Procurement Contracts 101

Teresa Page

Procurement Contracts

- Procurement Contract functionality allows you to enter basic contract information in to PeopleSoft, once the contract has been finalized, so that you can track spend against it.

- This functionality does NOT assist in the creation of or execution of a contract.

Procurement Contracts

- Institutions will use a shared SetID for procurement contracts – ‘POCON’.
  - Institutions will add/maintain their agency contract information in the POCON SetID.
  - Institutions will need a Contract Administrator. This person will add/maintain the agency contract information.
    - Contract Admins will have authority to view and edit any contract entered in the POCON SetID, even if it was entered by a different institution. Admins will need to be careful to only update contracts that have been entered for their institution.

- USG & Statewide contracts will be added/maintained by the system office in the POCON SetID.

Procurement Contracts

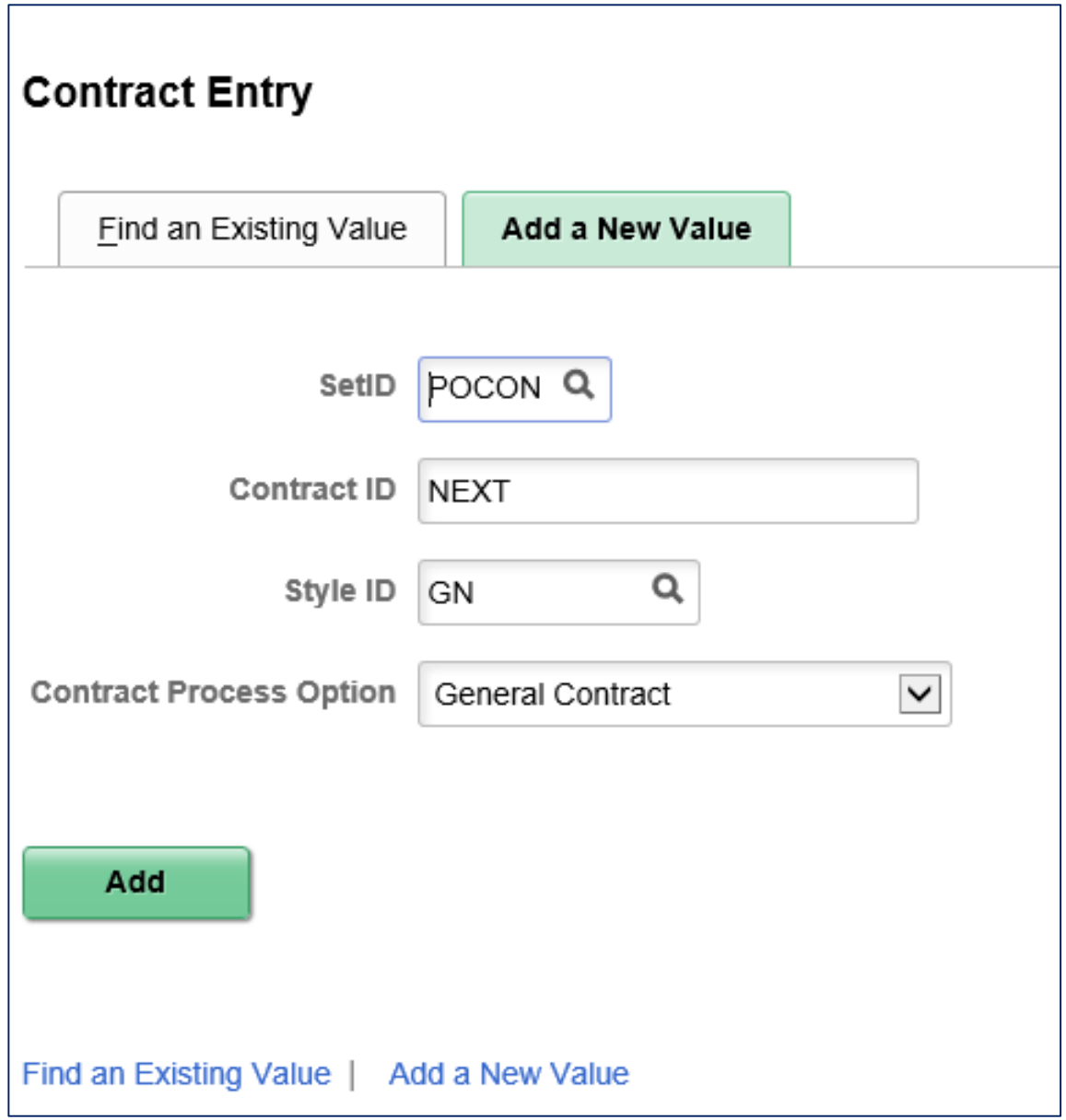
- Institutions must use the SHARE SetID suppliers in order to use the procurement contract functionality.
  - Procurement Contracts entered by the Institution will have a Contract ID that begins with the first 2 digits of their Business Unit. The contract ID field allows for 25 characters.
  - USG contracts that are available for all to use will begin with a different identifier.
  - Statewide Contract ID's will not be changed and will be entered into the system in the same format as they are received.

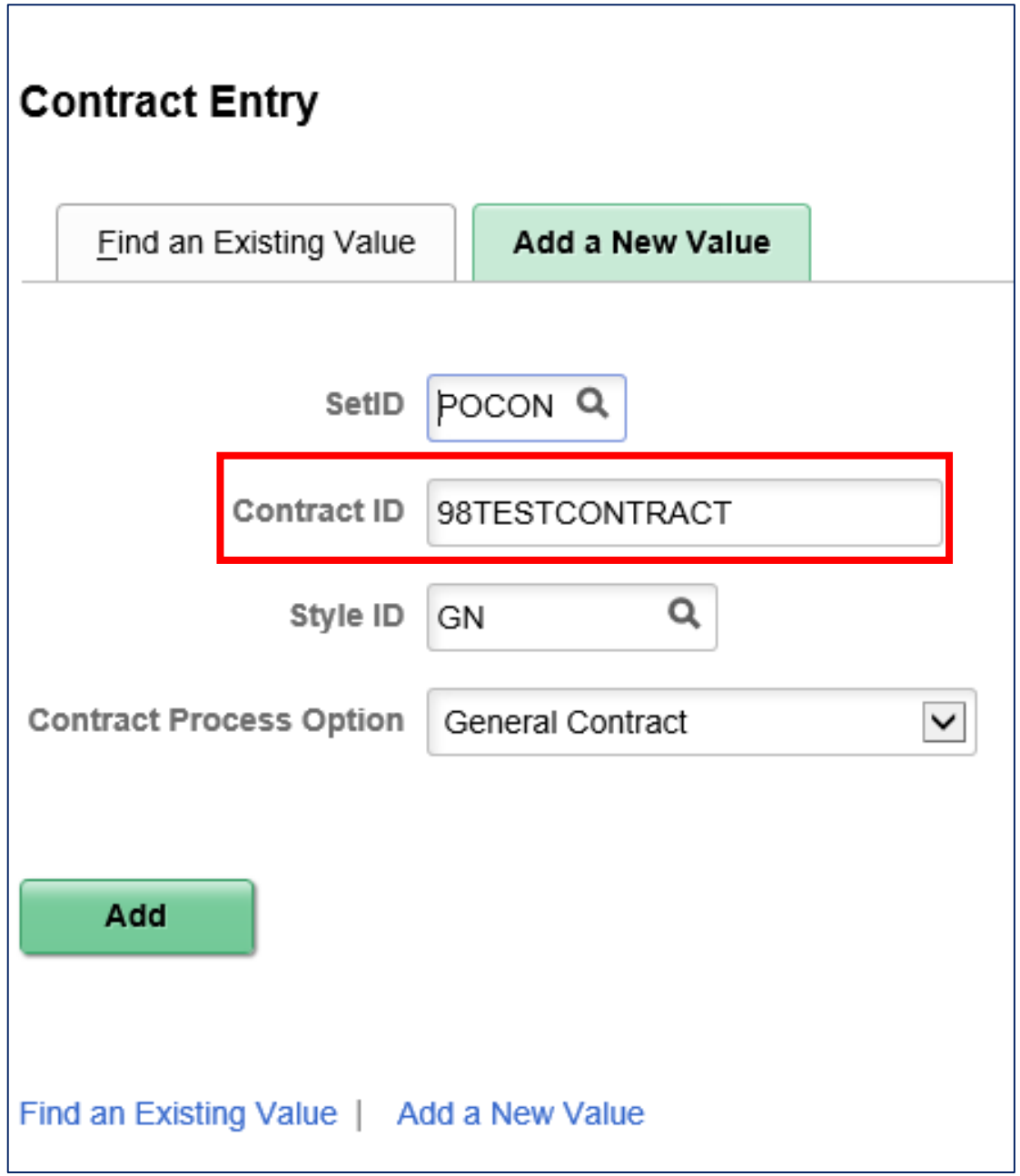
Procurement Contracts

Security Roles & User Preferences

- Roles:
  - BOR_PO_CONTRACT_ADMIN – Contract Administrator
  - BOR_PO_CONTRACT_INQUIRY – Those who need inquiry access for Procurement Contracts
  - BOR_PO_CONTRACT_REPORTS – Those who need access to reports

- User Preferences:
  - Procurement link > Contract Process link – here you will define default options as well as the type of action a Contract Admin can take


Contract Entry
Find an Existing Value
Add a New Value
SetID
POCON
Contract ID
NEXT
Style ID
GN
Contract Process Option
General Contract
Add
Find an Existing Value | Add a New Value


Contract Entry
Find an Existing Value
Add a New Value
SetID
POCON
Contract ID
98TESTCONTRACT
Style ID
GN
Contract Process Option
General Contract
Add
Find an Existing Value | Add a New Value

Contract Entry

Contract

SetID POCON Copy From Contract

Contract ID 98TESTCONTRACT

*Status Open

Administrator/Buyer

Contract Version

Version 1 Status Current

New Version Approval Due Date

Header

*Contract Style General Contract

Process Option General Contract

*Supplier Supplier Search

*Supplier ID

*Begin Date 09/19/2019

Expire Date

Renewal Date

Currency USD CRRNT

Primary Contact

Supplier Contract Ref

Description

Master Contract ID

Tax Exempt ID

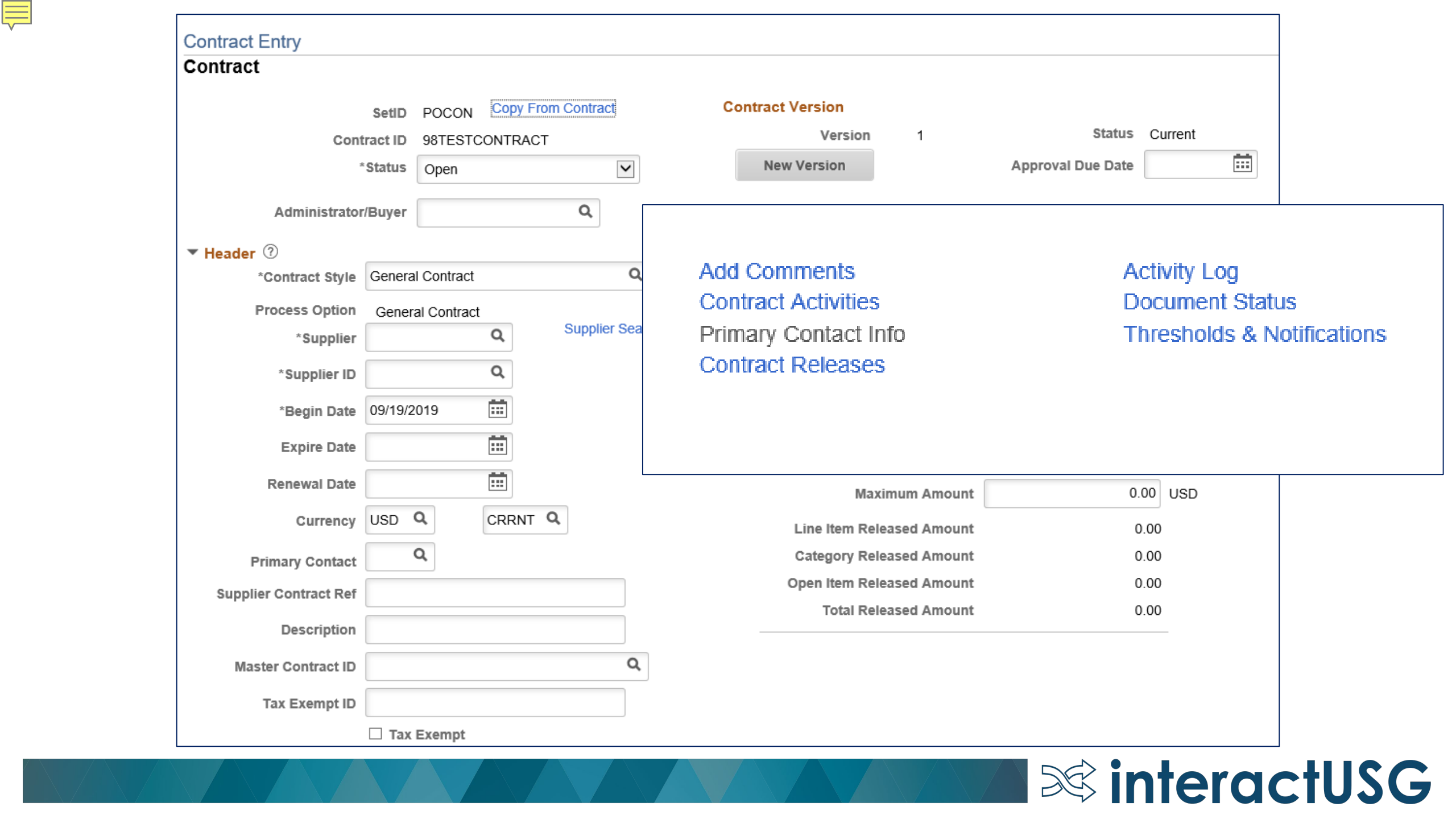
Tax Exempt

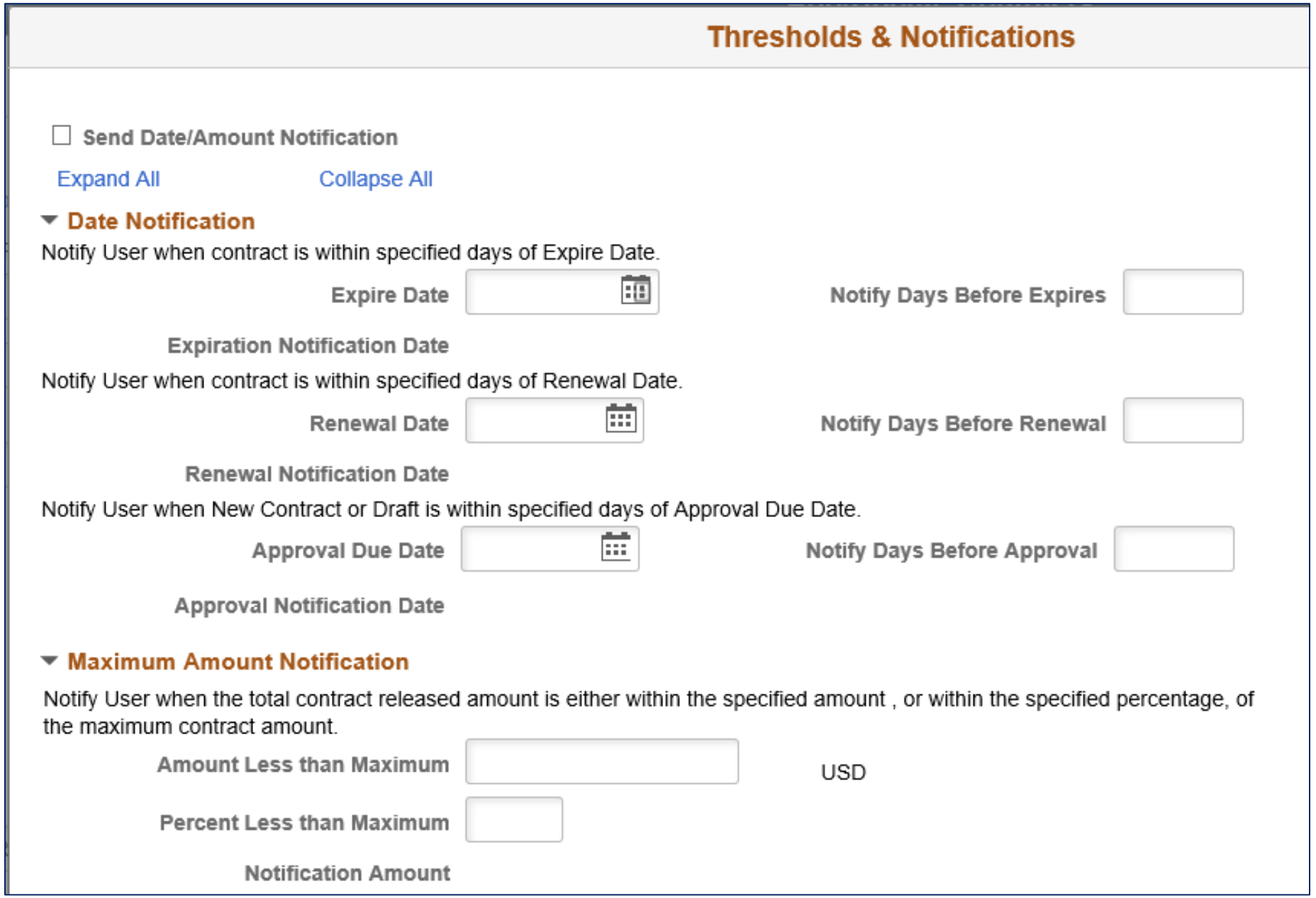
Add Comments
Contract Activities
Primary Contact Info
Contract Releases

Activity Log
Document Status
Thresholds & Notifications

Amount Summary

Maximum Amount	0.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Total Released Amount	0.00	


Contract Entry
Contract
SetID POCON
Copy From Contract
Contract ID 98TESTCONTRACT
*Status Open
Administrator/Buyer
Contract Version
Version 1
Status Current
New Version
Approval Due Date
Header
*Contract Style General Contract
Process Option General Contract
*Supplier
*Supplier ID
*Begin Date 09/19/2019
Expire Date
Renewal Date
Currency USD
CRRNT
Primary Contact
Supplier Contract Ref
Description
Master Contract ID
Tax Exempt ID
Tax Exempt
Add Comments
Contract Activities
Primary Contact Info
Contract Releases
Activity Log
Document Status
Thresholds & Notifications
Maximum Amount 0.00 USD
Line Item Released Amount 0.00
Category Released Amount 0.00
Open Item Released Amount 0.00
Total Released Amount 0.00


Thresholds & Notifications
Send Date/Amount Notification
Expand All
Collapse All
Date Notification
Notify User when contract is within specified days of Expire Date.
Expire Date
Notify Days Before Expires
Expiration Notification Date
Notify User when contract is within specified days of Renewal Date.
Renewal Date
Notify Days Before Renewal
Renewal Notification Date
Notify User when New Contract or Draft is within specified days of Approval Due Date.
Approval Due Date
Notify Days Before Approval
Approval Notification Date
Maximum Amount Notification
Notify User when the total contract released amount is either within the specified amount , or within the specified percentage, of the maximum contract amount.
Amount Less than Maximum
USD
Percent Less than Maximum
Notification Amount

Notification Assignments

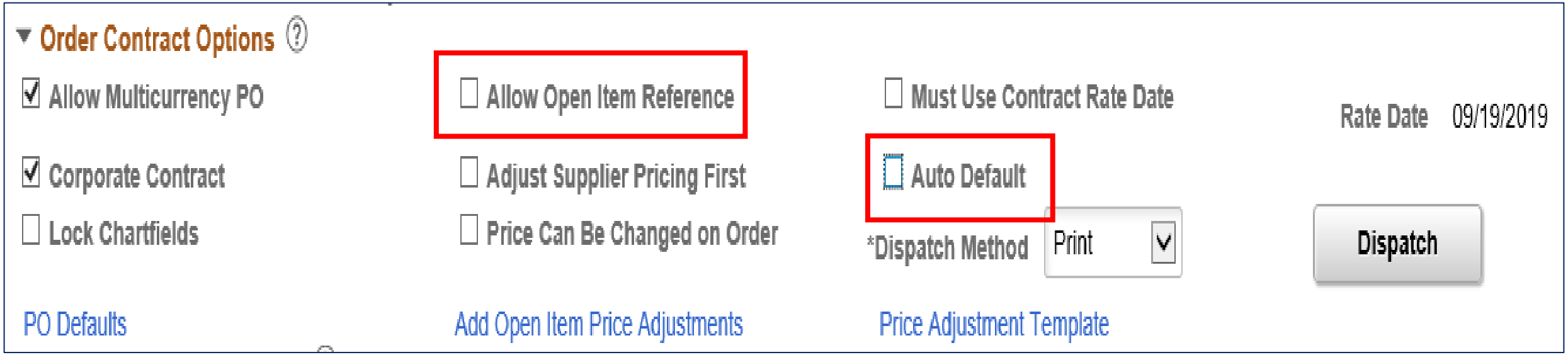
1-1 of 1 | View All

	Notification Type	User ID	User Description	Email Address		
1					+	−

Amount Summary

Maximum Amount	0.00	USD
Total Line Released Amount	0.00	
Total Category Released Amount	0.00	
Open Item Released Amount	0.00	

OK Cancel


Order Contract Options
Allow Multicurrency PO
Allow Open Item Reference
Must Use Contract Rate Date
Rate Date 09/19/2019
Corporate Contract
Adjust Supplier Pricing First
Auto Default
Lock Chartfields
Price Can Be Changed on Order
*Dispatch Method
Print
Dispatch
PO Defaults
Add Open Item Price Adjustments
Price Adjustment Template

Contract Items

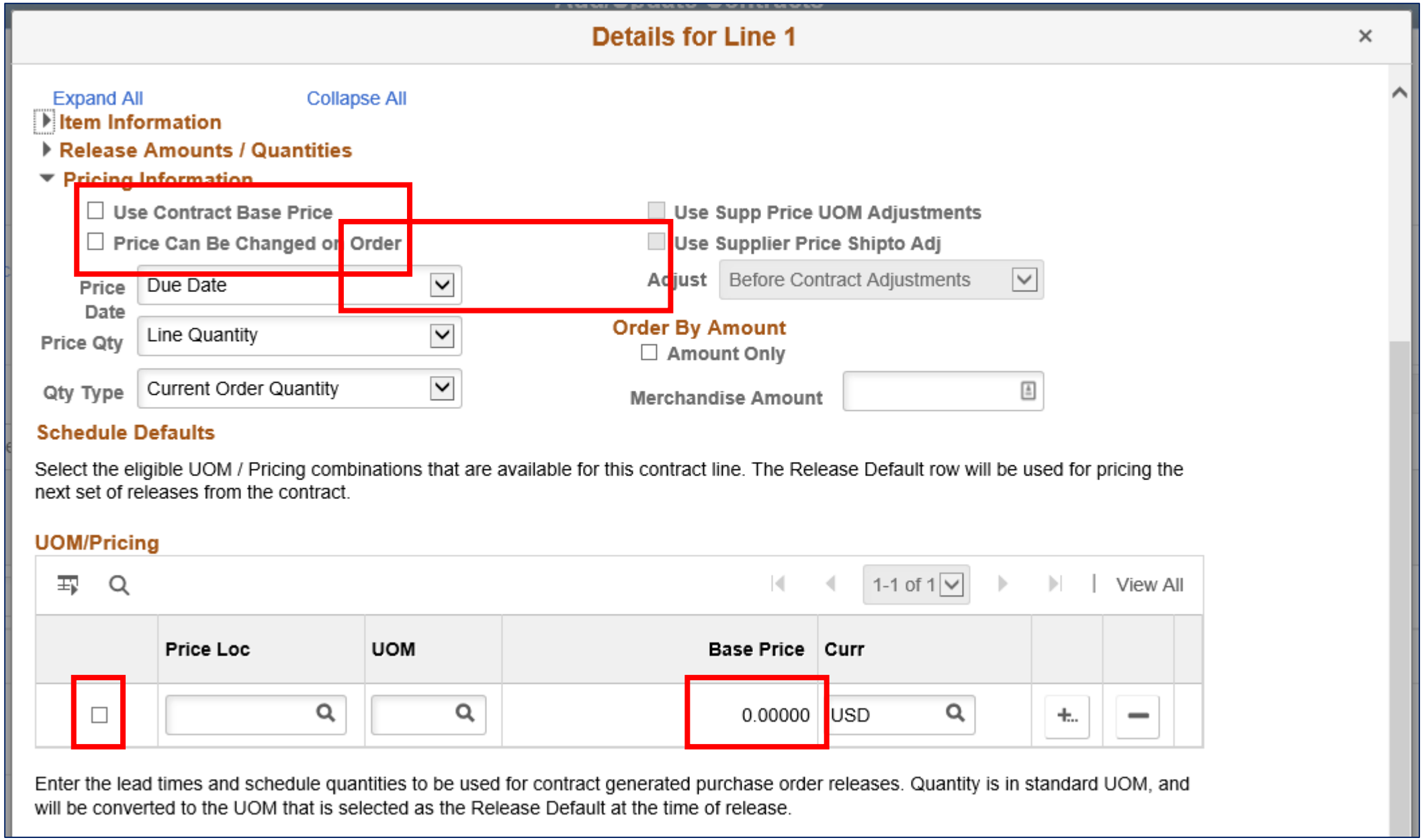
Catalog Search | Item Search | Search for Contract Lines

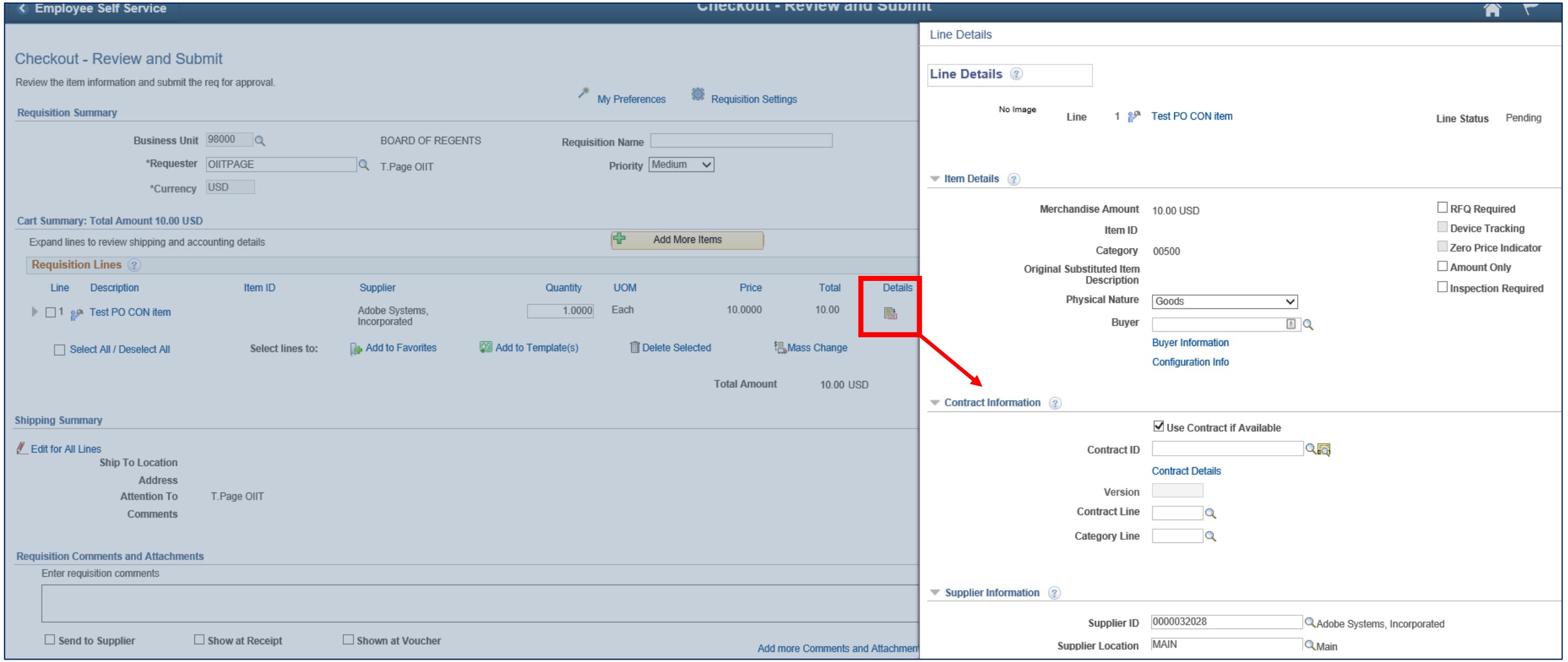
Lines

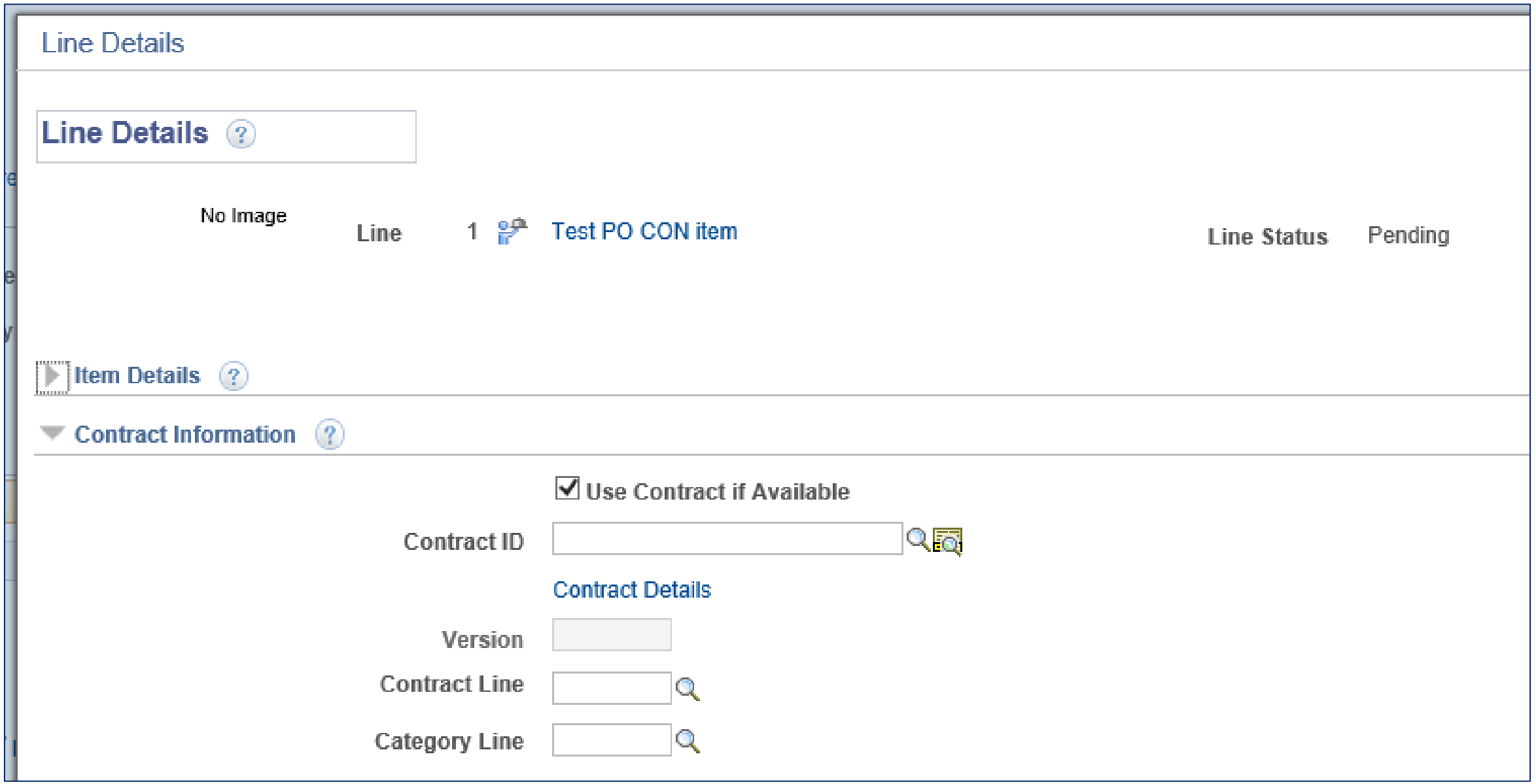
Details | Order By Amount | Item Information | Default Schedule | Release Amounts | Release Quantities | Line Groupings

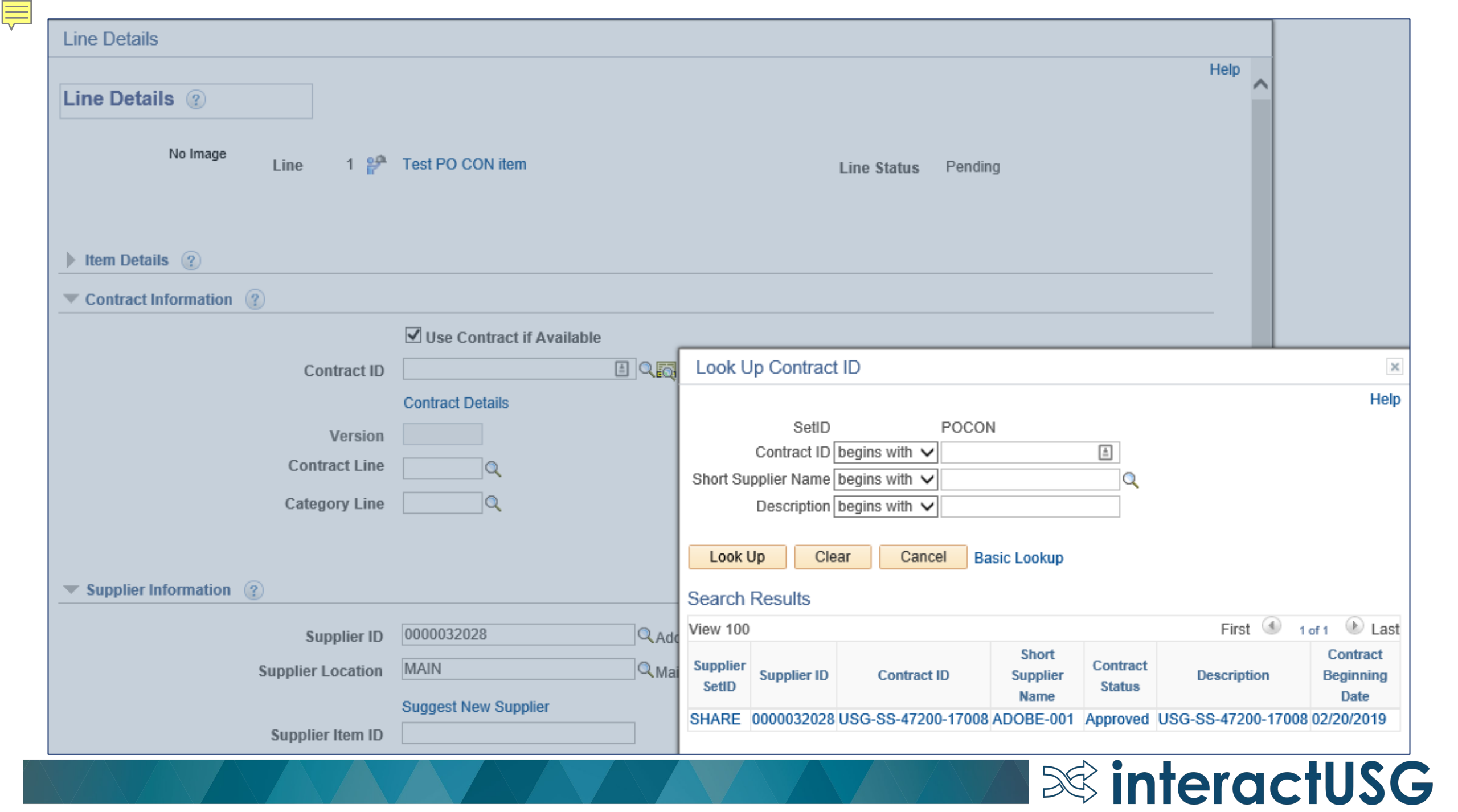
Line		Item	Description		UOM	Category	Merchandise Amt	
1								

View Category Hierarchy | Category Search


Details for Line 1
Expand All
Collapse All
Item Information
Release Amounts / Quantities
Pricing Information
Use Contract Base Price
Price Can Be Changed on Order
Use Supp Price UOM Adjustments
Use Supplier Price Shipto Adj
Price Date
Due Date
Adjust
Before Contract Adjustments
Price Qty
Line Quantity
Order By Amount
Amount Only
Qty Type
Current Order Quantity
Merchandise Amount
Schedule Defaults
Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.
UOM/Pricing
1-1 of 1
View All
Price Loc
UOM
Base Price
Curr
0.00000
USD
Enter the lead times and schedule quantities to be used for contract generated purchase order releases. Quantity is in standard UOM, and will be converted to the UOM that is selected as the Release Default at the time of release.


Employee Self Service
Checkout - Review and Submit
Review the item information and submit the req for approval.
My Preferences
Requisition Settings
Requisition Summary
Business Unit 98000 BOARD OF REGENTS
Requisition Name
*Requester OIITPAGE T.Page OIIT
Priority Medium
*Currency USD
Cart Summary: Total Amount 10.00 USD
Expand lines to review shipping and accounting details
Add More Items
Requisition Lines
Line Description Item ID Supplier Quantity UOM Price Total Details
1 Test PO CON item Adobe Systems, Incorporated 1.0000 Each 10.0000 10.00
Select All / Deselect All
Select lines to:
Add to Favorites
Add to Template(s)
Delete Selected
Mass Change
Total Amount 10.00 USD
Shipping Summary
Edit for All Lines
Ship To Location
Address
Attention To T.Page OIIT
Comments
Requisition Comments and Attachments
Enter requisition comments
Send to Supplier
Show at Receipt
Shown at Voucher
Add more Comments and Attachment
Line Details
Line Details
No Image
Line 1 Test PO CON item
Line Status Pending
Item Details
Merchandise Amount 10.00 USD
Item ID
Category 00500
Original Substituted Item Description
Physical Nature Goods
Buyer
Buyer Information
Configuration Info
RFQ Required
Device Tracking
Zero Price Indicator
Amount Only
Inspection Required
Contract Information
Use Contract if Available
Contract ID
Contract Details
Version
Contract Line
Category Line
Supplier Information
Supplier ID 0000032028 Adobe Systems, Incorporated
Supplier Location MAIN Main


Line Details
Line Details
No Image
Line 1 Test PO CON item
Line Status Pending
Item Details
Contract Information
Use Contract if Available
Contract ID
Contract Details
Version
Contract Line
Category Line


Line Details
Help
Line Details
No Image
Line 1 Test PO CON item
Line Status Pending
Item Details
Contract Information
Use Contract if Available
Contract ID
Contract Details
Version
Contract Line
Category Line
Supplier Information
Supplier ID 0000032028
Supplier Location MAIN
Suggest New Supplier
Supplier Item ID
Look Up Contract ID
Help
SetID POCON
Contract ID begins with
Short Supplier Name begins with
Description begins with
Look Up
Clear
Cancel
Basic Lookup
Search Results
View 100
First 1 of 1 Last
Supplier SetID
Supplier ID
Contract ID
Short Supplier Name
Contract Status
Description
Contract Beginning Date
SHARE 0000032028 USG-SS-47200-17008 ADOBE-001 Approved USG-SS-47200-17008 02/20/2019

Line Details

Line Details

No Image

Line 1 Test PO CON item

Item Details

Contract Information

Use Contract if Available

Contract ID USG-SS-47200-17008

Contract Details

Version 1

Contract Line

Category Line

Line Details

Line Details

No Image

Line 1 Test PO CON item

Item Details

Contract Information

Use Contract if Available

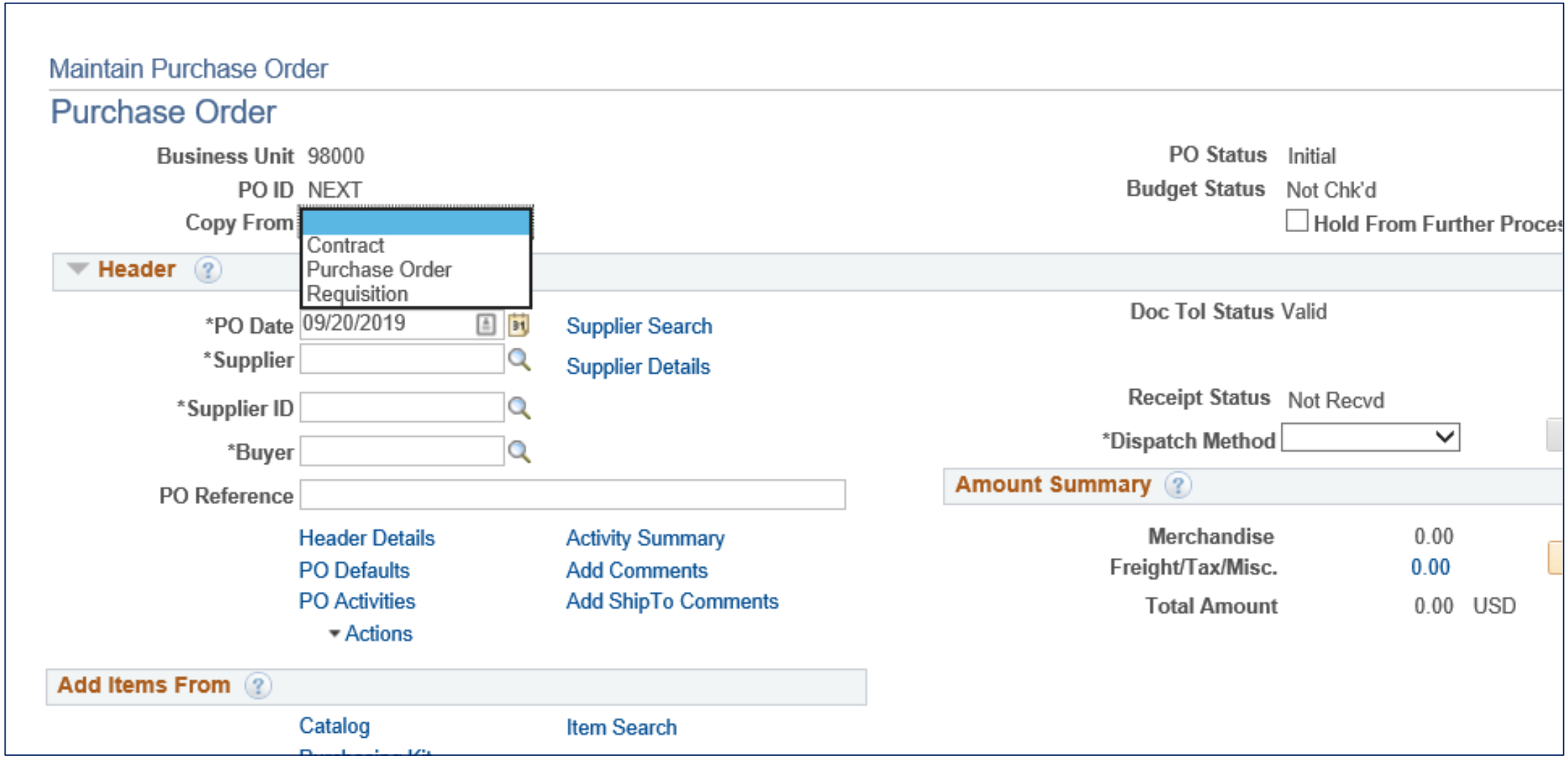
Contract ID USG-SS-47200-17008

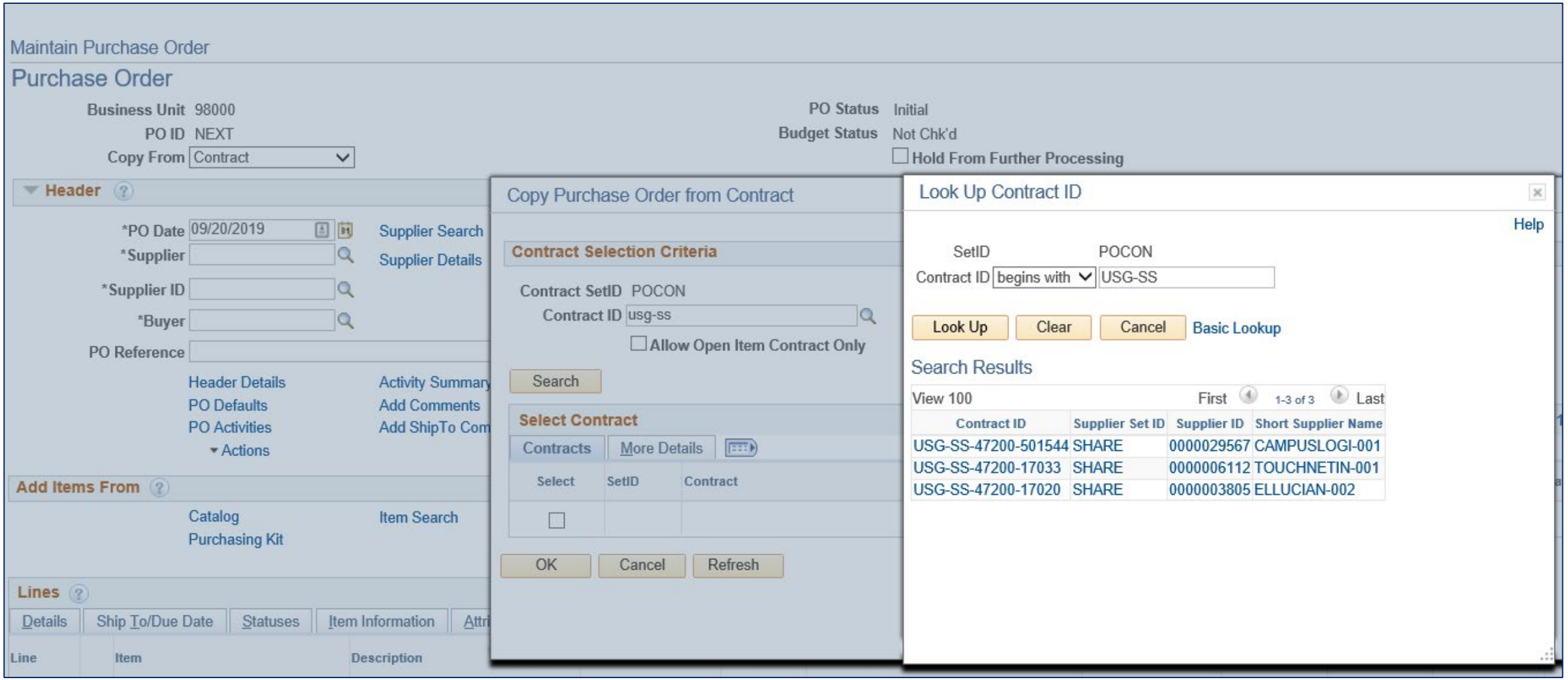
Contract Details

Version 1

Contract Line

Category Line


Maintain Purchase Order
Purchase Order
Business Unit 98000
PO ID NEXT
Copy From
Contract
Purchase Order
Requisition
PO Status Initial
Budget Status Not Chk'd
Hold From Further Proces
Header
*PO Date 09/20/2019
*Supplier
*Supplier ID
*Buyer
PO Reference
Supplier Search
Supplier Details
Doc Tol Status Valid
Receipt Status Not Recvd
*Dispatch Method
Amount Summary
Merchandise 0.00
Freight/Tax/Misc. 0.00
Total Amount 0.00 USD
Header Details
PO Defaults
PO Activities
Actions
Activity Summary
Add Comments
Add ShipTo Comments
Add Items From
Catalog
Item Search


Maintain Purchase Order
Purchase Order
Business Unit 98000
PO ID NEXT
Copy From Contract
PO Status Initial
Budget Status Not Chk'd
Hold From Further Processing
Header
*PO Date 09/20/2019
*Supplier
*Supplier ID
*Buyer
PO Reference
Supplier Search
Supplier Details
Header Details
PO Defaults
PO Activities
Actions
Activity Summary
Add Comments
Add ShipTo Com
Add Items From
Catalog
Purchasing Kit
Item Search
Lines
Details
Ship To/Due Date
Statuses
Item Information
Line
Item
Description
Copy Purchase Order from Contract
Contract Selection Criteria
Contract SetID POCON
Contract ID usg-ss
Allow Open Item Contract Only
Search
Select Contract
Contracts
More Details
Select
SetID
Contract
OK
Cancel
Refresh
Look Up Contract ID
Help
SetID POCON
Contract ID begins with USG-SS
Look Up
Clear
Cancel
Basic Lookup
Search Results
View 100
First 1-3 of 3 Last
Contract ID
Supplier Set ID
Supplier ID
Short Supplier Name
USG-SS-47200-501544 SHARE 0000029567 CAMPUSLOGI-001
USG-SS-47200-17033 SHARE 0000006112 TOUCHNETIN-001
USG-SS-47200-17020 SHARE 0000003805 ELLUCIAN-002

Maintain Purchase Order

Purchase Order

Business Unit 98000
PO ID NEXT
Copy From

PO Status Initial
Budget Status Not Chk'd
Hold From Further Processing

Header

*PO Date 09/20/2019
*Supplier
*Supplier ID
*Buyer
PO Reference

Supplier Search
Supplier Details

Doc Tol Status Valid

Receipt Status Not Recvd
*Dispatch Method
Dispatch

Header Details
PO Defaults
PO Activities
Actions

Activity Summary
Add Comments
Add ShipTo Comments

Amount Summary

Merchandise	0.00	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	0.00	USD

Add Items From

Catalog
Purchasing Kit
Item Search

Lines

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

Line		Item	Description		SetID	Contract ID	Contract Version	Contract Line	Category Line	Release
1					POCON					

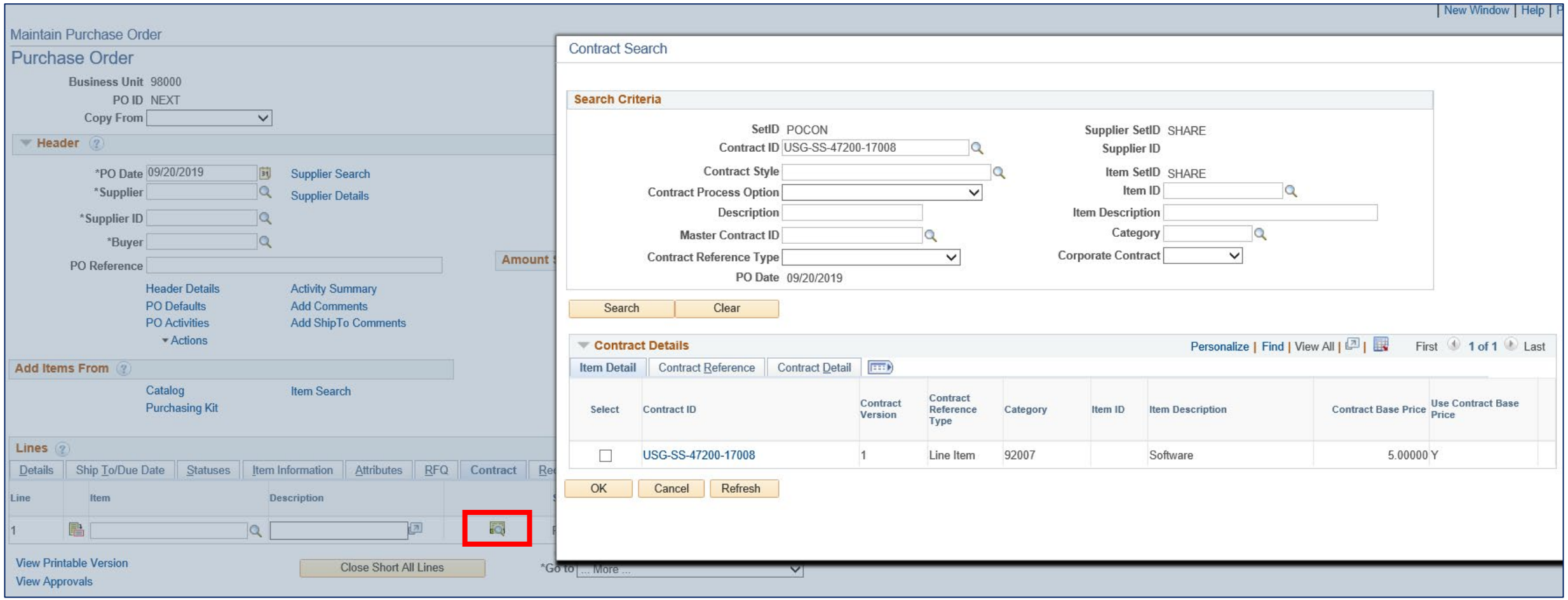
View Printable Version
View Approvals

Close Short All Lines

*Go to ... More ...

Save | Notify | Refresh

interactUSG


New Window | Help | P
Maintain Purchase Order
Purchase Order
Business Unit 98000
PO ID NEXT
Copy From
Header
*PO Date 09/20/2019
*Supplier
*Supplier ID
*Buyer
PO Reference
Supplier Search
Supplier Details
Header Details
PO Defaults
PO Activities
Actions
Activity Summary
Add Comments
Add ShipTo Comments
Add Items From
Catalog
Purchasing Kit
Item Search
Lines
Details
Ship To/Due Date
Statuses
Item Information
Attributes
RFQ
Contract
Line
Item
Description
1
View Printable Version
View Approvals
Close Short All Lines
*Go to
... More ...
Contract Search
Search Criteria
SetID POCON
Contract ID USG-SS-47200-17008
Contract Style
Contract Process Option
Description
Master Contract ID
Contract Reference Type
PO Date 09/20/2019
Supplier SetID SHARE
Supplier ID
Item SetID SHARE
Item ID
Item Description
Category
Corporate Contract
Search
Clear
Contract Details
Personalize | Find | View All | First 1 of 1 Last
Item Detail
Contract Reference
Contract Detail
Select
Contract ID
Contract Version
Contract Reference Type
Category
Item ID
Item Description
Contract Base Price
Use Contract Base Price
USG-SS-47200-17008
1
Line Item
92007
Software
5.00000
Y
OK
Cancel
Refresh

Procurement Contracts

- When can I start?!
  - Institutions should plan to test in the FPLAY environment.
  - Institutions to let ITS know when they are ready to begin testing.

Questions?