SCEIS CONTRACT ADMINISTRATION (PR250)

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SCEIS CONTRACT ADMINISTRATION (PR250)

End User Training
Columbia, SC
Fall 2013
Version 1 - October 14, 2013

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Welcome and Introductions

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Welcome to SCEIS Contract Administration

- Introductions
- Sign-in sheet
- Restrooms
- Breaks
- Parking Lot
- Complete course evaluation at end of class

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Classroom Logistics

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- Classroom etiquette
  - Cell phones off/silence
  - No side conversations
- Feel free to ask questions
- No email or internet usage during class except at breaks

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Course Learning Objectives

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- Upon completion of this course, you should be able to:
  - Create a contract.
  - Edit a contract.
  - Create attachments to a contract.
  - Understand different contract types.
  - Determine contract usage.

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Course Map

- **Lesson 1:** Create Contract
- **Lesson 2:** Edit Contract
- **Lesson 3:** Contract Attachments
- **Lesson 4:** Contract Types
- **Lesson 5:** Contract Usage

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LESSON 1: CREATE CONTRACT

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Lesson 1 Learning Objectives

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- Upon completion of this lesson, you should be able to:

  – Understand how contracts are created.

  – Create a contract in SRM.

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Solicitation Process (Supplier Relationship Manager - SRM)

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- Most contracts are created from a Solicitation.

- Contract is automatically created and filled in with vendor information and line items.

- The buyer must ensure the Validity Start & End Dates and the Target Value are correct.

- Contract numbers begin with a "44"

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Strategic Purchasing Contract Management

@ Use Strategic Purchasing – Contract Management to create a contract when:

  – a contract is not originated by a solicitation (for example – an exempt contract; sole source contract; or a vendor change on a contract).

  – an issue with the solicitation will not allow you to create a contract (for example – an incorrect follow-on document).

@ Contract number will begin with a "44."

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Create Documents – Contract Overview

@ Mandatory information
  – Supplier
  – Valid From/To
  – Purchasing Organization
  – Purchasing Group

@ Contract Name is an optional field

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Contract Header

- Target Value = Total Potential Value of the contract. SCEIS will not allow POs to be issued over the Target Value of the Contract.

- The RFx Number and Bidder's Bid Number can be added if necessary.

- The Plant must be entered in the Location Field. If no plant is entered, the contract is entered as a State Term Contract in the system.

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Contract Items

- Use the Add Item drop down to select the type of line item. Most common choices are Product Category and NIGP/Contract Search.

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Line Item Overview

@ Fields included on the Overview screen:
  – Item Category
    ▪ Normal
    ▪ Product Category
  – Description
  – Product Category = NIGP Code
  – Target Quantity
  – Target Value
  – Unit
  – Price
  – Price Per

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Release Contract

@ After all information has been entered, click Release.

@ For a contract to be valid and available for use by shopping cart creators it must have a status of RELEASED.

@ For contracts created without an RFx, buyers will receive a warning message:

⚠ Sourcing criteria are missing from contract item – Display Help

This indicates that the contract was created directly and was not sourced via RFx.

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Demonstration and Exercise

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◆ **Strategic Purchasing**

    ◆ Contract Management

        ◆ Create Contract – Exercise 1

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Lesson 1 Summary

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@ You should now be able to:

    – Understand how contracts are created.

    – Create a contract in SRM.

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LESSON 2: EDIT CONTRACT

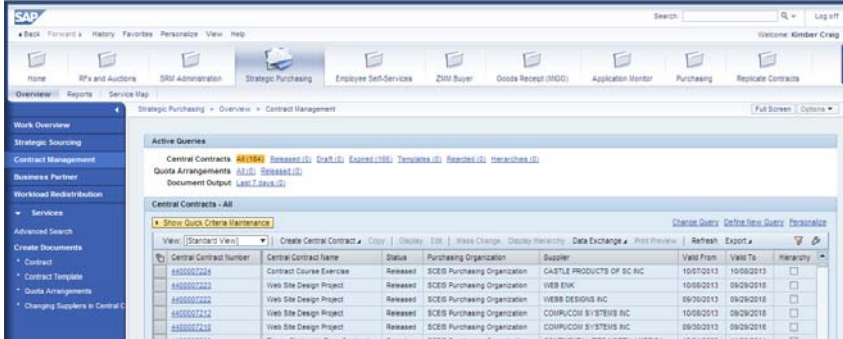## Lesson 2 Learning Objectives

@ Upon completion of this lesson, you should be able to:

– Change Valid From/To dates on a contract.

– Change the Target Value on a contract.

– Change Purchasing Group on a contract.

– Change a price on a contract.

– Change a vendor on a contract.

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Strategic Purchasing Contract Management

- Locate Contracts under Active Queries Central Contracts.
- Expired Contracts appear in Central Contracts (Expired) but not in Central Contracts (All).

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Change Valid From/To Dates

- Valid From/To Dates may need to be changed due to protest, early termination, or contract extension.
- Changes are made directly in the appropriate field on either the Contract Overview or Contract Header Tab.
- Click Release once all changes are made.
- The Valid To date can be changed to a date in the past.

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Change of Target Value

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- There is a PO Hard Stop on the Target Value.
  - Once the total of POs issued against the contract reaches the Target Value, no more POs may be issued.
- Once the Hard Stop is reached, either the Target Value must be increased to issue more POs or the contract should be re-bid.
- Changes are made directly in the appropriate field on either the Contract Overview or Contract Header Tab.

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Change of Purchasing Group

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- Only users with access to the Purchasing Group may view or update the Contract in ECC.

- The name & phone number of the buyer for the Purchasing Group appear on the SCEIS Contract Search Screen in the Shopping Cart and at www.procurement.sc.gov.

- Changes are made directly in the appropriate field on either the Contract Overview or Contract Header Tab.

- The Owner of the Contract (creator) can not be changed.

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Change of Price

- Price changes are now entered directly in the Price field on the line item.

Change Agency Value Cont. 4400007225

| Read Only | Close | Release | Save | Check | Lock | Close Contract | Print Preview | Export | Import | Park | Related Links |

Contract Number 4400007225 (Change Version)   Smart Number PR235 Instructor RFx for 10/9/2013   Contract Type Agency Value Cont.   Status In Process
Supplier 7000000458 RGB TERPWORKS   Contract Owner 40339 KIMBER CRAIG

| Overview | Header | Items | Notes and Attachments | Conditions | Authorization | Approval | Tracking |

▼ Items
| Details | Select | Add Item | Exercise Option | Copy | Paste | Duplicate | Delete |

Line Number	Item Category	Option Type	Item Number	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Total
1	Normal		1	PR235 Exercise 1 - Building Cleaning	91003	1		EA	100.00	115.00	USD	
2	Normal		2	PR 235 Exercise 1 - Security Services		1		EA	100.00	100.00	USD	
	Normal								0.000	0.00	USD	
	Normal								0.000	0.00	USD	
	Normal								0.000	0.00	USD	

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Change of Price cont.

◄ ► Details for Selected Item 1 : PR235 Exercise 1 - Building Cleaning

| General Data | Conditions | Account Assignment | Notes and Attachments | Approval Preview | Payment | Release |

▼ Conditions
| Add Condition | Scales | Duplicate | Remove | Filter Settings

Condition Type	Sc...	Amo...	Currency	Price Per	Pric...	Valid From	Location	Valid To	Locati...
Price(Contract/Bid)		100.00	USD	1	EA	10/10/2013		10/10/2013	
Price(Contract/Bid)		115.00	USD	1	EA	10/11/2013		12/31/9999	

- SRM will create the pricing condition in order to track price changes over the life of the contract.
- Contracted price increases may be entered in advance by changing the Valid From and Valid To dates on the conditions tab.

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Change of Vendor

- Change of Vendor – Due to Assignments, Novations, or Change of Business Type.
- Vendors may change for multiple reasons:
  - The vendor was sold to another party.
  - The vendor assigned the contract to another vendor.
  - The vendor number was blocked due to:
    - Change in Status (Sole Proprietor to LLC for example).
    - Change in Tax ID number.
- If a vendor has moved, the existing vendor number should be updated and no change to the contract is necessary.

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Change of Vendor cont

- The vendor number can't be changed on a Released contract in SRM.
- The existing contract will need to be ended.
- The existing contract can be copied into a new contract and the vendor changed on the new contract.

Display Agency Value Cont. 4400007225

| Close | Release | ✎ Edit | Copy | Check | ↻ | Renew | Print Preview | Export | Related Links ▴ |

Contract Number 4400007225 **Smart Number** PR235 Instructor RFx for 10/9/2013 **Contract Type** Agency Value Cont. **Status** Released
Supplier 7000000458 RGB TERPWORKS **Contract Owner** 40339 KIMBER CRAIG

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Change of Vendor cont

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- ☢ The name of the new contract will be "Copy of Contract 440000xxxx."
- ☢ The contract name can be changed.
- ☢ If the name is changed some reference to the prior contract should be included in the notes and attachments field.
- ☢ There is no reference to the original contract on the Tracking Tab.

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Demonstration and Exercise

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- ◆ **Strategic Purchasing**
  - ◆ Contract Management
    - ◆ Edit Contract – Exercise 2

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Lesson 2 Summary

- You should now be able to:
  - Change Valid From/To dates on a contract.
  - Change the Target Value on a contract.
  - Change Purchasing Group on a contract.
  - Change a price on a contract.
  - Change a vendor on a contract.

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LESSON 3: CONTRACT ATTACHMENTS

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Lesson 3 Learning Objectives

⨀ Upon completion of this lesson, you should be able to:

– Attach documents to a contract.

– Publish documents to the web.

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Notes and Attachments

⨀ All attachments are made under the Notes and Attachments tab.

⨀ Contracts created from an RFx will include the attachments from the RFx.

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Add Attachment

- Click Add Attachment to upload documents to the contract.
- Attachments can be posted on the Procurement Center website and in the Shopping Cart search by unchecking the Visible Internally only check box.

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Demonstration and Exercise

◆ Strategic Purchasing
  - ◆ Contract Management
    - ◆ Add Attachment to a Contract – Exercise 3

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Lesson 3 Summary

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- You should now be able to:
    - Attach documents to a contract.
    - Publish documents to the web.

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LESSON 4: CONTRACT TYPES

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Lesson 4 Learning Objectives

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- Upon completion of this lesson, you should be able to:
  - Understand and create a Normal Contract.
  - Understand and create a Product Category Contract.
  - Understand and create a contract for an Inventory Item.

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Normal Contracts

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- Normal contracts list specific line items and specific pricing.
- Pricing needs to be updated on each line item as the price changes.
- Shopping cart users select the specific line item, and the line item description & price are populated from the contract into the shopping cart.
- All contracts created from an RFx are Normal contracts.

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Product Category Contracts

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- Product Category Contracts should be set-up when using Percentage Discount or Percentage Markup contracts.
- Contracts are set-up with "Product Category" in the Item Category field on the line item.
- The line item contains a generic description and a material group without any pricing information.
- A Target Value must be entered on the line item.
- Additional Documents (such as Price Sheets or Ordering Instructions) must be added to the contract and made available for shopping cart users to view and determine pricing.
- Shopping cart users select the generic line item and must enter a more specific description and the price for each line.

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Demonstration and Exercise

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◆ **Strategic Purchasing**

◆ Contract Management

◆ Create Product Category Contract – Exercise 4

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Inventory Contracts

- Inventory contracts contain the 6 digit material master number in the Product ID field in the line item detail.
- When the material master number is entered on the line item, the description, material group, and unit of measure will automatically populate.

Contracts for Inventory Items

- If an item is maintained in multiple plants, the contract must include an individual line for each plant. For example, if material master number 102493 (Blouse, LS, SCDC, 28, Blue) is held at plants DC02, DC03, & DC04, then the item will be listed on the contract 3 times.
- Replicate Contracts is used to copy items to multiple plants on a contract.

Lesson 4 Summary

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- You should now be able to:

  – Understand and create a Normal Contract.

  – Understand and create a Product Category Contract.

  – Understand and create a contract for an Inventory Item.

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LESSON 5: CONTRACT USAGE

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Lesson 5 Learning Objectives

@ Upon completion of this lesson, you should be able to:

  – Determine usage for a specific Contract.

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Release Value

@ The Release Value of a contract is the total amount of Purchase Orders issued against a contract.

@ Release Value is found on the Overview tab.

Display MMO Value Contract 5000008818

| Close | Release | ✎ Edit | Copy | Check | ↻ | Renew | Print Preview | Export | Related Links ◢ |

Contract Number 5000008818   **Smart Number** Statewide Term Contract Office Supplies   **Contract Type** MMO Value Contract   **Status** Released
   Supplier 7000122678 STAPLES BUSINESS ADVANTAGE   **Contract Owner** 3072 Theresa Watts

| Overview | Header | Items | Notes and Attachments | Conditions | Authorization | Approval | Tracking |

General Header Data

Contract Number: 5000008818

Supplier: * 7000122678   STAPLES BUSINESS ADVANTAGE

Valid From / To: * 01/01/2009   -   12/31/2013

Purchasing Organization: * SCEIS Purchasing Organization

Purchasing Group: * MMO - T. Watts   Show Members

Contract Name: Statewide Term Contract Office Supplies

Contract Owner: 3072   Theresa Watts

Target Value/ Currency: 5,000,000.00 USD

Release Value: 75,567.05 USD

Basic Contract: ☐

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Contract Tracking

- A list of Purchase Orders issued against a contract will appear on the Tracking Tab.
- Purchase Orders must be issued against the contract in SRM to appear.

Lesson 5 Summary

- You should now be able to:
  - Determine usage for a specific Contract.

Course Summary

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- You should now be able to:
  - Create a contract.
  - Edit a contract.
  - Create attachments to a contract.
  - Understand different contract types.
  - Determine contract usage.

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Any Questions?

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Next Steps

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- Additional support and reference materials
  - You can access additional support and print step-by-step procedures on the SCEIS uPerform website.

  Go to the SCEIS website at **http://www.sceis.sc.gov,** click **Training,** then click **SCEIS uPerform**

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Evaluation

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Please complete the online course evaluation in Blackboard.

Your input helps shape future enhancements to the SCEIS End User Training Program

Go to the SCEIS website http://www.sceis.sc.gov click on **Training** and then click **Blackboard**

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