CONTRACTS – RECOMMENDATION FOR AWARD (RFA)

The **Recommendation for Award (RFA)** approval processes is managed in the Contracts form. The Procurement Team will create the form, enter the applicable data in one or more of the process sections and then start the corresponding workflow(s).

The first step of the workflow sends the record to the **Project Manager (PM)** for approval. When the PM passes the workflow, the **SAP Admistrator** is notified with instructions to run the applicable Merge Template to submit to SAP. If approved, the SAP Administrator will pass the workflow which notifies the **Procurement Team**.
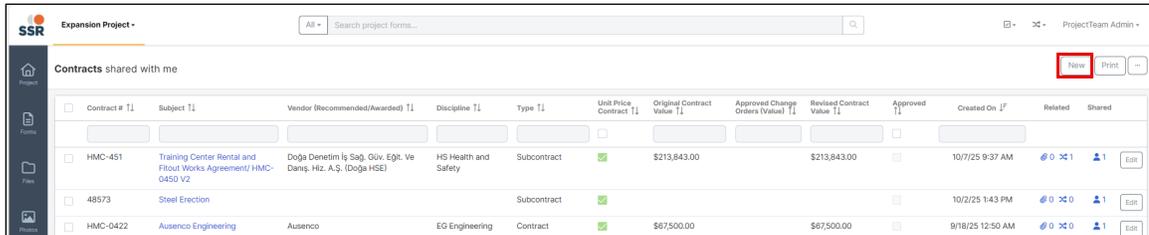
RFA/RFV Approval Workflow Diagram:

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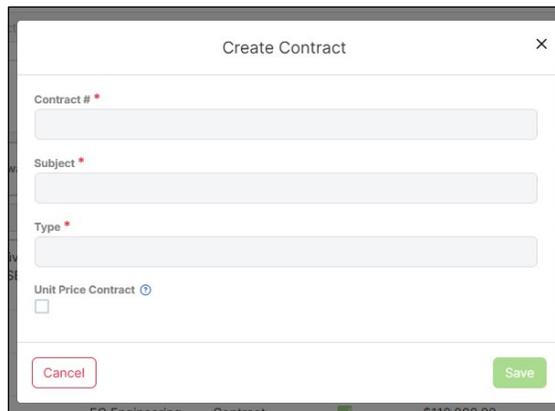
CREATE THE CONTRACT

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 all the required fields.

        i. Enter the **Contract #.**

        ii. Enter the **Subject.**

        iii. Select **Subcontract** in the **Type** field.

        iv. Check **Unit Price Contract** if you want the Schedule of Values to include Qty, and Unit Cost fields.

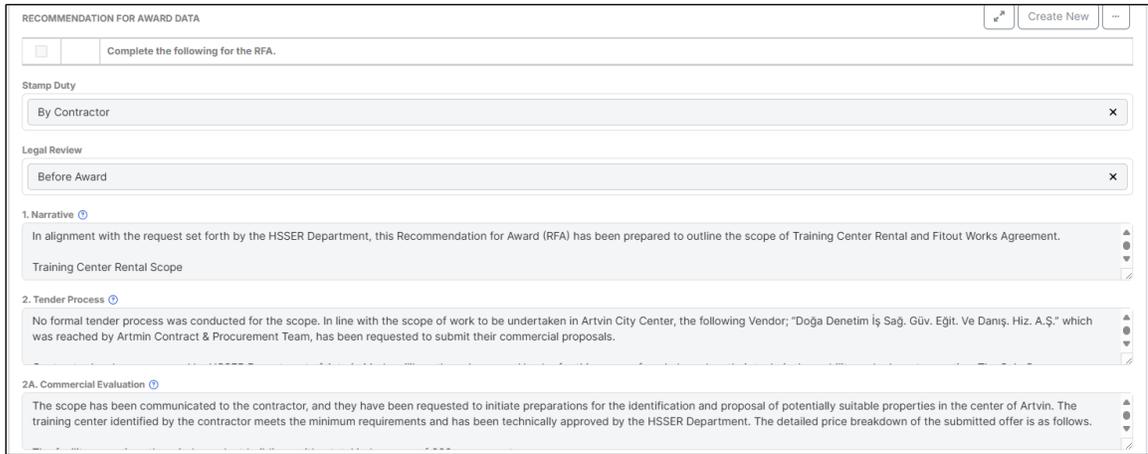   v. Click **Save** to open the full list of available fields.

    b. Enter any additional information in the fields at the top of the page.

    c. Select the **Stamp Duty** responsible party and the timing of the **Legal Review**.

    a. Enter the details of the recommendation in fields **1-5**.

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. Click **Save & Start Workflow** in a new record or **Start New** in the Workflows panel of an existing record.

b. Check the box beside the applicable workflow.
c. Click **Start Workflow** to send the first workflow step to the PM for review and approval. *See* **Approve for SAP Submittal** *in this QRG.*
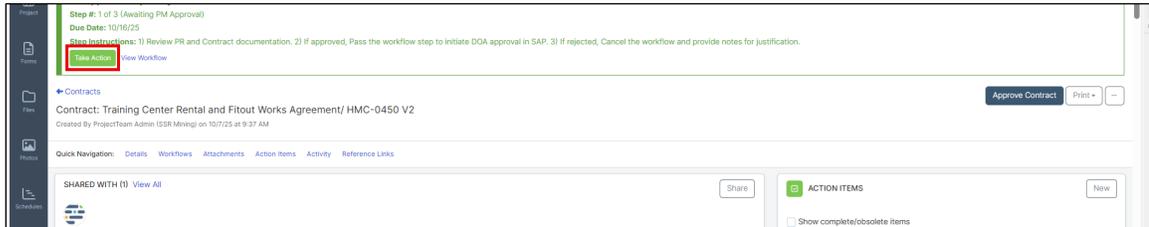
1) When the workflow is started for any of the three approval processes, the **Project Manager** will be assigned the first step.
   a. **Review** the applicable section of the record.
   b. Click **Take Action** from the top of the page or from the Workflow panel.

   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.
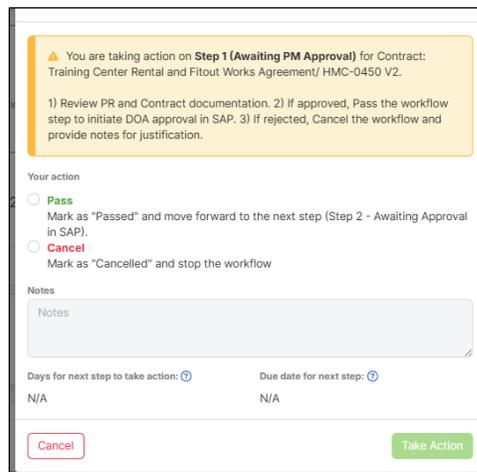
RUN THE MERGE TEMPLATE TO SUBMIT TO SAP

2) When the Project Manager approvestue RFA and passes their workflow step, the workflow moves to the **SAP Administrator** with instructions to run the merge template to submit to SAP. The **Bidders List** is also available as a merge template.
   a. Run the **Merge Template**.
      i. From the open Contract record, click **Print**.
      ii. Select **Merge to Template**.
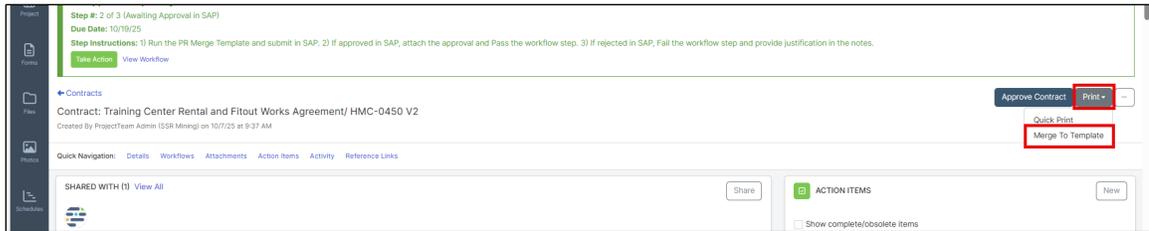
iii. **Select** and **Run** the Merge Template for the applicable approval process.

iv. **Save** and **Download** the document. *Saved Merge Templates are accessible in the Merge Documents Form.*

b. **Submit** the downloaded document to SAP.

c. 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.

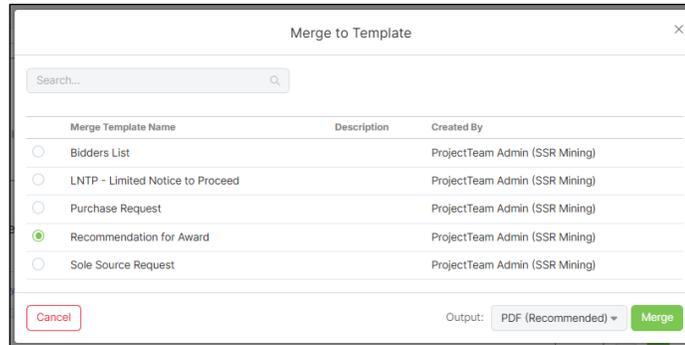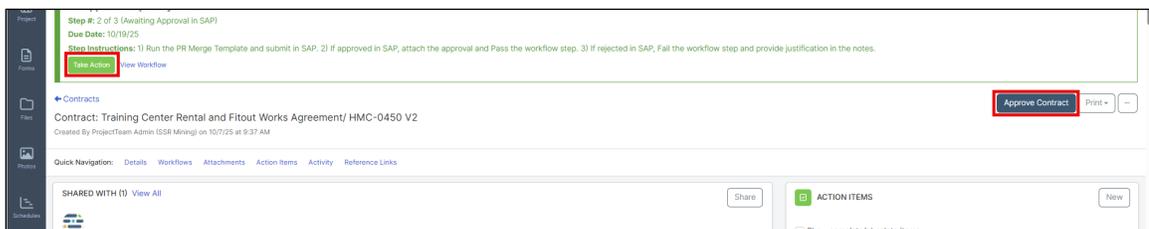   iv. Enter any applicable **Notes.**

    v. **Pass** the workflow step.

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

d. 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

3) When the RFA is approved in SAP and the SAP Administrator passes the workflow step, the workflow will be returned to the **Procurement Team** with instructions for proceeding.

    a. **Procurement Request**

        i. Proceed with procurement activities per the approved PR.

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

        iii. **Pass** the workflow step to acknowledge receipt.

    b. **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.

    c. **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