



WASHINGTON, DC

# Procurement Services

# Gatekeeper Contract Management Tool

# User Training

April 2022



# Agenda

1. Introduction to Gatekeeper
2. Contract Types to Submit into Gatekeeper
3. Contract Review Request Form
4. Resources
5. Dashboard
6. Q &A

# Introduction to Gatekeeper

- Gatekeeper is the new Procurement Services enterprise contract management tool to standardize and centralize contract reviews
- Gatekeeper provides:
  - Workflow transparency from receipt of the Contract Review Request through execution of the agreement by obtaining required reviews/approvals for compliance with GW/MFA policies
  - Central repository to archive fully executed contracts
  - Notifications for contract lifecycle and renewals

# Contract Types To Submit into Gatekeeper

- Supplier Contracts with No Financial Obligation (\$0 Requisitions)
  - MSA, NDA, EULA
- P-card Payments (Purchase Order not required)
- Non-Procurement Contracts
  - Academic Affiliation Agreements, Gift Agreements, Physician Agreements  
Real Estate Agreements, etc.



# Contract Review Request Form (Intake Form)

- Complete all mandatory data fields in Intake Form (\*)
- Upload Documents(s) to be reviewed
- Click “Submit” (at the bottom of the Intake Form)



## Review Request Form

### EMAIL ADDRESS

Please enter your email address to submit this form

### INSTRUCTIONS

- Please complete all the fields marked with an asterisk \*
- Once you have completed all the fields please click on **[Submit]**
- In order to review and track your request within Gatekeeper you will need to have an account. If you do not already have one, please visit <https://procurement.gwu.edu/gatekeeper> and click on the "Departmental Account Setup Request Form" link.

### REQUESTOR CONTACT INFORMATION

Name

Phone Number

Email

① \*Will the vendor have access to GW/MFA non-public data?

① \*Will this contract/engagement include digital accessibility?

\*Will the vendor be on campus to render services or to access GW systems/applications (e.g. Banner, EAS, other)

\*Provide a brief summary of the use and purpose for this purchase and include what the service/application does.

## VENDOR INFO

 \* Vendor Name

Legal Name

## FINANCIAL INFORMATION

\* Project Name

\* Vendor Name

 \* Total Cost of the Contract

 \* NIGP Code (Enter 888 for Non-Procurement Contracts)

\* Entity

\* Department

Start Date

Has end date?

Notice Period Date

 \* Contract Type

## PROCURE-TO-PAY TYPE

\* What type of service do you need from Procure-to-Pay?

**DESCRIPTION OF REQUEST/PROJECT**

\* Funding Source

**DOCUMENTS TO BE SUBMITTED**

\* Please select the types of documents you wish to upload (You can select multiple options)

**SECTION BELOW TO BE COMPLETED BY THE PROCURE-TO-PAY TEAM**

\*\*\*\*PROCURE-TO-PAY TEAM ONLY \*\*\*\*

Are you a member of the Procure-to-Pay Team

✓ Submit

Gatekeeper Contract & Vendor Management - Simple, Secure, Collaborative



View our blog ([http://www.gatekeeperhq.com/blog?utm\\_campaign=public-form&utm\\_source=us-5924](http://www.gatekeeperhq.com/blog?utm_campaign=public-form&utm_source=us-5924)) | Book a demo ([https://www.gatekeeperhq.com/book-gk-demo-step-1?utm\\_campaign=public-form&utm\\_source=us-5924](https://www.gatekeeperhq.com/book-gk-demo-step-1?utm_campaign=public-form&utm_source=us-5924)) | Contact us ([https://www.gatekeeperhq.com/contact\\_us?utm\\_campaign=public-form&utm\\_source=us-5924](https://www.gatekeeperhq.com/contact_us?utm_campaign=public-form&utm_source=us-5924))

# Resources

- GW Procure to Pay: **Welcome to Gatekeeper**
  - Link: <https://procurement.gwu.edu/welcome-gatekeeper>
    - Contract Review Request Form
    - Gatekeeper Tutorials
    - Gatekeeper User/Department Account Setup Request Form



# Standard Dashboard

Any pending request(s) you have will be displayed on this screen

The screenshot displays the 'Standard Dashboard' for 'The George Washington University'. The interface includes a left-hand navigation menu with categories such as Dashboards, My Dashboard, Quarterly, Vendors, Contracts, Nigp Codes, Departments, Entities, Workflows, AI Extract, Files, and Events. The main dashboard area is titled 'Test User 's Dashboard' and features a search bar and user profile information. Below the title, there are seven summary cards showing counts for 'My Cards', 'My Approvals', 'My Forms', 'Delegated from Me', 'Delegated to Me', 'My eNegotiate', and 'My eSigns', all of which are currently at 0. A table below these cards provides a breakdown of requests, with columns for 'Older', 'Last week', and 'This week', each showing a 'TOTAL: 0'. The table also includes filters for 'You Own' and 'By Date', and a set of toggle buttons for 'All', 'SLA', 'Approvals', 'Form', 'eNegotiate', and 'eSign'.



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# Q & A

