Ready Contracts System Administration Training

Overview

Ready Contracts System administration training covers a broad range of topics designed to equip participants with the skills and knowledge needed to manage, configure, and maintain the system. This will be a hands-on practical session where you will have plenty of time to work through exercises. This course is suited to Ready Contracts business administrators, or power users within the Procurement team.

Who You Are

Attendees will need to have:

- Knowledge of Ready Contracts
- Fundamental knowledge of computers

Learning Outcomes

1. Roles and Responsibilities - Understanding the duties of a system administrator
2. User Management, setting up and editing
3. Business Levels and Security - creating groups and setting up and editing access
4. Menu Security
5. Setting up and editing Custom Action widgets
6. Custom fields and drop downs, how to add/edit
7. Reminder and Email Templates e. training@gov.readytech.io w. readytech.io/training-program Ready Contracts System Administration Course Outline 1
8. Reporting Categories - setting up and editing
9. Pre-Contract & Contract Numbering setting up and editing
10. Introduction to Building workflow processes

Day 1	
Date:	Tuesday 4th March 2025
Time:	12:30pm – 3:30pm
Training Consultant:	Julie Ireland
12:30pm – 12:45pm	**Introduction and Overview** • Welcome & House Keeping • Session outline • Introduction to system Administration
12:45pm – 1:45pm	**User Management** • Adding a new user • Managing current and non-current users (Demo) • Default settings for user profiles • User Roles **The CONTRACTS Security Model** • What is a Business Level Hierarchy? • Applying the Business Level Hierarchy to your organisation • Configuring the Business Level Hierarchy • Ad-hoc security • Assigning Group Access to screens • Setting up Menu Security • Security Groups • Default Dashboards
1:45pm -2:00pm	**Break**
2:00pm – 3:15pm	**Foundation Data Setup** • Custom Field Names • Configuring drop down values • Create and manage Custom Forms • System Alerts - Viewing a System Alert • Custom Action Buttons **Reminder and Email Templates** • Reminder and Email Footers • Customising Configuration for Reminder Templates • The Reminder List screen • Global Updated of Reminder Recipients • Email Templates

12:15pm – 12:30pm	**Questions and Close**
Day 2	
Date:	Thursday 6^{th} March 2025
Time:	12:30pm – 3:30pm
Training Consultant:	Julie Ireland
12:30pm – 12:45pm	**Introduction and Overview** • Welcome & House Keeping • Session outline
12:45pm – 1:15pm	**Global Update and Milestone and Deliverable Templates** • Determine and configure requirements for contract date reminders • Milestone and Deliverable templates Exercise: Creating a Deliverable Template Exercise: Add a Deliverable to a Contract
1:15pm – 2:00pm	**Questionnaires** • Setting up Questionnaires **Conflict of Interest Declaration** • Setting up Conflict of Interest Questionnaires **System Settings/System Status** • An overview of key system settings and status screen • How to view/log-off users – system Status • Auditing **Pre-Contract and Contract Numbering** • Contract/Pre-contract number prefixes • Contract/Pre-contract Number suffixes • Locking options
2:00pm – 2:15pm	**Break**
2:15pm – 3:15pm	**Introduction to building Process Workflows** In this session you will work through a structured exercise to build a sample workflow process. This exercise will familiarise you with the following workflow functionality.

	• Process tasks and sub-processes • Creating approval workflows • Setting role-based task completion notifications • Preconditions and Completion Conditions • Creating hold points and mandatory tasks
3:15pm – 3:30pm	**Questions and close**