

Team Georgia Marketplace™



Supplier Contracts Management Webinar

Updated Information

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Your instructor



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Basic Flow of Supplier Contracts

Here is the basic flow and life-cycle of Contracts:

- Create a contract as a result of a requisition, a sourcing event, prior competitive solicitation, or non-competitive situation
 - Use the Wizard to Create the Contract

OR

- **Import your State Entity's Contract**
- Setup thresholds and notifications
- Add contract agreements
 - At contract creation
 - During the life of the contract
- Collaborate, approve, dispatch, and execute the contract
- **Add amendments or modifications when necessary**





Webinar Objectives

By completing this webinar you will:



- Import your State Entity's contract as a new Team Georgia Marketplace™ contract
- Amend a contract
- Renew a contract
- Extend a contract
- Close a contract that has expired
- Cancel a contract
 - For cause
 - For convenience

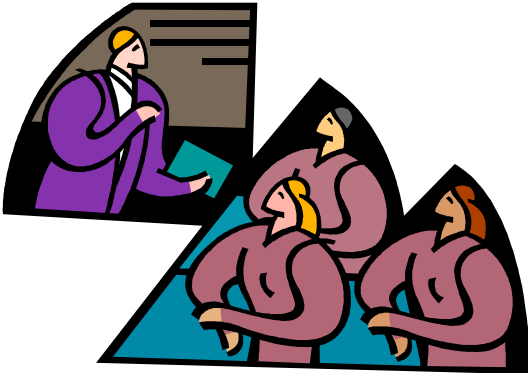


Lesson One: Importing your State Entity Contract



Demo 1:1 Import an Existing Contract

Importing a newly executed contract



- Login as PSMITHXX and enter the password
- Import an existing State Entity (Agency) Contract using the Add New functionality
- Enter the CONTRACT ID using the proper naming convention (42700-023-Existing Contract ID) for the current Pest Control contract
- Enter PSMITHXX for the Administrator
- Enter the Vendor ID, Description, Begin and Expire Date, and Fiscal Year, enter the line information, Payment Term Net 30, enter the Maximum Amount of \$9600.00 and save the contract

Scenario: Contract Administrator Pete Smith needs to import an recently created contract for Pest Control that was awarded to Active Pest for \$9600 using eQuote. The contract began on July 1, 2010 and expires on June 30, 2011



Lesson 1: Import an Existing Contract

To get started, click on Contract Entry

The screenshot shows the TGMP TRAINING FN90TRN web application. The top navigation bar includes links for Home, Worklist, Add to Favorites, and Sign out. The main menu is titled 'Supplier Contracts' and contains three primary sections: 'Create Contracts and Documents', 'Monitor and Update Agreements', and 'Manage Contract Library'. The 'Create Contracts and Documents' section includes a 'Contract Entry' link, which is highlighted with a red box. A red arrow points from this link to a yellow callout box containing the following instructions:

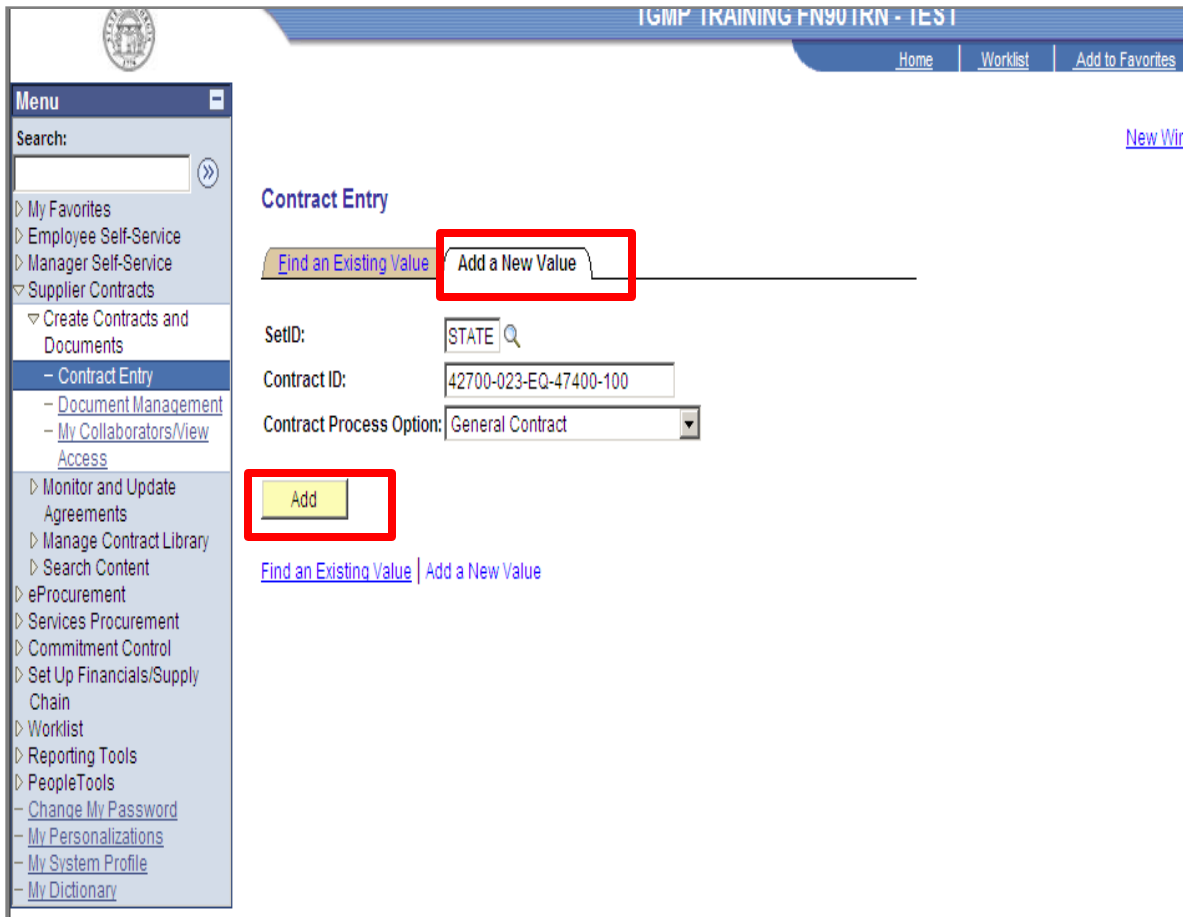
1. Click on Supplier Contracts
2. Then Click on Create Contracts and Documents
3. Then Click on Contract Entry



Lesson 1: Import an Existing Contract

Contract Entry – Enter the Contract ID

Creating or Importing a Contract that was not Sourced in Team Georgia Marketplace™ begins with Add A New Value



Enter the Contract ID:

42700-023-EQ-
47400-100

(Business Unit-Origin-
Existing Contract ID)

**Always leave SetID
as State**



Lesson 1: Import an Existing Contract Header and Lines Sections

Sections of the Contract

The screenshot displays the 'Contract' page in a web application. The top navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. The main content area is divided into two main sections: 'Contract Header' and 'Contract Lines'.

Contract Header Section:

- Contract Information:** SetID: STATE, Contract ID: 42700-023-EQ-47400-100, Status: Open.
- Administrator:** PSMITH01, PETER SMITH01.
- Process Option:** General Contract.
- Vendor:** ACTIVE PEST CONTROL OF MIDDLE GA INC.
- *Begin Date:** 07/01/2010, **Expire Date:** 06/30/2011, **Currency:** USD.
- Maximum Amount:** 9,600.00 USD.
- Line Released:** 0.00, **Open Item Relsd:** 0.00, **Total Released Amount:** 0.00.
- Description:** Pest Control.
- *Tax Exempt:** STATE OF GA, **Fiscal Year:** 2011.

Order Contract Options:

- Allow Multicurrency PO
- Corporate Contract
- Lock Chartfields
- Allow Open Item Reference
- Adjust Vendor Pricing First
- Price Can Be Changed on Order
- Must Use Contract Rate Date
- Rate Date:** 07/09/2010
- Initial Period Renewals
- Non-Profit

PO Defaults: PO Open Item Pricing

Invoice Information:

- Gross Amount:** 0.00 USD
- Freight Amount:** 0.00
- Sales Tax Amount:** 0.00
- VAT Amount:** 0.00
- Misc Charge Amount:** 0.00

Contract Lines Section:

Line	Item	Description	UOM	Category CD	Merchandise Amt	Include for Release	Status
1		Pest Control	MOH	91059	9600	<input checked="" type="checkbox"/>	Active

At the bottom of the interface, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', 'Update/Display', and 'Correct History'.

- Contract Header**
- Administrator
 - Vendor ID
 - Begin Date
 - Expire Date
 - Description
 - Tax Exempt
 - Fiscal Year
 - Uncheck Multicurrency
 - Uncheck Corporate Contract
 - Initial Period Left Alone
 - PO Defaults for BU
 - Payment Terms
 - Maximum Amount
 - Thresholds and Notifications
 - Contract Agreement(s)
 - Add Comments

- Contract Line(s) (if not using Allow Open Item Reference)**
- Description
 - UOM
 - Category CD
 - Merchandise Amt



Lesson 1: Import an Existing Contract Header and Lines Sections-Assign to Business Unit

Every State Entity Contract must be assigned to the Business Unit

IGMP TRAINING FN90 TRN - TEST

Home Worklist Add

Vendor: ACTIVEPEST-001 [Vendor Search](#) [Contract Activities](#) [Document Status](#)
 *Vendor ID: 0000438587 [ACTIVE PEST CONTROL OF MIDDLE GA INC](#) [Primary Contact Info](#) [Thresholds & Notifications](#)
 *Begin Date: 07/01/2010 [Contract Agreement](#)
 Expire Date: 06/30/2012
 Currency: USD [CRRNT](#)
 Primary Contact:
 Vendor Contract Ref:
 Description: Pest Control
 Master Contract ID:
 Tax Exempt STATE OF GA Fiscal Year: 2011

Amount Summary	
Maximum Amount:	9,600.00 USD
Line Released:	0.00
Open Item Relsd:	0.00
Total Released Amount:	0.00
Remaining Amount:	9,600.00
Remaining Percent:	100.00

Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date
 Corporate Contract Adjust Vendor Pricing First Rate Date: 07/06/2010
 Lock Shortfields Price Can Be Changed on Order Initial Period [Renewals](#)
 Non-Profit

[PO Defaults](#) [PO Open Item Pricing](#)

Voucher Contract Options

Invoice Number: Gross Amount: 0.00 USD
 Freight Amount: 0.00



Lesson 1: Import an Existing Contract Header and Lines Sections-Assign to Business Unit

Validate the correct business unit is entered, click ok

TGMP TRAINING FN90TRN - TEST

Home Worklist Add to Favorites Sign o

[New Window](#) [Customize Page](#)

Contract Entry

PO Defaults

SetID: STATE Contract ID: 42700-023-EQ-47400-100 Vendor ID: 0000438587

Header

*Business Unit: 42700

[Copy from BU Defaults](#)

Buyer:

Origin: 014

Currency: USD CRRNT

Payment Terms ID: N30

Billing Location: PO_0000001

Tax Exempt 56700047K

Shipping Information

Ship To: [Ship To Address](#)

Location:

IN Unit:

Freight Terms: DN

Ship Via:

Charge By: Quantity

AM Business Unit:

Capitalize

Profile ID:

Cost Type:

Ultimate Use Code:

Where Performed:

*GL Unit	Account	Fund	Dept	Fund Src	Program	Class	PC Bus Unit	Project	Activity	Source Type
42700 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Add Comments](#)

Validate the correct business unit is entered

If this step is not done, the contract cannot be linked to a PO

DO NOT CLICK CANCEL



Lesson 1: Import an Existing Contract

Add a Document

Save the Header and Line(s) and click Add a Document

TGMP TRAINING FN90 TRN - TEST

Home | Worklist | Add to Favorites

SetID: STATE *Status: Open

Contract ID: 42700-023-EQ-47400-100

Administrator: PSMITH01 PETER SMITH01 Add a Document

▼ Header

Process Option: General Contract [Add Comments](#) [Activity Log](#)

Vendor: ACTIVEPEST-001 [Vendor Search](#) [Contract Activities](#) [Document Status](#)

*Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC [Primary Contact Info](#) [Thresholds & Notifications](#)

*Begin Date: 07/01/2010 [Contract Agreement](#)

Expire Date: 06/30/2011

Currency: USD CRRNT

Primary Contact:

Vendor Contract Ref:

Description: Pest Control

Master Contract ID:

Tax Exempt STATE OF GA Fiscal Year: 2011

Amount Summary

Maximum Amount:	9,600.00	USD
Line Released:	0.00	
Open Item Relsd:	0.00	
Total Released Amount:	0.00	

▼ Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date

Adjust Vendor Pricing First



Lesson 1: Import an Existing Contract

Add a Document

Select Document Type and then Import Document

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign o

[New Window](#) | [Customize Page](#) |

Menu

Search:

- My Favorites
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
- eProcurement
- Services Procurement
- Commitment Control
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools
- [Change My Password](#)
- [My Personalizations](#)
- [My System Profile](#)
- [My Dictionary](#)

Create Document

Source: Purchasing Contracts [Return to Document Search](#)

SetID: STATE Contract ID: 42700-023-EQ-47400-100

Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC

*Document Type: **SPD Agency Services Contract**

Configurator ID: SPD_AGENCY_CNTRCT_SRV [SPD - AGENCY STANDARD CONTRACT - Services](#)

*Description:

*Administrator: [PETER SMITH01](#)

Sponsor:

Department:

Use Wizard Responses from Document. ([Select document](#))

[External Contacts List](#)

[Document View Access](#)

Double click to change...

Select the appropriate Document Type from the drop-down list

Then click Import Document



Lesson 1: Import an Existing Contract

Upload the Document in Draft Status Option

Select Current Contract Document and Status

The screenshot shows the 'IGMP TRAINING FN90TRN - TEST' web application. On the left is a 'Menu' sidebar with options like 'My Favorites', 'Employee Self-Service', and 'Supplier Contracts'. The main area contains a search form with fields for 'Document Type' (SPD Agency Services Contract), 'Sponsor', 'Administrator' (PSMITH01), 'Department', and 'Description' (Pest Control). Below the search form is the 'Import Option' section with four radio buttons: 'Current Contract/Document' (selected), 'Amended Contract', 'Amended Contract and Amendment', and 'Original and Amendment'. At the bottom, the 'Current Version' section shows a table with one row: 'Contract Document' with 'File Name' empty, 'Version' '1.0', 'Status' 'Draft' (highlighted with a red box), 'Status Date' '07/06/2010', and 'Status Time' '10:42AM'. An 'Upload' button (also highlighted with a red box) is next to the row. Below the table, it says 'Prior Version is not applicable' with a dropdown menu showing 'Draft' and 'Executed'.

Select Current Contract Document

Enter Version: 1.0
 Select Status (Draft or Executed)
 Status Date is today's date
 Status Time is current time

Then Upload the document



Lesson 1: Import an Existing Contract Document is Uploaded

Uploaded Document can be Viewed by clicking the blue link

TGMP TRAINING FN90 TRN - TEST

Home Worklist Add to Favorites Sign o

*Administrator: PSMITH01 PETER SMITH01

Department:

*Description: Pest Control

Import Option

- Current Contract/Document
(Current Contract/Document with no formal amendments or history to load.)
- Amended Contract
(Single current contract as fully amended requiring an amendment number. History is optional.)
- Amended Contract and Amendment
(Current contract as fully amended and a current separate amendment summary file. History is optional.)
- Original and Amendment
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

Current Version

Customize | Find | First 1 of 1 Last

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document	Service Contract Small Value.doc	1.00	Draft	07/06/2010	10:42AM	Upload	Clear

Prior Version is not applicable

Done with Import Cancel

Click Done with Import

You will be asked if you are sure you are done with the Import, click Yes



Lesson 1: Import an Existing Contract

Imported Document using Draft Status

When you use Draft Status you need to complete the Contract Process but you can more easily Add Attachments

TGMP TRAINING FN90TRN - TEST

Home Worklist Add to Favorites Sign out

Document Management [Return to Document Search](#)

SetID: STATE Contract ID: [42700-023-EQ-47400-100](#)

Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC

Document Type: SPD Agency Services Contract

Description: Pest Control

Administrator: PETER SMITH01

Sponsor: Department:

[Document Attributes](#)

Version: 1.00 Created On: 07/06/10 10:42AM [Add Attachments/Related Documents](#)

Status: Draft Last Modified On: 07/06/10 11:04AM [External Contacts List](#)

[Send to Contacts](#) [Document View Access](#)

Imported Document

View and Edit Options: **Review and Approval:** **Other Document Actions:**

[View Document](#) [Route for Collaboration](#) [Recreate Document](#)

[Edit Document](#) [Preview Approval](#) [Deactivate Document](#)

[Document Version History](#) [Submit for Approval](#)

Selecting Draft Status

You will be able to immediately Add Attachments

But, you will have to Submit for Approval, Dispatch to Contacts, and Execute the Contract



Lesson 1: Import an Existing Contract

Bypassing Dispatching to Contacts

You can Dispatch to Contacts using email or, if needed, bypass this step by selecting Manual as the Delivery Method

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Customize Page](#) |

Dispatch to Contacts

SetID: STATE Contract ID: 42700-023-EQ-47400-100
Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC

Version: 1.00
Administrator: PETER SMITH01
Administrator Email: fscmtst@sao.ga.gov

*Delivery Method: **Manual**

Send Copy to Administrator
 Set to Checked Out

Files To Be Sent

- Current Document
- Attachments
- Related Documents

Selected	Contact ID	Name	Title	Email ID	Description
<input type="checkbox"/>					

Select All Contacts Clear All Contacts

OK Cancel

Here we are bypassing Dispatching the Contract to the Supplier because the Supplier already has the copy of the executed contract



Lesson 1: Import an Existing Contract

Execute the Contract and Set System to Approved

Execute the Contract and use the Contract ID to return to the Header, then set the System to Approved

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

Document Management

[Return to Document Search](#)

SetID: STATE Contract ID: **42700-023-EQ-47400-100**

Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC

Document Type: SPD Agency Services Contract

Description: Pest Control

Administrator: PETER SMITH01

Sponsor: Department:

[Document Attributes](#)

Version: 1.00 Created On: 07/06/10 10:42AM [Add Attachments/Related Documents](#)

Status: Dispatched Last Modified On: 07/06/10 11:24AM [External Contacts List](#)

[Send to Contacts](#)

Execute Contract

Imported Document

[Document View Access](#)

View and Edit Options: [View Document](#)

Review and Approval: [Approval Details](#)

Other Document Actions: [Recreate Document](#)

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Customize Page](#) | [Help](#)

Contract [Create Release](#) [Review Releases](#)

SetID: STATE *Status: **Approved**

Contract ID: 42700-023-EQ-47400-100

Administrator: PSMITH01 PETER SMITH01

▼ Authored Document

Authored Status: Executed Version: 1.00 Amendment: 0 [Maintain Document](#)

▼ Header

Process Option: General Contract [Add Comments](#) [Activity Log](#)

Vendor: ACTIVEPEST-001 [Contract Activities](#) [Document Status](#)

Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC [Primary Contact Info](#) [Thresholds & Notifications](#)

[Contract Agreement](#)

[Amount Summary](#)



Lesson 1: Import an Existing Contract

Upload the Document using Executed Status

Select Current Contract Document and Status

TGMP TRAINING FN90TRN - TEST

Home Worklist Add to Favorites Sign out

Menu

Search: [] []

- My Favorites
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
- eProcurement
- Services Procurement
- Commitment Control
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools
- Change My Password
- My Personalizations
- My System Profile
- My Dictionary

*Document Type: SPD Agency Services Contract

Sponsor: []

*Administrator: PSMITH01 PETER SMITH01

Department: []

*Description: Pest Control

Import Option

- Current Contract/Document
(Current Contract/Document with no formal amendments or history to load.)
- Amended Contract
(Single current contract as fully amended requiring an amendment number. History is optional.)
- Amended Contract and Amendment
(Current contract as fully amended and a current separate amendment summary file. History is optional.)
- Original and Amendment
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

Current Version Customize | Find | First 1 of 1 Last

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document		1.0	[]	07/06/2010	11:39AM	Upload	Clear

Prior Version is not applicable

Draft
Executed

Select Current Contract Document

Enter Version: 1.0
Select Status (Draft or Executed)
Status Date is today's date
Status Time is current time

Then Upload the document



Lesson 1: Import an Existing Contract Document is Uploaded

Uploaded Document can be Viewed by clicking the blue link

TGMP TRAINING FN90 TRN - TEST

Home | Worklist | A

Department:

*Description:

Import Option

Current Contract/Document
(Current Contract/Document with no formal amendments or history to load.)

Amended Contract
(Single current contract as fully amended requiring an amendment number. History is optional.)

Amended Contract and Amendment
(Current contract as fully amended and a current separate amendment summary file. History is optional.)

Original and Amendment
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

Current Version Customize | Find | First 1 of 1 Last

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document	Service_Contract_Small_Value.doc	1.00	Executed	07/06/2010	11:39AM	Upload	Clear

Prior Version is not applicable

Click Done with Import

You will be asked if you are sure you are done with the Import, click Yes



Lesson 1: Import an Existing Contract Document is Imported in Executed Status

Contract is Executed but documents cannot be attached

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign o

Vendor ID: 0000043861 PEST USA
 Document Type: SPD Agency Services Contract
 Description: Pest Control
 Administrator: PETER SMITH01
 Sponsor: Department:

[Document Attributes](#)

Version: 1.00
 Status: Executed
 Created On: 07/06/10 11:39AM
 Last Modified On: 07/06/10 11:43AM
 Executed On: 07/06/10 11:39:00AM

[Add Attachments/Related Documents](#)
[External Contacts List](#)
[Document View Access](#)

Collaborated On:
 Approved On:
 Dispatched On:

Imported Document

View and Edit Options: [View Document](#)
 Review and Approval:
 Other Document Actions: [Deactivate Document](#)

When you import using Executed instead of Draft, you cannot Add Attachments

To be able to Add Attachments, you have to Reset to Dispatch



Lesson 1: Import an Existing Contract Document is Imported in Executed Status

You cannot upload any attachments!

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Customize Page](#) |

Attachments and Related Documents

SetID: STATE Contract ID: 42700-023-EQ-47400-101
 Vendor ID: 0000043861 PEST USA

Upload a Document Attachment File

Attachments		Customize	Find	First	1 of 1	Last
Files	Description					
Allow for Email	File Name	Title	View	Delete		
<input type="checkbox"/>			View	Delete		

Related Documents		Customize	Find	View All	First	1 of 1	Last
Related Documents	Details						
Allow for Email	Source Transaction	SetID	Ad Hoc ID	Internal	Document Status		
<input type="checkbox"/>	Ad Hoc	STATE			<input type="checkbox"/>		

OK Cancel



Lesson 1: Import an Existing Contract Reset to Dispatch to Add Attachments

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

Vendor ID: 0000043861 PEST USA
 Document Type: SPD Agency Services Contract
 Description: Pest Control
 Administrator: PETER SMITH01
 Sponsor: Department:

[Document Attributes](#)

Version: 1.00 Created On: 07/06/10 11:39AM
 Status: Dispatched Last Modified On: 07/06/10 11:49AM

[Add Attachments/Related Documents](#)

[External Contacts List](#)

[Document View Access](#)

Send to Contacts
 Execute Contract
 Imported Document

Collaborated On:
 Approved On:
 Dispatched On:

View and Edit Options: Review and Approval: Other Document Actions:

View Document Recreate Document
 Edit Document Deactivate Document

You can Add Attachments after you Reset to Dispatch, and then Execute the Contract again

Once the Contract is Executed, set the system to Approved

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Customize Page](#)

Attachments and Related Documents

SetID: STATE Contract ID: 42700-023-EQ-47400-101
 Vendor ID: 0000043861 PEST USA

[Upload a Document Attachment File](#)

Files	Description	
Allow for Email	File Name	Title View Delete
<input type="checkbox"/>		View

Related Documents	Details	
Allow for Email	*Source Transaction	*SetID Ad Hoc ID Internal Document Status
<input type="checkbox"/>	Ad Hoc	STATE

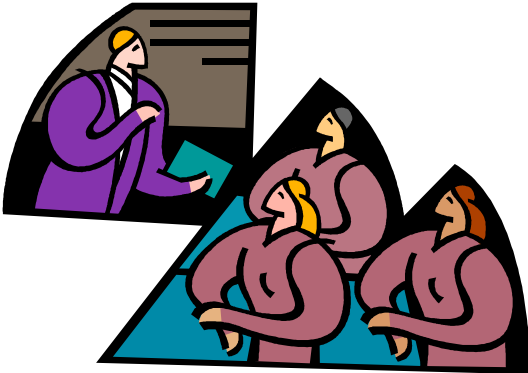
OK Cancel

ing Division. All rights reserved.



Demo 1:2 Import an Existing Contract

Importing an established executed contract



- Login as PSMITHXX and enter the password
- Import an existing State Entity (Agency) Contract using the Add New functionality
- Enter the CONTRACT ID using the proper naming convention (42700-023-Existing Contract ID) for a current Trash Removal contract
- Enter the Vendor ID, Description, Expire Date, and Fiscal Year, enter the line information, Payment Term Net 30, enter the Maximum Amount of \$8400.00 and save the contract

Scenario: Contract Administrator PSMITHXX wants to import an established (in effect) contract for Trash Removal that was awarded through eQuote to The Trashman and began on July 1, 2008, expired on June 30, 2009 and was renewed for the term July 1, 2009 through June 30, 2010 (1st renewal) and again on July 1, 2010 through June 30, 2011 (2nd renewal).



Lesson 1: Import an Existing Contract

Header Differences

Enter the Original Begin Date, uncheck Initial Period, click Renewals

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign o...

Contract ID: 42700-023-EQ-47400-105

Administrator: PSMITH Pamela G Smith 404-651-9175 [Add a Document](#)

▼ Header

Process Option: General Contract [Add Comments](#) [Activity Log](#)

Vendor: TRASHMANRE-01 [Vendor Search](#) [Contract Activities](#) [Document Status](#)

*Vendor ID: 0000041325 THE TRASHMAN [Primary Contact Info](#) [Thresholds & Notifications](#)

RECYCLING & DISPOSAL [Contract Agreement](#)

Begin Date: 07/07/2008 [ST](#)

Expire Date: 06/30/2011 [ST](#)

Currency: USD [CRRNT](#)

Primary Contact:

Vendor Contract Ref:

Description: Trash Removal

Master Contract ID:

Tax Exempt STATE OF GA Fiscal Year: 2011

▼ Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date

Corporate Contract Adjust Vendor Pricing First Price Can Be Changed on Order

Lock Chartfields Initial Period [Renewals](#)

Begin Date is the date the Contract was first Executed (the initial begin date) and the Expire Date is the date for this renewal period expiration

Uncheck Initial Period and click the Renewals link



Lesson 1: Import an Existing Contract

Renewal Status

Enter the Original Begin Date, uncheck Initial Period, click Renewals

Contract Entry

Contract Renewals

SetID: STATE Contract Id: 42700-023-EQ-47400-105

Renewal Status: Renewal #: of:

Renewal from: To:

Use the Renewal Status drop-down and select Renewal

Then indicate which renewal this is (here it is 2nd of 4)

Enter the begin date and expire date of THIS renewal

Click OK and Save



Lesson 1: Import an Existing Contract

Add the Document(s)

Click the Add a Document button

The screenshot shows a web application interface for contract management. The title bar reads "TGMP TRAINING FN90TRN - TEST". The main content area is titled "Contract" and includes tabs for "Create Release" and "Review Releases". The contract details are as follows:

- SetID: STATE
- *Status: Open
- Contract ID: 42700-023-EQ-47400-105
- Administrator: PSMITH (Pamela G Smith 404-651-9175)
- Process Option: General Contract
- Vendor: TRASHMANRE-01 (THE TRASHMAN RECYCLING & DISPOSAL)
- *Vendor ID: 0000041325
- *Begin Date: 07/07/2008
- Expire Date: 06/30/2011
- Currency: USD
- Primary Contact: [Empty]
- Vendor Contract Ref: [Empty]
- Description: Trash Removal
- Master Contract ID: [Empty]
- ☑ Tax Exempt: STATE OF GA
- Fiscal Year: 2011

On the right side of the contract details, there is an "Amount Summary" table:

Amount Summary	
Maximum Amount:	8,400.00 USD
Line Released:	0.00
Open Item Relsd:	0.00
Total Released Amount:	0.00

A yellow button labeled "Add a Document" is highlighted with a red rectangular box.

The Header is completed and the Lines are added at the bottom of the screen and the Header and Lines are saved

Then the Add a Document button is clicked



Lesson 1: Import an Existing Contract

Add a Document

Select Document Type and then Import Document

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Ac

[New Window](#)

Create Document

Source: Purchasing Contracts [Return to Document Search](#)

SetID: STATE Contract ID: 42700-023-EQ-47400-105

Vendor ID: 0000041325 THE TRASHMAN RECYCLING & DISPOSAL

*Document Type: **SPD Agency Services Contract** (dropdown)

Configurator ID: SPD_AGENCY_CNTRCT_SRV [SPD - AGENCY STANDARD CONTRACT](#)

*Description: Trash Removal

*Administrator: PSMITH01 [PETER SMITH01](#)

Sponsor:

Department:

Use Wizard Responses from Document: (<Select Document>)

[Create Document](#) **[Import Document](#)** [External Contacts List](#)

[Save](#) [Document View Access](#)

Select the appropriate Document Type from the drop-down list

Then click Import Document



Lesson 1: Import an Existing Contract Document is Uploaded using Original and Amendment Method

You can upload the contract using Original and Amendment

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites

Department:

*Description:

Import Option

- Current Contract/Document
(Current Contract/Document with no formal amendments or history to load.)
- Amended Contract
(Single current contract as fully amended requiring an amendment number. History is optional.)
- Amended Contract and Amendment
(Current contract as fully amended and a current separate amendment summary file. History is optional.)
- Original and Amendment
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

Current Version Customize | Find | First | 1-2 of 2 | Last

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Original Contract	Service_Contract_Small_Value.doc	1.00		Executed	07/01/2008	10:06AM	Upload	Clear
Amendment File	Trash.doc	1.00	1	Executed	07/07/2010	10:07AM	Upload	Clear

To specify Prior Versions enter an Amendment number greater than 0 in the Current Version grid.

Upload the original contract and also upload the Amendment File

This works when there is one Amendment File

Other documents are attached/ uploaded as before



Lesson 1: Import an Existing Contract Document is Uploaded as Current Contract Document Option

Then attach all renewals and amendments

Vendor ID: 0000041325 THE TRASHMAN RECYCLING & DISPOSAL
 Document Type: SPD Agency Services Contract
 Description: Trash Removal
 Administrator: PETER SMITH01
 Sponsor: Department:

[Document Attributes](#)

Version: 1.00 Created On: 07/07/10 9:58 AM [Add Attachments/Related Documents](#)
 Status: Dispatched Last Modified On: 07/07/10 10:00 AM [External Contacts List](#)
[Document View Access](#)

[Execute Contract](#)

View and Edit Options: [View Document](#) [Edit Document](#)
 Review and Approval: [Recreate Document](#) [Deactivate Document](#)

Attach all of the renewal agreements and any related amendments not uploaded

SetID: STATE Contract ID: 42700-023-EQ-47400-105
 Vendor ID: 0000041325 THE TRASHMAN RECYCLING & DISPOSAL

[Upload a Document Attachment File](#)

Files	Description	FEED
Allow for Email	File Name	Title
<input type="checkbox"/>		

Related Documents	Details	FEED
Allow for Email	*Source Transaction	*SetID Ad Hoc ID
<input type="checkbox"/>	Ad Hoc STATE	

OK Cancel

g Division. All rights reserved.



Lesson Two: Amending and Modifying Contracts



Lesson 2: Amending and Modifying Contracts

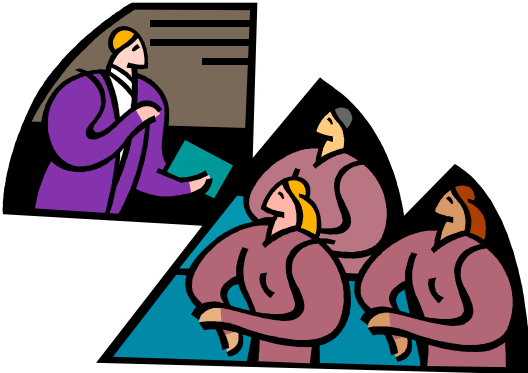
When an Amendment is Needed

Amendment Needed	Amendment Not Needed
Amend or Edit an Executed Contract	
Renew an Executed Contract	
Extend an Executed Contract	
	Close an Expired Contract
	Cancel a Contract for Cause
	Cancel a Contract for Convenience



Demo 2.1 Create an Amendment

Create an Amendment for the Pest Control Contract



- Search for the *Executed Pest Control* contract
- Click **Maintain Document** button on the Contract Header page and change the status to Open
- Ensure that the **Contract Status** is *Executed*
- Click the Create Amendment button
- Select the appropriate amendment file type and configurator
- Determine if this is a Major or Minor Version
- Submit it for approval, execute the contract and set the system status back to Approved

Scenario: Contract Administrator PSMITHXX needs to amend the newly created Pest Control contract to include pest control treatment at one additional new building



Lesson 2: Amending and Modifying Contracts

Executed Contract – Creating an Amendment

Return to your Executed Contract

Contract Entry
Enter any information you have and click Search. Leave fields blank for a list of all values.

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

SetID: [=] STATE

Contract ID: [begins with] 2700-023-EQ-47400-100

Contract Process Option: [=]

Short Vendor Name: [begins with]

Master Contract ID: [begins with]

Correct History

Search | Clear | [Basic Search](#) | [Save Search Criteria](#)

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

Return to your Existing Contract



Lesson 2: Amending and Modifying Contracts

Executed Contract – Creating an Amendment

Change the System Status to Open and go to Maintain Document

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign Out

[New Window](#) | [Customize Page](#) | [http](#)

Contract **Create Release** Review Releases

SetID: STATE *Status: **Open**

Contract ID: 42700-023-EQ-47400-100

Administrator: PSMITH01 PETER SMITH01

▼ Authored Document

Authored Status: Executed Version: 1.00 Amendment: 0 **Maintain Document**

▼ Header

Process Option: General Contract [Add Comments](#) [Activity Log](#)

Vendor: ACTIVEPEST-001 [Vendor Search](#) [Contract Activities](#) [Document Status](#)

*Vendor ID: 0000438587 [ACTIVE PEST CONTROL OF MIDDLE GA INC](#) [Primary Contact Info](#) [Thresholds & Notifications](#)

*Begin Date: 07/01/2010 [Contract Agreement](#)

Expire Date: 06/30/2011 [Amount Summary](#)

Currency: USD CRRNT

Primary Contact:

Vendor Contract Ref:

Description: Pest Control

Maximum Amount:	9,600.00	USD
Line Released:	0.00	
Open Item Relsd:	0.00	
Total Released Amount:	0.00	



Lesson 2: Amending and Modifying Contracts

Executed Contract – Creating an Amendment

Click to Create Amendment

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

Document Management [Return to Document Search](#)

SetID: STATE Contract ID: [42700-023-EQ-47400-100](#)

Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC

Document Type: SPD Agency Services Contract

Description: Pest Control

Administrator: PETER SMITH01

Sponsor: Department:

[Document Attributes](#)

Version: 1.00 Created On: 07/06/10 10:42AM [Add Attachments/Related Documents](#)

Status: Executed Last Modified On: 07/06/10 11:27AM [External Contacts List](#)

[Reset to Dispatch](#) [Document View Access](#)

Create Amendment

[Imported Document](#)

Collaborated On:

Approved On: 07/06/10 11:14:19AM

Dispatched On: 07/06/10 11:24:50AM

Executed On: 07/06/10 11:27:16AM

Review and Approval:



Lesson 2: Amending and Modifying Contracts

Amendment Types

There are three types of Amendments in Team Georgia Marketplace™:

- *Amend Contract Only:* Revision to the original contract
- *Amend Contract with Amendments:* Generates both a separate amendment file and a copy of the last executed main contract document
- ***Amendment File Only:* Generates only the amended file (recommended)**



Lesson 2: Amending and Modifying Contracts

Amendment Option and Configurator ID

Select Amendment Option, Configurator ID, determine Major or Minor and enter comment explaining what the amendment is for

IGMP TRAINING FN90TRN - TEST

Home Worklist

[New Window](#)

Create an Amended Version

Select amendment option, desired version and comment as to why the amendment is necessary and press OK. Document(s) will then be generated based on amendment option.

Amendment Option:

Amendment Configurator ID:

Version:

Minor Version (1.01)

Major Version (2.00)

*Comments:

First select the Amendment Option, then the Amendment Configurator ID using the drop-down menu.

Next indicate if this is a Major or Minor version change. Almost always an Amendment is a Major version change. Then enter a comment to explain the amendment



Lesson 2: Amending and Modifying Contracts

Creating an Amendment Option 1—Edit the Document

Edit the Amendment Document

The screenshot shows a web application interface for 'TGMP TRAINING FN90TRN - TEST'. At the top, there is a navigation bar with links for Home, Worklist, Add to Favorites, and Sign out. The main content area displays document information:

- Document Type:** SPD Agency Services Contract
- Description:** Pest Control
- Administrator:** PETER SMITH01
- Sponsor:** [blank] **Department:** [blank]

Below this information are several links: [Document Attributes](#), [Add Attachments/Related Documents](#), [External Contacts List](#), and [Document View Access](#). A yellow button labeled 'Send to Contacts' is also present.

The document details include:

- Amendment:** 1 **Created On:** 07/06/10 10:42AM
- Version:** 2.00 **Last Modified On:** 07/06/10 3:29PM
- Status:** Draft

A section titled 'Includes Imported Document' is also visible.

At the bottom, there are three columns of action buttons:

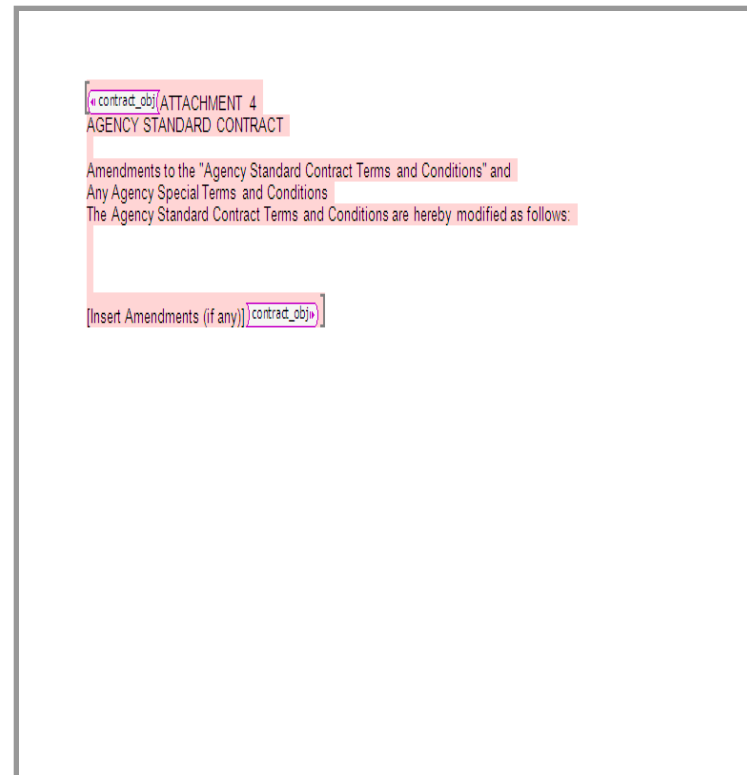
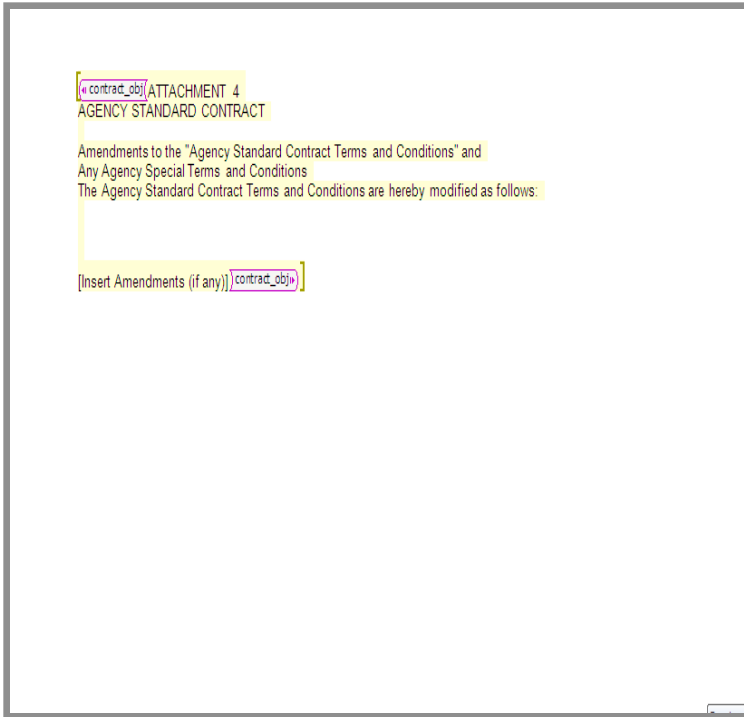
- View and Edit Options:**
 - View Original Document
 - View Document
 - Edit Document** (highlighted with a red box)
- Review and Approval:**
 - Route for Collaboration
 - Preview Approval
 - Submit for Approval
- Other Document Actions:**
 - Refresh Document
 - Recreate Document
 - Import Prior Document
 - Deactivate Document

Additional links at the bottom include [Collaboration Details](#), [Approval Details](#), and [Document Modification Summary](#).



Lesson 2: Amending and Modifying Contracts

Creating an Amendment Option 1—Edit the Document



You first need to Unprotect the document, insert your edit, reprotect the document, save the reprotected document, check it in, and upload it into the contract. Note that it is easier to do this if the verbiage has been created previously




Lesson 2: Amending and Modifying Contracts

Option 2—Upload the Amendment as an Attachment

Consider the Amendment Document as an Attachment

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out



Document Type: SPD Agency Services Contract
 Description: Pest Control
 Administrator: PETER SMITH01
 Sponsor: Department:

[Document Attributes](#)

Amendment: 1 Created On: 07/06/10 10:42AM **Add Attachments/Related Documents**
 Version: 2.00 Last Modified On: 07/06/10 3:29PM [External Contacts List](#)
 Status: Draft [Document View Access](#)

[Send to Contacts](#)

Includes Imported Document

View and Edit Options:
[View Original Document](#)
[View Document](#)
[Edit Document](#)
[Document Version History](#)

Review and Approval:
[Route for Collaboration](#)
[Preview Approval](#)
[Submit for Approval](#)
[Collaboration Details](#)
[Approval Details](#)
[Document Modification Summary](#)

Other Document Actions:
[Refresh Document](#)
[Recreate Document](#)
[Import Prior Document](#)
[Deactivate Document](#)



Lesson 2: Amending and Modifying Contracts

Option 2—Upload the Amendment as an Attachment

IGMP TRAINING FN90 TRN - TEST

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Customize Page](#) |

Attachments and Related Documents

SetID: STATE Contract ID: 42700-023-EQ-47400-100
 Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC

[Upload another Document Attachment File](#)

Attachments			
Files	Description		
<input checked="" type="checkbox"/>	Amendment.doc	Amendment to include services to building F-2	View Delete

Related Documents				
Related Documents	Details			
<input type="checkbox"/>	Ad Hoc	STATE		

OK **Cancel**



Lesson 2: Amending and Modifying Contracts

Amending-Collaborate if Needed and then Submit for Approval

Follow the procedures established by your State Entity

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign Out

Document Type: SPD Agency Services Contract
 Description: Pest Control
 Administrator: PETER SMITH01
 Sponsor: Department:

[Document Attributes](#)

Amendment: 1 Created On: 07/06/10 10:42AM [Modify Attachments/Related Documents](#)
 Version: 2.00 Last Modified On: 07/06/10 3:41PM [External Contacts List](#)
 Status: Draft [Document View Access](#)

Includes Imported Document

View and Edit Options:

Review and Approval:

Other Document Actions:

[Document Version History](#)
[Collaboration Details](#)
[Approval Details](#)
[Document Modification Summary](#)



Lesson 2: Amending and Modifying Contracts

Amending-Dispatch to Supplier

Dispatch to the Supplier for Signature,if needed,or to provide a copy

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

Description: Pest Control
 Administrator: PETER SMITH01
 Sponsor: Department: [Document Attributes](#)

Amendment: 1 Created On: 07/06/10 10:42AM [Modify Attachments/Related Documents](#)
 Version: 2.00 Last Modified On: 07/06/10 3:45PM [External Contacts List](#)
 Status: Approved [Document View Access](#)
Dispatch to Contacts Collaborated On:
[Includes Imported Document](#) Approved On: 07/06/10 3:45:46PM

View and Edit Options:
[View Original Document](#)
[View Document](#)
[Edit Document](#)
[Document Version History](#)

Review and Approval:
[Approval Details](#)
[Document Modification Summary](#)
[Generation Log](#)

Other Document Actions:
[Refresh Document](#)
[Recreate Document](#)
[Import Prior Document](#)
[Deactivate Document](#)



Lesson 2: Amending and Modifying Contracts

Amending-Dispatch to Supplier

Select Dispatch Method and File(s) to be Sent

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites

Version: 2.00
 Amendment: 1
 Administrator: PETER SMITH01
 Administrator Email: fscmstst@sao.ga.gov
 *Delivery Method:
 Send Copy to Administrator
 Set to Checked Out

Files To Be Sent

Original Executed Document

Amendment Files

Most Recent Only

All

Attachments

Related Documents

Description:
 This email contains documents for contract: STATE, 42700-023-EQ-47400-100.

Selected	Contact ID	Name	Title	Email ID	Description
<input checked="" type="checkbox"/>		Fred Smith	Owner	fred@yahoo.com	

[Select All Contacts](#) [Clear All Contacts](#)

Selected	Origin	Comment Type	File Name	Title	View
<input type="checkbox"/>	Doc Management		Amendment.doc	Amendment to include services to building F-2	View

You can send only the Amendment File or you can send the contract and the Amendment File.

If you have used Option 2— attaching the Amendment File you would send the Attachment

Copy



Lesson 2: Amending and Modifying Contracts

Amending-Execute the Contract Again

Attach the signed Signature Page if applicable, then Execute the Contract again

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign

SetID: STATE Contract ID: [42700-023-EQ-47400-100](#)

Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC

Document Type: SPD Agency Services Contract

Description: Pest Control

Administrator: PETER SMITH01

Sponsor: Department:

[Document Attributes](#)

Amendment: 1 Created On: 07/06/10 10:42AM [Modify Attachments/Related Documents](#)

Version: 2.00 Last Modified On: 07/06/10 3:55PM [External Contacts List](#)

Status: Dispatched [Document View Access](#)

[Send to Contacts](#)

[Execute Contract](#)

Collaborated On:

Approved On: 07/06/10 3:45:46PM

Dispatched On: 07/06/10 3:55:37PM

Includes Imported Document

View and Edit Options: [View Original Document](#) [View Document](#)

Review and Approval: [Approval Details](#) [Document Modification Summary](#) [Generation Log](#)

Other Document Actions: [Refresh Document](#) [Recreate Document](#)



Lesson 2: Amending and Modifying Contracts

Amending-Set the System Status to Approved

Return to the Header Page, set the system to Approved, and Save

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

New Window | Customize Page |

Menu

Search:

- My Favorites
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
 - Create Contracts and Documents
 - Contract Entry
 - Document Management
 - My Collaborators/View Access
 - Monitor and Update Agreements
 - Manage Contract Library
 - Search Content
- eProcurement
- Services Procurement
- Commitment Control
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools
- Change My Password
- My Personalizations
- My System

Contract | **Create Release** | Review Releases

*Status: **Approved**

SetID: STATE

Contract ID: 42700-023-EQ-47400-100

Administrator: PSMITH01 PETER SMITH01

Authored Document

Authored Status: Executed Version: 2.00 Amendment: 1 **Maintain Document**

Header

Process Option: General Contract [Add Comments](#) [Activity Log](#)

Vendor: ACTIVEPEST-001 [Contract Activities](#) [Document Status](#)

Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC [Primary Contact Info](#) [Thresholds & Notifications](#)

Begin Date: 07/01/2010 [Contract Agreement](#)

Expire Date: 06/30/2011 [Amount Summary](#)

Currency: USD CRRNT

Primary Contact:

Vendor Contract Ref:

Maximum Amount: 9,600.00 USD

Line Released: 0.00

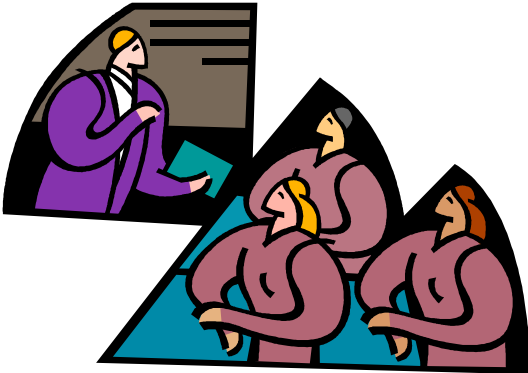
Open Item Relsd: 0.00

Total Released Amount: 0.00



Demo 2.2 Renew a Contract

Renew the Pest Control Contract



- Locate the *Executed Pest Control* contract
- Change the system status to Open.
- Change the Expire date to reflect the new year
- Change the Renewal status to indicate which renewal this is and the begin and expire date of this renewal
- Click the Create Amendment button and create the Renewal Amendment
- Attach the Contract Assessment document, NOAA and any other relevant documents
- Select the appropriate amendment file type and configurator
- Determine this is a Major Version change and add comments
- Submit it for approval and complete the contract to Executed. Set the system status back to Approved

Scenario: It is May, 2011 and Contract Administrator PSMITHXX needs to renew the Pest Control contract he created for another year.



Lesson 2: Amending and Modifying Contracts

Renewing a Contract

Contract [Create Release](#) [Review Releases](#)

SetID: STATE *Status: **Open**

Contract ID: 42700-023-EQ-47400-100

Administrator: PSMITH01 PETER SMITH01

Authorized Document

Authorized Status: Executed Version: 2.00 Amendment: 1 [Maintain Document](#)

Header

Process Option: General Contract [Add Comments](#) [Activity Log](#)

Vendor: ACTIVEPEST-001 [Contract Activities](#) [Document Status](#)

*Vendor ID: 0000438587 ACTIVE PEST CONTROL [Primary Contact Info](#) [Thresholds & Notifications](#)

OF MIDDLE GA INC [Contract Agreement](#)

*Begin Date: 07/01/2010

Expire Date: 06/30/2012

Currency: USD CRRNT

Primary Contact:

Amount Summary

Maximum Amount: 9,600.00 USD

Line Released: 0.00

Open Item Relsd: 0.00

Set the System Status from Approved back to Open

Change the Expire Date to the date this renewal period is to end

Uncheck Initial Period and click the blue link for Renewals

Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date

Corporate Contract Adjust Vendor Pricing First Price Can Be Changed on Order Initial Period [Renewals](#)

Lock Chartfields Non-Profit

[PO Defaults](#) [PO Open Item Pricing](#)

Voucher Contract Options

Invoice Number: Gross Amount: 0.00 USD

AP Business Unit: Freight Amount: 0.00

Accounting Template: Sales Tax Amount: 0.00

*Payment Terms ID: N30 VAT Amount: 0.00

Basis Dt Type: Misc Charge Amount: 0.00

[Miscellaneous Charges](#) [Retention](#)



Lesson 2: Amending and Modifying Contracts

Renewing a Contract

Select Renewal from the drop-down and indicate which renewal this is and the begin and expire dates

Contract Entry

Contract Renewals

SetID: STATE Contract Id: 42700-023-EQ-47400-100

Renewal Status: Renewal #: of:

Renewal from: To:

The Renewal drop-down will give you the option of selecting:
Renewal
Extended
Cancelled



Lesson 2: Amending and Modifying Contracts

Create the Renewal Amendment

The information on the Header has been entered, you now create the Amendment on the Contract

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

SetID: STATE *Status:

Contract ID: 42700-023-EQ-47400-100

Administrator: PETER SMITH01

▼ Authored Document

Authored Status: Executed Version: 2.00 Amendment: 1

▼ Header

Process Option: General Contract [Activity Log](#)

Vendor: [Vendor Search](#) [Contract Activities](#)

*Vendor ID: ACTIVE PEST CONTROL OF MIDDLE GA INC [Primary Contact Info](#) [Document Status](#)

*Begin Date: [Contract Agreement](#) [Thresholds & Notifications](#)

Expire Date:

Currency:

Primary Contact:

Vendor Contract Ref:

Description:

Master Contract ID:

Tax Exempt STATE OF GA Fiscal Year:

Amount Summary	
Maximum Amount:	<input type="text" value="9,600.00"/> USD
Line Released:	0.00
Open Item Relsd:	0.00
Total Released Amount:	0.00
Remaining Amount:	9,600.00
Remaining Percent:	100.00

You may click Add Comments to enter any comments related to this action. This is optional when an Amendment is created



Lesson 2: Amending and Modifying Contracts

Create the Renewal Amendment

You Create the Amendment as before

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

SetID: STATE Contract ID: [42700-023-EQ-47400-100](#)

Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC

Document Type: SPD Agency Services Contract

Description: Pest Control

Administrator: PETER SMITH01

Sponsor: Department:

[Document Attributes](#)

Amendment: 1 Created On: 07/06/10 10:42AM [Modify Attachments/Related Documents](#)

Version: 2.00 Last Modified On: 07/06/10 3:58PM [External Contacts List](#)

Status: Executed [Document View Access](#)

[Reset to Dispatch](#)

[Create Amendment](#)

[Includes Imported Document](#)

Collaborated On:

Approved On: 07/06/10 3:45:46PM

Dispatched On: 07/06/10 3:55:37PM

Executed On: 07/06/10 3:58:12PM

View and Edit Options: [View Original Document](#)

Review and Approval: [Approval Details](#)
[Document Modification Summary](#)

Other Document Actions: [Import Prior Document](#)



Lesson 2: Amending and Modifying Contracts

Create the Renewal Amendment

Select Major Version and the Configurator and Enter Comments

Create an Amended Version

Select amendment option, desired version and comment as to why the amendment is necessary and press OK. Document(s) will then be generated based on amendment option.

Amendment Option: Amendment Files Only

Amendment Configurator ID:

Version:

Minor Version (2.01)

Major Version (3.00)

*Comments:

Select appropriate Amendment document from the Amendment Configurator ID and enter the comment explaining the renewal



Lesson 2: Amending and Modifying Contracts

Create the Renewal Amendment

Edit the Amendment Document, if applicable, and Add Attachments

TGMP TRAINING FN90TRN - TEST

Home Worklist Add to Favorites Sign

Description: Test Contract
 Administrator: PETER SMITH01
 Sponsor: Department:

[Document Attributes](#)

Amendment: 2 Created On: 07/06/10 10:42AM [Modify Attachments/Related Documents](#)
 Version: 3.00 Last Modified On: 07/07/10 1:50PM [External Contacts List](#)
 Status: Draft [Document View Access](#)

[Send to Contacts](#)

Includes Imported Document

View and Edit Options: Review and Approval: Other Document Actions:

[View Original Document](#) [Route for Collaboration](#) [Refresh Document](#)
[View Document](#) [Preview Approval](#) [Recreate Document](#)
[Edit Document](#) [Submit for Approval](#) [Import Prior Document](#)
[Document Version History](#) [Collaboration Details](#) [Deactivate Document](#)
[Approval Details](#)
[Document Modification Summary](#)
[Generation Log](#)

- Add the following attachments:
- Contract Assessment form
 - NOAA
 - Any Renewal letters or agreements



Lesson 2: Amending and Modifying Contracts

Attach all documents

Attach the accompanying documents

IGMP TRAINING FN90 TRN - TEST

Home | Worklist | Add to Favorites

SetID: STATE Contract ID: 42700-023-EQ-47400-100
 Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC

[Upload another Document Attachment File](#)

Attachments Customize | Find | First 1-4 of 4 Last

Files	Description		
Allow for Email	File Name	Title	View Delete
<input checked="" type="checkbox"/>	Amendment.doc	Amendment to include services to building F-2	View -
<input checked="" type="checkbox"/>	NOAA.doc	NOAA for renewal 7/1/2011-6/30/2011	View -
<input checked="" type="checkbox"/>	Contract_Assessment_Form.doc	Contract Assessment 5/25/2010	View -
<input checked="" type="checkbox"/>	Signed_renewal.doc	Signed Renewal 5/31/2010	View -

Related Documents Customize | Find | View All | First 1 of 1 Last

Related Documents	Details				
Allow for Email	*Source Transaction	*SetID	Ad Hoc ID	Internal	Document Status
<input type="checkbox"/>	Ad Hoc	STATE			

OK Cancel

Internet

The first Amendment document was previously attached.

Allow for Email should always be checked



Lesson 2: Amending and Modifying Contracts

Submit for Approval and complete through Execute

Collaborate if needed and submit for Approval then Dispatch to Supplier

The screenshot shows a web interface for document management. At the top, it says "IGMP TRAINING FN90 TRN - TEST". Below this, there are navigation links: Home, Worklist, Add to Favorites, and Sign. The main content area displays document information: Administrator: PETER SMITH01, Sponsor: [blank], Department: [blank]. There are links for Document Attributes, Modify Attachments/Related Documents, External Contacts List, and Document View Access. Document details include Amendment: 2, Version: 3.00, Status: Draft, Created On: 07/06/10 10:42AM, and Last Modified On: 07/07/10 2:04PM. A "Send to Contacts" button is present. Below this, there are three columns of actions: "View and Edit Options" (View Original Document, View Document, Edit Document), "Review and Approval" (Route for Collaboration, Preview Approval, Submit for Approval), and "Other Document Actions" (Refresh Document, Recreate Document, Import Prior Document, Deactivate Document). The "Submit for Approval" button is highlighted with a red box. At the bottom, there are links for Document Version History, Collaboration Details, Approval Details, Document Modification Summary, and Generation Log.

Submit for Approval

Dispatch to Supplier for signature or to provide a copy.

Attach signature page is applicable



Lesson 2: Amending and Modifying Contracts

Execute the Renewed Contract

Execute the Contract and Set the System Status to Approved

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites

Document management

Contract ID: **42700-023-EQ-47400-100** [Return to Document Search](#)

SetID: STATE Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC

Document Type: SPD Agency Services Contract

Description: Pest Control

Administrator: PETER SMITH01

Sponsor: Department:

[Document Attributes](#)

Amendment: 2 Created On: 07/06/10 10:42AM [Modify Attachments/Related Documents](#)

Version: 3.00 Last Modified On: 07/07/10 2:07PM [External Contacts List](#)

Status: Dispatched [Document View Access](#)

[Execute Contract](#)

[Includes Imported Document](#)

View and Edit Options: [View Original Document](#)

Review and Approval: [Approval Details](#)

Other Document Actions: [Refresh Document](#)

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites

[New Window](#) | [Cust](#)

Contract [Create Release](#) [Review Releases](#)

Contract ID: 42700-023-EQ-47400-100 *Status: **Approved**

Administrator: PSMITH01 PETER SMITH01

Authoried Document

Authoried Status: Executed Version: 3.00 Amendment: 2 [Maintain Document](#)

Header

Process Option: General Contract [Add Comments](#) [Activity Log](#)

Vendor: ACTIVEPEST-001 [Contract Activities](#) [Document Status](#)

Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC [Primary Contact Info](#) [Thresholds & Notifications](#)

[Contract Agreement](#)

[Amount Summary](#)

Begin Date: 07/01/2010

Expire Date: 06/30/2012 Maximum Amount: 9,600.00 USD

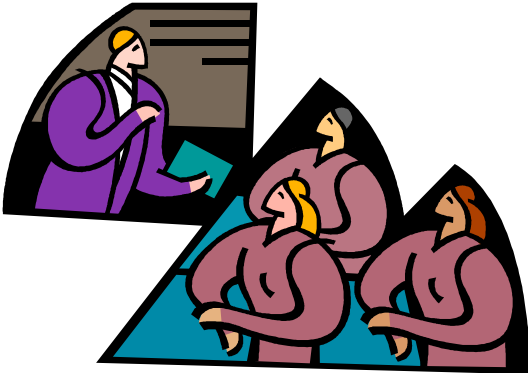
Currency: USD CRRNT Line Released: 0.00

Primary Contact: Open Item Released: 0.00



Demo 2.3 Extend a Contract

Extend the Trash Removal Contract



- Locate the *Executed Trash Removal* contract
- Change the system status to Open.
- Change the Expire date to reflect the 90 day extension
- Change the Renewal status and select Extended from the drop-down menu. Indicate the period of time of the extension (90 days)
- Click the Create Amendment button and create the Extension Amendment
- Attach an updated Contract Assessment document, NOAA and any other relevant documents
- Select the appropriate amendment file type and configurator
- Determine this is a Major Version change and add comments
- Submit it for approval and complete the contract to Executed. Set the system status back to Approved

Scenario: It is May, 2011 and Contract Administrator PSMITHXX needs to Extend the Trash Removal contract he created for 90 days because a new Statewide Contract for Trash Removal has been established and is scheduled to begin on September 1, 2011. PSMITHXX has informed the Supplier and he has agreed to extend the contract for 90 days.



Lesson 2: Amending and Modifying Contracts

Extending a Contract

Return the System to Open Status, enter the new Expire Date, and check the Renewal link

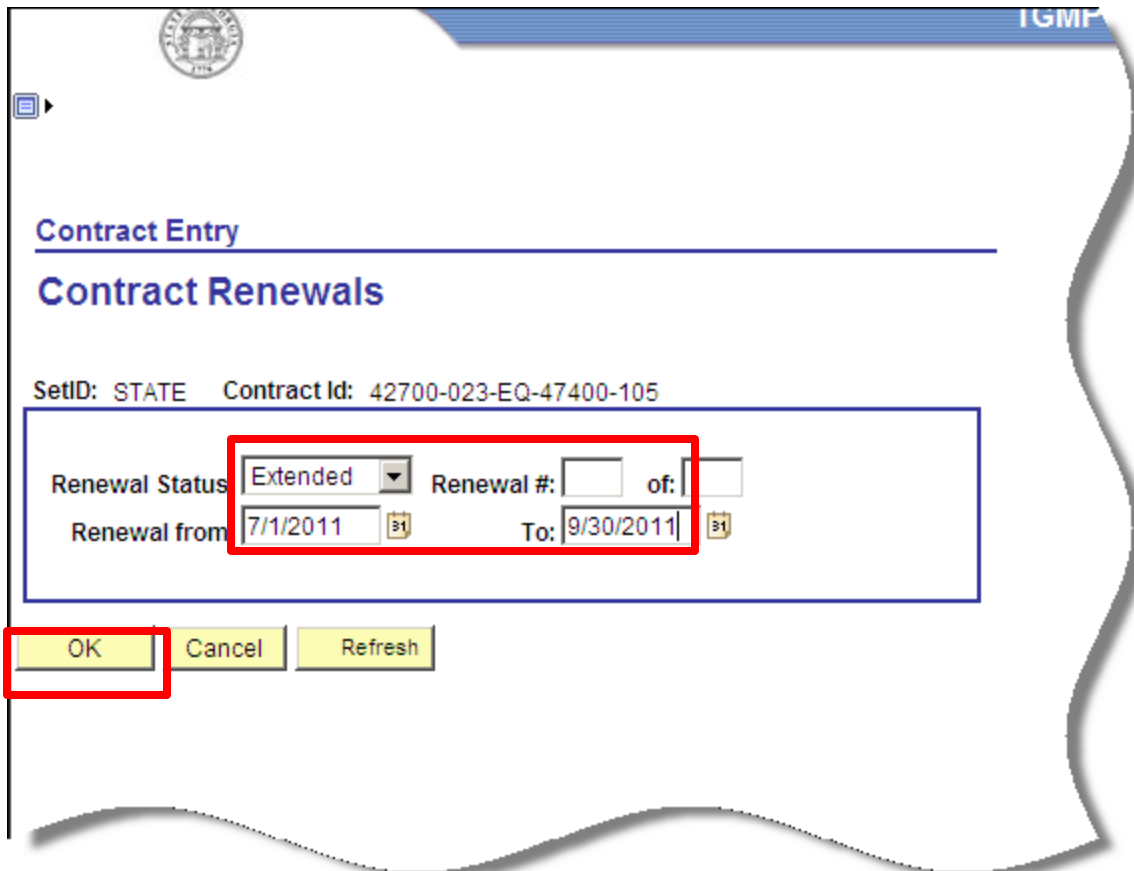
The screenshot displays a contract management interface with the following details:

- Contract Header:**
 - Contract ID: 42700-023-EQ-47400-105
 - Administrator: PSMITH
 - Author: Pamela G Smith 404-651-9175
 - Authorized Status: Executed
 - Version: 1.00, Amendment: 0
 - Buttons: [Maintain Document](#)
- Vendor Information:**
 - Vendor: TRASHMANRE-01
 - *Vendor ID: 0000041325
 - Company: THE TRASHMAN RECYCLING & DISPOSAL
 - Buttons: [Vendor Search](#), [Contract Activities](#), [Primary Contact Info](#), [Contract Agreement](#), [Activity Log](#), [Document Status](#), [Thresholds & Notifications](#)
- Contract Dates:**
 - Original Date: 07/07/2008
 - Expire Date: 09/30/2011
 - Currency: USD
- Amount Summary:**
 - Maximum Amount: 8,400.00 USD
 - Line Released: 0.00
 - Open Item Relsd: 0.00
 - Total Released Amount: 0.00
- Contract Options:**
 - Allow Open Item Reference:
 - Adjust Vendor Pricing First:
 - Price Can Be Changed on Order:
 - Must Use Contract Rate Date:
 - Initial Period: [Renewals](#)
- Supplier Contract Options:**
 - Contract Number: []
 - Business Unit: []
 - Bidding Template: []
 - Payment Terms ID: N30
 - Contract Type: []
 - Gross Amount: 0.00 USD
 - Freight Amount: 0.00
 - Sales Tax Amount: 0.00
 - VAT Amount: 0.00
 - Misc Charge Amount: 0.00
 - Buttons: [Miscellaneous Charges](#), [Retention](#)

Lesson 2: Amending and Modifying Contracts

Extending a Contract

Select Renewal Status of Extended and enter Extend Dates



IGMP

Contract Entry

Contract Renewals

SetID: STATE Contract Id: 42700-023-EQ-47400-105

Renewal Status: Renewal #: of:

Renewal from: To:



Lesson 2: Amending and Modifying Contracts

Extending a Contract

Go to Maintain Document

IGMP TRAINING FN90 TRN - TEST

Home Worklist Add to

SetID: STATE *Status: **Open**

Contract ID: 42700-023-EQ-47400-105

Administrator: PSMITH Pamela G Smith 404-651-9175

▼ Authored Document

Authored Status: Executed Version: 1.00 Amendment: 0 **Maintain Document**

▼ Header

Process Option: General Contract [Add Comments](#) [Activity Log](#)

Vendor: TRASHMANRE-01 [Vendor Search](#) [Contract Activities](#) [Document Status](#)

*Vendor ID: 0000041325 THE TRASHMAN [Primary Contact Info](#) [Thresholds & Notifications](#)

RECYCLING & DISPOSAL [Contract Agreement](#)

*Begin Date: 07/07/2008

Expire Date: 09/30/2011

Currency: USD CRRNT

Primary Contact:

Vendor Contract Ref:

Description: Trash Removal

Master Contract ID:

Fiscal Year: 2011

Amount Summary	
Maximum Amount:	8,400.00 USD
Line Released:	0.00
Open Item Relsd:	0.00
Total Released Amount:	0.00
Remaining Amount:	8,400.00
	100.00



Lesson 2: Amending and Modifying Contracts

Create the Amendment to the Extended Contract

Create Amendment

Document Type: SPD Agency Services Contract
Description: Trash Removal
Administrator: PETER SMITH01
Sponsor: Department: [Document Attributes](#)

Version: 1.00 Created On: 07/07/10 9:58AM [Add Attachments/Related Documents](#)
Status: Executed Last Modified On: 07/07/10 10:03AM [External Contacts List](#)
[Reset to Dispatch](#) [Document View Access](#)
[Create Amendment](#)
Collaborated On:
Approved On:
Dispatched On:
Executed On: 07/07/10 10:03:16AM

Imported Document

View and Edit Options: Review and Approval: Other Document Actions:
[View Document](#) [Deactivate Document](#)
[Document Version History](#)



Lesson 2: Amending and Modifying Contracts

Create the Amendment to the Extended contract

Select Major Version and the Configurator and Enter Comments

Create an Amended Version

Select amendment option, desired version and comment as to why the amendment is necessary and press OK. Document(s) will then be generated based on amendment option.

Amendment Option:

Amendment Configurator ID:

Version:

Minor Version (1.01)

Major Version (2.00)

*Comments:

Select appropriate Amendment document or NOAA document from the Amendment Configurator ID, click Major Version and enter the comment explaining the extension



Lesson 2: Amending and Modifying Contracts

Edit the Amendment Document and/or Add Attachments

Edit the Amendment Document—if applicable

The screenshot shows a web application interface for document management. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign Out' links. The main content area displays document information for 'SPD Agency Services Contract' with a description of 'Trash Removal' and administrator 'PETER SMITH01'. It shows amendment details: Amendment 1, Version 2.00, Status Draft, Created On 07/07/10 9:58AM, and Last Modified On 07/07/10 2:33PM. A 'Send to Contacts' button is present. Below this, there are three columns of action buttons: 'View and Edit Options' (View Original Document, View Document, Edit Document), 'Review and Approval' (Route for Collaboration, Preview Approval, Submit for Approval), and 'Other Document Actions' (Refresh Document, Recreate Document, Import Prior Document, Deactivate Document). The 'Edit Document' button is highlighted with a red rectangle. At the bottom, there are links for 'Document Version History', 'Collaboration Details', 'Document Modification Summary', and 'Generation Log'.



Lesson 2: Amending and Modifying Contracts

Attach all relevant documents

Attach the Signed Amendment Document and other documents

Document Type: SPD Agency Services Contract
 Description: Trash Removal
 Administrator: PETER SMITH01
 Sponsor: Department:

[Document Attributes](#)

Amendment: 1 Created On: 07/07/10 9:58AM **Add Attachments/Related Documents**
 Version: 2.00 Last Modified On: 07/07/10 2:33PM [External Contacts List](#)
 Status: Draft [Document View Access](#)

[Send to Contacts](#)

Includes Imported Document

View and Edit Options:
[View Original Document](#)
[View Document](#)
[Edit Document](#)

Review and Approval:
[Route for Collaboration](#)
[Preview Approval](#)
[Submit for Approval](#)

Other Document Actions:
[Refresh Document](#)
[Recreate Document](#)
[Import Prior Document](#)
[Deactivate Document](#)

[Document Version History](#)
[Collaboration Details](#)
[Document Modification Summary](#)
[Generation Log](#)



Lesson 2: Amending and Modifying Contracts

Complete the Amendment process through Executing the Contract

Submit for Approval, Dispatch to the Supplier, Execute the Contract

The screenshot displays a web interface for a contract amendment. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign' links. The main content area shows contract details: Document Type (SPD Agency Services Contract), Description (Trash Removal), Administrator (PETER SMITH01), and Sponsor/Department fields. A 'Document Attributes' link is present. Below this, amendment details are shown: Amendment 1, Version 2.00, Status Draft, Created On (07/07/10 9:58AM), and Last Modified On (07/07/10 2:33PM). Links for 'Add Attachments/Related Documents', 'External Contacts List', and 'Document View Access' are provided. A 'Send to Contacts' button is highlighted in yellow. Under 'Includes Imported Document', there are three columns of action buttons: 'View and Edit Options' (View Original Document, View Document, Edit Document), 'Review and Approval' (Route for Collaboration, Preview Approval, Submit for Approval), and 'Other Document Actions' (Refresh Document, Recreate Document, Import Prior Document, Deactivate Document). The 'Submit for Approval' button is highlighted with a red rectangle. At the bottom, there are links for 'Document Version History', 'Collaboration Details', 'Document Modification Summary', and 'Generation Log'.



Lesson 2: Amending and Modifying Contracts

Extended Contract is now Executed and System is set to Approved

Contract Status is Executed and System is set back to Approved

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

New Window | Customize Page | http

Contract | **Create Release** | Review Releases

SetID: STATE *Status: **Approved**

Contract ID: 42700-023-EQ-47400-105

Administrator: PSMITH Pamela G Smith 404-651-9175

Authored Document

Authored Status: Executed Version: 2.00 Amendment: 1 **Maintain Document**

Header

Process Option: General Contract [Add Comments](#) [Activity Log](#)

Vendor: TRASHMANRE-001 [Contract Activities](#) [Document Status](#)

Vendor ID: 0000041325 THE TRASHMAN [Primary Contact Info](#) [Thresholds & Notifications](#)

RECYCLING & DISPOSAL [Contract Agreement](#)

Begin Date: 07/07/2008

Expire Date: 09/30/2011

Currency: USD CRRNT

Primary Contact:

Vendor Contract Ref:

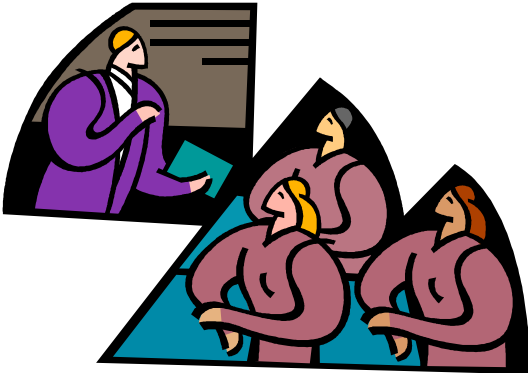
Trash Removal

Amount Summary	
Maximum Amount:	8,400.00 USD
Line Released:	0.00
Open Item Relsd:	0.00
Approved Amount:	0.00



Demo 2.4 Closing a Contract

Close the Trash Removal Contract



- Locate the *Executed Trash Removal* contract
- Enter a comment stating that the contract is being closed because the term has expired and the contract is being replaced by a new Statewide Contract
- Change the System status to Closed

Scenario: It is October 1, 2011 and Contract Administrator PSMITHXX needs to Close the Trash Removal contract because it has been replaced by a new SWC.



Lesson 2: Amending and Modifying Contracts

Closing a Contract

Enter a Comment explaining your action

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign c

Menu

Search:

- My Favorites
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
- ▼ Create Contracts and Documents
 - Contract Entry
 - Document Management
 - My Collaborators/View Access
- Monitor and Update Agreements
- Manage Contract Library
- Search Content
- eProcurement
- Services Procurement
- Commitment Control
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools
- Change My Password
- My Personalizations

SetID: STATE *Status: Approved

Contract ID: 42700-023-EQ-47400-105

Administrator: PSMITH Pamela G Smith 404-651-9175

▼ Authored Document

Authored Status: Executed Version: 2.00 Amendment: 1 [Maintain Document](#)

▼ Header

Process Option: General Contract [Add Comments](#) [Activity Log](#)

Vendor: TRASHMANRE-001 [Contract Activities](#) [Document Status](#)

Vendor ID: 0000041325 THE TRASHMAN [Primary Contact Info](#) [Thresholds & Notifications](#)

RECYCLING & DISPOSAL [Contract Agreement](#)

Begin Date: 07/07/2008 [Amount Summary](#)

Expire Date: 09/30/2011

Currency: USD CRRNT

Primary Contact:

Vendor Contract Ref:

Description: Trash Removal

Master Contract ID:

Maximum Amount: 8,400.00 USD

Line Released: 0.00

Open Item Relsd: 0.00

Total Released Amount: 0.00

Remaining Amount: 8,400.00

Tax Exempt STATE OF GA Fiscal Year: 2011 100.00

You will enter a comment to explain the action being taken. Provide as much information as possible



Lesson 2: Amending and Modifying Contracts

Closing a Contract—Add a Comment

Select Major Version and the Configurator and Enter Comments

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Fav

Contract Entry

Header Comments

SetID: STATE Contract ID: 42700-023-EQ-47400-105

Retrieve Active Comments Only

*Sort Method: *Sort Sequence:

Comments Find | View All First 1 of 1 Last

[Copy Standard Comments](#) Comment Status: Active

Contract is being closed as of 9/30/2011 after being extended for 90 days. This action is being taken because the contract expired and was not renewed due to the fact that a new SWC was implemented for Trash Removed.

Send to Vendor Shown at Receipt Shown at Voucher Copy to Purchase Order

Associated Document

Attachment Email

From -> CNT STATE-42700-023-EQ-47400-105

Enter the comments

If you decided to attach a recent Contract Assessment form DO NOT DO SO HERE.

Instead, go to Maintain Document and attach that form on the contract itself



Lesson 2: Amending and Modifying Contracts

Change the System Status to Closed and Save

The System Status for an Expired Contract is Closed

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign

SetID: STATE *Status: **Closed**

Contract ID: 42700-023-EQ-47400-105

Administrator: PSMITH Pamela G Smith 404-651-9175

▼ Authored Document

Authored Status: Executed Version: 2.00 Amendment: 1 **Maintain Document**

▼ Header

Process Option: General Contract [Edit Comments](#) [Activity Log](#)

Vendor: TRASHMANRE-001 [Contract Activities](#) [Document Status](#)

Vendor ID: 0000041325 THE TRASHMAN [Primary Contact Info](#) [Thresholds & Notifications](#)

RECYCLING & DISPOSAL [Contract Agreement](#)

Begin Date: 07/07/2008 [Amount Summary](#)

Expire Date: 09/30/2011 Maximum Amount: 8,400.00 USD

Currency: USD CRRNT Line Released: 0.00

Primary Contact: Open Item Relsd: 0.00

Vendor Contract Ref: Total Released Amount: 0.00

Description: Trash Removal

Master Contract ID: Remaining Amount: 8,400.00

Tax Exempt STATE OF GA Fiscal Year: 2011 Remaining Percent: 100.00

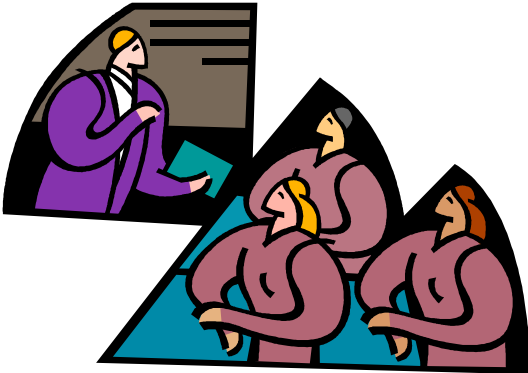
Set the system status to Closed

To add any attachments, you must go to Maintain Document which opens the Contract page and attach the documents to the Contract!



Demo 2.5 Canceling a Contract

Cancel the Pest Control Contract



- Locate the *Executed Pest Control* contract
- Enter a comment explaining the action being taken
- Indicate the change in the Renewal Status link
- Go to Maintain Document and attach all related documents
- Return to the Header and change the system status to Canceled

Scenario: It is October 10, 2011 and Contract Administrator PSMITHXX needs to Cancel the Pest Control contract for poor performance (for cause). He has tried to work with the Supplier for three months and has seen no improvement. He has an updated Contract Assessment form, a Vendor Performance Report, a Cure letter, and a document containing several emails to support this action.



Lesson 2: Amending and Modifying Contracts

Canceling a Contract—Enter Comment Explaining Cancellation

Find the Contract to be Canceled and Add Comments

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

SetID: STATE *Status:

Contract ID: 42700-023-EQ-47400-100

Administrator: PETER SMITH01

▼ Authored Document

Authored Status: Executed Version: 3.00 Amendment: 2

▼ Header

Process Option: General Contract [Activity Log](#)

Vendor: ACTIVEPEST-001 [Contract Activities](#) [Document Status](#)

Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC [Primary Contact Info](#) [Thresholds & Notifications](#)

[Contract Agreement](#)

Begin Date: 07/01/2010 [Amount Summary](#)

Expire Date: 06/30/2012 Maximum Amount: 9,600.00 USD

Currency: USD CRRNT Line Released: 0.00

Primary Contact: Open Item Relsd: 0.00

Vendor Contract Ref: Total Released Amount: 0.00

Description: Pest Control

Master Contract ID: Remaining Amount: 9,600.00

Tax Exempt Fiscal Year: Remaining Percent: 100.00



Lesson 2: Amending and Modifying Contracts

Canceling a Contract—Enter Comment Explaining Cancellation

Enter a Comment indicating Reason for Canceling

TGMP TRAINING FN90TRN - TEST

Home Worklist Add t

Contract Entry

Header Comments

SetID: STATE Contract ID: 42700-023-EQ-47400-100

Retrieve Active Comments Only

*Sort Method: *Sort Sequence:

Comments First Last

Comment Status: Active

Send to Vendor Shown at Receipt Shown at Voucher Copy to Purchase Order

Associated Document

Attachment Email

From: CNT STATE-42700-023-EQ-47400-100

Internet

Indicate reason for Canceling the contract. Date and “sign” comment. Indicate that all applicable documents are attached to the contract



Lesson 2: Amending and Modifying Contracts

Canceling a Contract— Attach Documentation

Enter the Maintain Document Section to Attach Cancel Documents

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign

SetID: STATE *Status: Approved

Contract ID: 42700-023-EQ-47400-100

Administrator: PSMITH01 PETER SMITH01

▼ Authored Document

Authored Status: Executed Version: 3.00 Amendment: 2 **Maintain Document**

▼ Header

Process Option: General Contract [Edit Comments](#) [Activity Log](#)

Vendor: ACTIVEPEST-001 [Contract Activities](#) [Document Status](#)

Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC [Primary Contact Info](#) [Thresholds & Notifications](#)

Begin Date: 07/01/2010 [Contract Agreement](#)

Expire Date: 06/30/2012

Currency: USD CRRNT

Primary Contact:

Vendor Contract Ref:

Description: Pest Control

Master Contract ID:

Tax Exempt STATE OF GA Fiscal Year: 2011

Amount Summary	
Maximum Amount:	9,600.00 USD
Line Released:	0.00
Open Item Relsd:	0.00
Total Released Amount:	0.00
Remaining Amount:	9,600.00
Remaining Percent:	100.00



Lesson 2: Amending and Modifying Contracts

Canceling a Contract— Attach Documentation

Reset to Dispatch to Enable Documents to be Attached

IGMP TRAINING FN90 TRN - TEST

Home | Worklist | Add to Favorites

Sponsor: Department: [Document Attributes](#)

Amendment: 2 Created On: 07/06/10 10:42AM [Modify Attachments/Related Documents](#)
 Version: 3.00 Last Modified On: 07/07/10 2:08PM [External Contacts List](#)
 Status: Executed [Document View Access](#)

Reset to Dispatch
 Create Amendment

Collaborated On:
 Approved On: 07/07/10 2:06:59PM
 Dispatched On: 07/07/10 2:07:14PM
 Executed On: 07/07/10 2:08:06PM

Includes Imported Document

View and Edit Options: [View Original Document](#)
[View Document](#)
[Document Version History](#)

Review and Approval: [Approval Details](#)
[Document Modification Summary](#)
[Generation Log](#)

Other Document Actions: [Import Prior Document](#)
[Deactivate Document](#)



Lesson 2: Amending and Modifying Contracts

Canceling a Contract— Attach Documentation

Attach Cure Letter and Contract Performance Documents

Attachments Customize | Find | First 1-9 of 9 Last

Files	Description			
Allow for Email	File Name	Title	View	Delete
<input checked="" type="checkbox"/>	Amendment.doc	Amendment to include services to building F-2	View	<input type="button" value="-"/>
<input checked="" type="checkbox"/>	NOAA.doc	NOAA for renewal 7/1/2011-6/30/2011	View	<input type="button" value="-"/>
<input checked="" type="checkbox"/>	Contract_Assessment_Form.doc	Contract Assessment 5/25/2010	View	<input type="button" value="-"/>
<input checked="" type="checkbox"/>	Signed_renewal.doc	Signed Renewal 5/31/2010	View	<input type="button" value="-"/>
<input type="checkbox"/>			View	<input type="button" value="-"/>
<input checked="" type="checkbox"/>	Cure_Letter.doc	Cure letter regarding poor performance	View	<input type="button" value="-"/>
<input checked="" type="checkbox"/>	Document_with_emails.doc	Document with emails regarding poor performance	View	<input type="button" value="-"/>
<input checked="" type="checkbox"/>	Vendor_Performance_Report.doc	Vendor Performance Report 10/01/2011	View	<input type="button" value="-"/>
<input checked="" type="checkbox"/>	Contract_Assessment_Form.doc	Updated Contract Assessment 9/30/2011	View	<input type="button" value="-"/>

Related Documents Customize | Find | View All | First 1 of 1 Last

Allow for Email	*Source Transaction	*SetID	Ad Hoc ID	Internal	Document Status
<input type="checkbox"/>	Ad Hoc	STATE		<input type="checkbox"/>	

OK Cancel



Lesson 2: Amending and Modifying Contracts

Canceling a Contract— Attach Documentation

Return to Contract Header

The screenshot shows a web application interface for 'IGMP TRAINING FN90 TRN - TEST'. The page title is 'Document Management'. The contract ID '42700-023-EQ-47400-100' is highlighted with a red box. The contract details include:

- SetID: STATE
- Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC
- Document Type: SPD Agency Services Contract
- Description: Pest Control
- Administrator: PETER SMITH01
- Sponsor: [blank]
- Department: [blank]

Additional information and actions:

- Amendment: 2
- Version: 3.00
- Status: Dispatched
- Created On: 07/06/10 10:42AM
- Last Modified On: 07/07/10 3:59PM
- Collaborated On: [blank]
- Approved On: 07/07/10 2:06:59PM
- Dispatched On: 07/07/10 2:07:14PM

Buttons and links include: 'Send to Contacts', 'Execute Contract', 'Includes Imported Document', 'Return to Document Search', 'Document Attributes', 'Modify Attachments/Related Documents', 'External Contacts List', and 'Document View Access'.

There is no Amendment created for a Canceled contract and you do not Execute



Lesson 2: Amending and Modifying Contracts Canceling a Contract— Change Renewal Status to Cancelled

Change Renewal Status to Canceled

Home Worklist Add L

Authorized Status: Dispatched Version: 3.00 Amendment: 2 [Maintain Document](#)

Header

Process Option: General Contract [Add Comments](#) [Activity Log](#)
[Contract Activities](#) [Document Status](#)
Vendor: ACTIVEPEST-001 [Primary Contract Info](#) [Thresholds & Notifications](#)
Vendor ID: 0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC [Contract Agreement](#)

Begin Date: 07/01/2010 [Amount Summary](#)
Expire Date: 06/30/2012 Maximum Amount: 9,600.00 USD
Currency: USD CRRNT Line Released: 0.00
Primary Contact: Open Item Reisd: 0.00
Vendor Contract Ref: Total Released Amount: 0.00
Description: Pest Control Remaining Amount: 9,600.00
Master Contract ID: Remaining Percent: 100.00
 Tax Exempt STATE OF GA Fiscal Year: 2011

Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date
 Corporate Contract Adjust Vendor Pricing First **Rate Date: 07/06/2011**
 Lock Chartfields Price Can Be Changed on Order Initial Period [Renewals](#)

[PO Open Item Pricing](#)

Home

Entry

Contract Renewals

SetID: STATE Contract Id: 42700-023-EQ-47400-100

Renewal Status: **Cancelled** Renewal #: of:
Renewal from: To: **10/15/2011**

Change the Renewal Status to Cancelled and enter the date the contract was canceled in the To field



Lesson 2: Amending and Modifying Contracts

Set the System Status to Canceled

Change the System Status to Canceled

TGMP TRAINING FN90 TRN - TEST

Home | Worklist | Add to Favorites

New Window | Customize

Contract | Create Release | Review Releases

SetID: STATE *Status: **Canceled**

Contract ID: 42700-023-EQ-47400-100

Administrator: PSMITH01 PETER SMITH01

▼ Authored Document

Authored Status: Dispatched Version: 3.00 Amendment: 2 [Maintain Document](#)

▼ Header

Process Option:	General Contract	Add Comments	Activity Log
Vendor:	ACTIVEPEST-001	Contract Activities	Document Status
Vendor ID:	0000438587 ACTIVE PEST CONTROL OF MIDDLE GA INC	Primary Contact Info	Thresholds & Notifications
Begin Date:	07/01/2010	Contract Agreement	
Expire Date:	06/30/2012	Amount Summary	
Currency:	USD CRRNT	Maximum Amount:	9,600.00 USD
Primary Contact:		Line Released:	0.00
Vendor Contract Ref:		Open Item Relsd:	0.00
		Total Released Amount:	0.00

You will get messages that your action will cancel the contract.

Click OK to both messages



Lesson 2: Amending and Modifying Contracts

Canceling (or Closing) a Contract with Pending POs

Contract **Create Release** Review Releases

SetID: STATE *Status: **Canceled**

Contract ID: SWCS000546-043

Administrator: EASONEH Elizabeth H Eason 404.657.6877

▼ Authored Document

Authored Status: Executed

▼ Header

Process Option: General Contract

Vendor: CISCOSYS-002

Vendor ID: 0000015795

Begin Date: 04/01/2000

Expire Date: 06/30/2010

Currency: USD CRRNT

Primary Contact: 2

Vendor Contract Ref: SWC

Description:

Master Contract ID:

Tax Exempt Fiscal Year:

▼ Order Contract Options

Allow Multiple POs Allow Open Item Reference Must Use Contract Rate Date

Windows Internet Explorer

Cannot cancel contract. At least one active transaction is referencing this contract. (10400,286)

OK

[Contract Agreement](#)

Amount Summary	
Maximum Amount:	0.00 USD
Line Released:	0.00
Open Item Relsd:	5,270.76
Total Released Amount:	5,270.76

If this message appears when you attempt to Cancel a contract, you will not be able to cancel the contract until all POs have been dispatched and paid.

When this happens, change the Status to first to Open and change the Expire date to the Cancellation date, and then set the system status to Approved---until the PO process is completed. Once the PO process is completed, return and change the status to Canceled



Setup View Access to Your Contract Document

TGMP TRAINING FN90TRN - TEST

Home | Worklist | Add to Favorites | Sign out

New Window | Customize Page | help

Menu

Search:

- My Favorites
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
 - Create Contracts and Documents
 - Contract Entry
 - Document Management
 - My Collaborators/View Access
 - Monitor and Update
- Agreements
 - Manage Contract Library
 - Search Content
- eProcurement
 - Services Procurement
 - Commitment Control
 - Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

My Internal Contacts / Collaborators

Default Collaborators [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

User	Description	Collaborator	Can Edit During Collaboration
<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Role Level View Access [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Role Name	Description
GA_SC_CONTRACT_MANAGEMENT	

Save | Notify | Add | Update/Display

So all contract administrators will have access to your State Entity's contracts



Linking POs to Contracts

All Purchase Orders should be linked to a contract in the Contract ID field or should have awarded from a Sourcing Event

Maintain Purchase Order

Purchase Order

Unit: 46100 PO Status: Dispatched ▲ ✖
 PO ID: 0000116286 Budget Status: Valid
 Copy From: Hold From Further Processing

Header

*PO Date: 05/05/2010 Vendor Search Doc Tol Status: Valid
 Vendor: GLOVERWHOL-00 Vendor Details Backorder Status: None [Create BackOrder](#)
 *Vendor ID: 0000009778 GLOVER WHOLESALE COMPANY Receipt Status: Partial
 *Buyer: DAKING Deborah King 706-565-4396 *Dispatch Method: Print
 PO Reference: AC-DJJ 91 Glover SM FOOD

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#) [Document Status](#)
[Edit Comments](#) [Requisitions](#)

Amount Summary

Merchandise: 3,425.03
 Freight/Tax/Misc.: 0.00
 Total Amount: 3,425.03 USD

Add Items From Select Lines To Display

[Catalog](#) [Item Search](#) Line: To:

Lines

Line	Item	Description	SetID	Contract ID	Contract Line	Release	Milestone
1		"Beans, Baked "	STATE	46100-031-DJJ0000091-0002	1		7
2		"Beans, Green "	STATE	46100-031-DJJ0000091-0002	2		8

Annotations:

- Link the PO line to the contract
- If open item reference on contract is unchecked, link to contract line.



Webinar Summary

Importing your State Entity Contract

Amending Contracts

Renewing Contracts

Extending Contracts

Closing an Expired Contract

Canceling a Contract

Questions?





Support Mechanisms and Processes

- **Level 0 – State Entity trainers and Super Users**
- Level 1 – State Purchasing Division Helpdesk Staff at 404-657-6000 and procurementhelp@doas.ga.gov
- Level 2 – State Purchasing Division Business Analysts
- Level 3 – State Accounting Office Business Analysts
- Level 4 – State Accounting Office Technical Staff
- Level 5 – GETS



Practicing After this Class

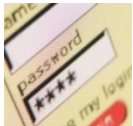
You can always practice using the Team Georgia Marketplace™ user lab environment.



- User lab access for users:
<https://tgmp.state.ga.us/psp/fscmlab/?cmd=login>



- User lab access for suppliers:
<https://tgmp.state.ga.us/psp/fscmlab/SUPPLIER/ERP/h/?tab=DEFAULT>



- User IDs and Passwords:
 - Userids are the same as those used in class (PSMITHXX for Contract Administrator and LMOOREXX for the Collaborator)



Supplier Contracts Queries and QRGs

Quick Reference Guides

- Contract Entry—to enter Header Page information
- Create Document—to create a contract
- Create an Amendment—to create a Contract Amendment
- Cancel Contract—to Cancel a Contract
- Create Contract Renewal—to renew a Contract
- Create Contract Agreements—to create a Contract Agreement

Contract Queries (selected)

- 0S006_AC_SETUP_WRONG—what contracts are not set up correctly
- 0SC005_AC_NO_BUS_UNIT—find contracts not linked to business units
- 0SC007_AGREEMENT_STATUS—view agreement codes and statuses
- 0SC008_CNTRCT-NO_DOC_NOR_EXECT—find contracts with no documents
- 0SC009_PO_NO_CONTRACT—locate PO's not linked to contracts



Thank you for participating!

