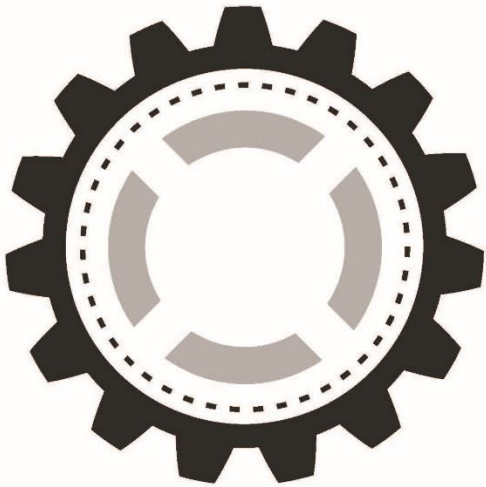




AJ3 Solutions

Municipal Contract Management

Vendor User Guide

Thank you for contracting with Albany County. It is our mission to provide strategic and responsive public services that are fiscally responsible and sensitive to the diverse and changing needs of our community.

To that end, the County has transitioned to an electronic contract process. We hope that this manual is helpful to you in making that transition with us.

If you have any questions or issues regarding the electronic contract software, please contact AJ3 Solutions:

support@aj3solutions.com or (585) 213-2800



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I. Welcome to Mycontract

Upon your Albany County contact setting up your account in the electronic contract management system, you will receive a welcome email.

The email will come from Noreply@albany.mycontract.com

To: Arthur James <arthur.james@aj3solutions.com>

Subject: noreply@albany.mycontract.com

This is an automated email from Albany County's
Contract Management System (<http://albany.mycontract.com>).
DO NOT REPLY TO THIS EMAIL.

Your login details have been created. You can login with the
following username and password:

username: arthur.james@aj3solutions.com

password:

To login, visit this url: <https://albany.mycontract.com>

The Chrome web browser is the preferred browser for this application. In order to view PDFs on the site you will need to allow popups.

Once you login, you can change your password on the My Account tab. This is recommended.

For assistance please first refer to the vendor manual by clicking on the "Help" button once you log-in. If your answer cannot be found there, please contact your County liaison.

This is an automated email from Albany County's
Contract Management System (<http://albany.mycontract.com>).
DO NOT REPLY TO THIS EMAIL.

NOTE - If you have not received a welcome email, please contact your Albany County liaison or AJ3 Solutions.



II. Log-in/Log Off

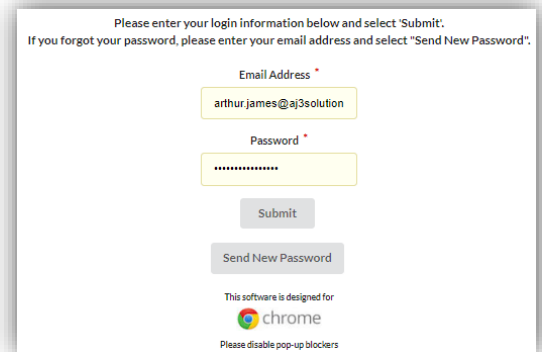
The electronic contract management software is optimized for use with Google Chrome, though it will work with other web browsers also.

A. How do I Log -in

Please go to <http://albany.mycontract.com>
or click the link in the welcome email.

Once at the Contract Management website, please use the username and temporary password that was included in the Welcome Email.

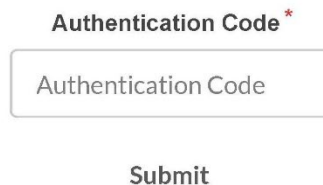
After clicking submit, you will be asked to change your password.

A screenshot of a login form. At the top, it says "Please enter your login information below and select 'Submit'." and "If you forgot your password, please enter your email address and select 'Send New Password'." Below this are two input fields: "Email Address *" with the value "arthur.james@aj3solution" and "Password *" with masked characters. There are two buttons: "Submit" and "Send New Password". At the bottom, it says "This software is designed for" followed by the Chrome logo and "Please disable pop-up blockers".

Please enter the authentication code sent to your email and click 'Submit'.

B. Multi Factor Authentication

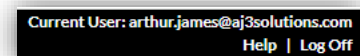
After submitting your password, you will be sent an authentication code to your email. Copy and paste it into the Authentication Code box in the Contract Management Software

A screenshot of a Multi Factor Authentication form. It has a label "Authentication Code *" above a text input field containing "Authentication Code". Below the input field is a "Submit" button.

C. How do I Log Out of the Contract Software

In the upper right corner of your browser window, the software indicates the current user name, a "Help" button and a "Log Off" button.

Click on Log Off to sign out of the Contract Management System.

A screenshot of a user status bar. It shows "Current User: arthur.james@aj3solutions.com" and two buttons: "Help" and "Log Off".

III. Dashboard

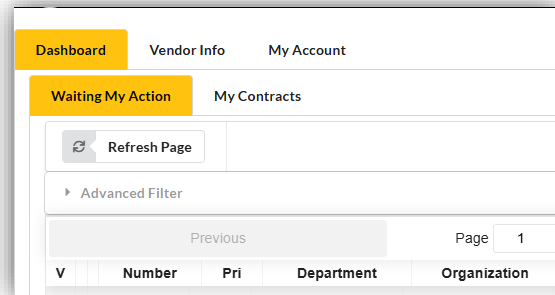
The Dashboard tab is your general/home tab. When selected, two options are available below:

A. Contracts Waiting My Action:

When the “Waiting My Action” tab is selected, you will find, in the rows below, any contract that is waiting on your approval/signature.

Tip: If you believe that a contract should be waiting on your approval/signature, and you do not see it here, please confirm that you are logged in under the proper user expecting the approval/signature action.

Tip: To open a contract, double click on the pencil icon underneath the “V.”



Refresh: Refreshes the page

Export: exports list with data (does not act on search filtering)

Search: Allows filtering of a search

Advanced Filters: uses AND/OR conditional statements to provide a more in-depth search

Run Query: runs the advanced search once the conditions are all set

Clear Query: resets the Advanced Filter to remove any conditions

Columns:

V = **DOUBLE CLICK** the pencil to edit the document if you are allowed

D = Deletes the contract (if allowed)

Number = Auto assigned Contract Number

Pri = Priority

Department = Department initiating the contract

Organization = Name of the Vendor

Name = Contract name (often a summary of what the contract is for)

Start Date = Date the contract is to start

End Date = Date Contract expires

Status = Is the status of the contract in the workflow process

Date Executed = is the date the contract was finalized

Waiting on = What the contract needs to proceed through the process



B. How do I see My Contracts:

You will see all contracts in the system that relate to you.

All: Shows all Contracts that you are allowed to see regardless of the status

Draft: Shows all Contracts that you are allowed to see with the status of Draft

Executed: Shows all contracts that have a status of Executed

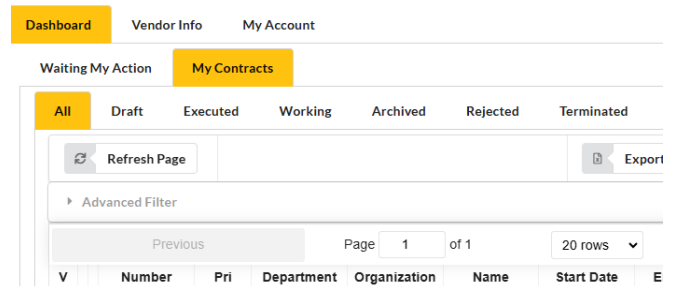
Working: Shows all contracts that have a status of Working/in Process

Archived: Shows all contracts that have a status of Archived

Rejected: Shows all contracts that have a status of Rejected

Terminated: Shows all contracts that have a status of Terminated

* All, Executed and Working tabs have additional columns:

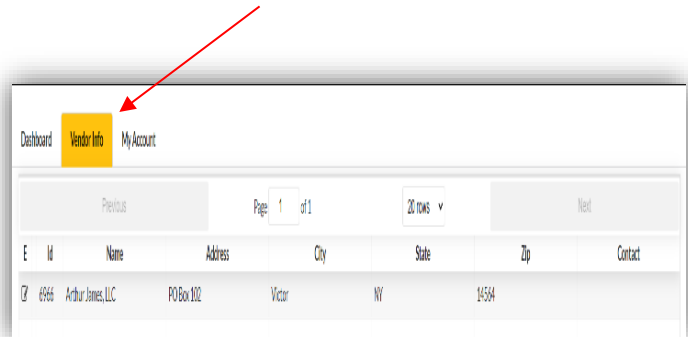


Dashboard	Vendor Info	My Account
Waiting My Action	My Contracts	
All	Draft	Executed
Working	Archived	Rejected
Terminated		
Refresh Page		
Export		
Advanced Filter		
Previous		
Page 1 of 1		
20 rows		
V	Number	Pri
Department	Organization	Name
Start Date	E	



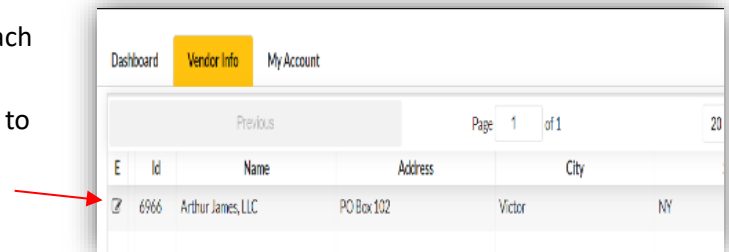
IV. Update Your Vendor Information

The Contract Management software allows you to store documents that you wish to use multiple times on multiple contracts or over the years in a repository. When you log in to the system, click the **Vendor Info** tab to manage your account.



A. How do I Access my Vendor information

You will see a list of all the vendors you are related to in the system and can manage each of them individually. **Double click** the edit button to open the vendor profile you wish to view/edit.



B. How do I update my company information

To update your general company information, select the “Main” tab. Fill out the fields/boxes as required.

A screenshot of the software interface showing the 'Main' tab selected. A red arrow points to the 'Main' tab. The form contains the following fields: Federal ID/SSN, Vendor Number, Vendor Common Name (with a red asterisk), Vendor Legal Name (with a red asterisk), Address (with a red asterisk), Address 2, City (with a red asterisk), State (dropdown menu showing NY), Zip (with a red asterisk), Phone, and Fax. The 'Vendor Common Name' field contains 'AJ3 Solutions, LLC'. The 'Vendor Legal Name' field contains 'AJ3 Solutions, LLC'. The 'Address' field contains 'Po Box 102'. The 'City' field contains 'Victor'. The 'State' dropdown menu shows 'NY'. The 'Zip' field contains '14564'. The 'Phone' field contains '(585)213-2800'. There is a green 'Close' button at the bottom right.

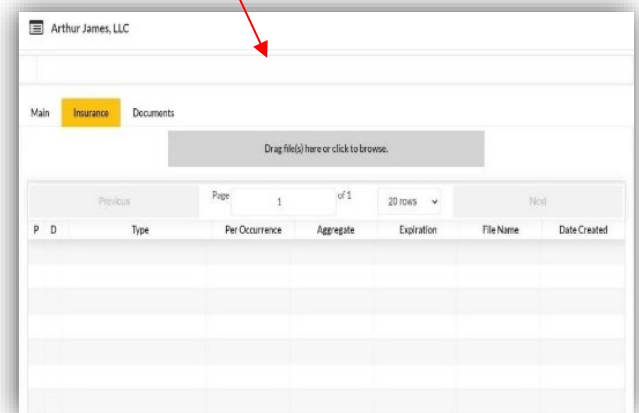
C. How do I add insurance

Under the **Insurance** tab, you can upload your required insurance documents.

Please make sure to properly fill in the blanks once the insurance is uploaded (i.e. type of insurance, peroccurrence amount, if applicable and most importantly, the expiration date).

Tip It is important that you properly identify the type of insurance, policy amounts and expiration date. If you do not, the software may think the old insurance has not been replaced and continue sending you reminder emails.

Tip – There is no “save” button. When you upload the insurance, it should automatically save.



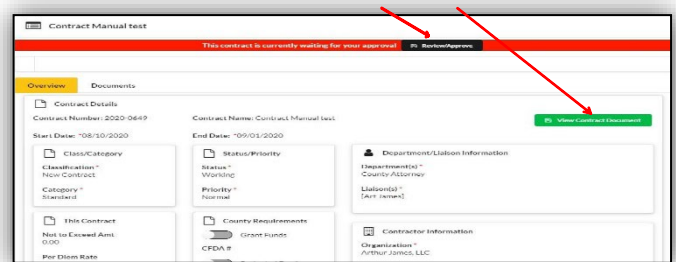
V. Contract Process

You will be notified via email of any contracts that are awaiting your approval/signature.

You can login to the system anytime and go to the My Contracts tab to see the status of a contract.

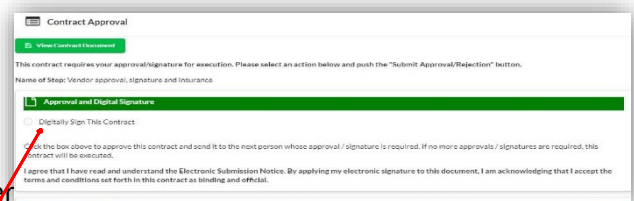
A. How do I View a Contract

1. Select the “Dashboard” tab
2. Select “My Contracts” tab
3. DOUBLE click on pencil icon underneath the “V”
4. Click green **View Contract Document** button
- 5.
6. and review. To approve or reject the contract click on the **Review/Approve** icon. Also, you can click on the green block for “View Contract Document”



B. Reviewing/signing the Contract

1. Select “Dashboard” tab
2. Select “Waiting my Action” tab
3. DOUBLE click on the pencil icon under
4. Click on the black “Review/Approve” button in the red banner across the top of your screen.
5. Click on the radio button underneath the green banner and next to where it states “Digitally sign this Contract.”
6. Scroll down to the bottom of the page and click on the green “Submit Approval/Rejection”



C. How do I know if the contract is fully executed

Once the contract has been approved and executed by all parties in the contract workflow, you will receive an email notifying you that the contract has been fully executed.

DO NOT REPLY TO THIS EMAIL.

The following contract requires your approval / signature. You are receiving this email because you have been specified as the user responsible for completing this approval step. Please visit the "Waiting My Action" tab to approve or reject this contract.

Vendor: Arthur James, LLC
Contract: Contract Manual test
Department:
County Attorney

Start Date: 08/10/2020
End Date: 09/01/2020
Type: new

Name of approval step: Vendor approval, signature and insurance

Message / Additional Instructions:
- none -



