RFA AND LNTP APROVAL

The **Recommendation for Award (RFA)** and the **Limited Notice to Proceed (LNTP)** approval processes are both managed in the Contracts form. The Procurement Team will create the form, enter the applicable data in one or both process sections and then start the corresponding workflow(s).

The **workflow** follows the same steps for each of the approval processes. The first step sends the record to the **Project Manager (PM)** for approval. When the PM passes the workflow, the **SAP Administrator** is notified with instructions to submit to SAP. If approved, the SAP Administrator will pass the workflow which notifies the **Procurement Team**.

RFA Approval Workflow Diagram:

LNTP Approval Workflow Diagram:

To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

CREATE THE CONTRACT

1) The Procurement Team will create a new Contract record and enter the Details at the top of the page and then complete the data fields for the applicable process(s).
   a. Clicking **New** from the Contracts log view will open the Create Contract modal with the required fields.

i. Enter the **Contract #** and **Subject.**
ii. Select **Subcontract** in the **Type** field.
iii. Check **Unit Price Contract** if you want the Schedule of Values to include Qty, and Unit Cost fields.
iv. Click **Save** to open the full list of available fields.

b. Enter any additional information in the fields at the top of the page.
c. Complete the fields in the applicable process section.
    i. **Purchase Request (PR) Reference**:
        1. Click **Add Existing**.
        2. Select the PR and Save.
    ii. Schedule of Values:
        1. Click **Create New**.
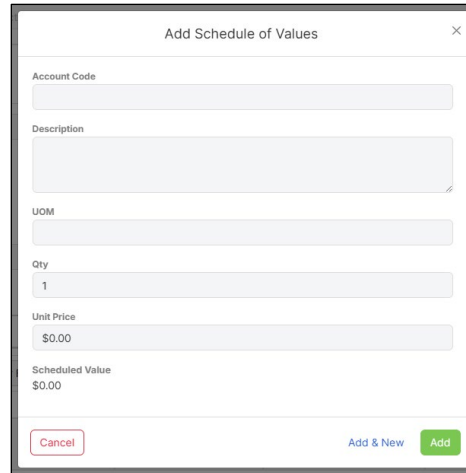
2. Select the **Account Code**.

3. Enter a **Description**.

4. If you selected Unit Price Contract when creating the record, you will enter the **UOM** (Unit of Measure), **Qty**, and **Unit Price** fields to calculate the **Scheduled Value** amount.

5. Click **Add** to add the data entered as a row in the Schedule of Values (SOV) or click **Add & New** to create another row for the SOV.

d. Complete the fields for the applicable process:
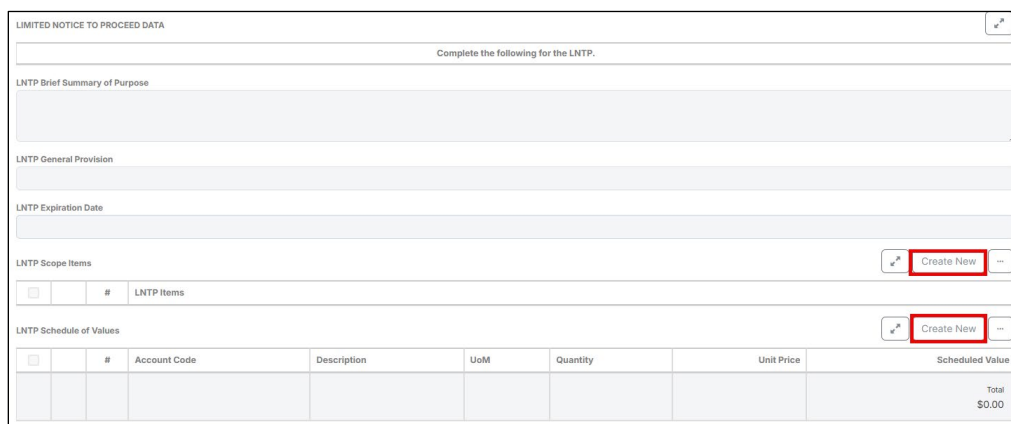
a. **RFA**

b. **LNTP**

RECOMMENDATION FOR AWARD DATA

1a) To start the approval process for a **Recommendation for Award (RFA)** the fields in the Recommendation for Award Data section will need to be filled in and the workflow started.

a. Enter the **RFA** Data.

b. **Save.**

c. Start the **RFA/RFV Approval** workflow. *See **Start the Workflow** in this QRG for help.*

d. Upload any applicable documents to the **Attachments** section of the record. *See **Adding Attachments to Forms** for help with Attachments.*

LIMITED NOTICE TO PROCEED DATA

1b) To start the approval process for a **Limited Notice to Proceed (LNTP)** the fields in the Limited Notice to Proceed Data section will need to be filled in and the workflow started.


a. Enter the LNTP Data
   i. Click **Create New** at the top of the **Scope Items** collection.
      1. Enter the **Item** description.
      2. Click **Add** to add the data entered in the Add LNTP Scope Items modal as a row in the **LNTP Scope Items** or click **Add & New** to create another row for the Items list.
   ii. Click **Create New** at the top of the **LNTP Schedule of Values** collection.
      1. Select the **Account Code**.
      2. Enter a **Description** of the SOV item
      3. Enter the **UOM, Quantity**, and **Unit Price**.
      4. Click **Add** to add the data entered in the Add LNTP Schedule of Values modal as a row in the **LNTP Schedule of Values** or click **Add & New** to create another row for the Items list.

b. **Save.**

c. Start the **LNTP Approval** workflow. *See **Start the Workflow** in this QRG for help.*

d. Upload any applicable documents to the **Attachments** section of the record. *See **Adding Attachments to Forms** for help with Attachments.*
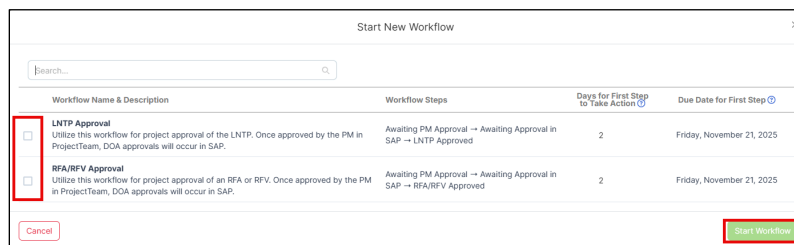
START THE WORKFLOW

2) After entering data in the Details of the new Contracts record the default Save button will be **Save & Start Workflow**. This will open the list of available workflows that the user has access to start.

OR After a record is saved, a user can navigate to the Workflows panel of the open record and click **Start New** to open the list of workflows.
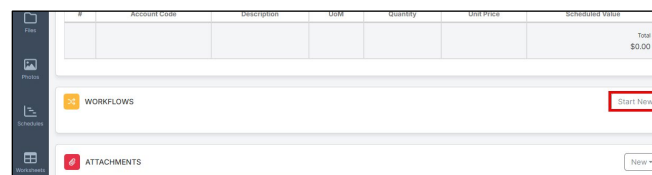

a. Check the box beside the applicable workflow.
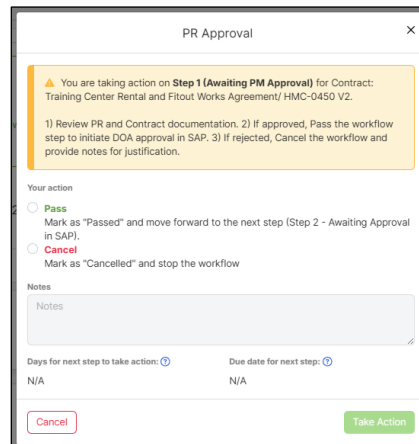b. **Start Workflow** to send the first workflow step to the PM for review and approval.

APPROVE FOR SAP SUBMITTAL

3) When the workflow is started for either approval process, the **Project Manager** will receive an email with the assigned first step.
a. **Review** the applicable the record and any attachments.
b. Click **Take Action** from the top of the page or from the Workflow panel.
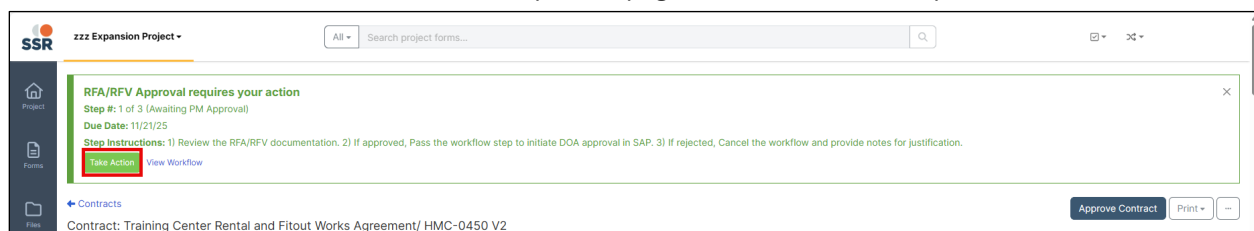
c. If Approved, **Pass** the workflow step to initiate DOA approval in SAP.
i. **Pass** moves the workflow to the SAP Administrator with instructions to Run the Merge Temple and submit in SAP. *See **Run the Merge Template** in this QRG.*

d. If Rejected, **Cancel** the workflow and provide notes for justification.

    i. **Cancel** notifies the workflow initiator and marks the workflow Cancelled.

    ii. The Procurement Team can **Restart** the workflow at any time.
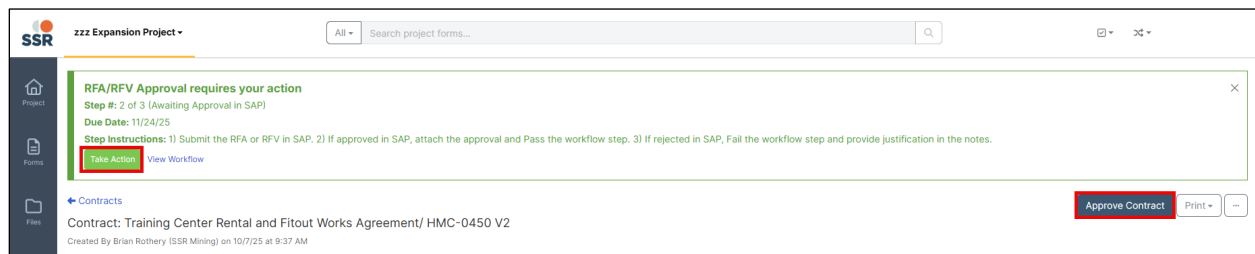
SUBMIT TO SAP

4) When the Project Manager approves the RFA or the LNTP and passes their workflow step, the workflow moves to the **SAP Administrator** with instructions to submit to SAP.

    a. **Submit** the data to SAP.

    b. If **Approved** in SAP:

        i.   Open the record and click **Approve Contract** from the top of the page.

        ii. Upload the approval to the **Attachments** panel of the Contract record. *See **Adding Attachments to Forms** in the help pages for more help.*

        iii. Click **Take Action** from the top of the page or from the Workflow panel.

        iv. Enter any applicable **Notes.**

        v.   **Pass** the workflow step.

             1. **Pass** returns the workflow to the Procurement Team.

    c. If **Rejected in SAP**:

        i.   Click **Take Action** from the top of the page or from the Workflow panel.

        ii. Provide justification in the **Notes.**

        iii. **Fail** the workflow step.

             1. **Fail** returns the workflow to the PM.

PROCEEDING WITH AN APPROVED RFA OR LNTP

5) When the SAP Approves the RFA or LNTP and the SAP Administrator passes the workflow step, the workflow will be returned to the **Procurement Team** with instructions for proceeding.

   a. **Request for Approval**
      i. Share the record with the vendor and provide notification to proceed per the RFA.
      ii. Click **Take Action** from the top of the page or from the Workflow panel.
      iii. **Pass** the workflow step to complete the workflow.

   b. **Limited Notice to Proceed**
      i. Share the record with the vendor and provide notification to proceed per the LNTP.
      ii. Click **Take Action** from the top of the page or from the Workflow panel.
      iii. **Pass** the workflow step to complete the workflow.

RESOURCES

Help Pages:

Start a workflow on a document

Print a Merge Template

Adding Attachments to Forms

Additional Resources:

Basic Navigation

Batch Import

Sharing Records

Adding Attachments