

Subject: SRM Document Builder Dialog Question Change

Audience: AST Leads, Procurement Directors, Finance Directors

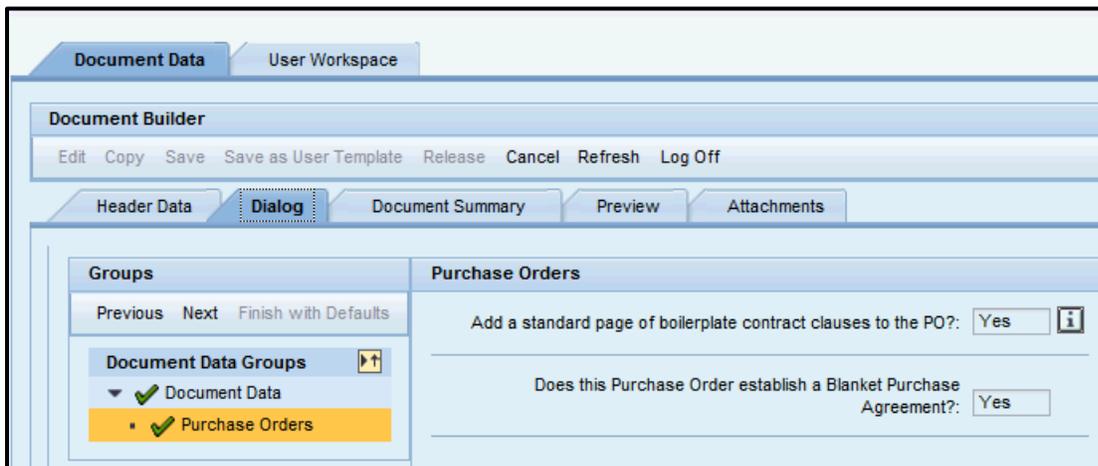
The SCEIS Materials Management Team, in cooperation with the Procurement Services Office, is pleased to announce a modification to the wording in Supplier Relationship Manager (SRM) Document Builder's second dialog question. The second question will now read:

“Does this Purchase Order establish a Blanket Purchase Agreement?”

Previously, the second dialog question was:

“Does this Purchase Order establish a Blanket Purchase?”

If the below Document Builder questions are answered with a **Yes/Yes**, then Document Builder's output will be the BLANKET PURCHASE AGREEMENT (Nov 2007) clause.



The screenshot shows the SRM Document Builder interface. At the top, there are tabs for 'Document Data' and 'User Workspace'. Below this is a 'Document Builder' header with a menu bar containing 'Edit', 'Copy', 'Save', 'Save as User Template', 'Release', 'Cancel', 'Refresh', and 'Log Off'. The main interface has several tabs: 'Header Data', 'Dialog' (which is selected and highlighted with a dotted border), 'Document Summary', 'Preview', and 'Attachments'. The 'Dialog' tab is divided into two sections: 'Groups' and 'Purchase Orders'. The 'Groups' section on the left has a tree view under 'Document Data Groups' with 'Document Data' and 'Purchase Orders' (highlighted in orange). The 'Purchase Orders' section on the right contains two questions, each with a 'Yes' radio button and an information icon. The first question is 'Add a standard page of boilerplate contract clauses to the PO?' and the second is 'Does this Purchase Order establish a Blanket Purchase Agreement?'. Both 'Yes' radio buttons are selected.

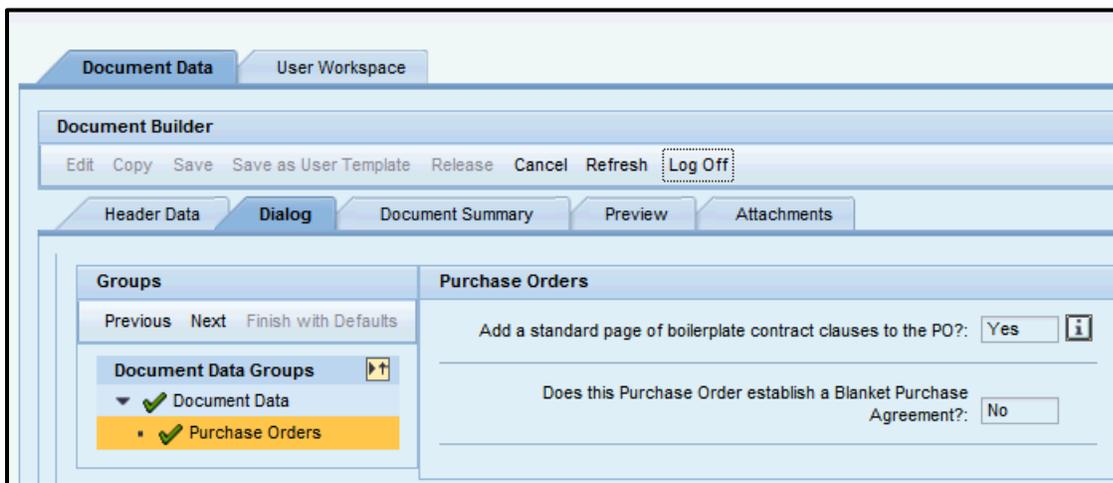
The following screen shot is a partial view of the Blanket Purchase Agreements (Nov. 2007) clause.

BLANKET PURCHASE AGREEMENTS (Nov. 2007)

(a) Pursuant to S.C. Regulation 19-445.2100(B), this purchase order establishes a blanket purchase agreement to facilitate filling repetitive needs for small quantities of miscellaneous supplies or services. Contractor shall furnish the supplies or services described herein in general terms, if and when requested by authorized personnel during the specified period and within the stipulated aggregate amount, if any. The State is obligated only to the extent of authorized calls actually placed against this blanket purchase agreement. Only those individuals expressly identified herein, by organizational component, and within any dollar limitations identified herein, may place calls under the agreement. Calls against this blanket purchase agreement generally will be made orally, except that informal correspondence may be used when ordering against agreements outside the local trade area. Written calls may be executed. Acceptance of supplies, services, or information technology shall be indicated by signature and date on the appropriate form by authorized personnel after verification and notation of any exceptions. This agreement shall be issued for a period of no longer than 12 months.

(b) All shipments under the agreement, except subscriptions and other charges for newspapers, magazines, or other periodicals, shall be accompanied by delivery tickets or sales slips which shall contain the following minimum information: (1) name of supplier; (2) blanket purchase agreement number; (3) date of call; (4) call number; (5) itemized list of supplies or services furnished; (6) quantity, unit price, and extension of each item less applicable discounts (unit price and extensions need not be shown when incompatible with the use of automated systems, provided that the invoice is itemized to show this information); and (7) date of delivery or shipment.

If the below Document Builder questions are answered with a **Yes/No** *then all other* SCEIS Transaction Types (Auction, Case Management, Emergency, Exemption, Sole Source, State Standard, Unauthorized, Blanket Emergency, Blanket Exemption, Blanket, Blanket Sole Source, Capital Lease, Operating Lease, Framework, Framework Emergency, Framework Exemption, Framework Agreement, Framework Sole Source, and Inventory) would receive Document Builder's output of STANDARD PURCHASE ORDER CLAUSE SET (NOV 2007) clause.



The screenshot shows the Document Builder interface. At the top, there are tabs for 'Document Data' and 'User Workspace'. Below that is the 'Document Builder' header with a menu bar containing 'Edit', 'Copy', 'Save', 'Save as User Template', 'Release', 'Cancel', 'Refresh', and 'Log Off'. The main area has several tabs: 'Header Data', 'Dialog' (which is active), 'Document Summary', 'Preview', and 'Attachments'. Under the 'Dialog' tab, there are two main sections: 'Groups' and 'Purchase Orders'. The 'Groups' section has 'Previous', 'Next', and 'Finish with Defaults' buttons. Below it is a list of 'Document Data Groups' with a plus sign icon. The list contains two items: 'Document Data' with a green checkmark and 'Purchase Orders' with a green checkmark and a yellow highlight. The 'Purchase Orders' section contains two questions with radio button options: 'Add a standard page of boilerplate contract clauses to the PO?: Yes' (with an information icon) and 'Does this Purchase Order establish a Blanket Purchase Agreement?: No' (with a radio button selected).

This following screen shot is a partial view of the Standard Purchase Order Clause Set (Nov 2007).

STANDARD PURCHASE ORDER CLAUSE SET (NOV 2007)

ASSIGNMENT (JAN 2006): No contract or its provisions may be assigned, sublet, or transferred without the written consent of the Procurement Officer.

BANKRUPTCY: (a) Notice. In the event the Contractor enters into proceedings relating to bankruptcy, whether voluntary or involuntary, the Contractor agrees to furnish written notification of the bankruptcy to the State. This notification shall be furnished within five (5) days of the initiation of the proceedings relating to the bankruptcy filing. This notification shall include the date on which the bankruptcy petition was filed, the identity of the court in which the bankruptcy petition was filed, and a listing of all State contracts against which final payment has not been made. This obligation remains in effect until final payment under this Contract. (b) Termination. This contract is voidable and subject to immediate termination by the State upon the contractor's insolvency, including the filing of proceedings in bankruptcy.

CHOICE-OF-LAW (JAN 2006): The Agreement, any dispute, claim, or controversy relating to the Agreement, and all the

The following is a brief excerpt from the State of South Carolina Policy on Use of Purchasing/Payment Document Types.

All purchase orders should include the standard purchase order clauses found in SCEIS "Document Builder" unless the item(s) will be purchased from a solicited contract or the purchase order is being created from a solicitation. The standard clauses set forth the contractual obligations of a vendor.

The complete Policy on Use of Purchase Orders and Direct Expenditures can be found at <http://www.cg.sc.gov/guidanceandformsforstateagencies/Documents/POLICY%20ON%20USE%20OF%20PURCHASE%20ORDERS%20AND%20DIRECT%20EXPENDITURES.PDF>

If you have questions about using this functionality, please contact the SCEIS Help Desk at (803) 896-0001 (select option 1 for SCEIS help) or use the email form available at <http://www.sceis.sc.gov/requests/>.