



**SCEIS**  
South Carolina Enterprise Information System

**SCEIS CONTRACT ADMINISTRATION  
(PR250)**

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

STATE INFORMATION  
TECHNOLOGY  
**BITCB**  
SC BUDGET AND CONTROL BOARD



**Welcome and Introductions**

**SCEIS**  
South Carolina Enterprise Information System

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



- 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



- 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



- ④ 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)



- ④ Most contracts are created from a Solicitation.
- ④ Contract is automatically created and filled in with vendor information and line items.
- ④ The buyer must ensure the Validity Start & End Dates and the Target Value are correct.
- ④ 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



**Create Agency Value Cont. 440007224**

Contract Number: 440007224    Smart Number:    Contract Type: Agency Value Cont.    Status: In Process    Contract Owner: 60224.KRIBER.CRAJ

Overview    Header    Items    Notes and Attachments    Conditions    Authorization    Approval    Tracking

**General Header Data**

Contract Number: 440007224    Contract Name:

Supplier:     Contract Owner: 60224    0000000000

Valid From / To: 12/07/2012 - 12/06/2014    Target Value/Currency: 0.00 USD

Purchasing Organization:     Release Value: 0.00 USD

Purchasing Group:     Basic Contract:

**Items**

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 Item Number	Distribution	Block Local
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		

- 🕒 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.

Line Number	Product Category	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Total Value	Price Per	Price Unit	Reference Item Number	Distribution	Stock Location
10	Normal			0.000			0.00	0.00	USD				0000000000		
10	FBI			0.000			0.00	0.00	USD				0000000000		
10	Semi-Punch Out Catalog			0.000			0.00	0.00	USD				0000000000		
10	Shawnee			0.000			0.00	0.00	USD				0000000000		
10	Tropical			0.000			0.00	0.00	USD				0000000000		
10	Festivals			0.000			0.00	0.00	USD				0000000000		
10	Fisher Scientific			0.000			0.00	0.00	USD				0000000000		
10	MISC Industrial			0.000			0.00	0.00	USD				0000000000		
10	NIGP/Contract Search			0.000			0.00	0.00	USD				0000000000		
10	Office Max			0.000			0.00	0.00	USD				0000000000		
10	Spectrum			0.000			0.00	0.00	USD				0000000000		
10	Normal			0.000			0.00	0.00	USD				0000000000		

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## Line Item Overview



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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	Referen
1	Normal		1	Motor and Engine Parts and Accessories (12055)		0.000		EA	0.00	17.00	USD			1/EA	0
	Normal								0.00	0.00	USD			0	0000000C

- 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



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- 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



- ◆ **Strategic Purchasing**
  - ◆ Contract Management
    - ◆ Create Contract – Exercise 1

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## Lesson 1 Summary



- 🕒 You should now be able to:
  - Understand how contracts are created.
  - Create a contract in SRM.

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## LESSON 2: EDIT CONTRACT



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### Lesson 2 Learning Objectives




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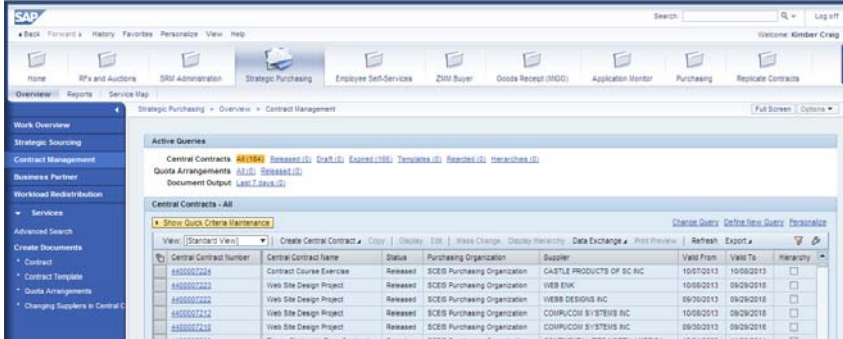
- Upon completion of this lesson, you should be able to:
  - Change Valid From/To dates on a contract.
  - Change the Target Value on a contract.
  - Change Purchasing Group on a contract.
  - Change a price on a contract.
  - Change a vendor on a contract.

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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).



Central Contract Number	Central Contract Name	Status	Purchasing Organization	Supplier	Valid From	Valid To	Hierarchy
4400002248	Contract Course Exercise	Released	SCES Purchasing Organization	CASTLE PRODUCTS OF SC INC	10/07/2013	10/08/2013	
4400002249	Web Site Design Project	Released	SCES Purchasing Organization	WEBB DESIGN INC	09/30/2013	09/30/2016	
4400002250	Web Site Design Project	Released	SCES Purchasing Organization	COMPUCON SYSTEMS INC	10/08/2013	09/28/2016	
4400002251	Web Site Design Project	Released	SCES Purchasing Organization	COMPUCON SYSTEMS INC	09/30/2013	09/28/2016	

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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



- 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



- 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](http://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. 440007225**

Contract Number 440007225 (Change Version) Smart Number PR235 Instructor RFX for 10/9/2013 Contract Type Agency Value Cont. Status In Process  
 Supplier 700000458.BGD.TESEWORKS Contract Owner 40339.KIMBER.CRAIG

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

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	91004	1		EA	100.00	100.00	USD	
	Normal					0.000			0.00	0.00	USD	
	Normal					0.000			0.00	0.00	USD	
	Normal					0.000			0.00	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


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 PR236 Instructor RFx for 10/9/2013    Contract Type Agency Value Cont.    Status Released  
 Supplier [700000458 RGB TERPWORKS](#)    Contract Owner [40339 KIMBER CRAIG](#)

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## Change of Vendor cont



- 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



- ◆ **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




## 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



**Display Agency Value Cont. 440007233**

Close Release Edit Copy Check Renew Print Preview Export Related Links

Contract Number: 440007233    Smart Number: Contract Assignment for Building Cleanin    Contract Type: Agency Value Cont.    Status: Released  
 Supplier: 7000057903 CASTLES ENGINEERING INC    Contract Owner: #0339 KIMBER CRAIG

Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking

**Notes**

Add Clear Filter Settings

Assigned To	Category	Text Preview
Document Header	Vendor Text	This solicitation is open for administrative purposes on ...
Item01"PR235 Exercise 1 - Building Cleaning"	Vendor Text (Item)	Clean the SC Statehouse to remove dirt & grime from the ...
Item02"PR 235 Exercise 1 - Security Services"	Vendor Text (Item)	Additional Security Services during exterior cleaning of ...

**Attachments**

Add Attachment Edit Description Versioning Delete Create Qualification Profile Filter Settings


Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Legal Document	Solicitation	Solicitation	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	doc	188	KIM14578	10/09/2013
Document Header	Legal Document	Responses Report	Responses Report	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	38	KIM14578	10/09/2013
Document Header	Legal Document	Reviewers Check List	Reviewers Check List	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	65	KIM14578	10/09/2013
Document Header	Legal Document	Solicitation	Solicitation	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdf	111	KIM14578	10/09/2013
Document Header	Standard Attachment	IFB 5400006722	IFB 5400006722.doc	1		<input type="checkbox"/>	<input type="checkbox"/>	doc	181	KIM14578	10/09/2013

- 🕒 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

  
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▼ Attachments

[Add Attachment](#) | [Edit Description](#) | [Versioning](#) | [Delete](#) | [Create Qualification Profile](#)

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out
Document Header	L	Add Attachment				<input type="checkbox"/>	
Document Header	L					<input type="checkbox"/>	
Document Header	L					<input type="checkbox"/>	
Document Header	L					<input type="checkbox"/>	
Document Header	S					<input type="checkbox"/>	

Here you can upload an attachment. You have to assign it to either the document general data or to an item

Assign To: \* General Data

File:


Description:


Visible Internally only:  Keep this attachment internal

- 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


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

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**Lesson 3 Summary**



- 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



- ④ 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



- ④ Normal contracts list specific line items and specific pricing.
- ④ Pricing needs to be updated on each line item as the price changes.
- ④ Shopping cart users select the specific line item, and the line item description & price are populated from the contract into the shopping cart.
- ④ All contracts created from an RFx are Normal contracts.

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## Product Category Contracts



- 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



- ◆ **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.

**Display Agency Value Cont. 4400007188**

Close Release Edit Copy Check Renew Print Preview Export Related Links

Contract Number 4400007188 Smart Number Contract Replication Inventory Contract Type Agency Value Cont. Status Released  
 Supplier 2900169332 TALKPOINT TECHNOLOGIES, INC Contract Owner 49339 KIMBER CRANG

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

**Details for Selected Item 1: PHONE ANALOG DESK KXTS32826 BLACK**

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

**Basic**

**Identification**  
 Item Number: 1  
 Item Type: Material  
 Item Category: Normal  
 Product ID: 127331  
 Description: PHONE ANALOG DESK KXTS32826 BLACK  
 Product Category: 83984 Telephone Dialing Answering Apparatus

**Currency, Values and Pricing**  
 Target Value/ Currency: 0.00 USD  
 Target Quantity/ Unit: 1 EA ( 1 EA )  
 Price: 84.00 USD per 1 EA  
 Tax Code:  
 Alert Release Quantity: 0 %  
 Not Separately Priced:

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## 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.

Home RFx and Auctions SRM Administration Strategic Purchasing Employee Self-Service ZRM Buyer Goods Receipt (RGC) Application Monitor Purchasing Replicate Contracts

Replicate SRM Contract Line Items Test

Replicate Contracts > Replicate SRM Contract Line Items Full Screen Opt

**Replicate SRM Contract Line Items**

Contract Selections

Contract Number	440000718	to		
Item Number	127331	to		
Existing Plant	IT03	to		
New Plant	IT04	to		

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## Lesson 4 Summary



- 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



## Lesson 5 Learning Objectives




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- 🕒 Upon completion of this lesson, you should be able to:
  - Determine usage for a specific Contract.

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## Release Value



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- 🕒 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 500008818**

Close Release Edit Copy Check Renew Print Preview Export Related Links

Contract Number: 500008818    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: 500008818	Contract Name: Statewide Term Contract Office Supplies
Supplier: * 7000122678 STAPLES BUSINESS ADVANTAGE	Contract Owner: 3072 Theresa Watts
Valid From / To: * 01/01/2009 - 12/31/2013	Target Value/ Currency: 5,000,000.00 USD
Purchasing Organization: * SCEIS Purchasing Organization	Release Value: 75,567.05 USD
Purchasing Group: * MMO - T. Watts <a href="#">Show Members</a>	Basic Contract: <input type="checkbox"/>

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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.

**Display MMO Value Contract 500008818**

Close Release Edit Copy Check Renew Print Preview Export Related Links

Contract Number: 500008818 Smart Number: Statewide Term Contract Office Supplies Contract Type: MMO Value Contract Status: Released  
 Supplier: 200122578 STAPLER BUSINESS ADVANTAGE Contract Owner: 3372 Theresa Walli

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

History View: United States Dollar Filter Settings

Document	Name	Document Number	Back-End Document Number	Status	Date	Value	Currency
Contract	Statewide Term Contract Office Supplies	500008818		Released	09/17/2013	5,000,000.00	USD
Purchase Order	IT012A DHEC	6500286123	4600286123	Ordered	09/19/2013	51.21	USD
Purchase Order	IT124A HHS	6500286124	4600286124	Ordered	09/19/2013	6,005.00	USD
Purchase Order	Local Purchase Order1 KM14578 09/23/201	6500286140		Saved	09/23/2013	677.22	USD
Purchase Order	PO Exercise 1	6500286181	4600286181	Ordered	09/25/2013	970.82	USD
Purchase Order	Creat PO #2 KRI	6500286185	4600286185	Ordered	09/25/2013	970.82	USD
Purchase Order	PO Exercise 2	6500286192		Ordered	09/25/2013	970.82	USD
Purchase Order	PO Exercise 2	6500286190		Ordered	09/25/2013	900.00	USD
Purchase Order	PO Exercise 3	6500286194		Ordered	09/25/2013	970.82	USD
Purchase Order	ZBPO Blanket Agreement PO	6500286195		Ordered	09/25/2013	970.82	USD

Status

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## Lesson 5 Summary



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

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## Course Summary



- 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



- ➊ 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



***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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