

Exercise 7

Edit Contract and Create an Award Document

Exercise 7: Edit Contract and Create an Award Document

1. Click the **'Strategic Purchasing'** tab
2. Click **'Contract Management'** from the blue menu bar



3. Under **'Active Queries'**, select **'Central Contracts'** - **'All'** and locate the contract number you just created in the Central Contract Number column.

Active Queries

Central Contracts [All \(287\)](#) [Released \(0\)](#) [Draft \(0\)](#) [Expired \(0\)](#) [Templates \(0\)](#) [Rejected \(0\)](#)

Quota Arrangements [All \(0\)](#) [Released \(0\)](#)

Document Output [Last 7 days \(0\)](#)

Central Contracts - All

[Show Quick Criteria Maintenance](#)

View: [Standard View] | Create Central Contract | Copy | Display | Edit | Mass C

Central Contract Number	Central Contract Name
5000008820	Statewide Term Contract Office Supplies
5000008819	Statewide Term Contract Office Supplies
5000008818	Statewide Term Contract Office Supplies
5000008817	Statewide Term Contract Office Supplies
5000008816	Statewide Term Contract Office Supplies
5000008813	ITMO: Winthrop FOCUS Reporting
5000008803	ITMO: Satellite Communications Trailer
4400007210	Web Site Design Project

Note: You may have to click refresh before the contract number appears.

4. Click the blue contract number ['44xxxxxxxx'](#) link to view details and make any changes.

- This will take you to the ‘**Display Agency Value Cont.: 44xxxxxxx**’ screen.



Note: The screen name will be the type of contract you selected

- Click ‘**Edit**’
- Click the ‘**Header**’ tab and make sure you add the ‘**Target Value**’. This is the total potential value of the contract throughout its entire term. You can also change the ‘**Valid From/To**’ dates.



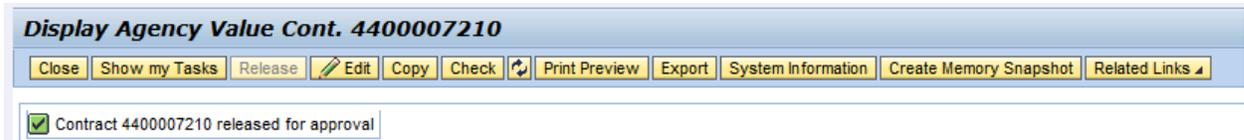
Note: Target Value MUST be added in the header tab, as Document Builder pulls in this value for the award document. Also, this was known as the Total Potential Value field in 5.0.

- To make changes at the line item level of the contract, such as price, click the ‘**Items**’ tab and make any necessary changes.

Note: If you negotiated any savings on any the items, you will need to change it here.

- Click ‘**Check**’ to make sure there are no error messages.

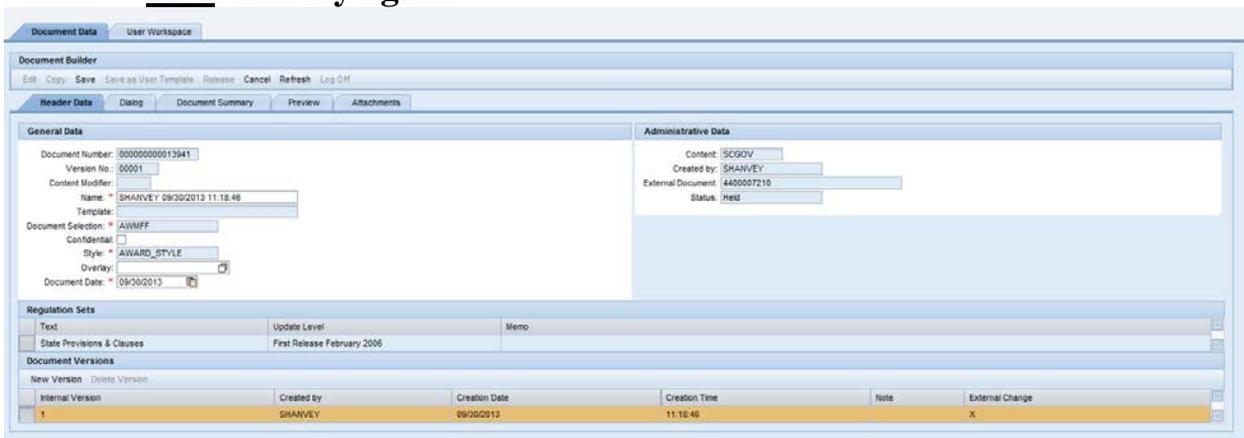
10. Click **'Release'** and make sure you get the following message at the top left hand side of the screen.



11. Click **'Edit'** and then **'Save'**. You should see the following message:

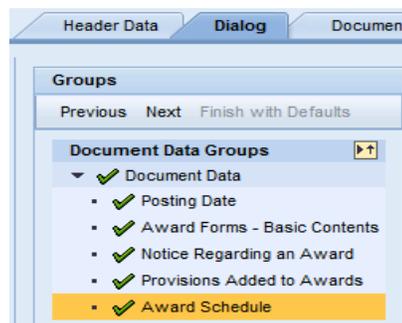


12. Click on **'Related links'** and select **'Doc Builder'** from the pull down menu.
TIP: If the Document Builder option is not on the pull down menu, click 'save' and try again.

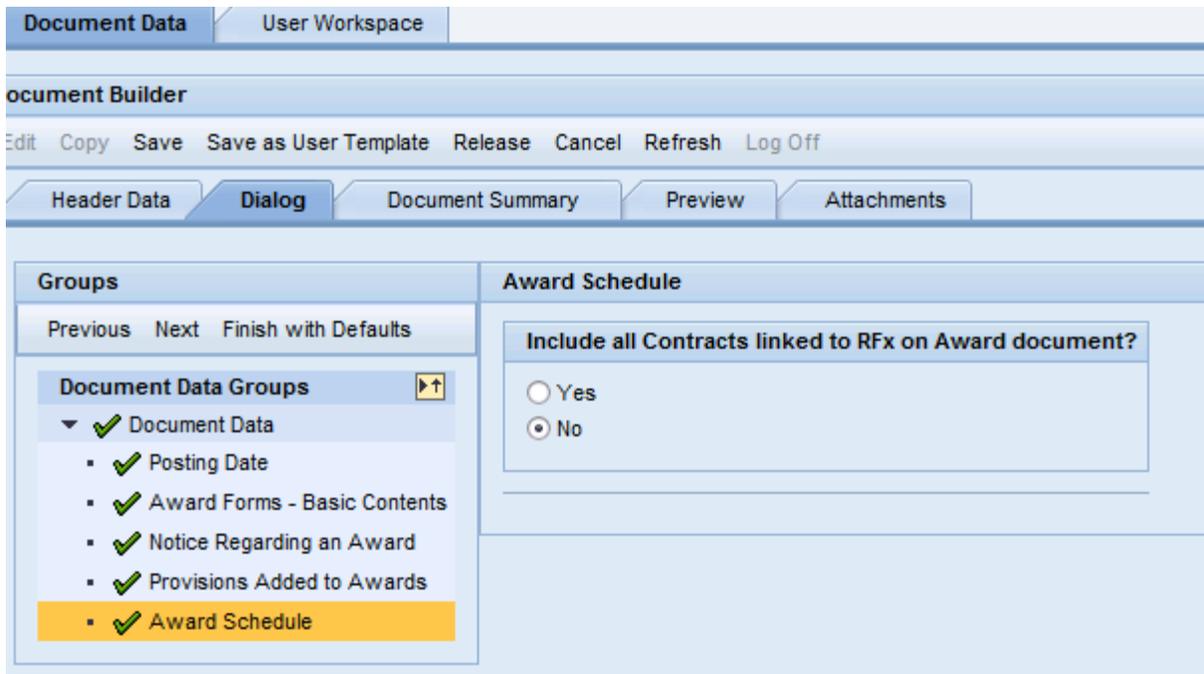


13. Click on the **'Dialog'** tab and answer questions. Click **'next'** after you answer each question (including the last question) and make sure that all red **X's** have been turned to a green check mark ✓.

TIP: Some of the questions require you to click **'Refresh' after you answer them.**



14. Once all the questions are answered, you can preview the award document by clicking on the **‘Preview’** tab and selecting the **‘DocB: Document’**. This is an optional step.
15. If you are satisfied with the document, click on **‘Release’** and then click on **‘Log Off’**, to log off of Doc. Builder. When asked **‘Are you sure you want to log off?’** - select **YES**, which will close the window.



16. From the screen **‘Display Agency Value Cont. 44xxxxxxxxx’** screen, Click on the refresh icon 



17. Click on **Notes and Attachments** Tab.

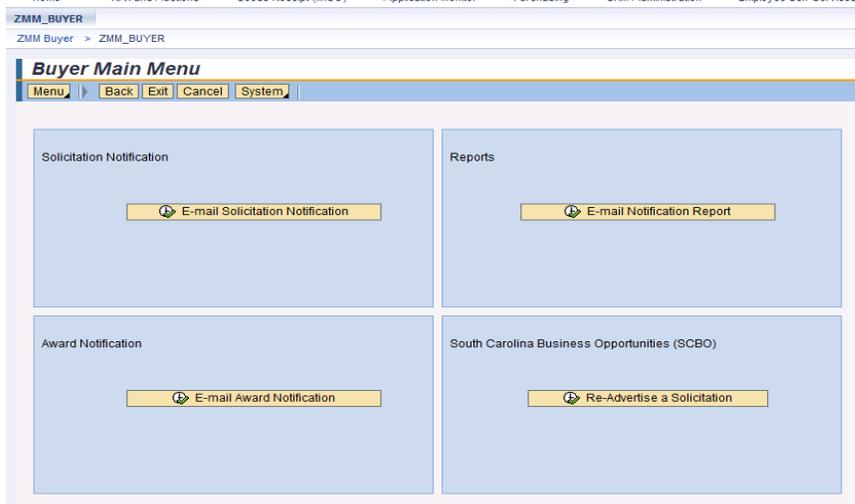
18. In the Attachments section you will see the award document in the **Description** column titled **Statement of Award** or **Intent to Award**. Based on the dialog answers for the Total contract value.

19. You can open and view the award document by clicking on the blue **Intent to Award** document in the **Description** column. . If you want to make changes to the document, you will need to save the document to your computer as a MS Word document and you will then have to add it back as an attachment. If no changes are needed to be made and you want to publish this award document as is, skip the next step.

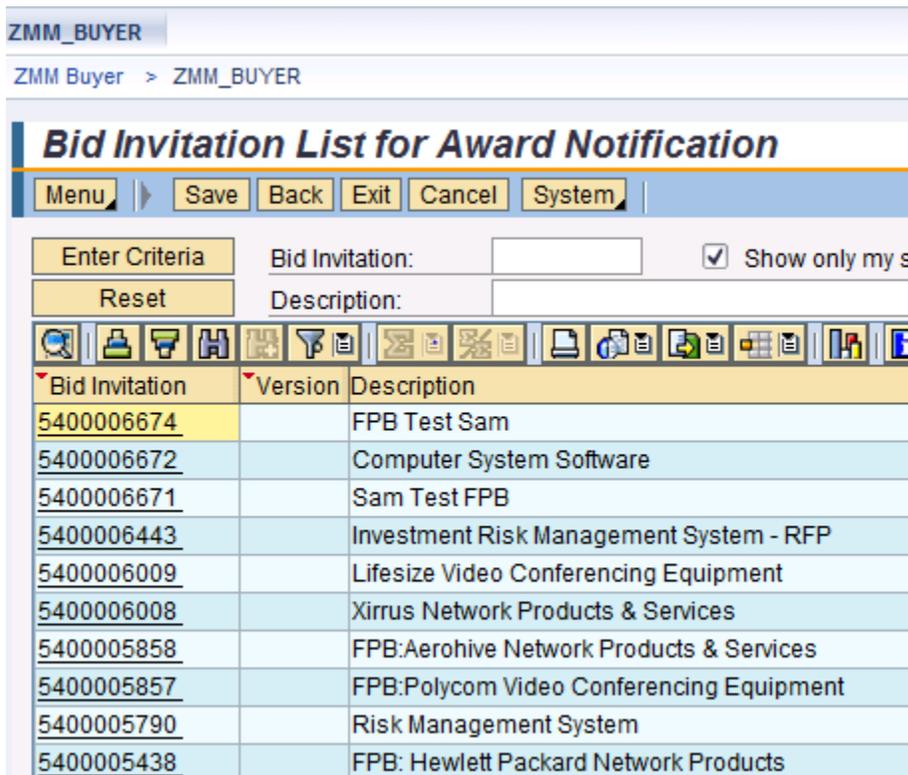
20. To add your changed award document, you will need to select **'Edit'** at the top of the screen and then click on **'Add Attachments'** in the attachment section. This will open an **'Add Attachment screen'**, select the Browse box, which will allow you to select the file you saved to your computer and updated. Select the file you updated and select **'Open'**. The selected file will be added. You can change the name at this point, by inserting the name in the Description field. This will only change the **file name** not the **posted to the web name**. The **'Add Attachment'** section automatically defaults to **'Visible Internally only'** and you can change this later, if needed. Select **'OK'**. The system will add the document titled **'Solicitation'** (default name) and you will need to rename it to the name you want to appear on the web site.
21. To change the name of the award document you must highlight the line of the award document you added and select the **'Edit Description'** box. A box will appear with the old description and allow you to add the new description. Then select **OK'**. This will take you back and you can see that the name was changed.
TIP: If you are posting an intent to award, highlight the file and change the name to **'Intent to Award'**, if needed
22. Check the boxes by any documents that you wish to remain internal only. **All unchecked documents will be published to the web**
23. Click **Release**
24. Click on the refresh icon  to make sure the Status shows **'Released'**
25. Click **'Close'**  box and go to the web to validate.
26. To send award notifications to all bidders, Click on the **'ZMM Buyer'** tab at the top of the screen.



27. Click on ‘Award Notification’ box.

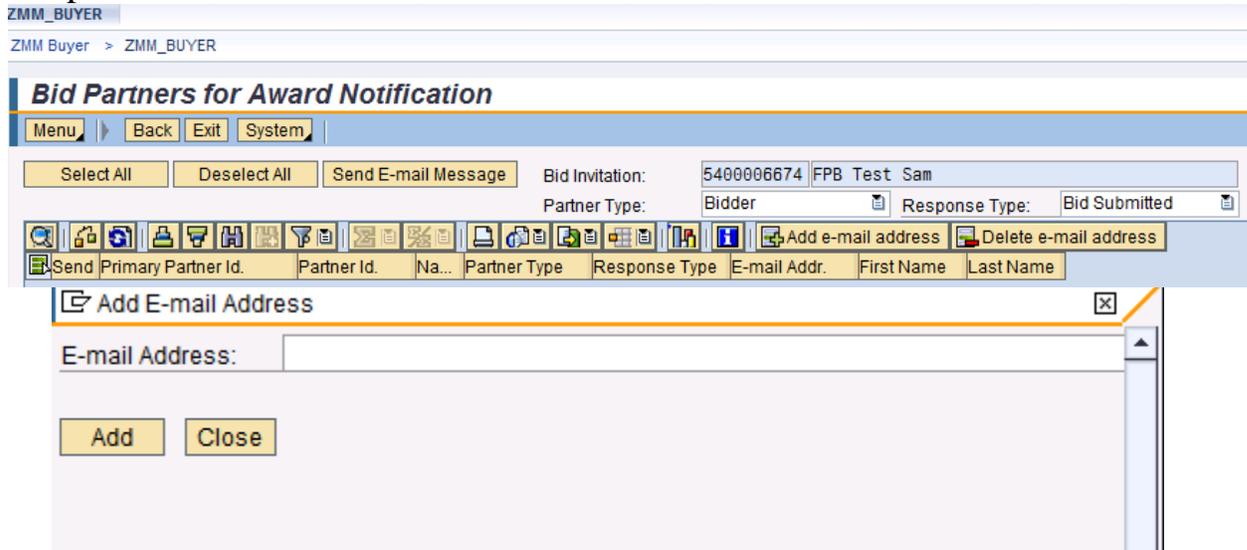


28. Select the Rfx you want to send out the email for listed in the ‘Bid Invitation’ column



29. The bid Partners list will include all of the bidders that responded to the RFx, any bidders added to the RFx even if they did not respond, and the buyer’s email address.

30. You can also add internal management email addresses by selecting the ‘**Add e-mail address**’ box and entering the email addresses and selecting add. Continue this process until all emails have been entered.

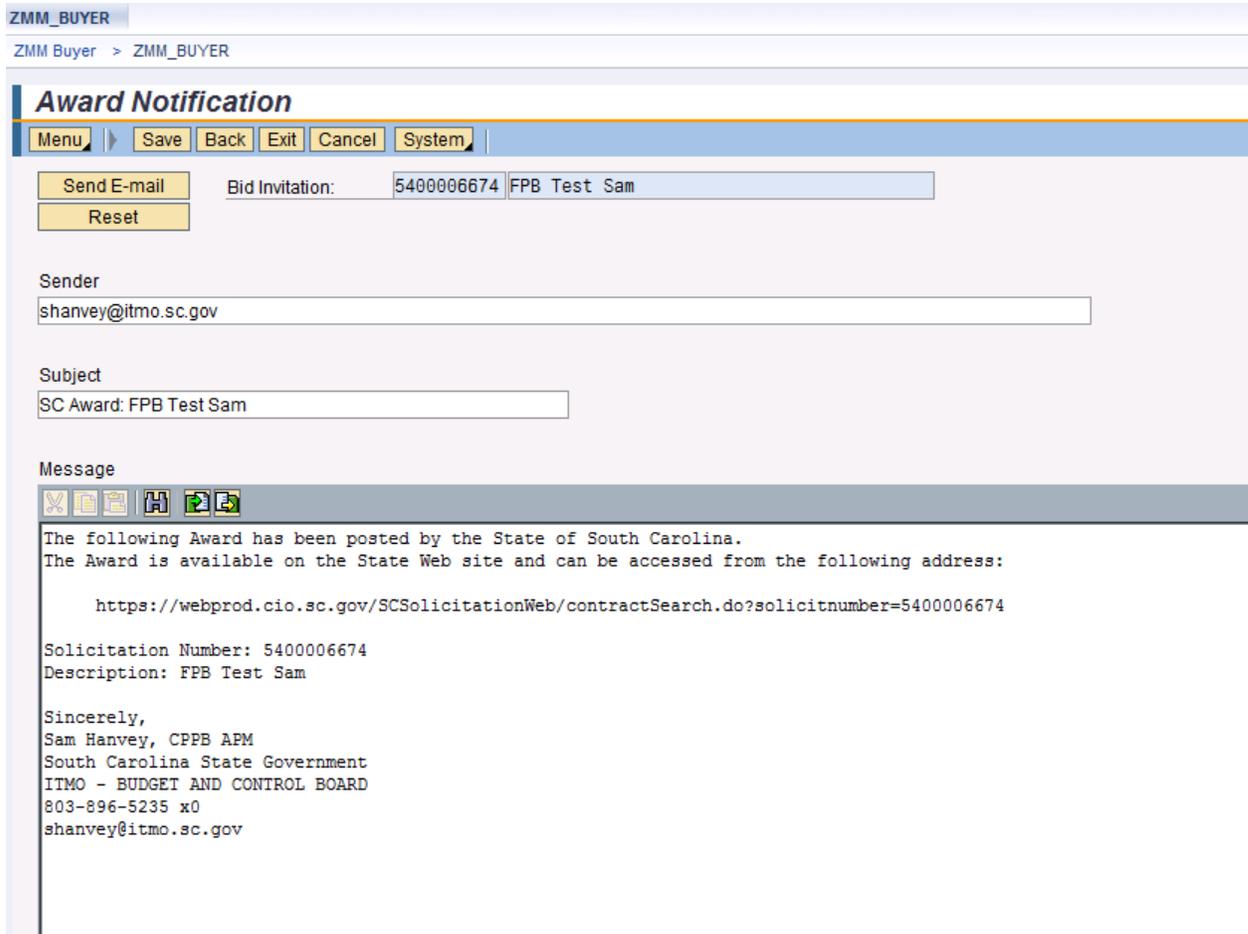


31. Click “Select All” to choose all e-mail addresses in the list or you can select each e-mail individually.

32. Select the ‘**Send E-Mail Message**’ box to view and send the email.



33. The ‘**Award Notification**’ screen will appear so you can edit and verify the email message:



ZMM_BUYER

ZMM Buyer > ZMM_BUYER

Award Notification

Menu Save Back Exit Cancel System

Send E-mail Bid Invitation: 5400006674 FPB Test Sam

Reset

Sender
shanvey@itmo.sc.gov

Subject
SC Award: FPB Test Sam

Message

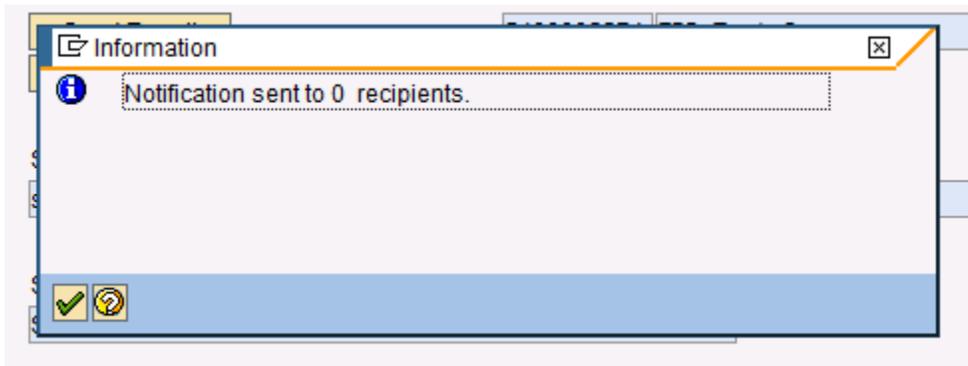
The following Award has been posted by the State of South Carolina.
The Award is available on the State Web site and can be accessed from the following address:

https://webprod.cio.sc.gov/SCSolicitationWeb/contractSearch.do?solicitationnumber=5400006674

Solicitation Number: 5400006674
Description: FPB Test Sam

Sincerely,
Sam Hanvey, CPPB APM
South Carolina State Government
ITMO - BUDGET AND CONTROL BOARD
803-896-5235 x0
shanvey@itmo.sc.gov

34. You can edit the message, if needed. Once completed, select the ‘**Send E-mail**’ box and you will receive a message that it was sent out.



35. Click on the green check mark

36. Click on the **'Back'** button



37. Click on the **'Exit'** button to return to the main menu.



38. You have sent out the award notifications.