

Procurement Contracts 101

Teresa Page

Procurement Contracts

- Procurement Contract functionality allows you to enter basic contract information in to PeopleSoft, once the contract has been finalized, so that you can track spend against it.
- This functionality does NOT assist in the creation of or execution of a contract.

Procurement Contracts

- Institutions will use a shared SetID for procurement contracts – ‘POCON’.
 - Institutions will add/maintain their agency contract information in the POCAN SetID.
 - Institutions will need a Contract Administrator. This person will add/maintain the agency contract information.
 - Contract Admins will have authority to view and edit any contract entered in the POCAN SetID, even if it was entered by a different institution. Admins will need to be careful to only update contracts that have been entered for their institution.
- USG & Statewide contracts will be added/maintained by the system office in the POCAN SetID.

Procurement Contracts

- Institutions must use the SHARE SetID suppliers in order to use the procurement contract functionality.
 - Procurement Contracts entered by the Institution will have a Contract ID that begins with the first 2 digits of their Business Unit. The contract ID field allows for 25 characters.
 - USG contracts that are available for all to use will begin with a different identifier.
 - Statewide Contract ID's will not be changed and will be entered into the system in the same format as they are received.

Procurement Contracts

Security Roles & User Preferences

- Roles:
 - BOR_PO_CONTRACT_ADMIN – Contract Administrator
 - BOR_PO_CONTRACT_INQUIRY – Those who need inquiry access for Procurement Contracts
 - BOR_PO_CONTRACT_REPORTS – Those who need access to reports
- User Preferences:
 - Procurement link > Contract Process link – here you will define default options as well as the type of action a Contract Admin can take

Contract Entry

[Find an Existing Value](#)

Add a New Value

SetID

Contract ID

Style ID

Contract Process Option

Add

[Find an Existing Value](#) | [Add a New Value](#)

Contract Entry

[Find an Existing Value](#)

[Add a New Value](#)

SetID

Contract ID

Style ID

Contract Process Option

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Contract Entry

Contract

SetID POCON [Copy From Contract](#)

Contract ID 98TESTCONTRACT

*Status

Administrator/Buyer

Contract Version

Version 1

Status Current

Approval Due Date

▼ Header

*Contract Style

Process Option General Contract

*Supplier [Supplier Search](#)

*Supplier ID

*Begin Date

Expire Date

Renewal Date

Currency

Primary Contact

Supplier Contract Ref

Description

Master Contract ID

Tax Exempt ID

- [Add Comments](#)
- [Contract Activities](#)
- [Primary Contact Info](#)
- [Contract Releases](#)

- [Activity Log](#)
- [Document Status](#)
- [Thresholds & Notifications](#)

Amount Summary

Maximum Amount	<input type="text" value="0.00"/>	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Total Released Amount	0.00	

Tax Exempt

Contract Entry

Contract

SetID POCON [Copy From Contract](#)
Contract ID 98TESTCONTRACT
*Status Open

Contract Version

Version 1

Status Current

[New Version](#)

Approval Due Date

Administrator/Buyer

▼ Header ?

*Contract Style General Contract

Process Option General Contract

*Supplier

[Supplier Sea](#)

*Supplier ID

*Begin Date 09/19/2019

Expire Date

Renewal Date

Currency USD CRRNT

Primary Contact

Supplier Contract Ref

Description

Master Contract ID

Tax Exempt ID

Tax Exempt

[Add Comments](#)
[Contract Activities](#)
[Primary Contact Info](#)
[Contract Releases](#)

[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)

Maximum Amount	0.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Total Released Amount	0.00	

Thresholds & Notifications

Send Date/Amount Notification

[Expand All](#)

[Collapse All](#)

▼ Date Notification

Notify User when contract is within specified days of Expire Date.

Expire Date

Notify Days Before Expires

Expiration Notification Date

Notify User when contract is within specified days of Renewal Date.

Renewal Date

Notify Days Before Renewal

Renewal Notification Date

Notify User when New Contract or Draft is within specified days of Approval Due Date.

Approval Due Date

Notify Days Before Approval

Approval Notification Date

▼ Maximum Amount Notification

Notify User when the total contract released amount is either within the specified amount , or within the specified percentage, of the maximum contract amount.

Amount Less than Maximum

USD

Percent Less than Maximum

Notification Amount





▼ Notification Assignments

☰ 🔍 | 1-1 of 1 | View All

	Notification Type	User ID	User Description	Email Address			
1	<input type="text" value=""/> ▼	<input type="text" value=""/> 🔍			<input type="button" value="+"/>	<input type="button" value="-"/>	

▼ Amount Summary

Maximum Amount USD

Total Line Released Amount 0.00

Total Category Released Amount 0.00

Open Item Released Amount 0.00



▼ **Order Contract Options** ?

Allow Multicurrency PO

Corporate Contract

Lock Chartfields

[PO Defaults](#)

Allow Open Item Reference

Adjust Supplier Pricing First

Price Can Be Changed on Order

[Add Open Item Price Adjustments](#)

Must Use Contract Rate Date

Auto Default

*Dispatch Method

Print

[Price Adjustment Template](#)

Rate Date 09/19/2019





Contract Items

[Catalog Search](#) [Item Search](#) [Search for Contract Lines](#)

Lines

Details [Order By Amount](#) [Item Information](#) [Default Schedule](#) [Release Amounts](#) [Release Quantities](#) [Line Groupings](#)

Line	Item	Description	UOM	Category	Merchandise Amt
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[View Category Hierarchy](#) [Category Search](#)



Details for Line 1

Expand All

Collapse All

Item Information

Release Amounts / Quantities

Pricing Information

Use Contract Base Price

Price Can Be Changed on Order

Use Supp Price UOM Adjustments

Use Supplier Price Shipto Adj

Price Due Date

Date

Due Date

Adjust Before Contract Adjustments

Price Qty

Line Quantity

Order By Amount

Amount Only

Qty Type

Current Order Quantity

Merchandise Amount

Schedule Defaults

Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.

UOM/Pricing

	Price Loc	UOM	Base Price	Curr		
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	0.00000	USD	<input type="text"/>	<input type="text"/>

Enter the lead times and schedule quantities to be used for contract generated purchase order releases. Quantity is in standard UOM, and will be converted to the UOM that is selected as the Release Default at the time of release.

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary


Business Unit BOARD OF REGENTS
*Requester T.Page OIIT
*Currency
Requisition Name
Priority

Cart Summary: Total Amount 10.00 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details
1	Test PO CON item		Adobe Systems, Incorporated	1.0000	Each	10.0000	10.00	
							Total Amount	10.00 USD

Select All / Deselect All Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Shipping Summary

[Edit for All Lines](#)
Ship To Location
Address
Attention To: T.Page OIIT
Comments

Requisition Comments and Attachments

Enter requisition comments

 Send to Supplier Show at Receipt Shown at Voucher [Add more Comments and Attachments](#)

Line Details

Line Details

No Image Line 1 Test PO CON item Line Status Pending

Item Details

Merchandise Amount 10.00 USD RFQ Required
Item ID Device Tracking
Category 00500 Zero Price Indicator
Original Substituted Item Description Amount Only
Physical Nature Inspection Required
Buyer [Buyer Information](#)
[Configuration Info](#)

Contract Information

Use Contract if Available
Contract ID [Contract Details](#)
Version
Contract Line
Category Line

Supplier Information

Supplier ID Adobe Systems, Incorporated
Supplier Location Main



Line Details

Line Details

No Image

Line

1



Test PO CON item

Line Status

Pending

Item Details

Contract Information

Use Contract if Available

Contract ID

Contract Details

Version

Contract Line

Category Line

Line Details

Help

Line Details ?

No Image

Line

1



Test PO CON item

Line Status

Pending

Item Details ?

Contract Information ?

Use Contract if Available

Contract ID

Contract Details

Version

Contract Line

Category Line

Supplier Information ?

Supplier ID

Supplier Location

Suggest New Supplier

Supplier Item ID

Look Up Contract ID

Help

SetID

POCON

Contract ID

begins with

Short Supplier Name

begins with

Description

begins with

Look Up

Clear

Cancel

Basic Lookup

Search Results

View 100

First 1 of 1 Last

Supplier SetID	Supplier ID	Contract ID	Short Supplier Name	Contract Status	Description	Contract Beginning Date
SHARE	0000032028	USG-SS-47200-17008	ADOBE-001	Approved	USG-SS-47200-17008	02/20/2019



interactUSG

Line Details

Line Details 

No Image

Line

1



Test PO CON item

▶ Item Details 

▼ Contract Information 

Use Contract if Available

Contract ID   

Contract Details

Version

Contract Line 

Category Line 



Line Details

Line Details 

No Image

Line

1



Test PO CON item

▶ Item Details 

▼ Contract Information 

Use Contract if Available

Contract ID   

Contract Details

Version

Contract Line 

Category Line 



Maintain Purchase Order

Purchase Order

Business Unit 98000

PO ID NEXT

Copy From

- Contract
- Purchase Order
- Requisition

PO Status Initial

Budget Status Not Chk'd

Hold From Further Process

▼ Header ?

*PO Date 09/20/2019

Supplier Search

*Supplier

Supplier Details

*Supplier ID

*Buyer

PO Reference

Doc Tol Status Valid

Receipt Status Not Recvd

*Dispatch Method

Amount Summary ?

Header Details

Activity Summary

PO Defaults

Add Comments

PO Activities

Add ShipTo Comments

▼ Actions

Merchandise 0.00

Freight/Tax/Misc. 0.00

Total Amount 0.00 USD

Add Items From ?

Catalog

Item Search



Maintain Purchase Order

Purchase Order

Business Unit 98000

PO ID NEXT

Copy From Contract

PO Status Initial

Budget Status Not Chk'd

Hold From Further Processing

▼ Header ?

*PO Date 09/20/2019

*Supplier

*Supplier ID

*Buyer

PO Reference

Header Details

PO Defaults

PO Activities

▼ Actions

Activity Summary

Add Comments

Add ShipTo Com

Add Items From ?

Catalog

Purchasing Kit

Item Search

Lines ?

Details Ship To/Due Date Statuses Item Information Attr

Line	Item	Description
------	------	-------------

Copy Purchase Order from Contract

Contract Selection Criteria

Contract SetID POCON

Contract ID usg-ss

Allow Open Item Contract Only

Search

Select Contract

Contracts More Details

Select	SetID	Contract
--------	-------	----------

OK

Cancel

Refresh

Look Up Contract ID

SetID POCON

Contract ID begins with USG-SS

Look Up

Clear

Cancel

Basic Lookup

Search Results

View 100

First 1-3 of 3 Last

Contract ID	Supplier Set ID	Supplier ID	Short Supplier Name
USG-SS-47200-501544	SHARE	0000029567	CAMPUSLOGI-001
USG-SS-47200-17033	SHARE	0000006112	TOUCHNETIN-001
USG-SS-47200-17020	SHARE	0000003805	ELLUCIAN-002



Maintain Purchase Order

Purchase Order

Business Unit 98000

PO ID NEXT

Copy From

PO Status Initial

Budget Status Not Chk'd

Hold From Further Processing

▼ Header ?

*PO Date 09/20/2019

[Supplier Search](#)

Doc Tol Status Valid

*Supplier

[Supplier Details](#)

*Supplier ID

Receipt Status Not Recvd

*Buyer

*Dispatch Method

PO Reference

Amount Summary ?

[Header Details](#)

[Activity Summary](#)

Merchandise 0.00

[PO Defaults](#)

[Add Comments](#)

Freight/Tax/Misc. 0.00

[PO Activities](#)

[Add ShipTo Comments](#)

Total Amount 0.00 USD

▼ Actions

Add Items From ?

[Catalog](#)

[Item Search](#)

[Purchasing Kit](#)

Lines ?

Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving					
Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line	Release				
1	<input type="text"/>	<input type="text"/>	POCON	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>				

[View Printable Version](#)

[View Approvals](#)

*Go to



Maintain Purchase Order

Purchase Order

Business Unit 98000

PO ID NEXT

Copy From

▼ Header ?

*PO Date 09/20/2019

Supplier Search

*Supplier

Supplier Details

*Supplier ID

*Buyer

PO Reference

Amount

Header Details

Activity Summary

PO Defaults

Add Comments

PO Activities

Add ShipTo Comments

▼ Actions

Add Items From ?

Catalog

Item Search

Purchasing Kit

Lines ?

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Re

Line	Item	Description
1	<input type="text"/>	<input type="text"/>



View Printable Version

View Approvals

Close Short All Lines

*Go to ... More ...

Contract Search

Search Criteria

SetID POCON

Supplier SetID SHARE

Contract ID

Supplier ID

Contract Style

Item SetID SHARE

Contract Process Option

Item ID

Description

Item Description

Master Contract ID

Category

Contract Reference Type

Corporate Contract

PO Date 09/20/2019

Search

Clear

▼ Contract Details

Personalize | Find | View All | First 1 of 1 Last

Item Detail	Contract Reference	Contract Detail						
Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price	Use Contract Base Price
<input type="checkbox"/>	USG-SS-47200-17008	1	Line Item	92007		Software	5.00000	Y

OK

Cancel

Refresh



Procurement Contracts

- When can I start?!
 - Institutions should plan to test in the FPLAY environment.
 - Institutions to let ITS know when they are ready to begin testing.

Questions?