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 ID 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.

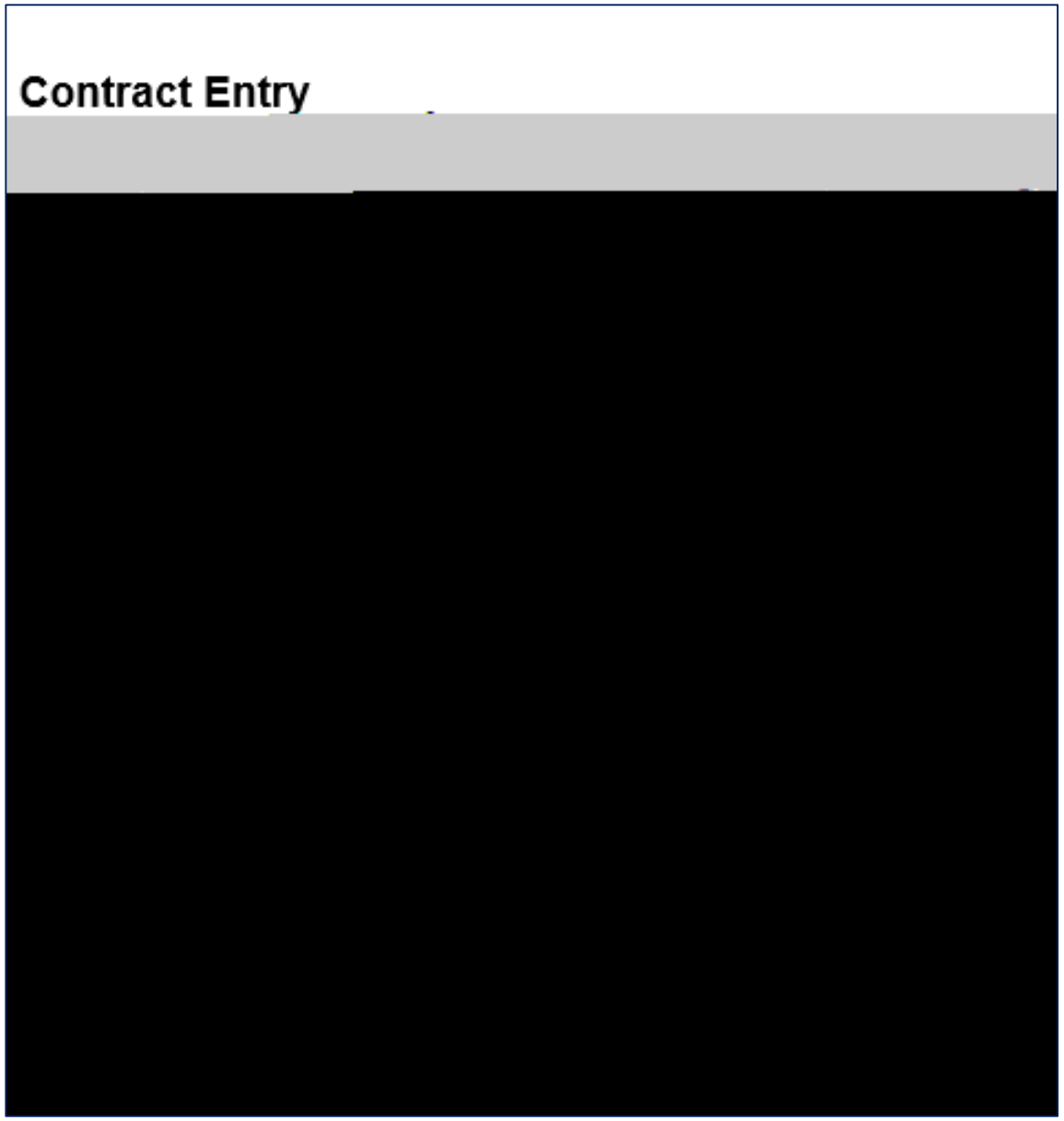
Procurement Contracts

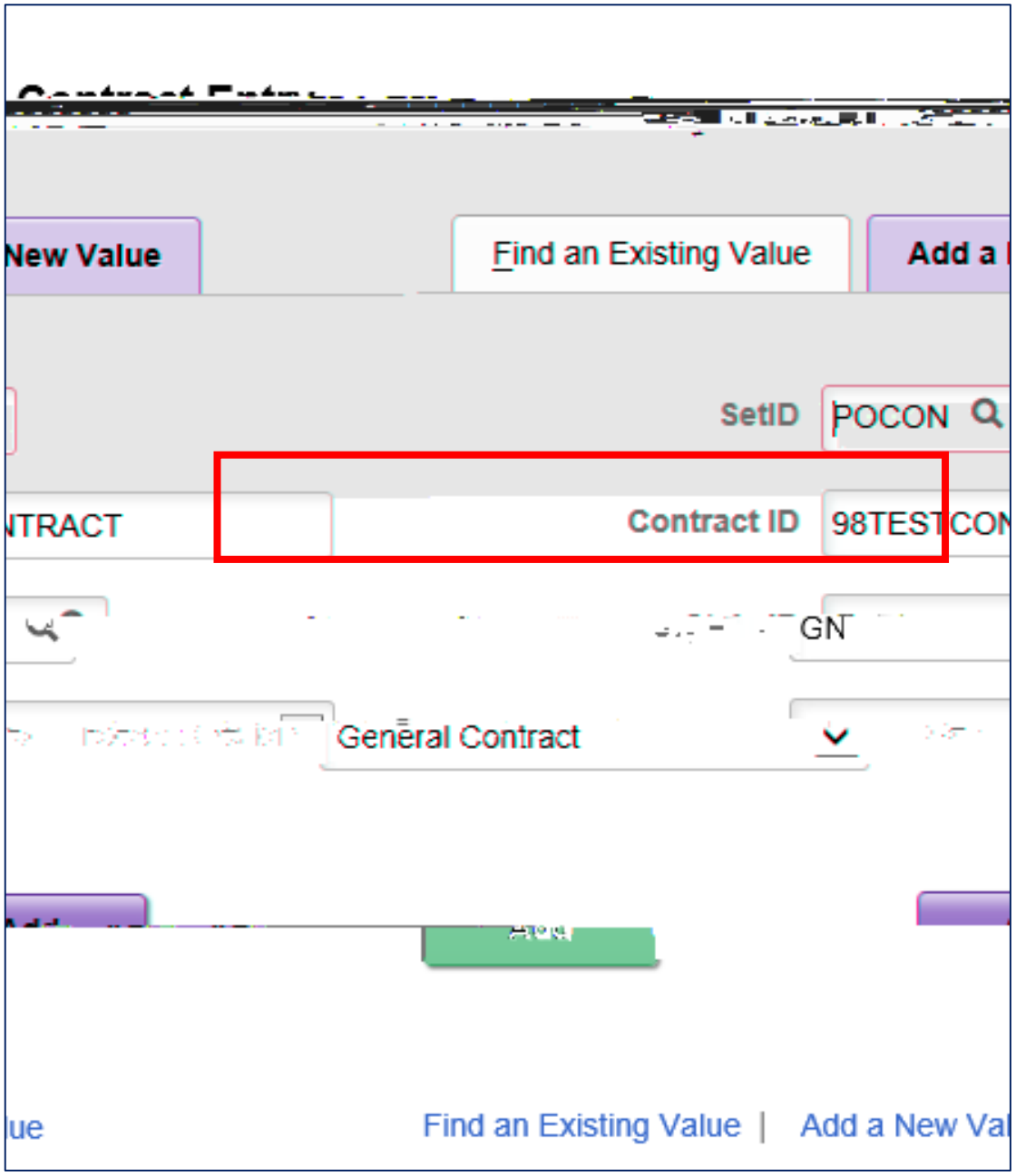
Security Roles & User Preferences

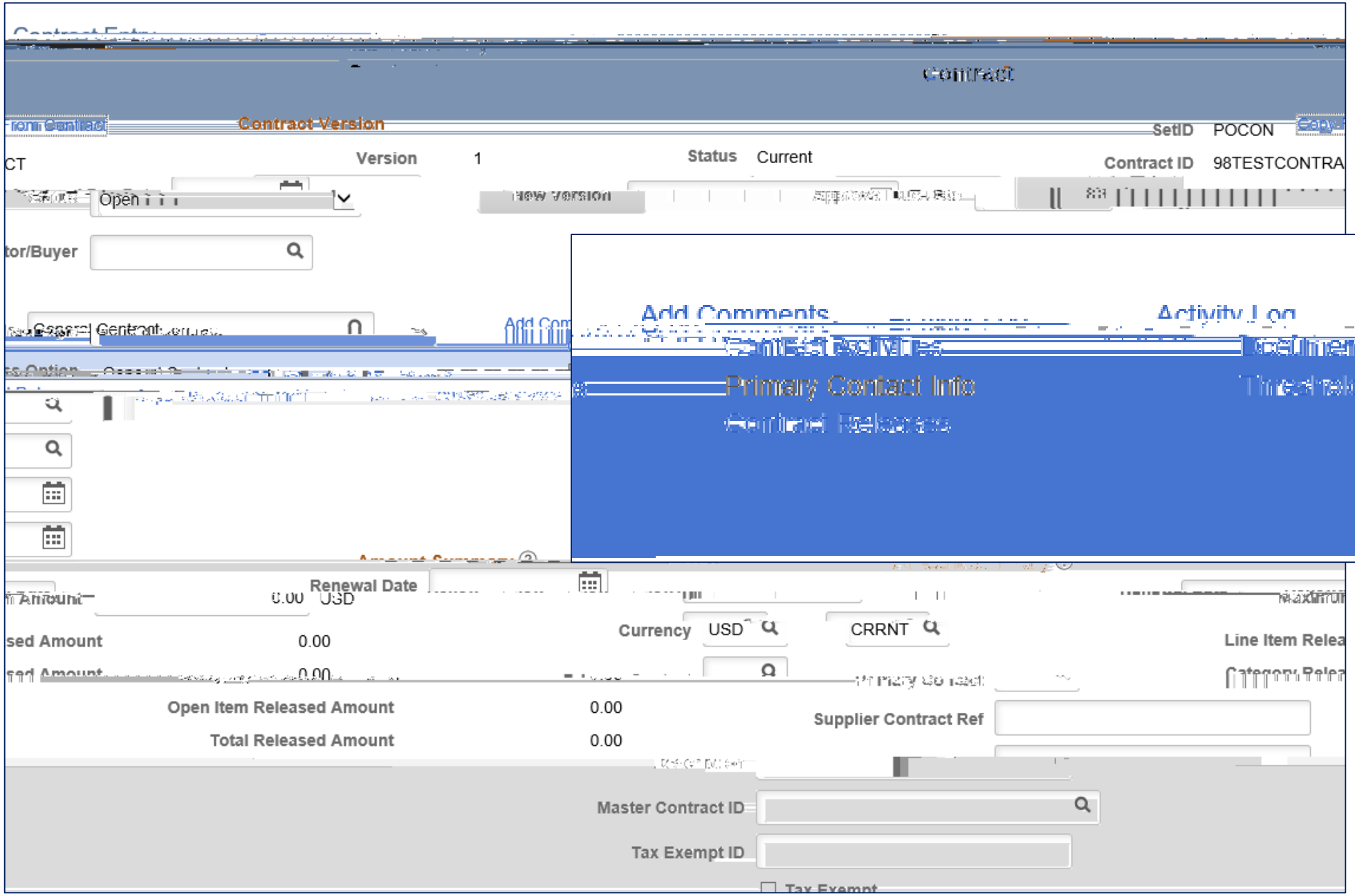
- Roles:
  - BOR_PO_CONTRACT_ADMIN – Contract Administrator
  - BOR_PO_CONTRACT_INQUIRY – Those who need inquiry access for Procurement Contracts
  - BOR_PO_CONTRACT_REPORTS – Those who need access to reports

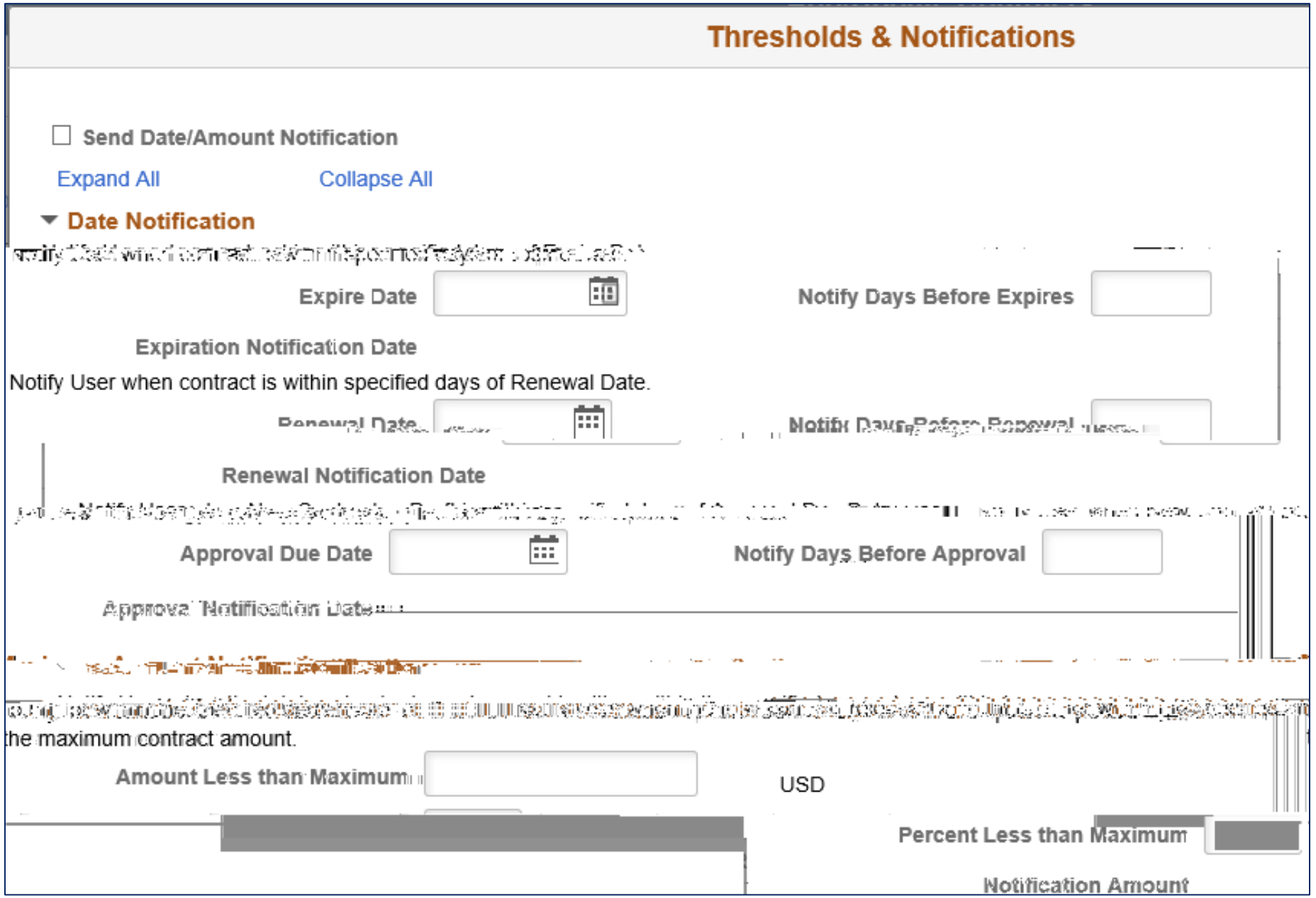
- User Preferences:
  - Procurement link > Contract Process link – here you will define default options as well as the type of action a Contract Admin can take

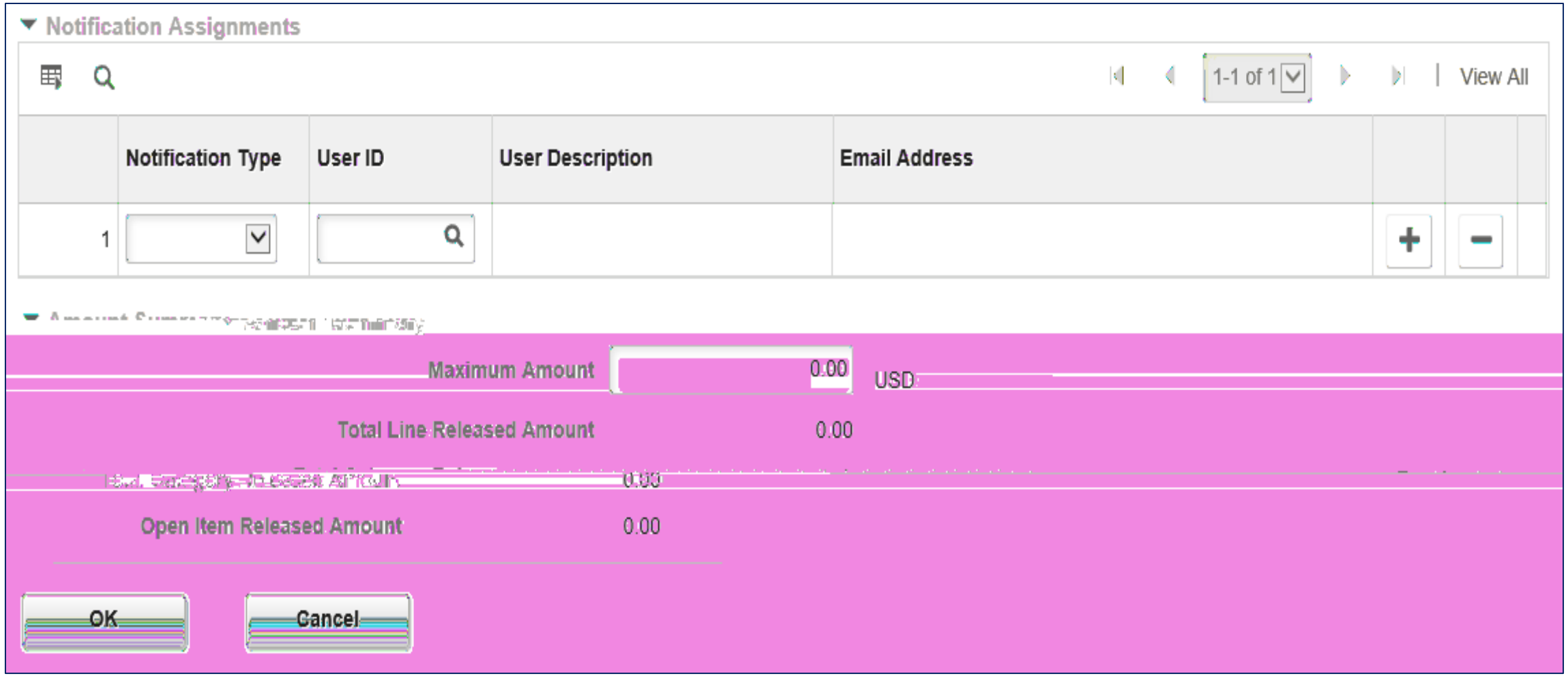
Contract Entry

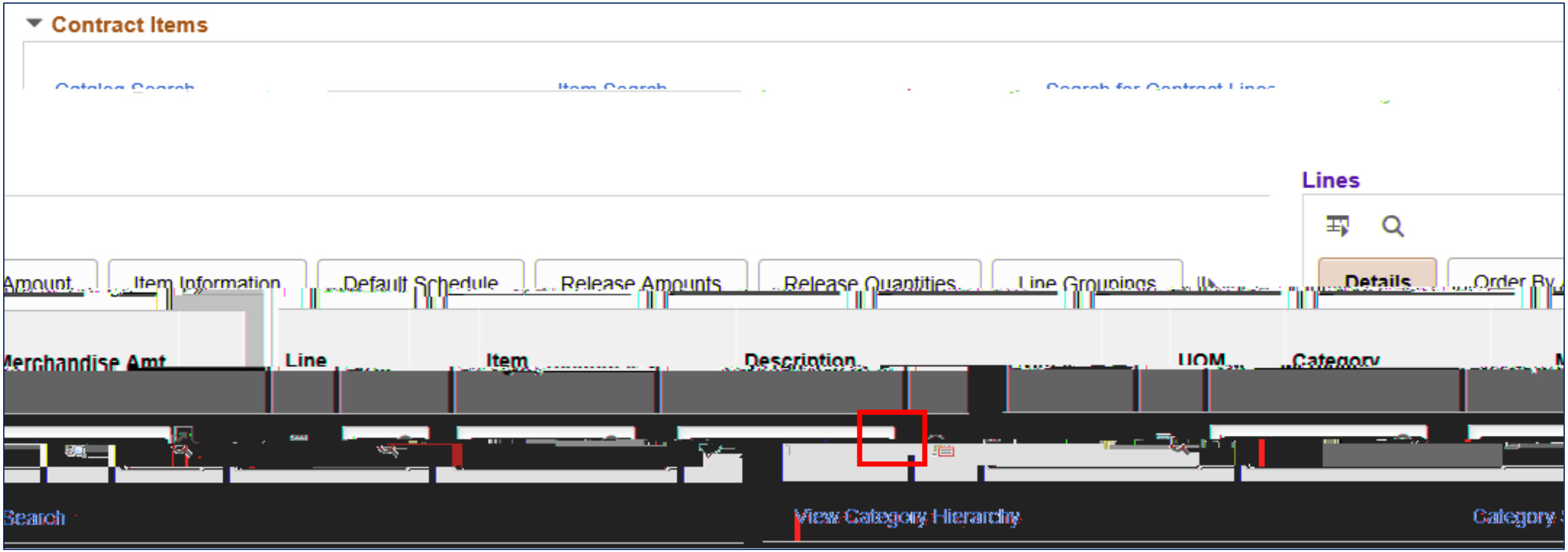


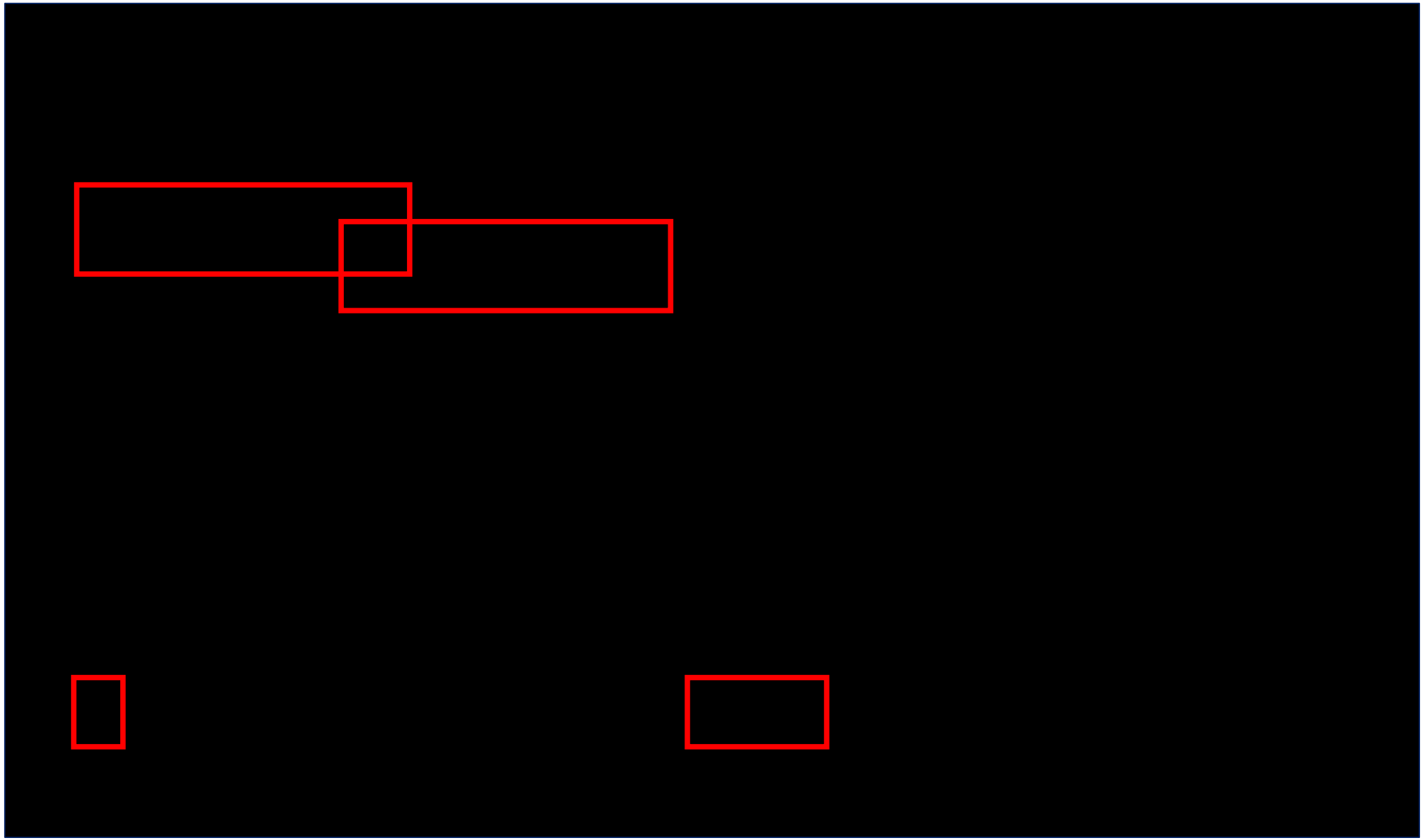

New Value
Find an Existing Value
Add a
SetID
POCON
NTRACT
Contract ID
98TEST CON
GN
General Contract
lue
Find an Existing Value | Add a New Val

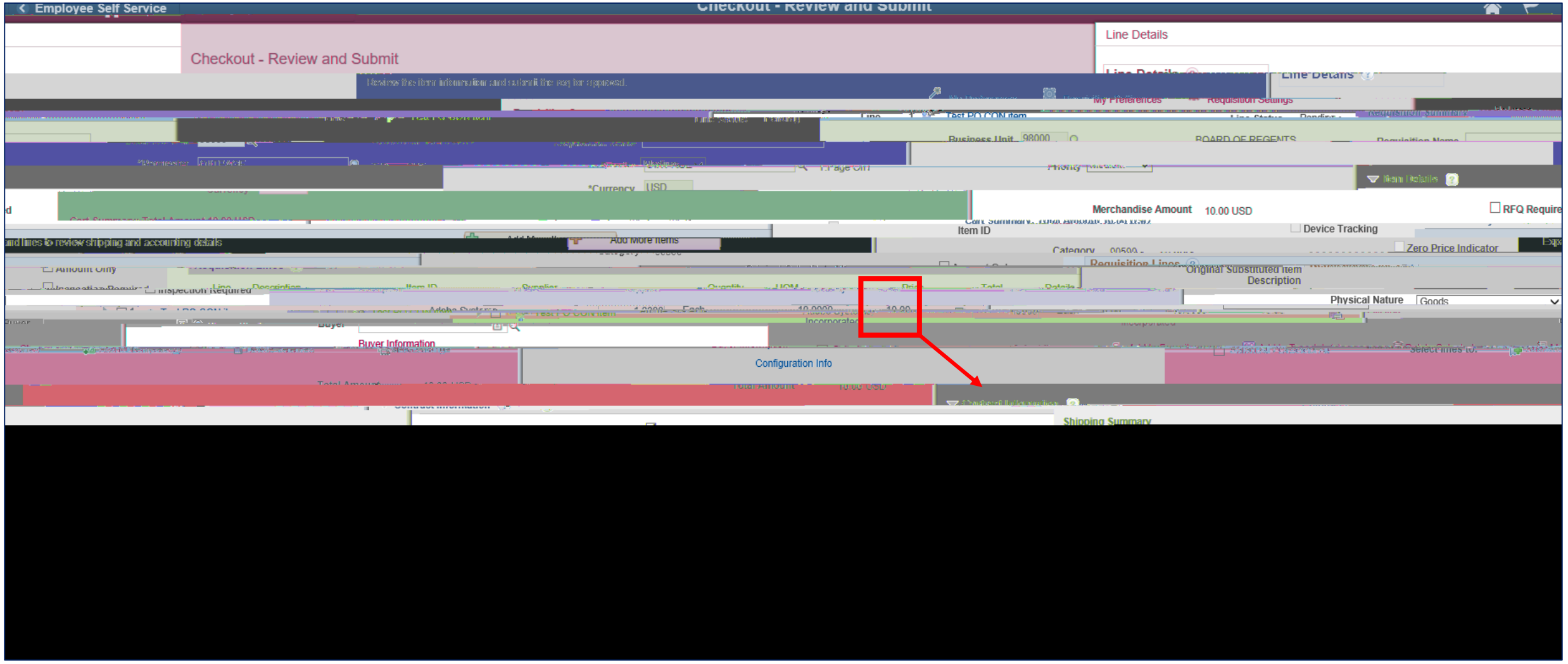

Contract
Contract Version
SetID POCON
Version 1
Status Current
Contract ID 98TESTCONTRA
Open
New Version
Add Comments
Activity Log
Primary Contact Info
Renewal Date
0.00 USD
Currency USD
CRRNT
0.00
Open Item Released Amount 0.00
Total Released Amount 0.00
Supplier Contract Ref
Master Contract ID
Tax Exempt ID
Tax Exempt

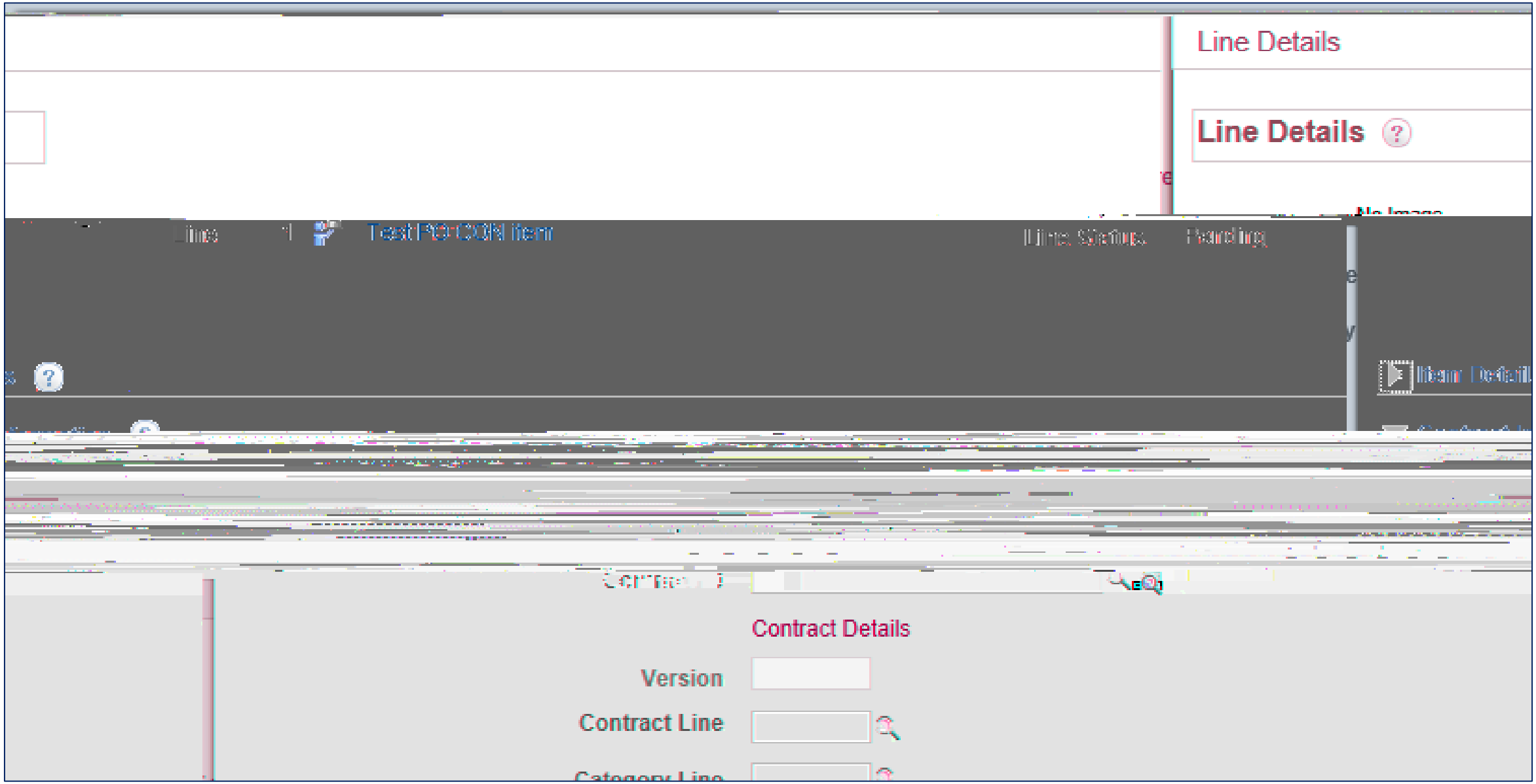

Thresholds & Notifications
Send Date/Amount Notification
Expand All
Collapse All
Date Notification
Expire Date
Notify Days Before Expires
Expiration Notification Date
Notify User when contract is within specified days of Renewal Date.
Renewal Date
Renewal Notification Date
Approval Due Date
Notify Days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

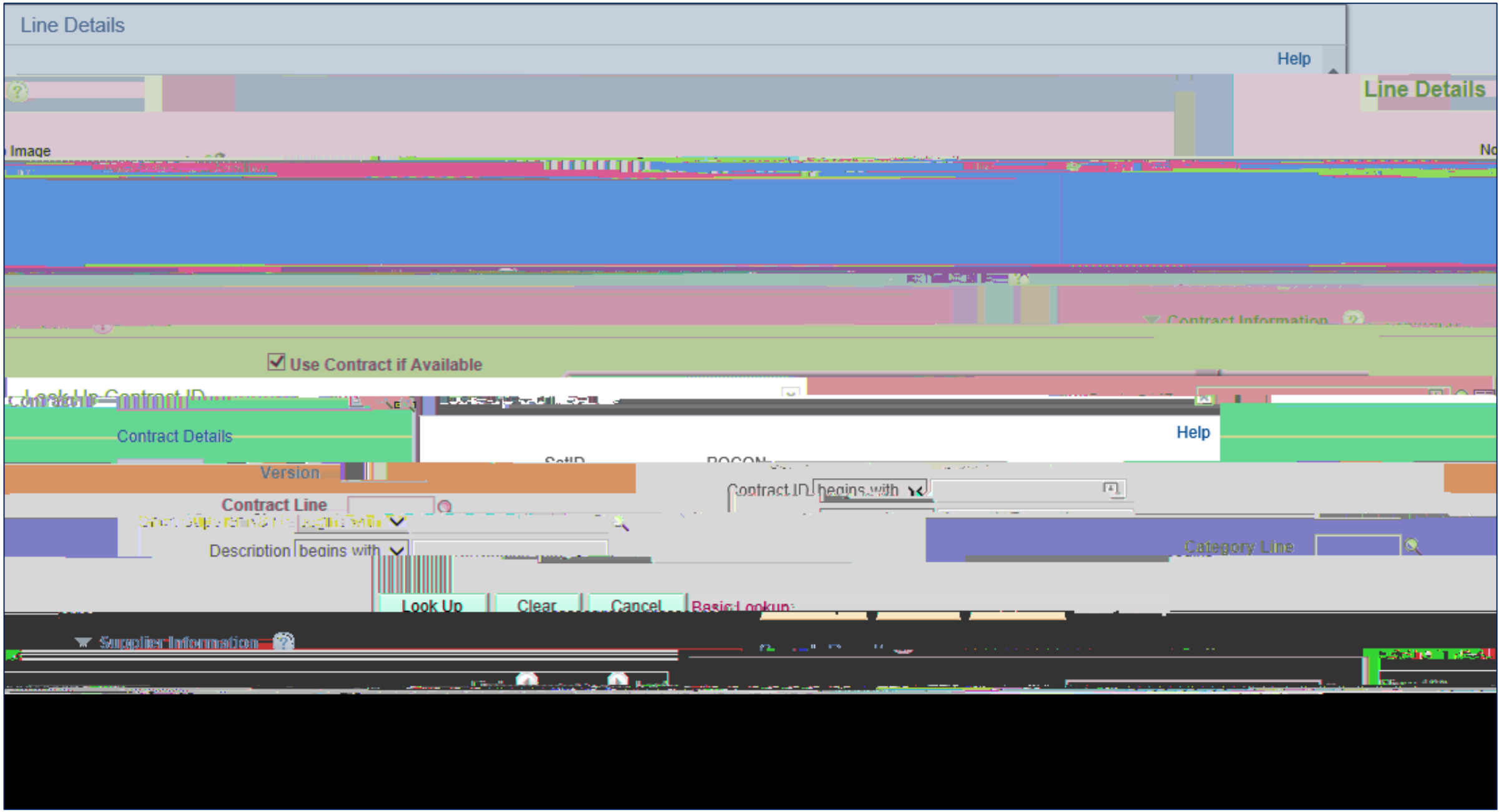

Notification Assignments
1-1 of 1
View All
Notification Type
User ID
User Description
Email Address
1
Maximum Amount
0.00
USD
Total Line Released Amount
0.00
Open Item Released Amount
0.00
OK
Cancel

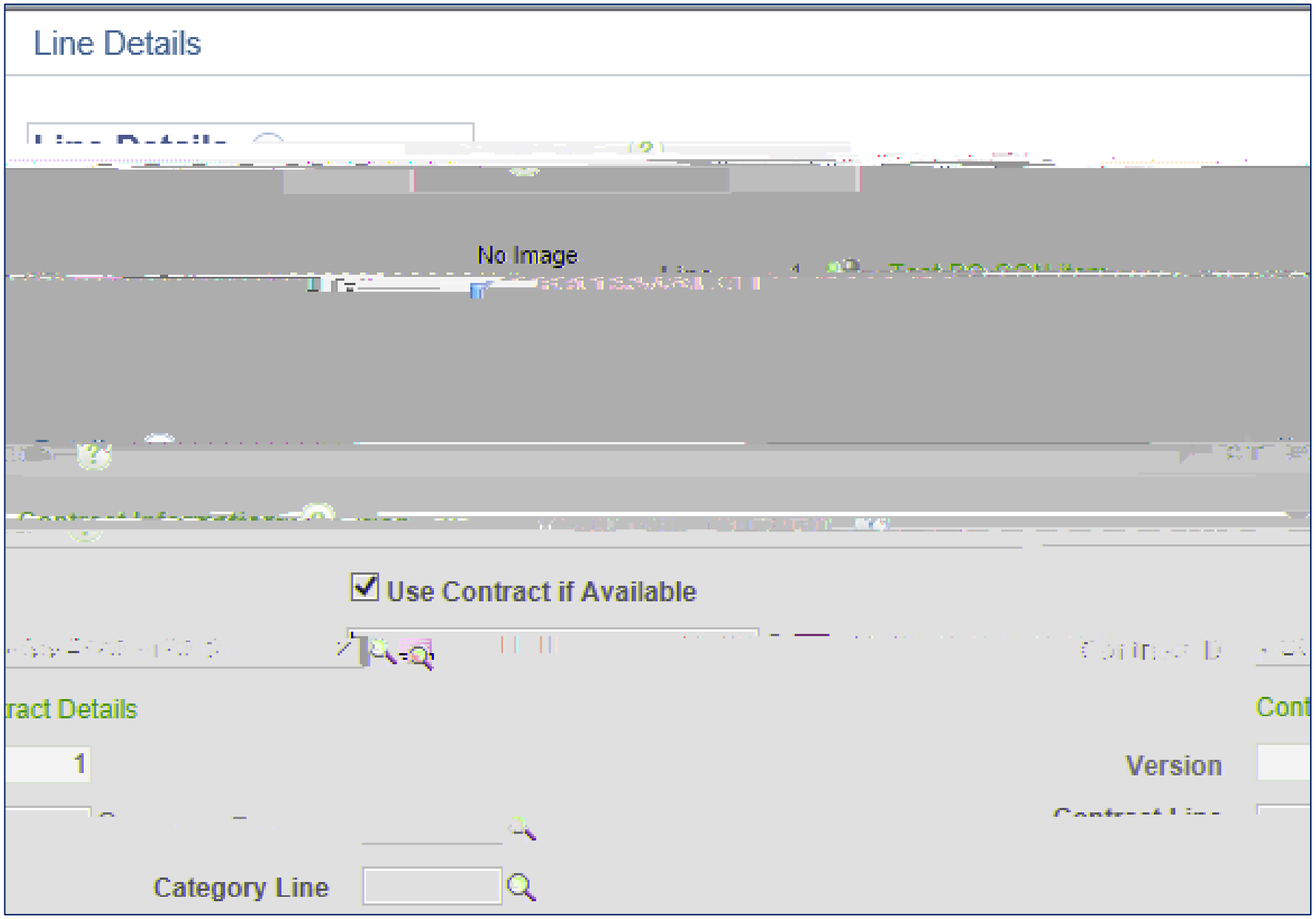

Contract Items
Lines
Amount
Item Information
Default Schedule
Release Amounts
Release Quantities
Line Groupings
Details
Order By
Merchandise Amt
Line
Item
Description
UOM
Category
Search
View Category Hierarchy
Category

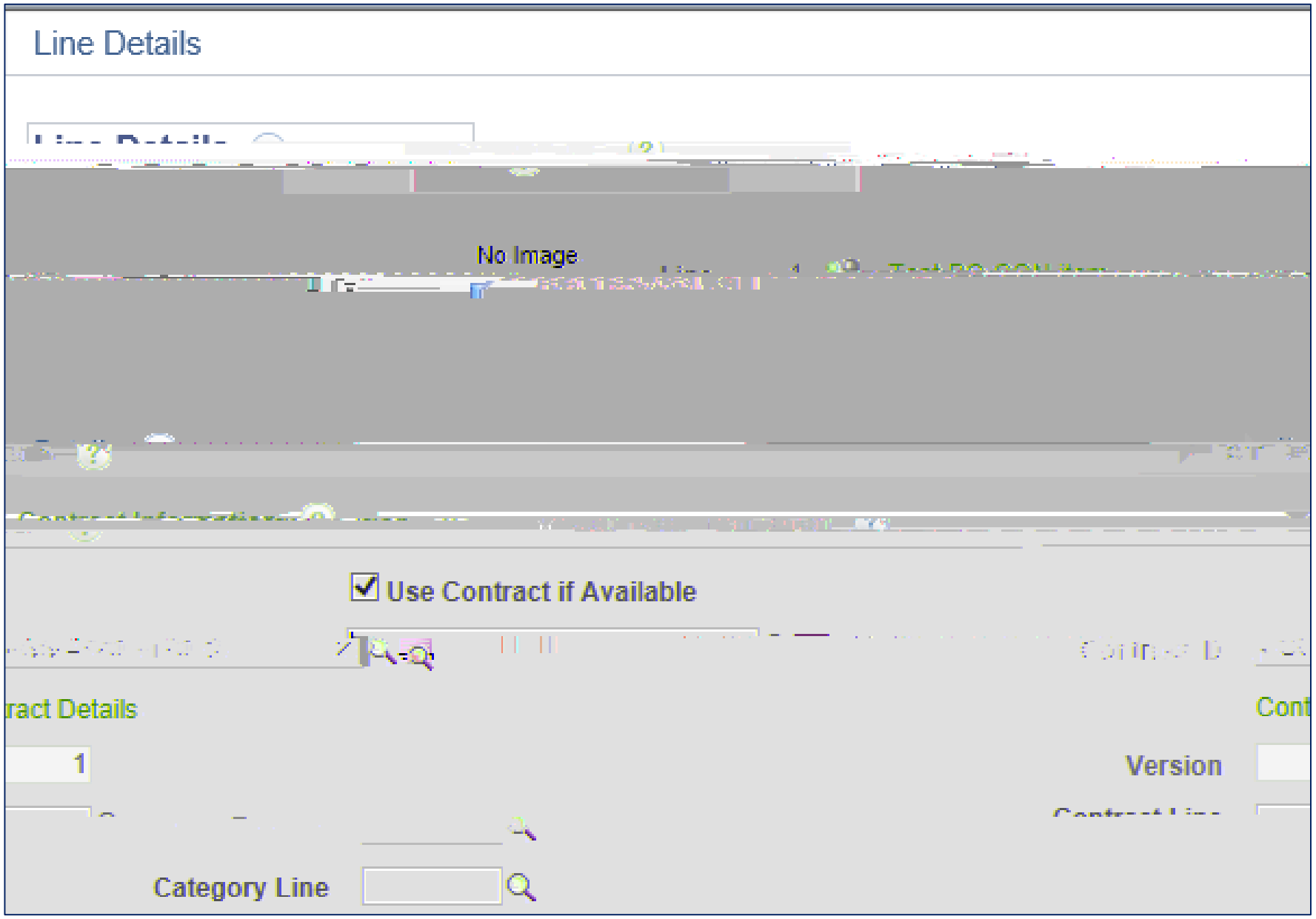



Employee Self Service
Checkout - Review and Submit
Line Details
Merchandise Amount
10.00 USD
Item ID
Device Tracking
Zero Price Indicator
Original Substituted Item Description
Physical Nature
Goods
Buyer Information
Configuration Info
Shipping Summary

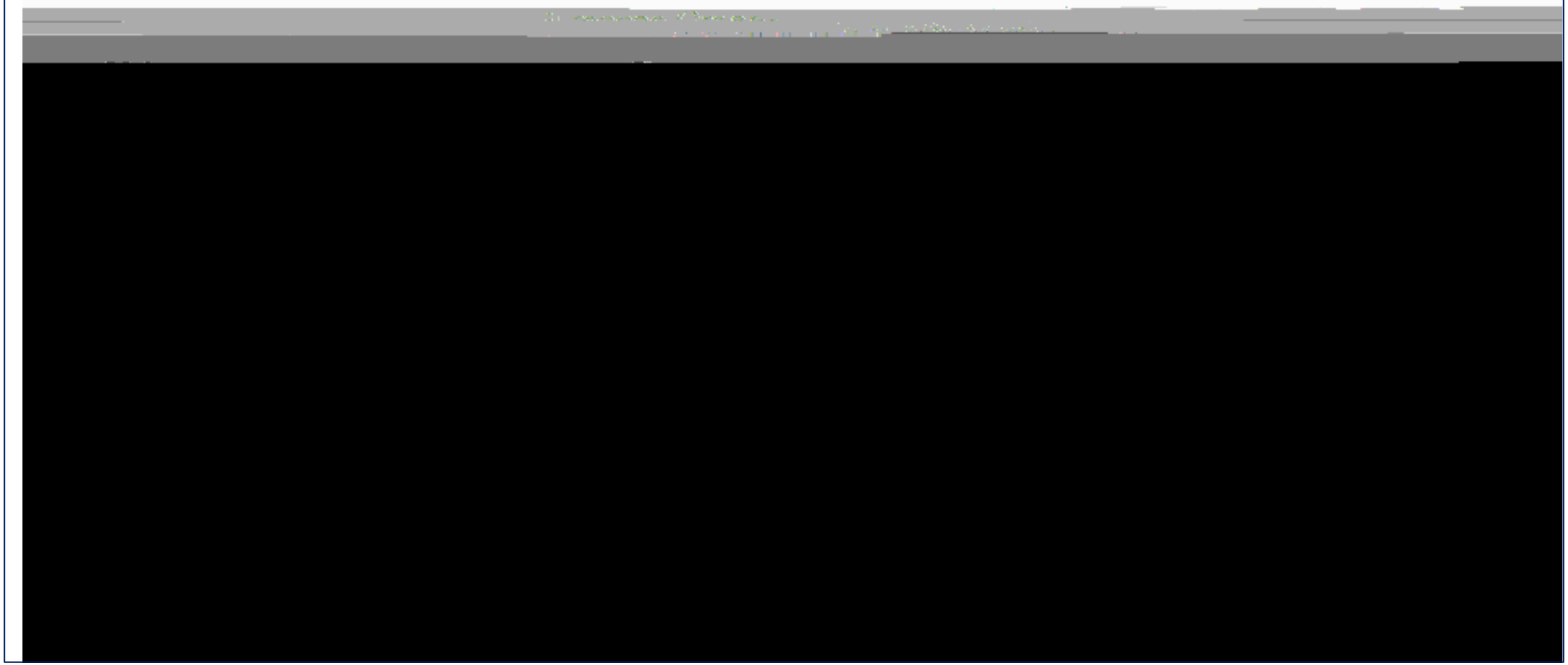

Line Details
Line Details
Test PO CON item
Item Detail
Contract Details
Version
Contract Line

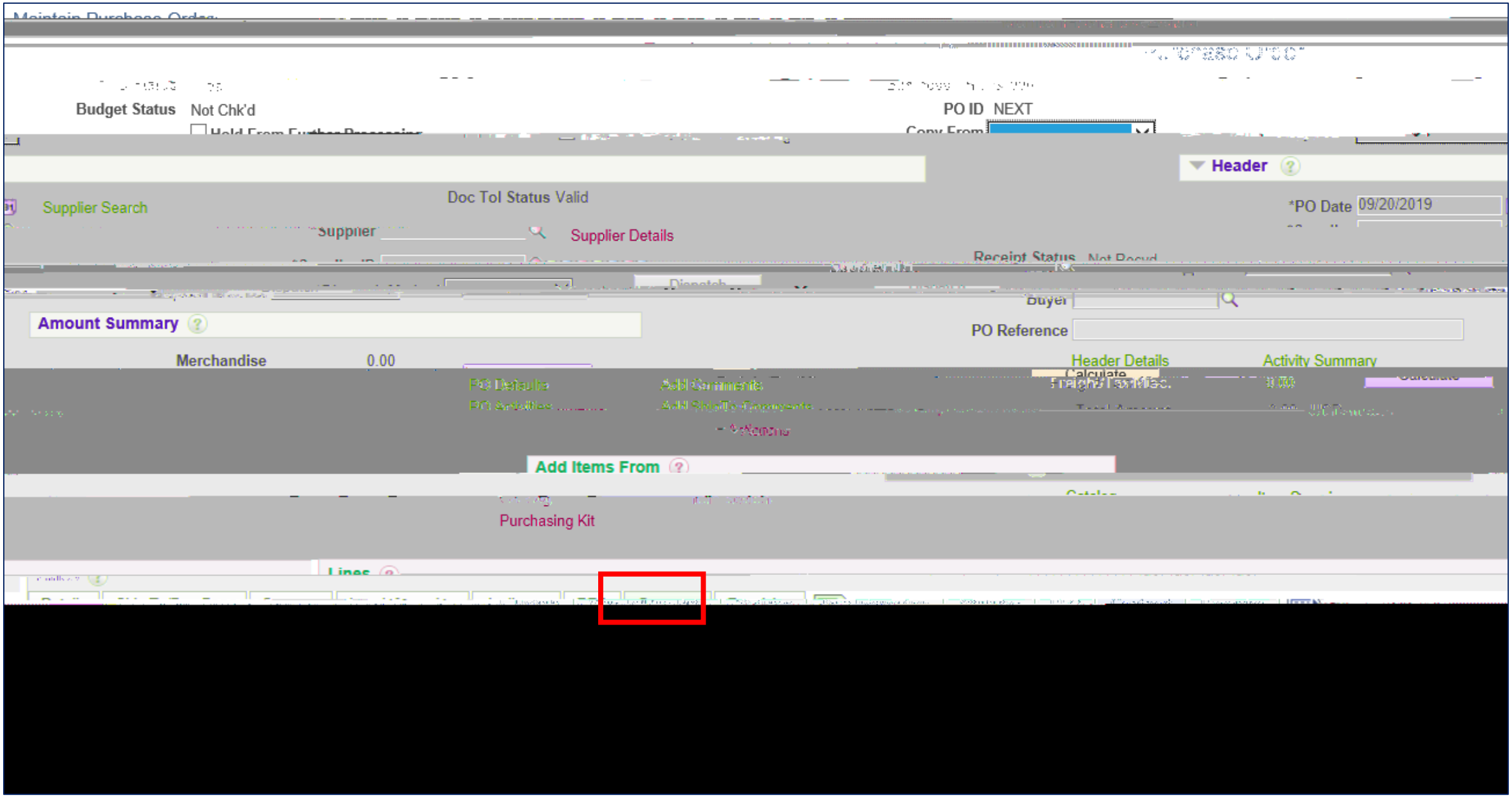

Line Details
Help
Line Details
Image
Contract Information
Use Contract if Available
Contract Details
Help
Version
Contract Line
Description begins with
Contract ID begins with
Category Line
Look Up
Clear
Cancel
Basic Lookup
Supplier Information

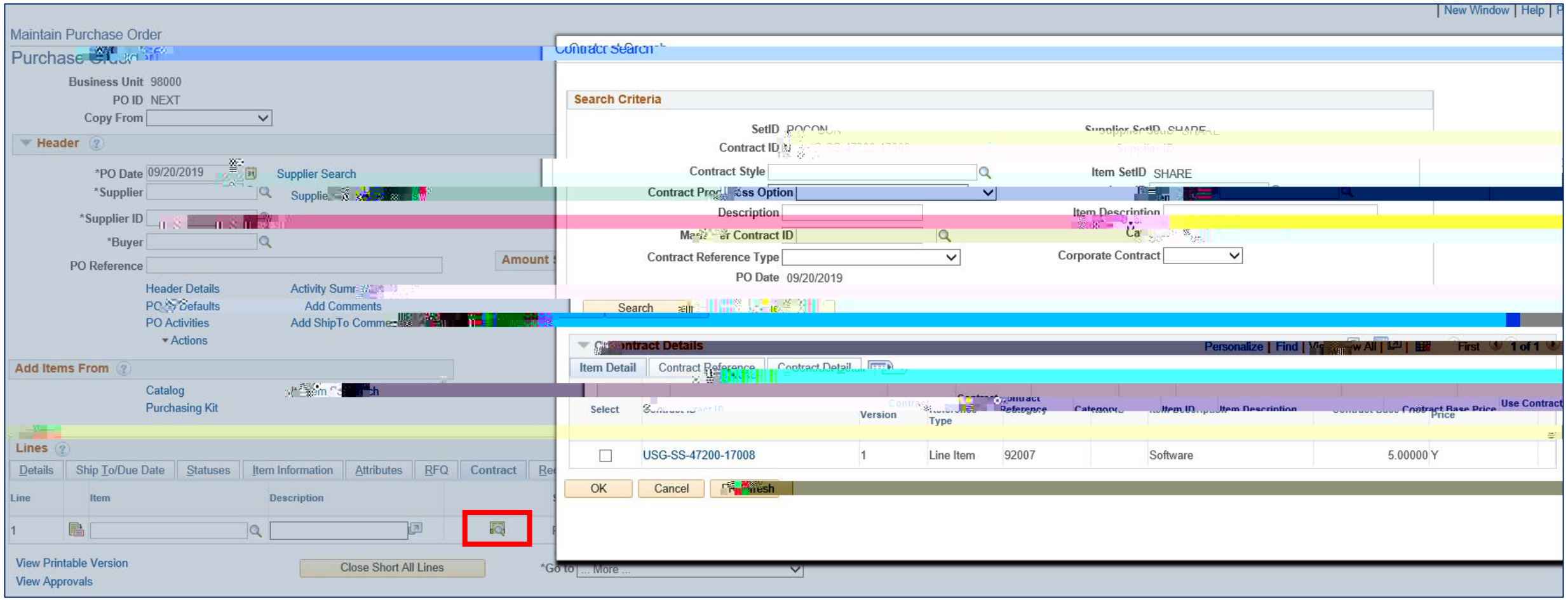

Line Details
No Image
Use Contract if Available
ract Details
1
Version
Category Line


Line Details
No Image
Use Contract if Available
ract Details
1
Version
Category Line

Maintain Purchase Order




Budget Status Not Chk'd
PO ID NEXT
Header
Supplier Search
Doc Tol Status Valid
*PO Date 09/20/2019
Supplier
Supplier Details
Receipt Status Not Recvd
Buyer
Amount Summary
PO Reference
Merchandise 0.00
Header Details
Activity Summary
Add Items From
Purchasing Kit
Lines


New Window | Help
Maintain Purchase Order
Business Unit 98000
PO ID NEXT
Copy From
Header
*PO Date 09/20/2019
Supplier Search
*Supplier
*Supplier ID
*Buyer
PO Reference
Header Details
PO Defaults
PO Activities
Actions
Add Comments
Add Items From
Catalog
Purchasing Kit
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
Contract ID
Contract Style
Item SetID SHARE
Description
Item Description
Contract Reference Type
Corporate Contract
PO Date 09/20/2019
Search
Contract Details
Personalize | Find
First 1 of 1
Item Detail
Contract Reference
Contract Detail
Select
Version
Type
Item ID
Item Description
Price
Use Contract
USG-SS-47200-17008
1
Line Item
92007
Software
5.00000
Y
OK
Cancel

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?