City of Madison

Contract Routing System

Contract Routing - Version 2.3.2
Developed by City of Madison, Information Services Department,
Application Development Section
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Contract Routing System

Purpose: To provide a place to keep track of the status of contracts that are routed through various city agencies. This does not replace the actual paper documents that are being routed, nor does it provide for electronic sign-off on contracts.

General Guidelines:

- The originating agency (the agency the contract is primarily with) is responsible to enter the contract information into the system, produce the routing sheet cover (which is then attached to the top of the documents), and begin the physical routing. This is accomplished on the screen called "Enter & Maintain Contracts".
- When an agency receives a contract to be signed, the intake person would log into the system and go to a screen called "Check for My Contracts". The intake person will select the contract being worked on, and indicate that it was received, and the date it was received.
- When a contract is signed-off by that agency, the responsible individual will then indicate that it was signed, and the date it was signed.
- Once a contract is indicated as having been signed by an agency, the contract will show up automatically for the next agency on the routing list when they go to "Check for My Contracts".
- When the routing is complete, the contract is returned to the Clerk's office where they will indicate that it is complete when they receive the physical routing back.
- Once a contract has been entered into the system it cannot be changed or deleted except by appropriate City Clerk's staff.
- The system has the ability to add users and designate them as "read only". This means they would only be able to view the status of contracts, but would not be able to indicate the received or signed-off status. They would not be able to add new contracts to the system either.
- Notes can be added to each contract by anyone authorized to do so. The notes will be marked with the date, time, and userid of who added the note. By default any notes added while entering the contract information into the system will print on the routing sheet cover. This option can be turned off by right-clicking on the "Add Notes" button in the "Enter & Maintain Contracts" screen.

General Terms and Functionality

Throughout the system, you will find a general theme to how screens are presented and operate. Screen layout and design are optimized to operate at a minimum desktop setting resolution of 800 x 600 with small fonts. Going to a lower resolution or to larger fonts will cause some display problems. This is an industry standard minimum setting.

In general, most major screens are presented as a separate window. When minimized, it will be a separate item in your taskbar. Windows will have the following characteristics in common:

- They will have a title which also shows who is currently logged in to the application.
- They will have a menu bar just below the title.
- They will have a toolbar just below the menu bar.
- The toolbar may have the following buttons (*this will vary depending on the needs of the window*):

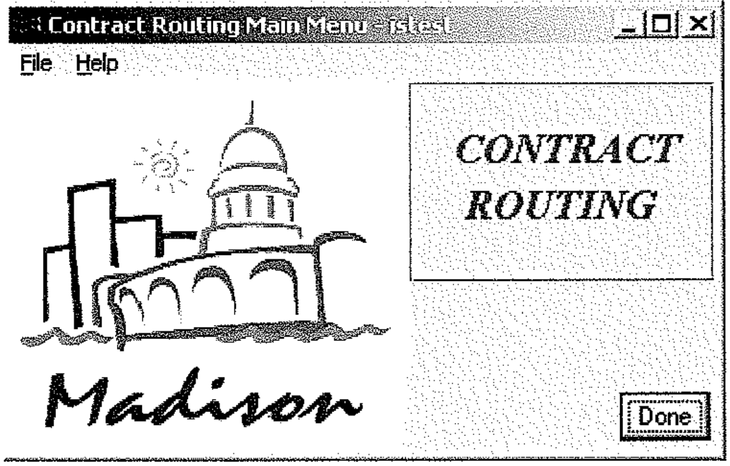
Add	choose this button to add a new record.
Update	choose this button to modify a record.
Copy	choose this button to create a new record and copy all the values from the current record into the new record.
Delete	choose this button to delete a record.
Save	choose this button when you are finished with an "Add", "Update", or "Copy" function to save the record.
Reset	choose this button to undo changes made to fields and reset their values to what they were before you began modifications.
Cancel	choose this button to cancel an "Add", "Update", or "Copy" function.
First	go to the first record in the browser.
Next	go to the next record in the browser.
Previous	go to the previous record in the browser.
Last	go to the last record in the browser.
Filter	choosing this will invoke the filter dialog-box which will allow you to set certain criteria to display only those records that match that criteria.

- Following the toolbar, they will have a "Browser". This is a scrollable grid that will display a limited amount of information about each record. You can navigate through the browser. The current record selected will be highlighted.
- Following the browser the window layout will begin to vary more. There may be data viewers that are used to display information about the selected record in the browser. The data viewer is also used to allow input into the fields of information.
- There may also be "child" browsers that are linked to the "parent" browser.
- There may be buttons in various locations throughout the window whose label should give some indication of their purpose.

To begin the application:

Double-click on the icon titled "Contract Routing". You will be presented with a login dialog-box that will prompt you for your userid and password. Choose "OK".

Upon successful login, you will get the following main window that has your main menu.



Select "File" from the menu bar and you are presented with the following choices:

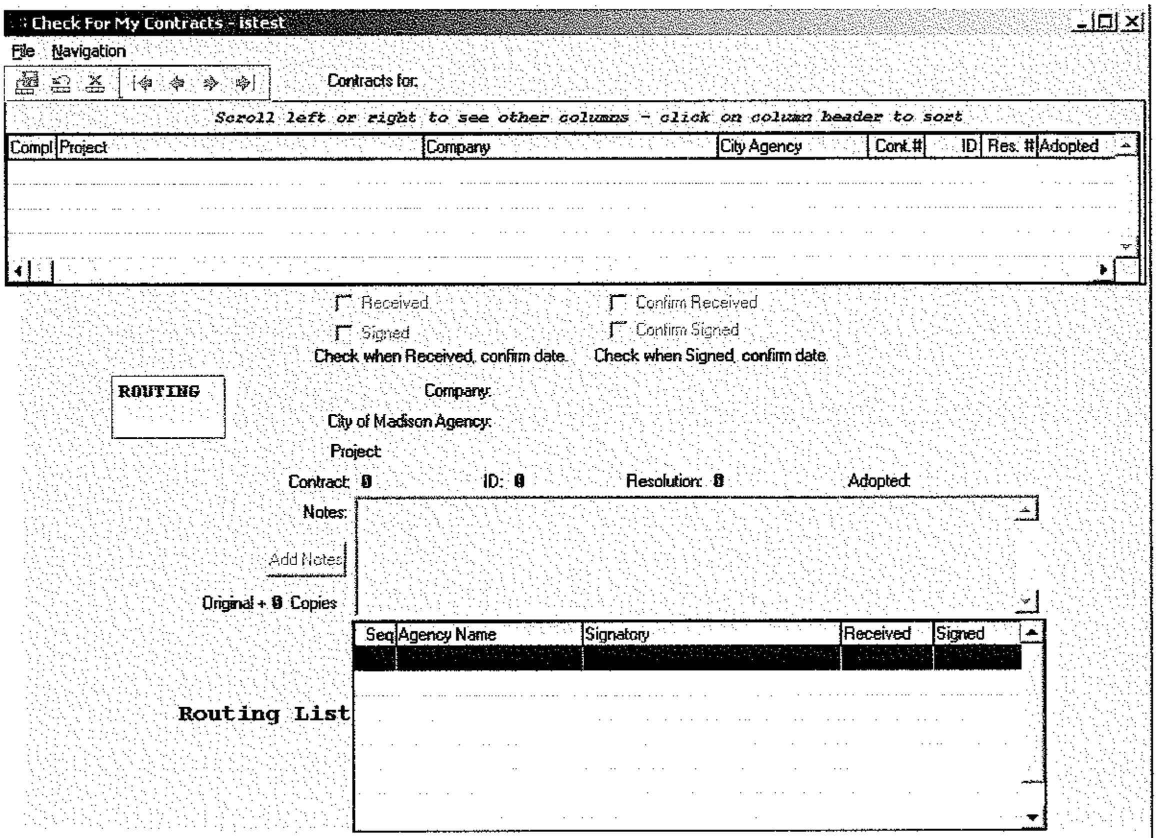
- Check for My Contracts
- View Status of All Contracts
- Enter & Maintain Contracts
- Maintain Agencies List
- Maintain Routing Types
- Exit

Select "Help" from the menu bar and you are presented with the following choices:

- About
- Change my Password
- Login Again

To check for and update the status of contracts your agency needs to take action on:

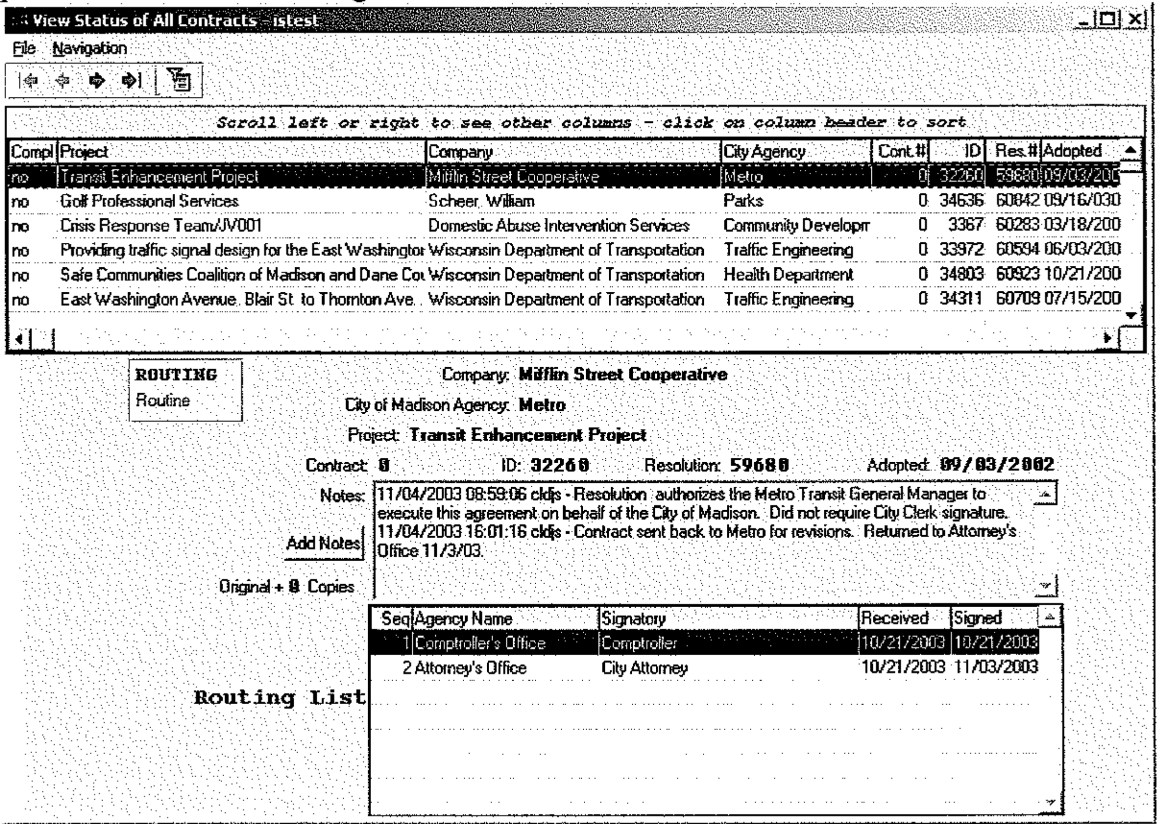
1. From the main menu, choose "Check for My Contracts" and you will get the window shown below.



2. If there are no contracts for you to take action on, you will be presented with a message stating that. Choose "OK" on the message, and then close this window.
3. If there are one or more contracts needing your attention, select the contract you wish to update the status of in the top browser.
4. When the contract is received, check the "Received" box. This will then pre-fill the date you received this with today's date. You can then enter a different date if you wish. When you are satisfied with the date, check the "Confirm Received" box. This will update the status of that contract as having been received by you.
5. After you have reviewed the contract and signed off on the cover sheet, check the "Signed" box. This will then pre-fill the date you signed off with today's date. You can then enter a different date if you wish. When you are satisfied with the date, check the "Confirm Signed" box. This will update the status of that contract as having been signed off by you, and will present it to the next agency in the routing list. Then, physically route the contract by the indicated routing method to the next agency on the list. If you are the last agency, send it back to the Clerk's office.
6. If you wish to enter some notes, choose the "Add Notes" button. You will be presented with a dialog-box enabling you to add notes to the contract.

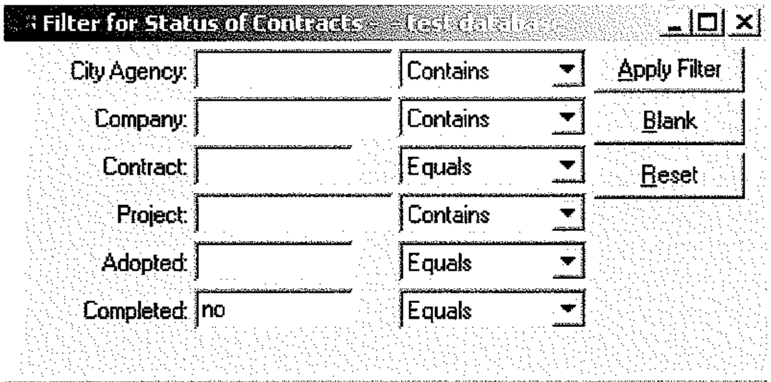
To view the status of all contracts:

Choose "View Status of All Contracts" from the menu on the main window. You will be presented with the following window:



In the main browser, you can scroll left or right to see other columns of data. You can click on a column header to sort the data by that column.

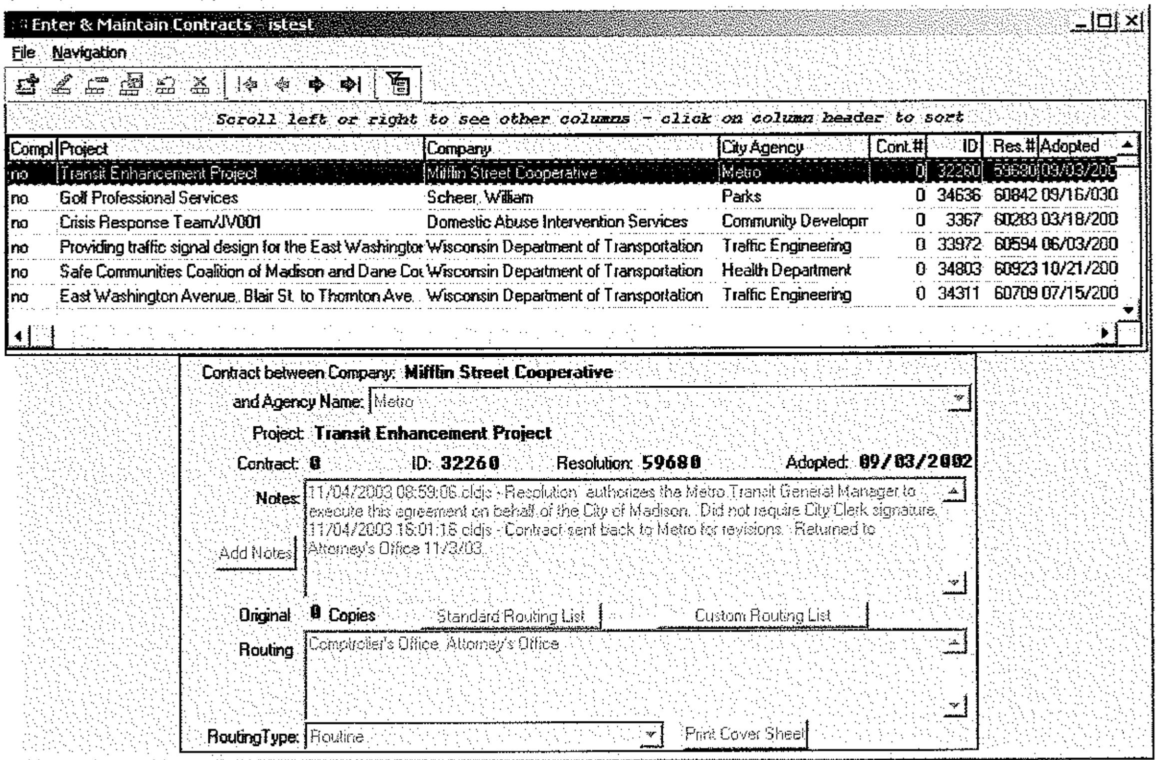
You can also choose the "Filter" button, which will present the following dialog-box:



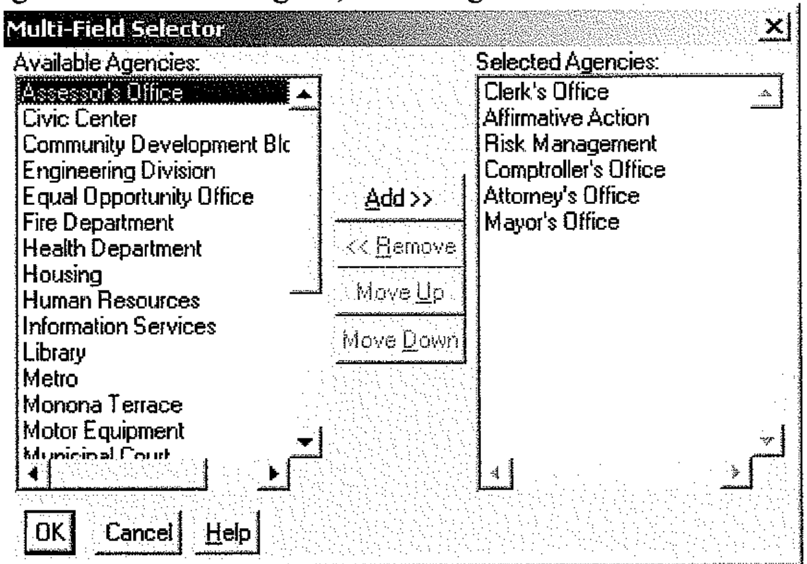
Enter the values you wish to search for and then choose "Apply Filter". This will cause your browser to display only those records that match your criteria. Note that the Filter defaults to having a "no" in the "Completed:" field. This means that you will initially see only the contracts which have not completed their routing. To re-display all the records, choose "Blank", then choose "Apply Filter".

To enter a new contract, set up the routing, and produce the cover sheet:

1. Choose "Enter & Maintain Contracts" from the menu of the main window.



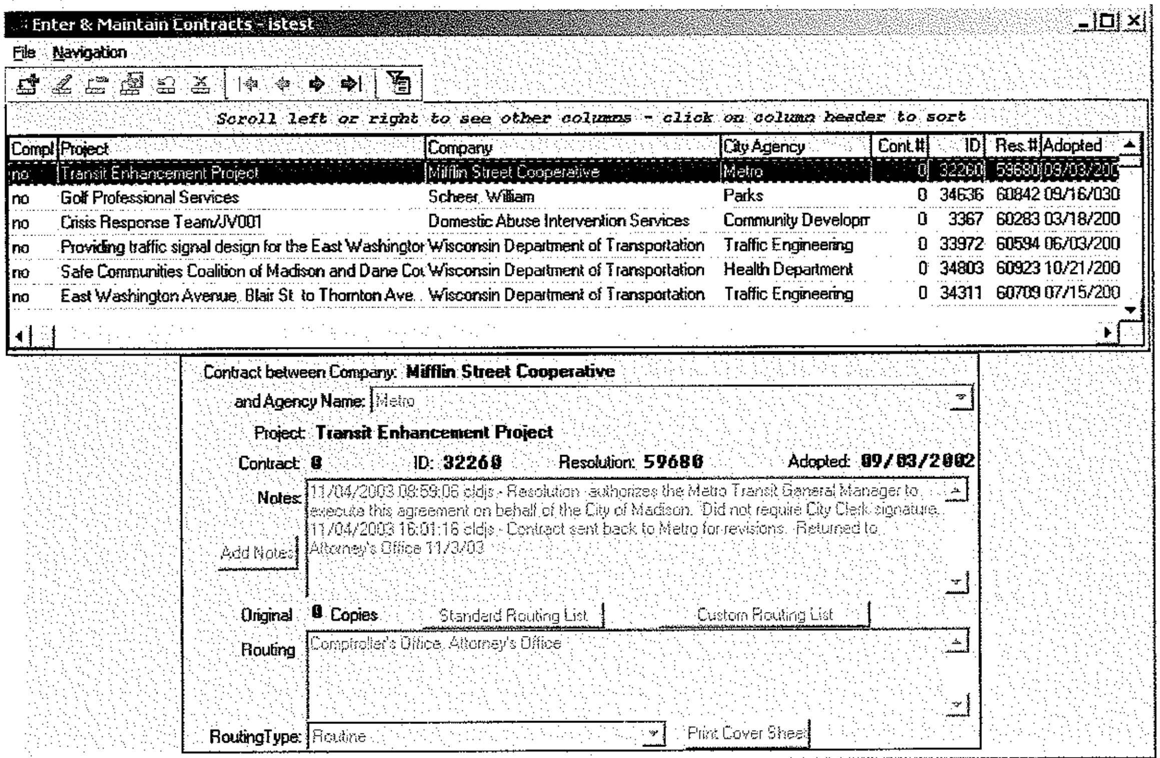
2. Choose the "Add" button on the toolbar.
3. Enter in your information.
4. A new contract will have standard routing set up by default.
5. If this contract requires a different routing, choose the "Custom Routing List" button. You will be presented with the following dialog-box which you can use to add or remove agencies to the routing list, and change the order that the routing needs to take place.



6. When you are finished entering in your contract information, choose the "Save" button on the toolbar near the top of the window. This will automatically start the printing of a cover sheet. You will be shown the standard Windows printer requester, where you can select a printer and also chose to print multiple copies of the cover sheet if you wish.

<u>For Clerk's only – to mark a contract as "completed" when the routing is finished:</u>

1. Choose "Enter & Maintain Contracts" from the menu of the main window.



2. Choose the "Update" button on the toolbar.
3. Choose the button labeled "Completed". This button only displays for Clerk's office users.
4. Choose the "Save" button on the toolbar near the top of the window.

Also, for Clerk's users only, a button will be displayed labeled "Make Corrections". This is on the "Check for My Contracts" window and the "View Status of All Contracts". Choosing this button will take you to a dialog-box very similar to the window shown above and will allow you to make changes to the contract.