

**SOLICITATION 5082**  
**CONTRACT MANAGEMENT**  
**Attachment A**  
**System Requirements**

1. The system selected will support the management of a contract project for the entire contract lifecycle from the initial solicitation through vendor evaluation and scoring, contract creation and negotiation/redlines, contract execution, and closure. The system will support the following features to that end:
  - A. The system should provide the capability to create a Contract Project for every Procurement project that the agency partakes in. The ideal System would have the capability to record the following activities for all Contract Projects:
    - i. Project Number
    - ii. Project Name
    - iii. Project Manager
    - iv. Contract Administrator
    - v. Estimated Total Cost
    - vi. Budget Coding
    - vii. Estimated Solicitation Date
    - viii. Estimated Work Start Date
    - ix. Evaluation Plan (SHA employee information)
    - x. Current Status - The Status field will be updated by the system as the project progresses through the process. The Status Codes include:
      1. Assigned
      2. Draft
      3. Solicitation
      4. Evaluation
      5. Negotiation
      6. Executed
      7. Active
      8. In Closing
      9. Closed
  - B. The System should provide the capability to manage contract documents, including Requests for Proposals, Proposals received, Evaluation Scores, Contracts, and supporting documentation as follows:
    - i. These documents will be tagged with appropriate metadata or otherwise organized by document type and contract.
    - ii. The System should support routing documents for editing and approvals, tracking changes and approvals in a reportable manner.
    - iii. The System should provide version control of all documents.
    - iv. If the System does not provide this document management capability, it must integrate or interface with Microsoft SharePoint.
  - C. The System should provide a mechanism for capturing the Vendor Evaluation Scores from the evaluation team.
  - D. The System should provide the capability to submit Change Requests for an executed Contract.

- i. The Change Request will follow an approval workflow, utilizing the same approvers as the original contract.
    - ii. The System should update the Contract budget information with the new amount, if applicable.
  - E. The System should provide the capability to submit Work Orders for an executed Contract. The Work Order will follow an approval workflow. The System should update the Contract budget information with the new total Contract amount.
2. The System selected should support the management of vendor information for all vendors that the agency works with on contract projects. This information will include the following attributes:
  - A. Vendor name, address, and contact information.
  - B. Vendor Tax ID
  - C. Vendor WMBE, Section 3 and Small Business designations.
  - D. Sub-contractor use, and WMBE, Section 3 and Small Business designation of those sub-contractors.
  - E. Contracts of proposals that the Vendor is associated with.
  - F. Vendor Performance Info.
  - G. Subcontractor vendor information
3. The System Selected should support periodic data uploads from the agency Enterprise Resource Planning (ERP), JD Edwards Enterprise One (E1) as follows:
  - A. For all active contracts, regularly upload the current budget information from E1, including the original budget amount, current budget amount, history of Change Requests and Work Orders, as well as any invoices that have been paid against the Contract.
  - B. For Vendors, regularly upload the current vendor list from the E1 Address Book. The System will not overwrite any Vendor information in the Contract Management System, it will only add new Vendors.
4. The System Selected should provide reporting capability up to 20 fields including but not limited to the following pre-configured reports:
  - A. Contract financial summary
  - B. Contract financial history
  - C. List of all contracts and their status (see item 1 A x)
  - D. Contract summary (abstract)
  - E. Open workflow items by user and by department
  - F. Organizational dashboard (all contracts and their status by department)
  - G. Vendor dashboard (vendors and the contracts that they are involved with)
  - H. Contract Administrator workload
  - I. Workload Forecasting Reports
  - J. Insurance Coverage types and expiration
  - K. Bond types and approval dates ( Bid bond, payment & performance bond, retainage bond)
5. Deployment: The selected Service Provider shall be asked to perform the following tasks in support of the purchase and deployment of the Contract Management System:
  - A. Implementation Planning
    - i. Work with the SHA Project Manager to create a detailed project plan for configuring and implementing the solution.

- ii. Hold a formal Project Kickoff meeting with key stakeholders to review the project plan for implementation.
- B. System Configuration / Customization:
- i. Define and document detailed requirements necessary to configure the system.
  - ii. Configure and/or customize the solution to meet those requirements, including the creation of 3/5 custom reports.
- C. Historical Data Migration:
- i. Upload historical data and documents for active contracts. (approximately 300)
  - ii. Migration of records from an Access database of Contract information is required.
  - iii. The Contract types (views) required are Request for Proposals, Request for Information, Scope of Work, Terms and Conditions, Change Orders, Work Orders, Vendor Fact Sheets, Supporting documents and Addenda.
  - iv. Templates required are Request for Proposals, Request for Information, Scope of Work, Terms and Conditions, Change Orders, Work Orders and Vendor Fact Sheets.
  - v. The number of annual Contracts is up to 200. Each Contract record could have multiple documents related (i.e., Change Orders, Work Orders, etc.). Total number is unknown, but likely not more than 5,000.
- D. Administrator Training:
- i. Provide onsite or online administrator and super user training for up to five (5) SHA Users.
  - ii. Provide training materials so that SHA trainers can train the remaining end users on the system.
- E. Deployment Planning and Support:
- i. Create a detailed implementation Plan for cutover and go-live.
  - ii. Manage the actual cutover to the new system, including directing SHA resources as needed.
  - iii. Initial support of the application for 30 days after go-live.
6. Number of users by role and department expected to need access to the system are 11 in Purchasing, 10 or more in customer departments, and up to 30 concurrent users. This includes 1 Contract Manager, 7 Contract Administrators, 2 system administrative users, 20-30 Project Managers, 100 reviewers / approvers.
7. The Contract types (views) required are Request for Proposals, Request for Information, Scope of Work, Terms and Conditions, Change Orders, Work Orders, Vendor Fact Sheets, Supporting documents and Addenda.
8. Templates required are Request for Proposals, Request for Information, Scope of Work, Terms and Conditions, Change Orders, Work Orders and Vendor Fact Sheets.
9. The desired deployment option is SaaS