



Contract Analyst Overview

Solid, Reliable, and Proven
Contracts Management System

TrakSoft LLC
www.ContractAnalyst.com
www.TrakSoft.com

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Welcome, and thank you for your interest in Contract Analyst! First released in 2004, Contract Analyst is a solid, reliable, and proven contracts management system. This presentation will highlight the main modules, e-mail alerts, user customization, reporting features, the search engine, system administration, security, and other features found in Contract Analyst.

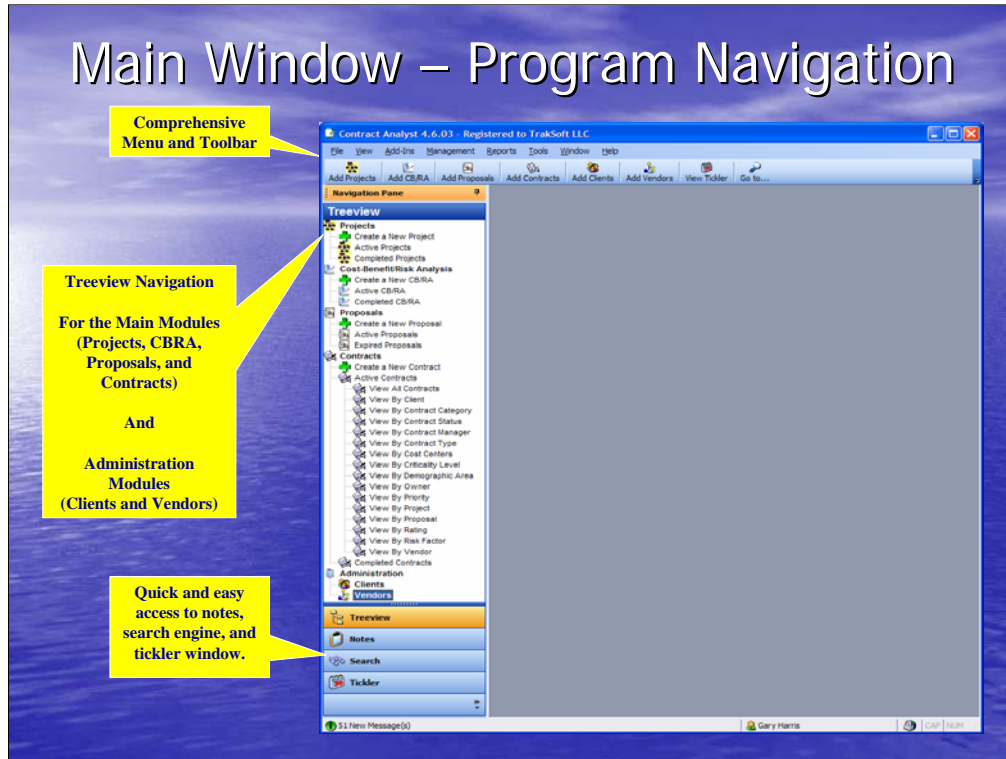
Program Modules

- Main Modules
 - Projects Module
 - Cost Benefit/Risk Analysis Module
 - Proposals Module
 - Contracts Module
- Support Modules
 - Vendors Module
 - Clients Module
 - Correspondence Tracking Module

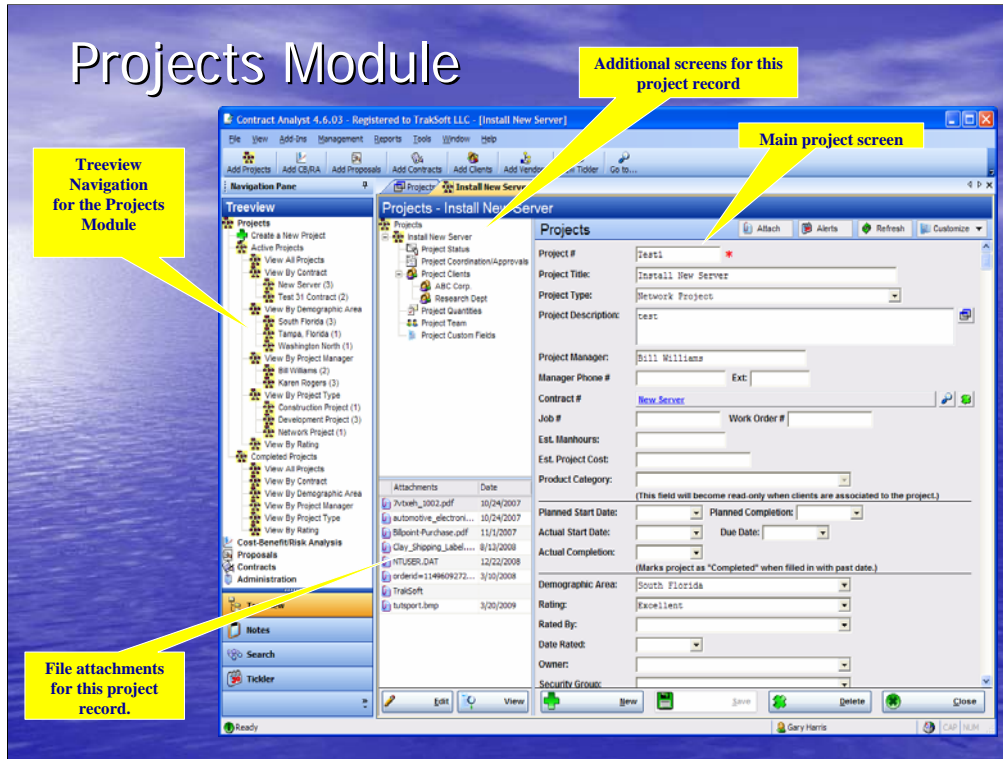


Contract Analyst has four main modules and three support modules. The Main Modules include the Projects, Cost Benefit/Risk Analysis, Proposals, and Contracts Modules. The first three main modules provide pre-contract award management and tracking capabilities. The Contracts Module is used for managing contracts from award to completion. The Support Modules include the Vendors, Clients, and the Correspondence Tracking Modules. We will now cover the features of these modules in the next few slides.

Main Window – Program Navigation

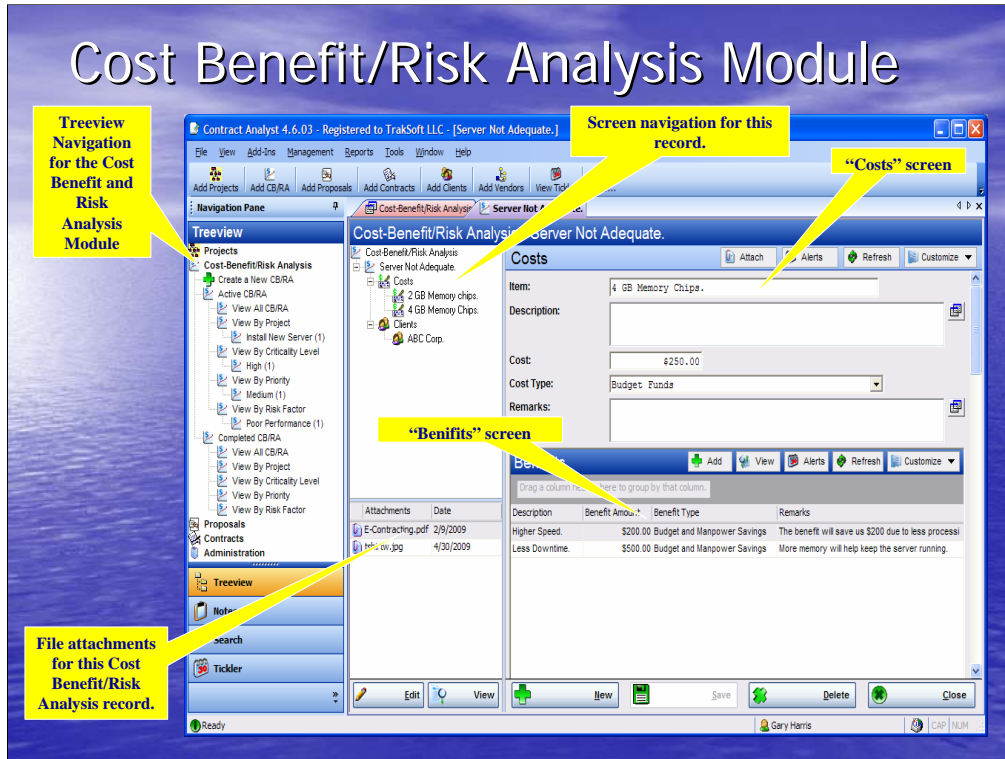


Navigating the program modules is simple and intuitive using the menus and treeview. Notice that the main modules are ordered in the treeview in the proper workflow, from the projects module to the contracts module. Because of the flexibility of Contract Analyst, you are not required to use all of the modules. You can pick and choose which modules you need. If you do not plan on using a particular module, you can simply hide it. Please note that as you go through this presentation, we have utilized standard contracting terms when naming our modules, screens, windows, and fields. We don't make up names for these items, such as widgets and handles. This adds to the intuitiveness of the application.



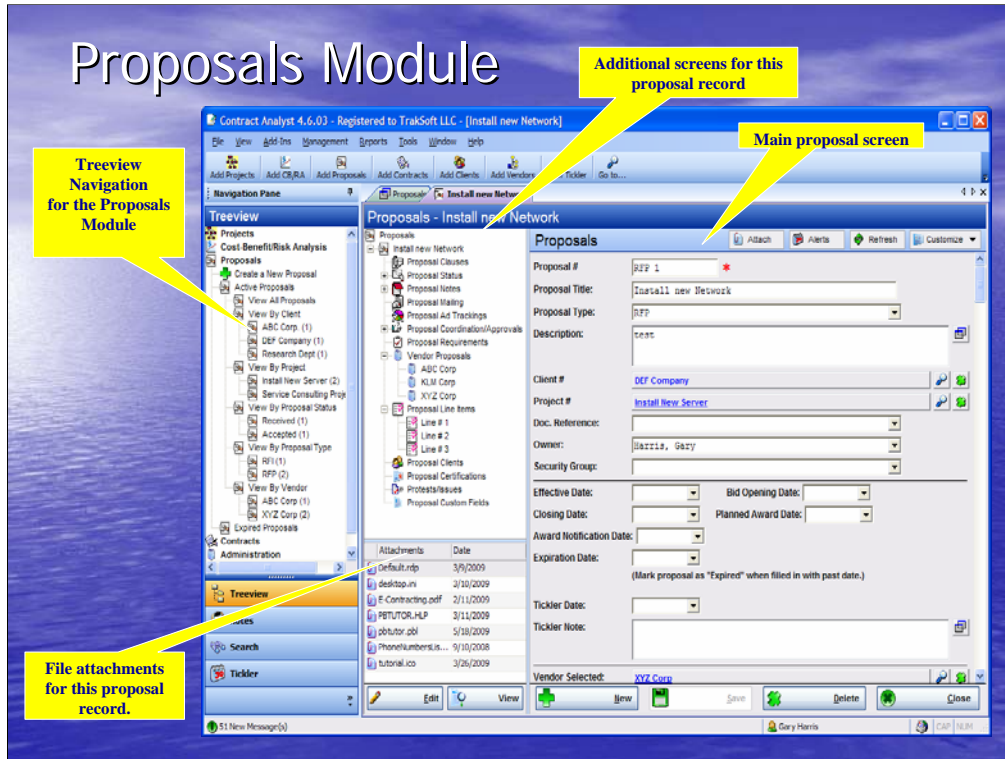
The Projects Module provides the capability for defining the project and low level project tracking. In addition, one or more proposals and contracts can be associated to specific projects. As we proceed through this presentation of Contract Analyst, you will note that the look and feel from one screen to another is the same. This intuitive feature makes the program easy to work with because you will not have to learn how to use each individual screen separately. The treeview on the left allows you to view your project lists in a variety of views, such as by contract, demographic area, project manager, project type, and rating. When you have a project record open, the main project record screen appears to the right and a center treeview appears so you can navigate to the other screens within that project record. Notice that there are six other screens available. There can be multiple records for each screen as depicted for the Project Clients Screen. In addition, the File Attachments List appears below the center treeview so you can view the documents that are attached to this record. You simply need to double-click on an attachment to view it.

Cost Benefit/Risk Analysis Module



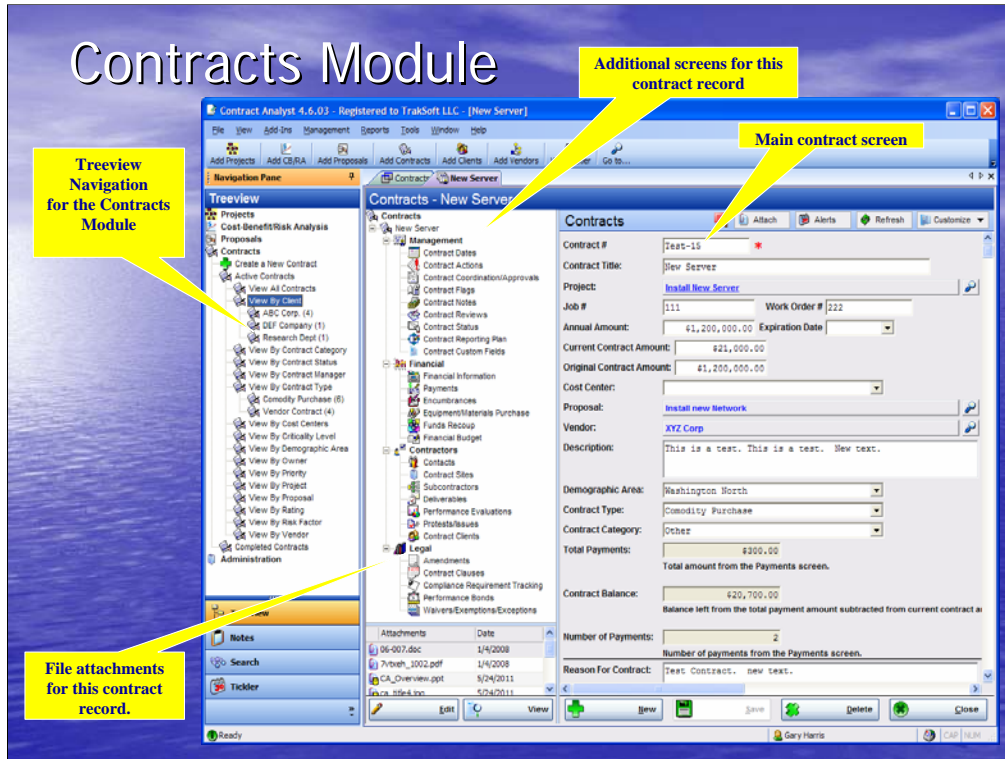
If you have a need to conduct a cost-benefit analysis and/or risk analysis prior to starting the contracting process or publishing a request for proposal or quote, the Cost-Benefit/Risk Analysis Module provides the capability to perform a basic cost-benefit analysis and/or risk analysis. Similar to the Projects Module, the left treeview provides list "view by" navigation, the center treeview appears providing record navigation, and the file attachments list appears under the center treeview.

Proposals Module

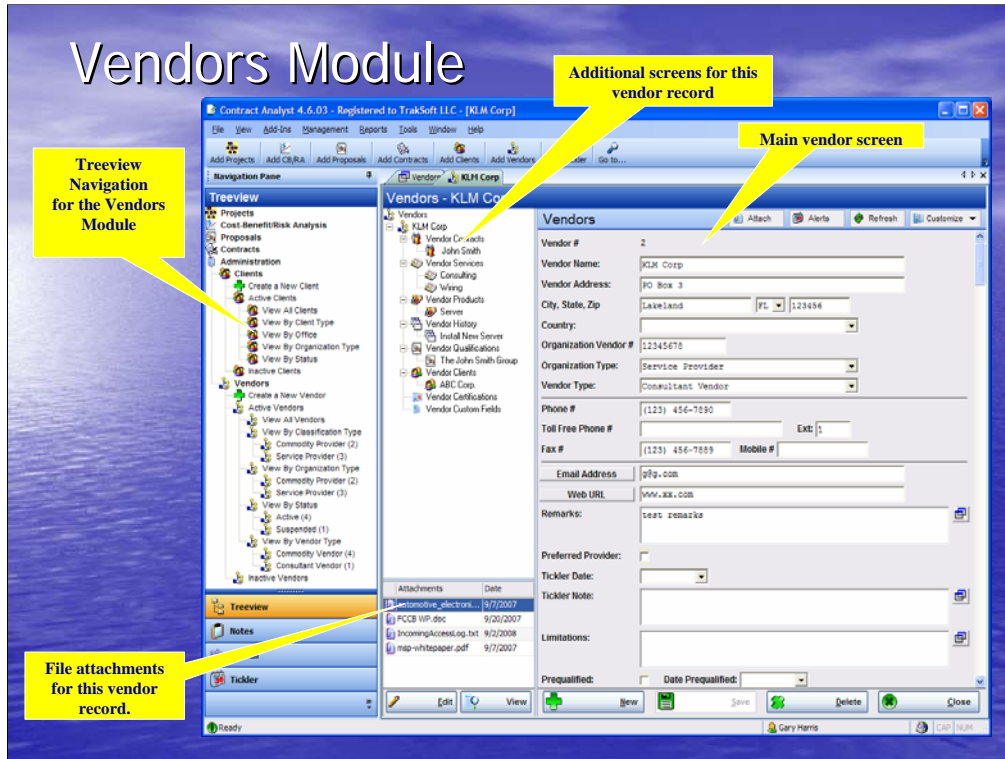


The Proposals Module provides the capability to create and manage proposals, Request For Proposals (RFP), Request for Quotes (RFQ), Request for Information (RFI), Invitation to Bid (ITB), or any other similar instrument that your organization uses in this pre-award contract process. In addition to creating and managing these items, you can track advertising performance, request coordination and approvals, received proposals, proposal scoring, and vendor selection. If you are a contractor, this module can help you create and track the proposals and bids you submit.

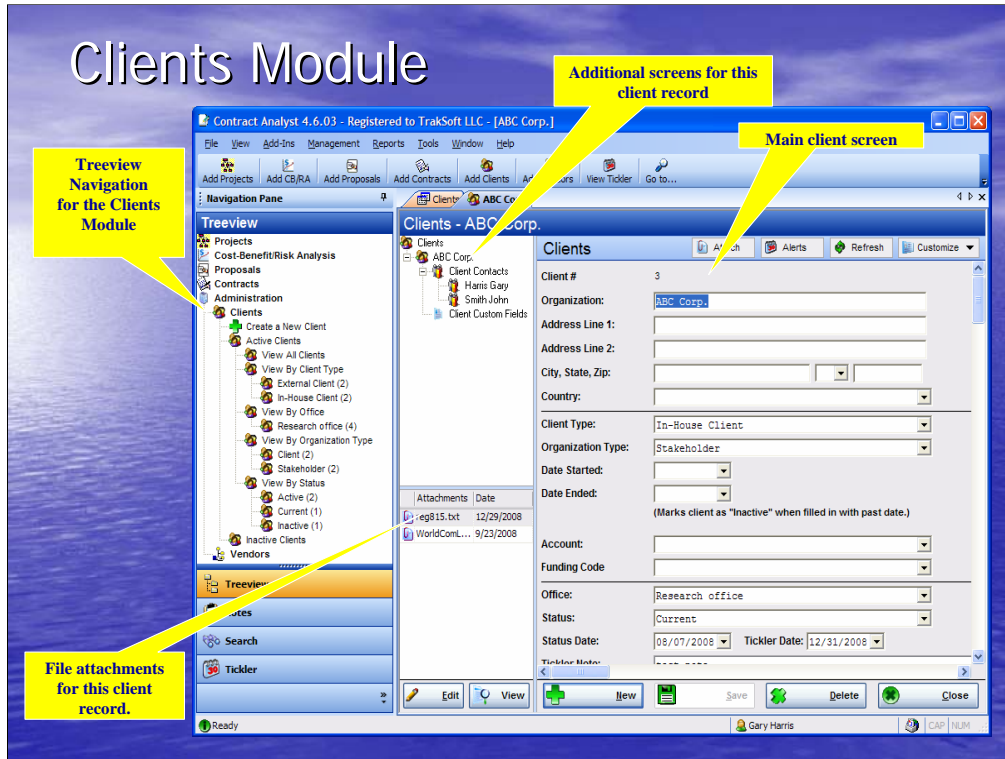
Contracts Module



The Contracts Module is the “meat and potatoes” of Contract Analyst. This is where you manage and track contracts after award through completion. You can manage virtually any type of contract, agreement, license, or other similar instrument within this module. This module is divided into four sub-modules, which include several screens as shown in the center treeview. As part of the User Customization feature, you can pick and choose which screens you have a need to use and hide the ones you don’t need. Later we will cover User Customization, which provides the capability to customize the application to meet your needs. With Contract Analyst, you can change the program to work with your organizational processes and procedures and not need to change your processes to use Contract Analyst.



The Vendors Module provides a powerful and easy-to-use tool for tracking and managing your vendors. This module maintains the vendors list, vendor information, contacts, qualifications, vendor products and services, certifications, and history. Contract Analyst provides the capability to maintain the performance history of your vendors. This will come in handy when you are evaluating a vendor during the selection process because you will be able to review the previous performance history of vendors to help you in selecting a vendor for a project.



The Clients Module provides the capability to capture and maintain client information. The Clients Module can manage both internal clients, such as departments or offices within your organization, and external clients, which are clients outside your organization. For example, if you are a contractor, your client is the organization who awarded you the contract (external client).

Correspondence Tracking Module

The screenshot displays the 'Correspondence Tracking' module within the 'Contract Analyst 4.6.03' application. The interface is divided into several sections:

- Correspondence Tracking List Screen:** A table listing tracking items. The visible data is as follows:

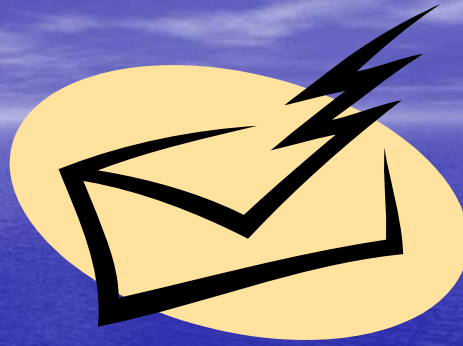
Item Name	Date Received	Received From	Received From Phone	Status	Item Description
Records Audit	08/01/2011	HQ	(123) 456-7890 x 123	Completed	Annual records audit.
Southern Division	02/02/2011	HQ	(123) 456-7890	Received	Gather all rec
- Correspondence Tracking Window:** A detailed form for a specific record. The data shown is:

Item Name:	Records Audit		
Item Description:	Annual records audit.		
Received From:	HQ	Date Received:	08/01/2011
Received Phone #:	(123) 456-7890 Ext: 123		
Reply Due:	08/31/2011	Date Reply Mailed:	08/26/2011
Status:	Completed	Status Date:	08/26/2011
Assigned To:	Johnson, Carl	Assigned Due:	08/29/2011
Last Follow-up:		Date Received From Assigned:	08/26/2011
Contact:			
Contact Phone #:		Ext:	
Owner:	Jones, Mary		
Security Group:	Standard		
Tickler Date:	05/01/2009		
- File attachments for this client record:** A callout pointing to the 'Attach' button in the tracking window.
- Correspondence Tracking can be found in the "Add-Ins" Menu:** A callout pointing to the 'Add-Ins' menu item in the application's main menu.

The Correspondence Tracking Module, found under the Add-Ins Menu, makes the tracking incoming correspondence simple. This is important for those pieces of correspondence received that require some kind of response or task. This module will help ensure that response or task deadline is not missed by providing the mechanism to assign and track the task.

E-Mail Alerts

- Powerful
- Flexible
- Easy to Set
- Message Groups
- Set on "any" type of field



Contract Analyst comes with a powerful and flexible E-Mail Alert System. It provides the capability to set an e-mail alert on almost any field within Contract Analyst. Unlike most systems on the market that can only set e-mail alerts on date fields, users can set e-mail alerts on any type of field, such as date fields, monetary fields, status fields, and other types of fields within the system. For example, the system can send an e-mail alert when a certain date has been reached, a dollar amount has reached a certain limit, a specific status has been changed, or even when a record has been added, changed, or deleted.

E-Mail Alert – Change to Record

The screenshot shows the 'Edit Alert' dialog box with the following settings:

- Title:** ContractChanges
- Owner:** Harris, Gary
- Frequency:** Send Immediately
- Action Type:** Any changes are made.
- Alert Scope:** Check for any record in the list.
- Enabled:**
- Message Settings:**
 - To:** Donald Duck (Email:Donald@Disney.com)
 - Subject:** Changed Record
 - Message:** A change to this record has been made.

Callouts provide additional information:

- Sends E-Mail Alert Immediately!** (points to Frequency)
- This Alert sends an E-Mail Alert when "any" changes are made to any record on the list. You can also create an alert for when records are added or deleted.** (points to Action Type)
- E-Mail Alerts can be sent to one or several individuals, or you can create an e-mail message group for sending to those individuals you send e-mail alerts to often.** (points to To)
- You can create a custom subject and message for each E-Mail Alert** (points to Subject and Message)

This is an example of an e-mail alert that sends an alert when a change has been made to a contract record. This alert is set for any contract record in the list and is sent immediately after the change is made.

E-Mail Alert – Set on Date Field

The screenshot shows a 'Custom Action' dialog box with the following fields and options:

- New Condition:** Set the condition for this alert to be triggered.
- Field Name:** Expiration Date
- Operator:** Is Between Current Date To Current Date + 30 Days
- Conditions:** Expiration Date Is Between Current Date To Current Date + 30 Days
- Alert me if these conditions occurs for:** any record in the list.

Buttons: Add Condition, Remove, Edit Item, OK, Cancel.

Callout 1 (top right): This Alert sends an E-Mail Alert when an expiration date is within 30 days.

Callout 2 (left): This custom alert only has "one" condition. You can set an E-Mail Alert that has multiple conditions.

Callout 3 (right): This E-Mail Alert is set for any record in the list.

This is an example of a custom alert on a date field. The e-mail alert is sent daily on any record in the list starting 30 days prior to the expiration date and will stop sending the daily alert on the expiration date. This is only one of many variations of setting date alerts.

E-Mail Alert – Set on Status Field

This Alert sends an E-Mail Alert when the status is changed to “completed”.

This E-Mail Alert is set for any record in the list.

This is an example of an e-mail alert set on a “status” field. This will send an e-mail alert on any record in the list where the status changes to “Completed”.

E-Mail Alert – Sum of Payments

This Alert sends an E-Mail Alert when the the sum of the payments recorded reaches or exceeds \$800,000.

Custom Action

New Condition
Set the condition for this alert to be triggered.

Field Name:

Operator:

Alert me if the Sum of all records belonging to the Parent match this condition.

This is an example of an e-mail alert set on the “payment amount” field. It will send an e-mail alert when the sum of the payments reaches or exceeds \$800,000. This is a valuable alert type if you have a need to be aware of getting near your budgeted amount.

E-Mail Alert – Multiple Conditions

This Alert sends an E-Mail Alert when

1. The due date is within 30 days,
AND
2. The “Action Type” is set to “Follow-Up” Action
AND
3. The “Status” is set to “In Work”

This custom alert only has multiple conditions.

This E-Mail Alert is set for a specific record.

You can set up e-mail alerts that have multiple conditions. This is an example of a multiple conditions alert. This will send an e-mail alert when three conditions exist on a record. First, the “due date” must be within 30 days of the current date. Second, The “action type” must be set to “Follow-Up Action”. And finally, the “status” must be set to “In Work”.

Message Groups

Create a message group to select for e-mail alerts for individuals that need to be added to several e-mail alerts.

Edit Message Group

Group Settings
Title: Standard Group
Owner: Harris, Gary

Send to an Email Address
Display Name: |
Email Address:
Add Email

Send to an Internal User
User:
Add User

Donald Duck [Email:DonaldD@ContractAnalyst.com]
George Washington [Email:GeorgeW@ContractAnalyst.com]
John Wayne [Email:JohnW@ContractAnalyst.com]
Mickey Mouse [Email:MickeyM@ContractAnalyst.com]
Remove

Save Cancel

If you have a need for sending e-mail alerts to the same group of people often, you can set up a message group. This is an example of a message group containing four individuals. If this message group is selected when setting up an e-mail alert, all four individuals will receive the alert. This makes setting up e-mail alerts much easier because you don't have to enter in each individual for each alert.

User Customization

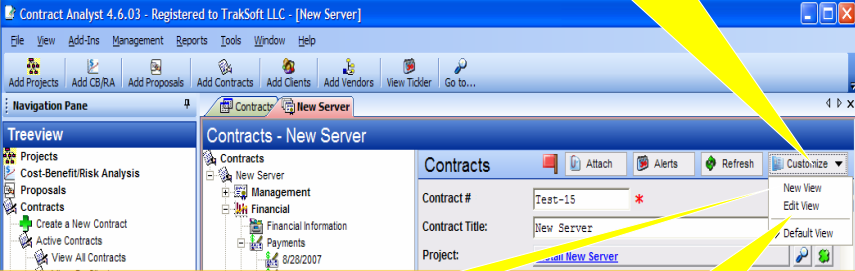
- Rename, move, hide, or reorder data fields
- Make data fields "mandatory" or "read only"
- Add new data fields (Enterprise version only)
- Rename or hide windows and screens
- Add new screens (Enterprise version only)
- Create multiple views for individual screens
- Add, edit, or delete items in drop-down list fields
- User customizations carry over to reports



You will find that the User Customization capabilities in Contract Analyst is extremely powerful, making the system very flexible. They give you the capability to rename, move, hide, or change the order of data fields on a screen. You can also make fields mandatory, meaning that the user must enter data in the field before the record can be saved. New data fields and screens can be added within the Enterprise Version of Contract Analyst. Entire windows and screens can be renamed or hidden if you don't need them. In addition, you can create multiple views of an individual screen or window. For example, if you want to display fields A, B, and C for one type of contract, and display fields D, E, and F for another type of contract, that can easily be accomplished by creating screen view for each one. Additionally, there are several drop-down list fields used throughout Contract Analyst. You can customize these list to meet your needs by adding, changing, or deleting items in these lists. It is important to note that all changes to the data fields carry over to reports. For example, if you rename a field, the renamed field will show up in your reports with the new name.

Screen and Window Customization

If logged on as a System Administrator, a "Customize" button will be displayed at the top of most screens and windows. Each window has a "Default" view.



The screenshot shows the 'Contract Analyst 4.6.03' application window. The title bar reads 'Contract Analyst 4.6.03 - Registered to TrakSoft LLC - [New Server]'. The menu bar includes 'File', 'View', 'Add-Ins', 'Management', 'Reports', 'Tools', 'Window', and 'Help'. Below the menu bar is a toolbar with icons for 'Add Projects', 'Add CB/RA', 'Add Proposals', 'Add Contracts', 'Add Clients', 'Add Vendors', 'View Ticker', and 'Go to...'. A 'Navigation Pane' on the left shows a tree view with 'Projects', 'Proposals', and 'Contracts'. The main area is titled 'Contracts - New Server' and contains a 'Contracts' form with fields for 'Contract #', 'Contract Title', and 'Project'. A 'Customize' button is located in the top right corner of the form area. A dropdown menu is open, showing options: 'New View', 'Edit View', 'Default View', and 'Default View'.

"New View" allows you to create a new window view. Each view can display different fields for the same window.

"Edit View" allows you to modify the current selected view. This is where you would be able to move, hide, or rename fields on a screen or window.

Accessing the User Customization features is simple. When you have a screen or window open and logged in as a System Administrator, a "Customize" button will be displayed at the top right corner of the screen. You will have the option to create a new view or edit the current one. Initially, each screen comes with one "default" view. If the screen has more than one view, then they will show up in this drop-down menu so you can select the one you want. You can also set the default view for a record so that view comes up each time the record is opened.

Customize Screen Window

The screenshot shows the 'Customize Screen - Contracts' window. At the top, it displays the screen title 'Contracts' and a 'Change View' button. Below this is a table listing field properties:

Caption	Field Type	Visible	Enabled	Required	Read-Only	Display Length	Text Flows	Description
Contract #	Single-line Textbox	Yes	Yes	No	No	15	1	
Contract Title	Single-line Textbox	Yes	Yes	No	No	50	1	
Project	Assign Control	Yes	Yes	No	No	50	1	
Job #	Single-line Textbox	Yes	Yes	No	No	16	1	
Work Order #	Single-line Textbox	Yes	Yes	No	No	15	1	
Annual Amount	Masked Edit Control	Yes	Yes	No	No	15	1	
Expiration Date	Date Control	Yes	Yes	No	No	10	1	
Current Contract Amount	Masked Edit Control	Yes	Yes	No	No	15	1	
Original Contract Amount	Masked Edit Control	Yes	Yes	No	No	15	1	

Below the table are buttons for 'Edit Item', 'Insert Line', and 'Remove Line'. The main area is divided into 'Available Fields' (left) and 'Visible Fields' (right). The 'Available Fields' list includes items like 'Workflow Set', 'Template Flag', 'Enforce Workflow', 'Workflow Key', 'Subprogram Type', 'Program Type', and 'Security Class'. The 'Visible Fields' list shows a hierarchical tree structure for the screen, including rows for 'Contract #', 'Contract Title', 'Project', 'Job #', 'Work Order #', 'Annual Amount', 'Expiration Date', and 'Current Contract Amount'. Callouts point to various parts of the window: 'Displays all the fields and field properties for the screen being edited.' (points to the table), 'Displays all available fields for a screen that is hidden and not being used.' (points to the Available Fields list), 'Displays all visible fields being used on a screen and their position.' (points to the Visible Fields list), 'Buttons that allow you to hide, unhide, and reorder fields.' (points to the arrow buttons between the field lists), 'Brings up the Edit Field Window allowing you to edit a selected field.' (points to the Edit Item button), and 'Button that allows you to insert a divider line on your screen.' (points to the Insert Line button).

When you select the "Edit View" menu item below the "Customize" button, the Customize Screen Window will be displayed. This window will allow you to hide or move fields around as well as adding divider lines between fields, which allows you to group similar fields together. The top section of the window shows all of the fields, displayed or hidden, and the field properties for the selected field. The bottom left section shows all the hidden fields. The bottom right section shows all of the displayed fields and their position. If you want to edit a field, simply select the field and then hit the "Edit Item" button. The Edit Field Window will then be displayed.

Edit Field Window

The screenshot shows the 'Edit Field - [action]' dialog box. It is divided into several sections: 'Appearance', 'Behavior', and 'Advanced Settings'. The 'Appearance' section includes fields for 'Caption', 'Item Caption', and 'Description'. The 'Behavior' section has checkboxes for 'Visible', 'Enabled', 'Required', and 'Read-only'. The 'Advanced Settings' section includes dropdown menus for 'Format', 'Action', and 'Look-up', and a checkbox for 'Is Title Field'. At the bottom are 'Save' and 'Cancel' buttons. Five yellow callout boxes point to specific features: 1. 'Allows you to set the captions on the screen and reports.' points to the 'Caption' field. 2. 'Allows you to edit the display size of a field.' points to the 'Text Rows' and 'Display Length' spinners. 3. 'Allows you to set the properties of a field.' points to the 'Field Type' dropdown. 4. 'Provides some advanced settings for specific types of fields.' points to the 'Advanced Settings' section. 5. 'Indicates that a field will show up in the center treeview when a record is being displayed.' points to the 'Is Title Field' checkbox.

The Edit Field Window provides the capability to edit a field on a selected screen or window. You can change the caption (field name) for the screen and the reports here. A description can be added that will show up on the screen to help users understand special fields. The properties of the field can be changed, such as the number of rows or characters displayed or making the field required or read-only. A field can easily be hidden by un-checking the “Visible” checkbox. Advanced settings are available for some fields, such as the field can be selected to be displayed in the center treeview of a record.

Reports



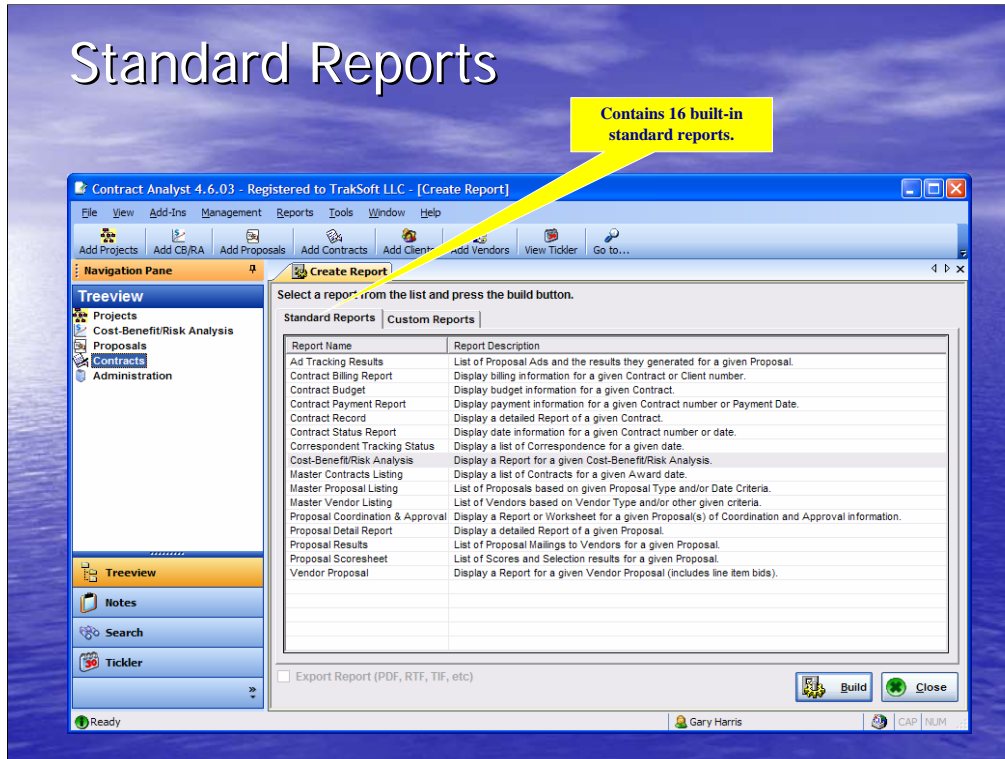
- Standard Reports
- Built-In Ad-Hoc Report Builder
- Report Wizard
- Exporting Reports



Contract Analyst has some very powerful reporting capabilities built in. It includes several standard “canned” reports, a built-in ad-hoc report writer, a Report Wizard for creating reports, and has the capability to export standard and user-built reports to a file.

Standard Reports

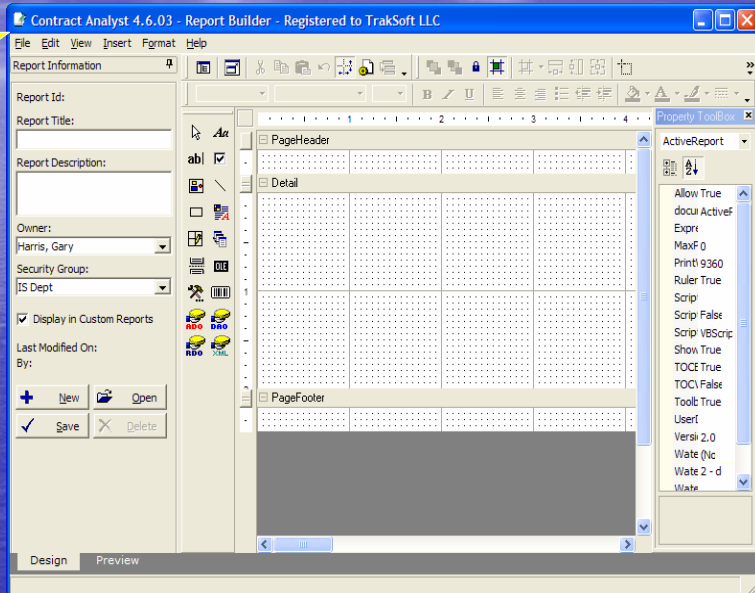
Contains 16 built-in standard reports.



Contract Analyst comes with 16 standard “canned” reports built in and are ready to go. We understand that with the diverse group of users that will need reports from Contract Analyst, we could not meet everyone’s reporting needs. So we added an Ad-Hoc Report Writer to Contract Analyst.

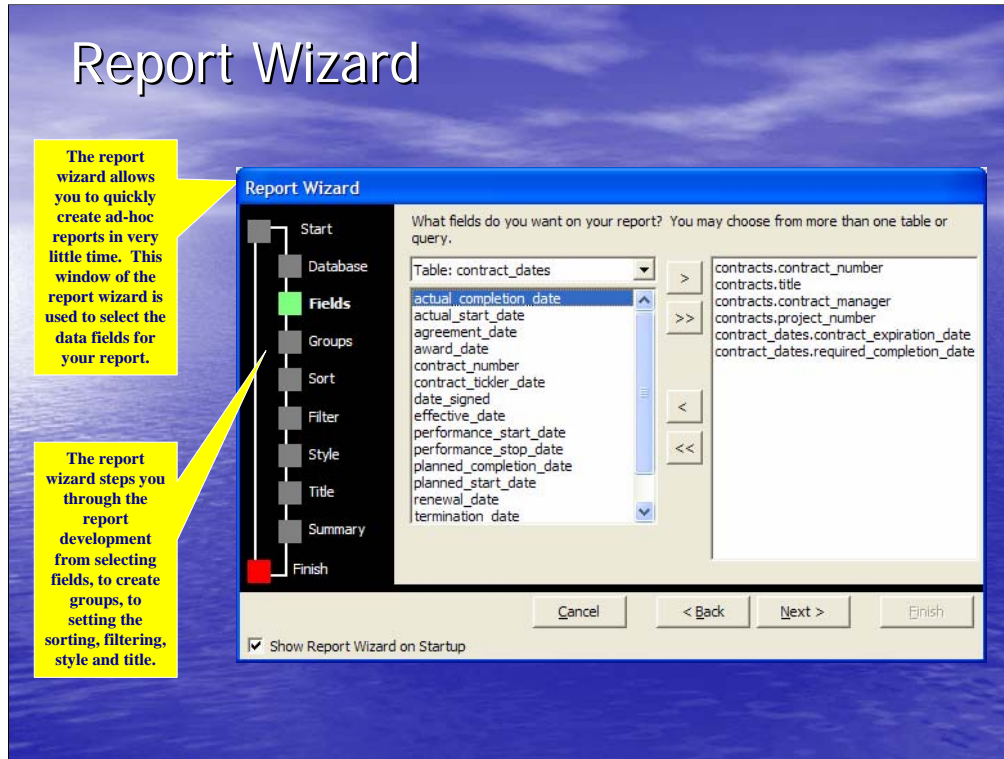
Built-In Ad-Hoc Report Builder

When standard reports are not enough, build, create, run, and save your own reports using the built-in Ad Hoc Report Builder.



The built-in Ad-Hoc Report Builder allows users to create reports on any data that is stored in the database. You can create powerful reports from one or more tables that contains summation of columns, grand totals, and sub-reports. Other capabilities include adding graphics such as a logo, creating business letters and merging them with the addresses in your database, and much more. The security features in Contract Analyst will limit the data in the reports to only those who have access to it. All custom reports can be saved to your database so you can run them at any time in the future.

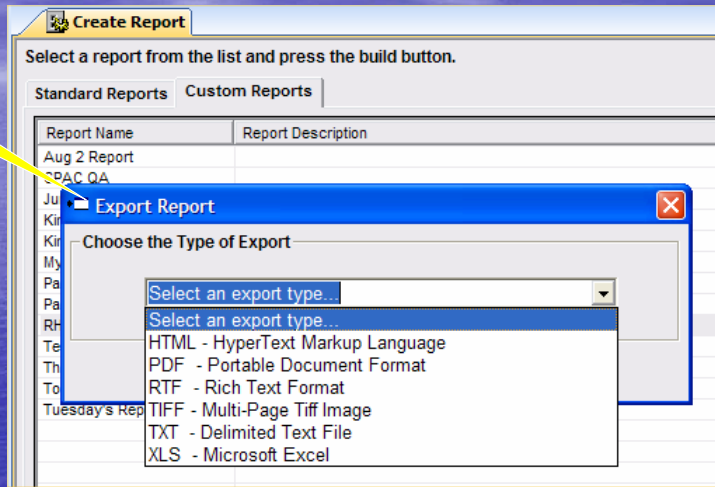
Report Wizard



When you launch the Report Builder, the first thing that comes up is the Report Wizard. The Report Wizard will step you through the initial creation of the report. You will select the tables and fields used in the report, set the grouping, sorting, and filtering properties, select the report style, and give the report a title. When the report wizard is completed, the initial foundation of the report will be created in the Report Builder. You can then go in and move around and align columns and fields, change the font, and add a logo. When setting the filtering properties, you can select the filtering to have the user select the filter on-the-fly when the report is run.

Exporting Reports

Export your reports to a variety of digital formats for e-mailing and storage.



All reports, standard and user-created, can be exported to a variety of formats, allowing you to store them on a hard drive or e-mail them. The formats include an HTML Web Page, Adobe PDF, Rich Text Format, which can be opened up in Microsoft Word, a TIFF graphic file, plain text file, and as an excel spreadsheet.

Search Engine

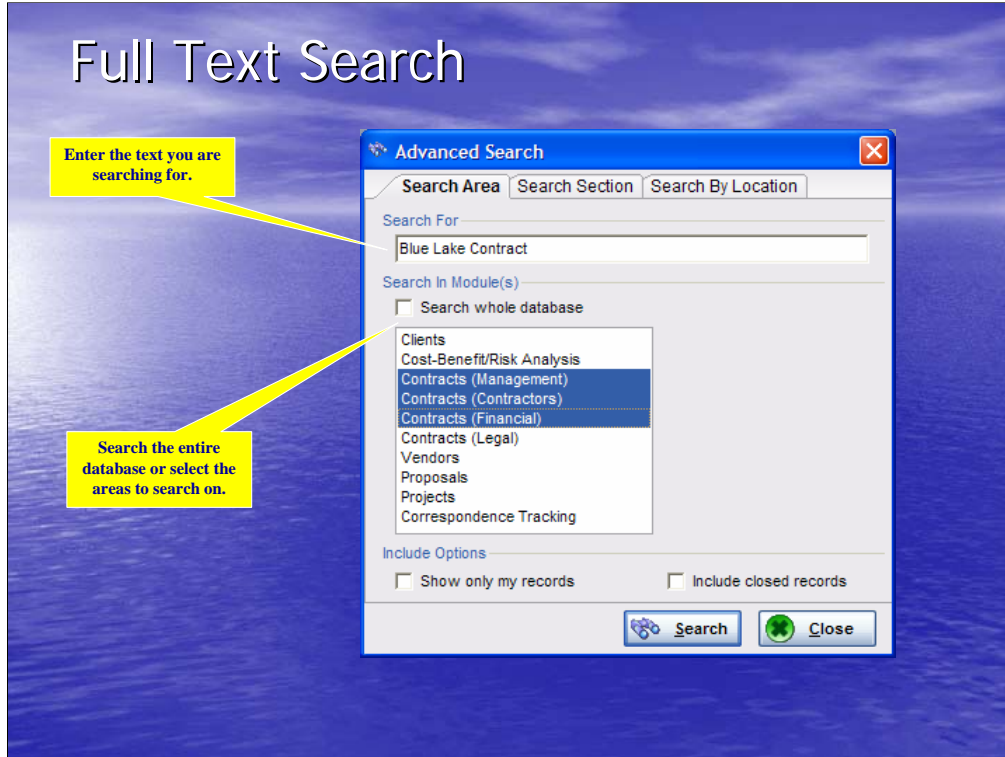


- Full text search entire database
- Drill down to field-level search
- Search by location



Contract Analyst has a powerful Search Engine built in to the system. It allows for a full text search of the entire database. You can also drill down to the field level or search by location.

Full Text Search



To perform a full text search, simply type your search text in the “Search For” field, select “Search whole database” or select one or more areas within the database, and hit the search button. A list of the records that meet your search criteria will be displayed. You can double-click on a specific record in the search results list and be taken directly to that record. You have the option to only search the records where you are listed as the record owner and search records that have been closed.

Drill Down Search

The screenshot shows an 'Advanced Search' dialog box with the following fields and options:

- Search For:** A text input field containing 'Accounting'. A yellow callout box points to this field with the text 'Enter the text you are searching for.'
- Choose Section to Search:** A dropdown menu showing 'Clients Category'. A yellow callout box points to this dropdown with the text 'Select the area to search.'
- Search Table(s):** A dropdown menu showing 'Clients'. A yellow callout box points to this dropdown with the text 'Select the table to search.'
- Advanced Search Options (Optional):**
 - Search by: Client Type (dropdown menu)
 - In-House Client (dropdown menu)A yellow callout box points to the 'Client Type' dropdown with the text 'Select the field and data to search.'
- Include Options:**
 - Show only my records
 - Include closed records
- Buttons:** 'Search' and 'Close' buttons are located at the bottom right.

The drill-down search provides the capability to select the section, table, and specific field to search in. Simply type in the search text, select the area and table, and hit the search button. You can optionally select the field to search in as well. If the field is a drop-down list field, you can narrow the search by selecting the drop down item as shown in this example.

Location Search

Select the City, State, Zip Code, or Country to search.

Advanced Search

Search Area Search Section Search By Location

Location Search

City: Melbourne

State: FL

Zip:

Country:

Include Options

Show only my records Include closed records

Search Close

The Location Search allows you to search for records in specific locations. You can search by City, State, Zip Code, and/or Country.

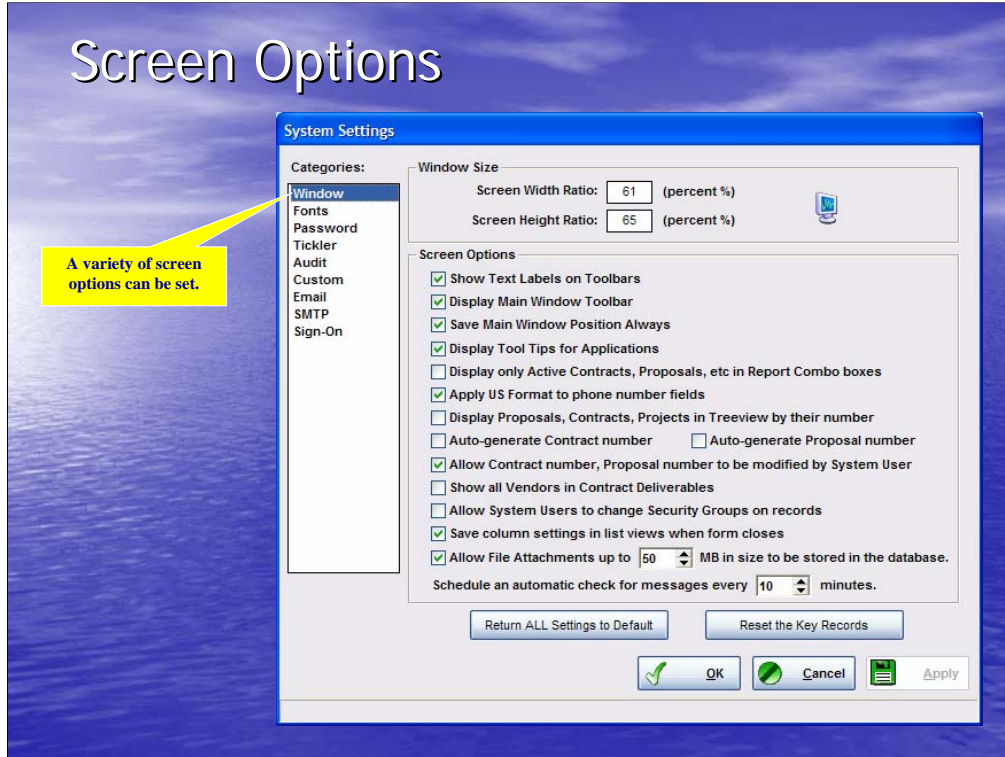
System Administration

- Screen Options
- Audit Trail Settings
- Screen Customization
- E-Mail Alert Settings
- Single Sign-On Settings
- Set Drop-Down List Items



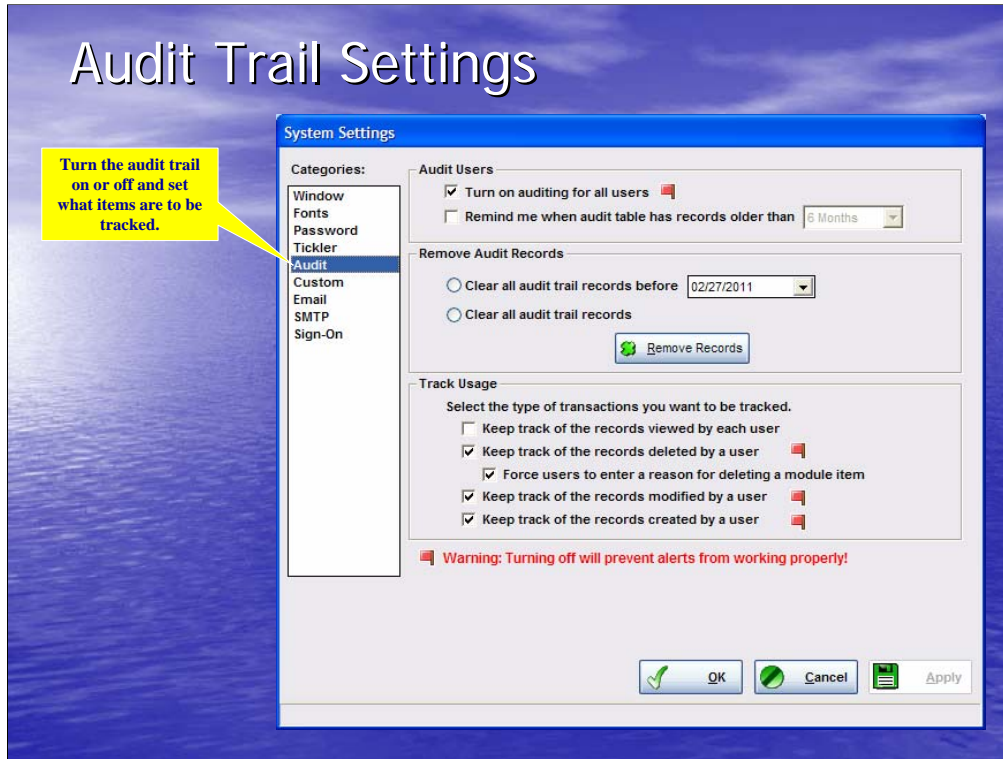
Contract Analyst has some very powerful System Administration features. We will highlight some of the common System Administration capabilities such as setting screen options and audit trail settings. We will cover some additional screen customization features and important e-mail alert settings. We will show you how to turn on the single sign-on feature and how to make changes to the drop-down list fields.

Screen Options



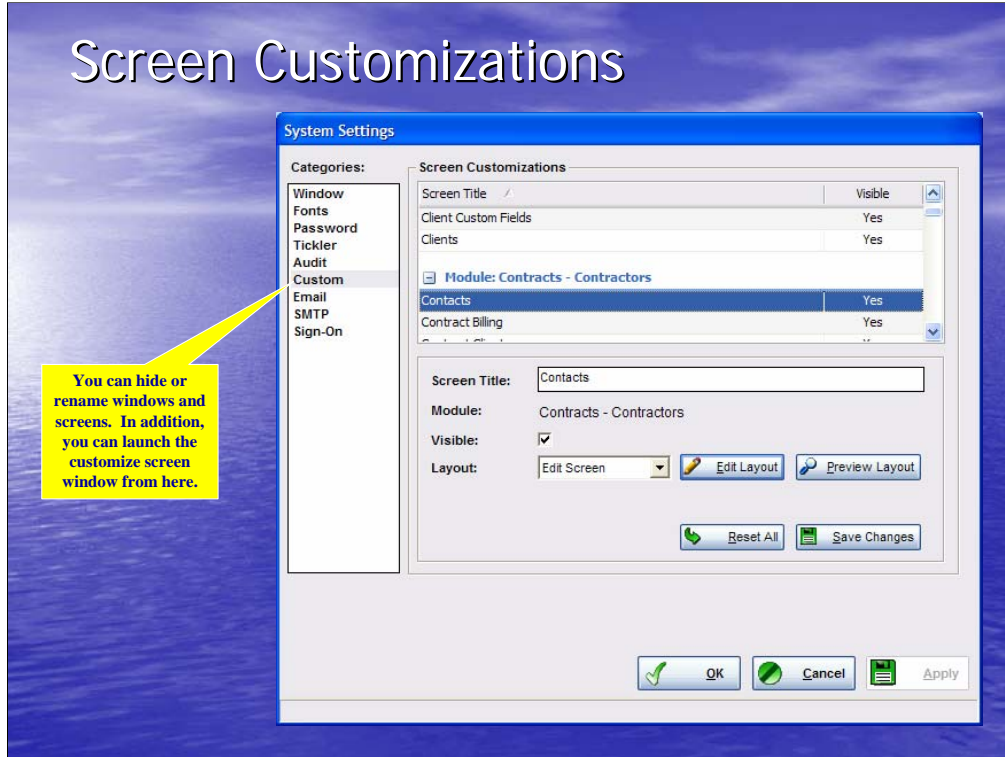
One powerful tool System Administrators have is the System Settings Window. This window is divided into 9 categories. The Window Category, which is currently displayed, is where you can set some very important screen options, such as setting the phone number format used in the system and modifying window display options. You can select to have the system automatically generate contract and proposal numbers, or manually enter them in if your organization has a specific format for these items. From this window you can allow attachments to be stored directly in the database and set their size limit. There are several other items that can be set from this screen.

Audit Trail Settings



The Audit Category allows the System Administrator to turn on or off the audit trail in Contract Analyst. In addition you can select the items to be tracked and remove old records no longer needed.

Screen Customizations



The Screen Customizations Category provides additional user customization capabilities within Contract Analyst. This screen allows you to rename a screen or window, or completely hide them if they are not needed. You can also launch the Edit Screen Window from here to make changes to an individual screen or window.

E-Mail Alert Settings

Setup the account that will be used to send e-mail alerts.

System Settings

Categories:

- Window
- Fonts
- Password
- Tickler
- Audit
- Custom
- Email
- SMTP
- Sign-On

SMTP Settings

Outgoing Mail Server (SMTP): smtp-server.com

Incoming Mail Server (POP3):

Account Address: NoReply@ContractAnalyst.com

Send copy of email to Account Address

Use Authentication

User Name: NR

Account Password: *****

Outgoing Server Port: 25 [default 25]

Email Priority: HIGH_PRIORITY

Connection Timeout: 15 (15 seconds)

Connection Attempts: 3 (3 attempts)

Message Timeout: 45 (45 seconds)

- Indicates a mandatory field for basic SMTP email.

Test Settings

OK Cancel Apply

System Administrators can set important E-Mail Alert settings on the SMTP Category. This screen is where you would set up the e-mail account that will be used to send e-mail alerts. This account information is usually obtained from your organization's e-mail administrator. You can also test those settings from this screen to ensure they are correct.

Single Sign-On Settings

Setup Single Sign-On settings to provide user authentication without using a login window.

The screenshot shows the 'System Settings' dialog box with the 'Single Sign-On' category selected in the left-hand 'Categories' list. The 'Single Sign-On' section is active and contains the following settings:

- Authenticate using LDAP or WinNT**
 - LDAP Authentication
 - WinNT Authentication
- Host Name:** SEAWASP
The computer name or IP address of the machine performing the authentication check.
- Domain Name:** SEAWASP
The domain if using Directory Services or computer name if using local authentication.
- Use Integrated Security**
 - Bind User Name:** [Empty field]
Enter a user name to login in with if the service does not allow anonymous searches.
 - Bind Password:** [Empty field]
 Mask the Password
- Automatic logon with current user name and password**

Buttons at the bottom: OK, Cancel, Apply, and a 'Test Settings' button.

This screen provides the capability to turn on the single sign-on feature within Contract Analyst during installation. When turned on, Contract Analyst can automatically authenticate a user without the use of a login window.

Drop-Down List Items

The Lookup Items Window allows you to add, edit, and delete items in drop down list fields.

Sample Drop Down List Field. Notice the items in the list are available in the Lookup Items Window.

Lookup Items

Select a Lookup Type to Add/View records...

Lookup Type: Contract Types

Lookup Item Name:

Lookup Item Name

- 3rd Party Access
- Comodity Purchase
- Midsource
- Services Agreement
- Vendor Contract

New Save Delete Close

Demographic Area: Washington North

Contract Type: Comodity Purchase

Contract Category:

- 3rd Party Access
- Comodity Purchase
- Midsource
- Services Agreement
- Vendor Contract

Total Payments:

Throughout Contract Analyst there are several drop-down list fields that allow users to make a selection from a list rather than manually entering in the data. This ensures data consistency and data integrity in the system. System Administrators can easily add, change, or delete items in these lists to tailor the system to the needs of the organization. This capability, along with the user customization features, makes Contract Analyst extremely powerful and flexible. Organizations will be able to customize Contract Analyst to easily fit in with the organization processes and procedures, rather than an organization having to change processes to use the system.

System Security

- Security Groups
- User Security
- Record Security



 Contract
Analyst

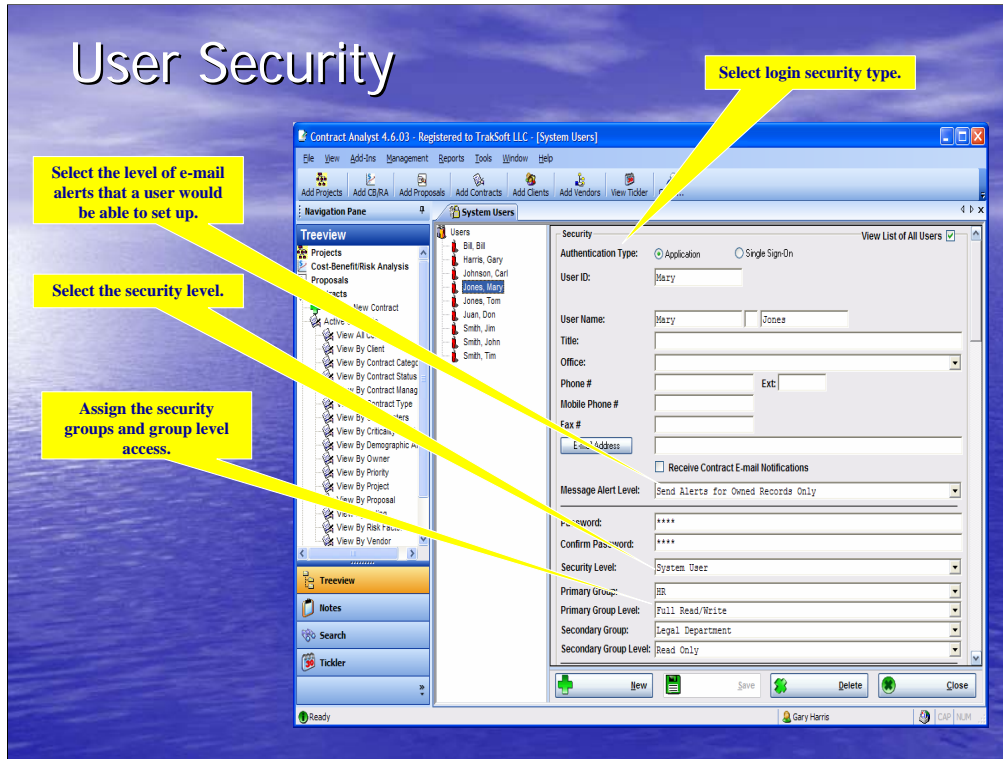
The security features built into Contract Analyst are very robust and easy to use. By setting up security groups and assigning users and records to the proper security group, only those individuals will have access to the records they are authorized to access.

Security Groups

Create security groups to restrict access to specific modules and the records within those modules.

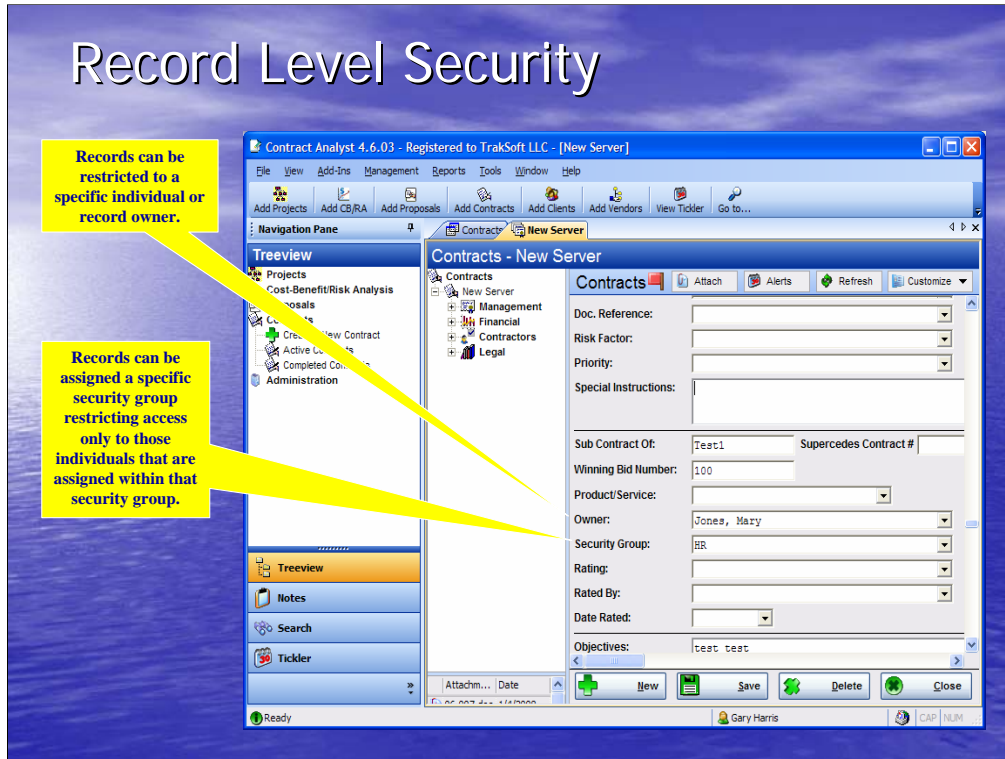
Group Name	Clients	Contracts	Corres. Track	CB/RA	Projects	Proposals	Vendors	Reports
Standard	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
IS Dept	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes
Legal Department	No	Yes	No	No	Yes	No	No	Yes
HR	Yes	Yes	No	No	No	Yes	Yes	Yes

Security groups provide the capability to assign accesses and levels of access to different units within an organization. For example, you can create a group for the accounting department and a group for the research department, and then assign users to their appropriate groups. Users in one group would not have access to the records in another group. This provides for keeping all your records in a single repository database, but functionally separated by units within an organization.



When adding new users to Contract Analyst, the System Administrator would assign the security group and level of access to that security group for each user. The level of access can include “full read and write” access to all records within the security group to “read only” access to those records. The level of access can also be restricted to only the records the user is assigned as the owner of the record. Each user is assigned a security level, such as System Administrator or System User, which designates the overall access to the system. In addition, the authentication type and the level of e-mail alerts that a user can send can be assigned.

Record Level Security



When a record is created in Contract Analyst, the record owner and security group is automatically assigned. The record owner would initially be the person that creates the record, and the security group assigned would initially be the primary security group of that user. The owner and security group can be changed at a later time. Depending on the level of security that users are assigned, the record can be restricted to the owner of the record only or to any user in the assigned security group.

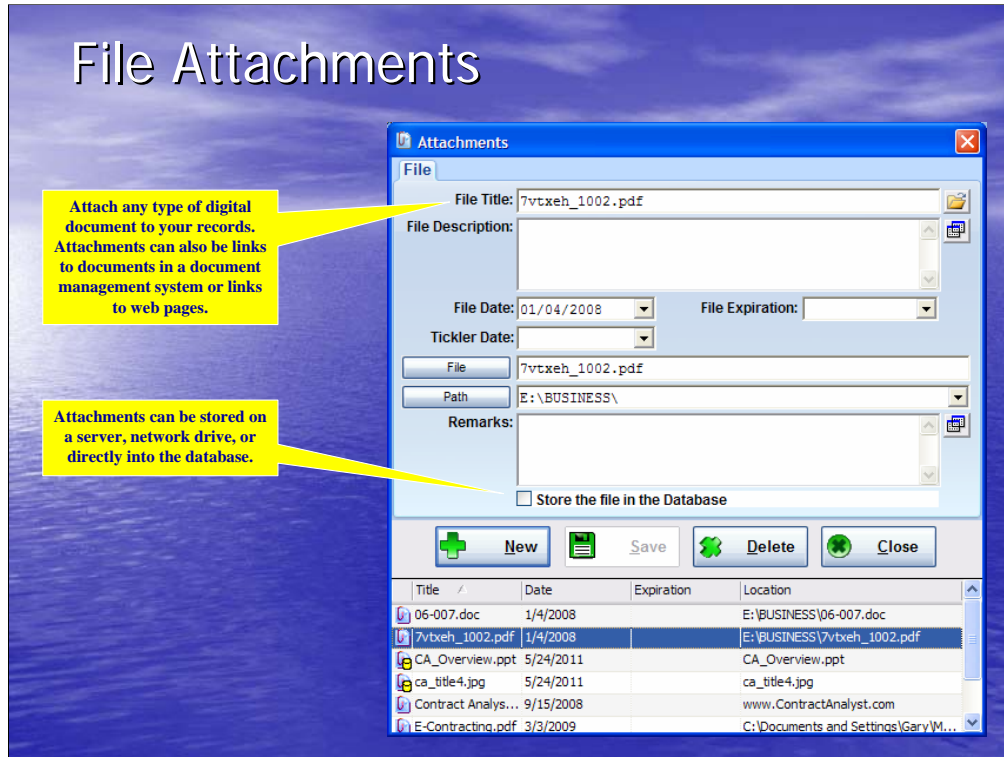
Additional Features

- File Attachments
- Audit Trail
- eBids Electronic Bidding Module
- Data Import and Export



As we conclude this presentation, we will cover a few additional features of Contract Analyst. These features include attaching files to records, the built-in audit trail, the eBids electronic bidding module, and importing and exporting data.

File Attachments



Attaching files to records within Contract Analyst is extremely simple. At the top right of the record screen is an “Attach” button, which launches the Attachments Window. You simply browse to the file you want to attach and select it. Another method is to drag and drop the file from Windows Explorer or the URL icon from the internet browser window onto the Attachments Window. This will automatically bring the record data into the Attachments Window for you. Once selected, you can add additional information such as the file description or remarks to the attachment record. In addition, you can choose to store the attachment directly into the database, or keep it stored on a network drive. This window also provides the ability to attach links to documents that are stored in a document management system or links to web pages on the Internet, such as an on-line product list for a vendor.

Audit Trail

Search audit records based on date, table, and/or transaction.

Audit records will tell you "who" did "what" to "which" record and "when".

The screenshot shows the 'Audit Information' window in Contract Analyst 4.6.03. The window title is 'Contract Analyst 4.6.03 - Registered to TrakSoft LLC - [Audit Information]'. The interface includes a menu bar (File, View, Add-Ins, Management, Reports, Tools, Window, Help), a toolbar, and a 'Navigation Pane' on the left with a 'Treeview' showing various contract-related views. The main area is titled 'Audit Information' and contains a search section with the following fields:

- Show transactions based on given query results...
- Date Started: [05/01/2011] Date Ended: [08/27/2011]
- Table: [Any Table]
- Transaction: [Any Transaction]

Below the search fields is a table of audit records with the following columns: Date, User ID, Table Name, Transaction, Machine Name, Application Source, Key Accessed, and Message.

Date	User ID	Table Name	Transaction	Machine Name	Application Source	Key Accessed	Message
5/16/2011 11:44:17 AM	Gary	attached_files	Insert	SEAWASP	ContractAnalyst	rec_no=107	
5/16/2011 11:50:28 AM	Gary	alerts_sent	Delete	SEAWASP	ContractAnalyst		
5/16/2011 2:20:06 PM	Gary	contract_budget	Update	SEAWASP	ContractAnalyst	line_number=1	
5/16/2011 2:20:53 PM	Gary	amendments	Update	SEAWASP	ContractAnalyst	amendment_number=5	
5/24/2011 7:35:29 AM	Gary	attached_files	Insert	SEAWASP	ContractAnalyst	rec_no=108	
5/24/2011 7:36:13 AM	Gary	attached_files	Insert	SEAWASP	ContractAnalyst	rec_no=109	
5/30/2011 10:03:34 AM	EmailNotify	alerts_queue	Delete	CUDA	ContractAnalystMail	queue_id=1	
5/30/2011 10:03:34 AM	EmailNotify	alerts_queue	Delete	CUDA	ContractAnalystMail	queue_id=2	
5/30/2011 10:03:34 AM	EmailNotify	alerts_queue	Delete	CUDA	ContractAnalystMail	queue_id=3	
7/1/2011 11:53:10 AM	Gary	contracts	Insert	SEAWASP	ContractAnalyst	contract_number=Test 15 New	
8/27/2011 9:10:52 AM	Gary	accounts	Update	SEAWASP	ContractAnalyst	account_number=1A	
8/27/2011 9:12:06 AM	Gary	accounts	Update	SEAWASP	ContractAnalyst	account_number=2	
8/27/2011 9:12:13 AM	Gary	accounts	Update	SEAWASP	ContractAnalyst	account_number=1A	

At the bottom of the window, there are 'Search' and 'Close' buttons. The status bar at the bottom shows 'Ready' and the user 'Gary Harris'.

Contract Analyst has a built-in Audit Trail. It will track who has accessed specific records, when the records were accessed, which records were accessed, and what was done to the record, such as inserting a new record, updating an existing record, or deleting a record. The Audit Trail also maintains a history of e-mail alert activity.

eBids – Electronic Bidding Module

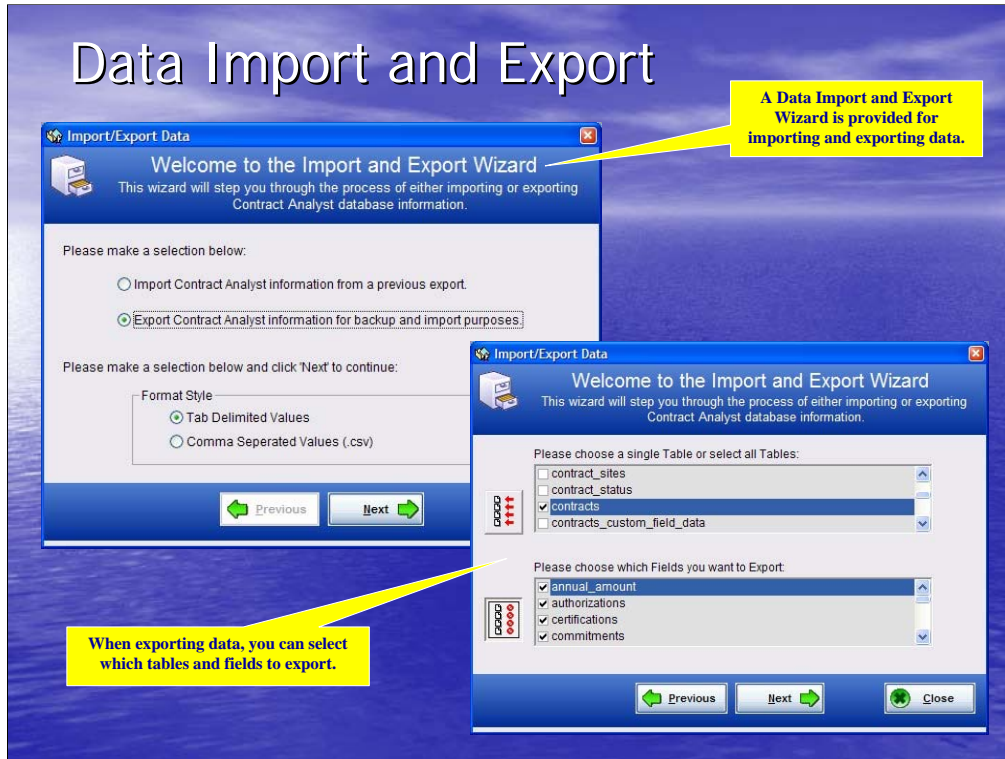
The screenshot shows the 'eBids for Contract Analyst' application window. The title bar includes 'File', 'Tasks', and 'Help'. The main area is titled 'Start a Task' and contains a flowchart of tasks: 'Start New Bid', 'Import Request', 'Continue Bid', 'Review Request', 'Enter Vendor Info', 'Enter Bid Info', and 'View Summary'. A blue arrow traces the path from 'Start New Bid' to 'Continue Bid', then to 'Review Request', 'Enter Vendor Info', 'Enter Bid Info', and finally 'View Summary'. A yellow callout box on the left explains that eBids is a stand-alone program for creating and exporting electronic requests, and that vendors use it to create proposals. Another yellow callout at the bottom explains that eBids automates the process of creating an electronic proposal for vendors.

eBids is a stand-alone electronic bidding program. Contract Analyst users can create and export an electronic RFP, RFQ, or other request. Vendors interested in bidding on the project can download the e-request and eBids, create an electronic proposal, and send it to the organization for import into Contract Analyst, eliminating manual entry.

eBids will walk Vendors through the process of creating an electronic proposal.

Contract Analyst comes with a standalone program called “eBids”. eBids provides the capability for an organization to engage in electronic bidding. The electronic bidding starts by creating an electronic Request For Proposal (RFP), Request For Quote (RFQ), Request For Information (RFI), or any other similar instrument. Once the electronic request is created, it can be posted on the organization website along with a copy of eBids. Any vendor interested in bidding on the project can then download the electronic request and a copy of eBids. The vendor would then install eBids on a PC and import the electronic request. The vendor would analyze the request and construct their proposal to bid on the project within eBids. After constructing the proposal, the vendor would export the proposal to an encrypted file and then e-mail it or upload it to the website of the organization who issued the electronic request. All the submitted proposals could then be imported into the Proposals Module in Contract Analyst without having to manually enter them in. The proposals can then be scored by the scoring team and the best vendor selected to award the contract to. Once selected, the proposal information and winning vendor information can be ported to the Contracts Module for the management process.

Data Import and Export



Data can be imported into and exported out of Contract Analyst. An Import/Export Data Wizard is provided for this purpose. When exporting data, it can be exported as a Tab Delimited Value file or a Comma Separated Value file, which can be opened up in an excel spreadsheet. You can also select the tables and fields to export.

Versions, Licensing, and Pricing

- Two Versions Available
 - Single User Desktop Version
 - Unlimited User Enterprise Version
 - Site License for Unlimited Users
 - NOT licensed “per user”
- Realistic and Competitive Pricing
 - No Hidden Costs
 - Pricing Posted on Our Web Site



Contract Analyst is available in two versions: A Single-User Desktop Version that comes with its own desktop database, and an Unlimited User Enterprise Version that would utilize your organization’s enterprise database server and can be made accessible through the Internet or an Intranet by using several virtualization technologies available on the market. The Enterprise Version comes with a site license for unlimited users. Unlike our competitors, we do not price our product by the number of users. You will find that our pricing is realistic and very competitive. There are no hidden costs. And again, unlike most of our competitors, we post the pricing on our web site. You have to ask yourself, “Why don’t our competitors post their pricing on their website?” The answer is usually that they have something to hide and don’t want to scare potential buyers away by the price.

Database Servers Supported

- 5 Enterprise Database Servers Supported
 - MS SQL Server 6.5 or higher.
 - Sybase ASE 10.0 or higher.
 - Oracle 7 or higher.
 - PostgreSQL 8.2 or higher.
 - MySQL 4.1 or higher.
- OleDB and ODBC Connections



The Enterprise Version of Contract Analyst supports five different enterprise database servers. These include SQL Server, Sybase, Oracle, PostgreSQL, and MySQL. Additionally, if your organization uses a different database server, OleDB and ODBC connections are available.

Product Support

- Full Year of Product Support Provided with Purchase
- “Optional” Renewal After First Year of Support Expires
- Support Provided by the Developers and Not Untrained Helpdesk Personnel
- Installation Support – Implementation Plan



Contract Analyst comes with one full year of product support when purchased. After the year of support is up, organizations have the “option” to purchase additional yearly support at a very competitive price. Product Support for Contract Analyst is un-matched. It is provided by the developers themselves and not untrained helpdesk personnel following checklists. In addition, we provide a generic implementation plan with your purchase that will guide you through the implementation of Contract Analyst, from installation in a testing and training environment to moving to a production environment.

Thank You for Your Interest!



- More Information: www.ContractAnalyst.com
- Download Free Trial: www.ContractAnalyst.com/download.php
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- Request Live Demo: www.ContractAnalyst.com/demo.php
- Contact Us: www.ContractAnalyst.com/contact.php



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This concludes this presentation of Contract Analyst. We want to thank you for your interest. We invite you to visit our web site for additional information, download a free 30-day trial version, view the pricing schedule, or request a live on-line demonstration with one of our staff or distributors. The users manual with screenshots is also available on our download page. Please feel free to contact us if you have any questions.