SharePoint Contract Management

Iowa Department of Public Health
May 19 & 20, 2010
Agenda

- Service Contract Quality Improvement
- SharePoint System Overview
  - System Requirements
  - MOU and Authorized Roles
- Implementation Plan
- SharePoint Contractor Site Demo
  - Site Tour
  - Uploading documents
  - Check out/Modify/Check In process
  - Electronic Expenditure Workbook Workflows
  - Other SharePoint features
- Questions
Service Contract Quality Improvement

- Implementation of electronic processes that will eliminate barriers, processing delays and increase timeliness for competitive selection application and service contracting.
  - Electronic submission of proposals for IDPH funding
  - Electronic filing of award notifications and proposed service contracts for each applicant
  - Electronic execution of service contracts
  - Electronic service contract management
What is SharePoint?

- Document library
- Web-based
- Collaborative tool
- Secure
- Document history
- Archive
System Requirements

- Internet access
- Operating system; Windows XP or newer
- Software Applications:
  - Microsoft Internet Explorer 6.0 or newer
  - Microsoft Office 2000 or newer (including Excel)
  - Adobe Acrobat reader 8.0 or newer

Users must be able to add a Trusted Site to Internet Explorer to be able to install Active-X controls
Beginning July 1, 2010 IDPH will utilize SharePoint for contract management for the following contracts:

- Contracts awarded following competitive selection process
- Contracts required by Iowa Code or Administrative Code for multiple contractors (i.e. LPHS, Childhood Lead, Abandoned Wells)
- Contracts required by Federal grants for multiple contractors (i.e. Breast & Cervical Cancer)
SharePoint User MOU

- Memorandum of Understanding (MOU)
- Contract Administrators
  - Persons authorized to obligate agency and execute legal, contract and financial documents
  - Authorized to add, modify and delete documents
- Contract Users
  - Persons authorized to view agency documents
Contractor Sites

- Each contractor has a unique contractor site in SharePoint
- Ensures confidentiality and integrity of documents
- Contains all contract documents, business organization components, electronic expenditure workbooks and disbursement notices.
SharePoint Contractor Site Protocol Demo
Additional Training Opportunities

- Training information, including instructions for registering for regional workshops, has been added to the IDPH Modernization webpage under the QI tab. [http://www.idph.state.ia.us/mphi/quality_improvement.asp](http://www.idph.state.ia.us/mphi/quality_improvement.asp)

- Regional Computer Lab Sessions
  - Hawkeye Community College – May 25th
  - Southwestern Community College – May 25th
  - Kirkwood Community College – May 26th
  - Western Iowa Technical Community College – May 26th
  - Indian Hills Community College – May 27th
  - North Iowa Area Community College – June 2nd
  - Des Moines Area Community College – June 2nd
  - Iowa Lakes Community College – June 8th
  - Des Moines Area Community College – June 8th
  - Iowa Western Community College – June 9th
Questions