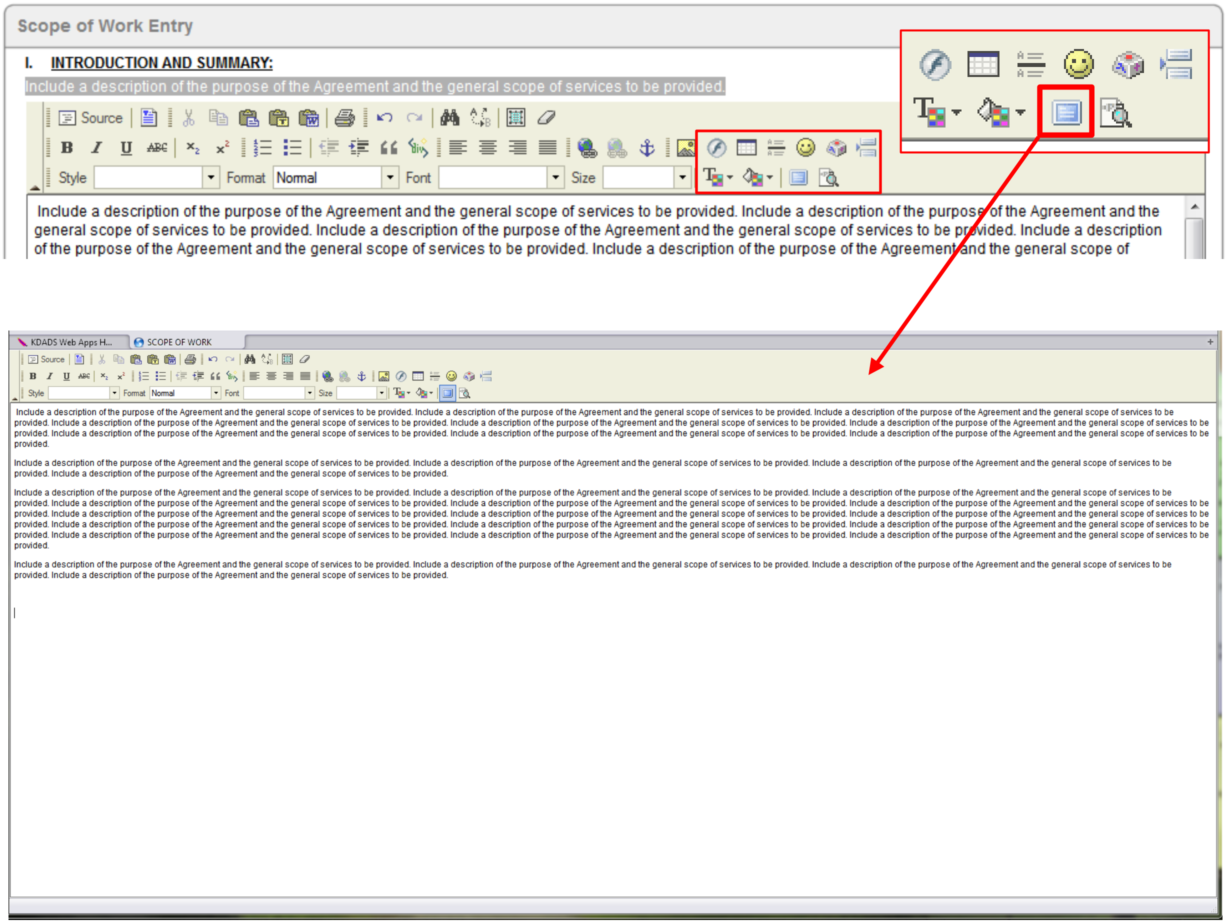


Continued on next page

Scope of Work, continued

Rich Text Editor *continued*

Maximize editor size (enlarges to fill the browser window):



Note: The 'Maximize editor size' button toggles on and off. Click it once to maximize, click it again to restore the window to its original size.

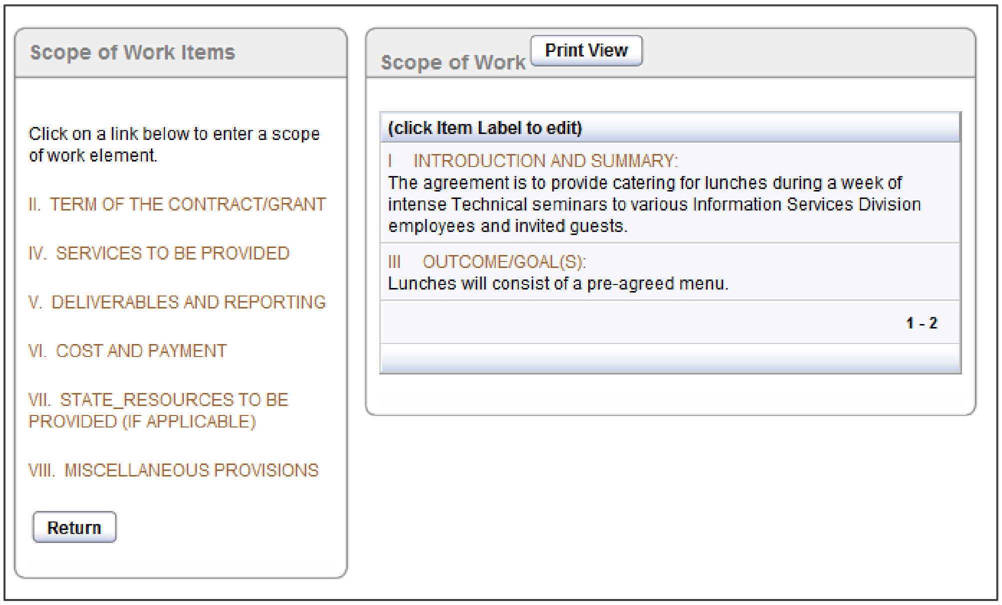
How to (continued)

Step	Action	Result
3.	Enter the appropriate text for the Scope of Work item selected, add rich text formatting as desired, and click on the **Save** button. Note: The Cancel button will clear the entry, close the entry box, and the item will remain in the Scope of Work Items list.	The entry is saved and moves to the new region labeled **Scope of Work [Print View]** All entries will appear here after they have been saved. As each Scope of Work item is entered and saved, it will be removed from the *Scope of Work Items* region and moved to the *Scope of Work [Print View]* region.

Continued on next page

How to *continued*

Scope of Work regions after work elements have been entered:

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>4.</td><td>Continue until all Scope of Work Items have been completed.</td><td>If a particular work element is not needed, enter a statement indicating the work element is not needed for the contract.</td></tr>
<tr><td>5.</td><td>An alternative to typing the text directly into the Scope of Work text area is to type the text in an external editor such as Microsoft Word and then copy and paste it into the Scope of Work text area. If you use this method, you must access the contract using Internet Explorer for Scope of Work entry.</td><td>Important: Refer to the next Section of this chapter for instructions on how to fix a contract if the wrong browser was used when the text was pasted into the Scope of Work.</td></tr>
<tr><td>6.</td><td>Click on the Print View button to see a preview of how the Scope of Work will appear within the contract.</td><td>Only the Scope of Work will appear. To view the whole contract, use the View Contract button on the Contract Detail or Contract Additional Information page.</td></tr>
</table>

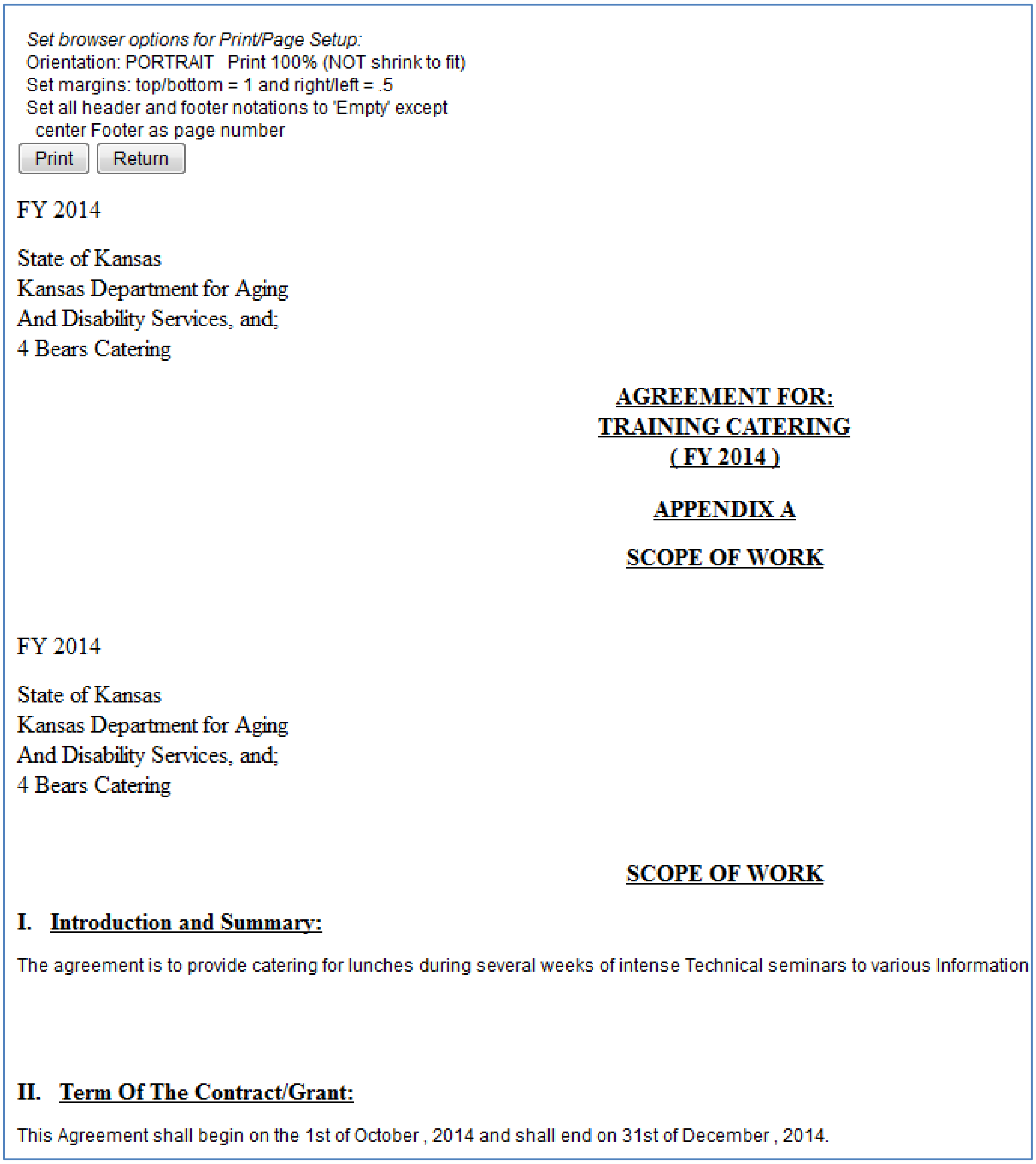
Continued on next page

Scope of Work, continued

How to *Continued*

Step	Action	Result

Print View of Scope of Work:



Step	Action	Result
7.	Click on the **Return** button to return to the Scope of Work page.	The Scope of Work page and work element links display.
8.	To edit a work element, click on the Item Label link in the **Scope of Work [Print View]** region. Edit the entry and click the Save button.	The contract must still be in Work in Progress status to edit a Scope of Work entry.

Continued on next page

How to *Continued*

Step	Action	Result
9.	Click on the **Return** button in the *Scope of Work Items* region to exit the Scope of Work age.	The Contract main page displays.

Special Instructions: Section II, Section VI Work Elements

Section II – Term of the Contract/Grant:
Copy the explanation provided under the section title, and paste the phrase into the text entry box to enter the actual terms description. The term dates come from the main contract page and are displayed for reference.

Section VI – Cost and Payment:
Include the total amount of the Agreement and how it is payable. Include the statement that ' It is KDADS' business practice that prior to making payment, KDADS must receive and approve a monthly or quarterly invoice.'

Important Information:

How to Fix a Contract if Scope of Work Text is Copied/ Pasted using any Browser but Internet Explorer

If you choose to type the Scope of Work information in Microsoft Word or another external application, and then paste it into the Scope of Work page in the contract, you ***must*** use Internet Explorer when pasting the text into the contract's Scope of Work.

If another browser is used, a large amount (approximately 300 lines) of formatting code is inserted into the Contract database, and when the Contract is viewed, an error displays instead:

ORA-06502: PL/SQL: numeric or value error ORA-06502: PL/SQL: numeric or value error

In the past, KDADS Applications Development staff has cleaned out the code from the database, taking an inordinate amount of time to complete this task. As of the publishing of this updated manual, this will no longer be the responsibility of the Applications Development team.

If a user pastes text from an external application into the Scope of Work page using a browser other than Internet Explorer, it will be the user's responsibility to correct the error, following these steps:

Step	Action	Result
1.	If the contract is no longer in WIP status, contact the appropriate Legal Department staff and have the Contract reset to WIP.	The contract is editable.
2.	Open the Contract in ***Internet Explorer***.	The contract's main page displays.
3.	Click on the **View SCOPE OF WORK** button.	The Scope of Work page displays.
4.	Click on the link to the first section that has pasted text in it.	The section opens.
5.	Delete the text that was pasted.	The text area is cleared.

Continued on next page

Scope of Work, continued

Important Information… *Continued*

Step	Action	Result
6.	Re-paste the text into the text area just cleared.	If the original text that was copied is no longer available (i.e. the Word document it was created in is no longer available,) the text can either be entered directly into the Scope of Work text area, or the text can be re-typed in a Word document and then copy/pasted to the Scope of Work text area again.
7.	Save the Scope of Work section.	The newly copied/entered text is saved and the section closes.
8.	Repeat steps 4-7 for any other Scope of Work sections that need to be repaired.	

Appendix

Introduction

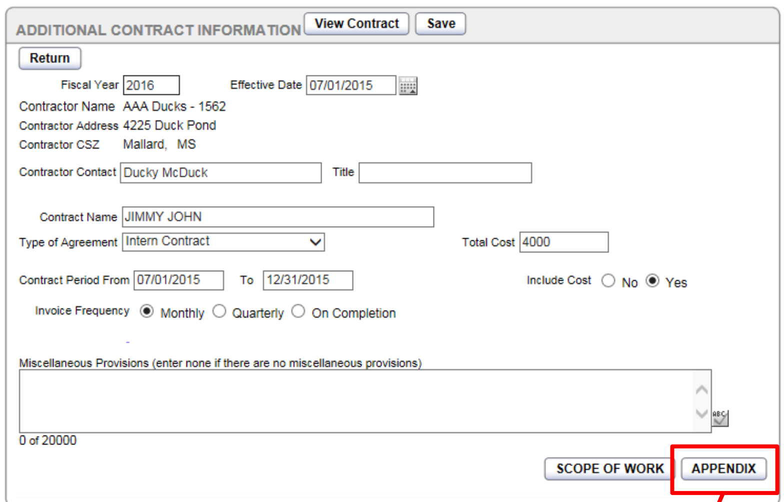
The Appendix page of a contract is used to enter any appendices that are needed for the contract. The Appendix entry page is not required for any contract.

The Appendix is accessed from the Additional Contract Information page.

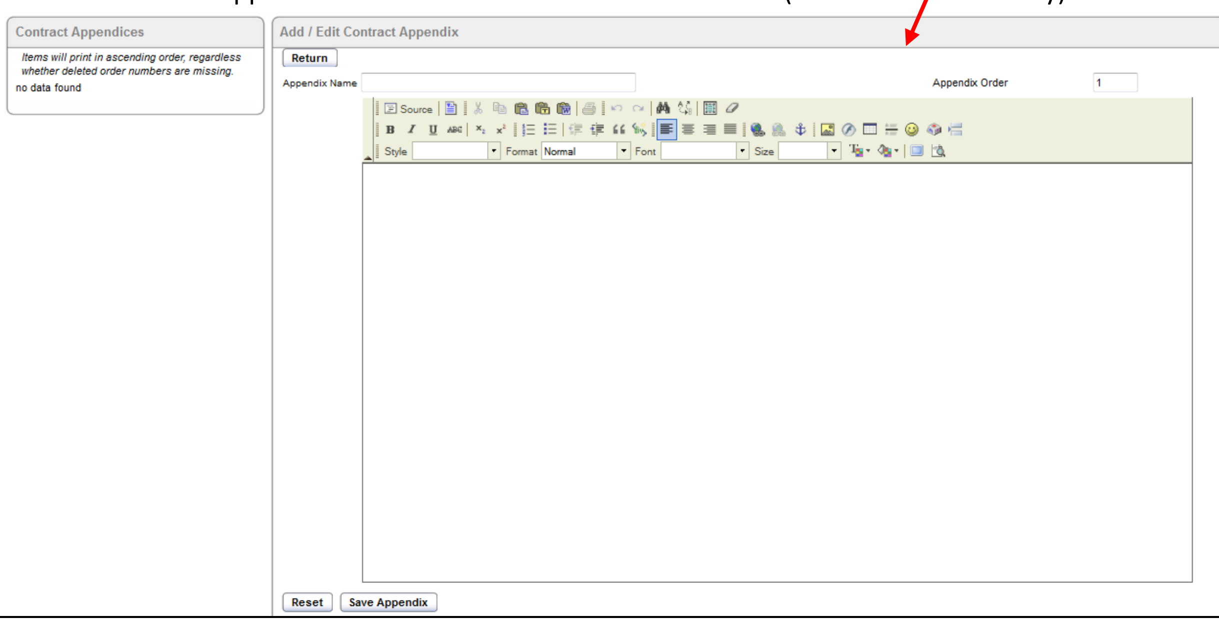
How to

Follow the steps in the table below to enter Appendix information for a Contract.

Step	Action	Result
1.	From the main Contract Detail page, click on the **Enter Add'l Contract Info** button.	Additional Contract Information page displays.
2.	Click on the **APPENDIX** button	The Contract Appendix entry page displays.



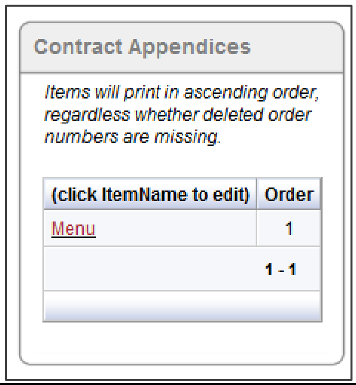
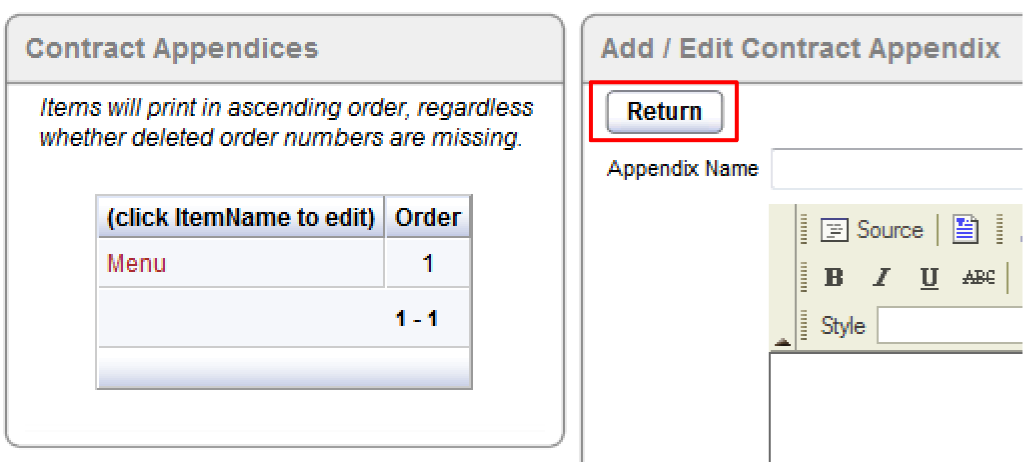
The Appendix also uses the Rich Text Editor toolbar (Firefox and Safari only)



Continued on next page

Appendix, continued

How to *Continued*

Step	Action	Result
3.	Enter the **Appendix Name**.	
4.	Tab to or click your mouse in the text area.	Insertion point moves.
5.	Enter the desired Appendix information, formatting the text as desired with the Rich Text Editor toolbar.	Note: To clear all text entered in order to start over with this entry, click on the **Reset** button and everything entered will clear.
6.	Click on the **Save Appendix** button to save the entry.	The saved Appendix entry will be listed in the Contract Appendices region on the left side of the page.
		
7.	To enter another Appendix, repeat the above steps.	Multiple appendices can be entered on a single contract.
8.	To edit a saved Appendix entry, click on the link in the Contract Appendices region.	The Appendix entry displays with the Rich Text Editor.
9.	To exit out of the Contract Appendix page, click on the **Return** button until the desired contract page displays.	
		

Viewing the Contract

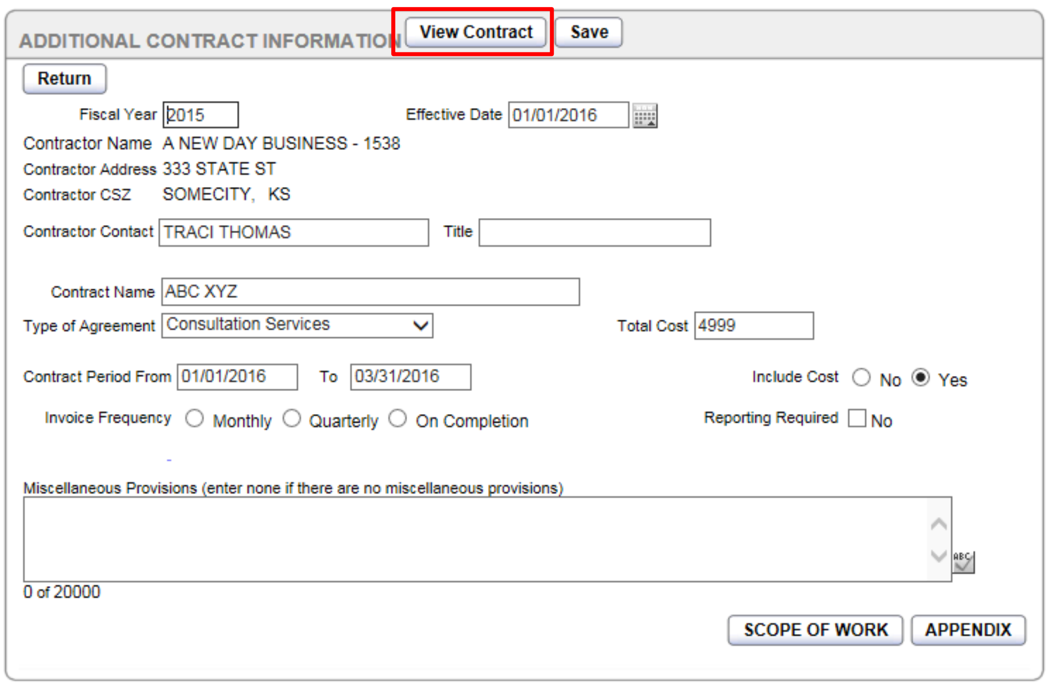
Introduction

Once a contract has been created and the required Contract Detail information entered and saved, the contract template can be viewed at any time. While the template information of the contract will display for all sections of the contract, only contract-specific information that has been entered up to that point will appear on the contract.

How to

Follow the steps in the table below to view a contract template.

Step	Action	Result
1.	Go to the Additional Contract Information page of the contract	The page displays
2.	Click on the View Contract button.	



Step	Action	Result
3.	The contract template displays, with instructions for printing located in the top left corner of the page.	The actual contract print page starts with the text below the *Print* and *Return* buttons.
4.	The following pages display an example of a contract using the Generic Contract template	Location of page breaks depends on how much information is entered in the contract scope of work, appendices, etc.

Continued on next page

Viewing the Contract, continued

Generic Contract template

Set browser options for Print/Page Setup:
Orientation: PORTRAIT Print 100% (NOT shrink to fit)
Set margins: top/bottom = 1 and right/left = .5
Set all header and footer notations to 'Empty' except center Footer as page number
Print Return

Printing instructions

STATE OF KANSAS
Kansas Department for Aging
And Disability Services
AND
4 Bears Catering

AGREEMENT:
SEMINAR CATERING

This "Seminar Catering" Agreement (the "Agreement") is made effective this 1st day of June, 2013 by and between the Secretary of the Kansas Department for Aging and Disability Services ("KDADS") and 4 Bears Catering ("CONTRACTOR"), all of whom may hereinafter be referred collectively to as the "Parties."

WHEREAS, KDADS is in need of contractual services; and

WHEREAS, Contractor is a recognized vendor of such contractual services and desires to provide them to KDADS; and

WHEREAS, it has been determined by KDADS that it is in the best interests of KDADS and the State of Kansas for Contractor to provide such services.

NOW, THEREFORE, pursuant to the terms and conditions set forth herein, and for good and other valuable consideration, the receipt and sufficiency of which is hereby acknowledged, KDADS and Contractor agree as follows:

1. Contractor's Duties. Attached hereto and incorporated herein as Appendix A is a document entitled Scope of Work ("Scope of Work").
2. Compensation. The total amount payable under this Agreement shall not exceed $7000. Contractor shall submit a written, itemized invoice upon contract completion. Assuming approval, KDADS shall pay such invoice within thirty (30) days of its receipt of the same.
3. Term of Agreement. The term of this Agreement shall commence on 06/01/2013 and shall end on 06/30/2013, unless terminated earlier pursuant to the provisions herein.
4. Agreement Termination, Default and Remedies.
   a. Any party may terminate this Agreement, other than as specified herein below, by giving written notice of the termination at least 20 calendar days prior to the date of termination stated in the written notice.
   b. KDADS may terminate this Agreement without prior notice upon making the determination that termination is necessary to avoid harm to the public, to prevent fraud or abuse, or to protect public funds.
   c. In the event that Contractor fails to perform a material provision of this Agreement, KDADS may, in addition to such other remedies provided for by law:
      i. Terminate this Agreement; or
      ii. Delay payment until KDADS verifies Contractor's performance.

FY 2013

State of Kansas
Kansas Department for Aging
And Disability Services, and;
4 Bears Catering

AGREEMENT:
SEMINAR CATERING
(FY 2013)

APPENDIX A

SCOPE OF WORK

FY 2013

State of Kansas
Kansas Department for Aging
And Disability Services, and;
4 Bears Catering

SCOPE OF WORK

I. INTRODUCTION AND SUMMARY:

The agreement is to provide catering for lunches during a week of intense Technical seminars to various Information Services Division employees and invited guests.

II. TERM OF THE CONTRACT/GRANT:

This Agreement shall begin on the 1st of June, 2013 and shall end on 30th of June, 2013.

III. OUTCOME/GOAL(S):

Lunches will consist of a pre-agreed menu.

FY 2013

State of Kansas
Kansas Department for Aging
And Disability Services, and;
4 Bears Catering

AGREEMENT FOR PRESENTATION SERVICES
(FY 2013)
APPENDIX B

Menu

Day	Items
One	• Poppy Salad • Assorted Croissant Sandwiches • Assorted Cream Tarts
Two	• Poppy Salad • Assorted Croissant Sandwiches • Assorted Cream Tarts
Three	• Poppy Salad • Assorted Croissant Sandwiches • Assorted Cream Tarts
Four	• Poppy Salad • Assorted Croissant Sandwiches • Assorted Cream Tarts

FY 2013

State of Kansas
Kansas Department for Aging
And Disability Services, and;
4 Bears Catering

AGREEMENT FOR PRESENTATION SERVICES
(FY 2013)

APPENDIX C

Kansas Department of Administration Form DA-146a (Rev. 6/12)

State of Kansas
Department of Administration
DA-146a (Rev. 06-12)

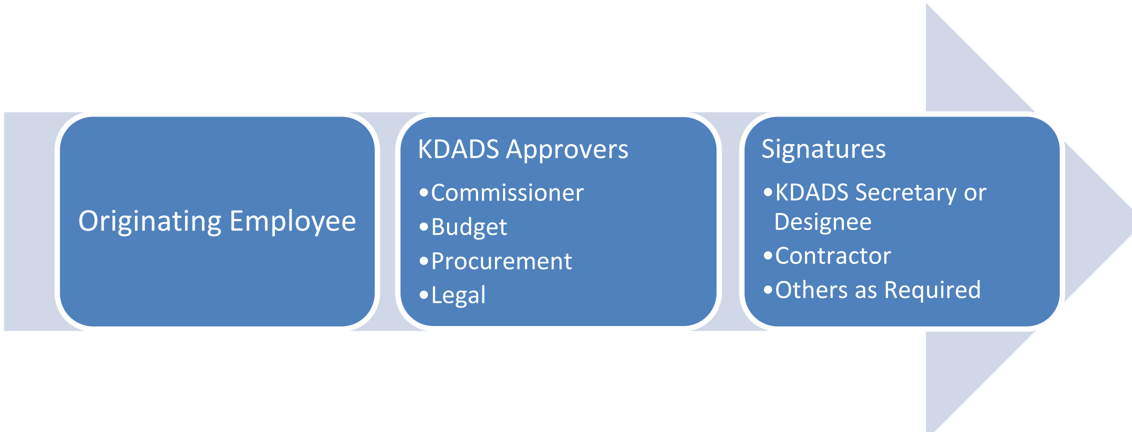
CONTRACTUAL PROVISIONS ATTACHMENT

Important: This form contains mandatory contract provisions and must be attached to or incorporated in all copies of any contractual agreement. If it is attached to the vendor/contractor's standard contract form, then that form must be altered to contain the following provision:

Submitting the Contract to the Approval Workflow

Introduction

Once all information has been entered in a contract, the status can be changed to “Ready for Approval.” This will start the contract approval workflow routing. Each approval level has a primary contact (required) and then two or three alternates (not required.) E-mail notification that there is a contract to approve is sent to all persons listed for that specific approval level. Once that level has approved the contract, then the next level will be notified. The routing and the actions are as follows:



The Legal Division is responsible for maintaining the list of the KDADS approvers.

How to

Follow the steps in the table below to start the contract approval process.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1.</td><td>In the Contract Detail Entry region, in the status field, select Ready for Approval</td><td></td></tr>
<tr><td>2.</td><td>Click on the SAVE button</td><td>Several things happen:</td></tr>
<tr><td colspan="3">• The Status automatically switches to Awaiting Commission Approval and the fields become read only
• A new region labeled Approvals displays below the Contract Detail Entry region
• An email is sent to the first Approval workflow level – the originating employee’s Commissioner</td></tr>
<tr><td colspan="3">** The Approval Workflow process is covered in detail in the chapter 'Limited Access – Approving the Contract' **

** At any approval level, the contract can be disapproved, which stops the approval workflow **
** Disapproving a contract is covered in the chapter 'Limited Access – Disapprove a Contract' **</td></tr>
</table>

Approval Workflow

Introduction

Once the contract has been submitted for approval, the approval workflow begins. A notification email is sent to the first/next approver in the workflow as each approval level is completed. As each level approves the contract, the action is recorded in the **Approvals** region.

How to

Follow the steps below to complete an approval level.

Step	Action	Result
1.	Once the notification email has been received by the Contract Approver, open the email.	The email should have a subject of 'Contract Approval' and it will come from the KDADS employee that originated the contract.
2.	Three options are available to view and sign the contract. Select the appropriate option.	The Contract Approval page displays after using one of the options below.

Option	Action	When to Use
a.	Click on the View and Sign Contract link	This option does not require logging in to web applications and is for the approver that does not have a web applications account (such as a vendor) or may not be able to access the Web Applications Sign In page.
b.	Click on the View and Sign Contract and/or View Details (requires login) link	This option requires the user to have an existing KDADS Web Applications user account, and access to the Web Applications Sign In page. If the approver has the necessary security roles, he/she can not only review the contract, but can also look at the Contract Details within the application itself.
c.	Copy and paste the provided link in to the browser address bar	This is an alternative to the second option and has the same requirements.

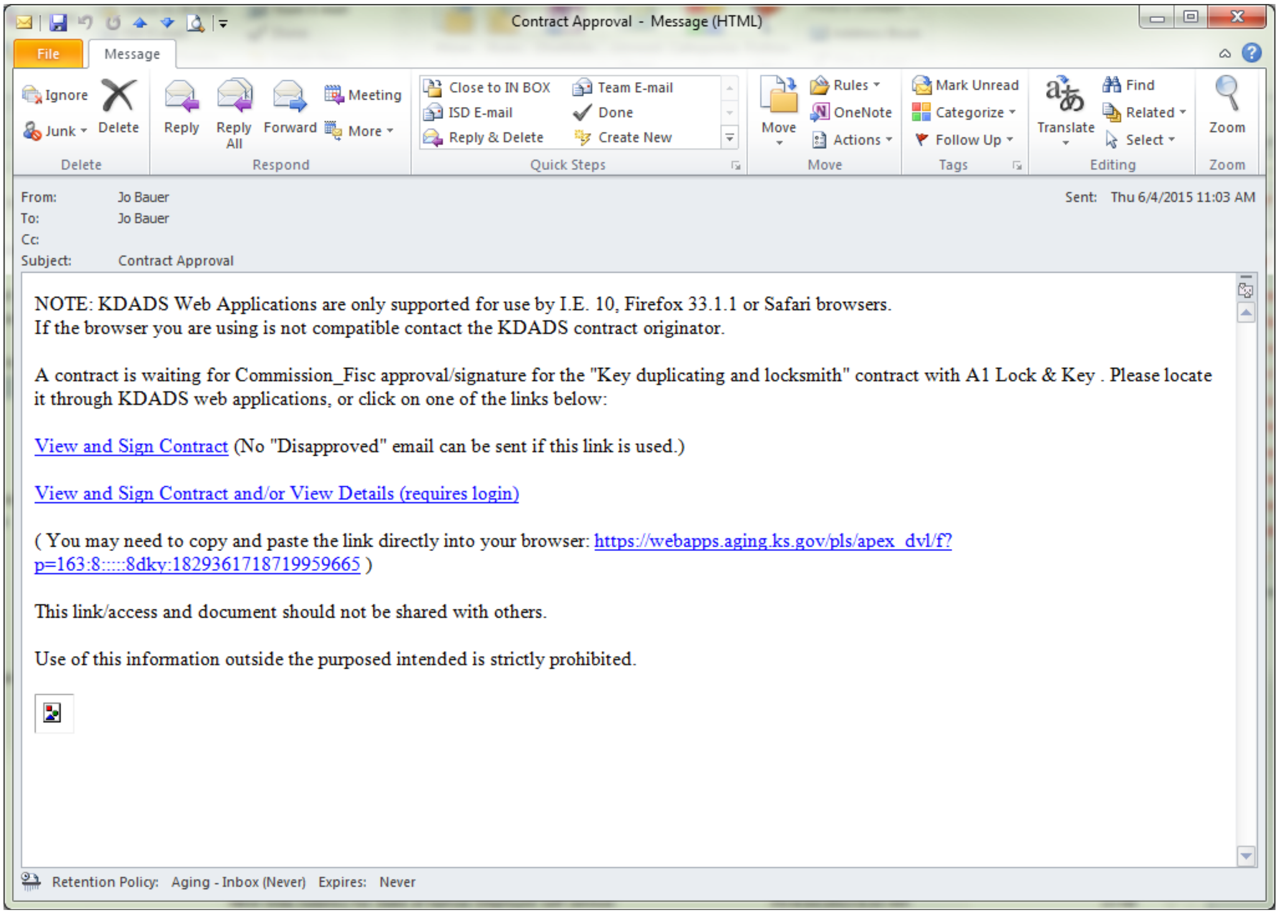
Sample email and Contract Approval page example follow.

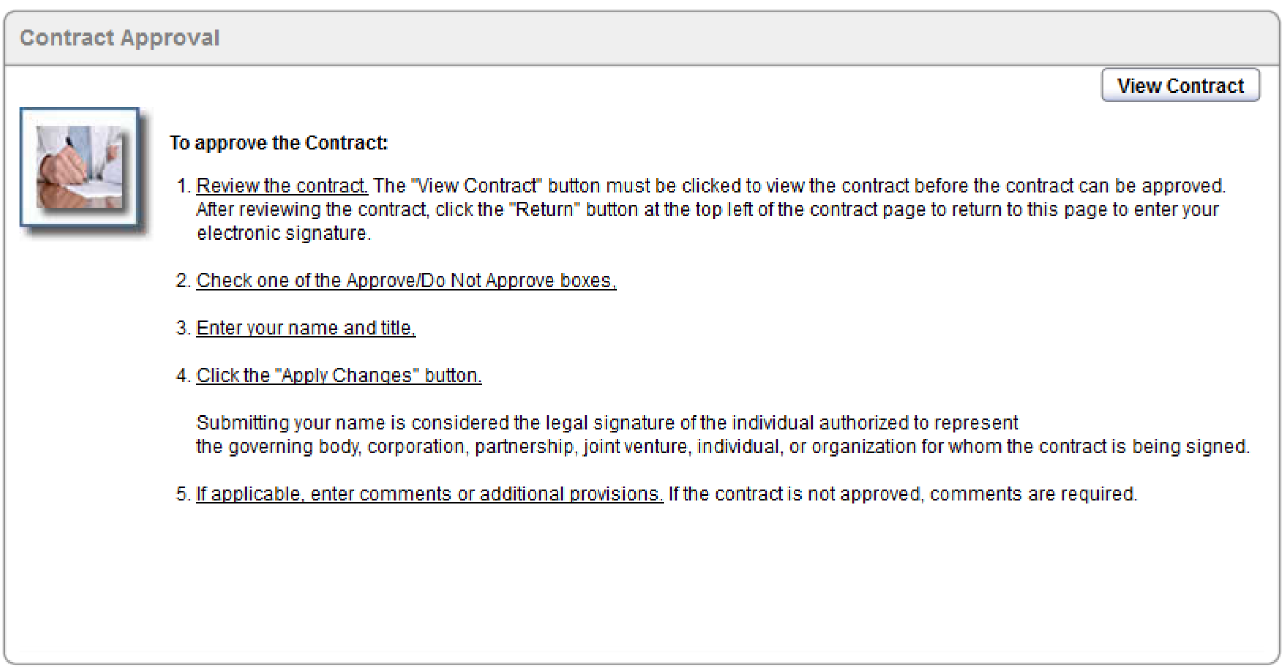
Continued on next page

Approval Workflow, continued

Print Screen Examples

Example of Contract Approval Email and Contract Approval page launched from the email link:



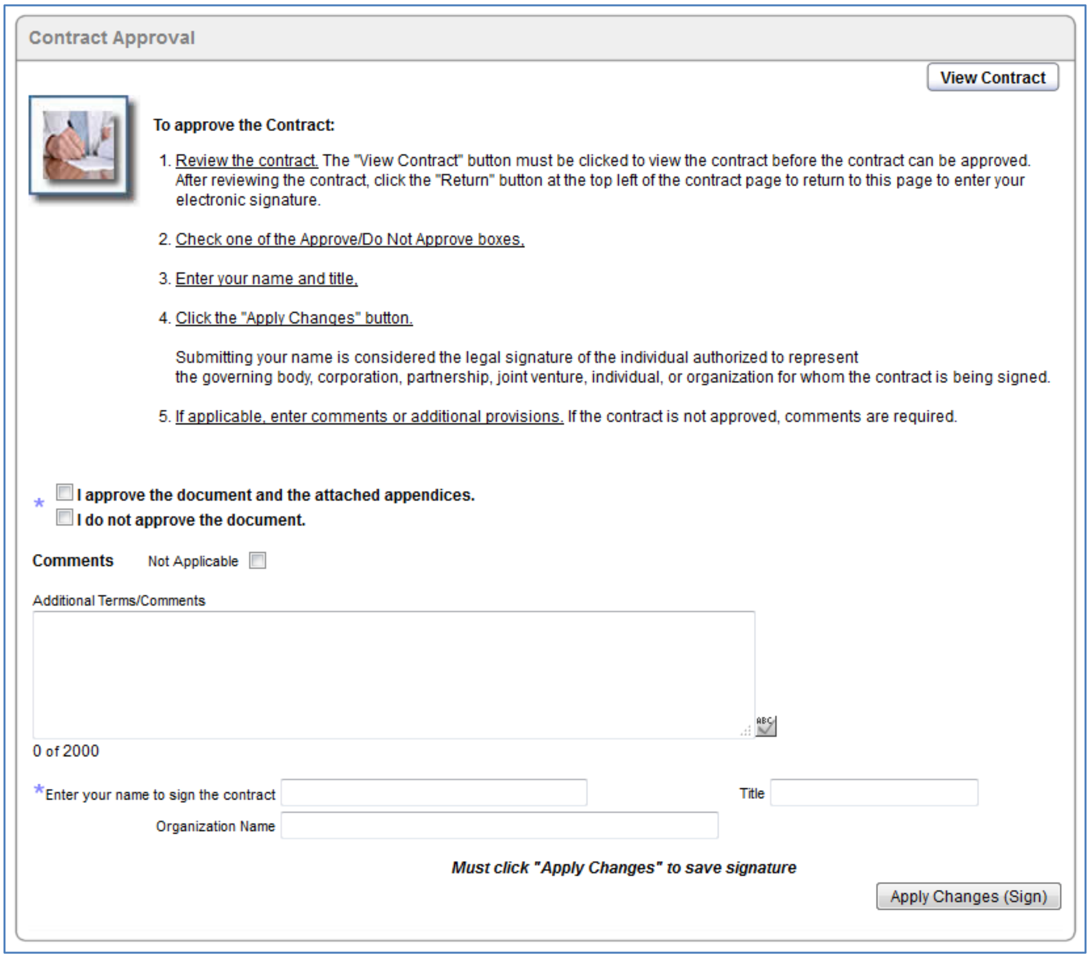


Continued on next page

Approval Workflow, continued

How to *continued*

Step	Action	Result
3.	On the **Contract Approval** page, click on the **View Contract** button in the upper right hand corner.	A print view of the full contract displays. Review the contract to determine whether it can be approved at this level.
4.	Click on the **Return** button at the top of the contract.	The Contract Approval page will display again, with additional fields to approve or disapprove the contract, enter a comment, and enter the electronic signature.



5.	Click on the appropriate **Checkbox** to either approve or disapprove the contract.	A checkmark appears in the box.
6.	Enter any **Additional Terms or Comments** as appropriate.	This is required if the contract is *not* approved.
7.	Type your name in the **Enter your name to sign the contract** text box.	What is typed here appears as the electronic signature on the contract.
8.	Type your working title in the **Title** text box.	Not required

Continued on next page

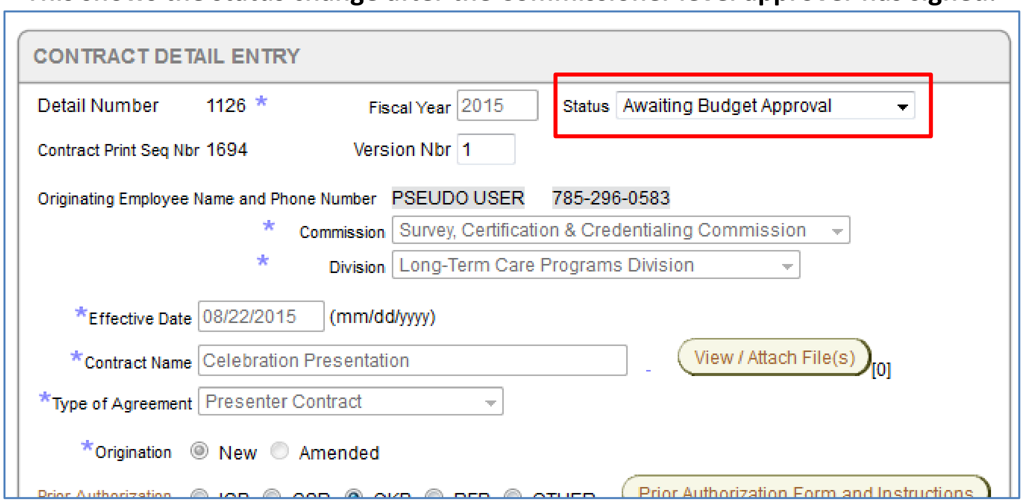
Approval Workflow, continued

How to *continued*

Step	Action	Result
9.	Enter your **Organization Name**.	Appears if the approver is not logged in to Web Applications.
10.	Click on the **Apply Changes (Sign)** button.	Saves the entries made on the Contract Approval page. Displays a confirmation/ thank you message.
11.	Close the Contract Approval window/tab	Contract approval is complete for this level.

Contract Status As each Approval level completes the previous steps, the contract status automatically changes to the next approval level.

This shows the status change after the Commissioner level approver has signed:

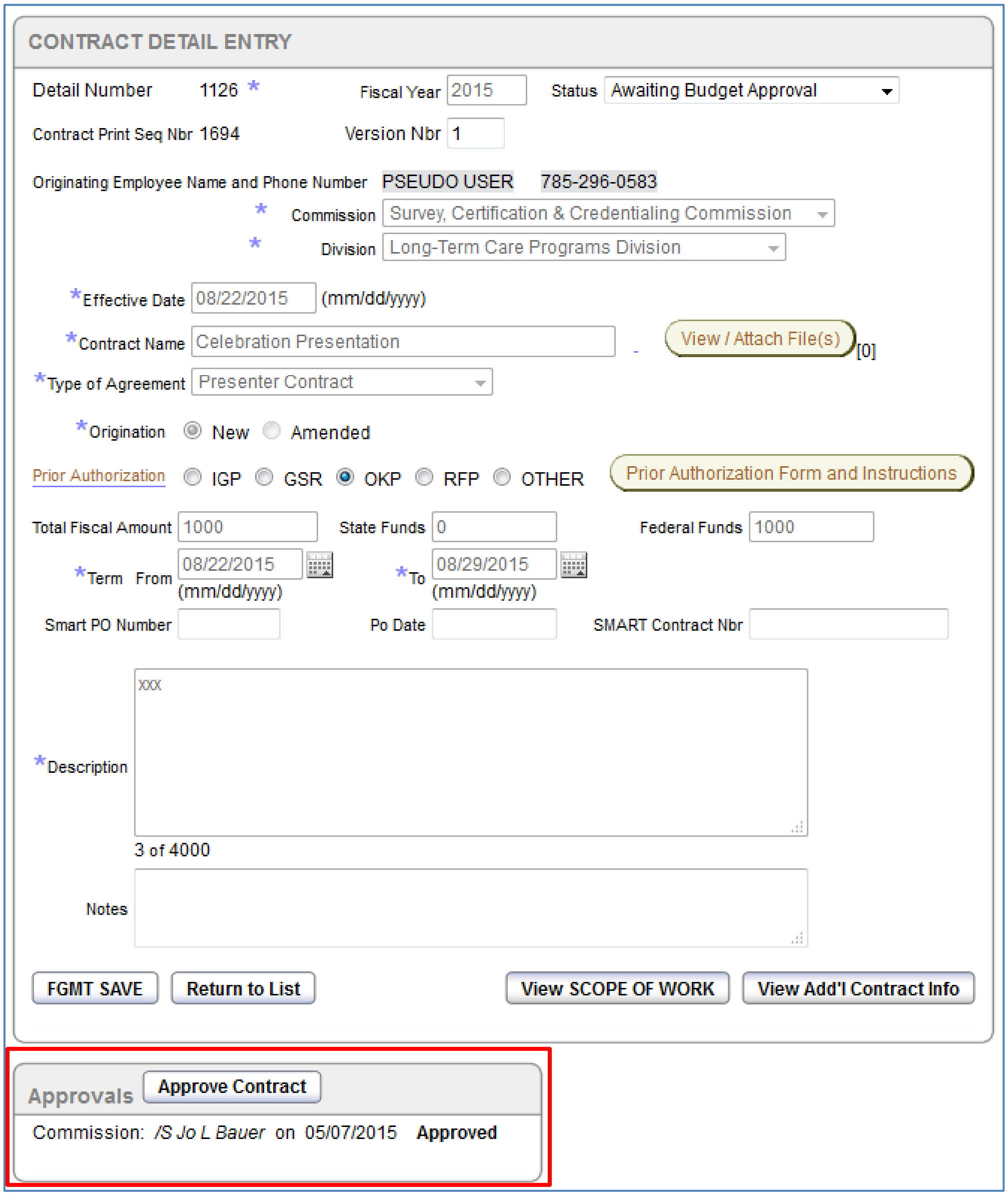


Continued on next page

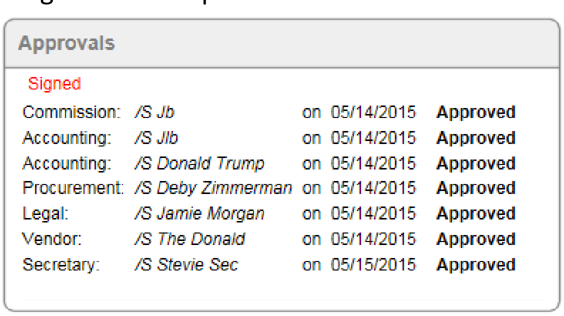
Approval Workflow, continued

Approvals region

After the first level (Commissioner) approval is completed, the **Approvals** region is updated and displays the electronic signature of the approver, the date the contract was signed, and whether the contract was approved or disapproved. As each approver level is completed, the approver's electronic signature will be added to this region.



Approvals region of a completed contract:



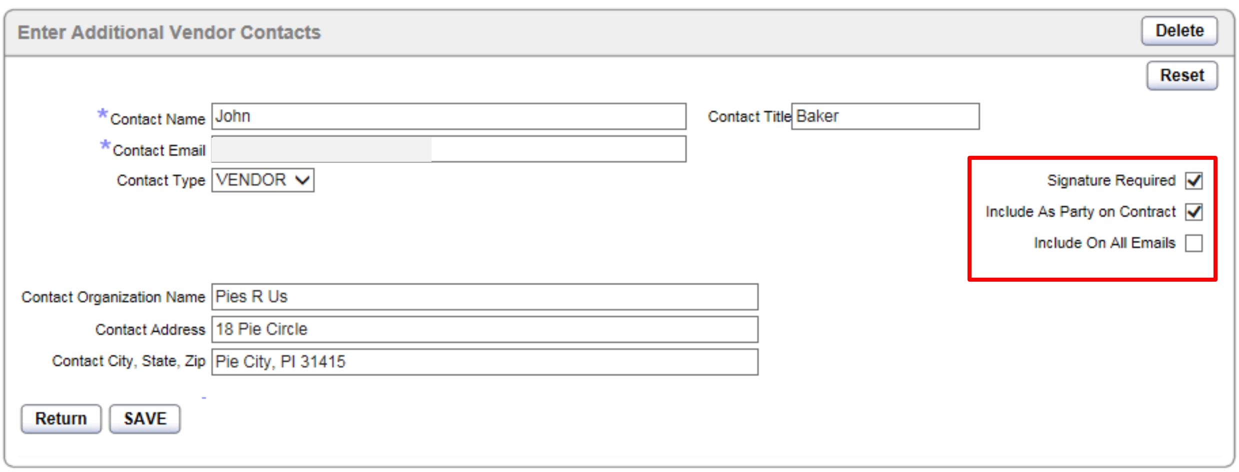
Continued on next page

Approval Workflow, continued

Special Note for *Additional Vendor Contacts* Approvals

If an Additional Vendor Contact is added to a contract, and the 'Signature Required' and 'Include As Party on Contract' boxes are checked, the following will occur:

- When the approval workflow reaches the 'Awaiting Vendor Approval' level, the notification email is sent to both the main Signatory email (contractor) *and* the additional vendor contact(s)
- The contract status will not switch from "Awaiting Vendor Approval' to 'Awaiting Secretary Approval' until all vendors have signed the contract.



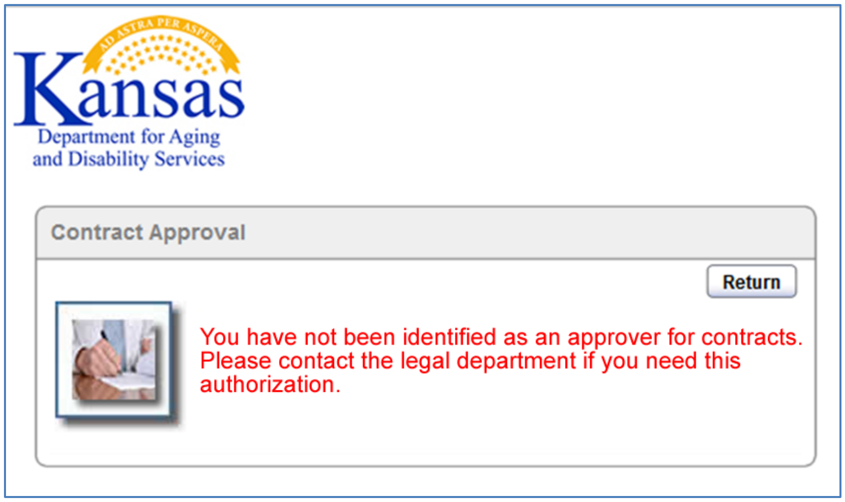
'Include On All Emails' does not have to be checked to receive the Vendor Approval notification email. That email is sent automatically based on the other two check-marked items.

Continued on next page

Approval Workflow, continued

Unauthorized Approver

If someone that is not a designated Agency Contract Approver tries to approve a contract, the following message displays.



The KDADS Legal Division is in charge of maintaining the Agency Approver list. Anyone who feels they should be able to approve contracts but is getting this message should contact the KDADS Legal Division.

Disapprove a Contract

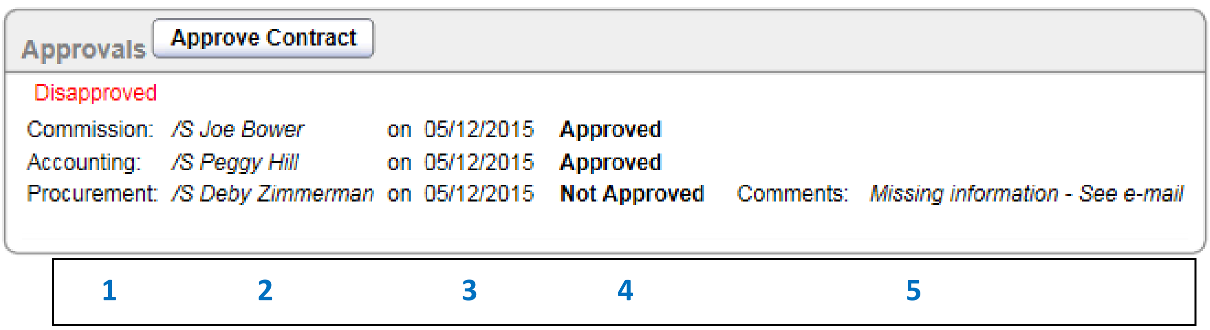
Introduction

If an approver reviews a contract and determines that the contract should not be approved as presented, the approver can 'disapprove' the contract. The approver would check the box that states 'I do not approve the document.' The approver should convey the reason for the disapproval using the Comment box in the Contract Approval screen.

Once a contract is disapproved, the contract originator can create a new version of the contract to make changes and/or correct errors. If a disapproved contract is resubmitted for approval, the approval workflow starts over at the first approval level.

Approvals region

Refer to the image below to see how a stopped Contract Approval workflow looks when an approver Disapproves a contract.



1 The Approver Level that signed
2 The name entered as the signature of the approver
3 The date the approver signed or the contract
4 Indicates the box *disapproving* the contract was checked (shown here at the Procurement level)
5 The explanation of why the contract was not approved

Disappproved Contract - Create a New Version

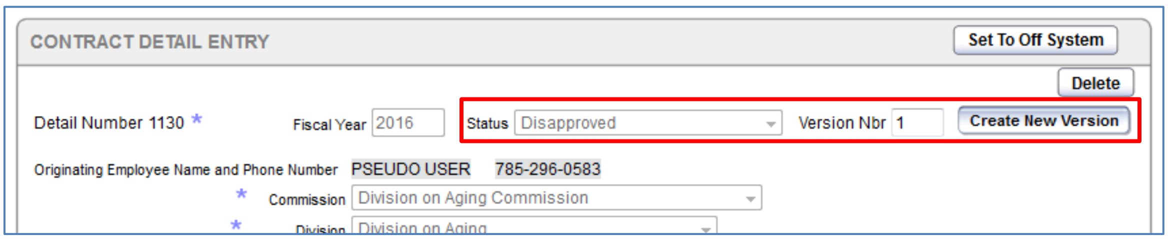
Introduction

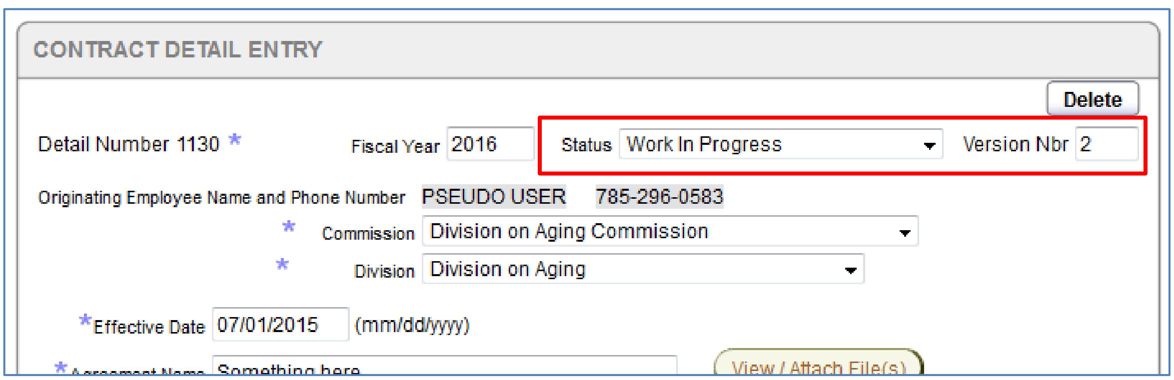
When a contract is disapproved, and the circumstances allow, a new version of the contract can be created. Changes can then be made to the contract and then resubmitted for approval.

How to

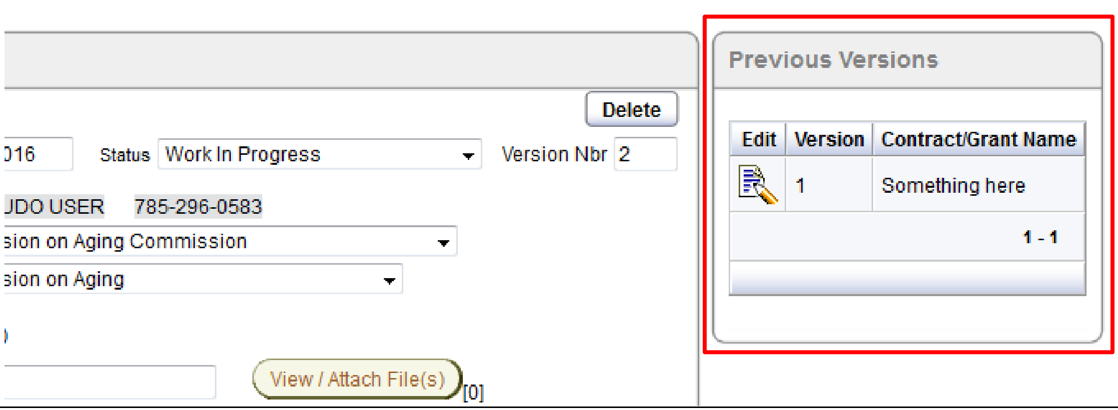
Follow the steps in the table below to create a new version of the disapproved contract.

Step	Action	Results
1.	Open the Disapproved contract (DND status on the Contracts List)	The main contract page displays. Note that the contract is still read only at this point.
2.	In the Contract Detail Entry region, click on the **Create New Version** button.	The new Version of the contract displays. Note that fields are now editable.





Step	Action	Results
3.	A new region – **Previous Versions** – is created to the right of the Contract Detail Entry region.	Lists all the previous versions of this contract.



Disapproved Contract - Create a New Version, continued

How to *continued*

Step	Action	Results
4.	All information from the current version is copied to the new version, including the Scope of Work and any Appendices.	The new version of the contract is in Work in Progress status and is ready to be updated.
5.	Make the necessary changes/corrections to the contract.	
6.	Change the contract status to 'Ready for Approval' and save the contract.	The new version of the contract is now resubmitted to the first level of the Approval workflow.

Limited Access (Contract Originator) – Off System Signatures

Introduction

The Off System feature has been added to the Contracts application so signatures can be obtained manually with a paper copy of the contract. This allows the approval workflow to continue if an approver is unable to access the online Contracts application to provide an electronic signature. Only the contract originator can use the Off System process.

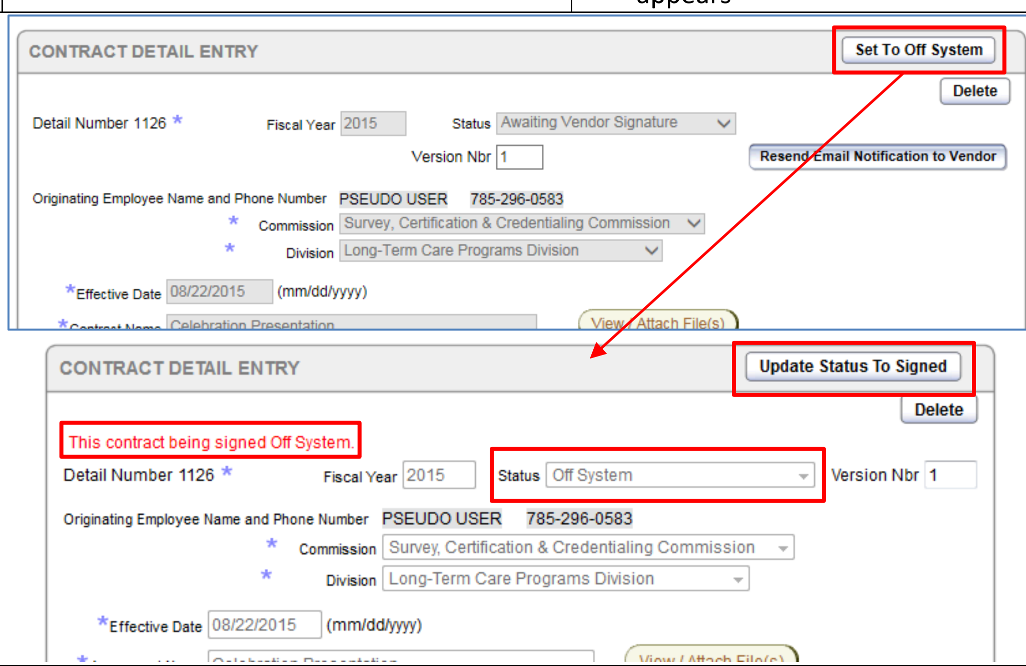
The contract originator sets the status of the contract to 'Off System' to indicate the signatures are being obtained manually. Once a contract is set to Off System, the rest of the signatures in the approval workflow must be obtained via the paper contract.

Once all signatures have been obtained, the contract will be scanned to a PDF file, uploaded to the online contract, and the online contract status set to 'Signed.' This will initiate the auto-email notification that is sent to the contract originator, Procurement Officer, and FISC Accounting Manager. The contract originator can then use the 'Email Contract to Vendor' button to notify the vendor.

How to

Follow the steps in the table below to complete a contract's approval cycle using **Off System** status.

Step	Action	Result
1.	Open the contract using the View Contracts icon on the Contracts List.	The main contract page displays. **Note**: The contract must be in at least 'Awaiting Commission Approval' status.
2.	Click on the **Set To Off System** button located at the top of the Contract Detail Entry region.	• The contract fields are read only • An informational message states the contract is being signed Off System. • The Status is changed to 'Off System' • A new 'Update Status To Signed' button appears



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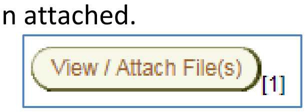
Limited Access (Contract Originator) – Off System Signatures, continued

How to *continued*

Step	Action	Result
3.	Click on the **View Add'l Contract Info** button	The Additional Contract Information page displays.
4.	Click on the **View Contract** button.	The Print View of the contract displays.
5.	Print the contract using the instructions at the top-left of the contract.	A hard copy of the contract is created.
6.	Obtain the signatures of the remaining Approvers.	All remaining approver signatures must be obtained offline (manually).
7.	Legal staff: Using ImageNow, scan the contract into the Legal Division filing system.	The completed paper contract is scanned to an electronic PDF file.
8.	Access the Contracts web application and from the Contracts List, open the still 'Off System' contract.	The main contract page displays.
9.	Click on the **View / Attach File(s)** button in the Contract Detail Entry region.	This region is always available, even if the contract itself is read only. The **Attach / Upload File** page opens in a new tab or window.
10.	Browse to the location where the PDF file of the contract was saved and open the file.	The full path and file name of the contract appears in the **Source file** field of the Attach/Upload File page.
11.	Enter a short descriptive name for the contract in the supplied text box.	The name appears in the **Document (short descriptive name)** field.
12.	Click on the **Upload or Delete File** button	The Uploaded Files table appears, providing information on the uploaded file.

13.	Close the Attach / Upload File window.	The Contract Maintenance Detail page redisplays, showing the number of files that have been attached.



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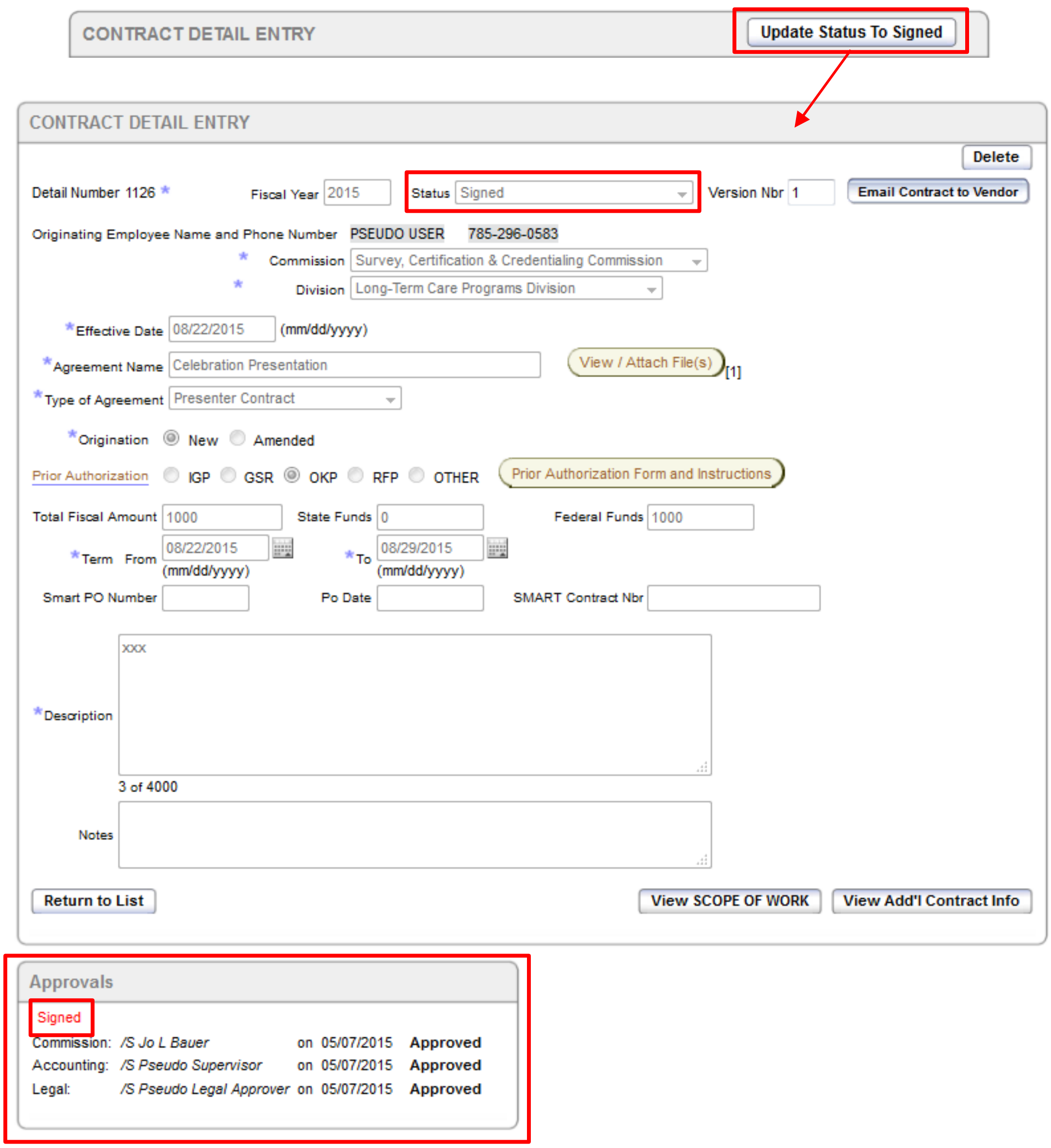
Limited Access (Contract Originator) – Off System Signatures, continued

How to *continued*

Step	Action	Result
14.	Click on the **Update Status To Signed** button.	• The contract status changes to 'Signed' • The Approvals region shows only signatures obtained electronically before the contract was switched to 'Off System.' • A red 'Signed' message appears to indicate the Approvals region is complete.



Signed Contract

Introduction

Once the contract approval process is completed with the Secretary of KDADS' signature, whether obtained via electronic signatures or Off System, the contract originator, Procurement Manager, and FISC Accounting Manager should receive a notification email indicating the contract has been approved and signed.

Notifying the Vendor

When the contract originator opens the Signed contract, the Contract Detail Entry region will contain a button labeled 'Email Contract to Vendor.' Clicking on this button sends an email to the Vendor with a link to view the signed contract.

How to

Follow the steps in the table below to send the signed contract to the Vendor.

Note: This 'How to' is relevant only for the contract originator.

Step	Action	Result
1.	Open the notification email that states the contract is in 'Signed' status and use the link in the email to open the contract OR From the Contracts application, open the contract from the Contracts List.	The contract's main page displays.
2.	In the Contract Detail Entry region, click on the **Email Contract to Vendor** button.	A confirmation message appears at the top of the page indicating **'Notification email sent.'**

Email Notifications

Introduction

There are several events that trigger an automatic email notification. When the event occurs, the system automatically sends an email notifying the affected parties involved to take an action.

Events that trigger an email notification:

- Contract status changes to a new level of approver signature
- Contract status changes to 'Signed'
- Contract is disapproved, a new version is created, and the approval workflow starts over
- The contract originator re-sends an email notification using a button supplied for this purpose

Due to how some mail servers handle emails coming from KDADS' web applications, it is possible not all recipients will receive an email notification sent to them. If there is an unexplained delay in the approval workflow, the contract originator should ensure that communication between KDADS and all involved parties has not been interrupted.

Notifications

Refer to the table below to see when notifications are sent, who gets the email notification, and the information that is provided.

Event	Who Gets an Email	What it Contains
a. Contract status changes to a new 'Awaiting (approver level) Signature'	• The Approver as defined on the Update Agency Approver page for that approver level. • If an alternate Approver is defined at this approver level, the alternate(s) get the email also.	The email notifies the approver that a contract is waiting for their signature. The email contains links to the contract signature page.
b. Contract status changes to 'Signed'	• The Contractor Signatory • Additional Contacts that were added and marked to receive all emails • The contract originator • Procurement Manager • Alternate Procurement Manager • FISC Accounting Manager	The email notifies the recipients that the contract is approved and signed, and provides a link to view and print the contract.
c. Contract is disapproved, a new version is created, and the approval workflow starts over	Same as 'a.' above	Same as 'a.' above
d. Contract originator re-sends an email notification using a button supplied for this purpose	The same parties that received the original email	The same email is sent as the original, so the content is the same as the original
1. Contract originator uses the 'Email Contract to Vendor' button to re-send the email after a contract is in Signed status; option b. above is repeated 2. Contract originator uses the 'Resend Email Notification to Vendor' button when the status is 'Awaiting Vendor Signature;' option a. above is repeated.		

Limited Access (Legal Division) – Update Agency Approvers

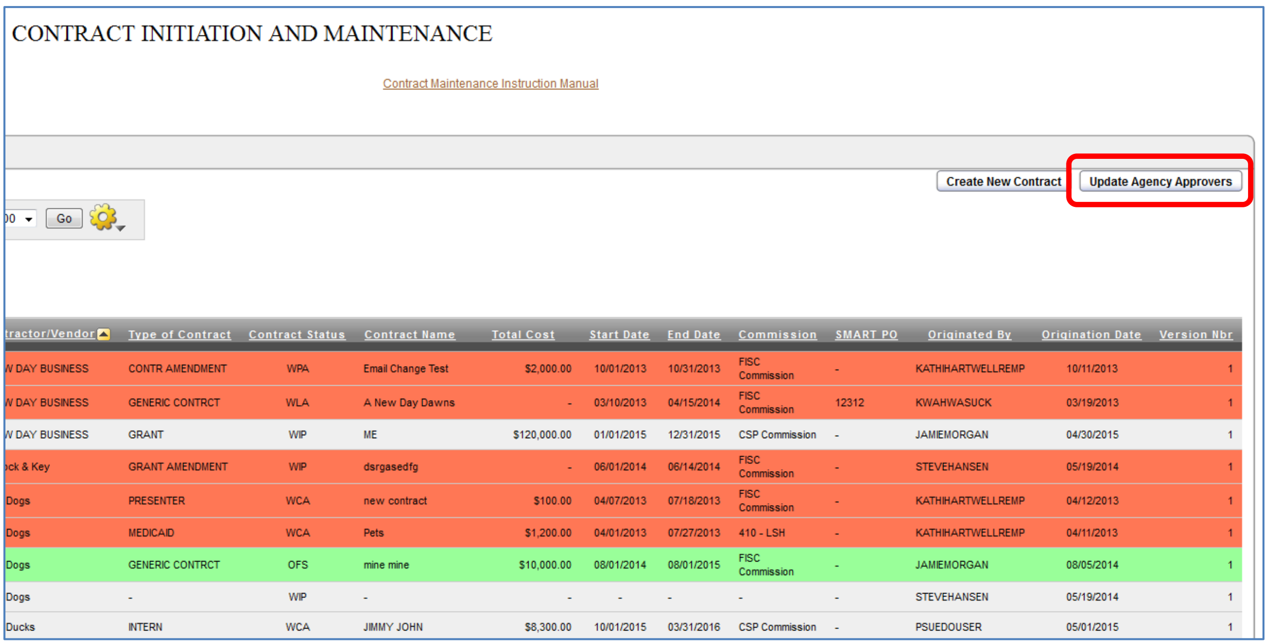
Introduction

The Legal Division is responsible for maintaining the KDADS Approvers list for the Contracts application.

How to

Follow the steps in the table below to assign primary and alternate approvers using the Update Agency Approvers feature.

Step	Action	Result
1.	On the Contracts List, click the **Update Agency Approvers** button.	The Update Agency Approvers page displays.



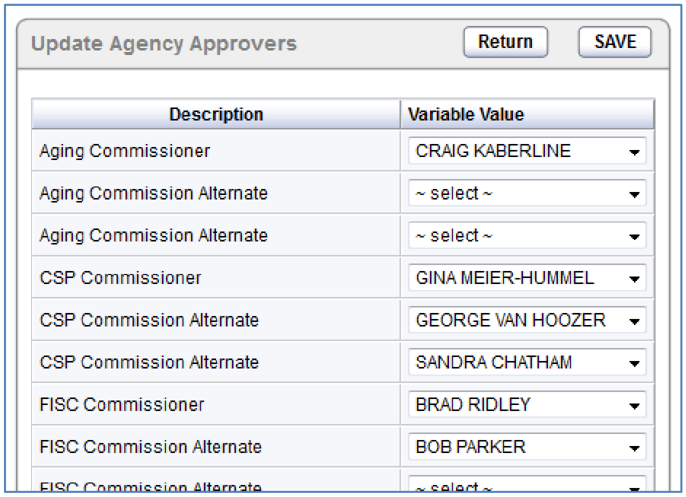
Step	Action	Result
2.	For each Approval Area, select the primary approver from the drop-down list. Note: If desired, up to two alternate approvers in each Approval Area can be selected, but they are not required.	The persons in the drop down field are those that have the security access role for Contract Approvals. The Legal Division will work with the KDADS Help Desk to assign the Approval role to the appropriate staff.

Continued on next page

Limited Access (Legal Division) – Update Agency Approvers, continued

How to *continued*

Step	Action	Result
3.	Click on the **SAVE** button to save the selections.	The changes are saved.



4.	Click on the **Return** button to return to the Contracts List.	The Contracts List displays.

Facilities Management (Procurement) – Add New Contractor/Vendor

Introduction

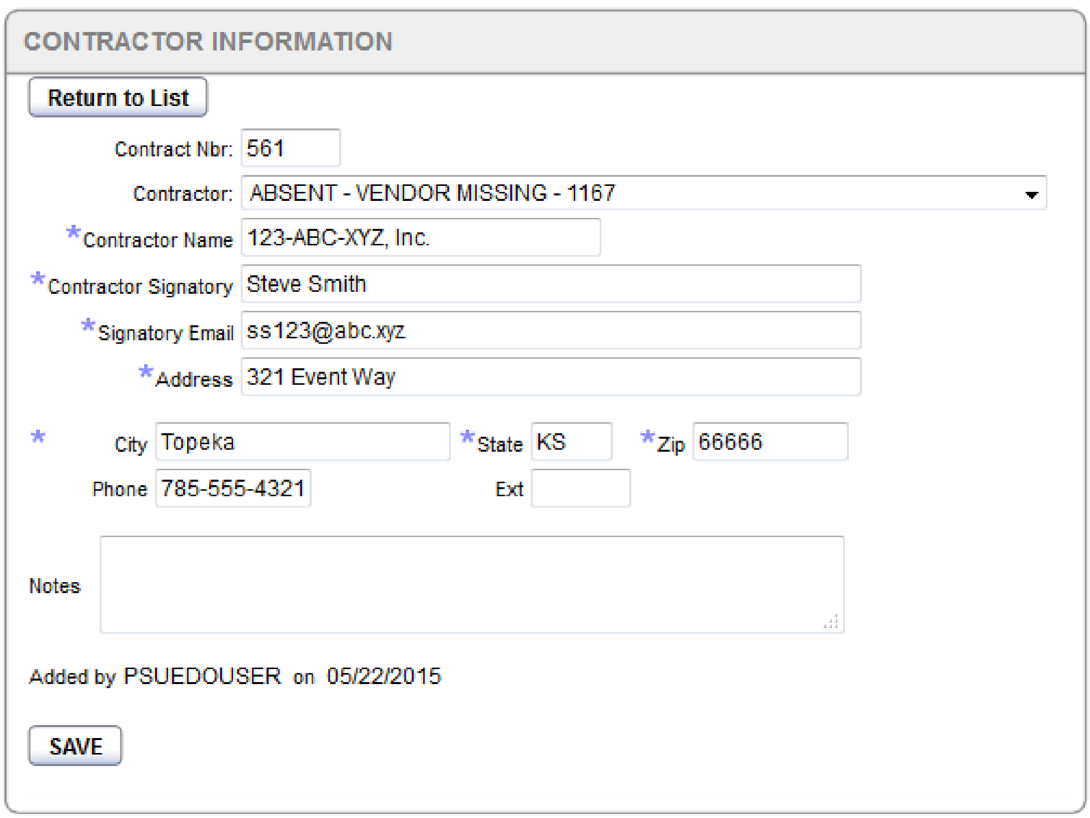
This chapter is for KDADS Procurement staff only.

Since most contracts are accompanied by a Purchase Order, Contracts utilizes the vendor listing from the KDADS Purchasing web application. If a new Contractor/Vendor is being used in a contract, the Procurement unit can automatically add the new vendor to the Purchasing application from within Contract Maintenance.

How to

Follow the steps in the table below to add a new contractor.

Step	Action	Result
1.	Contract originator has selected “ABSENT – VENDOR MISSING” as the contractor and completed the Contractor information.	



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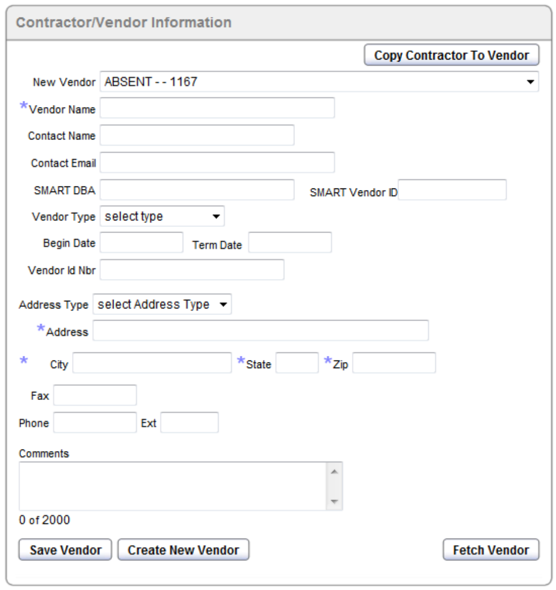
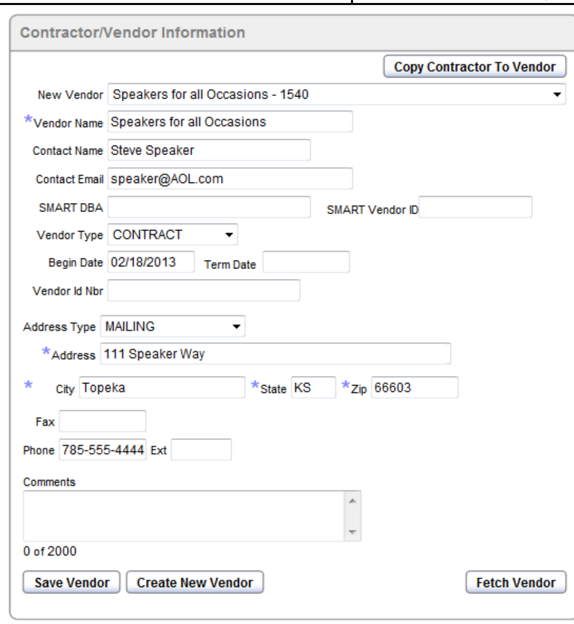
Facilities Management (Procurement) – Add New Contractor/Vendor, continued

How to *Continued*

Step	Action	Results
2.	With the appropriate security access, a Contractor/Vendor Information region is available.	It will initially display any information associated with the contractor selected. In this example, ABSENT is selected.



Step	Action	Results
3.	Click on the **Copy Contractor To Vendor** button.	The information from the Contractor Information region is copied.



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Facilities Management (Procurement) – Add New Contractor/Vendor, continued

How to *Continued*

Step	Action	Results
4.	Complete or change any information as required for procurement.	Any information changed in the Contractor/Vendor Information region will display in the Contractor Information region once the contractor is created.
5.	Click on the **Create New Vendor** button to add the Contractor as a Vendor.	Contractor will be assigned a KDADS Vendor number and is now also available in the Purchasing application.

Facilities Management (Procurement) – Update Contractor/Vendor Information

Introduction

If the contract originator selects a contractor from the vendor listing, the current listing may not have complete or updated information. The information can be updated and then copied to the Purchasing system automatically.

How to

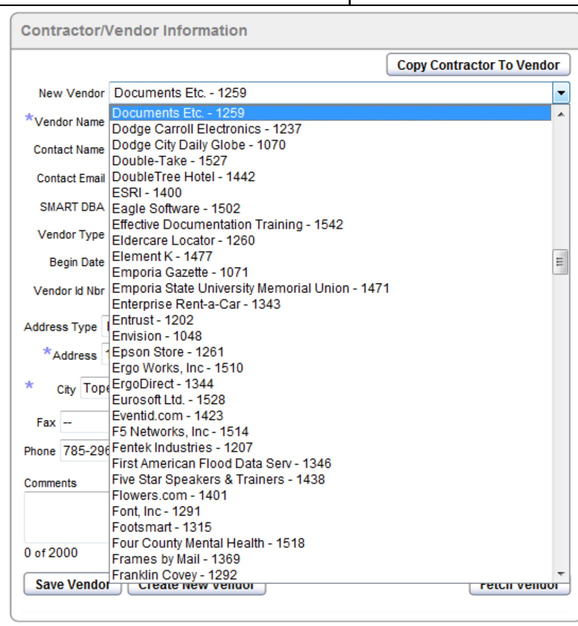
Follow the steps in the table below to update information on an existing contractor.

Step	Action	Result
1.	Contract originator selects an existing vendor and has updated the missing information.	
2.	Click on the **Copy Contractor To Vendor** button.	The information from the Contractor Information region is copied.
3.	Click on the **Save** button to update the vendor information.	

Facilities Management (Procurement) – Change Vendor on Contract

Introduction The contractor can be changed if during procurement review, it is determined that the vendor needs to be changed.

How to Follow the steps in the table below to change the contractor selected in the Contractor Information region.

Step	Action	Result
1.	Contract originator selects an existing vendor; however, another vendor needs to be selected.	
2.	Click on the **New Vendor** drop down field.	The listing of existing vendors is displayed.
3.	Select the correct vendor.	
		
4.	Click on the **Fetch Vendor** button.	The newly selected vendor information is displayed in the Contractor/Vendor Information region.
5.	Click the **Save Vendor** button.	The new vendor is now displayed in the Contract Information region.

Contracts List

Introduction

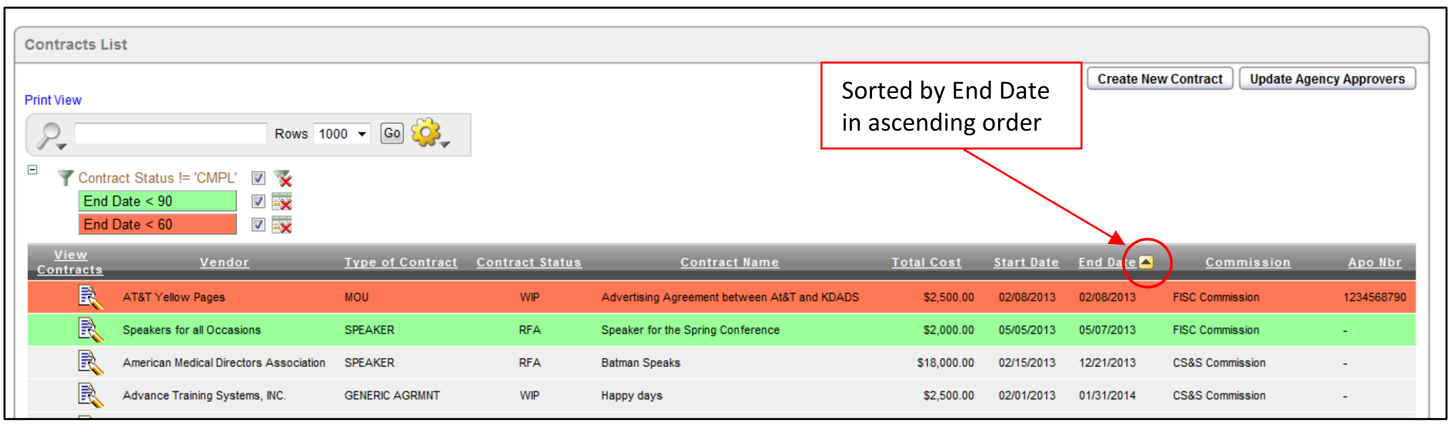
All Contracts are listed on the Contracts List. The contracts List indicates any contract that is close to expiring by highlighting the contract record in the list:

- Green indicates the contract will expire in less than 90 days
- Red indicates the contract will expire in less than 60 days

Quick Steps to select information:

- Click on the pencil/paper icon under the View Contracts column to open the contract. The Contract Detail Entry page displays.
- Click on any column heading for a quick sort or filter of the information.

For more detailed reporting capabilities, use the Interactive Report's reporting tools, as described in the next chapter.



Contracts List – Using Interactive Report Functions

Introduction

Many KDADS Web Applications contain various types of lists and reports that use the Interactive Report feature. The Contracts application uses Interactive Reports in its Contracts List, allowing the user to create custom views of the list.

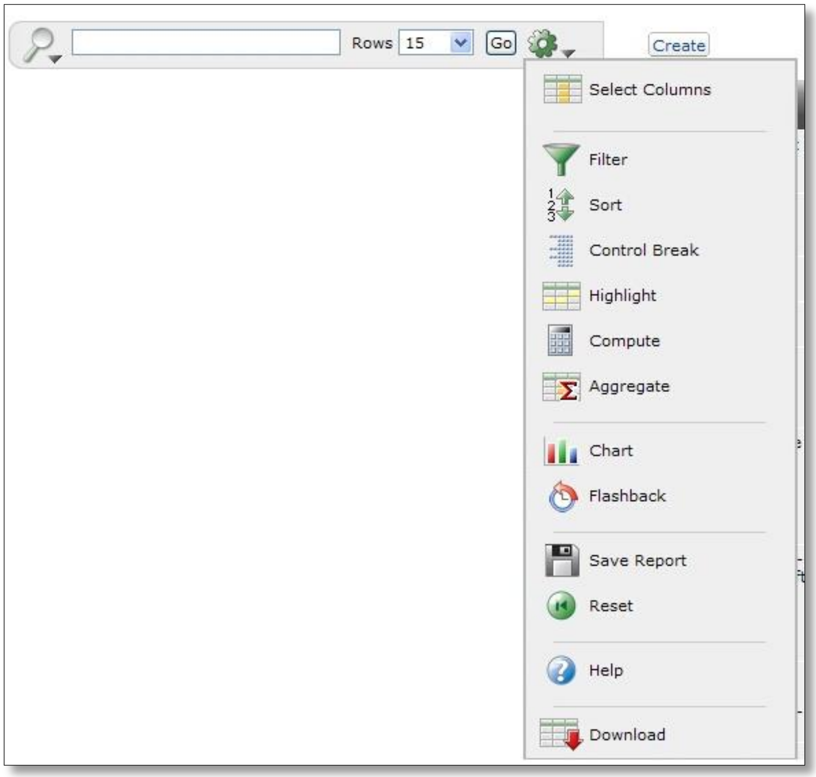
The following chapters will cover the more commonly used reporting tools.

Features

Below are the more commonly used reporting tools features offered by interactive reports.

How to

1. Open the Web Application at the Interactive Report view.
2. Click on the gear icon.
3. Report Control List will display.



Functions Covered

This instruction guide will cover only the most commonly used report functions. Those functions are Filter, Sort, and Reset.

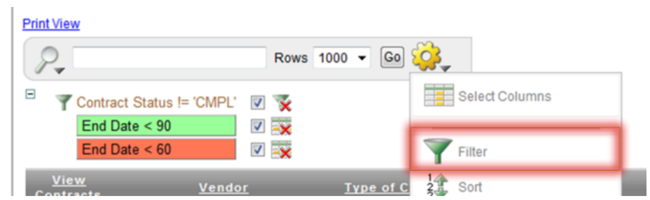
Contracts List – Descriptions

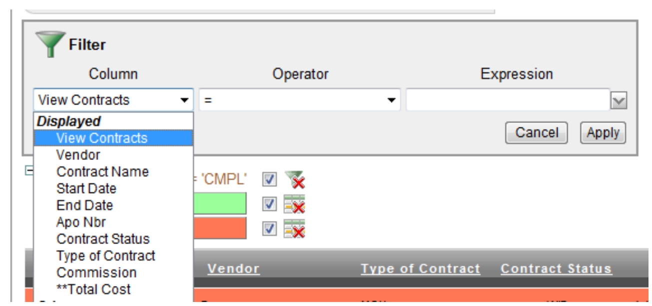
Functions Below are the descriptions of the functions available in an interactive report.

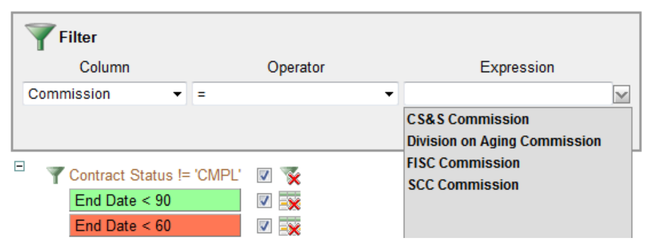
Reporting Control List	Action
	**Select Columns** – Used to modify the columns displayed. The columns on the right are displayed. The columns on the left are hidden. You can reorder the displayed columns using the arrows on the far right. Computed columns are prefixed with **.
	Filter – Used to filter data for a more detailed view of information.
	Sort – Used to change the column(s) to sort on and whether to sort ascending or descending. You can also specify How to handle nulls (use the default setting, always display them last or always display them first). The resulting sorting is displayed to the right of column headings in the report.
	Control Break – Used to create a break group on one or several columns. This pulls the columns out of the Interactive Report and displays them as a master record.
	Highlight – Highlighting allows you to define a filter. The rows that meet the filter are highlighted using the characteristics associated with the filter.
	Compute – Computations allow you to add computed columns to your report. These can be mathematical.
	Aggregate – Aggregates are mathematical computations performed against a column. Aggregates are displayed after each control break and at the end of the report within the column they are defined. Only numeric columns will be displayed.
	Chart – You can include one chart per Interactive Report. Depending upon the data in the report, the chart function may not be useful.
	Flashback – Not available.
	Save Report – Saves the customized report for future use. You provide a name and an optional description. A tab will be displayed for each report saved.
	Reset – Restores report to the default settings.
	Help – On-line Help on report functions.
	Download – Allows the current report to be downloaded. The download formats is CSV, which can be opened through Excel.

Contracts List – Filter

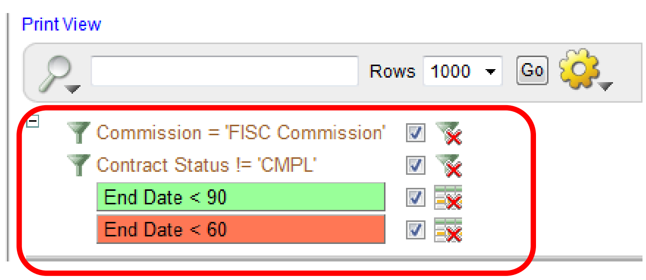
How to Follow the steps in the table below to filter a Report.

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>1.</td><td>Select Filter from the Control list.</td><td>


</td></tr>
<tr><td>2.</td><td>Select the Column to filter
Select the Operator</td><td>


</td></tr>
<tr><td>3.</td><td>Select the Expression.
• By clicking on the drop down arrow at the end of the express field, options will appear if appropriate.</td><td>


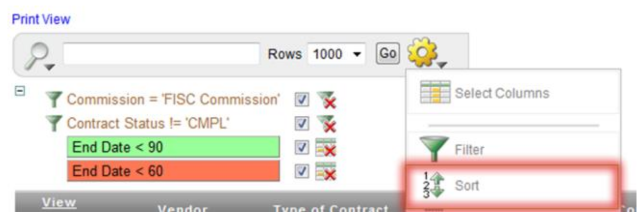
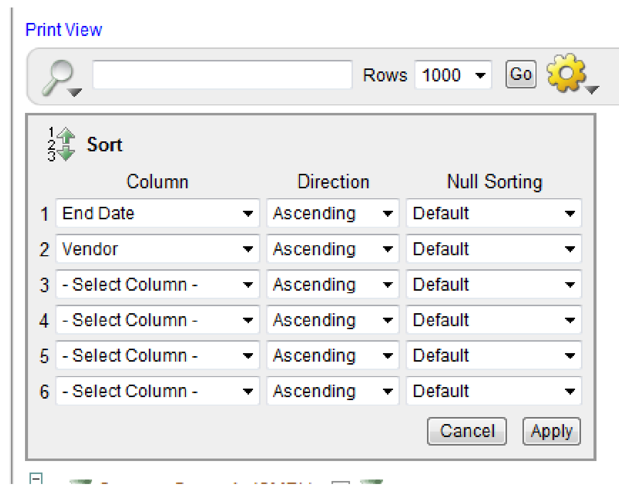
</td></tr>
<tr><td>4.</td><td>Click on the "Go" button.
Report will display.

The filter criteria will display at the top of the report.</td><td>


</td></tr>
</table>

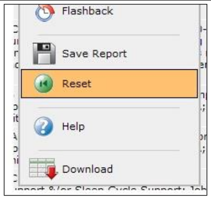
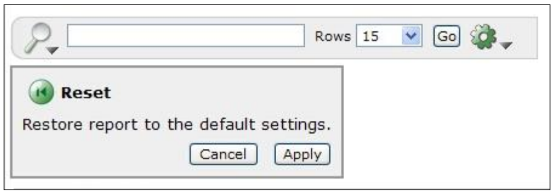
Contracts List – Sorting

How to Follow the steps in the table below to sort a Report.

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>1.</td><td>Select Sort from the Control list.</td><td>
</td></tr>
<tr><td>2.</td><td>Select the Column(s) to be sorted.
Select the Direction (Ascending or Descending)
Select how the Blank Fields (nulls) should be displayed.</td><td>
</td></tr>
<tr><td>3.</td><td>Click on Apply. Report will display.</td><td></td></tr>
</table>

Contracts List – Reset Report

How to Follow the steps in the table below to reset the Report back to default.

Step	Action	
1.	Select **Reset** from the Control list.	
2.	Click on the **Apply** button to reset the report.	

Logging-Out

Introduction When the user will not be using the application for a period of time, log out of the program for security reasons.

How to Follow the steps in the table below to exit the application.

Step	Action	Result
1.	In the upper right corner of the window, there are three navigational options.	

Link	Action
Logout	The browser will return to the Log-in page
KDADS Home Page	Returns back to the KDADS Home Page for further access options.