THE UNIVERSITY of TEXAS SYSTEM
CCARS
**CONTRACT COLLABORATION &
REPORTING SYSTEM**

U. T. SYSTEM ADMINISTRATION
OFFICE OF CONTRACTS AND PROCUREMENT
(UPDATED 10.26.2022)

JOB AID: SUBMIT A REQUEST FORM

The Contract Collaboration and Reporting System (CCARS) is the UT System Administration on-line contract management system. This job aid will assist Requestors with completing a CCARS Request Form which must be submitted in order to initiate the contracting process.

PREPARATION

Prior to beginning the Request Form, gather all required documents needed to submit request. Required documents vary based on the type of contract requested. See the DCA Checklist to determine which documents are required for the specific contract being requested.

★*TIP: Once required fields are completed, Requestors may "Save" a work-in-progress Request Form and Submit once all required documents have been uploaded.*

ACCESS CCARS

To avoid cache related issues, it is not recommended that users mark the link to CCARS as a favorite. Links for CCARS are located on the following web sites:

- Contract and Procurement Home Page

- UT4U >> Resources Tab >> Current Employee Information Section

Users will be prompted to log in using their UT System SNAC credentials.

HOME PAGE

The Menu Bar located at the top of the home page provides Requestors with the following shortcuts:

My List: List of Request Forms by Status which when clicked will display all Request Forms for the Requestors in a particular status.

Reports: List of Reports available to the Requestors. Reports can be created by the Contracts and Procurement (CnP) Team and shared with users.

Create: Shortcut to begin a new Request Form.

CCARS   HOME   MY LIST   REPORTS   CREATE

Below the Menu Bar is the dashboard with Quick Link Buttons to the New Request, Find Request by Title, and Find Request by Request Number (REQ#). Additional Quick Link Buttons have also been provided to resources such as CnP Forms and Guides and a DCA Checklist. These are additional resources available to assist the Requestors during the contracting process. The dashboard also includes panels where Requestors can access their Request Forms through the various stages of the contracting process.

Panel 1: This panel will list all Active Requests. In the screenshot below, 7 total active requests are displayed; 0 in Working/Draft Status; 5 in Submitted Status; 1 in Solicitation Status; and 1 in Contracting Status.

Panel 2: This panel will list all requests that are Closed and All Requests regardless of status. The screen shot below displays 3 in the Completed Status, 12 All My Requests, and 2 in the Cancelled Status (7 Active Requests, 3 Completed, and 2 Cancelled).

Request Forms can be accessed in two ways:

- Click on the number on the left side of the status to go to a page listing Requests in that particular status. From this page, Requestors can
  - Access the Request Form,
  - Email a list of Requests, or
  - Download the Requests to Excel.
- Click on the down arrow on the right side of the status to display the listing at the bottom of the home page.

REQUEST FORM

Access the request form by one of the methods noted above.

REQUIRED FIELDS

Any field on the Request Form with a red asterisk (*) is required to <u>SAVE</u> the form. However, required documentation must be uploaded in order to <u>SUBMIT</u> the form.

HELP

Some fields display the Help icon. This indicates there are more details to display about the field. Hover over the icon to display the additional information.

SECTIONS

The Request Form is divided into Sections. Sections, by default, appear in expanded form. To collapse or expand a Section, click the icon at the far right of each Section header. To collapse or expand ALL Sections, double click the icon.

SECTION 1: INSTRUCTIONS

This section contains directions to access resources to assist with completing the Request Form.

SECTION 2: PROCUREMENT REQUEST INFORMATION

In this Section, Requestors will provide general information related to the procurement being requested.

Field 1: Procurement Type

Select the appropriate Procurement Type. If Other is selected, an additional <u>required</u> field will display to describe the procurement type.

Field 2: Request For

Select the category which describes the request type.

Field 3: Title

This field is limited to 50 characters and should <u>not</u> include the Vendor Name and include intuitive key words (i.e., Summer 2025 Leadership Conference, Data warehouse software purchase). Avoid generalities (i.e., hotel event, software). Note: CnP may revise the title for clarity purposes.

Field 4: Description

Provide a brief description of the purchase being requested such as who will use the goods/services being purchased, what will be provided etc.

Field 5: Preferred Vendor

List the preferred vendor for this purchase. **Ensure vendor is set up in PaymentWorks.** If not, departments should act to send an invitation to the vendor from PaymentWorks. The contracting process cannot proceed until the vendor has a PeopleSoft Vendor ID.

Field 6: Funding

Select the appropriate funding source. If UTS Cost Center or UTS Project is selected, the Requestor will be prompted to enter the cost center number(s) or the project number. UTS Project Numbers begin with an "X." Cost Centers and Projects are accounting data. Do not use department specific identifiers.
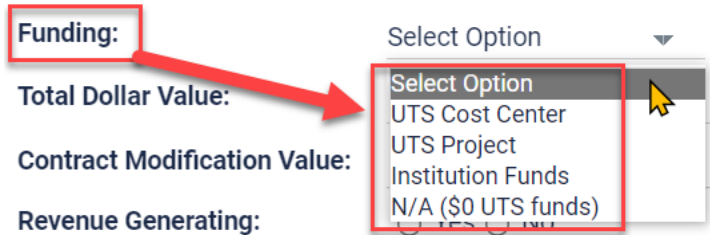
Field 7: Total Dollar Value

Enter the total value which must include all known renewals, amendments, and addendums.

Field 8: Contract Modification Value

Enter the value of the modification only. (Example: the contract has a value not to exceed $1,000,000 but your modification value is $30,000.)

Field 9: Revenue Generating

Most contracts or agreements do not generate revenue for UT System. However, if they do, ensure that the "Yes" radio button is selected. This information is needed for income reporting purposes.

Field 10: Authorized Approval

Department heads are responsible for managing funds committed from their department cost centers/projects; therefore, their approval is required. An email documenting the approval to engage the CnP Team in the procurement process is acceptable. If the department head has delegated authority for oversight of a particular cost center/project, this delegation should be referenced in the Delegated Signature System. In this case, the approval of the person with delegated authority is also acceptable.

Select the Attach icon to upload the approval documentation. Once a document is uploaded, the Delete icon displays in case the document needs to be deleted and replaced.

SECTION 3: REQUEST DATES

Requestors will provide key date and term information in this Section.

Field 1: Preferred Effective Date

Enter or select the Calendar icon to provide the effective date of the procurement (i.e., the start date of the service).

Field 2: Term

Enter the period for which the contract/agreement will be in force (number + length). The length selections are Year, Month, and Day. Minimum value is 1 Day. This is the initial term of the contract, not including renewal(s).

Field 3: Renewals

The default is "None," however, if option for renewal is preferred, select "Options." A table will display for the Requestor to enter the options and period. In the screen shot below, the user has selected a Term of three years with three 12-month options for a total of six years.

Term:	3	*	Year	▼	*
Renewal:	Options	▼	←		

Option Period	Duration (months)
1	12
2	12
3	12

+ Add Row   ▬ Remove Row

If more than one option period is needed, select the **+** Add Row Button to add additional option fields. Select the **-** Remove Row if rows were added in error.

SECTION 4: DATA GATHERING

In this section, questions are asked to gather the appropriate data to process the procurement request. If "Yes" is the response to any question, required documentation must be uploaded in order to Submit the Request Form. The Contract Risk Assessment and Contract Monitoring and Closeout Plan are not required documents but may be required before executing the procurement agreement. Remember, *Requestors may "Save" a work-in-progress Request Form and Submit once all required documents have been uploaded.*

Technology Purchase?:	◉ Yes ○ No ❓
Technology Purchase Approval:	➕ ❓
Vendor Access to University Data?:	◉ Yes ○ No ❓
PSQ Determination:	➕ ❓
ISO Approval:	➕ ❓
OGC Approval Required?:	◉ Yes ○ No ❓
OGC Approval:	➕ ❓
EAJ?:	◉ Yes ○ No
Department Signed EAJ:	➕
Formal Solicitation?:	◉ Yes ○ No
Request for Proposal Intake Form:	➕
Contract Risk Assessment:	➕
Contract Monitoring & Closeout Plan:	➕

SECTION 5: SUPPORTING DOCUMENTATION

Any documentation necessary to process the request and not already uploaded in the previous section can be uploaded in this section. Be sure to add a description of the document (i.e., quote, supporting emails, partially executed agreements, etc.)

SECTION 6: REQUESTOR INFORMATION

Provide the requestor name and department. The name field should pre-populate with the username based on their login. Select the department from the drop-down list. The PeopleSoft Department Name will display to the right of the Department Name. A search for OES100 will display all executed contracts regardless of what the department name was at the time the contract was executed (i.e., Personnel, Human Resources, Employee Services, and Talent and Innovation).

SECTION 7: CONTRACTS AND PROCUREMENT INFORMATION

Once the Request has been assigned to a CnP Team member, their name will display here for reference. If the requestor wishes to provide a specialized note for the team member, they may do so in this Section. Note, there are additional places on the Request Form to provide notes to CnP as well.

SECTION 8: COMMENTS

Comments can be shared in this Section between the requestor and CnP Team members.

SECTION 9: BUSINESS METRICS

This Section is populated by CCARS and provides key metrics for the Requestor on the workflow of the Request and final executed contract/agreement. Additional key performance metrics are captured by CnP management as well.

SECTION 10: TASKS

In this Section, a CnP Team member can assign a task to the Requestor if additional information or documentation is needed.

SECTION 11: NOTES AND ATTACHMENTS

This Section can be used to provide miscellaneous notes and documents as the contract proceeds through the workflow. This could include emails with a vendor related to the statement of work etc.

SECTION 12: CONTACTS

Key contact information can be provided in this Section. This could include the vendor contact information.

SECTION 13: INTERNAL USE ONLY

This Section is only available to the CnP Team.

SAVE AND SUBMIT THE REQUEST FORM

SAVE

Once all required fields are entered, the Requestor may "Save" the form by clicking the Save button at the bottom of the form. If all required fields are not entered, the Requestor will receive an error message and all fields not entered will be noted in red.

The Progress Bar at the top of the Request will change. The Status will change to Draft and the Workflow will now display Draft as well. The Status and Progress Bar will advance as the Request moves forward.

If the Requestor attempts to Save the Request Form with no changes made from the previous Save, an error message will display. Each time the Form is saved or changed in any way by the Requestor or the CnP Team, the Revision number will advance. This number is in the upper right corner of the Progress Bar.

★*TIP: Requestors should make note of the Request ID located under the Status displayed on the left of the Progress Bar. They will be able to locate Request Forms more easily when using this unique ID.*

SUBMIT

Once the Requestor has all fields entered and all required documentation uploaded, they may Submit their Request Form. The Action Buttons at the bottom of the Request Form will display only the buttons available based on the Request status and the access permissions of the user.

Other Action Buttons displayed above include Cancel, Copy, Email, Download, and History.

NOTIFICATIONS

The Requestor will receive various email notifications as the Request moves through the contracting and execution workflow. Below is a list of the more common ones Requestors may receive:

Request has been returned	Request is in solicitation
Request has been rejected	Request is contracting
Request has been cancelled	Contract Status has been updated
Request has been accepted	Comment has been added by Contracts & Procurement
Request is in progress	Requestor has changed
Request has been completed	Contracts & Procurement team member has changed
Request has been placed on hold	

ICON DESCRIPTIONS

CCARS contains a variety of icons used to visually represent various functions in the application. Many of these icons can be clicked to activate their functionality. Below is a list of the most common "clickable" icons and their related functions.

	Edit	Allow users to edit existing forms. Click on the icon and the form will display ready for editing.
	View	Allows users to view on-line forms in read-only format.
	Lookup	Allows users to view source information that can be selected to automatically complete the specific field it is related to.
	Calendar	Allows users to view a calendar for date selection. Date selector buttons are found throughout the system.
	Attach	Displayed in Attachment fields on a form and are used for the initial attachment of a document to the Request Form. Attachment may be done using the browser's upload dialog or using drag and drop functionality.
	Replace	Displayed next to an attached document after saving the Request Form and enables the user to replace the attached document with a new document. Replacement may be done using the browser's upload dialog or using drag and drop functionality.
	Revert	Displayed beside the green Replace icon when a saved document has been replaced but the form has not yet been re-saved. Clicking this icon reverts the replacement made in the attachment field and places the previous attachment back in that field.
	Delete	Displayed next to a Replace icon upon **initial** upload of a file into an attachment field and **before** the form is saved. This allows the user to immediately delete the attachment if desired before saving the form. This icon disappears upon saving the form.
	Search	Located in the Advanced Search, the Search options button is available to help define date field values or select drop-down field options.
	Run	Runs the related search or produces previewed results of the related report.
	Group	Identifies the related search or report as a "Shared Search" or a "Shared Report." The results of a shared search or report are shared amongst all the members of a group as defined by the Access Control lists which are defined by the administrator.
	Delete Button	The Delete button icon is found in various windows and allows users to delete an entry. For example, the delete button next to the To, Cc or Bcc fields in the email screen, deletes that specific line of data.
	Expand Collapse	The Collapsed section icon and the Expand section icon appear on sections in a form or in certain lists.
	Compare	A compare documents link or icon exists on many forms which provides the ability to compare any version of an attached custom document.
	PDF	Usually found next to a document link on a form, this red and grey PDF icon identifies that the related document is in PDF format.

	Word Redline	A red word icon indicates a Word Redline document can be downloaded to create a document for negotiating and tracking customized changes.
	Off-line Data	The blue and red word icon indicates a Word Off-line document can be generated and may later be used to upload field details into the related ASC on-line form.
	White Approval	The white Approval icon indicates the adjacent field has a default value that requires approval if modified. Hover over the icon to display the default value, who approves any changes to the value and the status of the approval e.g.: "To be Submitted."
	Yellow Approval	A yellow Approval icon indicates the default value in that field has been modified and approval is required. Hover over the icon to display the approver, the status of the approval and the initial default value.
	White Approval With Check Mark	A white Approval icon with a check mark indicates the field did require approval and has now been approved.
	Help	Some fields display Help icon. This indicates there are more details to display about the field. Hover over the icon to display the additional information.

CONTACT

For any questions or assistance, please contact the Contract and Procurement Team.

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