Contraxx User Guide

For University of Pittsburgh

Office of Research

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INTRODUCTION

PURPOSE

Contraxx is a contract management system licensed from Ecteon. The Contraxx software has been configured by Ecteon in support of contract management requirements for the Office of Research (OR) at the University of Pittsburgh (Pitt). This document describes the major functions supported by the application and provides information about the user experience.

ABOUT THIS DOCUMENT

The intent of this document is to familiarize Pitt administrators with the electronic subaward request form and to provide a reference for their everyday usage of Contraxx.

Note: Your environment may vary in some ways from the examples provided in this document.

PREREQUISITE SKILLS

This document assumes that the Contraxx user is familiar with basic Windows and Web-based applications as well as your organization’s contracting and contract management practices.

BROWSER INFORMATION AND SETTINGS

The Contraxx software is deployed via a web browser, available on either a PC or Mac computer. The Contraxx portal is compatible with the following web browsers: Edge/Internet Explorer 8 or higher; Firefox 28.0 or higher; Safari 6 or higher; Chrome 36 or higher.

To avoid printing errors, users should ensure browser security settings allow pop-ups from https://upitt.contraxxhost.com/OORPortal. To enable pop-ups for Firefox, Chrome, Internet Explorer, or Safari, click on the corresponding links for instructions.

APPLICATION TIME OUT

The application has a time out feature that will automatically log the user out after a set period of inactivity. (e.g. 60 minutes). The application will auto save the record at regular intervals and upon subsequent login by the user, they will be returned to the last open record’s saved state.
FORM ACTIVITIES FOR SUBAWARD REQUESTERS

This section describes form functionality that is common to Subaward Requesters.

HOW TO LOG INTO CONTRAXX

Start a web browser on a PC that can connect to the web server. Enter the URL for the Production Portal site: http://pi.tt/subawards

If not already logged into Pitt’s network, enter Pitt Single Sign-On credentials. If the login is successful, the user’s assigned dashboard will be automatically presented.

DASHBOARD OVERVIEW

The dashboard is the first screen a user sees upon signing into the application. It’s the central organizing screen for interaction with contract data. The dashboard for a Subaward requester consists of:

- A listing of the Subaward Requests that are in process for the current user. The first column is hyperlinked, and clicking the hyperlink opens the corresponding record.
- A link to create a new subaward request.
- A listing of the user’s executed and active subawards.

HOW TO LOG OUT OF CONTRAXX

When a user is ready to exit the application, it’s good practice to click the Logout link in the upper right corner of the dashboard. This will end the individual session and keep the number of concurrent users to a minimum.

HOW TO REQUEST A NEW SUBAWARD
Click on the dashboard link “Create New Subaward Request”. The user is presented with a request form, a partial extract of which is shown below:

| Required fields are marked with red flags to the right of the response. Note that the red flag will disappear once the response to the question has been provided, which makes it easier to identify the outstanding responses. |
Some responses may be pre-filled based on form rules and defaults.

Some questions provide tooltips. Wherever the icon is shown next to a question, additional information appears in a popup box when the cursor is positioned over the icon.

HOW TO SELECT THE SUBRECIPIENT

To prevent the duplication of Subrecipient records (aka Contracting Parties), the user is required to perform an initial search for the Subrecipient. By clicking on the Find or Enter Subrecipient link next to the question labeled Subrecipient, the Contracting Party Search form is presented:

The search process is flexible – it’s case-insensitive, and will search any part of the company name for the text the user enters. The application will also search the alternate name list, if additional names are provided for a company (e.g. “AmFam” and “American Family”). So in most cases, if the party is already in the Contraxx database, the search will find it.

The user should at this point provide one or more search criteria:

- The search boxes are case insensitive (e.g. entering ‘abc’ will return ‘ABC’).
- The application will search for all records that have the given search parameter anywhere in the field (e.g. entering ‘univers’ will return ‘Harvard University’).
- To return all companies accessible to the user, enter ‘%’ in the Company Name search box (or in any non-date, non-numeric search box).
- “Contract Count” refers to how many contracts are with the contracting party. For example, if you enter 5 to 10, the search will return parties with which Pitt has executed 5 to 10 contracts. This is a field unlikely to be used by a requester.

While default fields are pre-selected for the record results display, additional fields may be selected or currently selected fields may be unselected in the “Search Options” section.

After filling in a minimum of one search box, start the search by clicking the Search button.
If any records are returned by the search, they will be shown in the search results grid.

If the desired Contracting Party is included in the results list, click on the corresponding Contracting Party Name link. The user is then automatically returned to the Request Form where the Subrecipient response is populated with the selected Party.

**HOW TO CREATE A NEW SUBRECIPIENT**

If the user determines via the previously described search that the Subrecipient does not yet exist, the user should proceed with the creation of the new Contracting Party record by clicking on the New Company button at the bottom of the search form. After this button is selected, the Company Profile tab is displayed.

The **Company Profile** tab captures the basic information about the Contracting Party.
Fill in the appropriate fields noting that field labels with an asterisk are mandatory fields. All other fields are optional. The Status is pre-set to “Requested”.

An Administrative user of the application will periodically review and verify the Contracting Parties that have been “Requested” as a second line of defense to prevent duplication of Party records. If a new party record looks okay, the administrator switches the status to ‘Verified’. If a new party record is determined to be a duplicate, the Admin invokes the ‘Assign’ button in the party record to reassign all request forms/activity from the duplicate record to the original record, and the ‘Recycle’ button is used to remove the duplicate record.

The following optional sections are present and may contain multiple lines of data:

**Additional Contracting Party Names:** Captures any additional names that the Party may use (Nickname/AKA/FKA/DBA).

**Additional Addresses:** Captures address locations. Once entered here on the Contracting Party record, they will automatically populate to the contract record upon request submission.

**Relationships:** Captures third party relationship information. Select the third party via the search field and select the relationship type from the dropdown list. Requesters are unlikely to use this field.

Any number of rows may be entered by clicking the button. To delete a previously entered row, click on the button to the right of the entry. A warning message validating the deletion will be presented prior to the deletion taking place.

When finished with the entry of information for the Contracting Party, click the **Save and Close** button on the button row under the Company Profile tab image. Completion of the Contracting Party creation process will result in the user being returned to the Request Form with the newly created Party present in the Subrecipient response.

**USING THE ADDRESS BOOK IN SECTION E**

The Address Book appears when users click on the links to search for “Pitt Administrative Contact”, “Pitt Principal Investigator” and “Pitt Financial Contact”. Users should first look for names in the “Look for” field by entering in part or all of a last name and clicking “Find”.

- Once the name is found, select the name, and click “Accept” The user is then automatically returned to the Request Form where the name is populated into the appropriate field.
- If the name is not found, click “Add” to add the name, address, phone, and email of a new contact
- Users should ensure the contact information is up to date by clicking “Edit”, and making revisions as necessary.
- Requesters should **never delete** contact names in the Address Book.
HOW TO SAVE A REQUEST

Clicking the Save for Later button near the top of the Request Form adds the request to the Requestor’s “My Subaward Requests” queue. The Requestor can come back later to complete the form.

Note that there are 2 questions that require responses prior to being able to save the request. If not complete, the user will be alerted via a popup message.

- Subrecipient (in Section C)
- Responsibility Center (in Section E)
HOW TO CANCEL CHANGES MADE TO THE REQUEST

Clicking the **Cancel** button will return the user to the Dashboard (after a confirmation prompt), with no changes saved on the Request Form.

HOW TO SUBMIT A COMPLETED REQUEST

Click the **Submit** button near the top of the Request Form to submit the Request to the Office of Research. Note that if all required responses have not been provided, the Request won’t be submitted; instead the user will see popup message indicating the missing fields on the Request.

![SUBAWARD REQUEST FORM](image)

When the Request is successfully submitted, the user can monitor the status of their subaward request through their dashboard. The statuses are:

- Initial Entry Complete
- In-negotiation
- Negotiations Complete
- Out for Signature
- Signatures obtained
- Contract Active

QUESTIONS

Contact the Office of Research for any questions or website errors.

Call 412-624-7400 or email an Office of Research team:

Subawards issued by the Grants Management Team: subawards@pitt.edu

Subawards issued by the Federal Contracts Team: orfedcon@pitt.edu

Subawards issued by the Clinical and Corporate Contracts Team: clincorp@pitt.edu