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BUYER USER GUIDE

Contract Register

Version One: April 2011

DELTA eSourcing

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Glossary of Terms

Contract Record
All details relating to a particular Contract Award Notice.

Contract Register
A list of all Contract Records held within Delta eSourcing.

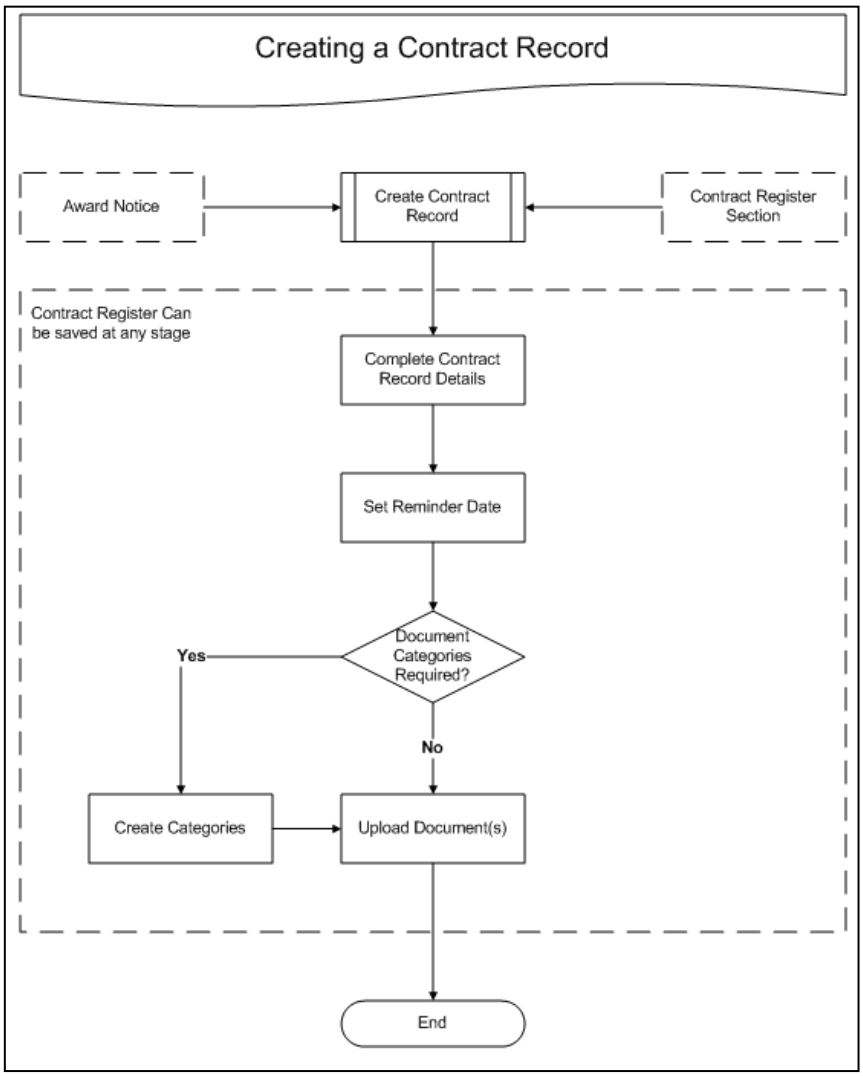
Contract Reminder
A date specified and set by you to alert you to a specific contract.

Contract Manager
The main module within Delta eSourcing which houses Contract Register.

Contract Register Overview

Contract Register is a module within Contract Manager and provides a central repository facilitating the registration, promotion and monitoring of all your organisation's contracts and agreements.

Forming an important part of the audit trail, Contract Register allows your organisation to demonstrate that it has adhered to legislative requirements regarding the tendering process. It provides buyers with data on which to plan, such as contract expiry dates, and the resources required for re-tendering. It also offers the scope for achieving better value through the aggregation of requirements.



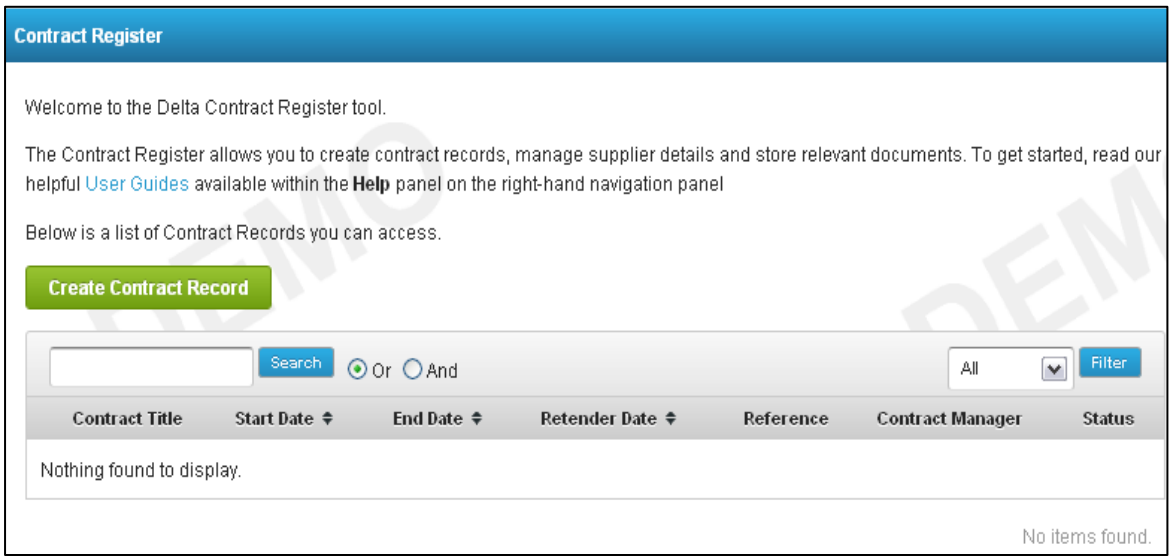
NB: This guide is based on creating a Contract Record from Contract Manager. Content from your Contract Award Notice will not be populated in any section.

Contract Records

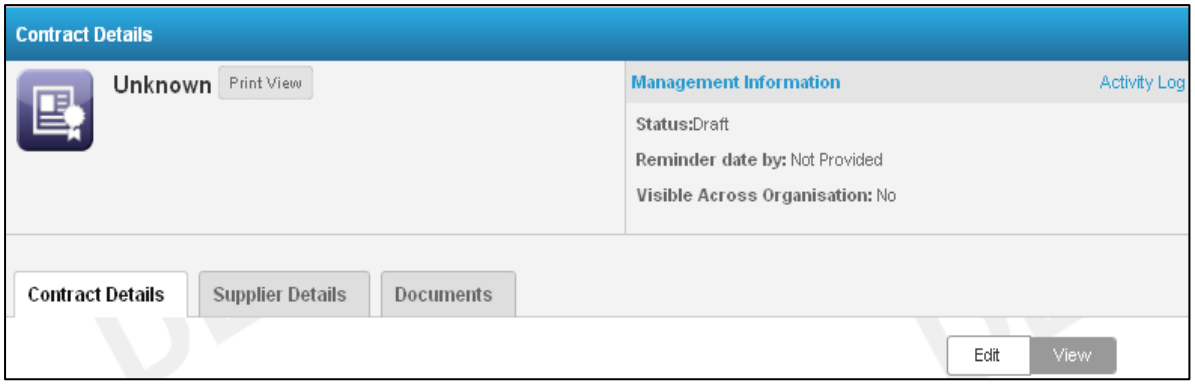
Creating a Contract Record

To create a new Contract Record, click 'Contract Manager' from the dashboard. This will take you to the Contract Register section and will allow you to proceed.

Click 'Create Contract Record' to begin.



There are three main sections of a Contract Record – Contract Details, Supplier Details and Documents. There are sections marked 'required' which are mandatory to complete the record, this isn't necessarily information that is mandatory in the Contract Award Notice.



Contract Details includes the following:

Contract Details | Supplier Details | Documents

Edit | View

To proceed with your Contract Record you will have to complete the required fields at a minimum. The more information you complete, the more comprehensive your final record will be.

Buyer Contact Details

Name REQUIRED | Email | Phone Number

Contract Details

Contract Title REQUIRED

Description

Keywords

Total Contract Value | Annual Value | Currency

Nature of Contract | Procedure | Framework: Yes No

Reference Number

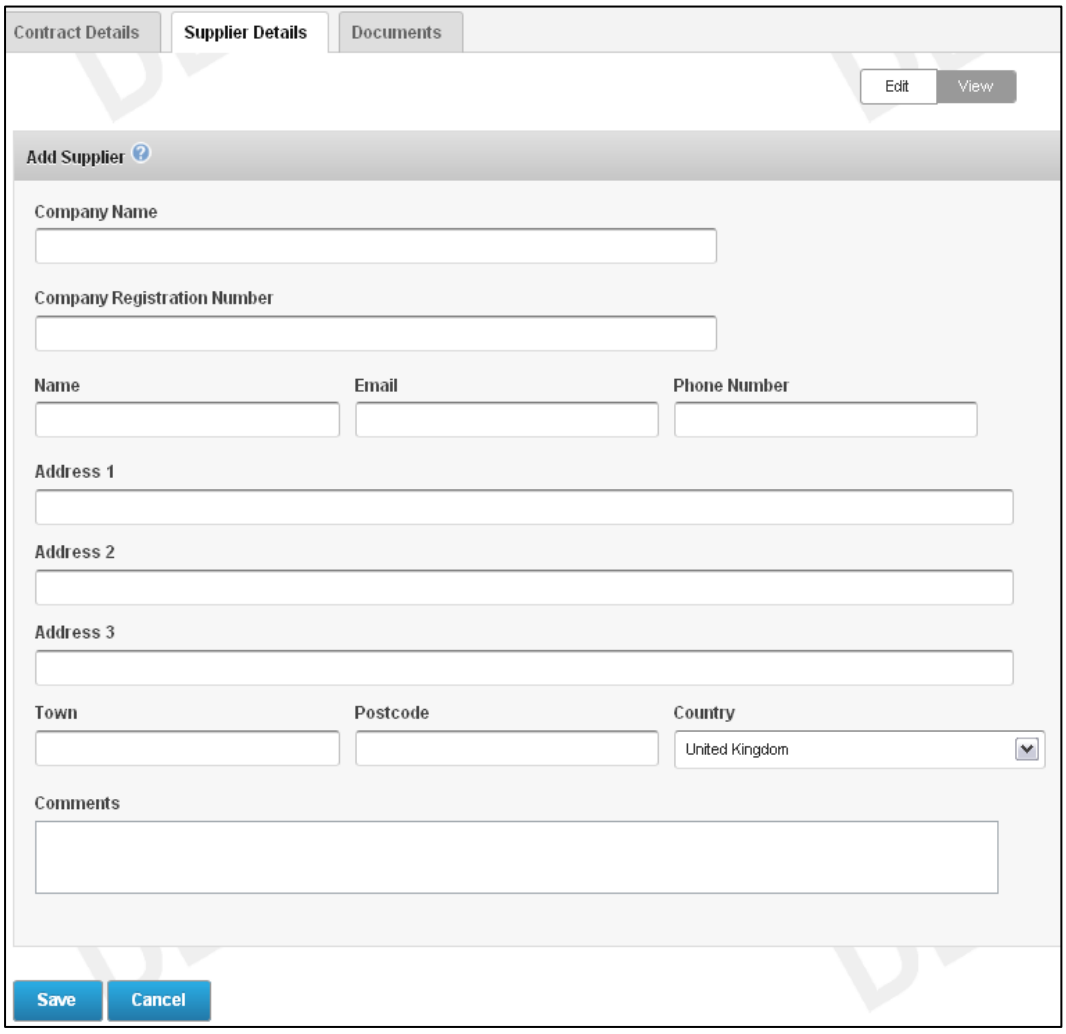
Dates

Start Date REQUIRED | End Date REQUIRED | Retender Date | Extension Period

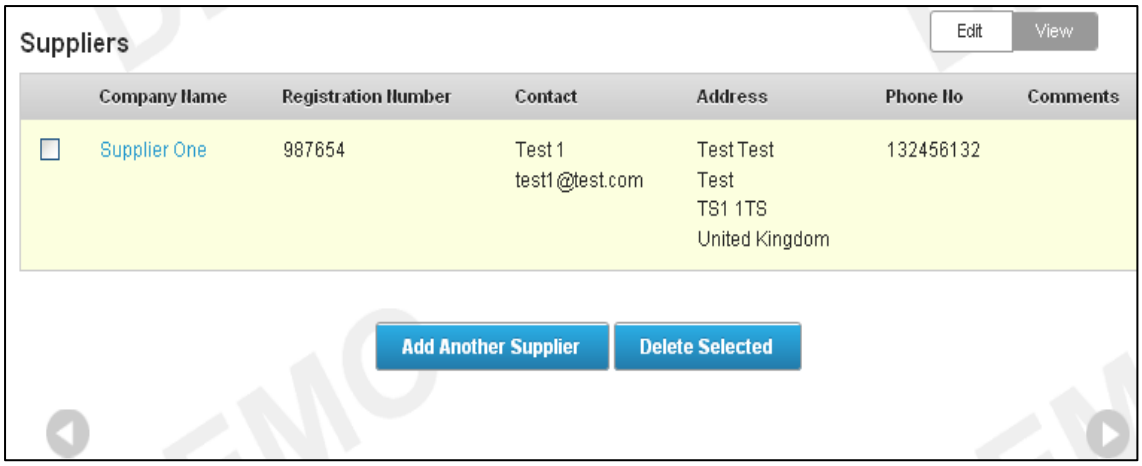
Comments

Save | Save and Continue

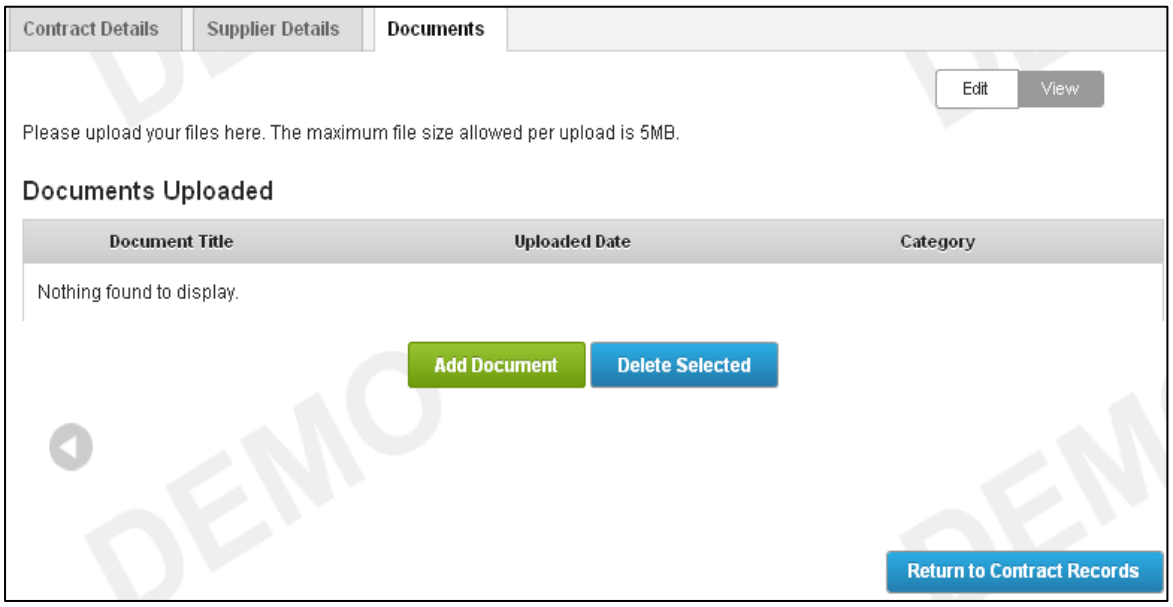
Supplier Details allows you to add one or more suppliers to the Record. Complete the fields and click 'Save' to store.



Once you have saved the information, you will be shown a confirmation screen which allows you to delete or add another supplier. To continue to the Documents section, click on the bottom right arrow.

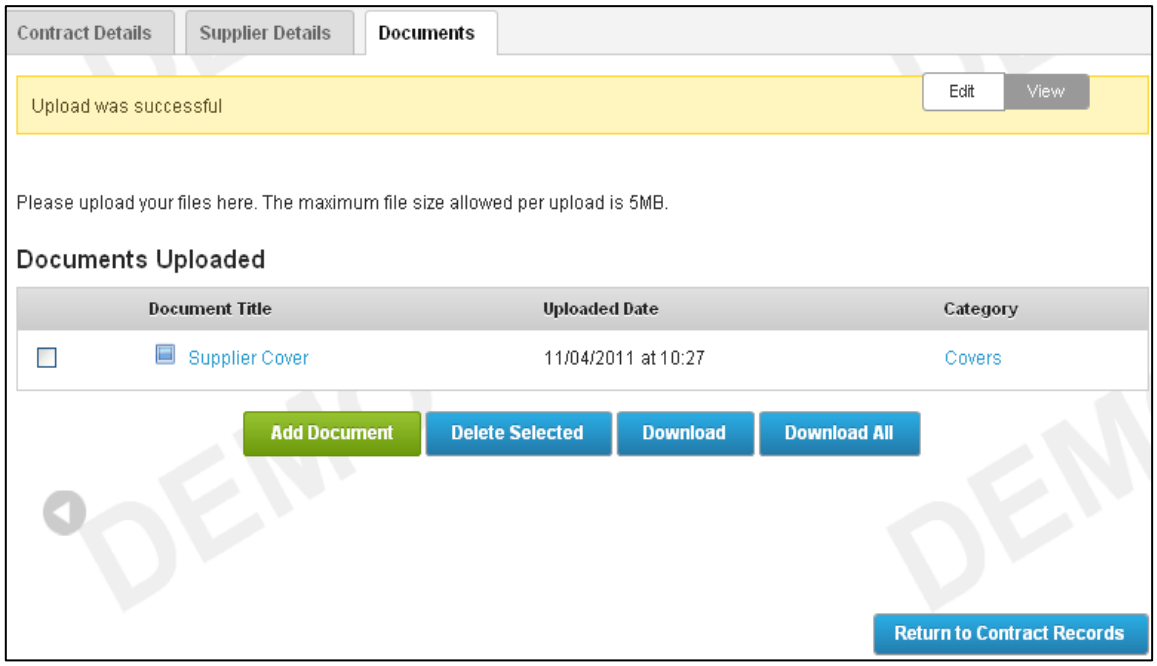


You can add any document which is relevant to the contract award within this section.



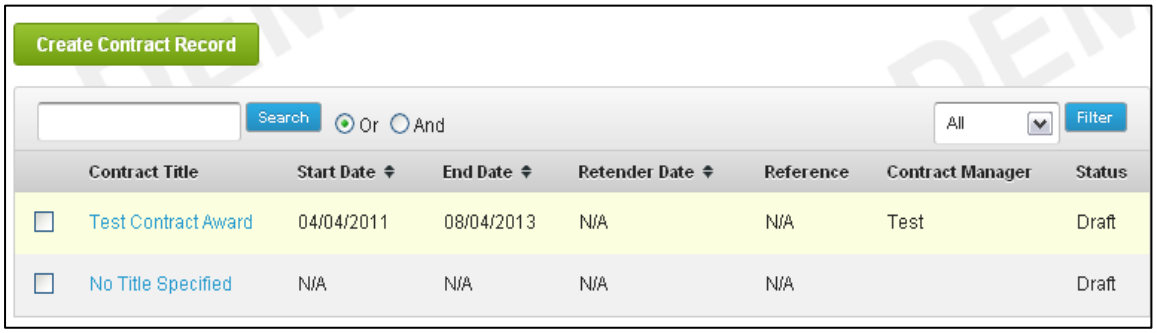
When browsing for a document, you can also give the document a title and a category. This will allow for easier monitoring of your documentation.

To add more documents, click ‘Add Another Document’. You can also delete and download documents from this area.

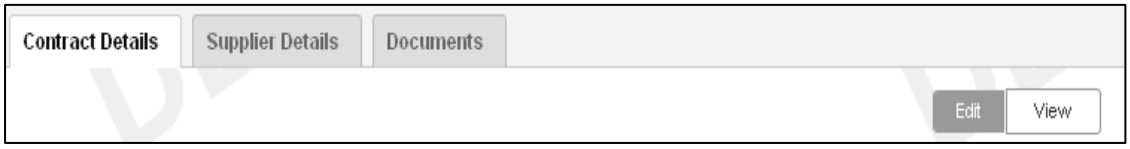


Editing existing Contract Records

To edit an existing Contract Record, click on the Contract Title.



This will take you in to the Record and you must ensure that you click ‘Edit’ before making a change, as the system will default to View mode.

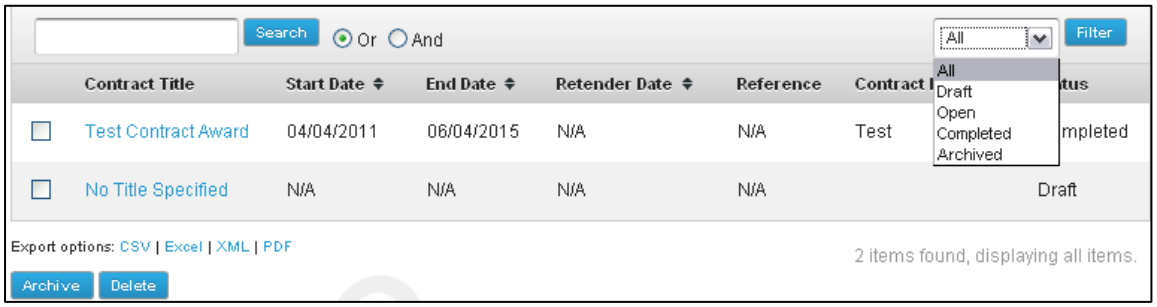


Any changes made should be saved. You can do this by clicking ‘Save and Continue’ or ‘Save’, depending which section you are editing.

Filtering Contract Records

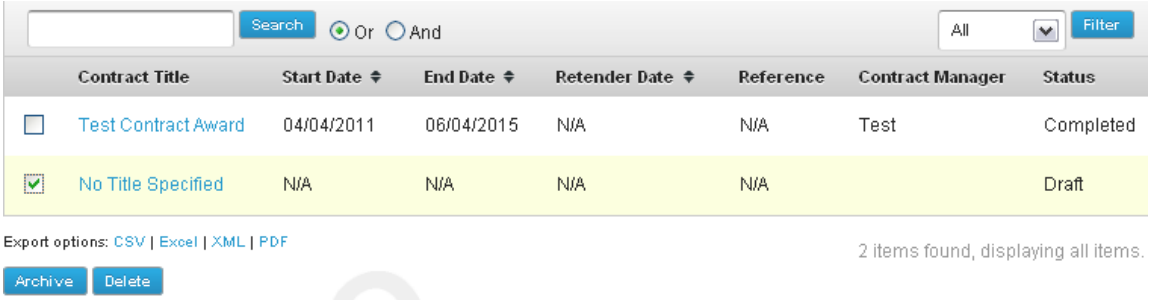
You can display your Contract Records in various ways. On the main page there is a filter drop down that you can select All; Draft; Open; Completed and Archived.

Choose one of the drop-down options and click 'Filter' to display your selection.



Deleting Contract Records

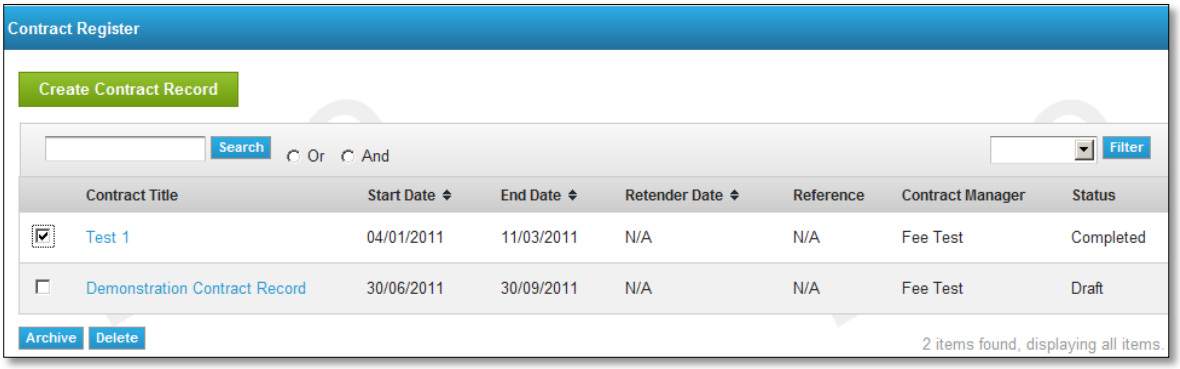
On the main page where your Contract Records are displayed, there is a tick box. In order to delete a Record, you must tick this box and click 'Delete'. Please note that you can only delete a Draft Record.



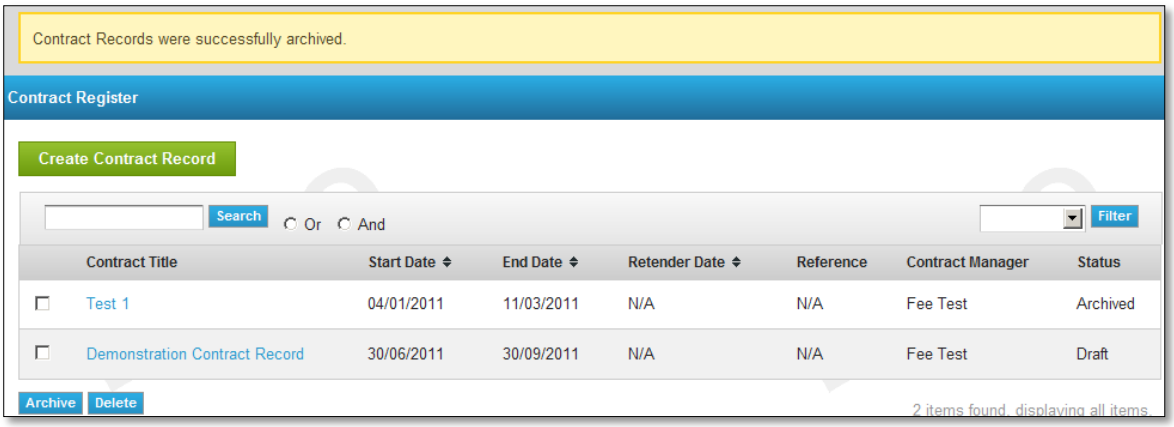
Archiving Contract Records

From within the Contract register page you will have a list of any Contract records you have created. At the bottom of the box containing the contract records there is an 'Archive' button.

At the left hand side of each contract record title there is a checkbox. Click the checkbox at the side of the record you want to archive and a tick will appear.



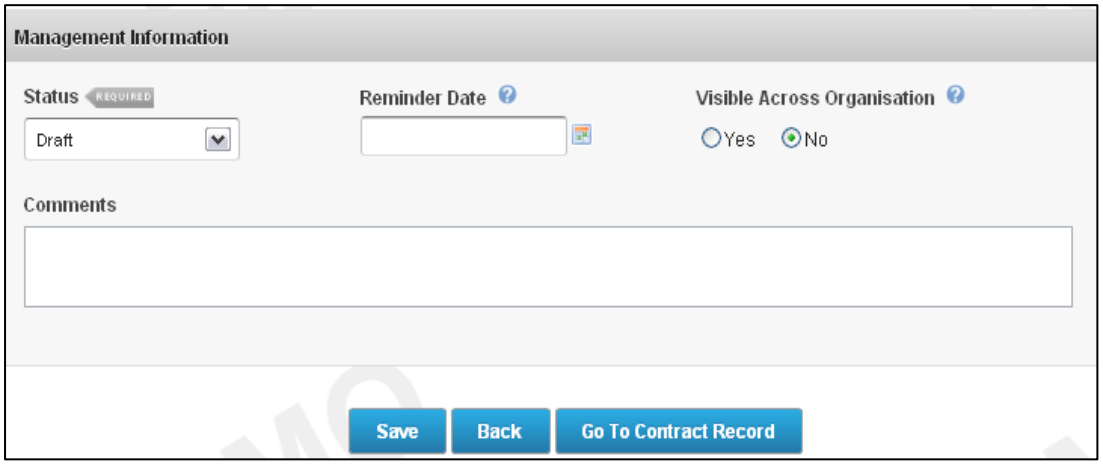
Click 'Archive' and your chosen contract status will change to 'Archived'. You can only archive records which are 'completed' status.



Management Information

Management Information allows you to change the status, reminder date and visibility of your Contract Record. This is accessible from the top section of each page. In order to change any of the information, you must be in the 'Edit' mode of the Contract Record.

When you click 'Management Information' you will be directed to the following screen which will allow you to action the following three sections.



Changing status of Contract Records

Choose from the drop down menu below 'Status' to change. Status can be Draft, Open, Completed and Archived.

Visible Across Organisation

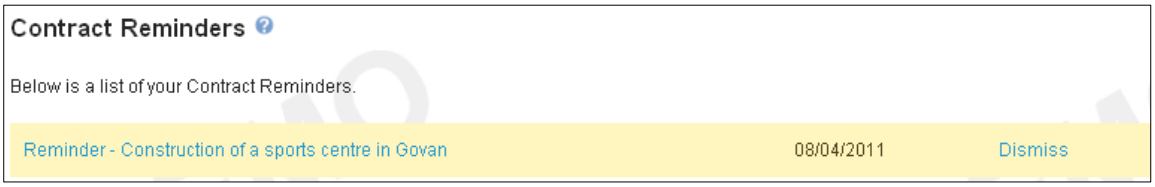
To make this Contract Record visible to all users in your organisation, select 'Yes'. This means that everyone within your organisation regardless of hierarchy will be able to view this record. Selecting 'No' will only display this Contract Record to those within your immediate group and your superiors.

Managing your reminders

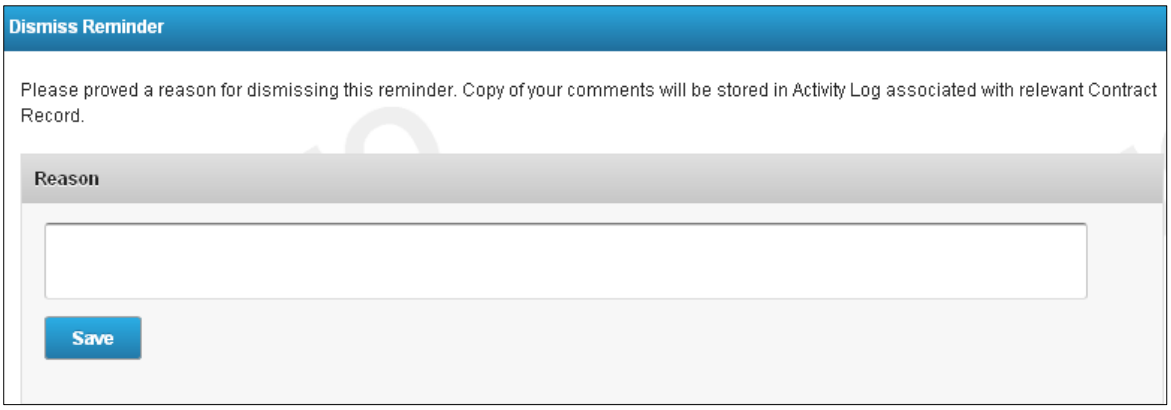
Setting a reminder date will prompt the system to email you and the assigned contract owner on the selected day in order for you to begin retendering. If you reset your reminder date within Management Information, you are rescheduling it to another date convenient to your schedule. If there is no action taken, your reminder will persist.

Any reminders appropriate to your account level will be displayed on the main page. To remove the reminder, click 'Dismiss'. To be reminded at a later date, click 'Title' to set another date.

If you select 'Title' you will be taken directly into the Contract Record and you can then make any necessary changes and/or reschedule the reminder for a future date.



By clicking 'Dismiss', you will be asked to enter a reason why you have chosen not to take further action.



Training

Our highly trained Delta eSourcing Account Managers are available to provide you with telephone tutorials to assist you through the process should you require further assistance.

You can contact us on the details below to arrange a telephone tutorial at a convenient time to suit you:

Email: helpdesk@delta-esourcing.com or *Tel:* 0845 270 7050

If you are looking for a bespoke training session, you can contact our Public Sector Sales Team on the details below:

Email: psst@delta-esourcing.com or *Tel:* 0845 270 7090