

## **Exercise 1**

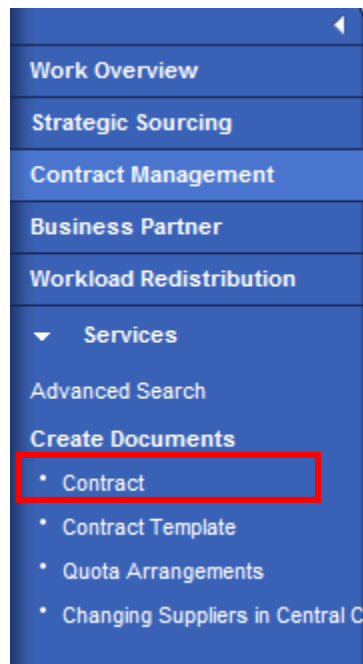
### **Create Contract without an RFx**

## **Exercise 1: Create Contract without an RFx**

1. Log into SRM.
2. Click the ‘**Strategic Purchasing**’ tab
3. Click ‘**Contract Management**’ from the blue menu bar



4. Scroll down the blue menu bar and click on ‘Contract’ under “Create Documents.



5. Select the ‘Contract Type’ you want to create. Click ‘Continue’ box.
6. The Contract Screen will open in a new window. The Contract number will appear in the top left hand corner.

7. On 'Overview' tab, use the 'Supplier' search function to select the vendor.

**Create Agency Value Cont. 4400007242**

Close Release Save Check Print Preview Export Import Park Related Links

Contract Number 4400007242 Smart Number Contract Type Agency Value Cont. Status In Process Contract Owner 40339 KIMBER CRAIG

Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking

**General Header Data**

Contract Number: 4400007242 Contract Name:

Supplier: \*

Valid From / To: \* 10/14/2013 - 10/13/2014 Target Value/ Currency: 0.00 USD

Purchasing Organization: \*  Release Value: 0.00 USD

Purchasing Group: \*  Basic Contract:

**Items**

Details Select Add Item Exercise Option Copy Paste Duplicate Delete

Line Number	Item Category	Item Number	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Total Value	Price Per	Price Unit	Reference It
	Normal				0.000			0.00	0.00	USD		0		0000000000
	Normal				0.000			0.00	0.00	USD		0		0000000000
	Normal				0.000			0.00	0.00	USD		0		0000000000

8. Enter "Castles\*" in the Name 1/last name' field and click 'Start Search'

**Search Criteria**

Business Partner:

Search term 1:

Search term 2:

**Name 1/last name:**

Name 2/First name:

E-Mail Address:

DUNS:

Creditor:

Logical System:

Industry sector:

PCard co.:

Purch. Organization:

Purch. Org. ID:

Country Key:

Region:

Postal Code:

City:

Street:

Building Code:

Micro Company:

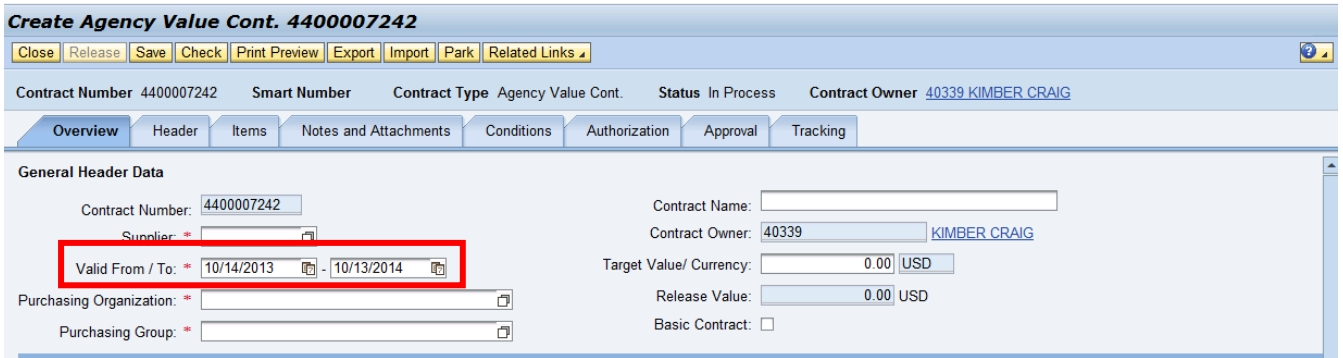
Term Liability:

Restrict Number of Value List Entries To

**Start Search**

9. Select Castles Engineering from the Results List and click OK

10. Enter the ‘Valid From/To’ dates. The system defaults to one year for the ‘Valid From/To.’ Change the Valid To date to make the contract a 5-year contract.



**Create Agency Value Cont. 4400007242**

Close Release Save Check Print Preview Export Import Park Related Links

Contract Number 4400007242 Smart Number Contract Type Agency Value Cont. Status In Process Contract Owner 40339 KIMBER CRAIG

Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking

**General Header Data**

Contract Number: 4400007242 Contract Name:

Supplier: \*

Contract Owner: 40339 KIMBER CRAIG

Valid From / To: \* 10/14/2013 - 10/13/2014

Target Value/ Currency: 0.00 USD

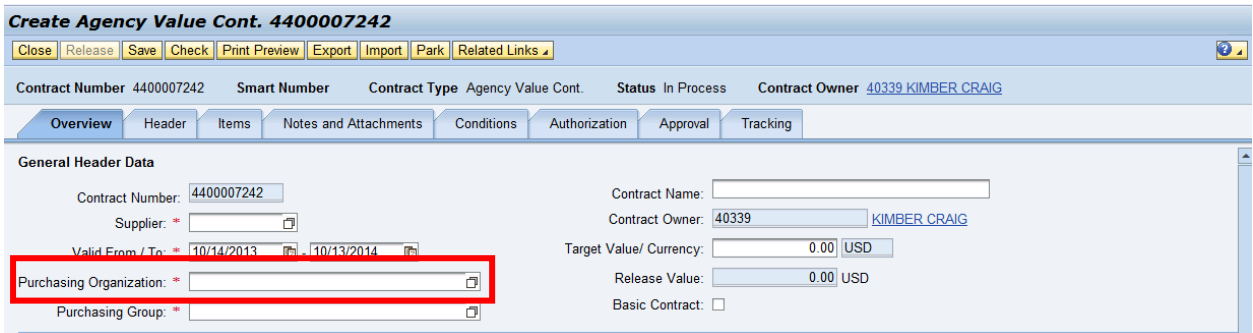
Purchasing Organization: \*

Release Value: 0.00 USD

Purchasing Group: \*

Basic Contract:

11. Use the Search Function on ‘Purchasing Organization’ to select “SCEIS Purchasing Organization”



**Create Agency Value Cont. 4400007242**

Close Release Save Check Print Preview Export Import Park Related Links

Contract Number 4400007242 Smart Number Contract Type Agency Value Cont. Status In Process Contract Owner 40339 KIMBER CRAIG

Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking

**General Header Data**

Contract Number: 4400007242 Contract Name:

Supplier: \*

Contract Owner: 40339 KIMBER CRAIG

Valid From / To: \* 10/14/2013 - 10/13/2014

Target Value/ Currency: 0.00 USD

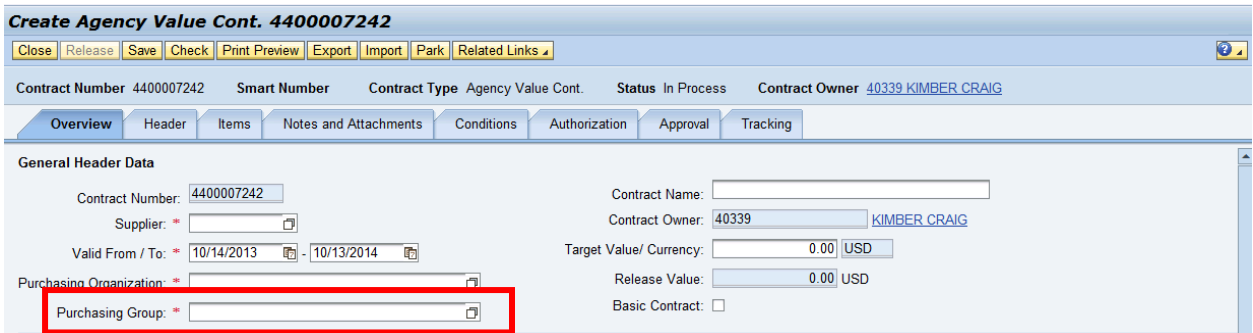
Purchasing Organization: \*

Release Value: 0.00 USD

Purchasing Group: \*

Basic Contract:

12. Use the Search Function on ‘Purchasing Group’ to select your Purchasing Group.



**Create Agency Value Cont. 4400007242**

Close Release Save Check Print Preview Export Import Park Related Links

Contract Number 4400007242 Smart Number Contract Type Agency Value Cont. Status In Process Contract Owner 40339 KIMBER CRAIG

Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking

**General Header Data**

Contract Number: 4400007242 Contract Name:

Supplier: \*

Contract Owner: 40339 KIMBER CRAIG

Valid From / To: \* 10/14/2013 - 10/13/2014

Target Value/ Currency: 0.00 USD

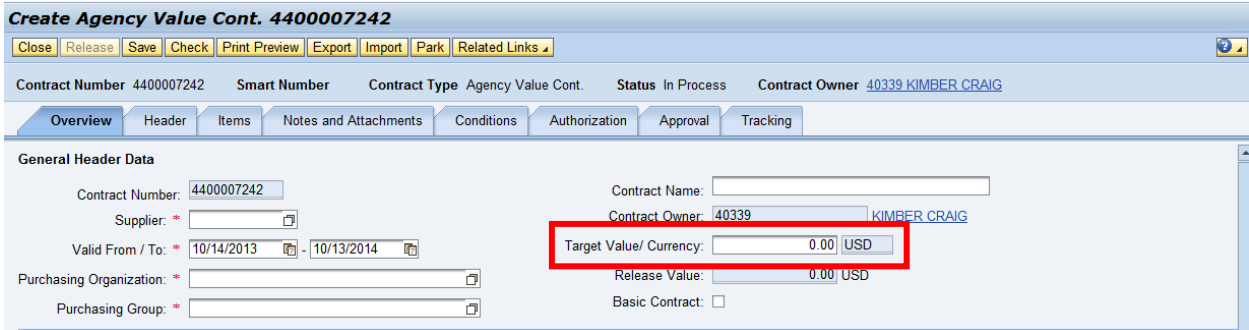
Purchasing Organization: \*

Release Value: 0.00 USD

Purchasing Group: \*

Basic Contract:

13. Enter the Total Potential Value of the contract in the ‘Target Value’ field.



**Create Agency Value Cont. 4400007242**

Close Release Save Check Print Preview Export Import Park Related Links

Contract Number 4400007242 Smart Number Contract Type Agency Value Cont. Status In Process Contract Owner 40339 KIMBER CRAIG

Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking

**General Header Data**

Contract Number: 4400007242 Contract Name:

Supplier:  Contract Owner: 40339 KIMBER CRAIG

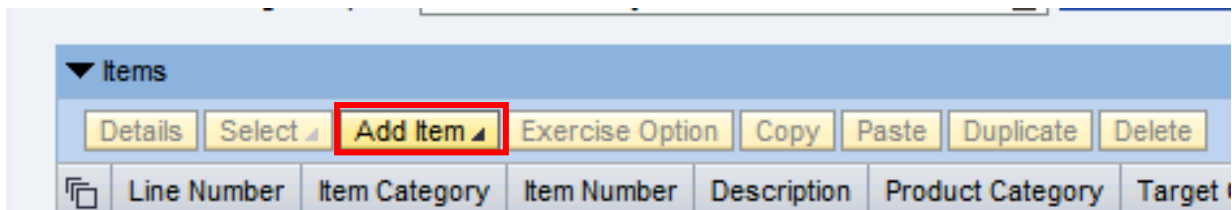
Valid From / To: 10/14/2013 - 10/13/2014 **Target Value/ Currency: 0.00 USD**

Purchasing Organization:  Release Value: 0.00 USD

Purchasing Group:  Basic Contract:

14. Click the **Items** tab.

15. Click “Add item” and select NIGP/Contract Search from the drop down.



▼ Items

Details Select **Add Item** Exercise Option Copy Paste Duplicate Delete

Line Number	Item Category	Item Number	Description	Product Category	Target
-------------	---------------	-------------	-------------	------------------	--------

16. Click on the NIGP Search Tab.

17. Search for commodities/services with this NIGP Code – 20420. Select the NIP code and click Punch-Out to SRM.

18. The following fields will be populated but can be updated if necessary:

- a. Description (defaults to NIGP description)
- b. Product Category – NIGP Code
- c. Target Quantity (defaults to 1)
- d. Unit (defaults to EA)
- e. Price Per (defaults to 1).

**19. Enter the price**

▼ Items														
<span>Details</span> <span>Select</span> <span>Add Item</span> <span>Exercise Option</span> <span>Copy</span> <span>Paste</span> <span>Duplicate</span> <span>Delete</span>														
Line Number	Item Category	Option Type	Item Number	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Total Value	Price Per	Price Unit
1	Normal		1	Communication Control Units: Concentrato	20420	1		EA	0.00	0.00	USD		1	EA

**20. Click on Details button.**

**21. On the General Data Tab, scroll down to the Partner section. In the Location Row, use the Search under Number to add your agency’s plant code.**

▼ Partner						
<span>Details</span> <span>Add</span> <span>Send E-Mail</span> <span>Call</span> <span>Clear</span> <span style="float: right;">Filter Settings</span>						
Function	Exclude	Number	Name	Valid from	Valid to	Phone Number
• Vendor	<input type="checkbox"/>	7000057903	<a href="#">CASTLES ENGINEERING INC</a>			(843) 448-0910
• Goods Recipient	<input type="checkbox"/>					
• Responsible Employee	<input type="checkbox"/>	40339	<a href="#">KIMBER CRAIG</a>			
• Purch. Org. Auth. For Release	<input type="checkbox"/>					
• Location	<input type="checkbox"/>					

**22. On the Notes and Attachments Tab, use the Add drop down to include notes and text.**

**23. When you are done, click “Release” and then refresh the page. The status should now read “Released.”**

**Contract Created:** \_\_\_\_\_