**Review and Complete Procurement Contract**

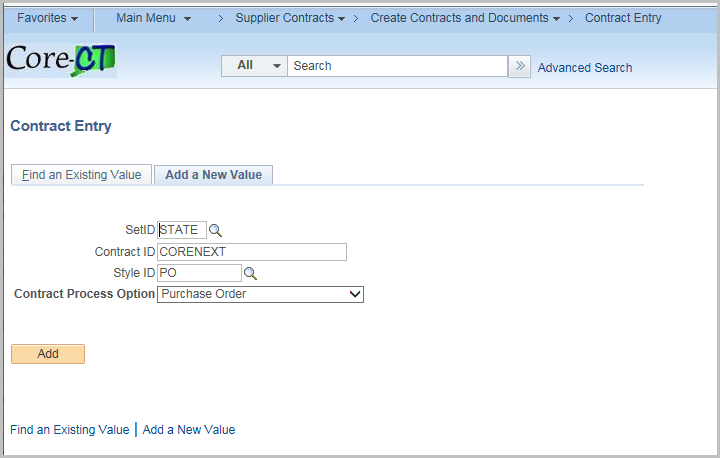
**Navigation**: Supplier Contracts > Create Contracts and Documents > Contract Entry

**or**  Procurement Contracts > Add/Update Contracts

(either Navigation will work)

Must have a **Contract Creator** role to access the Procurement Contract

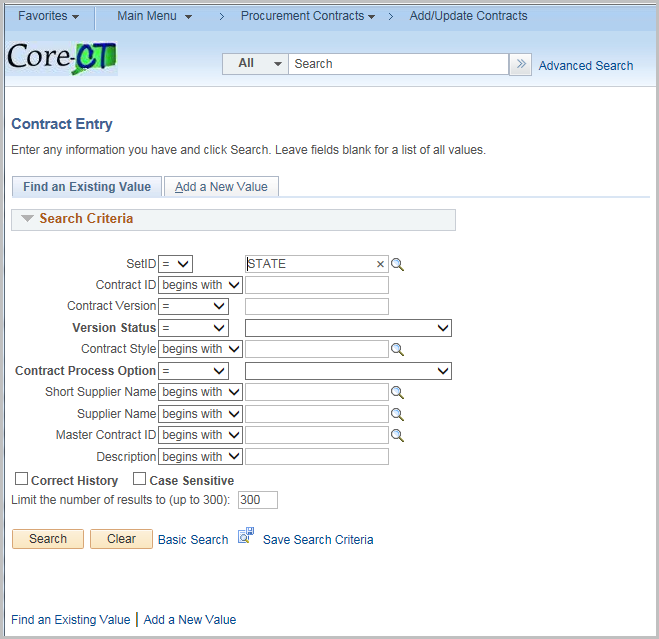
(Navigation from the Go To Contract link when converting requisition to contract will also work)



Click **Find an Existing Value**

Enter the **Contract ID**

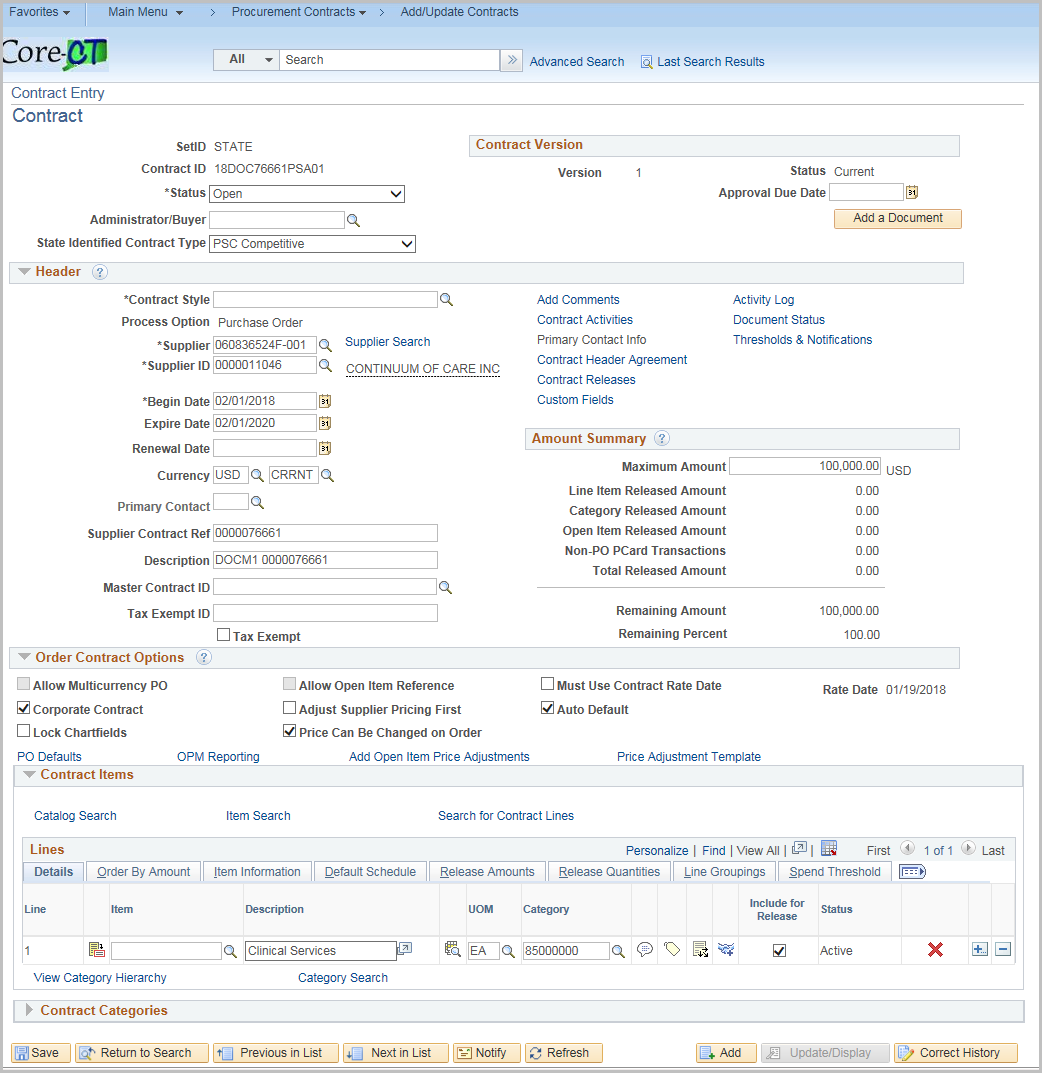
Click **Search**



Review and update any values as necessary for the particular contract

Below is a brief explanation of the fields created on the Contract

|  |  |
| --- | --- |
| Field | Value |
| Status | Defaults to Open |
| Administrator/Buyer | Enter the Contract Administrator - Optional |
| State Identified Contract Type | Defaults from the Requisition |
| Contract Style | Select PO |
| Supplier | Defaults from the Requistion |
| Begin Date | Defaults from the Requistion |
| Expire Date | Defaults from the Requistion |
| Supplier Contract Ref | Defaults from the Requistion |
| Description | Defaults from the Requistion |
| Maximum Amount | Defaults from the Requistion |
| Corporate Contract | If checked, the contract can be used Statewide  Default is checked |
| Price Can be Changed on Order | If checked, the line amount may be modified on the purchase order  Default is checked |

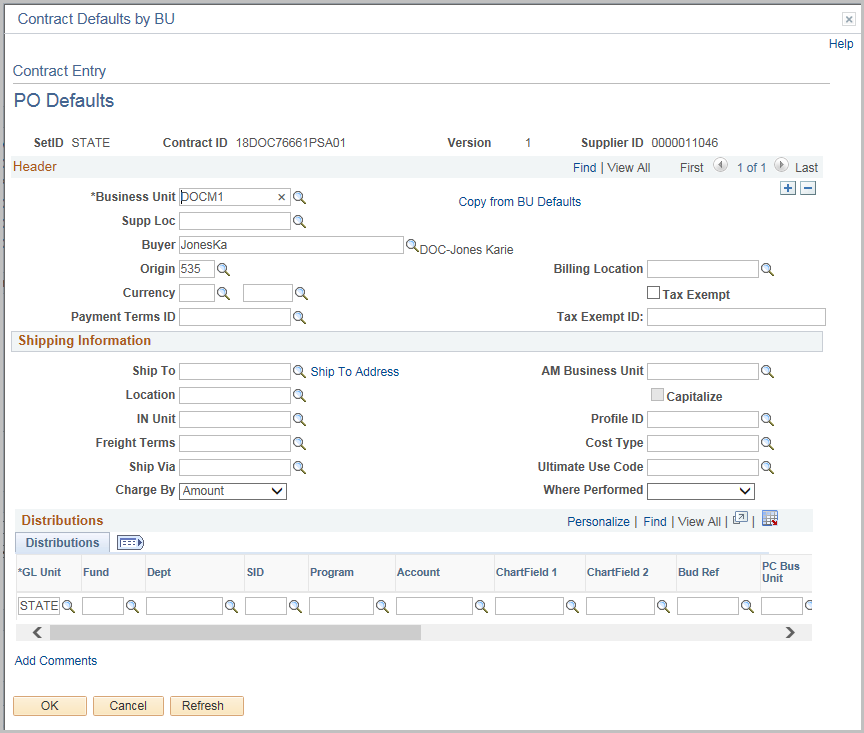


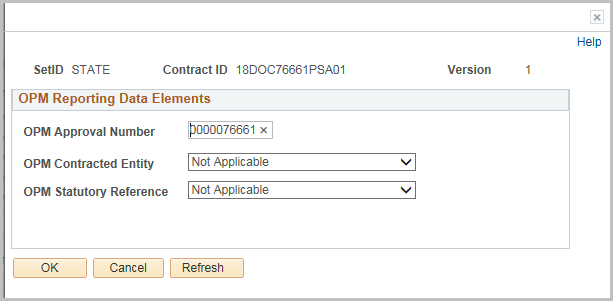
Click the **PO Defaults** hyperlink

Review and update any values as necessary for the particular contract

|  |  |
| --- | --- |
| Field | Value |
| Business Unit | Defaults from the Requistion  When the Corporate Contract checkbox is unchecked, this is the only Business Unit that can use this Contract. If more than one business unit is needed, click the + to add more. |
| Buyer | Defaults from the Requisition |
| Origin | Defaults from the Requisition |

Click **OK**



Click the **OPM Reporting Link** 

The OPM Approval Number is the Requisition number

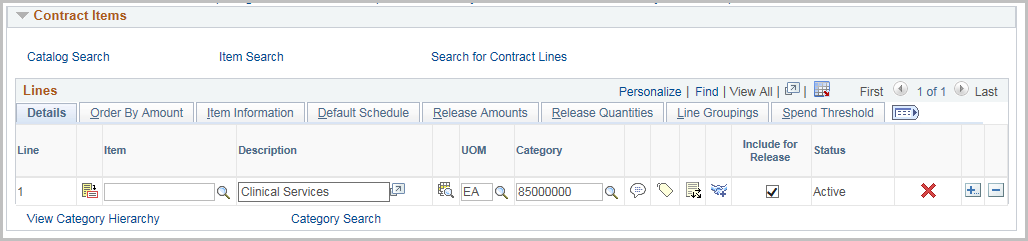
Update the OPM **Contracted Entity** and OPM **Statutory Reference** as needed.

Click **OK** (you will be returned to the Main Page of the Contract.)

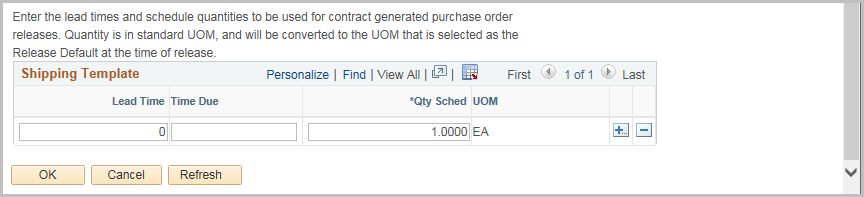
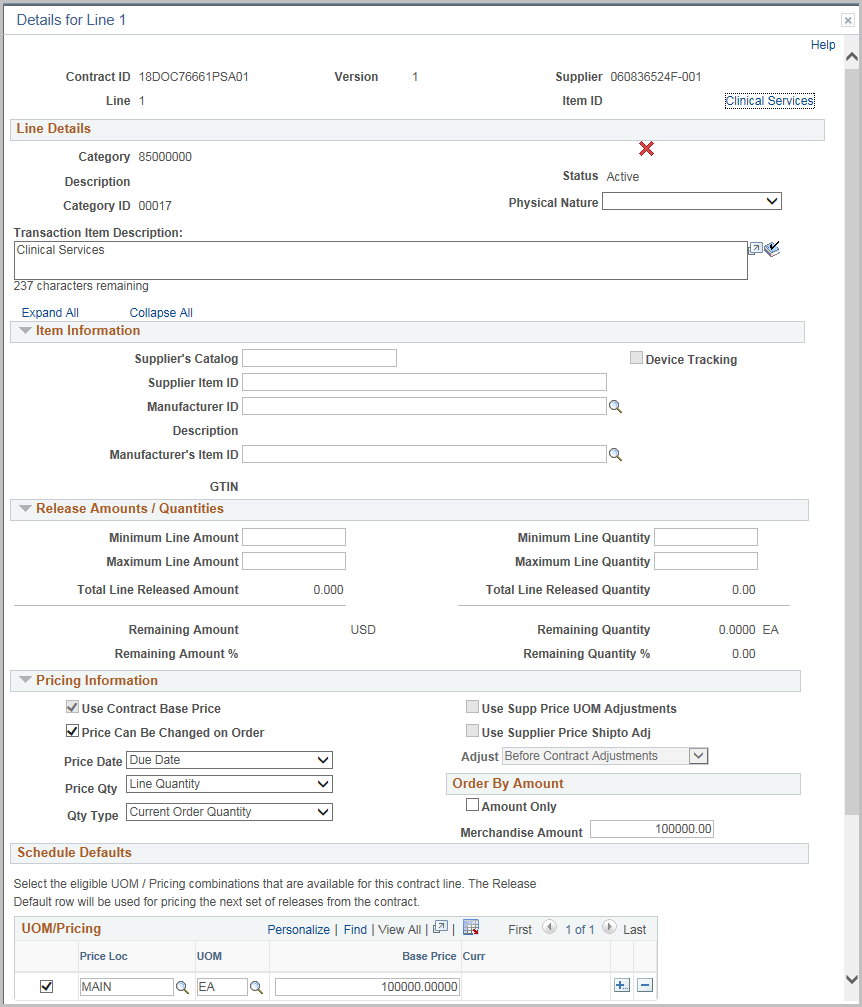
Contract Lines are defaulted from the Requistion

Click the Line Details Icon  to view Details for each line

Alternately you can Click the **Tab(s)** across the Top to view specific fields displaying all lines

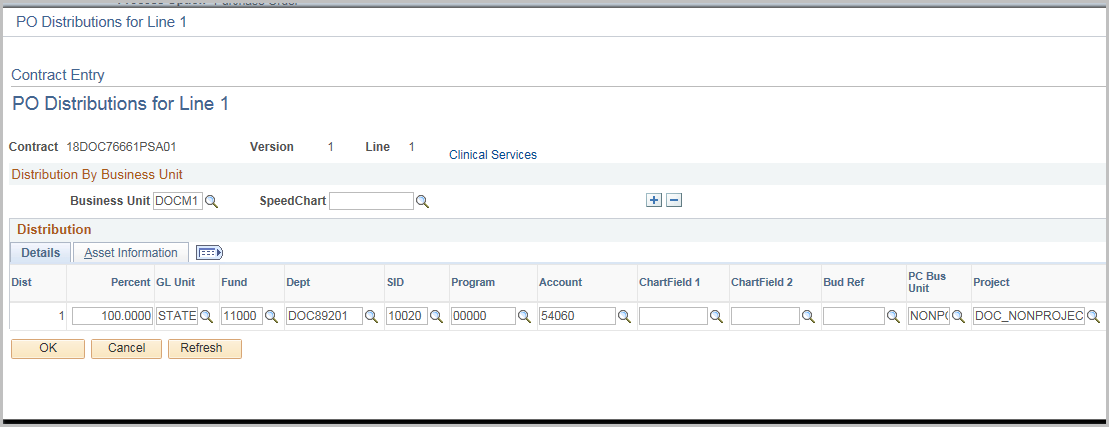


|  |  |
| --- | --- |
| Field | Value |
| Physical Nature | This value is defaulted from the requisition |
| Maximum Line Amount | Enter the Maximum amount for the Line  This is used to calculate the remaining balance |
| Price Can Be Changed on Order | Default is Checked |
| Amount Only | This defaults from the requisition |



Click OK

Click the PO Distibution Details icon 

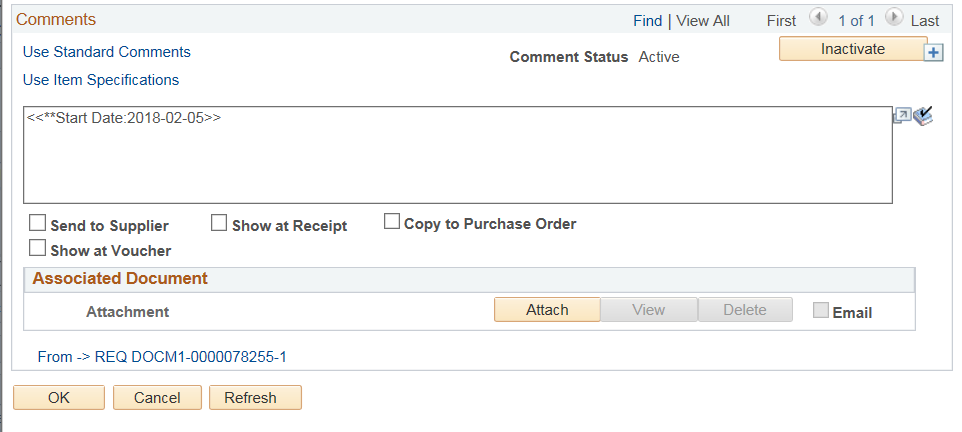


The PO Distributions are copied over from the Requistion

Click OK

Comments and Attachments will copy over from the Requisition

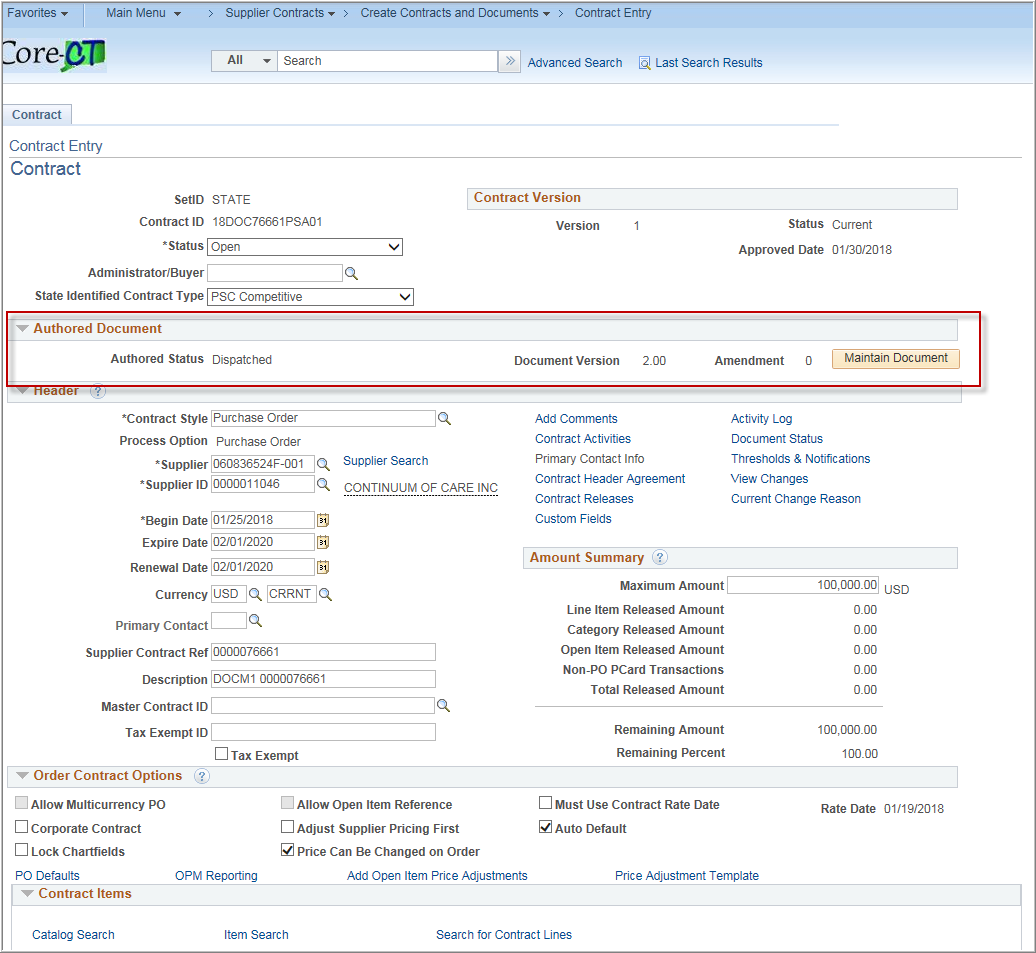
You can see what requisition was used to create the contract in the comments for the line and can view the requistion Schedule and Distribution line summary page by clicking on the link.



Once the Supplier Contract process has begun the Procurement Contract will update the corresponding Supplier Contract Status/Version/Amendment.

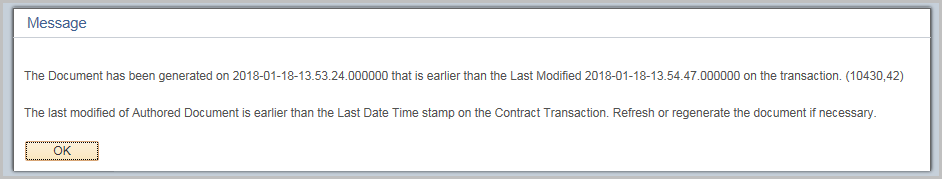
**Until the Contract authored status is executed (i.e. the legal document is complete and signed off) the contract should remain in Open Status.**

This will prevent creating purchase orders against the Contract.



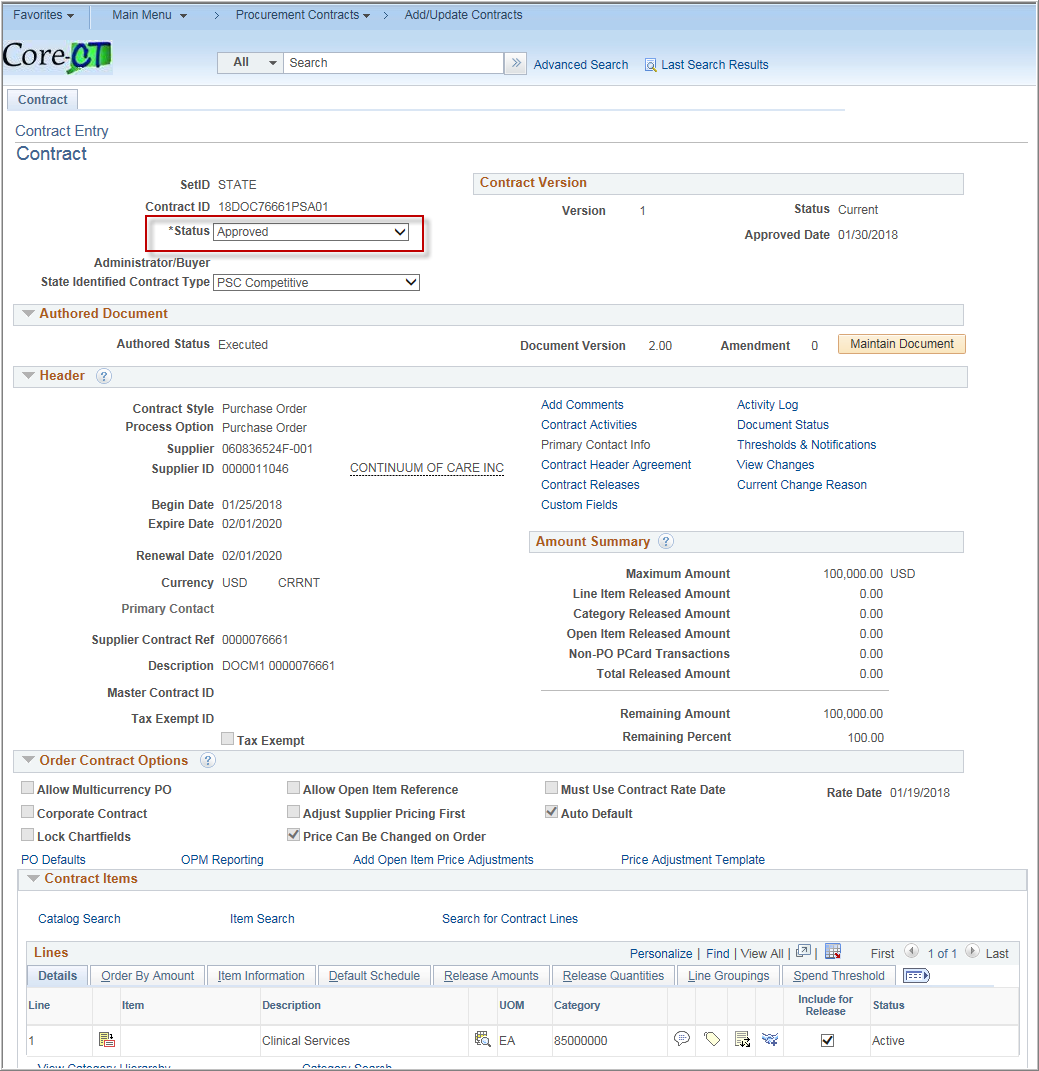
Update the Contract Status to Approved once the Supplier contract portion is completed

**Security Note**: User must have the Approve Contracts check box checked in their User Preferences to Approve contracts



Click OK and Save the Contract

Purchase Orders may now be created using this contract.

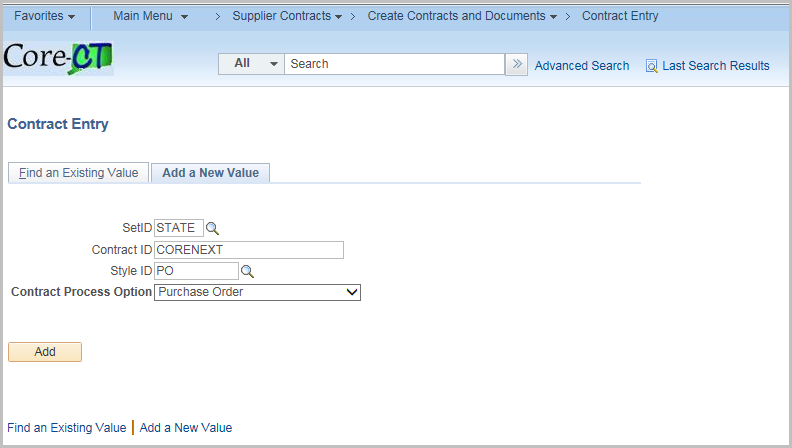


**Thresholds & Notifications**

**Navigation**: 1. Supplier Contracts > Create Contracts and Documents > Contract Entry

2. Procurement Contracts > Add/Update Contracts

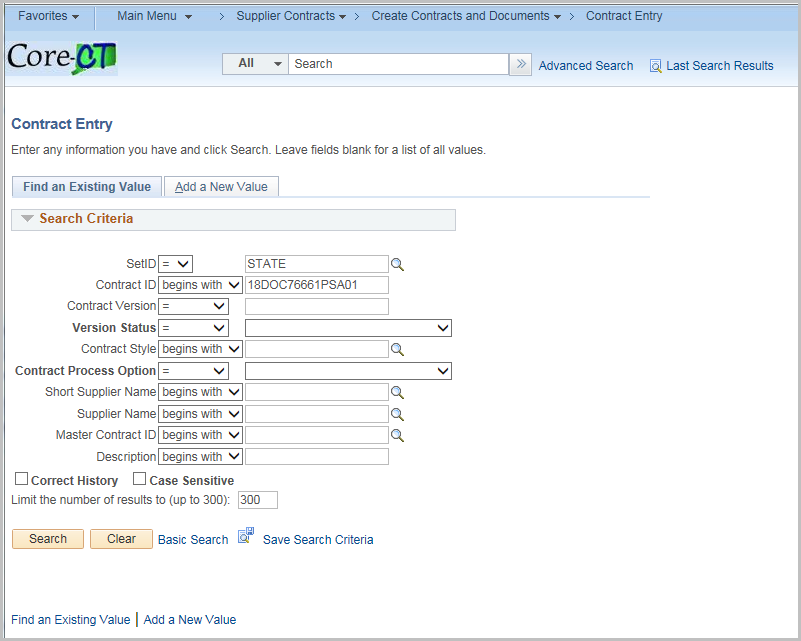
(either Navigation will work)



Click the Find an Existing Value Tab

Enter or Search for the Contract Id

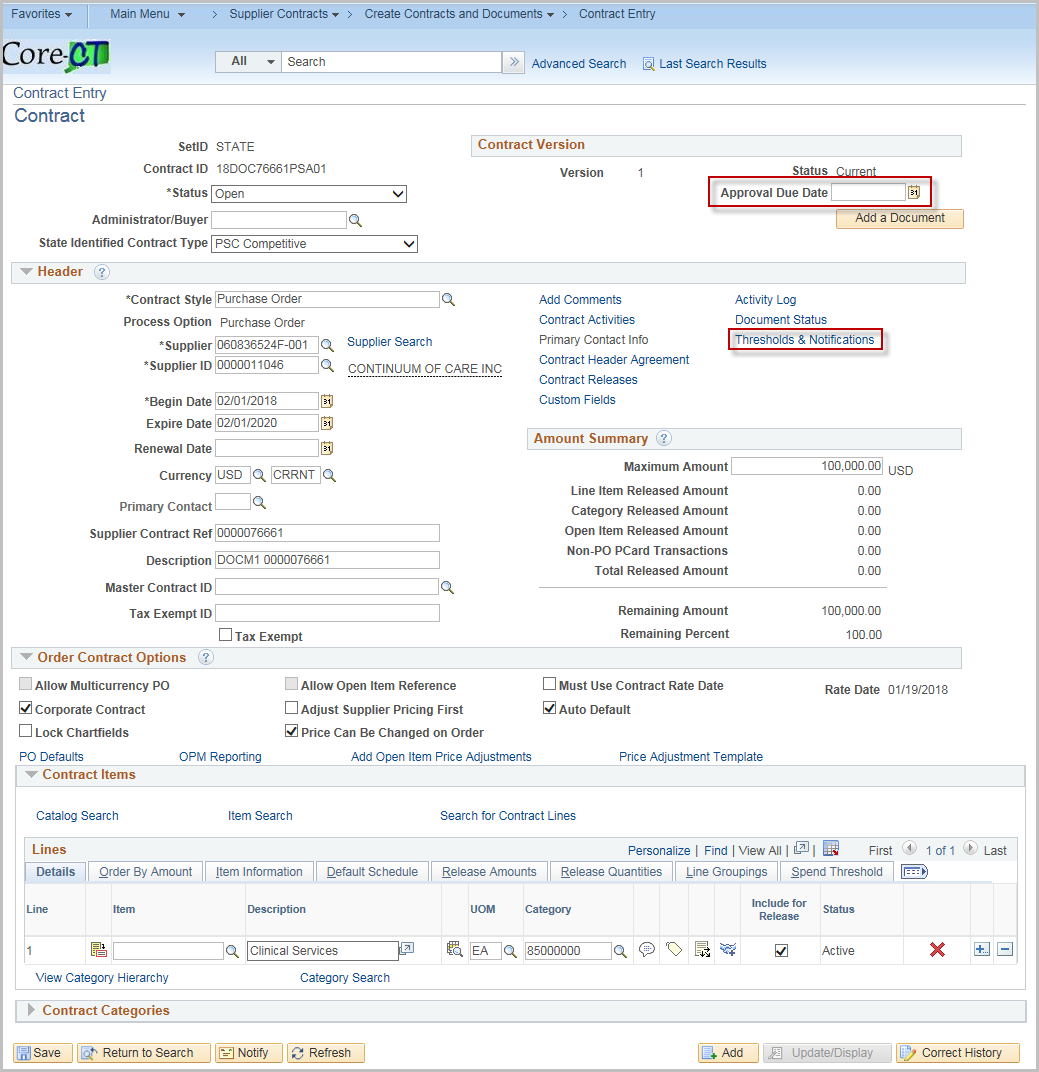
Click Search



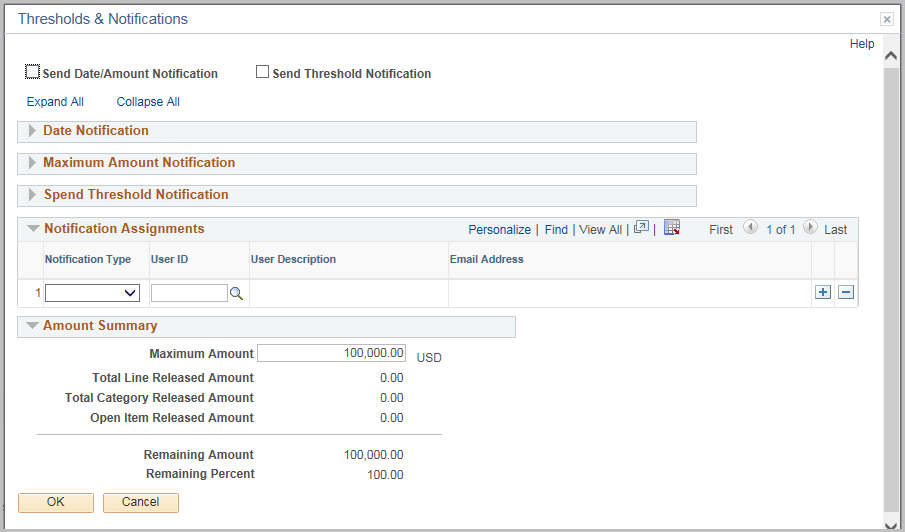
Notifications can be tied to the Approval Due Date.

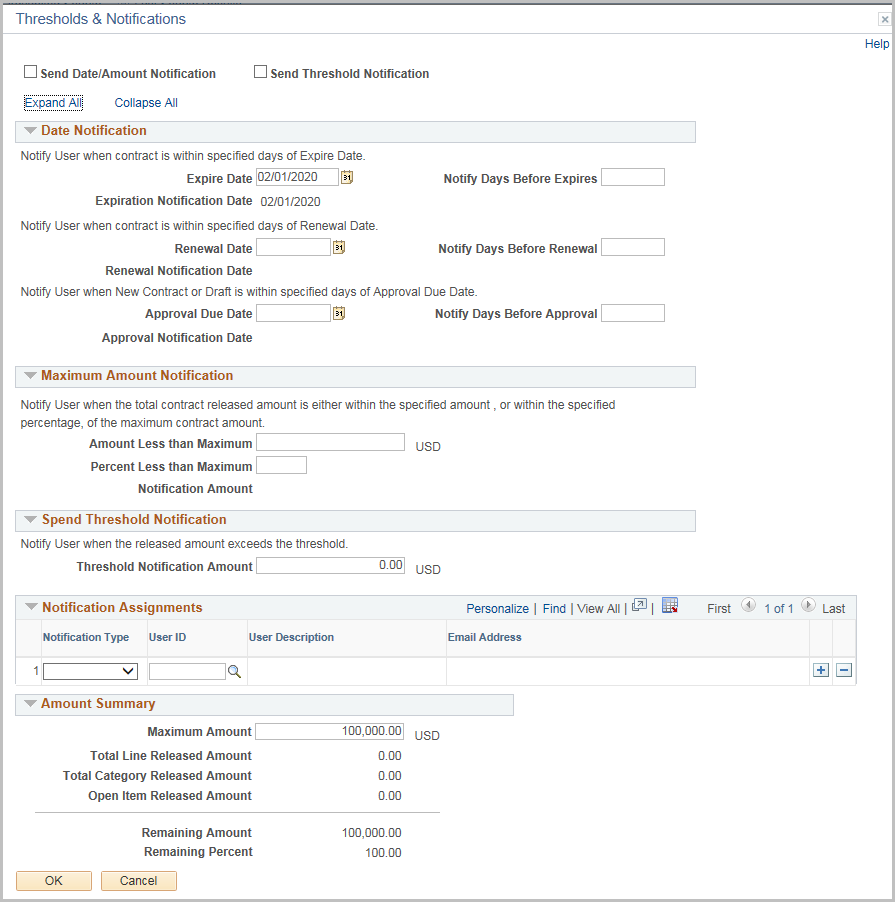
To use this, enter the Approval Due Date on the Contract.

Click the Thresholds & Notifications hyperlink



Click Expand All





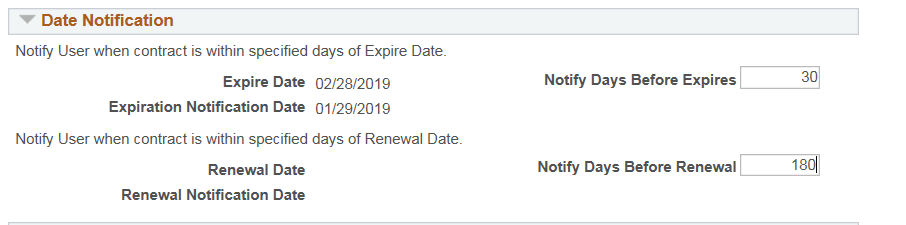
Complete the page based upon the types of threshold and notifications needed

|  |  |
| --- | --- |
| **Field** | **Value** |
| Send Date/Amount Notification | Select to notify when a Contract will expire or reaches the maximum amount |
| Send Threshold Notification | Select to notify when a contract reaches or exceeds a spend threshold |

**Date Notification**

|  |  |
| --- | --- |
| **Field** | **Value** |
| Expire Date | Defaults from the Contract Page |
| Notify Days Before Expires | Enter the number of days before to send notification |
| Renewal Date | Defaults from the Contract Page |
| Notify Days Before Renewal | Enter the number of days before to send notification |

\*In each case the system will calculate and display the notification date

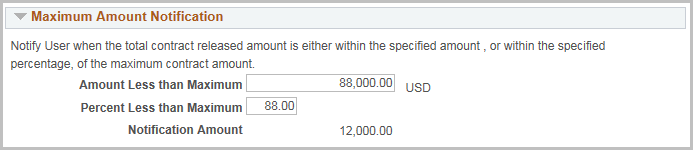


**Note**: Updating any of these days on the notification page will update the values on the Contract

**Maximum Amount Notification**

|  |  |
| --- | --- |
| **Field** | **Value** |
| Amount Less than Maximum | Enter a value below the maximum to send a notification  Entering an amount will automatically calculate the percentage |
| Percent Less than Maximum | Enter a percentage below the maximum to send a notification  Entering a percentage will automatically calculate the amount |

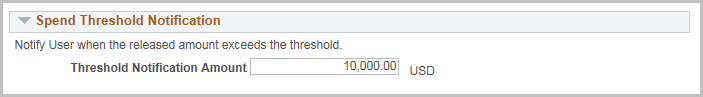
\*Once entered, the system will calculate and display the notification amount



**Spend Threshold Notification**

|  |  |
| --- | --- |
| **Field** | **Value** |
| Threshold Notification Amount | Enter a value to send a notification |

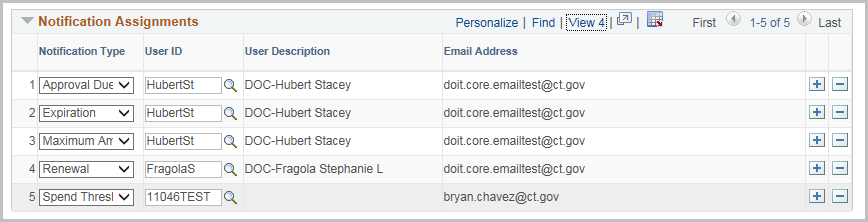
\*This will apply to each line on the contract



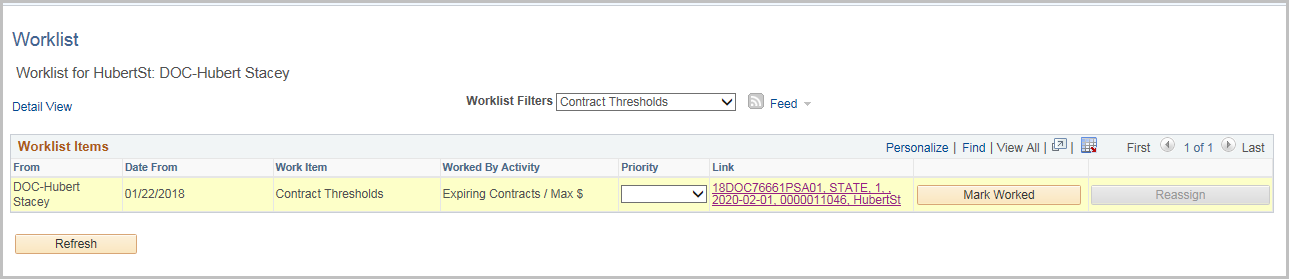
**Notification Assignments**

|  |  |
| --- | --- |
| **Field** | **Value** |
| Notification Type | Drop down of available notifications |
| User ID | Select from valid user ids (internal and supplier will use email on profile) |

To add multiple users click the +



When a threshold is met, an email is generated and in the worklist



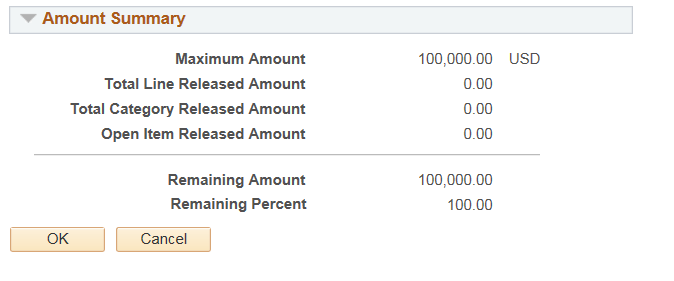
Sample E-mail



Notifications also appear in the Worklist

**Amount Summary**

These fields are populated based on the transactions against the contract. This section is also displayed on the Contract Entry page.



Click OK and return to the Contract Entry page.