

# Team Georgia Marketplace™



## **Super User Update** **Strategic Sourcing and Contracts**

*July 21, 2010*



# Agenda

- Overview of Super User Role and Responsibilities
- Common Issues in Team Georgia Marketplace
- Updates and Problem Solving
  - Strategic Sourcing
    - Creating an Event
    - Maintaining an Event
    - Analyzing an Event
  - Contracts: “How do I...”

# Overview

- **One Year +**
  - Team Georgia Marketplace™ is celebrating the completion of one year of post pilot deployment waves which includes 12 agencies, approximately 3200 users, and nearly \$1.4 billion captured in addressable state spend. Great job everyone!
- **Super User Program**
  - Super Users were trained before other users, along with agency trainers, to learn module details and to have the time to prepare for Go Live as the first line of support. Their support has been referred to as Level 0.
  - DOAS would like to enhance the super user program to maximize its benefits to the agencies. Our goal is to assist your agency create and sustain a vibrant super user/Level 0 program that meets the needs of your users.



# Benefits from Super User Program

## Agency Super Users

- Provide rapid access for agency users to Super User expertise
- Assist users to avoid problems before they occur
- Monitor and communicate issues and solutions to all users
- Train new users on agency business processes



# Roles and Responsibilities

- Provide support to agency users in his or her field of expertise.
- Answer agency user questions and solve problems when possible.
- Be the conduit between the agency and the Help Desk.
- Share solutions with agency users.



# Attributes of Super Users

- Knowledge of Agency Business Processes
- Strong experience in the business processes they are going to support
- Ability to use Team Georgia Marketplace™
- Ability to help users with processes and problem solutions
- Interest in helping others to succeed
- Time available to coach other users



# Support for Super Users

- Ad hoc classes in all modules
- Updates and webinars specific to Super Users
- Emails with communication on important information for their modules
- Monthly report on agency issues
- Please send other suggestions to Licia Duryea:  
[lduryea@sao.ga.gov](mailto:lduryea@sao.ga.gov)



# User Group Meetings

- Our User Group meets
  - the third Tuesday of the month
  - 2:00 – 4:00 PM
  - Room 1816A
- If you would like an invitation to the User Group, please contact Licia Duryea: [lduryea@sao.ga.gov](mailto:lduryea@sao.ga.gov)



# Your Presenter



**Carissa Cox**

**Title:** Business Analyst

**Education:** B.S. Computer  
Information Systems

**Contact:**

carissa.cox@doas.ga.gov

404-463-4037

# How do I define the Event Summary?

**Modify an Event**

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**Event Summary**

Business Unit: 40300    Event ID: DAS0000028    Round: 1    Version: 1    Event Format: Buy

Event Type: Rfx	RF Type: <input type="text"/>	Origin: <input type="text"/>	Fiscal Year: <input type="text" value="2011"/>
Event Status: Open	<a href="#">Change to Auction</a>	Preview Date: <input type="text" value="06/10/2010 10:00AM EDT"/>	<input type="text" value="06/10/2010 10:00AM EDT"/>
*Event Name: <input type="text"/>		*Start Date: <input type="text" value="06/10/2010 10:00AM EDT"/>	<input type="text" value="06/30/2010 5:00PM EDT"/>
Description: <input type="text"/>		*End Date: <input type="text" value="06/30/2010 5:00PM EDT"/>	Copy From: <input type="text"/>
Category Type: <input type="text"/>	Purchase Type: <input type="text"/>		<input type="button" value="Go"/>



# What Posts to the GPR?

## Bid Information

Close Window

<b>Bid Title</b>	Statesboro Hangar Door Installation
<b>Bid Number</b>	40300-DAS0000029
<b>Agency</b>	40300-ADMINISTRATIVE,SERVICES AGENCY
<b>Contact Person</b>	Faith E Scruggs 404-657-9443
<b>Contact Phone Number</b>	
<b>Contact E-mail Address</b>	faith.scruggs@doas.ga.gov
<b>Bid Process</b>	RFQ
<b>Purchase Type</b>	Open Market Purchase
<b>Category Type</b>	Goods
<b>Date Posted</b>	May 5, 2010
<b>Bid Closing Date/Time</b>	May 19, 2010@3:00 PM
<b>Last Revision Date</b>	May 14, 2010@3:10 PM
<b>Bid Status</b>	Awarded
<b>Government Type</b>	state
<b>Fiscal Year</b>	10

**Description Information:**

Pursuant to the State Purchasing Act (Official Code of Georgia Annotated §§50-5-50 et. seq.), this electronic Request for Quotes (eRFQ) is being issued to establish one contract with one qualified Offeror who will provide for the purchase and installation of a hangar door at the Statesboro location to the Georgia Aviation Authority (hereinafter, the State Entity) as further described in this eRFQ.

# When do I use an RFI Event?

- RFI - Request for Information
  - The purpose of the RFI is to collect information about the capabilities of various bidders/suppliers to allow you to pre-qualify your bidders/suppliers.
  - RFI Responses can be scored.

### Event Workbench

▼ Search Criteria

Event ID:     From Start Date:      To Start Date:      Sort With:

Created By:      From End Date:      To End Date:      Sort Order:

Event Format:     Category:     Business Unit:      Only show Events I created

Event Name:     Item ID:     Fiscal Year:      Use my search defaults

Event Status:     Item Descr:     Origin:        

Associated With Plan:      Plan Name:      [Default Search Preferences](#)

▶ Legend

Search Results Find | View All    First  Last

Event ID	Name	Format	Type	Origin	Buyer	Unit	Status
<a href="#">DOR0000003</a>	License Plates	RFI	RFx	SPD		47400	RFI Reviewed

   



# What are the Event Settings and Options?

**Modify an Event**

---

**Event Settings and Options**

Business Unit: 40300    Event ID: DAS0000028    Round: 1    Version: 1    Event Format: Buy    Event Type: RFx

---

<input type="checkbox"/> Allow Bidder XML Downloads	Round/Version Display: <input type="text" value="Display Round and Version"/>
<input type="checkbox"/> Bid Required On All Lines	<input checked="" type="checkbox"/> Sealed Event
<input type="checkbox"/> Multiple Bids Allowed	<input type="checkbox"/> Display Bid Factor Weightings
<input checked="" type="checkbox"/> Allow Edit of Posted Bids	

---

Factor Event Score Into: <input type="text" value="Total Score"/>	Start Price: <input type="text" value="Do Not Display"/>
Header Weighting: <input type="text"/>	



# What do I define on the Payment Terms and Contact Information page?

**Modify an Event**

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**Event Contact Details**

**Payment & Currency Information**

*Currency:	<input type="text" value="USD"/>	<a href="#">Exchange Rate</a>	*Rate Type:	<input type="text" value="CRRNT"/>
Pay Method:	<input type="text" value=""/>		Rate Date:	<input type="text" value="06/05/2010"/>
Payment Terms:	<input type="text" value=""/>		<input type="checkbox"/> Allow bids in other currencies	
Bill Addr:	<input type="text" value="PO_001002"/>		<input checked="" type="checkbox"/> Tax Exempt	
Buyer:	<input type="text" value="FESCRUGG"/>		Exempt ID:	<input type="text" value="State of GA"/>

**Event Contact**

Contact Name:	<input type="text" value="John Williams"/>
Email ID:	<input type="text" value="fscmtst@sao.ga.gov"/>
Phone:	<input type="text" value="404-463-5000"/>



# Strategic Sourcing Definitions

- Bid Quantity Rule
  - Allow Extra Quantity to be Bid: Select to allow bidders to place bids for quantities beyond the requested event quantity up to the maximum bid quantity.
  - Bid Up to Maximum Quantity: Select to allow bidders to place bids up to a maximum quantity for the line.



# Strategic Sourcing Definitions

- Bid Quantity Rule *(continued)*
  - Quantity Not Applicable: Bidders must enter a bid price, but not a bid quantity. This option is used when the award is based on dollars.
  - Requested Quantity Required: Select to indicate that bidders must place bids for the requested quantity only.



# Where do I define the Bid Quantity Rule?

**Create an Event**

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**Line Details**

Event ID: NEXT Requested Quantity: 2.8000  
 Line: 1 Start Price: 41.9900  
 Physical Nature: Goods

Description: SPLS 8.5X14 COPY CS

**Shipping Information** Find | View All First 1 of 1 Last

Schedule: 1

Quantity: 2.8000 Due Date: 08/07/2010 Freight Terms:   
 Ship Via: COMMON Ship To: PO\_217001 Ship From:   
**Bid Parameters**

Reserve Price:   Bid Required

Min Quantity: 0.0000 Max Quantity: 2.8000

**Bid Quantity Rule:** Requested Quantity Required

Alternate Units of Measure: Allow Extra Quantity to be Bid  
 User Defined Price Breaks Bid Up to Maximum Quantity  
 Quantity Not Applicable  
 Requested Quantity Required

**Item Specification**

**Line Image**

# How do I Invite Bidders/Supplier to an event for a related NIGP Code?

**Bidder Search**

**Search Criteria**

Bidder Type: Bidder

Company:  State:

ID:  City:

Contact:  Country:

Group ID:  Postal:

Group Name:

SIC Type: NIGP

SIC Code: 91827

Recommend Bidders

Maximum Rows retrieved: 99999 Search

[Select All](#) [Deselect All](#)

**Search Results** [Customize](#) | [Find](#) | [View All](#) | First 1-3 of 3 Last

Bidder ID	Name	Bidder Company	Invite
1 BID0001725	Gordon Burns	Gordon Burns & Associates, P.C.	<input type="checkbox"/>
2 BID0009949	Patricia Stuit	CRITIGEN	<input type="checkbox"/>
3 BID0010008	Chalonda Smith	Ed Benson & Associates, Inc.	<input type="checkbox"/>

OK Cancel Refresh

# What are Event Bid Factors?

- Determining what bid factor to use
- Understanding Ideal Response Required

**Modify an Event**

---

**Event Bid Factors**

Event ID: DAS0000028      Bid Factor Weighting Total:  
Event Name: Airline Hangers      Remaining Bid Factor Weight: 100.00000

**Bid Factors**

Seq Nbr:	1	*Bid Factor:	BRAND/MANUFACTURE 	Type:	Text	Weighting:	0.00000  
Question:	What is the brand/manufacturer's name that you are quoting?			 	<input checked="" type="checkbox"/> Display Bid Factor?		
					<input checked="" type="checkbox"/> Bid Factor Response Required		
					<input type="checkbox"/> Ideal Response Required		
					<input type="checkbox"/> Include on Contract		
Ideal:	<input type="text"/>						

# What are Event Bid Factors?

- Event Bid Factors
  - Include on Contract (Do not use at this time)

Seq Nbr: 5 \*Bid Factor: Q-NON-COLLUSION Type: Yes/No Weighting: 0.00000

Question: Have you read and do you agree to the Certificate of Independent Price Determination and Certificate of Non-Collusion as stated in the eRFQ Instructions attachment?

Yes/No  
 Yes  No

Display Bid Factor?  
 Bid Factor Response Required  
 Ideal Response Required  
 **Include on Contract**

▶ Cost Contribution

[Comments and Attachments](#) [Add Clauses To Bid Factor](#)

Select for deletion



# What are Line Bid Factors?

- Line Bid Factors
  - Default is always “What is your Bid Price”
  - Do not remove this bid factor, but you can add additional bid factors if required at the line level.

**Modify an Event**

---

**Line Bid Factors**

Line: 1 Bid Factor Weighting Total: 100.00000  
 Item ID: Remaining Bid Factor Weight: 0.00000  
 Description: Hangar Door Installation

**Bid Factors**

Seq Nbr:	1	Bid Factor:	BID_PRICE	Type:	Monetary	Weighting:	100.00000	+ -
Question:	<div style="border: 1px solid gray; padding: 2px;">           What is your bid price?         </div>				<input checked="" type="checkbox"/> Display Bid Factor <input checked="" type="checkbox"/> Bid Factor Response Required <input type="checkbox"/> Ideal Response Required <input type="checkbox"/> Include on Contract			
Best:	0.000000	Worst:	22000.000000					

▶ Price Components  
▶ Cost Contribution

# How do I define comments and add attachments?

**Event Header Comments and Attachments**

Event ID: DAS0000021

Enter Comments First 1 of 2 Last

Comments: + -

Please find the following attachments for Event 40300-DAS0000021:  
 Hangar Door Installation eRFQ Instructions  
 Sample Contract  
 6 Hangar Photos

Send To Bidder     Include On Award    [Standard Comments](#)

Add Attachment

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First 1 of 9 Last

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
1 Hangar_Door_Installation_eRFQ.doc	eRFQ Instructions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -
2 SPD-CP013AgencyStandardContractforGoodsandAncillaryServices.doc	Sample Contract	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -
3 100_1378.JPG	Hangar Photo 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -
4 100_1379.JPG	Hangar Photo 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -



**Enter Comments** First 3 of 3 Last

Comments: + -

06/25/2010 Version #3 was created to add response for the Questions and Answer period. Please review the Question and Answer Responses

Send To Bidder     Include On Award    [Standard Comments](#)

Add Attachment

---

First 1-9 of 9 Last

<u>Attached File</u>	<u>Attachment Description</u>	<u>Display to Bidder</u>	<u>Include On Award</u>	<u>Include in Notifications</u>	
1 100_1378.JPG	Picture of Hangar 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -
2 100_1379.JPG	Picture of Hangar 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -
3 100_1380.JPG	Picture of Hangar 3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -
4 100_1381.JPG	Picture of Hangar 4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -
5 100_1382.JPG	Picture of Hangar 5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -
6 100_1383.JPG	Picture of Hangar 6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -
7 GAA_Statesboro_Hangar_Door_Installation.doc	Hangar Door Installation eRFQ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -
8 eRFQ_Instructions.doc	eRFQ Instructions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -
9 Q_and_A_Statesboro_Hangar_Door_Installation_06252010.doc	Questions and Answer Respon	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 -

# How do I use the Event Workbench?

**Event Workbench**

Search Criteria

Event ID:  From Start Date:  To Start Date:  Sort With:

Created By:  From End Date:  To End Date:  Sort Order:

Event Format:  Event Type:  Category CD:  Business Unit:   Only show Events I created

Event Name:  Item ID:  Fiscal Year:   Use my search defaults

Event Status:  Item Descr:  Origin:

Associated With Plan  Plan Name  [Default Search Preferences](#)

Legend

Search Results Find | View All | 1-8 of 8 | Last

Event ID	Name	Format	Type	Origin	Buyer	Unit	Status	
<a href="#">DAS0000011</a>	REPOST OF VEHICLE ...	Buy	RFx	233	FESCRUGG	40300	Awarded	<input type="button" value="Event History"/>
<a href="#">DAS0000012</a>	Auction Services	Buy	RFx	233	FESCRUGG	40300	Cancelled	<input type="button" value="Analyze Bids"/> <input type="button" value="Bid History"/>
<a href="#">DAS0000020</a>	RADAR ALTIMETER SY...	Buy	RFx	401	FESCRUGG	40300	Awarded	<input type="button" value="Event History"/> <input type="button" value="Bid History"/>
<a href="#">DAS0000021</a>	Hangar Door Instal...	Buy	RFx	401	FESCRUGG	40300	Awarded	<input type="button" value="Event History"/> <input type="button" value="Bid History"/>
<a href="#">DAS0000028</a>	Statesboro Hangar ...	Buy	RFx	401	FESCRUGG	40300	Open	<input type="button" value="Cancel Event"/> <input type="button" value="New Version"/>
<a href="#">DAS0000029</a>	Statesboro Hangar ...	Buy	RFx	401	FESCRUGG	40300	Pending Award	<input type="button" value="Cancel Event"/> <input type="button" value="Event History"/> <input type="button" value="New Version"/>

# How do I cancel an Award made to a Purchase Order?

**Analyze Events**

[Analyze Total](#)   [Analyze Line](#)   [Review Constraints](#)   [Award Summary](#)   [Award Details](#)   [Distribution Defaults](#)

**Business Unit:** 40300   **Event ID:** DAS0000021   **Round:** 1   **Version:** 3   **Event Name:** Hangar Door Installation

**Event Format:** Buy   **Event Type:** RFx   **Currency:** USD   **End Date:** 03/10/2010 4:30PM EST   **Status:** Awarded   **Go To:**

Show Award Details to Bidders

Display bids    Display all bids    Display bid scores    Display bid's total bid price    Display factors

**Award Details** First  1 of 2  Last

**Bidder Name:** [Hangar Door Solutions LLC](#)   **Bidder Type:** Vendor   **Buyer:**

**Award Type:**    **Award Currency:**  USD   **Terms:**

**PO ID:** ➔ [0000003648](#)   **PO Business Unit:**

**Award Number:** 1   **Total Award:** 103295.0000

**Award Lines**

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price
1		<input checked="" type="checkbox"/>	<a href="#">Hangar Door Installation</a>	JOB	0.5000	103295.0000	51647.5000 <input type="button" value="📄"/> <input type="button" value="✎"/>



# What happens when a Purchase Order from a Sourcing Event award is canceled?

**Analyze Events**

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) [Award Summary](#) [Award Details](#) [Distribution Defaults](#)

Business Unit: 40300    Event ID: DAS0000021    Round: 1    Version: 3    Event Name: Hangar Door Installation

Event Format: Buy    Event Type: RFx    Currency: USD    End Date: 03/10/2010 4:30PM EST    Status: **Pend Award**    Go To: ... Main Content

▼ Show Award Details to Bidders

Display bids     Display all bids     Display bid scores     Display bid's total bid price     Display factors

**Award Details** First 1 of 2 Last

Bidder Name: [Hangar Door Solutions LLC](#)    Bidder Type: Vendor    Buyer: FESCRUGG

Award Type: Purchase Order    Award Currency: Event USD    Terms: N30

PO ID: **0000003648**    PO Business Unit: 40300

Award Number: 1    Total Award: 103295.0000

**Award Lines**

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price
1		<input checked="" type="checkbox"/>	<a href="#">Hangar Door Installation</a>	JOB	0.0000	103295.0000	0.0000

**Post Award**

# How do I cancel an award made to a General Contract?

**Analyze Events**

[Analyze Total](#)   [Analyze Line](#)   [Review Constraints](#)   [Award Summary](#)   [Award Details](#)   [Distribution Defaults](#)

**Business Unit:** 40300   **Event ID:** DAS0000021   **Round:** 1   **Version:** 3   **Event Name:** Hangar Door Installation

**Event Format:** Buy   **Event Type:** RFx   **Currency:** USD   **End Date:** 03/10/2010 4:30PM EST   **Status:** Pend Award   **Go To:** ...

Show Award Details to Bidders

Display bids    Display all bids    Display bid scores    Display bid's total bid price    Display factors

**Award Details** First 2 of 2 Last

**Bidder Name:** [Hangar Door Solutions LLC](#)   **Bidder Type:** Vendor   **Buyer:** CDCOX

**Award Type:** General Contract   **Award Currency:** Event USD   **Terms:** N30

**Contract Id:** 40300-401-DAS0000021-0001   **PO Business Unit:** 40300

**Award Number:** 2   **Total Award:** 103295.0000

**Award Lines**

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price
1		<input checked="" type="checkbox"/>	<a href="#">Hangar Door Installation</a>	JOB	0.0000	103295.0000	0.0000

[Post Award](#)

Total Awarded Qty	Total Awarded Price	Quantity Remaining
0.0000	0.0000	1.0000



# I awarded my event. Why is the Event Status still showing Pending Award?

## Analyze Events

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#)

[Award Summary](#) [Award Details](#) [Distribution Defaults](#)

Business Unit: 40300  
Event ID: DAS0000021  
Round: 1  
Version: 3  
Event Name: Hangar Door Installation

Event Format: Buy  
Event Type: Rfx  
Currency: USD  
End Date: 03/10/2010 4:30PM EST

Status: **Pend Award**  
Go To:

Line	Item ID	Description	Requested Qty	Event Price	Extended Amount	Award Quantity	Award Amount	Quantity Remaining	Line Status
1		Hangar Door Installation	1.0000	30000.000000	30000.0000	0.0000	0.0000	1.0000	C
<b>Select</b>			<b>Awarded Qty</b>	<b>Total Line Amount</b>	<b>Extended Amount</b>				
<input type="checkbox"/>	Hangar Door Solutions LLC		0.0000	103295.00000	0.0000				
<input type="checkbox"/>	Hangar Door Solutions LLC		0.0000	103295.00000	0.0000				
<a href="#">Add Award for Selected Bidder</a> <a href="#">Schedule Defaults</a>									
<b>Event Award Summary:</b>						<b>Total Awarded Qty</b>	<b>Total Awarded Price</b>	<b>Quantity Remaining</b>	
<input type="button" value="Recalculate"/>						0.0000	0.0000	<b>1.0000</b>	



# How do I define the Award Details to the Bidders?

**Analyze Events**

[Analyze Total](#)   [Analyze Line](#)   [Review Constraints](#)   [Award Summary](#)   [Award Details](#)   [Distribution Defaults](#)

**Business Unit:** 40300   **Event ID:** DAS0000021   **Round:** 1   **Version:** 3   **Event Name:** Hangar Door Installation

**Event Format:** Buy   **Event Type:** RFx   **Currency:** USD   **End Date:** 03/10/2010 4:30PM EST   **Status:** Awarded   **Go To:**

Show Award Details to Bidders

Display bids    Display all bids    Display bid scores    Display bid's total bid price    Display factors

**Award Details** First  1 of 2  Last

**Bidder Name:** [Hangar Door Solutions LLC](#)   **Bidder Type:** Vendor   **Buyer:**

**Award Type:**    **Award Currency:**  USD   **Terms:**

**PO ID:** [0000003648](#)   **PO Business Unit:**

**Award Number:** 1   **Total Award:** 103295.0000

**Award Lines**

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price
1		<input checked="" type="checkbox"/>	<a href="#">Hangar Door Installation</a>	JOB	0.5000	103295.0000	51647.5000 <input type="button" value="📄"/> <input type="button" value="✎"/>



## What happens if your bidder becomes a supplier prior to the awarding of the event?

- The system will error and awarding may take longer than normal.
- Technical Support will need to update the associated Supplier's profile
- The bidder will need to register as a supplier



# What's required on the Distribution Default page?

- What happens when my Event starts with a requisition?

**Award Details**

Bid ID: 1    Bidder Setid: STATE    Bidder ID: 0000478475    PO Business Unit: 40300

**Distribution**

*Account	*Fund	*Dept	*Fund Src	Program	Class	PC Bus Unit	Project	Activity
1 100001	1	4030104000	01					



# Copying transactions into an Event

**Create an Event**

---

**Line Items**

Business Unit: 40300    Event ID: NEXT    Round: 1    Version: 1    Event Format: Buy    Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:

**Line Items**

- Contract
- Delimited File
- Item Master
- Purchase Order
- Request For Information
- Requisition
- Sourcing Event
- Sourcing Template

							Customize   Find   View All	First  1 of 1  Last
Line	Item ID	Category CD	*UOM	*Qty	Start Price	Ext. Amount	Weighting	
1	<input type="text"/>	0.00000	<input type="button" value="+"/> <input type="button" value="-"/>					
							Line Weighting Total: 0 %	Remaining Weight: 100 %

**Requisition Lines to Copy**

[Select All](#)     [Deselect All](#)

Select Lines						
Sel	Item SetID	Item	Description	Quantity	UOM	Price Currency
<input type="checkbox"/>	STATE		SPLS 8.5X14 COPY CS	2.8000	EA	41.99000 USD
<input type="checkbox"/>	STATE		POINTER LASER METAL	1.0000	EA	34.92000 USD





## Your Presenter



**Title:**

**Functional Consultant**

**Team Georgia  
Marketplace**

**Kyle Morton**

# How do I assign a business unit to a contract?

- Validating agency contracts are set up correctly – Assign your business unit

The screenshot shows the 'Contract' management interface. On the left is a 'Menu' sidebar with 'Contract Entry' selected. The main content area shows contract details for 'STATE' with contract ID '42700-401-DHS0000048-0001'. The status is 'Open'. A red box highlights the 'PO Defaults' link in the 'Order Contract Options' section, with an arrow pointing to it and the text 'Click the PO Defaults link'.



# What fields do I complete on the PO defaults?

- Validating agency contracts are set up correctly – Enter PO Defaults page

**PO Defaults**

SetID: STATE Cont **Validate BU** 00048-0001 Vendor ID: 0000478658

**Header**

\*Business Unit: 42700 [Copy from BU Defaults](#)

Vendor Loc: MAIN

Buyer: DANIMON Monica Daniels 404-656-4613

Origin: 369

Currency: USD CRRNT Billing Location: PO\_00 00001

Payment Terms ID: N30  Tax Exempt STATE OF GA

**Shipping Information**

Ship To: PO\_36 90 01 [Ship To Address](#) AM Business Unit:

Location: PO\_36 90 01  Capitalize

IN Unit:

Freight Terms: DN Profile ID:

Ship Via:  Cost Type:

Charge By: Amount Ultimate Use Code:

Where Performed:

*GL Unit	Account	Fund	Dept	Fund Src	Program	Class	PC Bus Unit	Project
42700								

[Add Comments](#)

Click OK - not cancel

OK Cancel Refresh



# How do I run a query to find contracts not linked to a Business Unit?

- Run query: OSC005\_AC\_NO\_BUS\_UNIT

Contract like:

Records Query Expressions Prompts Fields Criteria Having View SQL Run

**Contract like = 427%**

[View All](#) | [Rerun Query](#) | [Download to Excel](#) First 1-33 of 33 Last

	SetID	Contract	Vndr SetID	Vendor	Status	Descr	Buyer	Begin Dt	Expire Dt	Entered By	Corp Contract	Max. Amt	Open Item
1	STATE	427	STATE	0000069223	O	Child support calculator trg	EUBASHA	10/01/2009	06/30/2010	GAMBSHA	N	377610.000	Y
2	STATE	427-095-0016	STATE	0000165151	A	JANITORIAL SERVICES	MERKYUM	11/01/2009	06/30/2010	MERKYUM	Y	5200.000	N
3	STATE	427-095-006715	STATE	0000010828	A	MAINTENANCE, FAX	MERKYUM	07/01/2009	06/30/2010	MERKYUM	Y	0.000	N
4	STATE	427-095-006973	STATE	0000004274	A	EQUIPMENT LEASE, POSTAGE	MERKYUM	07/01/2009	06/30/2010	MERKYUM	Y	1560.000	N
5	STATE	427-095-	STATE	0000185871	A	MAINTENANCE	MERKYUM	07/01/2009	06/30/2010	MERKYUM	Y	1200.000	N



# How do I enter an agency contract?

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

SetID: STATE \*Status: **Approved**

Contract ID: 42700-401-DHS0000048-0001

Administrator: BAZHANN Annette Bazha [Add a Document](#)

**Header**

Process Option: General **Contract admin should be completed.**

Vendor: PAULKCO **Enter maximum amount**

Vendor ID: 0000478

Begin Date: 06/02/2010

Expire Date: 06/30/2011 **Expiration date should be completed.**

Currency: USD CRRNT

Primary Contact:

Vendor Contract Ref:

Description: **Corporate contract should be unchecked for agency contracts.** ne-Child Access-Vi

Master C:

Tax Exem STATE OF GA Fiscal Year:  **Fiscal Year completed**

**Order Contract Options**

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

Corporate Contract  Adj. Vendor Pricing First Rate Date: 06/02/2010

Lock Chartfields  Price Can be **Allow open item reference unchecked**

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

**Voucher Contract Options**

Maximum Amount: 0.00 USD  
Released: 0.00  
Item Relsd: 0.00  
Total Released Amount: 0.00



# How do I find out what contracts are not set up correctly?

- Run query: OSC006\_AC\_SETUP\_WRONG

Contract like:

Records Query Expressions Prompts Fields Criteria Having View SQL **Run**

Contract like = 427-93-1010015%

[View All](#) | [Rerun Query](#) | [Download to Excel](#)

First 1-3 of 3 Last

	SetID	Contract	Vndr SetID	Vendor	Status - A	Descr	Buyer	Begin Dt	Expire Dt	Entered By	Corp Contract - N	Max. Amt > 0	Open Item - Y	Year < 0
1	STATE	427-93-10100155-99	STATE	0000014907	O	Multi Funded Amendment		06/01/2010	06/30/2010	SURIMAD	N	330669.000	Y	2010
2	STATE	427-93-10100156-99	STATE	0000010330	O	MULTI FUNDED AMENDMENT		06/01/2010	06/30/2010	SURIMAD	N	231470.670	Y	2010
3	STATE	427-93-10100159-99	STATE	0000013992	O	MULTI FUNDED AMENDMENT		06/01/2010	06/30/2010	SURIMAD	N	26870.000	Y	2010

# How do I set an agreement code?

- Using agreement codes on contracts

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

SetID: STATE \*Status:

Contract ID: 42700-401-0000005671

Administrator:  Shataquia C. Gam...

Authoring Document

Authoring Status: Draft Version: 1.02 [Maintain Document](#)

Header

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

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

\*Vendor ID:  TALX CORPORATION [Primary Contact Info](#) [Thresholds & Notifications](#)

\*Begin Date:  [Contract Agreement](#)

Expire Date:  [Amount Summary](#)

Currency:

Maximum Amount:	<input type="text" value="15,754.00"/>	USD
		0.00
		0.00
		0.00
Remaining Amount:		15,754.00
Remaining Percent:		100.00

Primary Contact:

Vendor Contract Ref:

Description:

Master Contract ID:

Tax Exempt  Fiscal Year:

Order Contract Options

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

Temporarily set to Open

Select Contract Agreement



# How do I set an agreement code?

## Contract Header Agreement Assignments

SetID: STATE Contract Status: Open  
 Contract ID: 42700-401-0000005671 Expire Date: 09/30/2010  
 Description: ARRA FUNDS 2010 Begin Date: 06/01/2010

**Agreements** Find | View All First 1 of 1 Last

\*Sequence: 10 Compliance Status: Not Set

\*Agreement Code: SPD\_CP025  **Select the Agreement Code**

\*Agreement Description: SPD form CP025 - Contract Assessment Report

\*Result Type: None

Target Date: 08/31/2010  **Enter the target/due date**

Notification Comments: Please complete and attach a contract assessment report

Financial Implication:  **Select to set up notifications**

Include In Contract Document [Clause Assignments](#) [Workflow Assignments](#)

**Verification Steps** Customize | Find First 1 of 1 Last

**Assign who should upload the document**

*Step	Description	*Step Owner	*Verification Method	*Due/Start Notify Date	Activity Status
10	Contract Assessment Rep	Stacey Stith 404-657-81 	Attachment	08/31/2010 	No Start



# How do I set workflow notifications?

## Contract Entry

### Contract Header Workflow Assignments

SetID: STATE Contract Status: Open Begin Date: 06/01/2010  
 Contract ID: 42700-401-0000005671 Expire Date: 09/30/2010  
 Description: PD\_CP25  
 Agreement:   
 Agreement:

Add a row for who should upload the form and a row for who should be notified when it is done or if it is past due.

Set the days for notification.

Notification										
*Sequence	*Notification Type	Verify Step	User Type	Recipient Name	*Email Address	*Sequence	Notify On Status Change	Reminder Number Of Days Prior	Final Reminder Days	Passed Target
10	Verification Step	10	Internal	Stacey Stith 404-657-885	sstith@dhr.state.ga.us	10	<input type="checkbox"/>	10	5	<input checked="" type="checkbox"/>
20	Agreement		Internal	Annette Bazhaw 4.656.46	anbazhaw@dhr.state.ga.us	20	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>

OK Cancel



# How do I enter compliance comments?

- Menu
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
  - Create Contracts and Documents
  - Monitor and Update Agreements
    - Setup Agreements
    - Update Agreement Statuses
    - Update Procurement Info
    - Monitor Agreement Compliance
    - Review Agreement Statuses
  - Manage Contract Library
  - Supplier Contracts Setup
  - Search Content
  - Contract Release Processes
  - Related Links
- Items
- Vendors
- Purchasing
- eProcurement
- Services Procurement
- Sourcing
- Project Costing
- Accounts Receivable

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

## Update Agreement Statuses

**Search Criteria**

\*SetID:       Results to include:  Header Agreements Only  
 Line Agreements Only  
 Header and Line Agreements

\*Contract ID:

Contract Line:

Verification Step Owner:

Compliance Status:

Agreements Retrieved

SetID	Contract Agreement	and Code	Descr
1 STATE	<a href="#">42700-401-0000005671-HEADER</a>	<a href="#">10-SPD_CP025</a>	SPD fo Asses

Click on the code to update

SetID: STATE  
 Contract ID: 42700-401-0000005671  
 Vendor ID: 0000016965  
 Vendor Name: TALX CORPORATION

Contract Status: Approved

Begin Date: 06/01/2010  
 Expire Date: 09/30/2010

**Contract Agreements** Find | View All First 1 of 1 Last

Agreement Sequence: 10      \*Compliance Status:

Agreement Code: SPD\_CP025

Agreement Description: SPD form CP025 - Contract Assessment Report

Result Type: Text

Negotiated Result:       Actual Result:

Target Date: 08/31/2010

Notification Comments:

Compliance Comments:

Financial Implication:

Include In Contract Document

Enter comments that can be reported.

Click here

[Return to Contract Status Search](#)



# How do I verify the steps?

## Contract Verification Details

SetID: STATE Contract Status: Approved  
 Contract ID: 42700-401-0000005671 Begin Date: 06/01/2010  
 Vendor ID: 0000016965 Expire Date: 09/30/2010  
 Vendor Name: TALX CORPORATION  
 Agreement Code: SPD\_CP025 Agreement Sequence: 10  
 Agreement Description: SPD form CP025 - Contract Assessment Report

## Verification Steps

Verification Step: 10  
 Description: Contract Ass  
 Due Date: 08/31/2010  
 \*Activity Status: **Completed**  
 Notification Comments: Please complete and attach a contract assessment rep

Set the status to Completed

### Upload another File

Attachment Sequence	File Name	Attachment Description
1	SPD-CP025_XXXX-XXX-XXXXXXXXXXXX-XXXX.doc	2010 Contract Assessment R

Upload the report

OK Cancel

SetID: STATE Contract Status: Approved  
 Contract ID: 42700-401-0000005671 Begin Date: 06/01/2010  
 Vendor ID: 0000016965 Expire Date: 09/30/2010  
 Vendor Name: TALX CORPORATION

Maintain Document

## Contract Agreements

Agreement Sequence: 10 \*Compliance Status: **Compliant**  
 Agreement Code: SPD\_CP025  
 Agreement Description: SPD form CP025 - Contra  
 Result Type: Text

Set Status to Compliant after all steps are completed.

Negotiated Result:   
 \*Actual Result: 2010 Contract Assessment attached

Enter Actual Results

Target Date: 08/31/2010  
 Notification Comments: Please complete and attach a contract assessment report  
 Compliance Comments: Enter compliance comments here.  
 Financial Implication:

Document [Contract Step Verification](#)  
 Ret [is Search](#)

Click Save



# How do I view all agreement codes and status?

– Run query OSC007\_AGREEMENT\_STATUS

Buy Agree ID:

Records Query Expressions Prompts Fields Criteria Having View SQL **Run**

Buy Agree ID = 467%

[View All](#) | [Rerun Query](#) | [Download to Excel](#)

First ◀ 1-9 of 9 ▶ Last

	Buy Agree ID	Status	Vendor	Descr	Buyer	Agreement Code	Descript	Status	Target Date
1	46700-375-0000002166	O	0000000126	fsdklafjsdklj	BISHOM01	CO_INFORMATION	COMPANY INFORMATION	Not Set	12/01/2010
2	46700-274-0000003782	A	0000069998	274/Clayton TC Fire Sys Inspec	ROGERG00	CO_INFORMATION	COMPANY INFORMATION - Certificate of Insurance	Not Set	06/30/2010
3	46700-274-0000003782	A	0000069998	274/Clayton TC Fire Sys Inspec	ROGERG00	QUANTITY	Provide testing/inspection results for each time of service	Not Set	12/29/2009
4	46700-262-0000011252-1	A	0000146773	262 Grease Trap Maintenance	BALLL00	CO_INFORMATION	COMPANY INFORMATION - Certificate of Insurance	Not Set	06/30/2010
5	46700-203-	A	000005400	203 Boiler Chemical Feed	EVANSC00	CO_INFORMATION	COMPANY INFORMATION -	Not	06/30/2010



# How do I make my contract viewable to other Contract Administrators?

- Menu
- ▷ My Favorites
- ▷ Optim PE Archiving
- ▷ SRM Custom
- ▷ News and Announcements
- ▷ SAO Technical
- ▷ Employee Self-Service
- ▷ Manager Self-Service
- ▽ Supplier Contracts
  - ▷ Create Contracts and Documents
    - [Contract Entry](#)
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  - ▷ Related Links
- ▷ Items
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- ▷ Purchasing

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

## 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"/>						<input type="button" value="+"/> <input type="button" value="-"/>

Enter this role so all contract admins can view your contracts

Role Level View Access		First	1 of 1	Last
Role Name	Description			
GA_SC_CONTRACT_MANAGEMENT	GA_SC_CONTRACT_MANAGEMENT			<input type="button" value="+"/> <input type="button" value="-"/>

# How do I import contract documents?

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

SetID: STATE \*Status:

Contract ID: 46700-490-000007775A

Administrator:   Bonita J Jackson 404-656-6132

▼ Header

Process Option: Purchase Order [Edit Comments](#) [Activity Log](#)

Vendor: SCARBOR&SO-001 [Contract Activities](#) [Document Status](#)

Vendor ID: 0000010751 SCARBOR AND SONS [Primary Contact Info](#) [Thresholds & Notifications](#)

[Contract Agreement](#)

## Create Document

Source: Purchasing Contracts [Document Search](#)

SetID: STATE 46700-490-000008131

Vendor ID: 0000438813 CKT FARM

\*Document Type:  **Select the template used**

Configurator ID:

\*Description:  **Enter contract description**

\*Administrator:  Bonita J Jackson 404-656-6132

Sponsor:

Department:

**Click Import**

[External Contacts List](#) [Document View Access](#)

# How do I import contract documents?

Document Type:

Sponsor:

\*Administrator:  Kyle M. Morton 404-463-4066

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.)

**Current Version**

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Original Contract		<input type="text" value="1.00"/>		Executed	<input type="text" value="07/01/2009"/>		<input type="button" value="Upload"/>	<input type="button" value="Clear"/>
Amendment File		<input type="text" value="1.00"/>	<input type="text" value="1"/>	<input type="text" value="Draft"/>	<input type="text" value="07/01/2010"/>		<input type="button" value="Upload"/>	<input type="button" value="Clear"/>

To specify Prior Versions enter an Amendment number greater than 1

Choose an Import Option based on the state of the contract.

Complete the version and status.

Upload the documents



# How do I import contract documents?

Document Type:

Sponsor:

\*Administrator:  Kyle M. Morton 404-463-4066

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 of date and amendment summary file.)

**Current Version**

Type	File Name	Version	Amendment	Status	Start Date	Status Time	Upload	Clear
Original Contract	<a href="#">XXXXX-XXX-XXXXXXXXX.pdf</a>	<input type="text" value="1.00"/>		Executed	<input type="text" value="07/01/2009"/>	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="Clear"/>
Amendment File	<a href="#">XXXXX-XXX-XXXXXXXXXX-2011_RENEWAL.pdf</a>	<input type="text" value="1.00"/>	<input type="text" value="1"/>	<input type="text" value="Draft"/>	<input type="text" value="07/01/2010"/>	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="Clear"/>

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

Choose the Import Option based on the contract status.

Documents should include the contract number.

Enter the version, status and dates.



# How do I import contract documents?

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

## Document Management

[Return to Document Search](#)

SetID: STATE Contract ID: [46700-490-0000006886](#)  
 Vendor ID: 0000009776 SOUTHERN STATES  
 Document Type: GDC Service and Maint Contract  
 Description: From RFQ ID 0000006886  
 Administrator: Kyle M. Morton 404-463-4066  
 Sponsor: Department:

If imported as draft, approve and execute.

Add additional documents here. ex: Insurance letters

Amendment: 1 Created On: 07/01/10 12:00AM [Add Attachments/Related Documents](#)  
 Version: 1.00 Last Modified On: 07/07/10 8:02AM [External Contacts List](#)  
 Status: Draft [Document View Access](#)

Send to Contacts

### 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
- Bypass Approvals

#### Other Document Actions:

- Recreate Document
- Import Prior Document
- Deactivate Document

# How do I find a contract where there is no document?

- Run query:  
OSC008\_CNTRCT\_NO\_DOC\_NOR\_EXECT

Contract like:  [View Results](#)

	A	B	C	D	E	F	G	H
1	CONTRACT N	14						
2	SetID	Contract	Vendor	Status	Descr	Begin Dt	Expire Dt	
3	STATE	46100-324-DJJ0000081-0001	0000010567	A	SPEEDQUEEN WASHER & DRYER	6/29/2010	6/29/2011	
4	STATE	46100-324-DJJ0000044-0001	0000036625	A	Washing Machines & Tublers-a	10/21/2009	10/21/2010	
5	STATE	46100-324-DJJ0000032-0001	0000430473	A	Resident Monitoring Device	10/22/2009	10/22/2010	
6	STATE	46100-049-DJJ0000065-0001	0000001367	A	SUMTER YDC FY10 2ND QTR FOOD B	11/17/2009		
7	STATE	46100-049-DJJ0000047-0001	0000403433	A	SNACK & HYGIENE	10/7/2009	10/7/2010	
8	STATE	46100-049-DJJ0000046-0001	0000009778	A	SUMTER YDC FY10 2ND QTR FOOD B	10/6/2009	10/6/2010	
9	STATE	46100-011-DJJ0000099-0001	0000009778	A	SANDERSVILLE RYDC FOOD BID 042	4/19/2010	4/16/2011	
10	STATE	46100-011-DJJ0000084-0001	0000009778	A	SANDERSVILLE RYDC FOOD BID 022	2/8/2010	2/8/2011	
11	STATE	46100-011-DJJ0000073-0001	0000009778	A	Sandersville RYDC Food Bid 012	12/18/2009	12/18/2010	

# How do I link POs to contracts?

## Maintain Purchase Order

### Purchase Order

Unit: 46100  
 PO ID: 0000116286  
 Copy From:

PO Status: Dispatched ▲ ✖  
 Budget Status: Valid  
 Hold From Further Processing

▼ Header

\*PO Date: 05/05/2010 31 Vendor Search  
 Vendor: GLOVERWHOL-00 [Vendor Details](#)  
 \*Vendor ID: 0000009778 GLOVER WHOLESALE COMPANY  
 \*Buyer: DAKING Deborah King 706-565-4396  
 PO Reference: AC-DJJ 91 Glover SM FOOD

Doc Tol Status: Valid  
 Backorder Status: None [Create BackOrder](#)  
 Receipt Status: Partial  
 \*Dispatch Method: Print

[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	

Link the PO line to the contract

If open item reference on contract is unchecked, link to contract line.



# How do I locate AC and SWC PO's not linked to contracts?

- Run query: OSC009\_PO\_NO\_CONTRACT

Unit:

Acctg Date >:

Records Query Expressions Prompts Fields Criteria Having View SQL **Run**

**Unit = 42000,Acctg Date >=2010-06-30**

[View All](#) | [Rerun Query](#) | [Download to Excel](#) First 1-17 of 17 Last

	Unit	PO No.	Type	Status	Vendor	Buyer	Origin	Acctg Date	Contract	Event ID
1	42000	0000052249	AC	D	0000016651	REYNOLDS	090	07/06/2010		
2	42000	0000052258	CON	O	0000004794	SHUDSON	210	07/07/2010		
3	42000	0000052259	CON	O	0000004794	SHUDSON	210	07/07/2010		
4	42000	0000052260	CON	O	0000004794	SHUDSON	210	07/07/2010		
5	42000	0000052261	CON	O	0000004794	SHUDSON	210	07/07/2010		



# Questions?

If you have more questions after this presentation, please contact

DOAS Help Desk

404-657-6000