PC.010.011 - ADDING CONTRACT LINE ITEMS TO A PROCUREMENT CONTRACT

Purpose	• Understand security role and user preferences required to enter a procurement contract. • Identify the correct SetID field to enter Procurement Contracts. • Add a procurement contract with contract items
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: o **Verify you have access to the following options under the Contract Process Box:** ▪ Approve Contracts ▪ Enter Contracts/New Version ▪ Hold Contracts

	▪ Close Contracts ▪ Cancel Contract ○ **Set the Default Display Box to the following settings:** ▪ 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 on how to create a purchase order contract with items.

Step	Action
1.	Follow business process PC.010.010 – Adding A Procurement Contract to create a procurement contract.
2.	Verify the **Status** lists the contract as *Open*.
3.	Navigate down to the **Contract Items Section**.
4.	To add a line to the contract, enter the Description, UOM and Category. If needed, enter the Merchandise Amount as well.
5.	Click on the **Line Details icon** (between the Line and Item columns).
6.	Expand the **Pricing Information** section.
7.	View the **Use Contract Base Price** to verify it is checked by default. If not checked, put a check mark in box.
8.	Check the **Price Can Be Changed On Order** box. Checking this box makes the UOM/Pricing section available for editing.

Step	Action
9.	Navigate to the **Schedule Defaults** section to enter a value into the Base Price field. This price defaults onto the Purchase Order each time a user copies the contract into a Purchase Order, and can be changed on the Purchase Order if needed. Enter a value into the Base Price field for the contract to appear in search results when copying a contract to create a Purchase Order. ***Note****: users must enter a value greater than $1 in the Base Price field for the Procurement Contract to appear in the search results.*
10.	At this time the **Contract Categories** functionality is not supported and the fields in this section should not populate.
11.	Click on the **Save** button to save the Contract. The Contract saves with an *Open* status.
12.	Once all contract entry is complete, navigate up to the **Status** field and change the contract status to *Approved*.
13.	Navigate down and click the **Save** button. Now users can reference the contract on a Requisition or Purchase Order.