



PRO Contract Lifecycle Management System User Guide









Vendor/Supplier User Guide

August 15, 2025



- This document is intended to be used as a User Guide for individuals who are vendors/suppliers associated with the Procurement Division (PRO). It is divided into sections based on functionality in the PRO Contract Lifecycle Management System. You may reference the table of contents to determine where in the User Guide the topic you are interested in learning more information about is located.
- For any comments, questions, or feedback, please contact (512) 416-2400

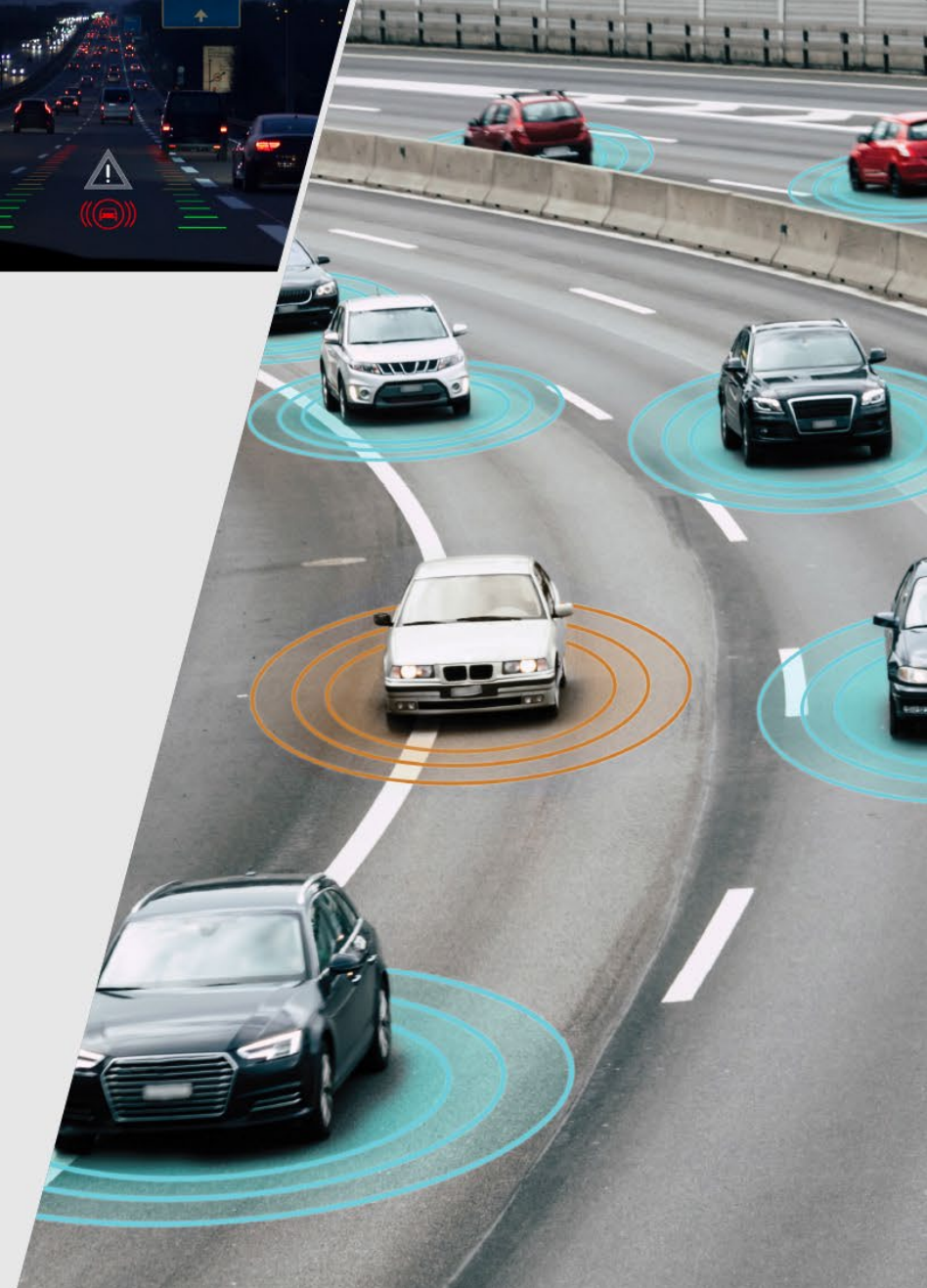


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PRO Contract Lifecycle Management System

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- The PRO Contract Lifecycle Management (CLM) system streamlines contracting activities for the TxDOT Procurement Division's contracts.
 - PRO CLM reduces the time and effort required to manage contracts by centralizing the contracting process.
 - PRO CLM is designed to increase visibility into contracting activities and improve communication throughout the contract lifecycle.



Vendor Portal Overview

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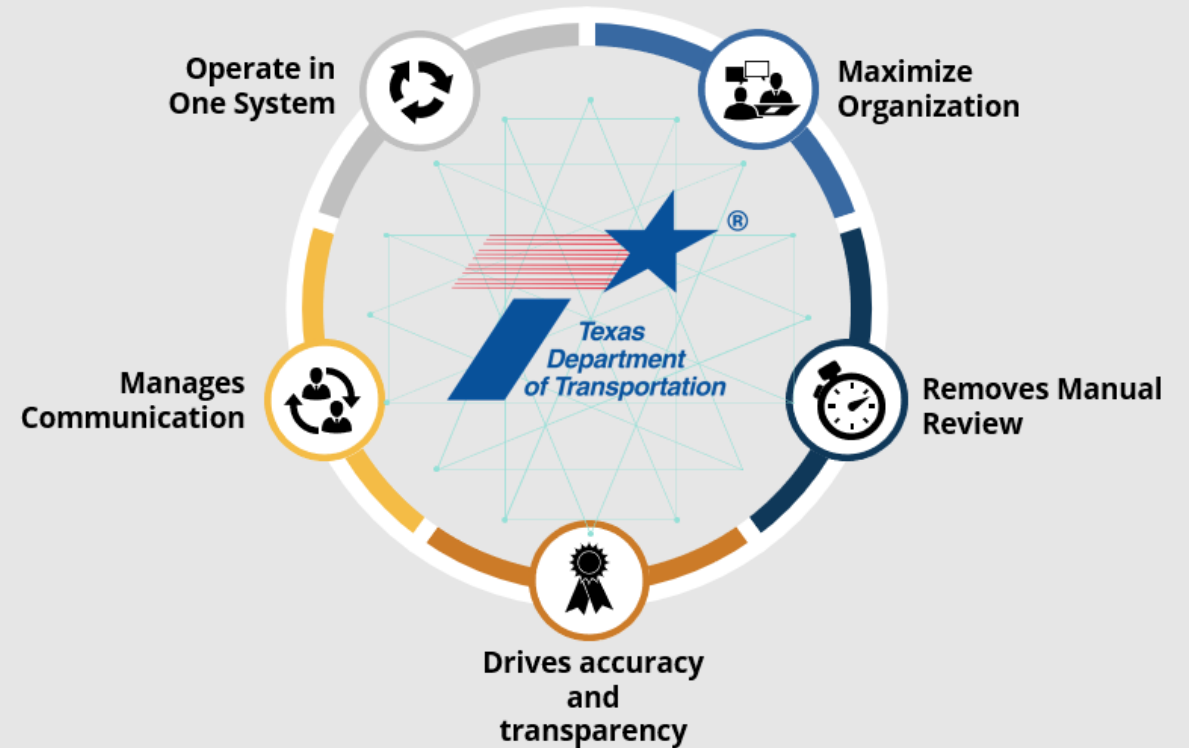


■ What is the Vendor Portal?

- The Vendor Portal is a place to manage contracts with the Procurement Division. You can upload files, upload bond and insurance information, and track the status of your documents.

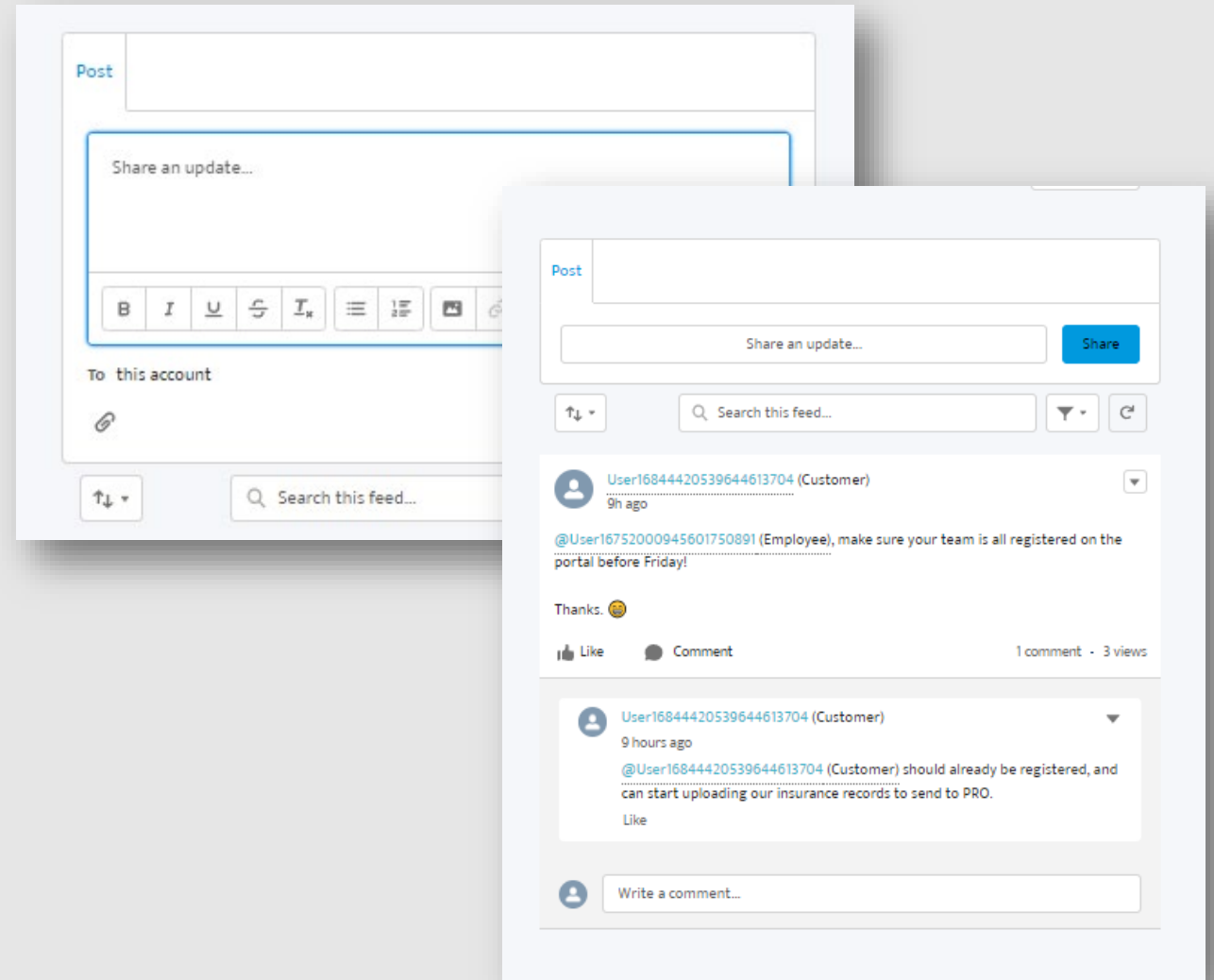
■ What are the benefits of the Portal?

- Operates in one system to reduce the time and inefficiencies
- Manages communication across internal TxDOT PRO teams and external Vendors/Suppliers
- Provides organization
- Drives accuracy and transparency
- Removes certain manual processes





- Chatter is a communication tool where you can communicate with the Procurement Division about your account, contracts, or questions you may have in the contracting process.
- Features include:
 - Creating posts
 - Leaving comments
 - Liking comments
 - Using the “@” character to directly mention other users





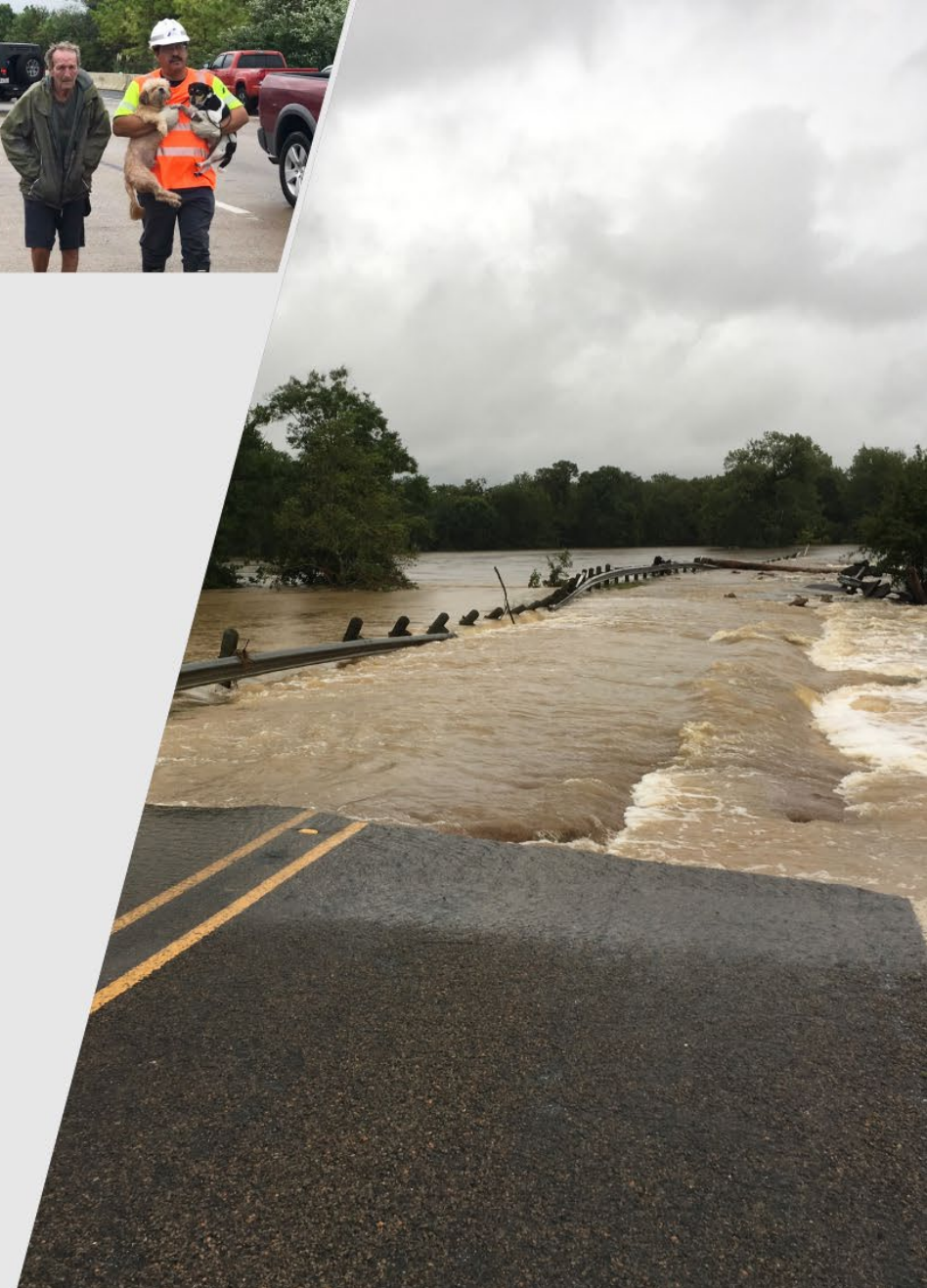
- Tasks are assigned when certain actions are needed in the contracting process. If a Vendor/Supplier is assigned to act on a part of the process, that user will be given a task to complete.
- Features include:
 - A record of tasks assigned throughout the contracting process
 - Visibility into task statuses
 - Ability to share updates or leave comments on a task
 - Receiving email notifications upon task assignment (if subscribed)

The screenshot displays the 'Task' interface for a specific contract. The title bar shows a green task icon and the text 'Task Contract #60100000000000000000000000004343: Monthly Progress Assessment Report and Form'. Below the title, there are tabs for 'DETAILS', 'RELATED', and 'ACTIVITY'. The 'DETAILS' tab is active, showing 'Task Information' with fields for 'Subject', 'Assigned To' (PRO External Portal User), 'Due Date' (6/30/2023), 'Name', and 'Related To' (60100000000000000000000000004343). A 'Comments' section shows a message about HSP Compliance. Below this is 'Additional Information' with 'Priority' (Normal) and 'Status' (Open). To the right, an 'Activity' feed shows a post from 'User16752000945601750891 (Employee)' who updated the record 23m ago. The post has a 'Share' button and a 'Search this feed...' input. Below the post is a 'Comments' section with a 'Write a comment...' input and 'Like' and 'Comment' buttons. The bottom of the activity feed shows another post from the same user who created the task 23m ago, with a 'View more details' link and 'Like' and 'Comment' buttons.



Vendor Portal Basics

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Vendor Profile Creation



1. Creating a new profile

Click the *Not a Member* text to begin profile creation.

2. Filling in the required fields

Fill in all fields. If you do not know your Federal EIN at the time of self-registration, you can leave it blank. However, you will not have full access until the proper EIN is entered.

3. Completing the signup process

Click *Sign Up* after entering all information.

PRO CLM Login

Welcome to TxDOT Procurement Division Contract Lifecycle Management System for Vendors

Username

Password

Log in

[Forgot your password?](#)

[Not a member?](#)

[Vendor Training](#)

[Drop Off Insurance](#)

First Name

Last Name

Email

Federal Employer Identification Number

Create Password

Confirm Password

Sign Up

[Already have an account?](#)

Dropping Off Insurance (3rd Party)



1. Dropping off insurance

To drop off insurance on behalf of a vendor, click *Drop Off Insurance*.

2. Searching for the vendor

Search for the vendor covered under the insurance. If they cannot be found, search and select “PRO Insurance Drop Box.”

3. Uploading insurance forms

Click *Upload Files* or drag and drop files to upload.

PRO CLM Login
Welcome to TxDOT Procurement Division Contract Lifecycle Management System for Vendors

Username

Password

Log in

[Forgot your password?](#)

[Vendor Training](#)

[Not a member?](#)

[Drop Off Insurance](#) **1**

Insurance Drop Off

Vendor

2

3 Or drop files

Note: If you are unable to find your desired Vendor, please upload the Insurance to "PRO Insurance Drop Box".

Basic Settings Navigation (Homepage Overview)



1. Logging in

Login using your username and password.

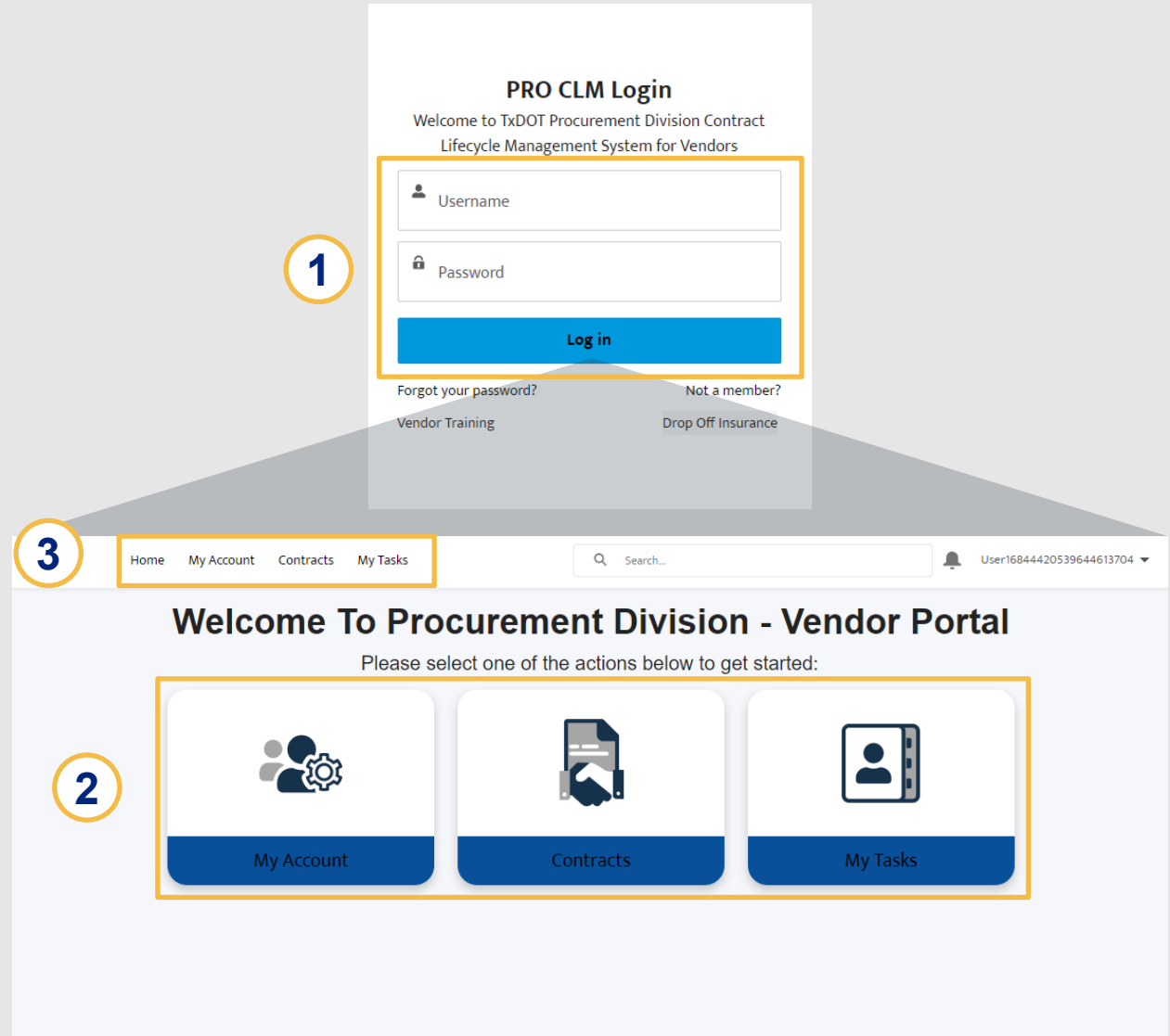
2. Viewing the homepage

The homepage features the following icons:

- My Account
- Contracts
- My Tasks

3. Using navigational tabs

Navigational tabs on the top of the page match the icons on the *Home* screen.



Basic Settings Navigation (Profile Settings)

1. Accessing settings

Click your username at the top right of the page.

2. Accessing profile settings

Select the *My Profile* option.

3. Navigating to profile information

Select the *Profile* tab.

4. Viewing profile information

The *Profile* tab displays the following information:

- Name
- Manager
- Title
- Email
- Mobile
- Address
- About Me

The screenshot illustrates the navigation steps for accessing profile settings in the PRO CLM system. It is divided into two parts: the top part shows the main dashboard, and the bottom part shows the profile settings page.

Top Screenshot (Main Dashboard):

- Step 1:** The user's username, "User16844420539644613704", is highlighted in the top right corner.
- Step 2:** The "My Profile" option is highlighted in the dropdown menu that appears after clicking the username.
- Step 3:** The "Profile" tab is highlighted in the left sidebar of the profile settings page.
- Step 4:** The "Settings & Preferences" section is highlighted in the left sidebar of the profile settings page.

Bottom Screenshot (Profile Settings Page):

The profile settings page displays the following information:

- User:** User16844420539644613704 (Customer)
- Name:** PRO External Portal User
- Title:**
- Manager:**
- Company Name:**
- Email:** proportaluser@yahoo.com
- Phone:**
- Mobile:** data
- Address:**
- About Me:**

Basic Settings Navigation (Settings & Preferences)



1. Accessing settings

Click your username at the top right of the page.

2. Accessing profile settings

Click the *My Profile* option.

3. Navigating to profile settings

Click the *Settings & Preferences* tab.

4. Viewing profile settings

The *Settings & Preferences* gives Suppliers access to:

- Account username and email
- Location settings
- Email notifications

5. Saving changes to profile settings

Finish and click *Save*.

The screenshot illustrates the navigation process for accessing profile settings in the Procurement Division - Vendor Portal. It is divided into two parts: the top part shows the main dashboard, and the bottom part shows the 'My Settings' page.

Top Part (Dashboard):

- Step 1:** The user's username 'User16844420539644613704' is highlighted in the top right corner.
- Step 2:** A dropdown menu is shown with 'My Profile' selected.
- Step 3:** The 'Settings & Preferences' tab is highlighted in the left sidebar.
- Step 4:** The 'My Settings' page is shown, with the 'ACCOUNT DETAILS' section highlighted.
- Step 5:** The 'Save' button is highlighted in the bottom right corner of the 'My Settings' form.

Bottom Part (My Settings):

The 'My Settings' page displays the following information:

- ACCOUNT DETAILS:**
- Account:**
- Username:** proportaluser@yahoo.com
- Email Address *:** proportaluser@yahoo.com
- Password:** (field is empty)
- Change Password:** (link)
- Save:** (button)

Basic Settings Navigation (Email Notification Opt-In)



1. Accessing settings

Click your username at the top right of the page.

2. Accessing profile settings

Click the *My Profile* option.

3. Navigating to profile settings

Click the *Settings & Preferences* tab.

4. Configuring email notifications

Use the checkboxes to configure your email notification preferences.

5. Saving preferences

Click *Save* to save your preferences.

The screenshot illustrates the five steps for accessing and configuring email notifications in the Procurement Division - Vendor Portal. Step 1 shows the user's username 'User16844420539644613704' at the top right. Step 2 shows the 'My Profile' option in the dropdown menu. Step 3 shows the 'Settings & Preferences' tab selected in the left sidebar. Step 4 shows the 'Email Notifications' section with checkboxes for 'Enable email notifications' and 'Sends me a direct message', both of which are checked. Step 5 shows the 'Save' button at the bottom right of the settings panel.

1. Click your username at the top right of the page.

2. Click the *My Profile* option.

3. Click the *Settings & Preferences* tab.

4. Use the checkboxes to configure your email notification preferences.

5. Click *Save* to save your preferences.



My Account

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Basic Settings Navigation (Details)

1. Account Access

Click the *My Account* tab.

2. Details

Click the *Details* tab.

3. My Account

The *Details* tab displays information about the Supplier's account, including:

- General account information
- Billing address
- System information

The screenshot illustrates the navigation process within the Procurement Division - Vendor Portal. Step 1 highlights the 'My Account' tab in the top navigation bar. Step 2 highlights the 'DETAILS' tab within the account information section. Step 3 highlights the 'System Information' section, which displays details about the account owner and creation/modification dates.

Step 1: Account Access

Click the *My Account* tab.

Step 2: Details

Click the *Details* tab.

Step 3: My Account

The *Details* tab displays information about the Supplier's account, including:

- General account information
- Billing address
- System information

Account Information:

Account Name	Parent Account
Mandalorian Inc	

Billing Address Information:

Billing Address

System Information:

Account Owner: Christian Norwood

Created By: Christian Norwood , 6/28/2023, 3:34 PM

Last Modified By: Christian Norwood , 6/28/2023, 3:35 PM

Basic Settings Navigation (Related)

1. Account Access

Click the *My Account* tab.

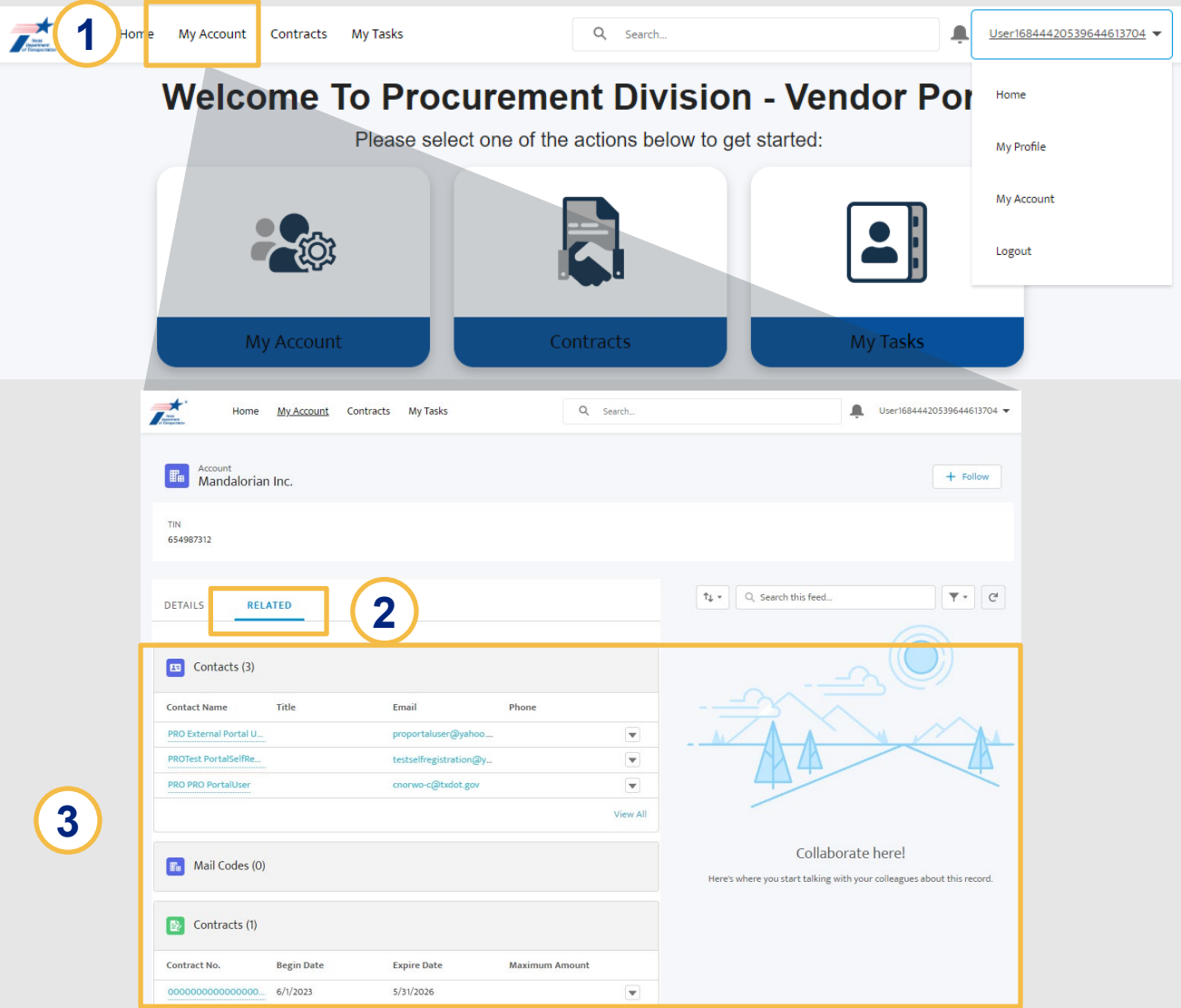
2. My Account

Click the *Related* tab.

3. My Account

The *Related* tab displays information related to the Supplier's account, including:

- Contacts
- Contracts
- Location Codes
- Insurance
- Files



My Account (Upload/Complete Insurance)



1. Account Access

Click the *My Account* tab.

2. Related

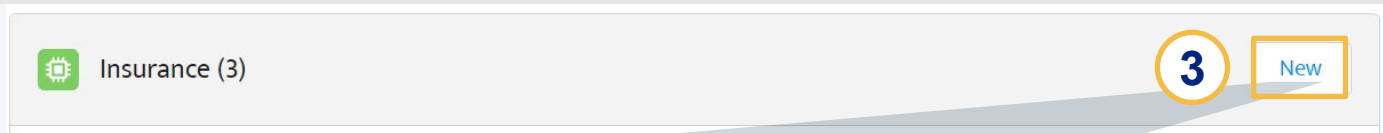
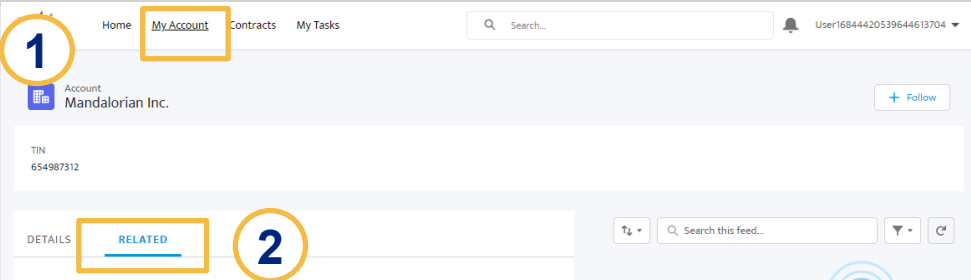
Click the *Related* tab.

3. Scroll to Insurance

Scroll and click on the *New* key.

4. Fill Information Fields

Fill the information fields to complete the insurance upload. Once finished, click *Save*.



New Insurance

Information

Insurance ID

Status
Draft

* Form
--None--

Workers Comp Expiration

General Liability Expiration

Auto Expiration

Additional Insurance Expiration

* Insurance Coverage Type
--None--

Supplier Information

* Vendor
Mandalorian Inc.

Comments

Comments

Cancel Save & New **Save**



Contracts

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Contracts (Overview)

1. Navigate to Contracts page

To access a page with a list of contracts, click the *Contracts* tab on the top of the page.

Page Symbols:

2. List View Controls
3. Display Table
4. Refresh Page
5. Edit List
6. Charts
7. Filter

[illegible]

3. Viewing a contract

On a contract, the Supplier can view information about the contract on the *Details* tab.



[Home](#)

[My Account](#)

[Contracts](#)

[My Tasks](#)

User16844420539644613704 ▾

Contracts
000000000000000000000000004343

+ Follow

New Bond

Printable View

Supplier

Begin Date

Expire Date

Mandalorian Inc.

6/1/2023

5/31/2026

DETAILS

RELATED

Information

Business Unit
000000000000000000000000004343

Contract No.
0000000000000000000000000000004343

Description

Contract Dates

Contract Date
5/1/2023

No. of Renewals Remaining
2

↑ ↓

▾

↻

Leigh Wilson (Employee) updated this record.
June 3, 2023 at 12:57 PM

Vendor POC
PROTest PortalSelfRegistration to Andrew Buske

👍 Like

💬 Comment

User16752000945601750891 (Employee) updated this record.
May 30, 2023 at 6:08 PM

Contracts (New Bond)

- ## 1. Navigating to contracts

Click the *Contracts* tab.

- ## 2. Opening a contract

Click on blue hyperlink to access contract.

- ### 3. Creating a new bond

Click the *New Bond* button.

- #### 4. Filling out bond information

Fill in the new bond's information and click *Save* once finished.

Home

My Account

Contracts

My Tasks

Search...

User16844420539644613704

Contracts

All PRO Contracts

Printable View

1 item • Sorted by Contract No. • Filtered by All contracts - Record Type, Business Unit • Updated a minute ago

Search this list...

Settings

Grid

Refresh

Export

Filter

Contract No. ↑	Business Unit	Supplier	Begin Date	Expire Date	
000000000000000000000000004343	000000000000004343	Mandalorian Inc.	6/1/2023	5/31/2026	

Home

My Account

Contracts

My Tasks

Search...

PRO External Portal User

Contracts

601000000000000000000000000000000000004343

New Bond

Printable View

New Bond

Supplier ⓘ
Mandalorian Inc.

Supplier POC

PRO External Portal User

*Bond Expiration Date

*Bond Type

--None--

Other Bond Type Description: ⓘ

*Bonding Company

Comments

Cancel

Save



My Tasks

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My Tasks (Dashboard)



1. Navigating to tasks

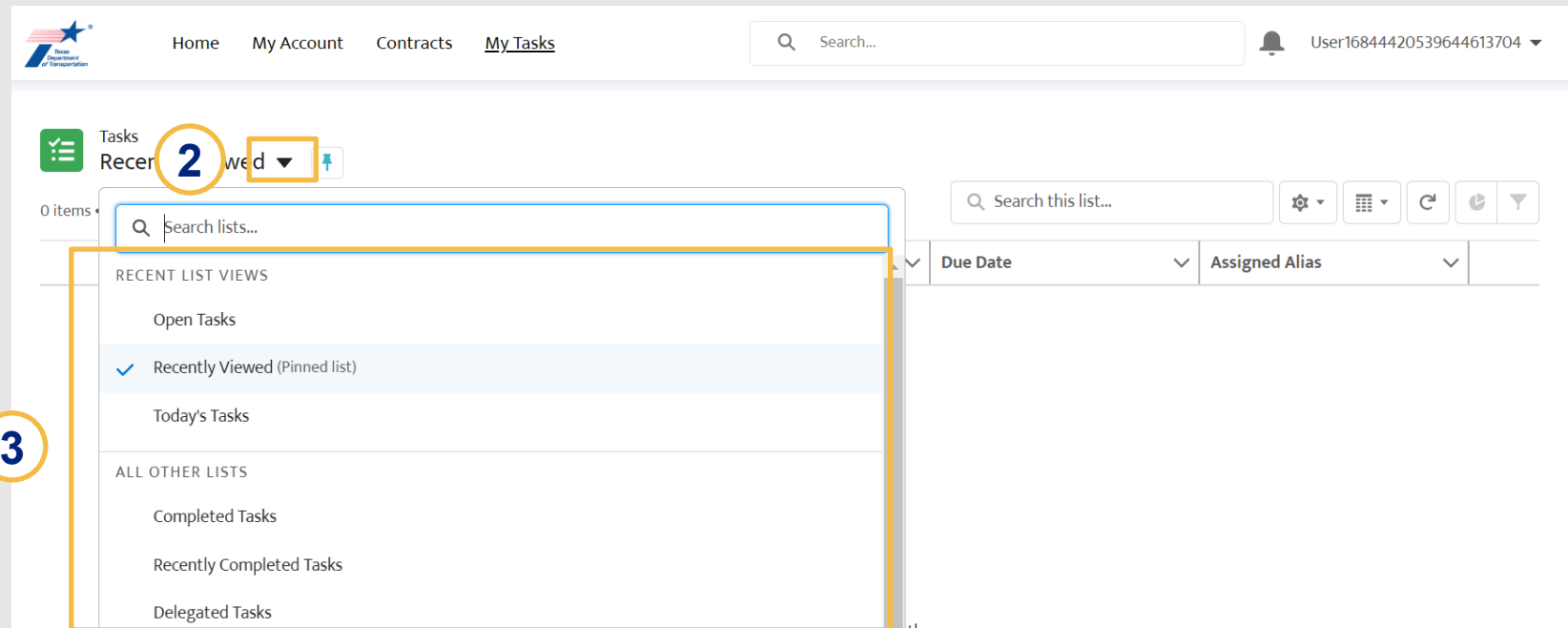
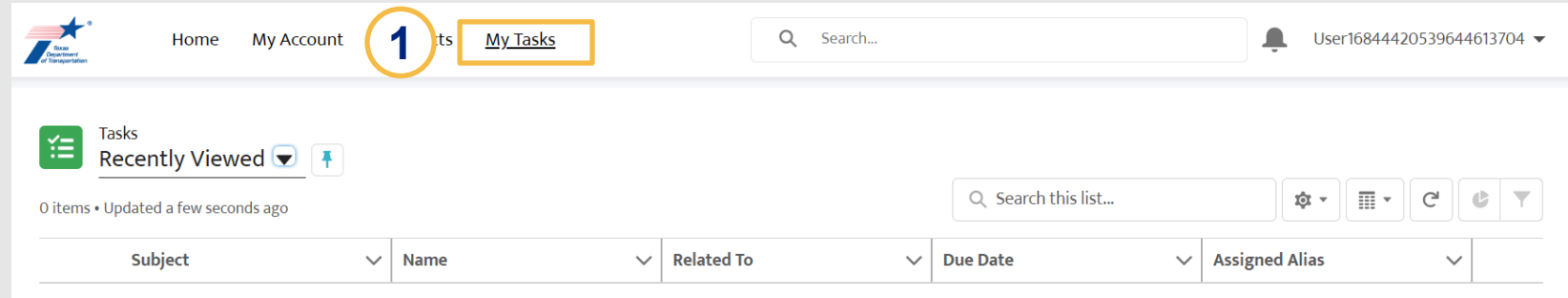
Click on the *My Tasks* tab.

2. Filtering tasks

Click on the *black arrow* drop-down.

3. Selecting a list view

Use the various list views to control which tasks are displayed, e.g. “Recently Viewed” shows tasks that have opened most recently.



- ### 3. Viewing details of the task

The details tab displays information about the task.

2

3