

# Contract Advisory Team – Review and Delegation (CATRAD) System User Guide

Welcome to the new CATRAD system! The look and feel is completely different, but users will find familiarity with the data entry process. To submit information to CATRAD, users navigate the system by providing the required information. This user guide contains instructions and screen shots demonstrating the process from start to finish.

Users will login to the new [CPA Portal](#) to access the application. Your [agency superuser](#) can provide access, or you may contact the SPD [Outreach Team](#) for assistance.

Go to [TxSmartbuy.com](#) and click the **Sign In** button. Enter your login credentials to begin.

Contracts ▾ Reports ▾ Help

## PLEASE LOGIN TO ACCESS YOUR WEB APPLICATIONS

**WARNING - RESTRICTED GOVERNMENT SYSTEM**  
This system is restricted to authorized users only. Unauthorized access, use, misuse or modification of this system, the data contained herein, or in transit to/from this system, may constitute a violation of federal and state and local laws and subject individual(s) to criminal and/or civil prosecution and penalties. This system and associated usage is subject to monitoring and security testing by authorized personnel. There is no expectation of privacy except as otherwise provided by applicable privacy laws. If you need a web applications id, Please [Contact your Superuser](#)

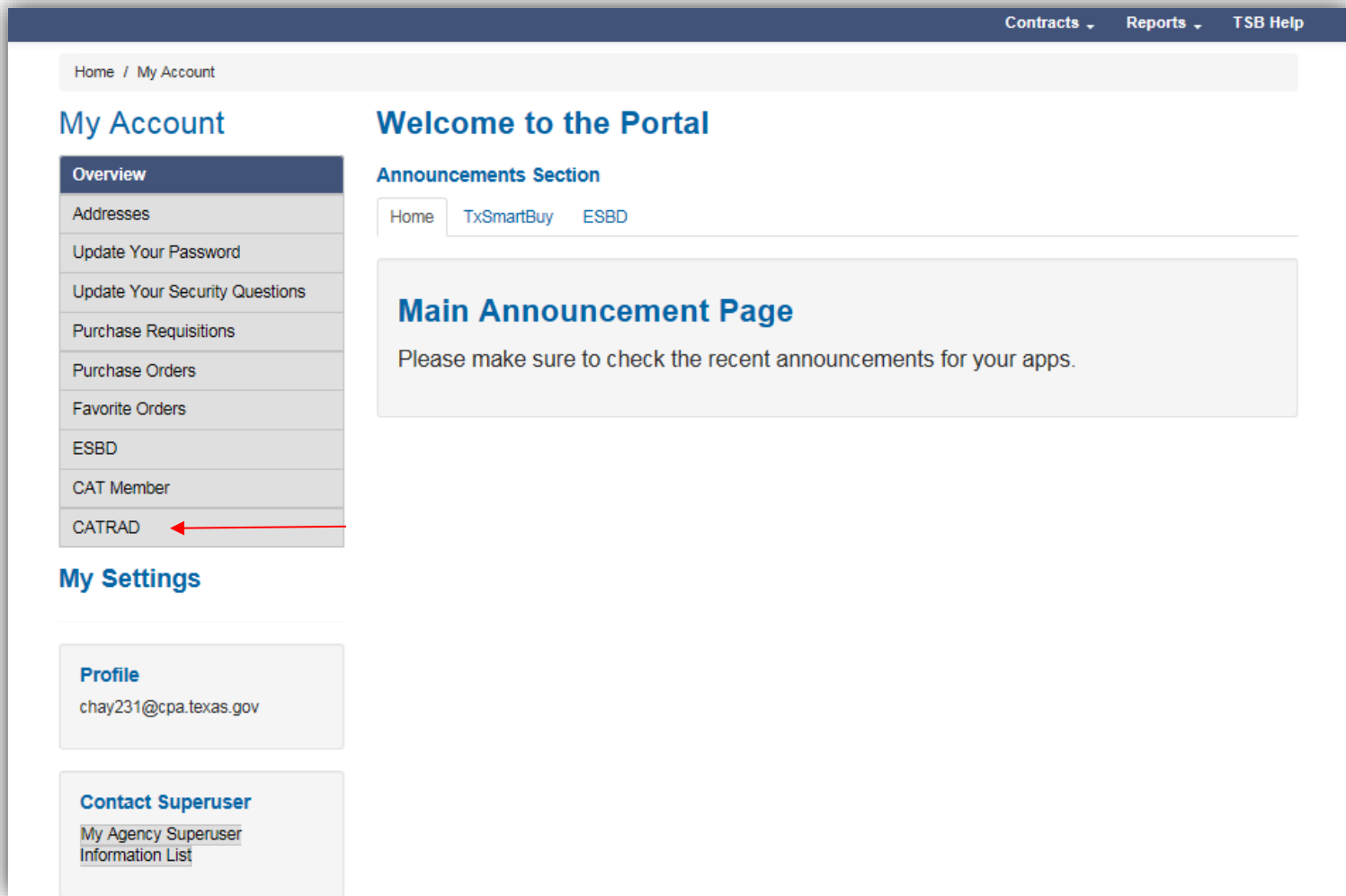
### Login Credentials

**Email Address** (required)

**Password** (required)

[Sign In](#) [Forgot password?](#)

Once you've logged in to the Portal, each user shall have the ability to complete an online form to initiate an agency request for a solicitation review. Under the My Account section, click the **CATRAD** tab.



After clicking the CATRAD tab, you will be directed to the online form. Click **Submit CATRAD Solicitation** to begin.

**My Account**

- Overview
- Addresses
- Update Your Password
- Update Your Security Questions
- Purchase Requisitions
- Purchase Orders
- Favorite Orders
- ESBD
- CAT Member
- CATRAD**

**My Settings**

**Profile**  
chay231@cpa.texas.gov

**Contact Superuser**  
My Agency Superuser Information List

**CATRAD**

[Submit Catrad Solicitation](#)

**Filter**  
Type here...

**CATRAD Reports**

Action	Solicitation Name	Solicitation Number	Status	Date Created	Solicitation Created By
	qtqtq	123132	recieved	10/25/2017 2:40 pm	TxCPA Agency for Testing - 54321 : Sushma's
	teeest	34412412	pending cancellation	10/25/2017 2:39 pm	TxCPA Agency for Testing - 54321 : Sushma's
	tetteeeeeeeeeest new	123123	pending cancellation	10/25/2017 2:28 pm	TxCPA Agency for Testing - 54321 : Sushma's
	321 anew	321	pending cancellation	10/24/2017 1:10 pm	TxCPA Agency for Testing - 54321 : Sushma's
	aaaaaa NEW	321123	pending cancellation	10/24/2017 1:08 pm	TxCPA Agency for Testing - 54321 : Sushma's
	test test	`12	pending cancellation	10/5/2017 2:12 pm	TxCPA Agency for Testing - 54321 : Sushma's
	test new workflow	1368412	pending cancellation	9/29/2017 12:40 pm	TxCPA Agency for Testing - 54321 : Sushma's
	review date test	1234567	pending cancellation	9/25/2017 10:41 am	TxCPA Agency for Testing - 54321 : Sushma's
	test izz	321	pending	8/28/2017	TxCPA Agency for Testing -

You will now see the actual form that requires specific information about the solicitation you are submitting. Some of the fields will auto populate based off your login information. All fields marked with asterisks are required. You will not be allowed to proceed to the next step if required information is left out. You will also have the ability to override information that is auto-populated. Once the required information is entered, click **Next**.

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chay231@cpa.texas.gov

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[My Agency Superuser Information List](#)

**CATRAD Form Entry**

Back

General Information | Add Nigp Codes | Delegation & Estimated Total Value | Review & Submission

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Project Information	Solicitation Information
* Purchasing Agency Number: 304	* Solicitation Number: <input type="text"/>
* Purchasing Agency Name: <input type="text"/>	* Solicitation Name: <input type="text"/>
* Project Lead Name: Codhay	* Solicitation Type: -- select an option --
* Project Lead Email Address: chay231@cpa.texas.gov	* Solicitation Description: <input type="text"/>
* Project Lead Phone Number: 123-123-1234	* Solicitation Comments: <input type="text"/>
CTPM Certification #: Maximum 8 Digits <input type="text"/>	
<b>Dates</b>	
<i>Defaulted to 30 days from today, making this date earlier can't be guaranteed.</i>	
* Planned Issuance Date of Solicitation: <input type="text"/>	
Requested Response Date from CPA or CAT: <input type="text"/>	

← Previous | Next →

Enter the NIGP Class/Item Code and click **+Add**. The NIGP Class/Item description will populate for you to verify. Click **Next** when complete.

The screenshot displays the 'My Account' dashboard on the left and the 'CATRAD Form Entry' process on the right. The 'My Account' sidebar includes links for Overview, Addresses, Update Your Password, Update Your Security Questions, Purchase Requisitions, Purchase Orders, Favorite Orders, ESBD, CAT Member, and CATRAD (highlighted). Below this is the 'My Settings' section with 'Profile' (chay231@cpa.texas.gov) and 'Contact Superuser' (My Agency Superuser Information List).

The 'CATRAD Form Entry' section features a 'Back' button and a progress bar with four steps: 'General Information', 'Add Nigp Codes' (active), 'Delegation & Estimated Total Value', and 'Review & Submission'. The main content area shows a '← Previous' button, a 'Next →' button (indicated by a red arrow), and a section titled 'Add NIGP Class/Item Code'. This section contains a 'Class:' label, an empty text input field, a green '+Add' button, and a link to 'NIGP List'. A red box highlights the input field and the '+Add' button. Below the input field are '← Previous' and 'Next →' buttons.

Enter the Estimated Total Value of the Contract and answer the additional questions. Click **Next** to proceed.

Contract value is defined as “the estimated dollar amount that a state agency may be obligated to pay pursuant to the contract and all executed and proposed amendments, extensions and renewals of the contract.”

Example:

A contract with an initial annual value of \$4 million, with three (3) annual renewals, would be calculated to have a contract value of \$12 million and is subject to CAT review.

The screenshot shows the 'My Account' interface with a sidebar on the left containing navigation links like 'Overview', 'Addresses', and 'CATRAD'. The main content area is titled 'CATRAD Form Entry' and has four tabs: 'General Information', 'Add Nigp Codes', 'Delegation & Estimated Total Value' (which is active), and 'Review & Submission'. A 'Back' button is located above the tabs. Below the tabs, there are 'Previous' and 'Next' navigation buttons. The 'Delegation & Estimated Total Value' section contains a red-bordered box with the following fields:

- \* Estimated Total Values of contract:  
\$
- \* Number of times this product/service has been solicited by the Agency:
- \* Do you require a Delegation Letter?  
-- select an option --
- \* Does This solicitation include a technology component?  
-- select an option --
- \* Is this solicitation part of a major information resource project?  
-- select an option --

At the bottom of the form, there are 'Previous' and 'Next' navigation buttons. A red arrow points from the 'Next' button in the top navigation area to the 'Next' button at the bottom of the form.

**Quality Assurance Team (QAT)** solicitations tied to **Major Information Resources Projects (MIRP)** must be submitted in the application. The application will ask if the solicitation is part of an MIRP.

- If yes, ask if solicitation has gone through QAT
  - If yes – application will flag Solicitation as “QAT approved”
  - If no – application will flag Solicitation as “QAT not approved”
- If not part of MIRP – application will flag Solicitation as “QAT N/A”

Home / My Account / catradCreate

## My Account

- Overview
- Addresses
- Update Your Password
- Update Your Security Questions
- Purchase Requisitions
- Purchase Orders
- Favorite Orders
- Users
- Vendor Performance Reporting
- TPPD
- ESBD
- CATRAD**

## My Settings

**Profile**  
chay231@cpa.texas.gov

**Contact Superuser**  
My Agency Superuser  
Information List

**CATRAD Form Entry**

General Information Add Nigp Codes **Delegation & Estimated Total Value** Review & Submission

← Previous Next →

### Delegation & Estimated Total Value

\* Estimated Total Values of contract:  
\$ 1000000

\* Number of times this product/service has been solicited by the Agency:  
1

\* Do you require a Delegation Letter?  
NO

\* Does This solicitation include a technology component?  
YES

\* Is this solicitation part of a major information resource project?  
YES

\* Has this PROJECT been approved by the Quality Assurance Team? :  
-- select an option --

← Previous Next →

You will now be able to view all of the information that was entered. You cannot edit from this view; however, if users see something that is incorrect, click **Previous** to go back and make edits.

CAT Member

**CATRAD**

### My Settings

**Profile**  
scott.greene@cpa.texas.gov

**Contact Superuser**  
[My Agency Superuser Information List](#)

[← Previous](#)

Project Information	Solicitation Information
* Purchasing Agency Number: 54321	* Solicitation Number: RFP-36-NEW USER TRAINING
* Purchasing Agency Name: TxCPA Agency for Testing - 54321	* Solicitation Name: NEW USER TRAINING
* Project Lead Name: Scott Greene	* Solicitation Type: RFP
* Project Lead Email Address: scott.greene@cpa.texas.gov	* Solicitation Description: NEW USER TRAINING
* Project Lead Phone Number: (512) 123-4567	* Solicitation Comments: PLEASE HELP
CTPM Certification #: Maximum 8 Digits	<b>Dates</b> <i>Defaulted to 30 days from today, making this date ea can't be guaranteed.</i> * Planned Issuance Date of Solicitation: 09/13/2017



On the same page, users will have the ability to upload the solicitation, along with any other corresponding documentation relating to the solicitation for review by clicking the **Submit & Upload Solicitation Documents** green tab.

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**CATRAD Form Entry**

General Information | Add NIGP Codes | Delegation & Estimated Total Value | **Review & Submission**

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Project Information	Solicitation Information
* Purchasing Agency Number: E4321	* Solicitation Number: 123456789
* Purchasing Agency Name: TXCPA Agency for Testing - E4321	* Solicitation Name: test
* Project Lead Name: Codhey	* Solicitation Type: IFB
* Project Lead Email Address: chay231@cpa.texas.gov	* Solicitation Description: test package
* Project Lead Phone Number: 512-463-3382	* Solicitation Comments: test
CTPM Certification #: Maximum 8 Digits	<b>Dates</b> Defaulted to 30 days from today; making this date earlier cant be guaranteed. * Planned Issuance Date of Solicitation: 12/01/2017 Requested Response Date from CPA or CAT: 11/24/2017 * Requested Response Date Explanation : test file
<b>Add NIGP Class/Item Code</b> 07201-Class 1 Trucks (6,000 Lb. Gvw Or Less)	<b>Delegation &amp; Estimated Total Value</b> * Estimated Total Values of contract: 2000000 * Number of times this product/service has been solicited by the Agency: 2 * Do you require a Delegation Letter?: YES * Does This solicitation Include a technology component?: NO * Is this solicitation part of a major information resource project?: NO

**Submit & Upload solicitation documents**

← Previous

Click the **Update Files** tab.

The screenshot displays a user interface with a left sidebar and a main content area. The sidebar contains a 'My Account' section with a list of menu items: Overview, Addresses, Update Your Password, Update Your Security Questions, Purchase Requisitions, Purchase Orders, Favorite Orders, ESB, CAT Member, and CATRAD (highlighted in dark blue). Below this is a 'My Settings' section with a 'Profile' card showing the email 'chay231@cpa.texas.gov' and a 'Contact Superuser' card with a link to 'My Agency Superuser Information List'. The main content area is titled 'CATRAD DETAILS' and includes a blue 'Back' button. Below the button are two input fields: 'Solicitation Name' with the value 'test' and 'Solicitation Number' with the value '123456789'. A 'Recommendations' section shows 'No Recommendations'. A 'Record Attachment' section shows 'No Files attached'. At the bottom of the main area is a blue 'Update Files' button with a folder icon, which is pointed to by a red arrow.

You will have the ability to upload multiple documents for review. Select the file number you wish to upload and click **Next**.

The screenshot shows a web interface titled "File(s) Upload System". On the left, a "STEPS" sidebar lists two steps: "1 Number of Files" (highlighted in blue) and "2 Upload File on the File Cabinet". The main content area is titled "Number of Files" and contains the instruction "Please select how many files you need to upload". Below this is a dropdown menu labeled "Files Number" with the value "1" selected. A red rectangular box highlights the instruction and the dropdown menu.

A row of three buttons: "Cancel", "< Back", and "Next >". A red arrow points to the "Next >" button.

Select the file you wish to upload and provide a description of what the file contains. Click **Finish** and close the window when prompted.

The screenshot shows the same "File(s) Upload System" interface. The "STEPS" sidebar now shows "1 Number of Files" with a green checkmark and "2 Upload File on the File Cabinet" highlighted in blue. The main content area is titled "Upload File on the File Cabinet" and contains the instruction "Select the file(s) you want to upload". Below this is a "Select File 1" section with a "Choose File" button and the text "No file chosen". Below that is a "Description 1" label and a large text input area. A red rectangular box highlights the "Upload File on the File Cabinet" section and the text input area.

A row of three buttons: "Cancel", "< Back", and "Finish". A red arrow points to the "Finish" button.

You will be directed back to the initial “Update Files” screen. Click on the refresh button near the browser to view what has been uploaded. If you do not refresh your screen, you will not see any documents. To add another file, repeat the previous steps. Again, do not forget to refresh your screen after uploading each document.

The screenshot displays a user account interface. On the left, there is a sidebar with a 'My Account' section containing a list of menu items: Overview, Addresses, Update Your Password, Update Your Security Questions, Purchase Requisitions, Purchase Orders, Favorite Orders, ESD, CAT Member, and CATRAD (which is highlighted). Below this is a 'My Settings' section with a 'Profile' card showing the email 'chay231@cpa.texas.gov' and a 'Contact Superuser' button.

The main content area is titled 'CATRAD DETAILS' and includes a blue 'Back' button. Below the button are two input fields: 'Solicitation Name' with the value 'test' and 'Solicitation Number' with the value '123456789'. A 'Recommendations' section shows 'No Recommendations'. At the bottom, a 'Record Attachement' table lists one file: 'CATRAD-Solicitation-File-test2.txt' with a description of 'test file' and a delete icon. A blue 'Update Files' button is located below the table.

#	Name	Description
1	CATRAD-Solicitation-File-test2.txt	test file 