Service Contracts Tracking & Self Alerting System

Catholic Relief Services

Ali El Benni & Ahmed Shoukry
Overview

• The Problem?

• The solution

• Technical Challenges

• The Impact

• Lessons Learned

• Improve and Scale up?
Why Service Contract Tracking & Self Alerting System?

- Missing contracts expiration dates
- Difficult tracking of procurement cases
- Inaccurate reports on contracts status
- A lot of paper work
- Requesters in remote locations
The Solution

- Tracking Service contracts
- Self Alerting Stakeholders
- Automating processes
How it Works?

Data Entry

Zoho Reports Upload Tool

Database backend

Check data to send alerts

Data Backup

Outlook
# Technologies that we used

<table>
<thead>
<tr>
<th>Devices</th>
<th>Software</th>
<th>Reporting</th>
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</thead>
<tbody>
<tr>
<td>Windows OS laptops and</td>
<td>MS Access</td>
<td>ZOHO Online Reports</td>
</tr>
<tr>
<td>desktops</td>
<td>VB Scripts</td>
<td></td>
</tr>
<tr>
<td>Server</td>
<td>Click Yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ZOHO uploader tool</td>
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Solution Demo

Data Entry Form (UI)

Sample Alert Reports

Online Tracking Reports
Technical Challenges

- Send Emails via MS-Access based on case status (Macros)
- Auto run and quit MS-Access (VBS)
- Grant sending Emails via third-parity application (Click Yes)
The impact

- Productive innovative and sustainable solution for contract tracking
- Increased good governance and compliance
- Systematic approach to contract administration
- Effective alerting system for contracts
- Solution scaled to other countries (Ghana)
- Reduced Risk and High Performance at a very low cost
Lessons Learned

- Data Entry and Updates
- Manual case numbering with validation for flexibility
- Remote offices data entry for facilitation
Improve and Scale up?

- Leverage the existing Global SharePoint infrastructure
- Migrate the local data tables to the SharePoint instance
- Reinforce access control through SharePoint
- Merge the Service and Staff contract modules into one system
System in action