PC.010.010 – ADDING A PROCUREMENT CONTRACT

Purpose	• To understand the security role and user preferences required to enter a Procurement Contract. • To identify the correct SetID in which to enter Procurement Contracts. • To add a procurement contract
Description	PeopleSoft Procurement Contract functionality enables users to manage contract information and easily track Purchase Order spend for a contract. Contracts fall into one of three categories: Agency, Statewide, and University System of Georgia (USG). Institutional Contract Admins are responsible for adding and maintaining institution-specific contracts (Agency). Statewide contracts are entered by the University System Office (USO) for all institutions to reference on procurement transactions. USG contracts are entered by USO for institutions to reference contract documentation, but not to reference on procurement transactions. Additionally, Procurement Contracts for all institutions are entered in to the POCON SetID. Since this is a shared SetID, institutions have access to contracts they did not enter. It is imperative users only update agency contracts for their specific institution.
Security Role	**BOR_PO_CONTRACT_ADMIN**
Assumptions	• Institution uses SHARE SetID suppliers • User was granted the following User Preferences, via the Contract Process page (Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Procurement > Contract Process): **Contract Process box:** ○ Approve Contracts ○ Enter Contracts/New Version ○ Hold Contracts ○ Close Contracts ○ Cancel Contract

	Default Display box: ○ Process Option: GN ○ Contract Style: GN ○ All other boxes should have Open as the value
Dependencies/ Constraints	An institution must use SHARE Suppliers to create a Procurement Contract.
Additional Information	• If users need to modify a contract after it was approved, users must change the status back to *Open*. • Only contracts with an *Approved* status are eligible to be referenced on procurement transactions.

Procedure

Below are step by step instructions are how to add a Procurement contract.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Procurement Contracts** link.
4.	Click the **Add/Update Contracts** link.
5.	Click the **Add a New Value** tab.
6.	Enter **"POCON"** in the **SETID** field.
7.	Enter the Agency Contract ID into the **Contract ID** field by entering the first 2 numbers of the Business Unit followed by the contract/solicitation number (ex. 83-GDC000721). ***Note**: University System of Georgia & Statewide contracts are entered by the University System Office.*
8.	Verify Style ID is **GN**.
9.	Verify Contract Process Option is **General Contract.**
10.	Click the **Add** button. The system navigates to the Contract Entry page.
11.	Verify the **Status** defaulted to *Open*, as only contracts in an *Open* status can be modified.
12.	Enter or Search via the spyglass icon for the **Administrator/Buyer**.
13.	Select a Supplier by entering the supplier name or Supplier ID in the **Supplier or Supplier ID** fields, or search for a supplier by clicking on the spyglass icon.
14.	Enter the contract **Begin Date**.
15.	Enter the contract **Expire Date**, if applicable. This field may be left blank.
16.	Enter the contract **Renewal Date**, if applicable. This field may be left blank.
17.	Enter Contract ID into the **Description** field. Information entered into the Description field flows to the Purchase Order Reference field on the Purchase Order.
18.	If a Master Contract exists, enter the ID into the **Master Contract ID** field.
19.	If needed, enter the **Tax Exempt ID** into the field and select the **Tax Exempt** box.

Step	Action
20.	Enter the maximum amount of the contract in the **Maximum Amount** field. ***Note:*** *If no maximum amount is defined in the contract, leave this field as 0.00 USD.*
21.	Enter comments & attachments by clicking on the **Add Comments** link. ***Note:*** *If users have multiple attachments to add, click the Plus button (next to the Inactivate button) to add a new row for each attachment.*
22.	Click on the **Contract Activities** link to add activities. Use this functionality to create a notation for a particular activity. The information on this page can be used as a tickler file. Users can organize activity comments by logging the due date and selecting the **Done** check box.
23.	Leave the **Contract Release** field blank, as this functionality is not supported at this time.
24.	Click the **Activity Log** link to view basic transaction activity information, including the date the log was entered, modified and approved.
25.	Click the **Document Status** link to view procurement documents associated with the contract.

Step	Action
26.	Click on the **Thresholds & Notifications** link and a popup window appears. The Threshold & Notifications window allows users to define specific date and amount notification criteria. The information entered in this section routes notifications to buyers when the contract limits are met. If users need to receive any emailed notifications, check the **Send Date/Amount Notification** box. The following are email notification options: • If users need a notification before the contract expires/renews, click the Expand triangle icon to the left of "**Date Notification."** Enter the Expire Date and Renewal Date into the corresponding fields. Specify the desired number of days in the **'Notify Days Before Expires/Renewal'** boxes. Leave the Contract Approval field blank, as this functionality is not currently supported. • If users need to be notified when the total contract released amount is within the maximum contract, click the Expand triangle icon to the left of "**Maximum Amount Notification**." Either enter amount in the **Amount Less than Maximum** field or the percentage in **Percent Less than Maximum** field. • If users need to be notified when a contract reaches its defined threshold, click the Expand triangle icon to the left of **Notification Assignments.** Select the **Notification Type** (Expiration, Maximum Amount or Renewal) and specify the **User ID** of the person who will be notified. Once the User ID is specified, the User Description and Email Address populate. ***Note 1:*** *Before creating a notification, the system checks worklist and creates a new notification only if one does not already exist.* ***Note 2:*** *The recipient's email address must exist on their user profile in order for an email notification to be sent to him/her. Contact a local Security Administrator if the recipient's email address does not auto populate.*
27.	Click the **OK** button. The system navigates back to the Contract Entry page.
28.	Scroll down to the Order Contract Options section. Verify the Allow **Multicurrency PO** and **Corporate Contract** boxes are checked. Check the **Allow Open Item Reference** box. ***Note:*** *The PO Defaults, Add Open Item Price Adjustments, and Price Adjustment Template links should not be used at this time.*

Step	Action
29.	If users want the Contract ID to automatically populate on a transaction whenever the Supplier defined on the contract is used, check the **Auto Default** box**.** ***Note:*** *Auto Default should be selected for all Statewide contracts.*
30.	The **Voucher Contract Options** functionality is not supported at this time and the fields in this section should not be populated.
31.	The **Contract Items** section should be populated if it is necessary to track spend by contract line item. See **Business Process PC.010.011 – Adding Contract Items to a Procurement Contract** for additional information on how to use this section.
32.	The **Contract Categories** functionality is not supported at this time and the fields in this section should not be populated.
33.	Click on the **Save** button to save the Contract. The Contract will be saved with a status of *Open*.
34.	Once users complete all contract entry, change the contract **Status** to *Approved* and click the **Save** button. This allows the contract to be referenced on a Requisition or Purchase Order.