

Department of Administrative Services
Lead. Empower. Collaborate.

Supplier Contracts Management Virtual

State Purchasing Division

January 2026



Your Presenter

Retiring!



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- Title: Senior Procurement Training Manager
- Accomplishments: Over 20 years' experience as a facilitator, presenter, and trainer. Life-coach to couples (specifically blended families). Buyer with various agencies.
- Education: B.S. in Management from Shorter University, MBA with concentration in Human Resource Management from Strayer University
- Certifications: CPPB, GCPM, CVIOG – Budget & Financial Mgmt. & Primary Accounting



June 12th is the last day to access the LMS.



Complete all courses and tests.



Courses not completed by this date will require reenrollment in the new LMS.



Welcome to Virtual Learning

Before we begin, let's review the rules to follow for this training class:



- Stay muted if you aren't speaking
- Raise Hand Feature in GoToTraining
- Put Question(s) Box in Chat Box
 - Will be reviewed and answer periodically by instructor
- Course Structure
 - Introduction of Concepts
 - Demonstration of Concepts



Agenda

- **Day One**

- Troubleshooting - 8:45 am – 9:00 am
- Content Delivery – 9:00 am -10:30 am
- Break 10:30 am – 10:45 am
- Content Delivery 10:45 am - Noon
- Lunch Noon – 1:00 pm
- Content Delivery 1:00 pm – 2:30 pm
- Break - 2:30 pm – 2:45 pm
- Content Delivery 2:45 pm – 4:00 pm
- Test Availability



Topics of Discussion

- Create a State Entity Contract from a requisition, sourcing event, and an existing contract
- Import contract documents
- Add attachment to contract files
- Enter comments to explain actions taken
- Create contract amendments
- Renew, extend, and cancel a contract
- Close an expired contract
- Agreement codes
- Contract template

Supplier Contracts Management Exam

Required?	Yes
Graded?	Yes
Questions	20 questions
Scoring	5 points per question
Passing	80 points or greater or 80% or greater
Open Book?	Yes
Proctored?	No
Deadline?	All three attempts at test must be completed within ten days from last day of class.

Supplier Contracts Management Benefits

The benefits of using Supplier Contracts Management includes:

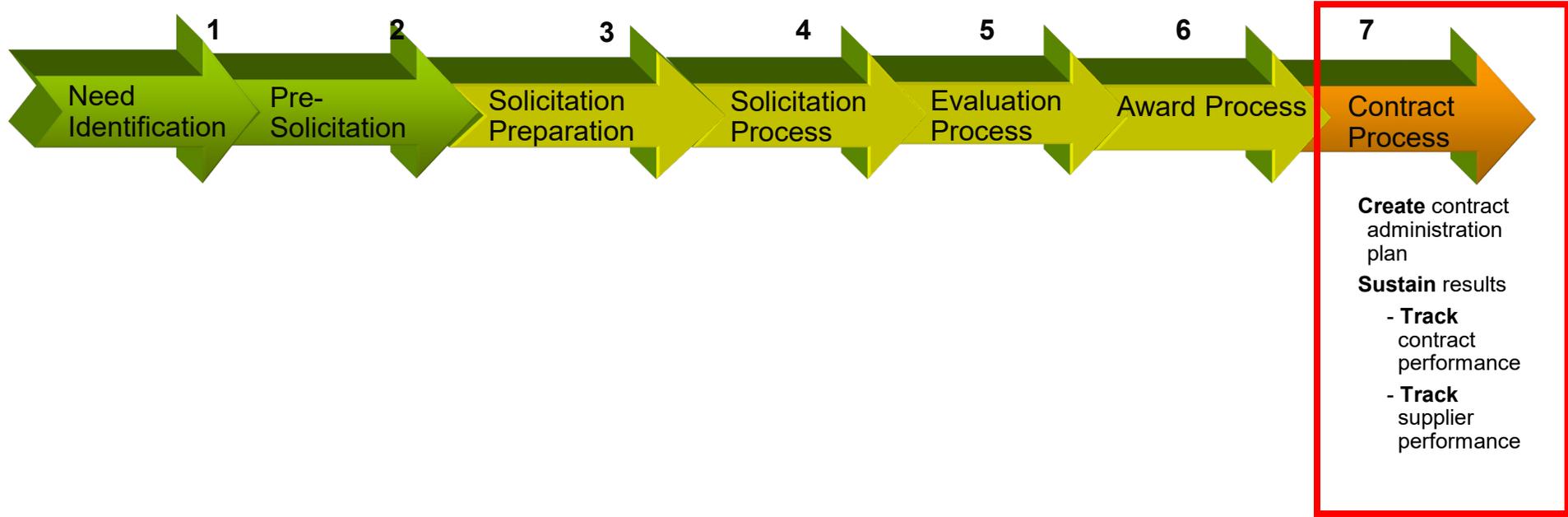
- Integrates with Microsoft Word™
- Standardizes contract processes
- Reduces exposure and risk
- Systematically monitors contract compliance



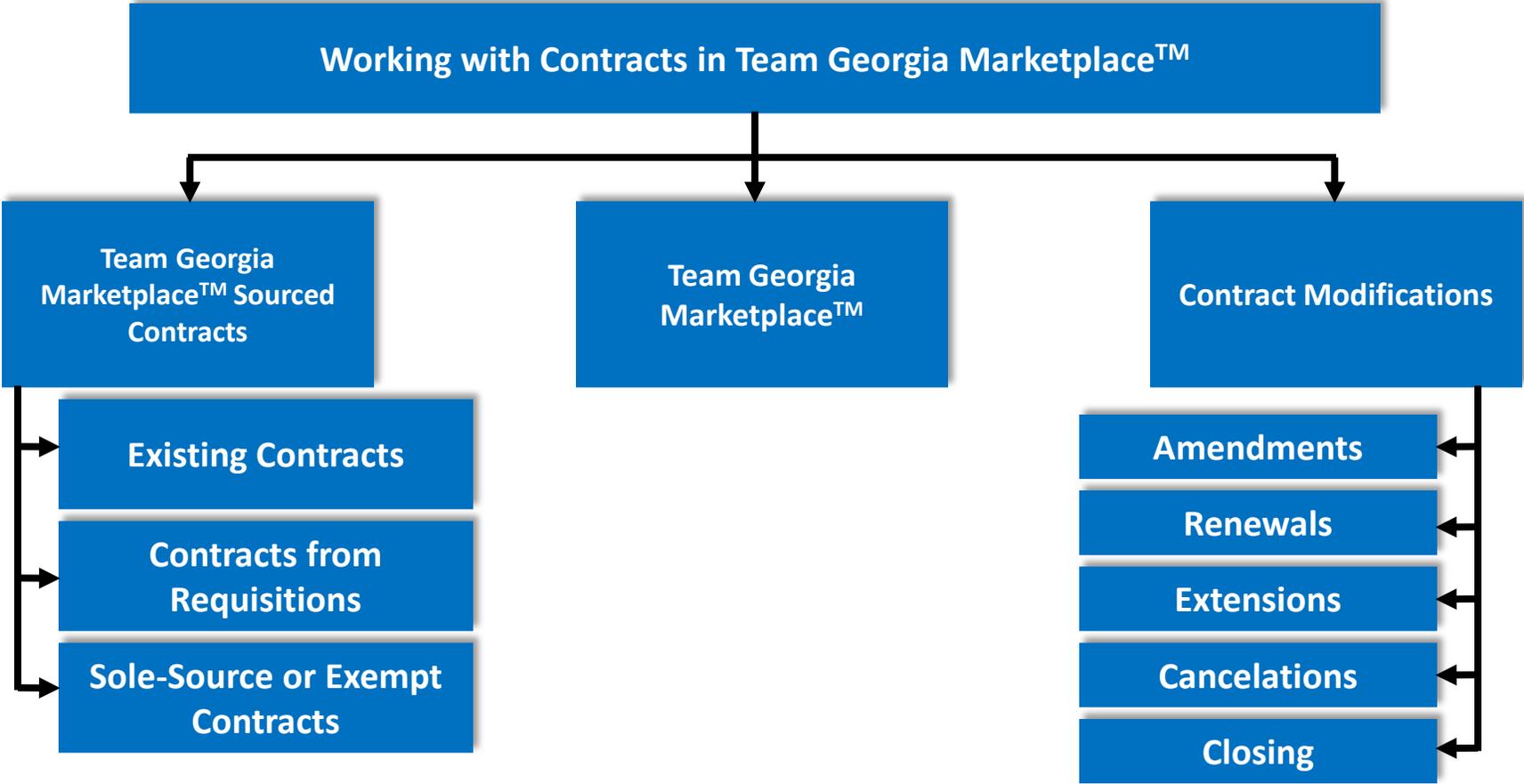
The 7 Stages of Procurement



The following represents the 7 Stages of Strategic Sourcing



Supplier Contracts





Supplier Contracts Management Team Georgia Marketplace™ Roles



Role	Description
(Contract) Administrator	Employee who can create, monitor, update, amend documents and control life cycles of the document (for some state entities, this is the Buyer, other state entities may separate these functions)
Buyer	Employee who creates the Purchase Orders, Sourcing Events, and orders the Item/Service once the requisition is approved
Supplier	Business or individual who is awarded the contract and provides the goods or services

Supplier Contracts Management

Team Georgia Marketplace™ Definitions



Term	Definition
Begin Date	Date the state entity can start to purchase off the contract
Expire Date	Date the initial contract period ends, the renewal period ends or the extended period ends—not the entire potential life of the contract
Maximum Amount	The potential estimated maximum amount to spend on the contract for the initial period or the renewal periods
Closed Contract	Expired Contract or contract not eligible for renewal or extension
Thresholds and Notifications	Optional functions that send alerts when a contract is about to expire and/or when a contract reaches the maximum amount

Supplier Contracts Management

Team Georgia Marketplace™ Definitions



Term	Definition
Renewed Contract	Multi-year contract that has completed the initial term and is being continued
Extended Contract	Used after all renewals have been exhausted or when a new contract is being considered; for the time period until a new contract can be awarded
Cancelled Contract	Cancelled for convenience, default or as the result of a protest, or if the contract was created in error. Must include a comment with an explanation and documentation
Amendment	Any modification to an executed contract, including renewals and extensions; excluding cancelling or closing
Approved Status	System requirement for state entities to process a Contract Release for a Purchase Order



Enterprise Learning



Department of Administrative Services
Improving efficiency, compliance and workforce performance

Lesson One: Team Georgia Marketplace™ Sourced Contracts

Lesson Objectives

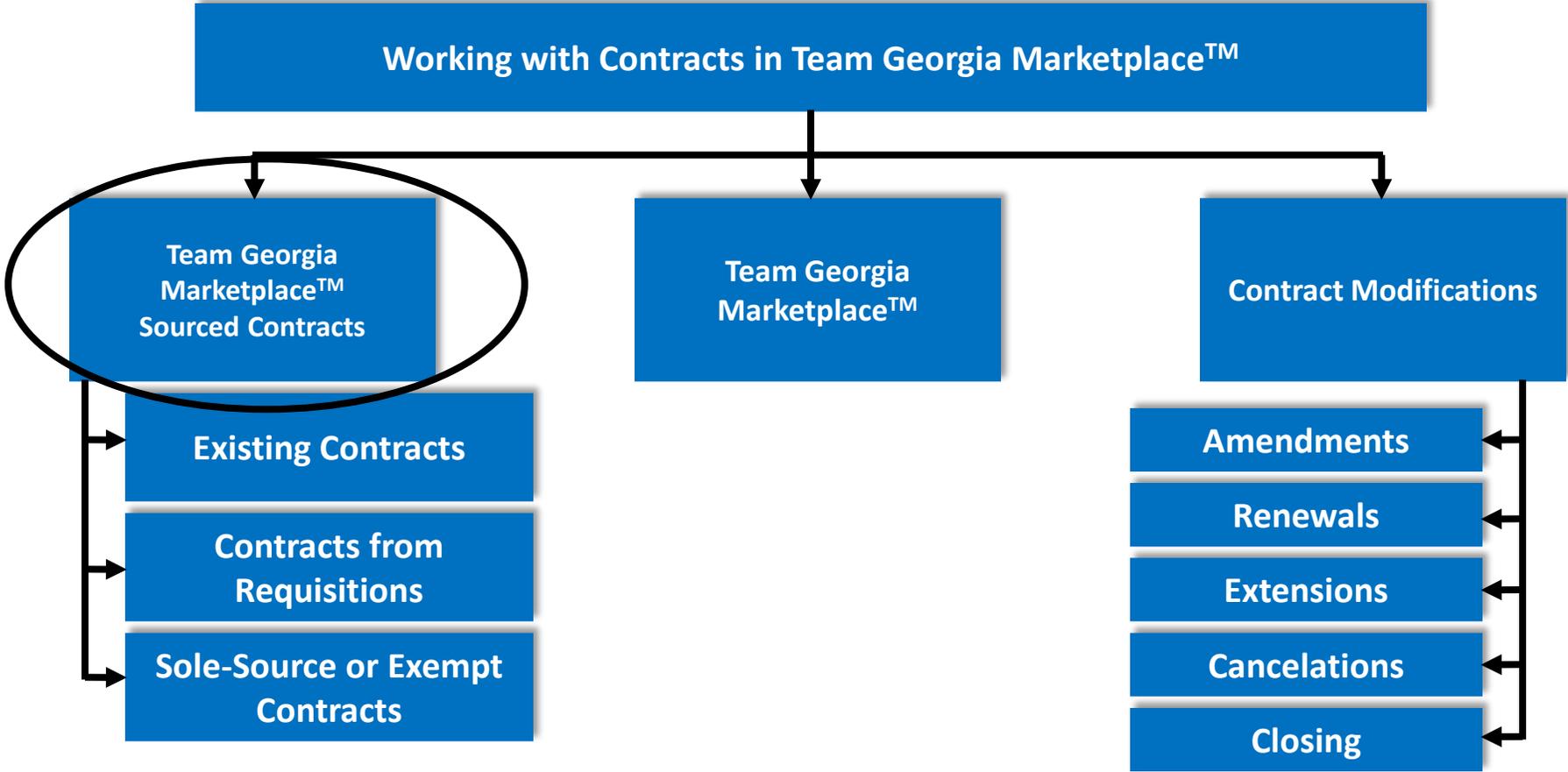


By completing this lesson you will:



- Create different types of contracts from situations where they have not been sourced using the Sourcing module
- Enter Header information
- Enter Line information
- Import the Microsoft Word document
- Attach critical documents to the contract

Supplier Contracts



Lesson 1: Team Georgia Marketplace™ – Login

Log into the Training Database

<https://tgmptrn.teamworks.georgia.gov/psp/empltrn/?cmd=login&languageCd=ENG&>

The screenshot shows the login interface for the Financial Systems (FS92TRN) application. At the top left is the State of Georgia seal. The main header reads "Financial Systems" in a blue serif font, with "PeopleSoft FSCM" in a smaller font to the right. Below the header, the application identifier "FS92TRN" is displayed. The login form is enclosed in a red rectangular box and contains two input fields: "User ID" with the value "PSMITH01" and "Password" with masked characters. A green "Sign In" button is positioned below the password field. At the bottom of the page, there is a checkbox labeled "Enable Accessibility Mode".

Lesson 1 – Exercise 1.1

Creating Contract from Existing Exempt Contract

The screenshot displays the TeamWorks Procurement WorkCenter interface. The main dashboard features four tiles: 'News and Announcements' with a 'latest news' icon, 'Procurement' (highlighted with a red border) with a shopping cart icon, 'Approvals' with a document and checkmark icon, and 'Purchase Orders' with a shopping cart and document icon. A 'My Favorites' tile with a star icon is also present. A 'Home' dropdown menu is visible at the top. On the right, a 'Procurement WorkCenter' sidebar is open, showing a 'Links' section with a red border around the 'Supplier Contracts' category. The 'Supplier Contracts' category is expanded, revealing the following options:

- Analyze Events
- Notice of Intent to Award
- Award Events
- Supplier Contracts** (highlighted with a red border)
 - Contract Entry** (highlighted with a red border)
 - Document Management
 - Update Agreement Statuses

Lesson 1 – Exercise 1.0

Creating a Contract From an Existing Exempt Contract



Contract IDs of contracts not sourced in Team Georgia Marketplace™ are entered in the same manner.

Contract Entry

Find an Existing Value | **Add a New Value**

SetID STATE

Contract ID 42700-023-12121-0001

Style ID AGENCYSRVC

Contract Process Option General Contract

Add

Find an Existing Value | Add a New Value

Always leave
SetID as State!!

Use this method when creating a contract from any non-Team Georgia Marketplace™ Sourced situations:

Here the Contract ID is 42700-023-12121-0001. 12121 is the contract ID number (for demonstration only)

Lesson 1 – Exercise 1.1

Creating Contract from Existing Exempt Contract

Scroll down the page to select **AGENYSRVC (Agency Services)**

Look Up Style ID

Style ID

Contract Style

Structure Code

Style Description

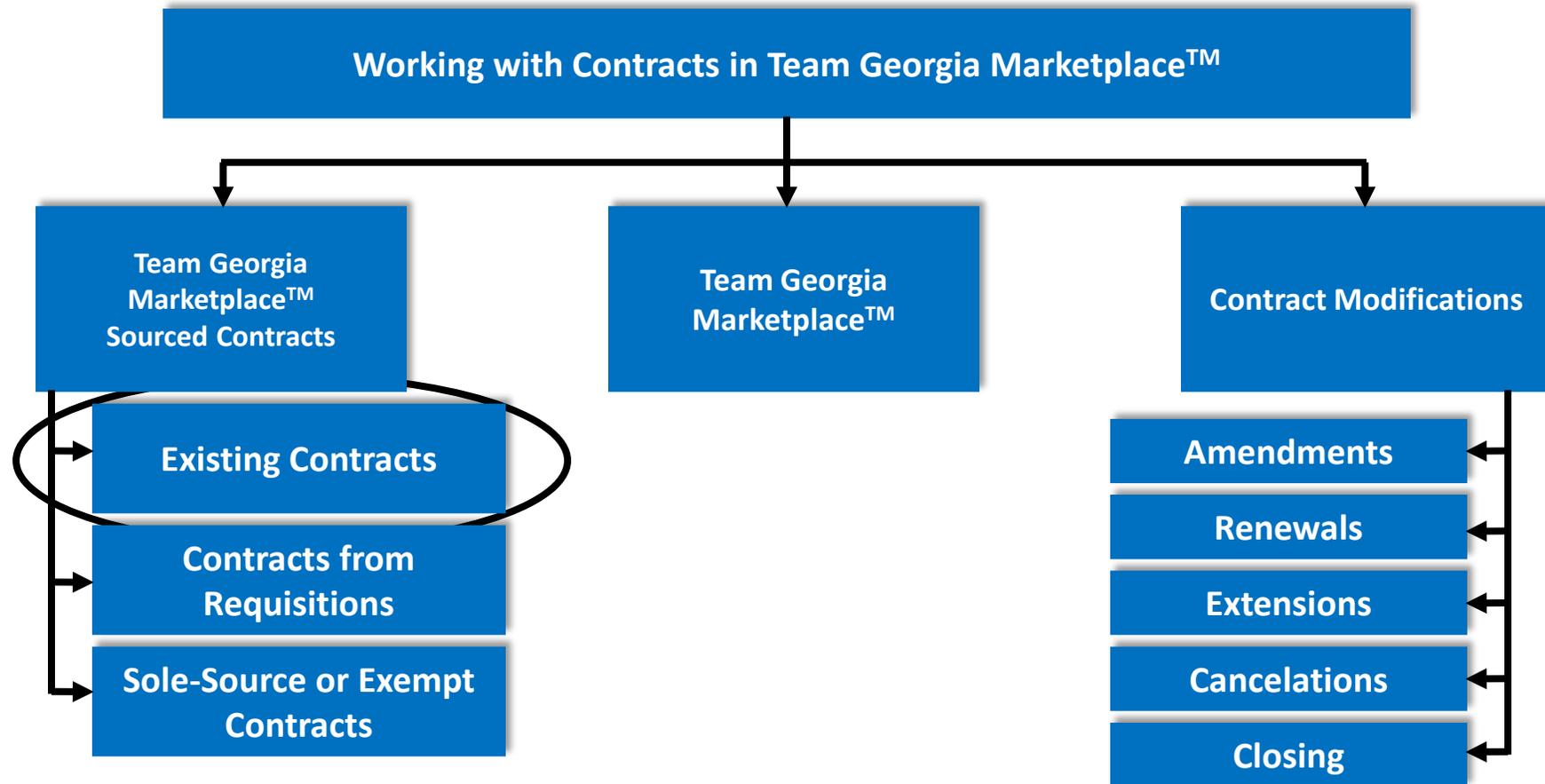
Contract Process Option

Basic Lookup

Style ID	Contract Style	Structure Code	Style Description	Contract Process Option
AGENCYGOOD	Agency - Goods	GN	Agency contract for goods	General
AGENYSRVC	Agency - Services	GN	Agency contract for services	General
AP	AP	AP	AP	Voucher
DST	Distributor	DST	Distributor	Dist
GENERAL	GENERAL	GN	GENERAL	General
GN	GENERAL_CNTRCT	GN	GENERAL	General
MFG	Manufacturer	MFG	Manufacturer	Mfg
PO	PO	PO	PO	Order
SWCGOODS	SWC - Goods	GN	Statewide Contract for Goods	General
SWCSERVICE	SWC - Service	GN	Statewide Contract - Services	General

Lesson 1 – Exercise 1.1

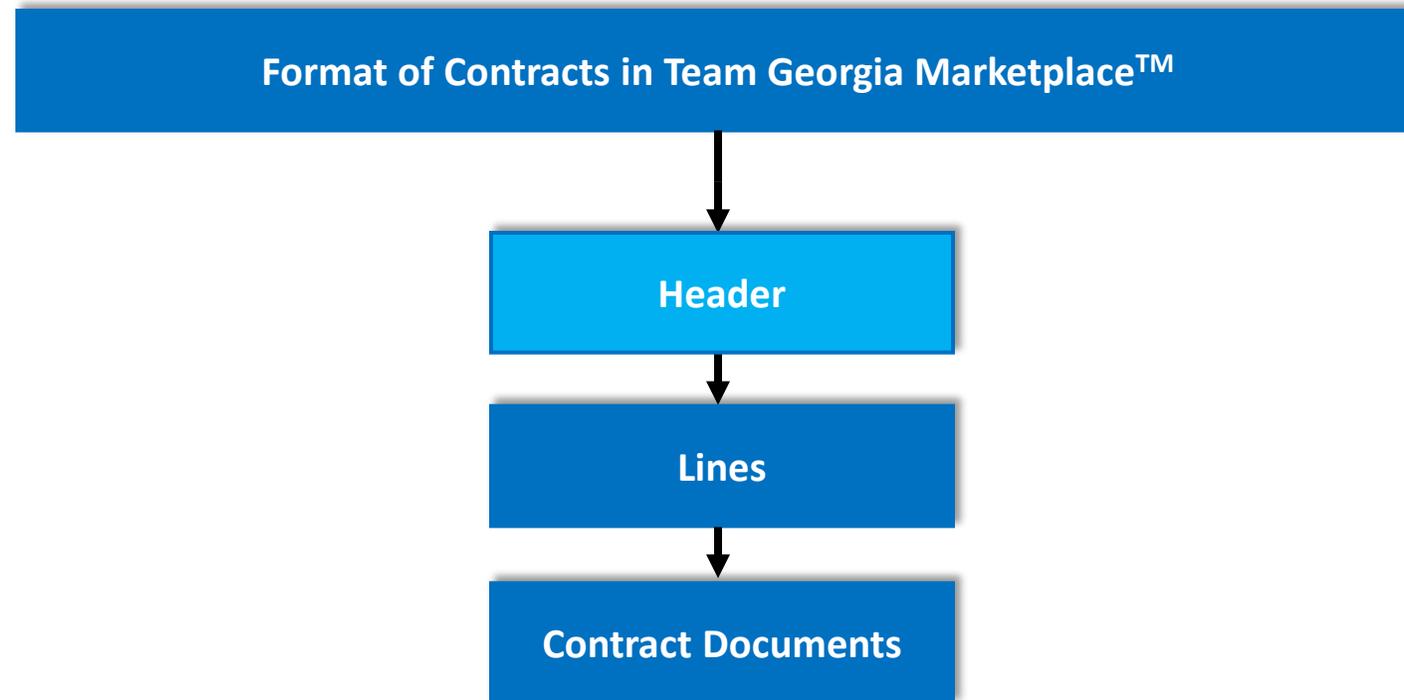
Creating Contract from Existing Exempt Contract





Existing Contracts

Scenario: Contract Administrator Pete Smith needs to import an Unarmed Security Services supplier contract that was recently executed and initiated. This contract was awarded earlier this year. Pete uses the naming convention of: Business unit-Origin- RequisitionID-0001 and then completes the Header.



Lesson 1 – Exercise 1.0

Creating a Contract From an Existing Exempt Contract



The sections of the Contract on the first screen are the Header and Lines.

The screenshot displays the 'Contract Entry' interface. At the top, it shows 'Contract ID: 42150223-121-001' and 'Contract Version: 1'. The 'Header' section includes fields for 'Contract Style' (Agency - Services), 'Supplier', 'Supplier ID', 'Primary Contract', 'Supplier Contract ID', 'Description', 'Master Contract ID', 'Begin Date' (09/06/2022), 'End Date', 'Renewal Date', 'Control type', 'Invoice Options', 'Amount Summary', and 'Contract Open Item Reference'. The 'Lines' section is visible at the bottom, showing a table with columns for Line, Item, Description, UOM, Category, Merchandise Amt, and Status. The table contains one line item with Line 1.

Approval Due Date is Optional. It is helpful primarily if the collaboration feature is used by the agency.

Contract Header

Lines

Lesson 1 – Exercise 1.0

Creating a Contract From an Existing Exempt Contract

You may need to click on the chevron next to the Header to open the field(s).

This screenshot shows the 'Contract Entry' interface. At the top, there are fields for 'SetID STATE Copy From Contract', 'Contract ID 42700-023-10404-0001', 'Contract Version' (Version 1), and 'Status Current'. Below these are fields for '*Status Open', 'Approval Due Date', and 'Administrator/Buyer'. A red box highlights the 'Header' field with a chevron icon. Below the header are sections for 'Catalog Search', 'Item Search', and 'Search for Contract Lines'. There are also 'Contract Categories' and 'Lines' sections with various search and filter options. At the bottom, there are 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display' buttons.

This screenshot shows the 'Contract Entry' interface with the 'Header' field expanded. The expanded header shows various fields including 'Contract Style Agency - Services', 'Buyer', 'Process Option General Contract', '*Supplier', '*Supplier ID', '*Begin Date 07/17/2018', 'Expire Date', 'Renewal Date', 'Currency USD CRRNT', 'Primary Contact', 'Supplier Contract Ref', 'Description', 'Master Contract ID', 'Tax Exempt ID', and 'Fiscal Year'. There are also 'Order Contract Options' and 'Voucher Contract Options' sections. The 'Amount Summary' section shows 'Maximum Amount 0.00 USD', 'Line Item Released Amount 0.00', 'Category Released Amount 0.00', 'Open Item Released Amount 0.00', and 'Total Released Amount 0.00'. At the bottom, there are 'Invoice Number', 'AP Business Unit', 'Accounting Template', '*Payment Terms ID', 'Gross Amount 0.00 USD', 'Freight Amount 0.00', 'Sales Tax Amount 0.00', and 'VAT Amount 0.00'.

Lesson 1 – Exercise 1.0

Creating a Contract From an Existing Exempt Contract



Contract Entry

Contract

SWID STATE Copy From Contract Contract Version

Contract ID 42704923-12121-0001 Version 1 Status Current

Admin Buyer

Header

*Contract Style Agency - Services

*Process Option General Contract

*Supplier Supplier Search

*Supplier ID

*Primary Contract

Supplier Contract Ref

Description

Master Contract ID

*Begin Date 09/09/2022

Expire Date

Renewal Date

Control type

Tax Exempt Tax Exempt ID

Auto Default Fiscal Year

Lock Charitable

Invoice Options

Invoice Number

All Business Unit

Accounting Template

Payment Terms ID

Block Date Type

Maximum Amount 0.00 USD

Line

Category Released Amount	Open Item Released Amount	Total Released Amount
0.00	0.00	0.00

Contract Open Item Reference

Allow Open Item Reference

Adjust Supplier Pricing Print

Price Can Be Changed on Order

Add Open Item Price Adjustments

Add Comments

Contract Activity

Primary Contract Info

Contract Header Agreement

Contract Release

Refer to

Activity Log

Document Status

Thresholds & Notifications

Price Adjustment Template

Purchase Order BU Defaults

Corporate Contract

Currency USD

Rate Date 09/09/2022

Must Use Contract Rate Date

Allow Multicurrency PO

Multi-Agreement

Initial Period

Non-Profit

Group Amount 0.00 USD

Freight Amount 0.00

Misc Charge Amount 0.00 Miscellaneous Charge

Sales Tax Amount 0.00

VAT Amount 0.00

Add a Document

Header Information

Enter the following:

- * Administrator
- * Payment terms
- * Supplier
- * Begin Date
- * Expire Date
- * Renewal Date - Optional
- * Description
- * Tax Exempt box
- * Tax exempt number
- * Fiscal Year
- * Maximum amount

NOTE: Corporate Contract would only be checked for SWC.

Lesson 1 – Exercise 1.0

Creating a Contract From an Existing Exempt Contract



Contract Entry

Contract

SWID STATE Copy From Contract Contract Version
Contract ID 42/05425-12121-0001 Version 1 Status Current
*Status Open Approval Use Date
Administration/Buyer Add a Document

Header

*Contract Style Agency - Services
Process Option General Contract
*Supplier Supplier Search
*Supplier ID Supplier Search
Primary Contract
Supplier Contract Ref
Description
Header Contract ID
*Begin Date 09/09/2022
*Expire Date
Renewal Date
Control type
 Not Exempt Not Exempt ID
 Auto Default Fiscal Year
 Lock Charterfields
Group
Type

Invoice Options

Invoice Number
AI* Business Unit
Accounting Template
Payment Terms ID
Share Date Type

Amount Summary

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

Contract Open Item Reference

Allow Open Item Reference
 Adjust Supplier Pricing Print
 Price Can Be Changed on Order
 Add Open Item Price Adjustments

PO Defaults MUST be validated

Initial Period indicates the first term of the contract.

Header

Uncheck:
Allow Multicurrency PO
Corporate Contract
Auto Default
Allow Open Item Reference
(optional if not including lines)

Review:
PO Defaults
Price Can be changed on Order

Lesson 1 – Exercise 1.0

Creating a Contract From an Existing Exempt Contract

Complete the top of the Header section—add comments if needed but do not add attachments.

Contract Entry

Contract

SetID STATE [Copy From Contract](#)

Contract ID 42700-023-12121-0001

*Status Open

Contract Version

Version 1 Status Current

Approval Due Date

Administrator/Buyer PSMITH01

PSMITH01

Header

*Contract Style Agency - Services

Process Option General Contract

*Supplier GASECURITY-003 [Supplier Search](#)

*Supplier ID 0000041257 [GEORGIA SECURITY SYSTEMS INC](#)

Primary Contact

[Add Comments](#)

[Contract Activities](#)

[Primary Contact Info](#)

[Contract Header Ag](#)

[Contract Releases](#)

[Add a Document](#)

Header

Contract Entry

Header Comments

SetID STATE Contract ID 42700-023-10404-0001 Version 1

*Sort Method Comment Time Stamp *Sort Sequence Ascending [Sort](#)

Comments [Find](#) | [View All](#) First 1 of 1 Last

Use Standard Comments [Inactivate](#)

Comment Status Active

Procedural steps

Send to Supplier Show at Receipt Copy to Purchase Order

Show at Voucher

Associated Document

Attachment [Attach](#) [View](#) [Delete](#) Email

From -> CNT STATE-42700-023-10404-0001

[OK](#) [Cancel](#) [Refresh](#)

Lesson 1 – Exercise 1.0

Creating a Contract From an Existing Exempt Contract

» New Window | Help | Personalize Page

Contract Entry

Contract

SetID	STATE	Copy From Contract	Contract Version	Version	1	Status	Current
Contract ID	42700-023-12121-0001			Approval Due Date	<input type="text"/>		
*Status	Open						
Administrator/Buyer	PSMITH01					<input type="button" value="Add a Document"/>	

PSMITH01

▼ **Header** ?

*Contract Style	Agency - Services						
Process Option	General Contract						
*Supplier	GASECURITY-003			Supplier Search			
*Supplier ID	0000041257			GEORGIA SECURITY SYSTEMS INC			
Primary Contact	<input type="text"/>						

[Edit Comments](#)

- [Contract Activities](#)
- [Primary Contact Info](#)
- [Contract Header Agreement](#)
- [Contract Releases](#)

Header

Lesson 1 – Exercise 1.1

Adding Requisition Lines

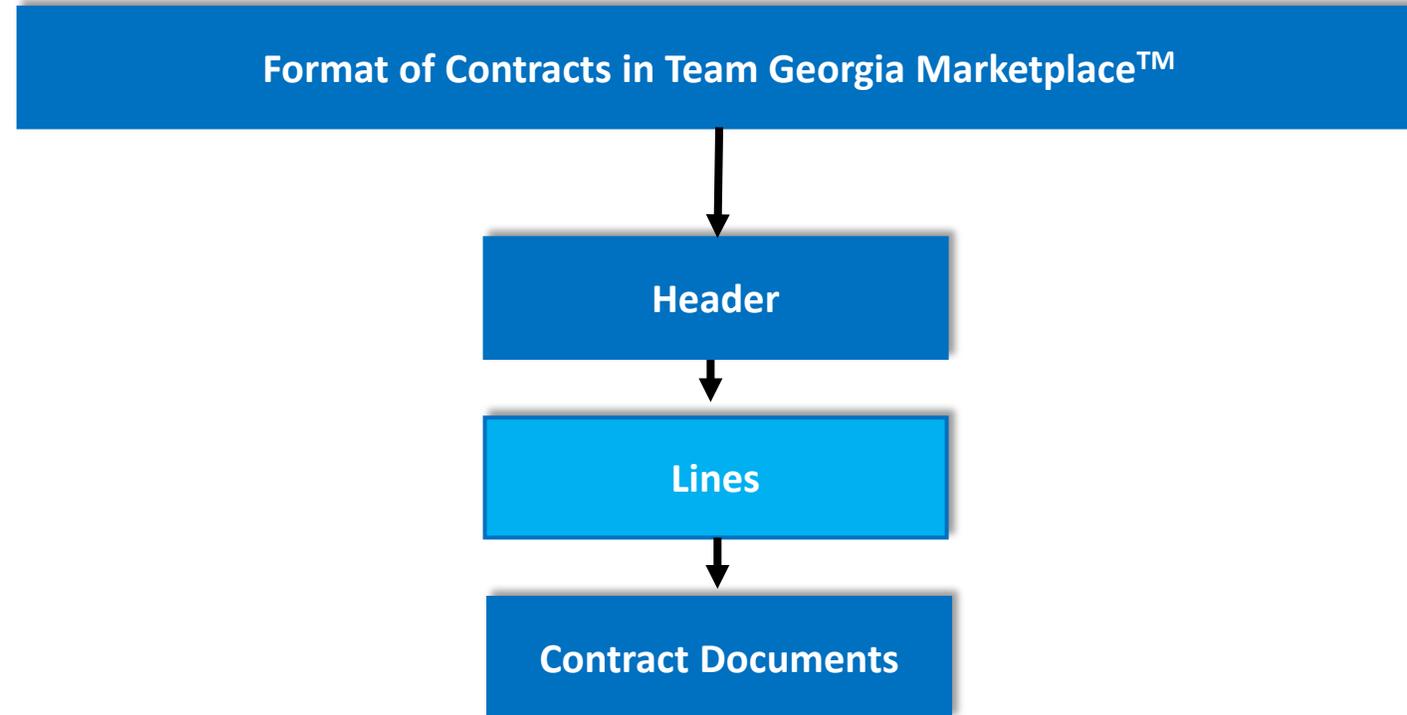


Existing Contracts

Scenario: Pete Smith has completed the Header for the Unarmed Security Services contract and now wants to enter the Line(s) information.

Lesson 1 – Exercise 1.1

Adding Requisition Lines



Lesson 1 – Exercise 1.1

Adding Requisition Lines

Enter the Line information

Lines

The screenshot displays the 'Lines' interface. At the top, there are tabs for 'Details', 'Order By Amount', 'Item Information', 'Default Schedule', 'Release Amounts', 'Release Quantities', 'Line Groupings', and 'Spend Threshold'. Below the tabs is a table with the following columns: Line, Item, Description, UOM, Category, Merchandise Amt, Include for Release, and Status. The first row of the table is highlighted with a red box. Below the table, there are links for 'View Category Hierarchy' and 'Category Search'. At the bottom of the interface, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', 'Update/Display', and 'Correct History'. A yellow callout box with a red border points to the 'Contract Categories' section, containing the text: 'We will not be using this section'.

Enter the Description

UOM—using the look-up if needed.

Category CD (NIGP Code)—using the look-up if needed.

Enter the full amount for the line.

Click the + to add more lines if needed.

Lesson 1 – Exercise 1.1

Adding Requisition Lines

Look up the NIGP Code if needed.

Look Up Category

SetID: STATE

Category: begins with []

Description: begins with [security]

Look Up Clear Cancel [Basic Lookup](#)

906--42	Harbors; Jetties; Piers; Ship Terminal Facilities, Architectural Services
906--44	Heating; Ventilating; Air Conditioning, Architectural Services
906--46	Highways; Streets; Airport Pay-Parking Lots, Architectural Services
906--48	Historical Preservation
906--50	Industrial Processes; Quality Control (Inactive, effective January 1, 2016)
906--52	Interior Design, Decorating, Space Planning, Exhibits and Displays
906--54	Irrigation; Drainage; Flood Control, Architectural Services
906--56	Landscape, Architectural Services
906--57	Land Development and Planning, Architectural Services
906--58	Lighting, Interior, Exterior, Architectural Services
906--60	Mining and Mineralogy, Architectural Services
906--61	Models of Layouts and Buildings to Scale, Architectural Services
906--62	Petroleum and Fuel, Storage and Distribution, Architectural Services
906--64	Planning, Urban, Community, Regional, Area wide, and State
906--66	Planning, Site, Installation and Project
906--68	Power Generation, Transmission, Distribution, Architectural Services
906--69	Correctional Facilities, Architectural Design Services
906--70	Railroad; Rapid Transit; Monorail, Architectural Services
906--72	Recreation Facilities, Parks, Marinas, etc., Architectural Services
906--74	Recycling Systems, Architectural Services
906--78	Security Systems: Intruder and Smoke Detection, Architectural Services
906--80	Sewage Collection, Treatment, and Disposal, Architectural Services

Lines

Double-click
and the NIGP
Code
populates

Lesson 1 – Exercise 1.1

Adding Requisition Lines

Contract Entry

Contract

SetID STATE

Contract ID 42700-023-12121-0001

*Status Open

Contract Version

Version 1

Status Current

Approval Due Date

Administrator/Buyer PSMITH01

PSMITH01

Header

*Contract Style Agency - Services

Process Option General Contract

*Supplier GASECURITY-003

*Supplier ID 0000041257

GEORGIA SECURITY SYSTEMS INC

Primary Contact

Supplier Contract Ref

Description Unarmed Security

Master Contract ID

*Begin Date 07/01/2022

Expire Date 06/30/2023

Renewal Date

Control Type Business Unit

Tax Exempt

Auto Default

Lock Chartfields

Tax Exempt ID STATE OF GEOR

Fiscal Year 2023

Group

Corporate Contract

Currency USD

Rate Date 06/06/2022

CRRNT

Must Use Contract Rate Date

Allow Multicurrency PO

Multi-Agreement

Edit Comments

Contract Activities

Primary Contact Info

Contract Header Agreement

Contract Releases

Retention

Activity Log

Document Status

Thresholds & Notifications

Price Adjustment Template

Purchase Order BU Defaults

Add a Document

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

Save information

Lesson 1 – Exercise 1.2

Importing an Existing Executed Contract

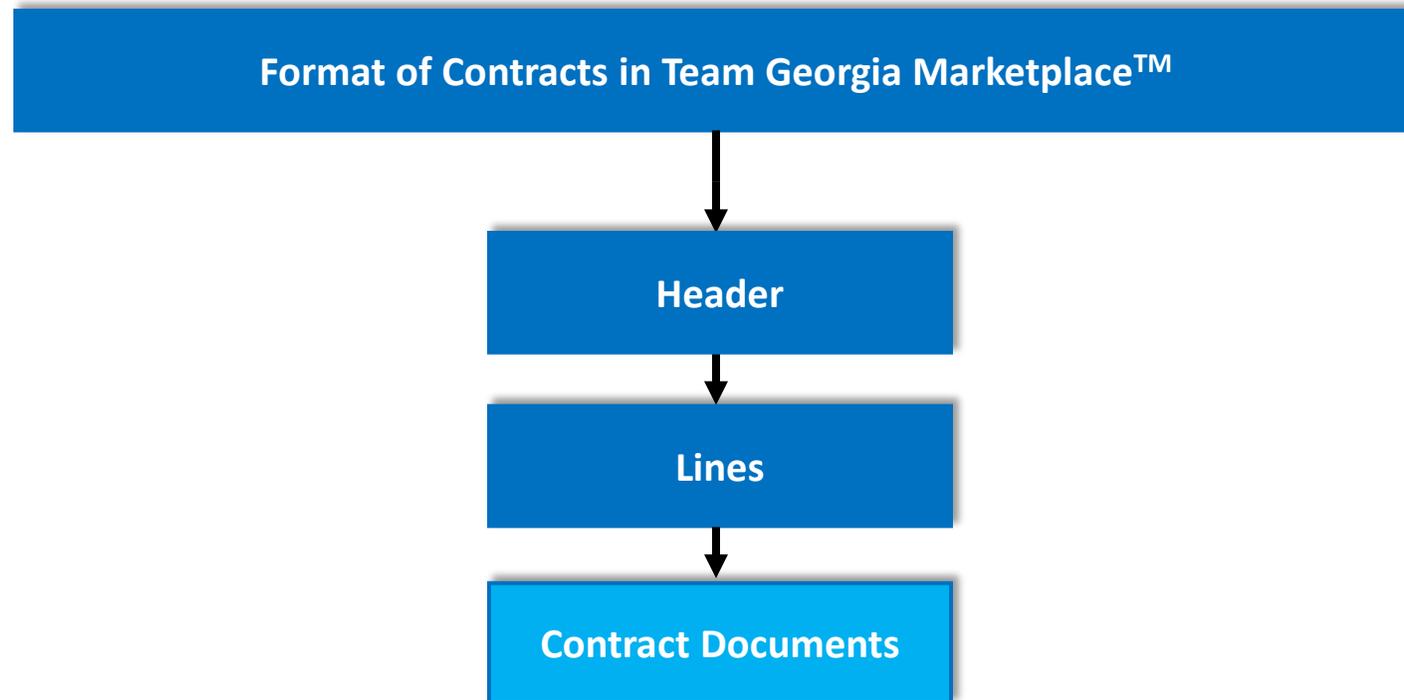


Existing Contracts

Scenario: Pete Smith has completed the Header and the Line information for the Unarmed Security Services contract. He now needs to import the existing executed and signed contract, and all relevant contract-specific documents.

Lesson 1 – Exercise 1.2

Importing an Existing Executed Contract



Lesson 1 – Exercise 1.2

Importing an Existing Executed Contract

Contract Entry

Contract

SetID STATE Contract Version Version 1 Status Current

Contract ID 42700-023-12121-0001

*Status Open Approval Due Date

Administrator/Buyer PSMITH01 PSMITH01

Header

*Contract Style Agency - Services

Process Option General Contract

*Supplier GASECURITY-003 Supplier Search

*Supplier ID 0000041257 GEORGIA SECURITY SYSTEMS INC

Primary Contact

Supplier Contract Ref

Description Unarmed Security

Master Contract ID

*Begin Date 07/01/2022

Expire Date 06/30/2023

Renewal Date

Control Type Business Unit

Tax Exempt Tax Exempt ID STATE OF GEOR

Auto Default

Lock Chartfields Fiscal Year 2023

Group

Corporate Contract

Currency USD

Rate Date 06/06/2022 CRRNT

Must Use Contract Rate Date

Allow Multicurrency PO

Multi-Agreement

[Add a Document](#)

[Edit Comments](#)

[Contract Activities](#)

[Primary Contact Info](#)

[Contract Header Agreement](#)

[Contract Releases](#)

[Retention](#)

[Activity Log](#)

[Document Status](#)

[Thresholds & Notifications](#)

[Price Adjustment Template](#)

[Purchase Order BU Defaults](#)

Contract Documents

The Add a Document Button is now available.

You are ready to import the contract.

Lesson 1 – Exercise 1.2

Importing an Existing Executed Contract

Create Document

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

SetID STATE Contract ID 42700-023-12121-0001

Supplier GEORGIA SECURITY SYSTEMS INC

Contract Style Agency - Services

*Document Type

Configurator ID

*Description

*Administrator PSMITH01

Sponsor

Department

Cycle Start Date

Cycle Due Date

[Internal Contacts/Signers](#)
[External Contacts/Signers](#)
[Document...](#)

Contract Documents

Select the document to be used

Then select Import Document

Lesson 1 – Exercise 1.2

Importing an Existing Executed Contract

Setting up the Import Document function.

Import Document

SetID STATE Contract ID 42700-023-10404-0001
Supplier NT SECURITY LLC

Document Type

Sponsor

*Administrator JMORTON04

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 Personalize | Find | | First 1 of 1 Last

Basic Info | Details |

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document		<input type="text" value="1.0"/>	<input type="text" value="Executed"/>	<input type="text" value="07/01/2016"/>	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="Clear"/>

Prior Version is not applicable

Contract Documents

Select Current Document

Version is 1.0
Status is Executed
Date and time is the current date or the date the contract was executed and time.

Then click to Upload the State Entity contract document to be imported in.

Lesson 1 – Exercise 1.2

Importing an Existing Executed Contract

Locate the document to be imported and upload.

Import Document

SetID STATE Contract ID 42700-023-10404-0001
Supplier NT SECURITY LLC

Document Type SPD Agency Services Contract
Sponsor
*Administrator JMORTON04 JMORTON04
Department
*Description UNARMED SECURITY SERVICES

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 of amendments)
- Amended Contract and Amendment
(Current contract as fully amended and a current separate amendment summary)
- Original and Amendment
(Original contract as originally signed and a current separate amendment summary)

Current Version

Basic Info Details

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document		1.0	Executed	07/01/2016		Upload	Clear

Prior Version is not applicable

Done with Import Cancel

Upload Contract Document

F:\Supplier Contract Mgmt\AGENCY CONTRACT FOR Browse...

Upload Cancel

Contract Documents

Lesson 1- Exercise 1.2

Importing an Existing Executed Contract

Import Document

SetID STATE Contract ID 42700-023-10404-0001
Supplier NT SECURITY LLC

Document Type SPD Agency Services Contract
Sponsor
*Administrator JMORTON04
Department
*Description UNARMED SECURITY SERVICES

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

Type	File Name	Version	Status	Status Date
Contract Document	AGENCY_CONTRACT_FOR_SERVICES.docx	1.00	Execute	07/01/2022

Prior Version is not applicable

Done with Import Cancel

Contract Documents

The document is uploaded.

Click Done with Import and Yes to message

Import Document

SetID STATE Contract ID 42700-023-12121-0001
Supplier GEORGIA SECURITY SYSTEMS INC

*Document Type SPD Agency Services Contract
Sponsor
*Administrator PSMITH01
Department
*Description Unarmed Security

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.)

Are you sure you are done with import? (10420.576)
If you choose 'Yes, system will save the imported files. You may no longer change them. If you choose No, you may go back to reload a previously imported file.

Yes No

Current Version

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document	Exercise_Document_to_Upload.docx	1.00	Execu	07/01/2022		Upload	Clear

Prior Version is not applicable

Done with Import Cancel

Lesson 1 - Exercise 1.2

Importing an Existing Executed Contract



The contract is created.

Document Management New Window | Help | Pe

SetID STATE Contract ID 42700-023-10404-0001 [Return to Document Search](#)

Supplier NT SECURITY LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description UNARMED SECURITY SERVICES

Administrator JMORTON04

Sponsor Department

Version 1.00	Created On 07/01/16 12:00AM	Document Details
Status Executed	Last Modified On 07/17/18 11:30AM	
Reset to Dispatch	Executed On 07/01/16 12:00:00AM	
Create Amendment		

Imported Document

View and Edit Options: View Document	Review and Approval: Internal Contacts/Signers External Contacts/Signers Document View Access	Other Document Actions: Send to Contacts Deactivate Document
--	---	---

[Add Attachments/Related Documents](#)
[Document Version History](#)

Contract Documents

The contract document has been uploaded.

Note the Version is 1.0 and the status is Executed.

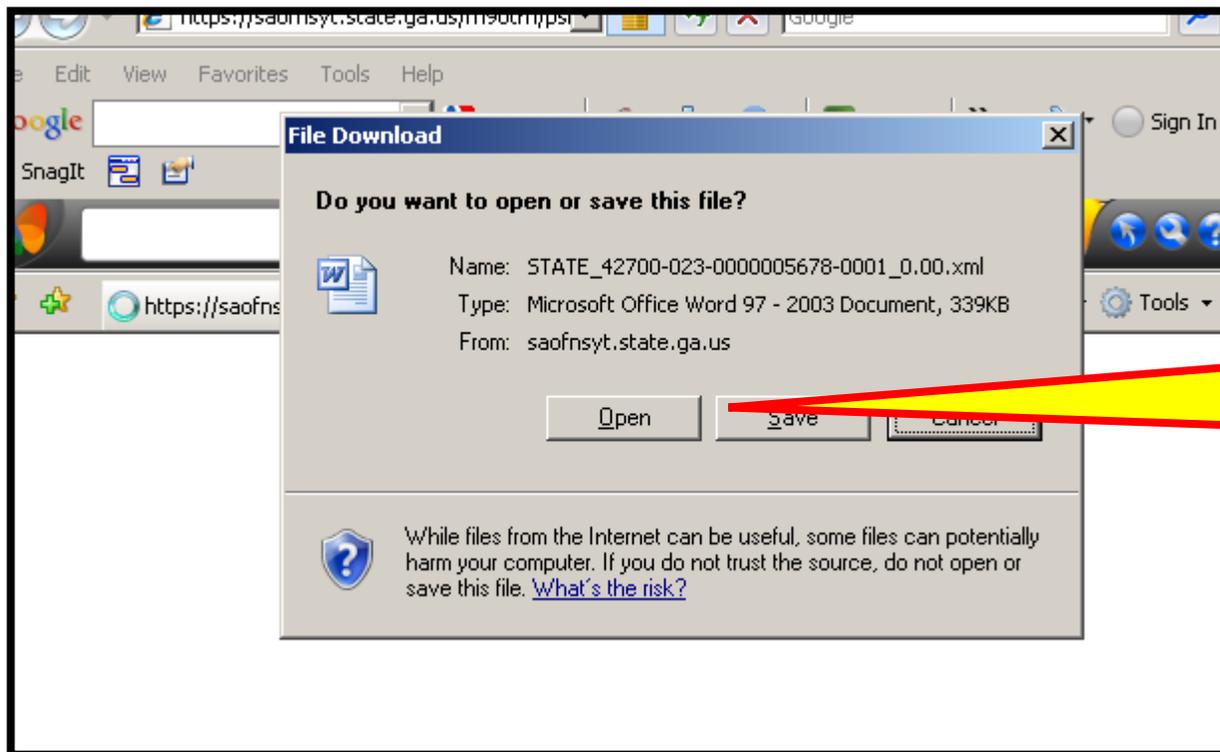
Optional - allows external contacts/signers to review. Contact Help Desk to have this enabled for your agency.

Lesson 1 - Exercise 1.2

Importing an Existing Exempt Contract

How to View the Document.

Contract Documents

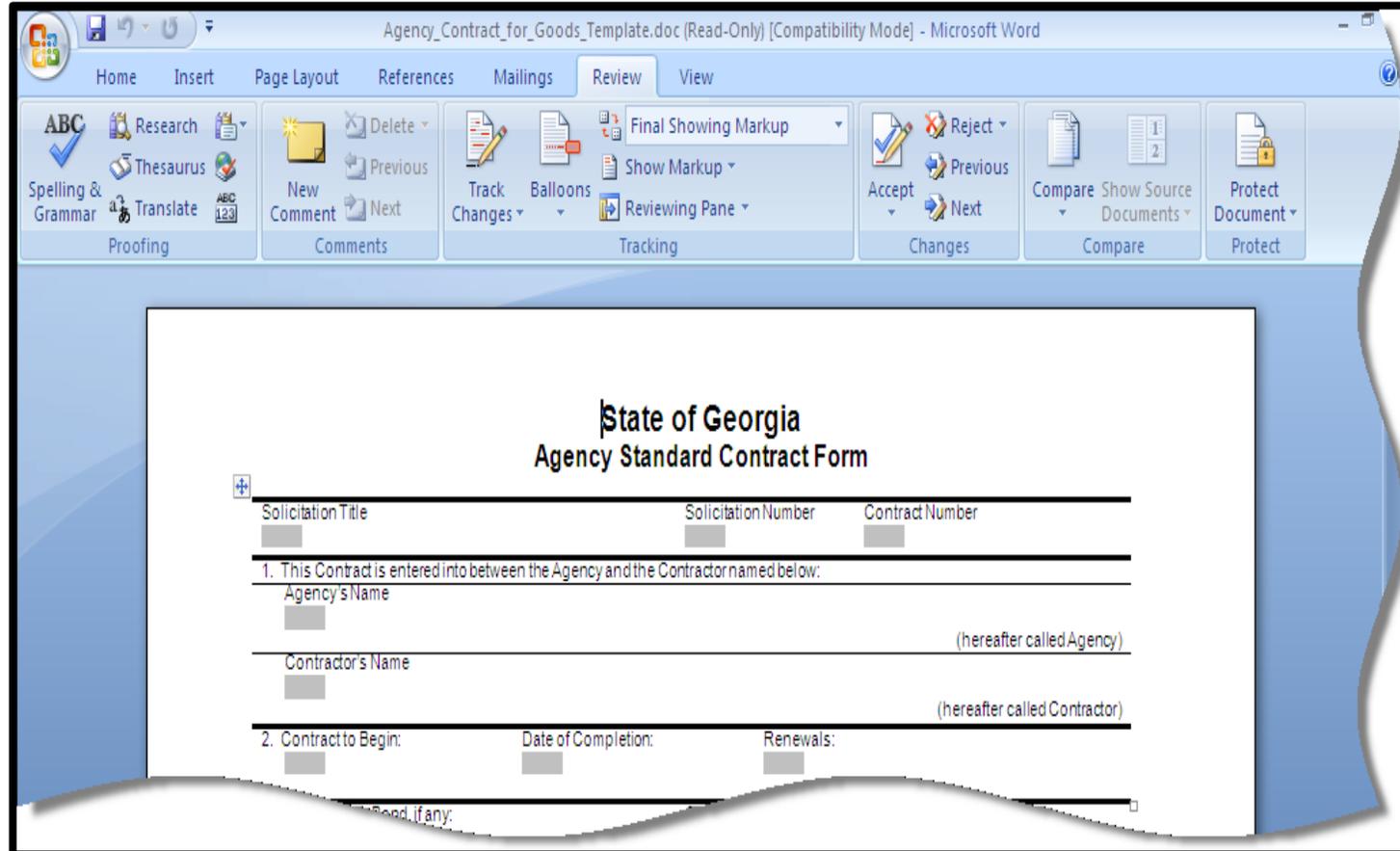


To View, hold down the Ctrl button with the View button until you see Open.

Lesson 1 - Exercise 1.2

Importing an Existing Exempt Contract

Viewing the Document



Contract Documents

Lesson 1 - Exercise 1.2

Importing an Existing Exempt Contract

Reset to Dispatch to upload attachments.

Contract Documents

Document Management New

SetID STATE Contract ID 42700-023-10404-0001 [Return to Document Search](#)

Supplier NT SECURITY LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description UNARMED SECURITY SERVICES

Administrator JMORTON04

Sponsor Department

Version 1.00 Created On 07/01/16 12:00AM [Document Details](#)

Status Executed Last Modified On 07/17/18 11:30AM

Executed On 07/01/16 12:00:00AM

Reset to Dispatch

Create Amendment

Imported Document

View and Edit Options:

[View Document](#)

[Add Attachments/Related Documents](#)

[Document Version History](#)

Review and Approval:

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Other Document Actions:

[Send to Contacts](#)

[Deactivate Document](#)

Lesson 1 - Exercise 1.2

Importing an Existing Exempt Contract

You Reset to Dispatch to be able to attach the relevant documents.

Document Management New

SetID STATE Contract ID 42700-023-10404-0001 [Return to Document Search](#)

Supplier NT SECURITY LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description UNARMED SECURITY SERVICES

Administrator JMORTON04

Sponsor Department

Version 1.00 Created On 07/01/16 12:00AM [Document Details](#)

Status Executed

Reset to Dispatch

Create Amendment

Last Modified On 07/17/18 11:30AM

Executed On 07/01/16 12:00:00AM

Imported Document

View and Edit Options:

[View Document](#)

[Add Attachments/Related Documents](#)

[Document Version History](#)

Review and Approval:

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Other Document Actions:

[Send to Contacts](#)

[Deactivate Document](#)

Contract Documents

Lesson 1 – Exercise 1.2

Importing an Existing Exempt Contract

The documents attached depend on the contract and may include any of the following, if applicable:

- Statewide Contract Waiver
- Piggyback Approval
- NOIA and NOA
- Immigration form (Public Works
- History of Contract
- Insurance/Bond Information
- Contract Administration document
- Contract Action Summary
- Special Terms/Conditions
- eVerify

- Specifications
- Statement of Work
- RFP/RFQC Evaluation
- Negotiation documents
- Amendment History
- Renewals/Extensions
- References
- Contract Assessment Reports
- Supplier Performance Reports

Contract Documents

Lesson 1 – Exercise 1.2

Importing an Existing Exempt Contract

Attaching contract-specific documents.

The screenshot shows a web application window titled "Attachments and Related Documents" for Contract ID 42700-023-12121-0001. The supplier is listed as "GEORGIA SECURITY SYSTEMS INC". A red box highlights the "Upload a Document Attachment File" button. Below this are two sections: "Attachments" and "Related Documents". The "Attachments" section has a table with columns: "Allow Email/Dispatch", "File Name", "Title", "View", and "Delete". The "Related Documents" section has a table with columns: "Allow Email/Dispatch", "Visible to Supplier", "*Source Transaction", "*SetID", "Ad Hoc ID", "Internal", and "Document Status".

Contract Documents

The dialog box is titled "Upload Contract Document Attachment File". It features a "Choose File" button followed by the text "Notice of Award (1).doc". Below this are "Upload" and "Cancel" buttons. A red box highlights the "Choose File" button and the filename.

Lesson 1 – Exercise 1.2

Importing an Existing Exempt Contract

Attaching contract-specific documents.

Attachments and Related Documents

SetID STATE Contract ID 42700-023-10404-0001
Supplier NT SECURITY LLC

Upload another Document Attachment File

Attachments Personalize | Find | First 1 of 1 Last

Files	Description	Title	View	Delete
<input checked="" type="checkbox"/>	Notice_of_Award_(1).doc	Notice of Award	View	

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

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

OK Cancel

Contract Documents

All Contract-specific documents are attached.

Lesson 1 – Exercise 1.2

Importing an Existing Exempt Contract

Execute Contract

Document Management

SetID STATE Contract ID 42700-023-12121-0001 [Return to Document Search](#)

Supplier GEORGIA SECURITY SYSTEMS INC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description Unarmed Security

Administrator PSMITH01

Sponsor Department

Version 1.00 Created On 07/01/21 12:00AM [Document Details](#)

Status Dispatched Last Modified On 06/08/22 11:48AM

[Redispatch](#)

[Execute Contract](#)

Imported Document

View and Edit Options:

[View Document](#)

[Edit Document](#)

[Modify Attachments/Related Documents](#)

[Document Version History](#)

Review and Approval:

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Actions:

[Add Contacts](#)

[Delete Document](#)

[Update Document](#)

Contract Documents

Indicates there are documents attached!

Lesson 1 – Exercise 1.2

Importing an Existing Exempt Contract

Viewing the Document Version History

Document Management New V

SetID STATE Contract ID 42700-023-10404-0001 [Return to Document Search](#)

Supplier NT SECURITY LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description UNARMED SECURITY SERVICES

Administrator JMORTON04

Sponsor Department

Version 1.00 Created On 07/01/16 12:00AM Document Details

Status Executed Last Modified On 07/17/18 11:47AM

Executed On 07/17/18 11:47:28AM

[Reset to Dispatch](#)

[Create Amendment](#)

Imported Document

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

Review and Approval: [Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Other Document Actions: [Send to Contacts](#)

[Deactivate Document](#)

[Modify Attachments/Related Documents](#)

[Document Version History](#)

Contract Documents

In Supplier Contracts Management, you can view the Document History through Document Version History.

Lesson 1 – Exercise 1.2

Importing an Existing Exempt Contract

Setting the contract status to Executed.

Document Management New W

SetID STATE Contract ID 42700-023-10404-0001 [Return to Document Search](#)

Supplier NT SECURITY LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description UNARMED SECURITY SERVICES

Administrator JMORTON04

Sponsor Department

Version 1.00 Created On 07/01/16 12:00AM [Document Details](#)

Status Executed Last Modified On 07/17/18 11:47AM

[Reset to Dispatch](#) Executed On 07/17/18 11:47:28AM

[Create Amendment](#)

Imported Document

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

[Modify Attachments/Related Documents](#)

[Document Version History](#)

Review and Approval:

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Other Document Actions:

[Send to Contacts](#)

[Deactivate Document](#)

Contract Documents

Lesson 1 – Exercise 1.2

Importing an Existing Exempt Contract

System Status **must** be set to Approved and then Saved.

The screenshot displays the 'Contract Entry' interface. At the top, the 'Status' dropdown menu is highlighted with a red box and set to 'Approved'. Below this, the 'Contract' details are visible, including 'Contract Version' (1) and 'Status' (Current). The 'Administered By' field is set to 'PSMTH01'. The 'Contract Description' is 'Unarmed Security'. The 'Supplier' is '000001207'. The 'Contract Type' is 'Business Unit'. The 'Tax Exempt ID' is 'STATE OF GEORGIA'. The 'Currency' is 'USD'. The 'Gross Amount' is '0.00 USD'. The 'Net Amount' is '0.00'. The 'VAT Amount' is '0.00'. The 'Invoice Options' section shows 'Invoice Number' and 'Accounting Template'. The 'Amount Summary' section shows 'Maximum Amount' of '36,000.00 USD'. The 'Contract Open Item Reference' section shows 'Allow Open Item Reference' and 'Adjust Supplier Pricing First'. The 'Contract Items' section shows a table with columns for 'Line', 'Item', 'Description', 'UOM', 'Category', 'Merchandise Price', 'Include for Release', and 'Status'. The table contains one row with 'Unarmed Security Services' and 'Active' status. The 'Contract Categories' section shows a table with columns for 'Line', 'Category', 'Description', and 'Status'. The table contains one row with 'Active' status. At the bottom left, the 'Save' button is highlighted with a red box. Other buttons at the bottom include 'Return to Search', 'Notify', 'Refresh', 'Add', 'Update/Display', and 'Contract History'.

Supplier Contracts – Contracts from Requisitions



Independent Student Exercise 1.3

Create a State Entity Contract From a Requisition



Scenario: Contract Administrator Pete Smith creates a Baby Foods contract in Team Georgia Marketplace™ Supplier Contracts Management. The contract is the direct result of an ePro Requisition. He needs to enter the Contract ID, create the Header, add the lines, import the executed contract, attach all relevant documents, and ensure the System Status is set at Approved and then Save.

You will have 20 minutes to complete the exercise.

Independent Student Exercise 1.3

Create a State Entity Contract From a Requisition

Enter the Contract ID of contracts using the Requisition ID .

The screenshot shows the 'Contract Entry' interface with a 'Look Up Style ID' dialog box open. The dialog box has the following search criteria:

- Style ID: begins with []
- Contract Style: begins with []
- Structure Code: begins with []
- Style Description: begins with []
- Contract Process Option: = []

The search results table is as follows:

Style ID	Contract Style	Structure Code	Style Description	Contract Process Option
AGENCYGOOD	Agency - Goods	GN	Agency contract for goods	General
AGENCYSRVC	Agency - Services	GN	Agency contract for services	General
AP	AP	AP	AP	Voucher
DST	Distributor	DST	Distributor	Dist
GENERAL	GENERAL	GN	GENERAL	General
GN	GENERAL_CNTRCT	GN	GENERAL	General
MFG	Manufacturer	MFG	Manufacturer	Mfg
PO	PO	PO	PO	Order
SWCGOODS	SWC - Goods	GN	Statewide Contract for Goods	General
SWCSERVICE	SWC - Service	GN	Statewide Contract - Services	General

Use this method when creating a contract from any non-Team Georgia Marketplace™ Sourced situations:

The Contract ID is: Business unit 5 digit number-origin-Req ID.

Independent Student Exercise 1.3

Create a State Entity Contract From a Requisition

Complete the top of the Header section.

Contract Entry
Contract

SetID STATE Copy From Contract
Contract ID 42700-023-11111-0001
*Status Open
Approval Due Date

Contract Version
Version 1 Status Current

Administrator/Buyer

Header

*Contract Style Agency - Goods
Process Option General Contract
*Supplier
*Supplier ID
Primary Contact
Supplier Contract Ref
Description
Master Contract ID
*Begin Date 06/08/2022
Expire Date
Renewal Date
Control
 Tax Exempt
 Auto Default
 Lock Chartfields
Fiscal Year
Group
Type
Invoice Options
Invoice Number
AP Business Unit
Accounting Template
Payment Terms ID
Basis Date Type
Amount Summary
Maximum Amount 0.00 USD
Line Item Released Amount 0.00
Category Released Amount 0.00

Add Comments
Contract Activities
Primary Contact Info
Contract Header Agreement
Contract Releases

Retention
Activity Log
Document Status
Thresholds & Notifications
Price Adjustment Template
Purchase Order BU Defaults
 Corporate Contract
Currency USD
Rate Date 06/08/2022 CRRNT
 Must Use Contract Rate Date
 Allow Multicurrency PO
 Multi-Agreement
 Initial Period
 Non-Profit

Gross Amount 0.00 USD
Freight Amount 0.00
Misc Charge Amount 0.00 Miscellaneous Charges
Sales Tax Amount 0.00
VAT Amount 0.00

Header

Header
information is
entered.

Contract Entry
PO Defaults

SetID STATE Contract ID 42700-023-11111-0001 Version 1 Supplier ID 0000417045

Header

*Business Unit 42700
Copy from BU Defaults

Supp Loc 000001
Buyer
Origin 001
Currency
Payment Terms ID
Shipping Information
Ship To
Location
IN Unit
Freight Terms
Ship Via
Charge By Quantity

Billing Location
 Tax Exempt
Tax Exempt ID
AM Business Unit
 Capitalize
Profile ID
Cost Type
Ultimate Use Code
Where Performed

Distributions
Distributions 11

*GL Unit	Account	Fund	Dept	Fund Src	Class	Bud Ref	Product	PC Bus Unit	Project

Add Comments
OK Cancel Refresh

Independent Student Exercise 1.3

Create a State Entity Contract From a Requisition

The second line is added and the Header and Lines are Saved.

Lines

Add the Line information.

When you have completed adding all of the lines, click to Save the information on the Header and the Lines.

Line	Item	Description	UOM	Category	Merchandise Amt	Include for Release	Status
1		Canned Baby Food	CS	39331	4,000.00	<input checked="" type="checkbox"/>	Active
2		Baby Juice	cs	38554	1083	<input checked="" type="checkbox"/>	Active

Total equals the Maximum Amount on the Header section.

Independent Student Exercise 1.3

Create a State Entity Contract From a Requisition

Contract

SetID STATE Contract Version Version 1 Status Current

Contract ID 42700-023-11111-0001

*Status Open Approval Due Date

Administrator/Buyer PSMITH01 **Add a Document**

▼ Header

*Contract Style Agency - Goods

Process Option General Contract

*Supplier ACORNFOODG-0 Supplier Search

*Supplier ID 0000417845 ACORN FOOD GROUP LLC

Primary Contact

Supplier Contract Ref

Description BABY FOOD

Master Contract ID

*Begin Date 07/01/2021

Expire Date 06/30/2022

Renewal Date

Control Type Business Unit

Step 1

Create Document

Source Purchasing Contracts Return to Document Search

SetID STATE Contract ID 42700-023-11111-0001

Supplier ACORN FOOD GROUP LLC

Contract Style Agency - Goods

*Document Type *****Non Standard Contract**

Configurator

*Description DHR Standard Contract
SPD Agency Equip Rent/Lease Cn
SPD Agency Goods Contract
SPD Agency Services Contract
SPD Agency Software Contract

*Administrator PSMITH01

Sponsor

Department

Cycle Start Date Cycle Due Date

Create Document **Import Document** Internal Contacts/Signers
External Contacts/Signers
Document View Access

Save

Step 2

Import Document

SetID STATE Contract ID 42700-023-11111-0001

Supplier ACORN FOOD GROUP LLC

*Document Type SPD Agency Goods Contract

Sponsor

*Administrator PSMITH01 PSMITH01

Department

*Description BABY FOOD

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

Basic Info Details

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document		1.0	Execut	07/01/2021		Upload	Clear

Prior Version is not applicable

Done with Import Cancel

Step 3

Independent Student Exercise 1.3

Create a State Entity Contract From a Requisition

Import Document

SetID STATE Contract ID 42700-023-11111-0001
Supplier ACORN FOOD GROUP LLC

*Document Type SPD Agency Goods Contract
Sponsor
*Administrator PSMITH01 PSMITH01
Department
*Description BABY FOOD

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

Basic Info Details

Type	File Name	Version	Status	Status Date	Status Time	Upload
Contract Document	Exercise_Document_to_Upload.docx	1.00	Execut	07/01/2021		Upload

Prior Version is not applicable

Are you sure you are done with import? (10420,576)

If you choose Yes, system will save the imported files. You may no longer change them. If you choose No, you may go back to reload a previously imported file.

Independent Student Exercise 1.3

Create a State Entity Contract From a Requisition

Document Management

SetID STATE Contract ID 42700-023-11111-0001 [Return to Document Search](#)

Supplier ACORN FOOD GROUP LLC

Contract Style Agency - Goods

Document Type SPD Agency Goods Contract

Description BABY FOOD

Administrator PSMITH01

Sponsor

Version 1.00

Status Executed

Imported Document

View and Edit Options:

[Add Attachments/Related Documents](#)

[Document Version History](#)

Step 1

Document Management

SetID STATE Contract ID 42700-023-11111-0001 [Return to Document Search](#)

Supplier ACORN FOOD GROUP LLC

Contract Style Agency - Goods

Document Type SPD Agency Goods Contract

Description BABY FOOD

Administrator PSMITH01

Sponsor

Department

Version 1.00 Created On 07/01/21 12:00AM

Status Dispatched Last Modified On 06/08/22 12:37PM

Imported Document

View and Edit Options:

Review and Approval:

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

[Document Version History](#)

Step 2

Attachments and Related Documents

SetID STATE Contract ID 42700-023-11111-0001

Supplier ACORN FOOD GROUP LLC

Attachments

Allow Email/Dispatch	File Name	Title	View	Delete
<input type="checkbox"/>			<input type="button" value="View"/>	<input type="button" value="🗑"/>

Related Documents

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

Step 3

Document Management

SetID STATE Contract ID 42700-023-11111-0001 [Return to Document Search](#)

Supplier ACORN FOOD GROUP LLC

Contract Style Agency - Goods

Document Type SPD Agency Goods Contract

Description BABY FOOD

Administrator PSMITH01

Sponsor

Department

Version 1.00 Created On 07/01/21 12:00AM

Status Dispatched Last Modified On 06/08/22 12:43PM

Imported Document

View and Edit Options:

[Add Attachments/Related Documents](#)

[Document Version History](#)

Review and Approval:

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Other Document Actions:

Step 4

Independent Student Exercise 1.3

Create a State Entity Contract From a Requisition

Document Management

SetID STATE
Supplier ACORN FOOD GROUP LLC
Contract Style Agency - Goods
Document Type SPD Agency Goods Contract
Description BABY FOOD
Administrator PSMITH01

Sponsor _____ Department _____

Version 1.00
Status Executed

[Reset to Dispatch](#)
[Create Amendment](#)

Imported Document

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

Review and Approval:
[Internal Contacts/Signers](#)
[External Contacts/Signers](#)
[Document View Access](#)

Other Document Actions:
[Send to C...](#)
[Deactivate D...](#)

Contract ID 42700-023-11111-0001 [Return to Docu...](#)

Created On 07/01/21 12:00AM [Document Details](#)
Last Modified On 06/08/22 12:45PM
Executed On 06/08/22 12:45:34PM



Contract Entry

Contract

SetID STATE
Contract ID 42700-023-11111-0001
*Status **Approved**

Contract Version
Version 1
Status Current

Approval Due Date _____

Administrator/Buyer PSMITH01 PSMITH01

Authored Document

Authored Status Executed [Maintain Document](#)

Document Version 1.00
Description BABY FOOD
Amendment 0
Document Administrator PSMITH01

Sponsor _____
Department _____
Created Date/time 07/01/2021 12:00AM
Last modified date 06/08/2022 12:45PM

Header

Contract Style Agency - Goods
Process Option General Contract
Supplier ACORNFOODG-001
Supplier ID 0000417845 [ACORN FOOD GROUP LLC](#)
Primary Contact
Supplier Contract Ref
Description BABY FOOD
Master Contract ID
Begin Date 07/01/2021
Expire Date 06/30/2022
Renewal Date
Control Type Business Unit
 Tax Exempt
 Auto Default
 Lock Chartfields

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

[Retention](#)
[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)
[Price Adjustment Template](#)
[Purchase Order BU Defaults](#)

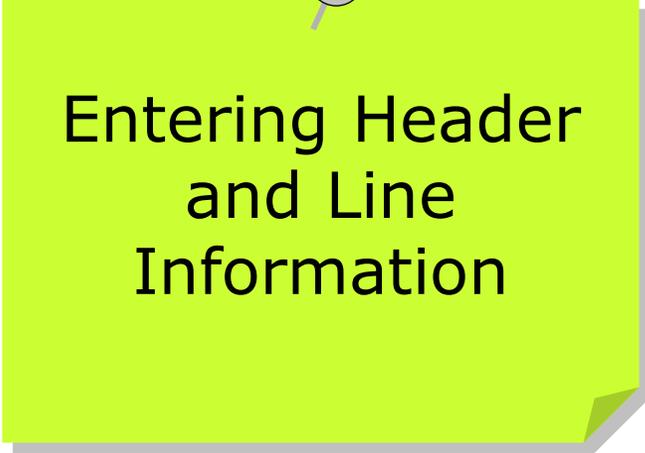
Tax Exempt ID STATE OF GEORGIA
Fiscal Year 2022
 Corporate Contract

Currency USD

Lesson 1: Summary



Creating &
Importing an
Existing Contract
(Unarmed Security)



Entering Header
and Line
Information



Adding
Attachments
to the
Contract



Creating a Contract
from a Requisition
(Baby Food)

Poll Question

Select the best choice

The person responsible for creating, monitoring and updating contracts is the _____ in the Supplier Contracts module.

- a) Step Owner
- b) Compliance Officer
- c) Contract Administrator
- d) Buyer
- e) Verifier

CONTRACT
MANAGEMENT

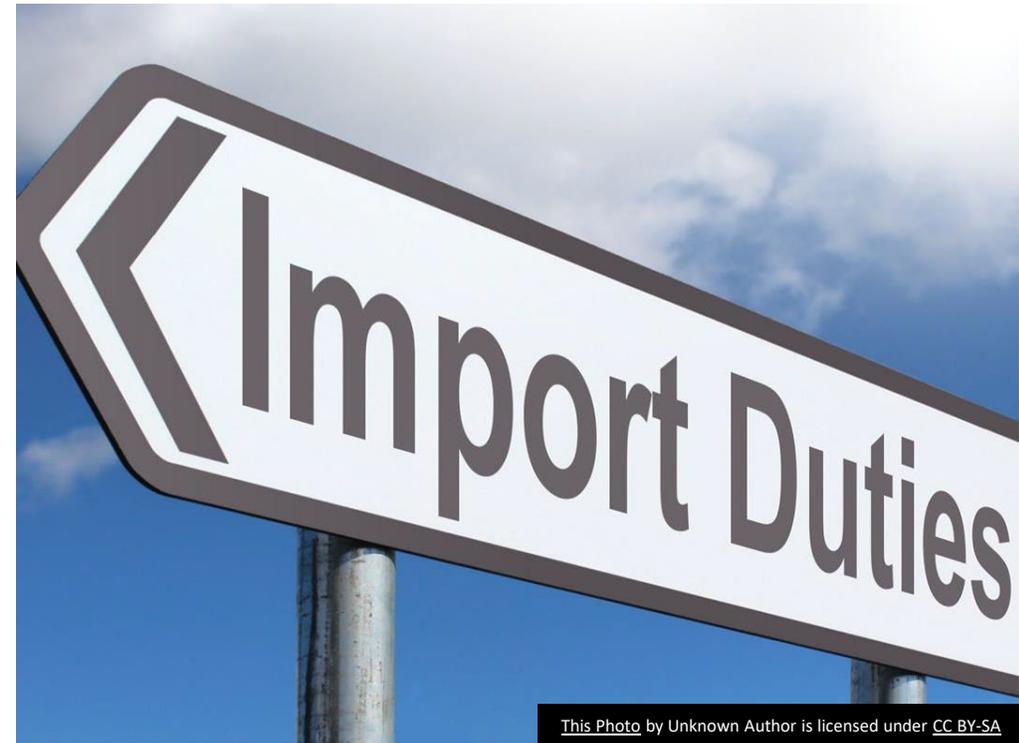


Poll Question

True or False

To import an existing contract into Supplier Contracts Management you begin on the Add a New Value tabs.

- a) True
- b) False



Poll Question

True or False

In Team Georgia Marketplace™, you change the SetID from STATE to the number representing your state entity business unit.

- a) True
- b) False





Enterprise Learning



Department of Administrative Services
Improving efficiency, compliance and workforce performance

Lesson Two: Create a Contract from a Team Georgia Marketplace™ Strategic Sourced Event

Lesson Objectives



By completing this lesson, you will create a contract from a Team Georgia Marketplace™-Sourced Event

Supplier Contracts – Team Georgia Marketplace™ Sourcing Events

Working with contracts in Team Georgia Marketplace™:



Lesson 2 - Exercise 2.0

Create a Team Georgia Marketplace™ Sourced Contract



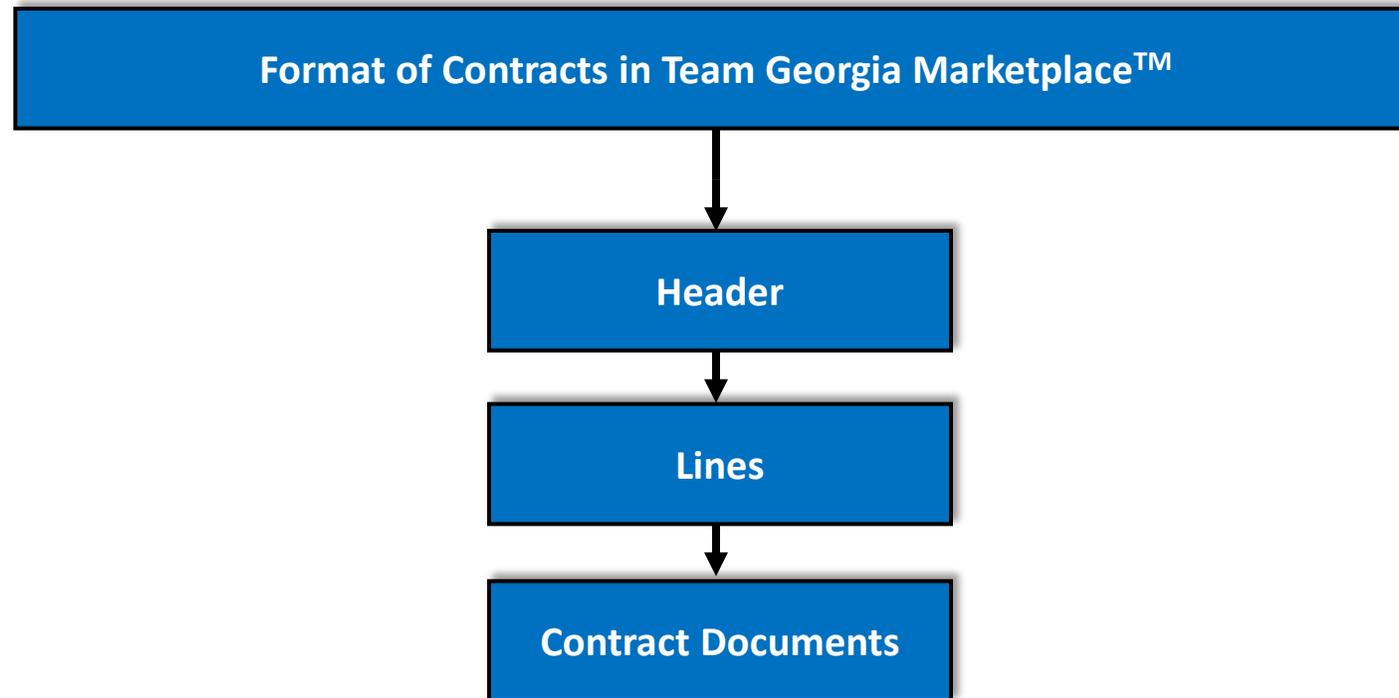
Scenario: Pete Smith needs to complete the Pest Control Services sourcing event contract in Team Georgia Marketplace™. The contract was initiated with the awarding of the Sourcing Event and the Contract ID was established then. Much of the Header information is populated as is the Line information. The contract has already been signed and executed.

Also, Thresholds and Notifications will be added.

Lesson 2 - Exercise 2.0

Create a Team Georgia Marketplace™ Sourced Contract

Format of a contract in Team Georgia Marketplace™:



Lesson 2 - Exercise 2.0

Create a Team Georgia Marketplace™ Sourced Contract



The Contract ID is generated from the Sourcing Event.

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](#)

Search Criteria

*SetID =

Contract ID contains

Contract Version =

Version Status =

Contract Process Option =

Supplier ID begins with

Short Supplier Name begins with

Supplier Name begins with

Contract Status =

Master Contract ID begins with

Description begins with

Supplier Contract Ref begins with

Corporate Contract =

Contract Style begins with

Correct History Case Sensitive

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

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

Search options for finding contracts. The Contract Version will always be 1. We are not using Version Status.

We can now search by Supplier Name in addition to Short Supplier Name.

We can also make our searches Case Sensitive. If this box is checked, the search will look for exactly what is entered.

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

Search Results

[View All](#) 1-1 of 1

SetID	Contract ID	Contract Version	Version Status	Contract Process Option	Supplier ID	Short Supplier Name	Supplier Name	Expire Date	Contract Status	Master Contract ID	Description	Supplier Contract Ref	Corporate Contract	Contract Style
STATE	42700-001-DHS0000287-0001	1	Current	General	0000010237	ORKIN-001	ORKIN LLC	(blank)	Open	(blank)	001PEST CONTROL	(blank)	Yes	AGENCYSRVC

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

Lesson 2 - Exercise 2.0

Create a Team Georgia Marketplace™ Sourced Contract



A lot of information populates automatically from the Sourcing Event.

Contract Entry
Contract

SetID STATE Contract Version Version 1 Status Current
Contract ID 42700-001-DHS0000287-0001 Approval Due Date
*Status Open

Administrator/Buyer JMORTON01 J MORTON01 Add a Document

▼ Header ⓘ

*Contract Style Agency - Services
Process Option General Contract
*Supplier ORKIN-001 Supplier Search
*Supplier ID 0000010237 ORKIN LLC
Primary Contact 2 MCDONOUGH162
Supplier Contract Ref
Description 001Pest Control
Master Contract ID
*Begin Date 07/01/2021
Expire Date 06/30/2022
Renewal Date
Control Type Business Unit
 Tax Exempt Tax Exempt ID STATE OF GA
 Auto Default Fiscal Year 2022
 Lock Chartfields Group
Type

Add Comments
Contract Activities
Primary Contact Info
Contract Header Agreement
Contract Releases

Retention
Activity Log
Document Status
Thresholds & Notifications
Price Adjustment Template
Purchase Order BU Defaults

Corporate Contract
Currency USD
Rate Date 09/23/2018 CRRNT
 Must Use Contract Rate Date
 Allow Multicurrency PO
 Multi-Agreement
 Initial Period Renewals
 Non-Profit

▼ Invoice Options

Invoice Number
AP Business Unit
Accounting Template
Payment Terms ID N30

Gross Amount 36,000.00 USD
Freight Amount 0.00
Misc Charge Amount 0.00 Miscellaneous Charges
Sales Tax Amount 0.00

Header

Information that comes from the Sourcing Event is automatically populated.

The Begin Date will need to be corrected and the FY entered. Also the Maximum Amount will need to be entered.

Lesson 2 - Exercise 2.0

Create a Team Georgia Marketplace™ Sourced Contract

Header

You must review comments and attachments.

Contract Entry
Contract

SetID STATE Contract ID 42700-001-DHS0000287-0001 *Status Open Contract Version 1 Status Current Approval Due Date

Administrator/Buyer JMORTON01 J MORTON01 Add a Document

Header

*Contract Style Agency - Services

Process Option General Contract

*Supplier ORKIN-001 Supplier Search

*Supplier ID 0000010237 ORKIN LLC

Primary Contact 2 MCDONOUGH182

Supplier Contract Ref

Description 001Pest Control

Master Contract ID

*Begin Date 07/01/2021

Expire Date 06/30/2022

Renewal Date

Control Type Business Unit

Tax Exempt Tax Exempt ID

Auto Default Fiscal Year

Lock Chartfields

Type

Invoice Options

Invoice Number 36,000.00 USD

AP Business Unit

Accounting Template

Payment Terms ID N30

Basis Date Type

Amount Summary

Maximum Amount 36,000.00 USD

Line Item Released Amount 0.00

Add Comments

Primary Contact Info
Contract Header Agreement
Contract Releases

Retention
Activity Log
Document Status
Thresholds & Notifications
Price Adjustment Template
Purchase Order BU Defaults

Renewals

Miscellaneous Charges

Releases

Releases

Comments and Attachments from Sourcing Event Header

Maximum Amount is the total from all lines

Contract Entry
Header Comments

SetID: STATE Contract ID: 42700-023-DHS0000203-0001 Version: 1

Retrieve Active Comments Only Retrieve

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending Sort

Comments Find | View All First 1 of 2 Last

Use Standard Comments Comment Status: Active Inactivate

RFq

Send to Vendor Show at Receipt Copy to Purchase Order

Show at Voucher

Associated Document

Attachment: eRFQ_Template_doc_09_26_08.doc Attach View Delete Email

From -> SSE 42700-DHS0000203

OK Cancel Refresh

Lesson 2 - Exercise 2.0

Create a Team Georgia Marketplace™ Sourced Contract

Review the comments and attachments from Event

The screenshot shows a web application interface for reviewing contract comments and attachments. The interface is titled "FN90TRN" and includes a "Home" link. The main content area is titled "Contract Entry" and "Header Comments". It displays the following information:

- SetID: STATE Contract ID: 42700-023-DHS0000115-0001
- Retrieve Active Comments Only
- *Sort Method: *Sort Sequence:
- Comments: First Last
- Comment Status: Active
- Tasks:
- Send to Vendor Shown at Receipt Shown at Voucher Copy to Purchase Order
- Associated Document: Attachment 2011_Refresh_Calendar_122810.doc Email
- From -> SSE 42700-DHS0000115
-

Header

Click Email to allow for attachment to be emailed

Lesson 2 - Exercise 2.0

Create a Team Georgia Marketplace™ Sourced Contract

Review the Line information

Lines

Line	Item	Description	UOM	Category	Merchandise Amt	Include for Release	Status
1		Pest Control	MON	91059	300	<input checked="" type="checkbox"/>	Active

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

Confirm the Line information is correct.

Comments and/or attachments from the Event Lines.

Lesson 2 - Exercise 2.1

Thresholds and Notifications

Contract Entry

Contract

SetID STATE Contract Version 1 Status Current

Contract ID 42700-001-DHS0000287-0001

*Status Open Approval Due Date

Administrator/Buyer JMORTON01 J MORTON01 Add a Document

▼ Header ?

*Contract Style Agency - Services

Process Option General Contract

*Supplier ORKIN-001 Supplier Search

*Supplier ID 0000010237 ORKIN LLC

Primary Contact 2 MCDONOUGH162

Supplier Contract Ref

Description 001Pest Control

Master Contract ID

*Begin Date 07/01/2021

Expire Date 06/30/2022

Renewal Date

Control Type Business Unit

Tax Exempt Tax Exempt ID STATE OF GA

Auto Default Fiscal Year 2022

Lock Chartfields

Group

Type

Corporate Contract

Currency USD

Rate Date 09/23/2018 CRRNT

Must Use Contract Rate Date

Allow Multicurrency PO

Multi-Agreement

Initial Period Renewals

Non-Profit

▼ Invoice Options

Invoice Number

AP Business Unit

Accounting Template

Payment Terms ID N30

Basis Date Type

Gross Amount 36,000.00 USD

Freight Amount 0.00

Misc Charge Amount 0.00 Miscellaneous Charges

Sales Tax Amount 0.00

VAT Amount 0.00

▼ Amount Summary ?

Maximum Amount 36,000.00 USD

Line Item Released Amount 0.00

Retention

Activity Log

Thresholds & Notifications

Price Adjustment Template

Purchase Order BU Defaults

Header

Lesson 2 - Exercise 2.1

Thresholds and Notifications

Contract Entry
Contract

SetID STATE Contract Version Version 1 Status Current
Contract ID 42700-001-DHS0000287-0001
*Status Open Approval Due Date

Administrator/Buyer JMORTON01 J MORTON01 [Add a Document](#)

Header

*Contract Style Agency - Services
Process Option General Contract
*Supplier ORKIN-001 [Supplier Search](#)
*Supplier ID 0000010237 [ORKIN LLC](#)
Primary Contact 2 [MCDONOUGH162](#)
Supplier Contract Ref
Description 001Pest Control
Master Contract ID
*Begin Date 07/01/2021
Expire Date 06/30/2022
Renewal Date
Control Type Business Unit
 Tax Exempt Tax Exempt ID STATE OF GA
 Auto Default Fiscal Year 2022
 Lock Chartfields Group
Type

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

[Retention](#)
[Activity Log](#)
[Thresholds & Notifications](#)
[Purchase Order BU Defaults](#)

Corporate Contract
Currency USD
Rate Date 09/23/2018 CRRNT
 Must Use Contract Rate Date
 Allow Multicurrency PO
 Multi-Agreement
 Initial Period
 Non-Profit [Renewals](#)

Invoice Options

Invoice Number
AP Business Unit
Accounting Template
Payment Terms ID N30
Basis Date Type

Gross Amount 36,000.00 USD
Freight Amount 0.00
Misc Charge Amount 0.00 [Miscellaneous Charges](#)
Sales Tax Amount 0.00
VAT Amount 0.00

Amount Summary

Maximum Amount 36,000.00 USD
Line Item Released Amount 0.00

Header

Lesson 2 - Exercise 2.1

Thresholds and Notifications

Thresholds & Notifications

[Help](#)

Send Date/Amount Notification Send Threshold Notification

[Expand All](#) [Collapse All](#)

- ▶ Date Notification
- ▶ Maximum Amount Notification
- ▶ Spend Threshold Notification

▼ Notification Assignments

◀ ▶ 1-1 of 1 ▼ ▶ ▶ | [View All](#)

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

▼ Amount Summary

Maximum Amount	<input type="text" value="36,000.00"/>	USD
Total Line Released Amount	0.00	
Total Category Released Amount	0.00	
Open Item Released Amount	0.00	
<hr/>		
Remaining Amount	36,000.00	
Remaining Percent	100.00	

Lesson 2 - Exercise 2.1

Thresholds and Notifications

Thresholds & Notifications

Send Date/Amount Notification Send Threshold Notification

[Expand All](#) [Collapse All](#)

▶ **Date Notification**

▶ **Maximum Amount Notification**

▶ Spend Threshold Notification

▼ **Notification Assignments**

 << < 1-1 of 1 > >> | [View All](#)

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

▼ **Amount Summary**

Maximum Amount	<input type="text" value="36,000.00"/>	USD
Total Line Released Amount	0.00	
Total Category Released Amount	0.00	
Open Item Released Amount	0.00	
<hr/>		
Remaining Amount	36,000.00	
Remaining Percent	100.00	

Lesson 2 - Exercise 2.1

Thresholds and Notifications

Thresholds & Notifications

Send Date/Amount Notification Send Threshold Notification

[Expand All](#) [Collapse All](#)

- ▶ Date Notification
- ▶ Maximum Amount Notification
- ▶ Spend Threshold Notification
- ▼ Notification Assignments

1-1 of 1 | [View All](#)

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

▼ Amount Summary

Maximum Amount	<input type="text" value="36,000.00"/>	USD
Total Line Released Amount	0.00	
Total Category Released Amount	0.00	
Open Item Released Amount	0.00	
<hr/>		
Remaining Amount	36,000.00	
Remaining Percent	100.00	

Lesson 2 - Exercise 2.1

Thresholds and Notifications

Thresholds & Notifications

Send Date/Amount Notification Send Threshold Notification

[Expand All](#) [Collapse All](#)

▼ Date Notification
Notify user when contract is within specified days of Expire Date.

Expire Date Notify Days Before Expires

Expiration Notification Date 06/30/2022

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

Renewal Date Notify Days Before Renewal

Renewal Notification Date

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

Approval Due Date Notify Days Before Approval

Approval Notification Date

▶ **Maximum Amount Notification**

▶ **Spend Threshold Notification**

▼ Notification Assignments

1-1 of 1 | View All

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

▼ Amount Summary

Maximum Amount	<input type="text" value="36,000.00"/>	USD
Total Line Released Amount	0.00	
Total Category Released Amount	0.00	
Open Item Released Amount	0.00	
<hr/>		
Remaining Amount	36,000.00	
Remaining Percent	100.00	

Lesson 2 - Exercise 2.1

Thresholds and Notifications

Thresholds & Notifications

Send Date/Amount Notification Send Threshold Notification

[Expand All](#) [Collapse All](#) [Help](#)

Date Notification

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

Expire Date: 06/30/2022 **Notify Days Before Expires: 60**

Expiration Notification Date: 05/01/2022

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

Renewal Date: **Notify Days Before Renewal:**

Renewal Notification Date:

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

Approval Due Date: **Notify Days Before Approval:**

Approval Notification Date:

Maximum Amount Notification

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

Amount Less than Maximum: 3,600.00 USD

Percent Less than Maximum: 10.00

Notification Amount: 32,400.00

Spend Threshold Notification

Notification Assignments

1-1 of 1 | View All

	Notification Type	User ID	User Description	Email Address		
1	Expiration	PSMITH01	PSMITH01		+	-

Amount Summary

Maximum Amount: 36,000.00 USD

Total Line Released Amount: 0.00

Total Category Released Amount: 0.00

Open Item Released Amount: 0.00

Remaining Amount: 36,000.00

Remaining Percent: 100.00

Lesson 2 - Exercise 2.1

Thresholds and Notifications

Now import the executed contract

Contract Documents

Contract Entry
Contract

SetID STATE Contract Version
Contract ID 42700-001-DHS0000287-0001 Version 1 Status Current
*Status Open Approval Due Date

Administrator/Buyer JMORTON01 J MORTON01

▼ Header ⓘ

*Contract Style Agency - Services

Process Option General Contract
*Supplier ORKIN-001 [Add Comments](#)

*Supplier ID 0000010237

Primary Contact

Supplier Contract Ref

Description 001Pest Control

Master Contract ID

*Begin Date 07/01/2021

Expire Date 06/30/2022

Renewal Date

Create Document

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

SetID STATE Contract ID 42700-001-DHS0000287-0001
Supplier ORKIN LLC

Contract Style Agency - Services
*Document Type **SPD Agency Services Contract** ▼

Configurator ID SPD_AGENCY_CNTRCT_SRV SPD - AGENCY STANDARD CONTRACT - Services
*Description 001Pest Control

*Administrator JMORTON01 J MORTON01
Sponsor

Department

Use Wizard Responses from Document: (Select Document)

[Internal Contacts/Signers](#)
[External Contacts/Signers](#)
 [Document View Access](#)

Import Document

SetID STATE Contract ID 42700-001-DHS0000287-0001
Supplier ORKIN LLC

*Document Type SPD Agency Services Contract ▼
Sponsor

*Administrator JMORTON01 J MORTON01
Department

*Description 001Pest Control

Import Option

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

(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

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document		1.0	Execut	07/01/2021		<input type="button" value="Upload"/>	<input type="button" value="Clear"/>

Click Here

Lesson 2 - Exercise 2.1

Thresholds and Notifications

The contract is imported, but attachments still need to be added.

Document Management

SetID STATE Contract ID 42700-001-DHS0000287-0001 [Return to Document Search](#)

Supplier ORKIN LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description 001Pest Control

Administrator J MORTON01

Sponsor Department

Version 1.00 Created On 07/01/21 12:00AM

Status Executed Last Modified On Executed On

[Reset to Dispatch](#)

[Create Amendment](#)

Imported Document

View and Edit Options:

[View Document](#)

[Add Attachments/Related Documents](#)

[Document Version History](#)

Review and Approval

[Internal Contacts/Signatures](#)

[External Contacts/Signatures](#)

[Document View Access](#)

Attachments and Related Documents

SetID STATE Contract ID 42700-001-DHS0000287-0001 [Help](#)

[Upload a Document Attachment File](#)

Documents

Files	Description	
<input type="checkbox"/>		View Delete

Related Documents

Related Documents	Details	
<input type="checkbox"/>	<input type="checkbox"/> Visible to Supplier *Source Transaction *SetID Ad Hoc ID Internal Document Status	+ -

[OK](#) [Cancel](#)

Attachments

Files	Description	
<input checked="" type="checkbox"/>	CERTIFICATE_OF_INSURANCE.docx	<input type="text" value="Certificate of Insurance"/> View Delete

Contract Documents

Once the contract is imported in, the documents associated with the contract that are not already linked to the Sourcing Event need to be attached.

Lesson 2 - Exercise 2.1

Thresholds and Notifications

Make sure all relevant attachments are included.

Contract Documents

Attachments and Related Documents

SetID: STATE Contract ID: 42700-023-DHS0000200-0001
Vendor: ADAMS EXTERMINATORS INC

[Upload another Document Attachment File](#)

Attachments Customize | Find | [Print] | [Grid] | First 1 of 1 Last

Files	Description			
Allow Email/Dispatch	File Name	Title	View	Delete
<input checked="" type="checkbox"/>	Insurance.doc	Insurance	View	-

Transactional Attachments Customize | Find | [Print] | [Grid] | First 1-4 of 4 Last

Email to Vendor	Comment Type	Attached File	View
<input checked="" type="checkbox"/>	Header	Supplier_infor_doc.pdf	View
<input type="checkbox"/>	Header	eRFQ_Template_doc_09_26_08.doc	View
<input type="checkbox"/>	Line	Pest_control_SOW.doc	View
<input checked="" type="checkbox"/>	Line	Pest_control_task_list.doc	View

Related Documents Customize | Find | View All | [Print] | [Grid] | First 1 of 1 Last

Related Documents	Details								
Allow Email/Dispatch	Visible to Supplier	*Source Transaction	*SetID	Ad Hoc ID		Internal	Document Status		
<input type="checkbox"/>	<input type="checkbox"/>	Ad Hoc	STATE			<input type="checkbox"/>		+	-

[OK](#) [Cancel](#)

Lesson 2 - Exercise 2.1

Thresholds and Notifications

Contract is ready to be Executed.

SetID STATE Contract ID 42700-001-DHS0000287-0001 [Return to Document Search](#)

Supplier ORKIN LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description 001Pest Control

Administrator J MORTON01

Sponsor Department

Version 1.00 Created On 07/01/21 12:00AM [Document Details](#)

Status Dispatched Last Modified On 06/08/22 2:37PM

[Redispatch](#)

[Execute Contract](#)

Imported Document

View and Edit Options:

[View Document](#)

[Edit Document](#)

[Modify Attachments/Related Documents](#)

[Document Version History](#)

Review and Approval:

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Other Document Actions:

[Send to Contacts](#)

[Recreate Document](#)

[Deactivate Document](#)

Contract Documents

Contract Entry

Contract

SetID STATE Contract Version

Contract ID 42700-001-DHS0000287-0001 Version 1 Status Current

*Status Approved Approval Due Date

Administrator/Buyer JMORTON01 JMORTON01

Lesson 2 - Exercise 2.1

Thresholds and Notifications

System Status is set to Approved

Contract Entry

Contract

SetID	STATE	Contract Version	
Contract ID	42700-001-DHS0000287-0001	Version	1
*Status	Approved	Status	Current
Approved Date	06/08/2022		
Administrator/Buyer	JMORTON01	J MORTON01	

▼ Authored Document

Authored Status	Executed	Maintain Document	
Document Version	1.00	Sponsor	
Description	001Pest Control	Department	
Amendment	0	Created Date/time	07/01/2021 12:00AM
Document Administrator	JMORTON01	Last modified date	06/08/2022 2:39PM

▼ Header ?

Contract Style	Agency - Services	Add Comments
Process Option	General Contract	Contract Activities
Supplier	ORKIN-001	Primary Contact Info
Supplier ID	0000010237 ORKIN.LLC	Contract Header Agreement
Primary Contact	2 MCDONOUGH162	Contract Releases
Supplier Contract Ref		
Description	001Pest Control	Retention
Master Contract ID		Activity Log
Begin Date	07/01/2021	Document Status
Expire Date	06/30/2022	Thresholds & Notifications
Renewal Date		Price Adjustment Template
Contract Type	Business Unit	Purchase Order BU Defaults

Make sure the System Status is set to Approved, the Contract Status is at Executed and the Maintain Document button is shown. Remember to Save!

Independent Student Exercise 2.2

Create a Contract From an Existing Contract



Existing Contracts

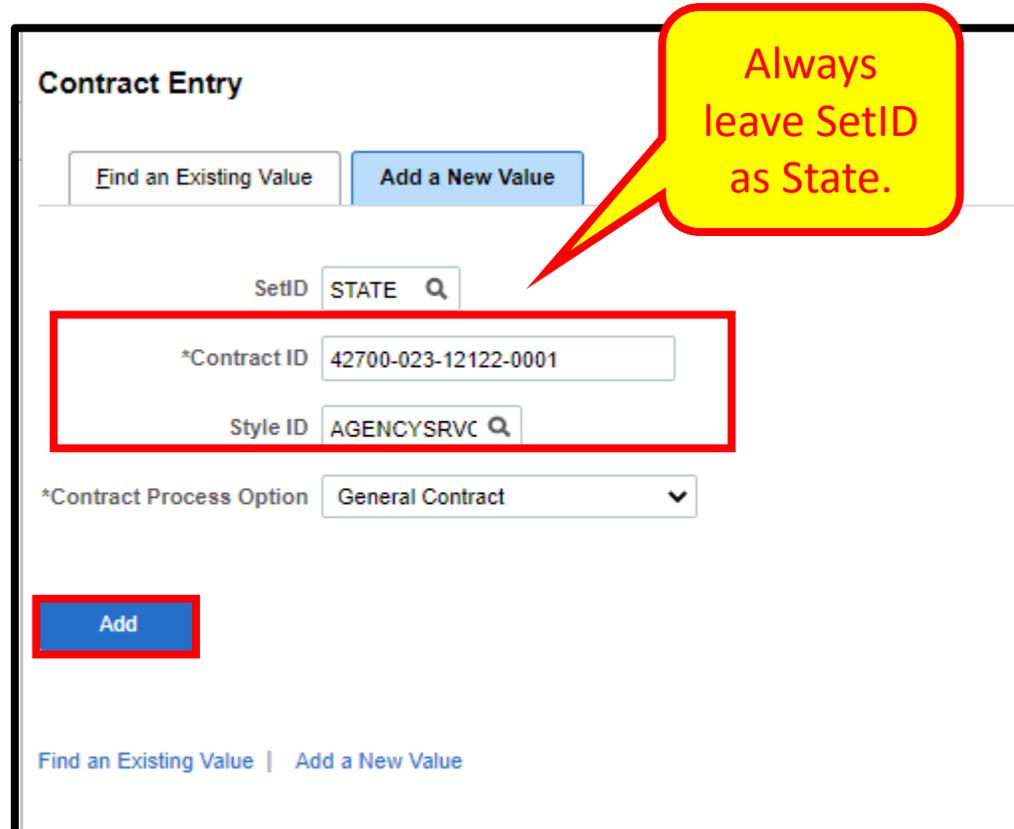
Scenario: Contract Administrator Pete Smith needs to import the Trash Removal contract for \$12,000 that was recently executed in July 202X. He completes the Header, Lines, and Contract.

You have 45 minutes to complete the exercise.

Independent Student Exercise 2.2

Create a Contract From an Existing Contract

You enter all Contract IDs of contracts in Team Georgia Marketplace™ the same way.



The screenshot shows the 'Contract Entry' form with the following fields and annotations:

- Contract Entry** header
- Buttons: [Find an Existing Value](#) and [Add a New Value](#)
- SetID: STATE (with a search icon)
- *Contract ID: 42700-023-12122-0001 (highlighted with a red box)
- Style ID: AGENCYSRVC (with a search icon)
- *Contract Process Option: General Contract (dropdown menu)
- [Add](#) button (highlighted with a red box)
- Footer: [Find an Existing Value](#) | [Add a New Value](#)

A yellow callout box with a red border points to the SetID field, containing the text: **Always leave SetID as State.**

Independent Student Exercise 2.2

Create a Contract From an Existing Contract

Contract Entry

Contract

SetID STATE Copy From Contract Contract Version

Contract ID 42700-023-12122-0001 Version 1 Status Current

*Status Open Approval Due Date

Administrator/Buyer PSMITH01 Add a Document

▼ Header

*Contract Style Agency - Services

Process Option General Contract

*Supplier 400WASTE&S-001 Supplier Search

*Supplier ID 0000540388 400 WASTE & SCRAP LLC

Primary Contact

Supplier Contract Ref

Description TRASH REMOVAL

Master Contract ID

*Begin Date 07/01/2021

Expire Date 06/30/2022

Renewal Date

Control Type

Currency USD

Tax Exempt Tax Exempt ID STATE OF GEORGIA

Auto Default Fiscal Year 2022

Lock Chartfields

Group

Type

Rate Date 06/08/2022 CRRNT

Must Use Contract Rate Date

Allow Multicurrency PO

Multi-Agreement

Initial Period

Non-PO Contract

Renewals

▼ Invoice Options

Invoice Number

AP Business Unit

Accounting Template

Payment Terms ID

Basis Date Type

Gross Amount 0.00 USD

Freight Amount 0.00

Misc Charge Amount 0.00 Miscellaneous Charges

Sales Tax Amount 0.00

VAT Amount 0.00

▼ Amount Summary

Maximum Amount 12000 USD

Header

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.

Independent Student Exercise 2.2

Create a Contract From an Existing Contract



Scenario: Pete Smith needs to enter the Line information for the Trash Removal contract he is importing into Team Georgia Marketplace™ Supplier Contracts Management.

Independent Student Exercise 2.2

Create a Contract From an Existing Contract

Enter the Line information.

Line	Item	Description	UOM	Category	Merchandise Amt	Include for Release	Status
1		TRASH REMOVAL	MON	95896	1000	<input checked="" type="checkbox"/>	Active

Lines

Enter the Description

The UOM—using the look-up if needed

Then enter the Category CD (NIGP Code)—using the look-up if needed

Enter the full amount for the line

Click the + to add more lines if needed

Independent Student Exercise 2.2

Create a Contract From an Existing Contract

Contract Entry

Contract

SetID STATE Copy From Contract

Contract ID 42700-023-12122-0001

*Status Open

Contract Version

Version 1 Status Current

Approval Due Date

Administrator/Buyer PSMITH01 PSMITH01

Header

*Contract Style Agency - Services

Process Option General Contract

*Supplier 400WASTE&S-001

*Supplier ID 0000540388 400 WASTE & SCRAP, LLC

Primary Contact

Supplier Contract Ref

Description TRASH REMOVAL

Master Contract ID

*Begin Date 07/01/2021

Expire Date 06/30/2022

Renewal Date

Corporate Contract

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

[Retention](#)
[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)
[Price Adjustment Template](#)
[Purchase Order BU Defaults](#)

Create Document

[Return to Document Search](#)

Source Purchasing Contracts

SetID STATE Contract ID 42700-023-12122-0001

Supplier 400 WASTE & SCRAP, LLC

Contract Style Agency - Services

*Document Type SPD Agency Services Contract

Configurator ID SPD_AGENCY_CNTRCT_SRV SPD - AGENCY STANDARD CONTRACT - Services

*Description Trash Removal

*Administrator PSMITH01 PSMITH01

Sponsor

Department

Use Wizard Responses from Document: (Select Document)

[Internal Contacts/Signers](#)
[External Contacts/Signers](#)
[Document View Access](#)

Independent Student Exercise 2.2

Create a Contract From an Existing Contract

Import Document

SetID STATE Contract ID 42700-023-1212122-0001
Supplier 400 WASTE & SCRAP LLC

Document Type **SPD Agency Services Contract** ▼

Sponsor

*Administrator PSMITH01 PSMITH01

Department

*Description Trash Removal

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

1-1 of 1

Basic Info **Details** |>

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document		1.0	Execut	07/01/2021		<input type="button" value="Upload"/>	<input type="button" value="Clear"/>

Prior Version is not applicable

Independent Student Exercise 2.2

Create a Contract From an Existing Contract

After the contract is imported, it is important to attach ALL of the contract history and award documents.

[Upload another Document Attachment File](#)

Attachments Customize | Find | 1-5 of 5 | Last

Files	Description	
Allow for Email	File Name	Title
<input checked="" type="checkbox"/>	Contract_Assessment_Form.doc	Contract Assessments
<input checked="" type="checkbox"/>	Task_list.doc	Scope of work and duties
<input checked="" type="checkbox"/>	Signed_renewal.doc	Renewals
<input checked="" type="checkbox"/>	Insurance_update.doc	Insurance Certificates
<input checked="" type="checkbox"/>	NOA_Form.doc	NOA

Related Documents Customize | Find | View All | 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			

Contract Documents

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

Independent Student Exercise 2.2

Create a Contract From an Existing Contract

Document Management

SetID STATE Contract ID 42700-023-1212122-0001 [Return to Document Search](#)

Supplier 400 WASTE & SCRAP LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description Trash Removal

Administrator PSMITH01

Sponsor Department

Version 1.00 Created On 07/01/21 12:00AM [Document Details](#)

Status Executed Last Modified On 06/08/22 3:12PM

Executed On 07/01/21 12:00:00AM

[Reset to Dispatch](#)

[Create Amendment](#)

Imported Document

View and Edit Options:

[View Document](#)

[Add Attachments/Related Documents](#)

Review and Approval:

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Attachments and Related Documents

SetID STATE Contract ID 42700-023-1212122-0001

Supplier 400 WASTE & SCRAP LLC

[Upload another Document Attachment File](#)

Attachments

Allow Email/Dispatch	File Name	Title	View	Delete
<input checked="" type="checkbox"/>	Notice_of_Award_(1).doc	Notice of Award	View	-

Related Documents

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

OK Cancel

Independent Student Exercise 2.2

Create a Contract From an Existing Contract

Document Management

SetID STATE Contract ID 42700-023-1212122-0001 [Return to Document Search](#)

Supplier 400 WASTE & SCRAP LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description Trash Removal

Administrator PSMITH01

Sponsor Department

Version 1.00 Created On 07/01/21 12:00AM [Document Details](#)

Status Dispatched Last Modified On 06/08/22 3:20PM

[Redispatch](#)

[Execute Contract](#)

Imported Document

View and Edit Options:

[View Document](#)

[Edit Document](#)

[Modify Attachments/Related Documents](#)

[Document Version History](#)

Review and Edit Options:

[Internal Contract](#)

[External Contract](#)

[Document Version History](#)

Contract Entry

Contract

SetID STATE Contract ID 42700-023-1212122-0001

*Status

Contract Version

Version 1 Status Current

Approval Due Date

Administrator/Buyer PSMITH01 PSMITH01

▼ **Authored Document**

Authored Status Dispatched [Maintain Document](#)

Document Version 1.00 Sponsor

Description Trash Removal Department

Amendment 0 Created Date/time 07/01/2021 12:00AM

Document Administrator PSMITH01 Last modified date 06/08/2022 3:20PM

Lesson 2: Summary



Find an Existing
Value
(Pest Control)



Creating Contract
from Sourced
Event
(Trash Removal)



Thresholds &
Notifications

KNOWLEDGE CHECK

Respond in the Chat Box

1. After creating a contract in Team Georgia Marketplace™, you need to return to the Header page and set the status of the system to:
 - a) Open
 - b) Available
 - c) Approved
 - d) Read
 - e) Accepted

2. In Team Georgia Marketplace™, when creating a contract from a Sourcing Event, you must enter all or part of the _____. This is generated when the Sourcing Event is awarded.
 - a) Requisition ID
 - b) Vendor ID
 - c) Contract ID
 - d) Master Contract ID
 - e) Ad Hoc Document ID



Enterprise Learning



Department of Administrative Services
Improving efficiency, compliance and workforce performance

Lesson Three: Agreement Codes

Lesson 3: Team Georgia Marketplace™ Sourced Contracts

Agreement Codes

Agreement codes are used to gather information, documents or agreements that were made on a contract. Placing agreement codes on a contract allows for easy tracking.

Agreement codes are already in the system, however if you want to set up an agreement code that is specific to your entity you can by contacting procurementhelp@doas.ga.gov.



Lesson 3 - Exercise 3.0

Adding Agreement Codes

Contract Entry

Contract

SetID STATE

Contract ID 42700-023-12121-0001

***Status** Open

Contract Version

Version 1

Status Current

Approved Date 06/08/2022

Administrator/Buyer PSMITH01

PSMITH01

▼ **Authored Document**

Authored Status Executed

Document Version 1.00

Description Unnamed Security

Amendment 0

Document Administrator PSMITH01

Sponsor

Department

Created Date/time 07/01/2021 12:00AM

Last modified date 06/08/2022 11:51AM

▼ **Header** ?

*Contract Style Agency - Services

Process Option General Contract

*Supplier GASECURITY-003

*Supplier ID 0000041257

GEORGIA SECURITY SYSTEMS INC

Primary Contact

Supplier Contract Ref

Description Unnamed Security

Master Contract ID

*Begin Date 07/01/2022

Expire Date 06/30/2023

Renewal Date

Maintain Document

Edit Comments

Contract Activities

Primary Contact Info

Contract Header Agreement

Contract Releases

Retention

Activity Log

Document Status

Thresholds & Notifications

Price Adjustment Template

Purchase Order BU Defaults

Corporate Contract

Lesson 3- Exercise 3.0

Adding Agreement Codes

SLA Header Help

Contract Entry

Contract Header Agreement Assignments

SetID STATE Contract Status Open Version 1
Contract ID 42700-023-12121-0001 Unarmed Security Begin Date 07/01/2022
Supplier GASESECURITY-003 Expire Date 06/30/2023

Agreements 1 of 1 View All

*Sequence 10 Include In Contract Document + -

*Agreement Code **BONDS** Compliance Status **Not Set**

*Description Current Bond Information Provided

*Result Type Yes/No

Negotiated Result No

Target Date 07/01/2022

Notification Comments N
253 characters remaining

Financial Implication \$36,000.00

[Clause Assignments](#) [Notification Assignments](#)

Verification Steps

Details Comments

*Step	Description	*Step Owner	*Verification Method	*Due/Start Notify Date	Activity Status		
10		PSMITH01	On Line Verification with Y/N	06/08/2022	Not Started	+	-

OK... Cancel

Lesson 3- Exercise 3.0

Adding Agreement Codes

Contract Entry

Contract Header Notification Assignments

SetID STATE Contract Status Open
Contract ID 42700-023-12121-0001 Unarmed Security
Supplier GASECURITY-003
Agreement Sequence 10 Current Bond Information Provided
Agreement Code BONDS

Version 1
Begin Date 07/01/2022
Expire Date 06/30/2023

Notification

1-1 of 1 | View All

Sequence	*Notification Type	Verify Step	*User Type	Allow Updates	Recipient Name	User ID	Specify Email	*Email Address		
10	Verification Step	10	Interna	<input type="checkbox"/>	J MORTON01	JMORTON01	<input checked="" type="checkbox"/>	JOHN.MORTON@DOA:	+	-

OK...

Cancel

Lesson 3 -Exercise 3.0: Team Georgia Marketplace™ Adding agreement codes to contract header for e-Verify and Insurance Bonds.

Contract Entry New window | Help

Contract

SetID	STATE	Contract Version	
Contract ID	42700-023-12121-0001	Version	1
*Status	Open	Status	Current
		Approved Date	06/08/2022
Administrator/Buyer	PSMITH01		
	PSMITH01		

▼ **Authored Document**

Authored Status	Executed	Maintain Document	
Document Version	1.00	Sponsor	
Description	Unnamed Security	Department	
Amendment	0	Created Date/time	07/01/2021 12:00AM
Document Administrator	PSMITH01	Last modified date	06/08/2022 11:51AM

▼ **Header** ?

*Contract Style	Agency - Services	
Process Option	General Contract	
*Supplier	GASECURITY-003	Supplier Search
*Supplier ID	0000041257	Edit Comments
Primary Contact		Contract Activities
	GEORGIA SECURITY SYSTEMS INC	Primary Contact Info
		Contract Header Agreement
		Contract Releases

Lesson 3 - Exercise 3.0

Adding Agreement Codes

Agreements Q | 1 of 1 | View All

***Sequence** **Include In Contract Document** + -

***Agreement Code** Q **Compliance Status** ▾

***Description**

***Result Type** ▾

Negotiated Result ▾

Target Date 📅

Notification Comments 📄 📄

253 characters remaining

Financial Implication 📄 📄

[Clause Assignments](#) [Notification Assignments](#)

Verification Steps

Lesson 3 - Exercise 3.0

Adding Agreement Codes

Contract Entry

Contract

SetID STATE **Contract Version**

Contract ID 42700-023-12121-0001 Version 1 Status Current

*Status Open Approved Date 06/08/2022

Administrator/Buyer PSMITH01 PSMITH01

▼ Authored Document

Authored Status Executed [Maintain Document](#)

Document Version 1.00 Sponsor

Description Unarmed Security Department

Amendment 0 Created Date/time 07/01/2021 12:00AM

Document Administrator PSMITH01 Last modified date 06/08/2022 11:51AM

▼ Header ?

*Contract Style Agency - Services

Process Option General Contract

*Supplier GASECURITY-003 [Supplier Search](#)

*Supplier ID 0000041257 [GEORGIA SECURITY SYSTEMS INC](#)

Primary Contact

Supplier Contract Ref

Description Unarmed Security

[Edit Comments](#)

[Contract Activities](#)

[Primary Contact Info](#)

[Contract Header Agreement](#)

[Contract Releases](#)

[Retention](#)

[Activity Log](#)

Agreements

*Sequence 10 Include In Contract Document

*Agreement Code BONDS Compliance Status Not Set

*Description Current Bond Information Provided

*Result Type Yes/No

Negotiated Result No

Target Date 07/01/2022

Notification Comments N

253 characters remaining

Financial Implication \$36,000

[Clause Assignments](#)

[Notification Assignments](#)

Verification Steps

Lesson 3 - Exercise 3.0

Adding Agreement Codes

Contract Entry

Contract Header Notification Assignments

SetID STATE Contract Status Open
Contract ID 42700-023-12121-0001 Unarmed Security
Supplier GASECURITY-003
Agreement Sequence 20 Current Insurance Certificate Provided
Agreement Code INSURANCE

Version 1
Begin Date 07/01/2022
Expire Date 06/30/2023

Notification

1-1 of 1 | View All

Notification Details

Sequence	*Notification Type	Verify Step	*User Type	Allow Updates	Recipient Name	User ID	Specify Email	*Email Address		
10	Verification Step	20	Interna	<input type="checkbox"/>	J MORTON01	JMORTON01	<input checked="" type="checkbox"/>	JOHN.MORTON@DOA!	+	-

OK... Cancel

Lesson 3 - Exercise 3.0

Adding Agreement Codes

Contract Entry

Contract Header Notification Assignments

SetID STATE Contract Status Open Version 1
Contract ID 42700-023-12121-0001 Unarmed Security Begin Date 07/01/2022
Supplier GASECURITY-003 Expire Date 06/30/2023
Agreement Sequence 20 Current Insurance Certificate Provided
Agreement Code INSURANCE

Notification

Notification **Details** ||▶

Sequence	*Notification Type	Verify Step	Notify On Status Change	Reminder Number Of Days Prior	Final Reminder Days	Passed Target Date		
10	Verification Step ▼	20 🔍	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input data-bbox="2076 935 2127 978" type="button" value="+"/>	<input data-bbox="2153 935 2204 978" type="button" value="-"/>

Lesson 3 - Exercise 3.0

Adding Agreement Codes

Contract Entry

Contract Header Notification Assignments

SetID STATE Contract Status Approved Version 1
Contract ID 42700-023-12121-0001 Unarmed Security Begin Date 07/01/2022
Supplier GASECURITY-003 Expire Date 06/30/2023
Agreement Sequence 20 Current Insurance Certificate Provided
Agreement Code INSURANCE

Notification

1-1 of 1 | View All

Sequence	*Notification Type	Verify Step	Notify On Status Change	Reminder Number Of Days Prior	Final Reminder Days	Passed Target Date
10	Verification Step	10	<input type="checkbox"/>	30	10	<input type="checkbox"/>

OK...

Cancel

Lesson 3 - Exercise 3.0

Adding Agreement Codes

Contract Entry

Contract

SetID	STATE	Contract Version		
Contract ID	42700-023-12121-0001	Version	1	Status Current
*Status	Approved	Approval Due Date		

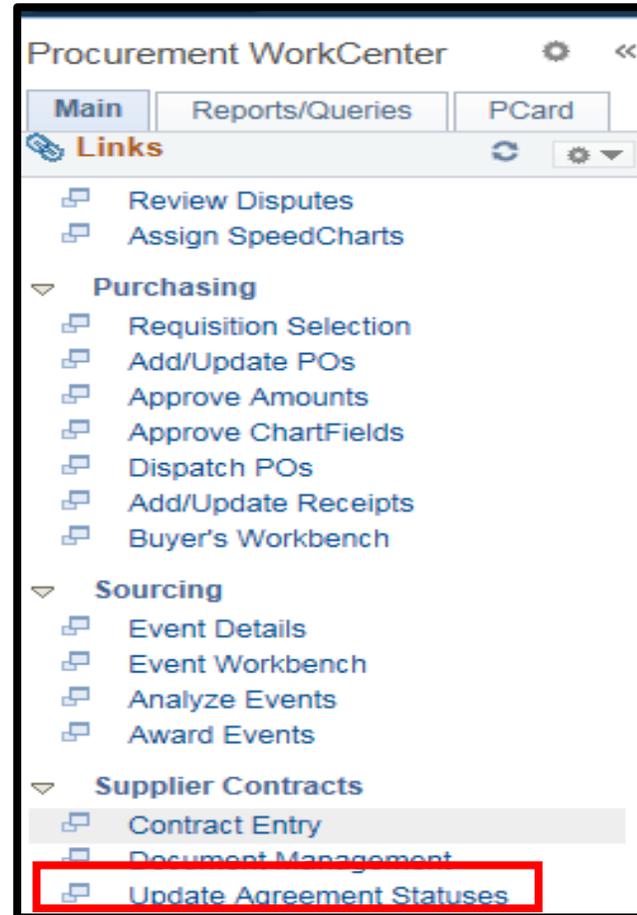
Administrator/Buyer PSMITH01 PSMITH01 [Add a Document](#)

▼ **Header** ?

Contract Style	Agency - Services	
Process Option	General Contract	
Supplier	GASECURITY-003	
Supplier ID	0000041257	<u>GEORGIA SECURITY SYSTEMS INC</u>
Primary Contact		
Supplier Contract Ref		
Description	Unnamed Security	
Master Contract ID		
Begin Date	07/01/2022	
Expire Date	06/30/2023	
Renewal Date		
Control Type	<input checked="" type="checkbox"/> Tax Exempt	
	<input type="checkbox"/> Auto Default	Tax Exempt ID STATE OF GEORGIA
	<input type="checkbox"/> Lock Chartfields	Fiscal Year 2022
		Group
		Currency USD
		Rate Date 06/13/2022 CRRNT
		<input checked="" type="checkbox"/> Corporate Contract

Lesson 3 - Exercise 3.0

Adding Agreement Codes



Lesson 3 - Exercise 3.0

Adding Agreement Codes

Search Criteria

SetID

Contract ID

Item Line

Category Line

*Results to Include

Verification Step Owner

Compliance Status

Agreements Retrieved

1-2 of 2 | View All

SetID	Contract	Agreement Sequence and Code	Agreement Description	Compliance Status
STATE	42700-023-12121-0001 - HEADER	10 - BONDS	Current Bond Information Provided	Not Set
STATE		20 - INSURANCE	Current Insurance Certificate Provided	Not Set

Lesson 3 - Exercise 3.0

Adding Agreement Codes

Update Agreement Statuses

SetID STATE Contract Status Approved
Contract ID 42700-023-12121-0001 Unarmed Security
Supplier ID 0000041257 GEORGIA SECURITY SYSTEMS INC

Version 1
Begin Date 07/01/2022
Expire Date 06/30/2023

Contract Agreements

1 of 1 | View All

Sequence	20	<input checked="" type="checkbox"/> Include In Contract Document
Agreement Code	INSURANCE	Compliance Status <input type="text" value="Not Set"/>
Description	Current Insurance Certificate Provided	
Last User to Update	ROBEMAR	Last Update 02/22/2019 11:32AM
Result Type	Yes/No	
Negotiated Result	Yes	
Actual Result	<input type="text"/>	
Target Date	07/01/2022	
Notification Comments	<input type="text"/>	
Financial Implication	254 characters remaining	
Compliance Comments	<input type="text"/>	

[Send E-mail](#)

[Contract Step Verification](#)

Lesson 3 - Exercise 3.0

Adding Agreement Codes

Contract Verification Details

SetID	STATE	Contract Status	Approved	Version	1
Contract ID	42700-023-10404-0001	UNARMED SECURITY SERVICES		Begin Date	07/01/2016
Supplier ID	0000507997 NT SECURITY LLC			Expire Date	06/30/2017
Agreement Sequence	20				
Agreement Code	DOE_INSURANCE	Current Insurance Certificate Provided			

Verification Steps Find | View All First 1 of 2 Last

Verification Step	10	Send E-mail
Description	Upload copy of insurance certificate	
Due Date	07/01/2016	Step Owner PSMITH04
*Activity Status	<input type="text" value="Not Started"/>	Method Attaching Supporting Document
Notification Comments	<input type="text" value=""/> 254 characters remaining	

[Upload a File](#)

Lesson 3 - Exercise 3.0

Adding Agreement Codes

Contract Verification Details

SetID	STATE	Contract Status	Approved	Version	1
Contract ID	42700-023-10404-0001	UNARMED SECURITY SERVICES		Begin Date	07/01/2016
Supplier ID	0000507997	NT SECURITY LLC		Expire Date	06/30/2017
Agreement Sequence	20				
Agreement Code	DOE_INSURANCE	Current Insurance Certificate Provided			

Verification Steps Find | View All First 2 of 2 Last

Verification Step	20	Send E-mail	
Description	Verify certificate is valid		
Due Date	07/01/2016	Step Owner	PSMITH04
*Activity Status	Completed	Method	On Line Verification with Y/N
Yes/No Verification	Yes		
Notification Comments	I verified with Insurance Company		
	221 characters remaining		

Upload a File

OK Cancel

Lesson 3 - Exercise 3.0

Adding Agreement Codes

Update Agreement Statuses

SetID	STATE	Contract Status	Approved	Version	1
Contract ID	42700-023-10404-0001	UNARMED SECURITY SERVICES		Begin Date	07/01/2016
Supplier ID	0000507997	NT SECURITY LLC		Expire Date	06/30/2017

[Maintain Document](#)

Contract Agreements

Find | View All First 1 of 1 Last

Sequence	20	<input type="checkbox"/> Include In Contract Document
Agreement Code	DOE_INSURANCE	Compliance Status Not Set
Description	Current Insurance Certificate Provided	
Result Type	Yes/No	
Negotiated Result	Yes	
Actual Result	<input type="text"/>	
Target Date	07/01/2016	
Notification Comments	<input type="text" value="A current insurance certificate must be provided"/> 206 characters remaining	
Financial Implication	<input type="text"/>	
Compliance Comments	<input type="text"/>	

[Send E-mail](#) [Contract Step Verification](#)

[Save](#) [Return to Contract Status Search](#)

Lesson 3 - Exercise 3.0

Adding Agreement Codes

Update Agreement Statuses

Saved

SetID	STATE	Contract Status	Approved	Version	1
Contract ID	42700-023-10404-0001	UNARMED SECURITY SERVICES		Begin Date	07/01/2016
Supplier ID	0000507997	NT SECURITY LLC		Expire Date	06/30/2017

[Maintain Document](#)

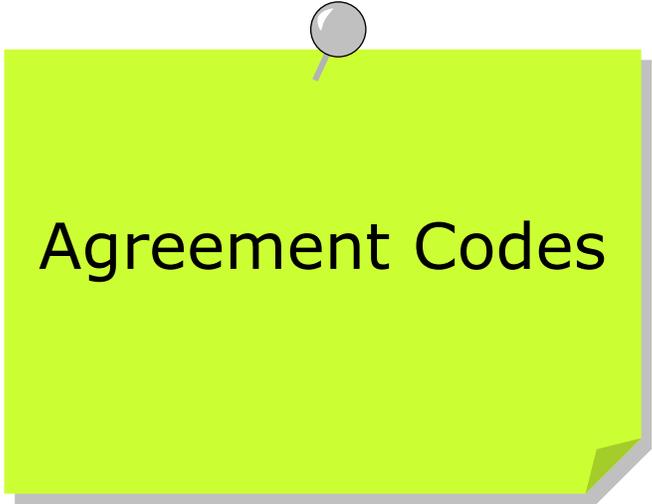
Contract Agreements Find | View All First ◀ 1 of 1 ▶ Last

Sequence	20	<input type="checkbox"/> Include In Contract Document
Agreement Code	DOE_INSURANCE	Compliance Status Compliant ▼
Description	Current Insurance Certificate Provided	
Last User to Update	JMORTON04	Last Update 07/18/2018 11:58AM
Result Type	Yes/No	
Negotiated Result	Yes	
*Actual Result	Yes ▼	
Target Date	07/01/2016	
Notification Comments	<input type="text" value="A current insurance certificate must be provided"/> <small>206 characters remaining</small>	
Financial Implication		
Compliance Comments	<input type="text"/>	

[Send E-mail](#) [Contract Step Verification](#)

[Save](#) [Return to Contract Status Search](#)

Lesson 3: Summary



Agreement Codes

Poll Question

What is the purpose of Agreement Codes?

- a) Reminder and verification that the criteria have been met
- b) The Buyer and Contract Administrator agree on payment methods
- c) Requires a designee who will receiving the notifications
- d) A & C



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Lesson Four: Create a Contract Template

INDEPENDENT STUDENT EXERCISE

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

Contract

SetID STATE Copy From Contract

Contract ID 42700-023-10405-0001 Version 1

*Status Open

Administrator/Buyer JMORTON04 JMORTON04

Header

*Contract Style Buyer JMORTON04

Process Option General Contract

*Supplier AIR&WASTEM-00 Supplier Search

*Supplier ID 0000037565 AIR & WASTE MANAGEMENT ASSOCIATION

*Begin Date 07/01/2016

Expire Date 06/30/2017

Renewal Date

Currency USD CRRNT

Primary Contact Contact

Name:

Supplier Contract Ref

Description TRASH REMOVAL

Master Contract ID

Tax Exempt ID STATE OF GEORGIA

Tax Exempt

Fiscal Year 2017

Amount Summary

Maximum Am

Line Item Released Am

Category Released Am

Open Item Released Am

Total Released Am

Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date 07/18/2018

Corporate Contract Adjust Supplier Pricing First Auto Default Group

Lock Chartfields Price Can Be Changed on Order

PO Defaults Add Open Item Price AdjustmentsPrice Adjustment Template

Initial Period Renewals

Non-Profit Multi-Agreement Type

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 Date Type Misc Charge Amount 0.00

Miscellaneous Charges Retention

Specify purchase order information that will be used to create a new purchase order. The purchase order will be used for all purchase order releases generating from, and referencing, this contract.

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines Personalize | Find | View All |

Details | Order By Amount | Item Information | Default Schedule | Release Amounts | Release Quantities | Line Groupings | Spend Threshold |

Line	Item	Description	UOM	Category	Merchandise Amt	Include for Release	Status
		Trash Removal	ION	95896	1000	<input checked="" type="checkbox"/>	Active

View Category Hierarchy Category Search

Contract Categories

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

Details | Pricing Options | Release Amounts | Spend Threshold |

Line	Category	Description	Status
1			Active

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

Contract Entry
Contract

SetID STATE Contract Version

Contract ID 42700-023-10405-0001 Version 1 Status Current

*Status Open Approval Due Date

Administrator/Buyer JMORTON04 JMORTON04 **Add a Document**

Header

*Contract Style Agency - Services Buyer JMORTON04

Process Option General Contract Add Comments Activity Log

*Supplier AIR&WASTEM-00 Supplier Search Contract Activities Document Status

*Supplier ID 0000037565 AIR & WASTE MANAGEMENT ASSOCIATION Primary Contact Info Thresholds & N

*Begin Date 07/01/2016 Contract Header Agreement

Expire Date 06/30/2017 Contract Releases

Renewal Date Currency USD CRRNT

Primary Contact Contact

Supplier Contract Ref Name:

Description TRASH REMOVAL

Master Contract ID

Tax Exempt ID STATE OF GEORGIA

Tax Exempt

Fiscal Year 2017

Amount Summary

Maximum Amount

Line Item Released Amount

Category Released Amount

Open Item Released Amount

Total Released Amount

Create Document

Source Purchasing Contracts Return to Document Search

SetID STATE Contract ID 42700-023-10405-0001

Supplier AIR & WASTE MANAGEMENT ASSOCIATION

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Configurator ID SPD_AGENCY_CNTRCT_SRV SPD - AGENCY STANDARD CONTRACT - Services

*Description TRASH REMOVAL

*Administrator JMORTON04 JMORTON04

Sponsor

Department

Use Wizard Responses from Document: (Select Document)

Create Document Import Document

Save

Internal Contacts/Signers

External Contacts/Signers

Document View Access

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

Wizard Execution

Wizard Execute - Document Creation

Wizard ID SPD_AGENCY_CNTRCT Description SPD Agency Contract for Goods

Question Groups First 1 of 1

Question Group SPD_AGENCY_CNTRCT Previous Finish

Questions

What type of contract are you creating? Services

What is the solicitation title for this contract? Trash Removal
241 characters remaining

What is the solicitation number for this contract? 1234

What State Entity is this contract for? DHS
251 characters remaining

How many options to renew for one-year terms? 4 one-year options to renew

Is a performance bond required? If no, insert -None-. If so, insert the dollar amount of the performance OR refer to the solicitation if the performance bond amount fluctuates or cannot otherwise be easily described (e.g. As Required by the RFX) None

Is the agency requiring one or more bonds other than a performance bond? If not, please insert 'None'. If so, please insert the bond type and dollar amount (e.g. Fidelity Bond of \$100,000) OR simply state -As Required by the RFX-. As required by eRFx

Who is the issuing officer? JMORTON04

Who is the authorized person to receive contract notices for the contractor?
254 characters remaining

Total Financial Obligation of the Agency for the First Fiscal Year: TBD

Total Financial Obligation of the Agency for each Renewal Period if Renewed: TBD

Previous Finish

* Required Question
^Navigational Question

Cancel Save for Later

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

Favorites ▾ | Main Menu ▾ > Supplier Contracts ▾ > Create Contracts and Documents ▾ > Contract Entry

TeamWorks FS91 TRN Home | Worklist | Add to Favorites | Sign out

New Window | Help | Personalize Page

Document Management

SetID: STATE Contract ID: 42700-023-53243-0001 [Return to Document Search](#)

Vendor: ABATE WASTE LLC

Document Type: SPD Agency Services Contract

Description: TRASH REMOVAL

Administrator: PSMITH42

Sponsor: Department:

Version: 0.00 Created On: 09/26/16 3:16PM [Document Details](#)

Status: Draft Last Modified On: 09/26/16 3:08PM

View and Edit Options:

- [View Document](#)
- [Edit Document](#)**

[Add Attachments/Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

Review and Approval:

- [Route Internally](#)
- [Preview Approval](#)
- [Submit for Approval](#)
- [Bypass Approvals](#)

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Other Document Actions:

- [Send to Contacts](#)
- [Refresh Document](#)
- [Recreate Document](#)
- [Deactivate Document](#)

[Generation Log](#)

Windows Media Player

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

The screenshot displays a web application interface for document management. The browser address bar shows the URL: https://tgmprn.state.ga.us/psp/fs91trn_6/EMPLOYEE/ERP/c/CONTRACT_MGMT.CS_DOC_MAINT.GBL?Action=U&page=CS_DOC_MAINT&CS_DOC_ID=18317. The page title is "TeamWorks FS91 TRN". The breadcrumb navigation is: Main Menu > Supplier Contracts > Create Contracts and Documents > Contract Entry. The page includes a navigation bar with "Home", "Worklist", "Add to Favorites", and "Sign out".

Document Management [Return to Document Search](#)

SetID:	STATE	Contract ID:	42700-023-53243-0001	
Vendor:	ABATE WASTE LLC			
Document Type:	SPD Agency Services Contract			
Description:	TRASH REMOVAL			
Administrator:	PSMITH42	Department:		
Sponsor:				

Version:	0.00	Created On:	09/26/16 3:16PM	Document Details
Status:	Draft	Last Modified On:	09/26/16 3:19PM	
		Checked Out On:	09/26/16 3:19PM	
		Checked Out By:	PSMITH01	

View and Edit Options:	Review and Approval:	Other Document Actions:
View Document	Internal Contacts/Signers	Generation Log
Check In	External Contacts/Signers	
Cancel Check Out	Document View Access	

[Add Attachments/Related Documents](#)
[Document Modification Summary](#)
[Document Version History](#)

STATE_42700-023-....x... [Show all](#) X

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

State of Georgia		
Agency Standard Contract Form		
Solicitation Title Trash Removal	Solicitation Number 1234	Contract Number 42700-023-12122-0001
1. This Contract is entered into between the Agency and the Contractor named below:		
Agency's Name - (hereafter called Agency) Department Human Services		
Contractor's Name - (hereafter called Contractor) ABATE WASTE LLC		
2. Contract to Begin: July 01, 2016	Date of Completion: June 30, 2017	Renewals: 4 one-year options to renew
3. Performance Bond, if any: None		Other Bonds, if any: "As required by eRFx"
4. Maximum Amount of this Contract: 12000	Total Financial Obligation of the Agency for the First Fiscal Year: TBD	Total Financial Obligation of the Agency for each Renewal Period if Renewed: TBD
5. Authorized Person to Receive Contract Notices for Agency: Paul Smith		Authorized Person to Receive Contract Notices for Contractor:
6. The parties agree to comply with the terms and conditions of the following attachments which are by this reference made a part of the Contract: Attachment 1 - Agency Standard Contract Terms and Conditions for Services Attachment 2 - Solicitation (referenced above) Attachment 3 - Contractor's Final Response		
IN WITNESS WHEREOF, this Contract has been executed by the parties hereto.		
7. Contractor		
Contractor's Name (If other than an individual, state whether a corporation, partnership, etc.) ABATE WASTE LLC		
By (Authorized Signature)	Date Signed	
Printed Name and Title of Person Signing		
Address 3250 PENNSYLVANIA AVENUE EAST POINT, GA 30344		
8. Agency		
Agency Name Department Human Services		
By (Authorized Signature)	Date Signed	
Printed Name and Title of Person Signing PSMITH		
Address		

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

Favorites ▾ | Main Menu ▾ > Supplier Contracts ▾ > Create Contracts and Documents ▾ > Contract Entry

TeamWorks FS91TRN Home | Worklist | Add to Favorites | Sign out

New Window | Help | Personalize Page

Document Management

[Return to Document Search](#)

SetID:	STATE	Contract ID:	42700-023-53243-0001
Vendor:	ABATE WASTE LLC		
Document Type:	SPD Agency Services Contract		
Description:	TRASH REMOVAL		
Administrator:	PSMITH42		
Sponsor:	Department:		

Version:	0.00	Created On:	09/26/16 3:16PM	Document Details
Status:	Draft	Last Modified On:	09/26/16 3:19PM	
		Checked Out On:	09/26/16 3:19PM	
		Checked Out By:	PSMITH01	

View and Edit Options:	Review and Approval:	Other Document Actions:
View Document	Internal Contacts/Signers	Generation Log
Check In	External Contacts/Signers	
Cancel Check Out	Document View Access	

[Add Attachments/Related Documents](#)
[Document Modification Summary](#)
[Document Version History](#)

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

Favorites ▾ Main Menu ▾ > Supplier Contracts ▾ > Create Contracts and Documents ▾ > Contract Entry

Home | Worklist | Add to Favorites | **Sign out**

TeamWorks FS91TRN

New Window | Help | Personalize Page

Check In Document

Select the desired versioning option and enter a brief description describing the changes. Click the OK button to proceed and you will then be prompted to enter the filename for where the file you are checking in resides.

SetID: STATE Contract ID: 42700-023-53243-0001

Vendor: ABATE WASTE LLC

Version:

- Minor Version (0.01)
- Major Version (1.00)

*Comments:

Check In:original contract template provided for sourcing event

OK Cancel

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

The screenshot displays a document management interface with three columns of actions:

- View and Edit Options:**
 - View Document
 - Edit Document
 - Add Attachments/Related Documents
 - Document Modification Summary
 - Document Version History
- Review and Approval:** (This column is highlighted with a red border in the image)
 - Route Internally
 - Preview Approval
 - Submit for Approval
 - Bypass Approvals
 - Internal Contacts/Signers
 - External Contacts/Signers
 - Document View Access
- Other Document Actions:**
 - Send to Contacts
 - Refresh Document
 - Recreate Document
 - Deactivate Document
 - Generation Log

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

Internal Contacts / Collaborators

SetID STATE Contract ID 42700-023-10608
Supplier PRATT,RASHAWN R

▼ Internal Contact Details Personalize | Find | View All | First 1 of 1 Last

User	Description	Collaborator	Can Edit During Collaboration	Collaboration Status	Date Time
1 JMORTON06		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Initial	

▼ Collaboration Instructions

ATTACHED IS THE CONTRACT TEMPLATE FOR YOUR SOURCING EVENT.

► Collaboration Comments

[Return to Document Management](#)

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

The screenshot shows the 'TeamWorks' interface for document management. The breadcrumb trail is 'Supplier Contracts > Create Contracts and Documents > Contract Entry'. The document ID is 'FS91TRN'. The document details include: SetID: STATE, Vendor: ABATE WASTE LLC, Document Type: SPD Agency Services Contract, Description: TRASH REMOVAL, Administrator: PSMITH42, and Sponsor: [blank]. The status is 'Pending Collaboration'. The 'Created On' and 'Last Modified On' dates are both 09/26/16. The 'Review and Approval' section contains buttons for 'Cancel Collaboration' and 'Modify Collaboration'. The 'View and Edit Options' section includes 'View Document', 'Add Attachments/Related Documents', 'Document Modification Summary', and 'Document Version History'. The 'Other Document Actions' section includes 'Generation Log'.

The 'Cancel Collaboration' dialog box prompts the user to enter a comment/reason for stopping the collaboration loop. The 'Comments' field contains the text: 'Check In: Original contract template provided for sourcing event. Collaboration not required.' The dialog also shows '161 characters remaining' and 'OK' and 'Cancel' buttons.

Lesson 4 – Exercise 4.0

Creating a Contract Template and Collaboration

Document Management

SetID STATE Contract ID 42700-023-10608 [Return to Document Search](#)

Supplier PRATT,RASHAWN R

Contract Style SWC - Service
Document Type SPD Agency Services Contract
Description TRASH REMOVAL
Administrator JMORTON06

Sponsor Department

Version 0.01 Created On 07/19/18 9:49AM
Status Draft Last Modified On 07/19/18 10:17AM

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

Review and Approval:
[Route Internally](#)
[Approve](#)
[Internal Contacts/Signers](#)
[External Contacts/Signers](#)
[Document View Access](#)

[Add Attachments/Related Documents](#)
[Document Modification Summary](#)
[Document Version History](#)

Document Management

SetID STATE Contract ID 42700-023-12122-0002 [Return to Document Search](#)

Supplier 400 WASTE & SCRAP LLC

Contract Style Agency - Services
Document Type SPD Agency Services Contract
Description TRASH REMOVAL
Administrator PSMITH01

Sponsor Department

Version 0.01 Created On 04/16/20 12:03PM
Status Approved Last Modified On 04/16/20 12:34PM [Document Details](#)

[Dispatch](#)

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

Review and Approval:
[Internal Contacts/Signers](#)
[External Contacts/Signers](#)
[Document View Access](#)

Other Document Actions:
[Send to Contacts](#)
[Refresh Document](#)
[Recreate Document](#)
[Compare Documents](#)
[Deactivate Document](#)

[Add Attachments/Related Documents](#)
[Document Modification Summary](#)
[Document Version History](#)

[Generation Log](#)

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

Document Management

[Return to Document Search](#)

SetID: STATE Contract ID: 42700-023-DHS0000202-0001

Vendor: ACTIVE PEST CONTROL OF MIDDLE GA INC

Document Type: SPD Agency Services Contract

Description: 02 Pest Control

Administrator: JMORTON01

Sponsor: Department:

Version: 0.01 Created On: 10/19/16 10:23AM [Document Details](#)

Status: Approved Last Modified On: 10/19/16 10:38AM

Dispatch

View and Edit Options:

[View Document](#)

[Edit Document](#)

[Modify Attachments/Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

Review and Approval:

[Approval Details](#)

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Other Document Actions:

[Send to Contacts](#)

[Refresh Document](#)

[Recreate Document](#)

[Deactivate Document](#)

[Generation Log](#)

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

Dispatch

SetID: STATE Contract ID: 42700-023-DHS0000202-0001
Vendor: ACTIVE PEST CONTROL OF MIDDLE GA INC

Version: 0.01
Administrator: JMORTON01
Email: fscmtst@doas.ga.gov
*Delivery Method: **Manual** (highlighted)
Send as File Type: (dropdown)

Subject: Documents for Review/Signature - Contract ID: 42700-023-DHS0000202-0001

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

Select All Contacts Clear All Contacts

OK (highlighted) Cancel

Dispatch

SetID STATE Contract ID 42700-023-12122-0002
Supplier 400 WASTE & SCRAP LLC

Version 0.01
Administrator PSMITH01
Email
*Delivery Method Email (dropdown)
Send as File Type Adobe PDF (dropdown) **Preview PDF** (button)

Files To Be Sent

- Current Document
- Attachments
- Related Documents
- Set to Checked Out
- Send Copy to Administrator (highlighted)

Subject: Documents for Review/Signature - Contract ID: 42700-023-12122-0002

Description: This email contains documents for contract: STATE / 42700-023-12122-0002.

Selected	Contact ID	Name	Title	Email ID	Description
<input checked="" type="checkbox"/>		PSMITH01	BUSINESS MANAG	PETE.SMITH@DOAS.GA.GC	

Select All Contacts Clear All Contacts

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

Document Management

[Return to Document Search](#)

SetID: STATE Contract ID: 42700-023-DHS0000202-0001

Vendor: ACTIVE PEST CONTROL OF MIDDLE GA INC

Document Type: SPD Agency Services Contract

Description: 02 Pest Control

Administrator: JMORTON01

Sponsor: Department:

Version: 0.01 Created On: 10/19/16 10:23AM [Document Details](#)

Status: Dispatched Last Modified On: 10/19/16 10:41AM

[Redispatch](#)

[Execute Contract](#)

View and Edit Options:

[View Document](#)

[Edit Document](#)

[Modify Attachments/Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

Review and Approval:

[Approval Details](#)

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Other Document Actions:

[Send to Contacts](#)

[Refresh Document](#)

[Recreate Document](#)

[Deactivate Document](#)

[Generation Log](#)

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

Document Management

[Return to Document Search](#)

SetID:	STATE	Contract ID:	42700-023-DHS0000202-0001
Vendor:	ACTIVE PEST CONTROL OF MIDDLE GA INC		
Document Type:	SPD Agency Services Contract		
Description:	02 Pest Control		
Administrator:	JMORTON01		
Sponsor:	Department:		

Version:	0.01	Created On:	10/19/16 10:23AM	Document Details
Status:	Executed	Last Modified On:	10/19/16 10:43AM	
		Executed On:	10/19/16 10:43:14AM	

[Reset to Dispatch](#)

[Create Amendment](#)

View and Edit Options:	Review and Approval:	Other Document Actions:
View Document	Approval Details	Send to Contacts
Modify Attachments/Related Documents	Internal Contacts/Signers	Deactivate Document
Document Modification Summary	External Contacts/Signers	Generation Log
Document Version History	Document View Access	

Lesson 4 - Exercise 4.0

Creating a Contract Template and Collaboration

Contract Entry

Contract

SetID STATE

Contract ID 42700-023-10608

Status **Approved**

Contract Version

Version 1 Status Current

Approved Date 07/19/2018

Administrator/Buyer JMORTON06 JMORTON06

Authored Document

Authored Status Executed Document Version 0.01 Amendment 0 [Maintain Document](#)

Header ?

Contract Style SWC - Service

Process Option General Contract

Supplier PRATTRASHA-002

Supplier ID E000959793 [PRATT,RASHAWN R](#)

Buyer JMORTON06

[Add Comments](#) [Activity Log](#)

[Contract Activities](#) [Document Status](#)

[Primary Contact Info](#) [Thresholds & Notifications](#)

[Contract Header Agreement](#)

[Contract Releases](#)

Begin Date 07/01/2016

Expire Date 06/30/2017

Renewal Date

Currency USD CRRNT

Primary Contact Contact Name:

Supplier Contract Ref

Description TRASH REMOVAL

Master Contract ID

Tax Exempt ID STATE OF GEORGIA

Tax Exempt

Fiscal Year 2017

Amount Summary ?

Maximum Amount	12,000.00 USD
Line Item Released Amount	0.00
Category Released Amount	0.00
Open Item Released Amount	0.00
Total Released Amount	0.00
Remaining Amount	12,000.00
Remaining Percent	100.00

Lesson 4: Summary



Creating Contract
Template &
Collaboration

KNOWLEDGE CHECK

Respond in Chat Box

True or False

1. Manual and Email are the only Delivery Method for sharing contract documents.
 - a) True
 - b) False

2. Wizard Execution creates a contract template
 - a) True
 - b) False

3. If you already have an electronic version of a contract, you can import the document into Supplier Contracts instead of creating a new document.
 - a) True
 - b) False



Enterprise Learning



Department of Administrative Services
Improving efficiency, compliance and workforce performance

Lesson Five: Amending and Modifying Contracts

Lesson Objectives

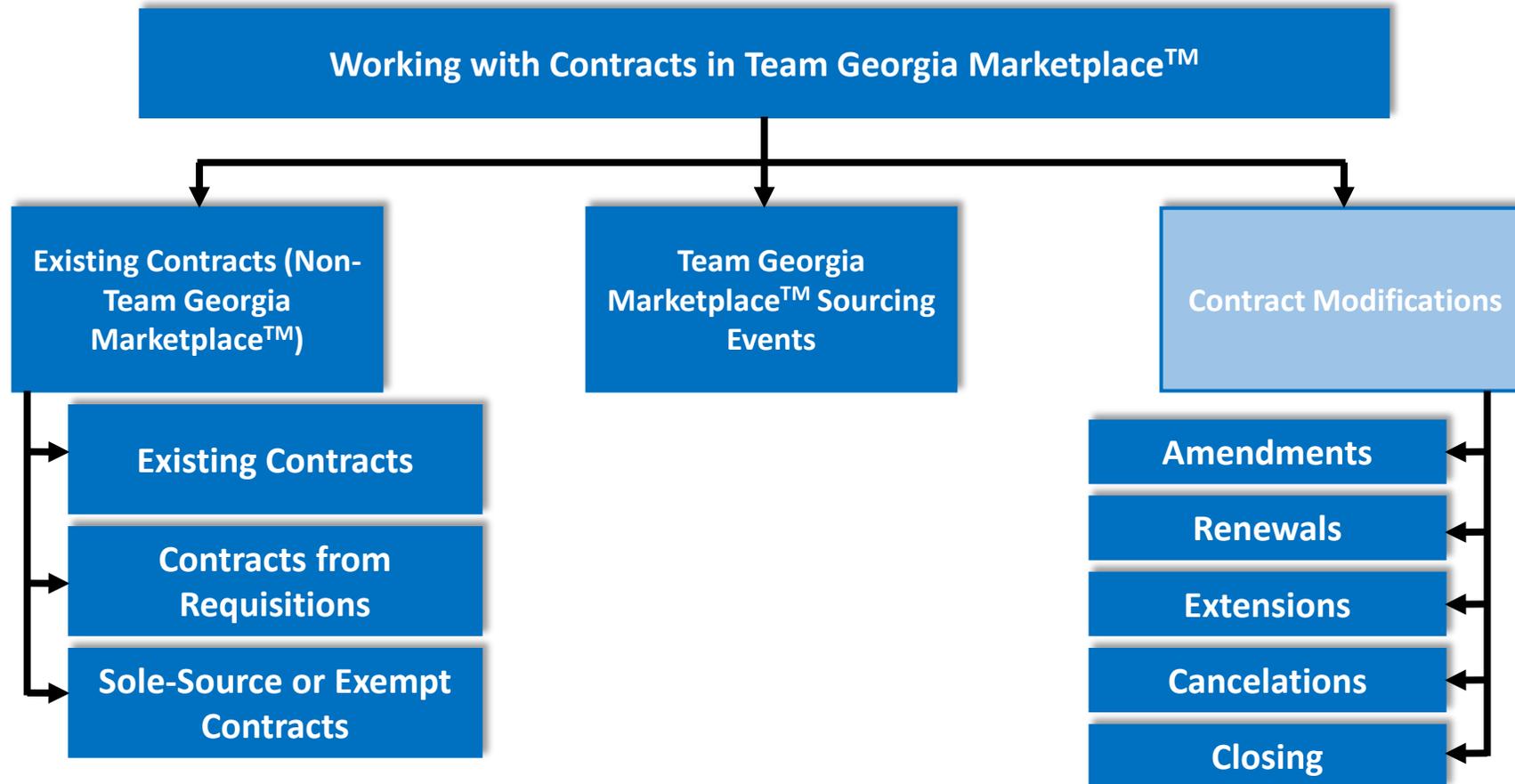
By completing this lesson you will:

- Create amendments to executed contracts
- Renew contracts
- Extend contracts
- Cancel contracts
- Close contracts (previously called expired)



Supplier Contracts – Contract Modifications

Working with contracts in Team Georgia Marketplace™:



Lesson 5: Amending and Modifying Contracts When an Amendment is Needed



Amendment Needed	Amendment Not Needed
Amending or Editing an Executed Contract	
Renewing an Executed Contract	
Extending an Executed Contract	
	Closing an Expired Contract
	Cancelling a Contract for Cause or for Convenience
	Cancelling a Contract due to the results of a protest or due to
	error or supplier has gone out of business

Lesson 5 - Exercise 5.0

Create an Amendment

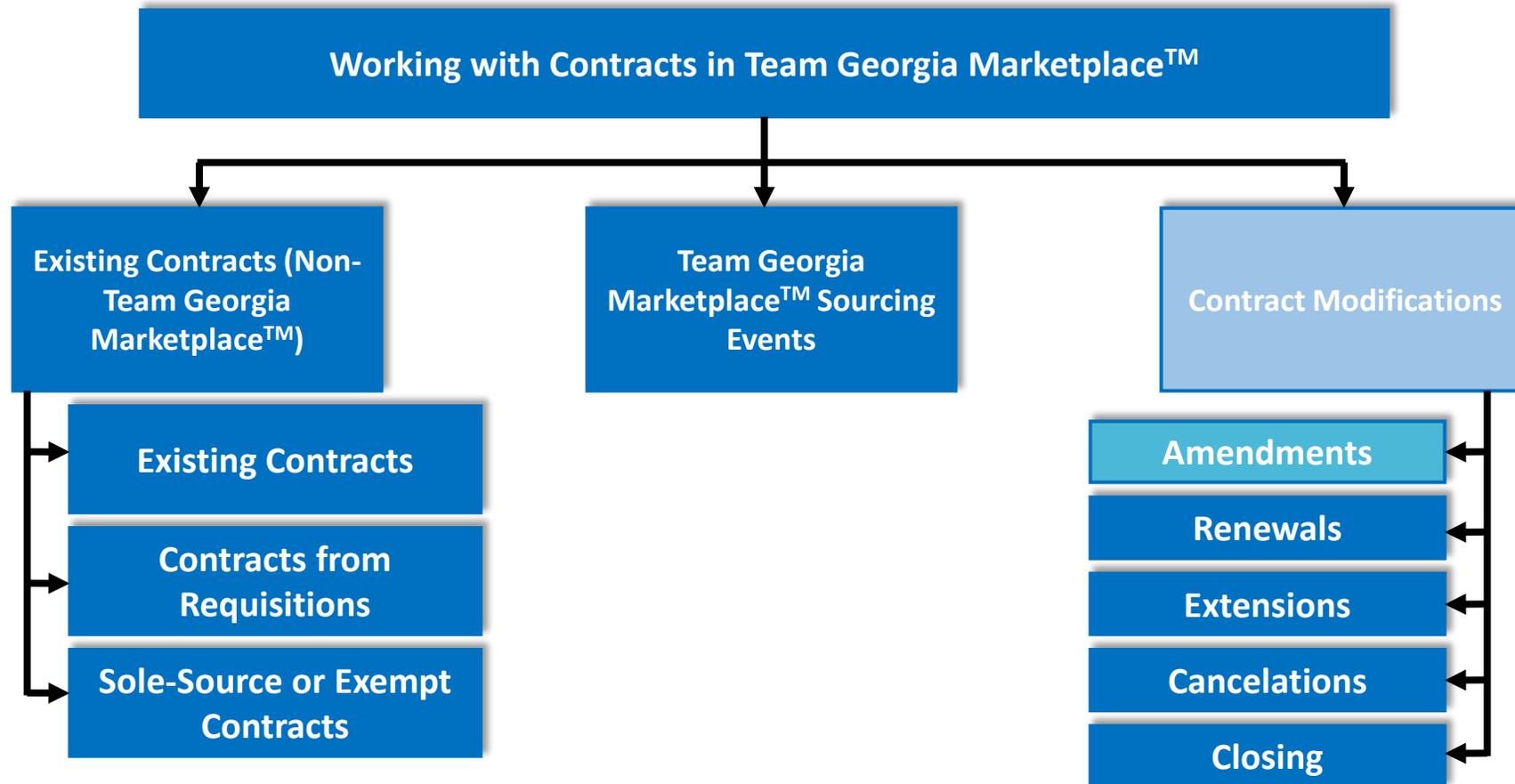


Scenario: Pete Smith needs to amend the newly created Unarmed Security Services contract to include service to a new building that has replaced an old building no longer in use. In addition he needs to add some additional funds to the maximum amount.

Lesson 5 – Exercise 5.0

Create an Amendment

Working with contracts in Team Georgia Marketplace™:



Lesson 5 – Exercise 5.0

Create an Amendment



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

- *Amend Contract Only*: Revision being made to the original contract ---**DO NOT USE**
- *Amend Contract with Amendments*: Generates both a separate amendment file and a copy of the last executed main contract document---**DO NOT USE**

***Amendment File Only*: Generates only the amended file
IT IS RECOMMENDED THAT YOU ALWAYS USE THIS ONE.**

Lesson 5 – Exercise 5.0

Create an Amendment

Return to your executed existing contract

Find an Existing Value | Add a New Value

▼ Search Criteria

SetID = [dropdown] [STATE] x

Contract ID contains [dropdown] 10404

Contract Version = [dropdown]

Version Status = [dropdown]

Contract Process Option = [dropdown]

Supplier ID begins with [input] Q

Short Supplier Name begins with [input] Q

Supplier Name begins with [input] Q

Contract Status = [dropdown]

Master Contract ID begins with [input] Q

Description begins with [input]

Supplier Contract Ref begins with [input]

Corporate Contract = [dropdown]

Contract Style begins with [input] Q

Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All

SetID	Contract ID	Contract Version	Version Status	Contract Process Option	Supplier ID	Short Supplier Name	Supplier Name	Expire Date	Contract Status	Master Contract ID	Description
STATE 48400-265-CSOOURRX110404	1	1	Current	Order	0000013548	GASRAILRO-001	GEORGIA SOUTHWESTERN RAILROAD	05/30/2015	Approved	(blank)	A000543
STATE 42700-023-10404-0001	1	1	Current	General	0000507997	NTSECURITY-001	NT SECURITY LLC	06/30/2017	Approved	(blank)	UNARMED S...
STATE 41900-050-0011110404	1	1	Current	General	0000158548	PERKINELME-003	PERKINELMER HEALTH SCIENCES INC	07/31/2011	Approved	(blank)	REAGENTS & B...
STATE 4190-050-11110404	1	1	Current	General	0000158548	PERKINELME-003	PERKINELMER HEALTH SCIENCES INC	(blank)	Closed	(blank)	REAGENT REN...
STATE 40500-050-14110404	1	1	Current	General	0000158548	PERKINELME-003	PERKINELMER HEALTH SCIENCES INC	06/30/2014	Open	(blank)	(blank)
STATE 40500-050-12110404	1	1	Current	General	0000158548	PERKINELME-003	PERKINELMER HEALTH SCIENCES INC	06/30/2011	Approved	(blank)	REAGENTS AN...

Search options for finding contracts. The Contract Version will always be 1. We are not using Version Status. You can search by Vendor Name in addition to Short Vendor Name.

We can also make our searches Case Sensitive. If this box is checked, the search will look for exactly what is entered.

Return to your existing contract

Lesson 5 - Exercise 5.0

Creating an Amendment

Change the System Status to Open and go to Maintain Document.

Contract Entry

Contract

SetID STATE Contract Version

Contract ID 42700-023-10404-0001 Version 1 Status Current

*Status **Open** Approved Date 07/17/2018

Administrator/Buyer JMORTON04 JMORTON04

▼ Authored Document

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

▼ Header ?

*Contract Style Agency - Services Buyer JMORTON04

Process Option General Contract Edit Comments Activity Log

*Supplier NTSECURITY-001 Supplier Search Contract Activities Document Status

*Supplier ID 0000507997 NT SECURITY LLC Primary Contact Info Thresholds & Notifications

*Begin Date 07/01/2016 Contract Header Agreement

Expire Date 06/30/2017 Contract Releases

Renewal Date

Currency USD CRRNT

Primary Contact Contact

Name:

Supplier Contract Ref

Description UNARMED SECURITY SERVICES

Master Contract ID

Tax Exempt ID STATE OF GEORGIA

Tax Exempt

Fiscal Year 2017

Amount Summary ?

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

Amendments

Set the System Status to Open and SAVE if you need to enter information on the Header or Line and then make the change.

Then click Maintain Document.

Lesson 5 - Exercise 5.0

Creating an Amendment

Click to Create Amendment

New Window

Document Management

SetID STATE Contract ID 42700-023-10404-0001 [Return to Document Search](#)

Supplier NT SECURITY LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description UNARMED SECURITY SERVICES

Administrator JMORTON04

Sponsor Department

Version 1.00 Created On 07/01/16 12:00AM Document Details

Status Executed Last Modified On 07/17/18 11:47AM

Executed On 07/17/18 11:47:28AM

[Reset to Dispatch](#)

[Create Amendment](#)

Imported Document

View and Edit Options:

[View Document](#)

Modify Attachments/Related Documents

Document Version History

Review and Approval:

Internal Contacts/Signers

External Contacts/Signers

Document View Access

Other Document Actions:

[Send to Contacts](#)

[Deactivate Document](#)

Amendments

Lesson 5 – Exercise 5.0

Creating an Amendment



Select Amendment Option, Configurator ID, Major Version or Minor Version 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: SPD_AGENCY_CNT_AMNDT

Version: Reset Version back to 0.00, Minor Version (1.04), Major Version (2.00)

*Comments: Amendment Created: Change to services building and additional maximum amount. 177 characters remaining

OK Cancel

Amendments

1. Select the Amendment Option of Amendment Files Only
2. Select SPD Agency Contract Amendment
3. Indicate if this is a Major or Minor version change. (Almost always an Amendment is a Major Version change)
4. Enter a comment to explain the amendment
5. Click OK

Lesson 5 – Exercise 5.0

Creating an Amendment

The Amendments Document must be attached

The screenshot displays the 'Document Management' interface for a contract. The header includes 'FSTGMTRN' and navigation links like 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. A 'Saved' button is visible in the top right. The main content area shows document metadata: SetID (STATE), Vendor (ABATE WASTE LLC), Document Type (SPD Agency Services Contract), Description (TRASH REMOVAL), Administrator (PSMITH01), and Sponsor. Contract ID is 42700-023-ES12122-0001. Amendment details include Amendment 1, Version 2.00, and Status Draft. Dates for Created On, Amended On, and Last Modified On are provided. A red box highlights the 'Add Attachments/Related Documents' link in the 'View and Edit Options' section. A yellow callout box with a red border points to this link, containing the text 'Please notice the version change.' Other sections include 'Review and Approval' and 'Other Document Actions'.

SetID:	STATE	Contract ID:	42700-023-ES12122-0001
Vendor:	ABATE WASTE LLC		
Document Type:	SPD Agency Services Contract		
Description:	TRASH REMOVAL		
Administrator:	PSMITH01		
Sponsor:		Department:	
Amendment:	1	Created On:	02/01/16 12:00AM
Version:	2.00	Amended On:	02/01/16 11:14AM
Status:	Draft	Last Modified On:	02/01/16 11:15AM

View and Edit Options:

- View Original Document
- View Amendment File
- Edit Amendment File
- Add Attachments/Related Documents**
- Document Modification Summary
- Document Version History

Review and Approval:

- Route Internally
- Preview Approval
- Submit for Approval
- Bypass Approvals
- Internal Contacts/Signers
- Original Contacts/Signers
- Document View Access

Other Document Actions:

- Send to Contacts
- Refresh Document
- Recreate Document
- Import Prior Document
- Deactivate Document
- Generation Log

Amendments

Please notice the version change.

Lesson 5 – Exercise 5.0

Creating an Amendment

Upload the Amendment attachment(s)

Amendments

Attachments and Related Documents Help

SetID STATE Contract ID 42700-023-10404-0001
Supplier NT SECURITY LLC

Upload another Document Attachment File

Attachments Personalize | Find | First 1-2 of 2 Last

Allow Email/Dispatch	File Name	Title	View	Delete
<input checked="" type="checkbox"/>	Notice_of_Award_(1).doc	Notice of Award	View	-
<input checked="" type="checkbox"/>	SPD-CP013ContractAmendmentTemplate.docx	Contract Amendment	View	-

Related Documents Details

Allow Email/Dispatch	Visible to Supplier	*Source Transaction	*SetID	Contract ID	Ad Hoc ID	Business Unit	PO Number	Event ID
<input type="checkbox"/>	<input type="checkbox"/>	Ad Hoc <input type="checkbox"/>	STATE <input type="text"/>	<input type="text"/>	<input type="text"/>	42700 <input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel

Lesson 5 – Exercise 5.0

Creating An Amendment

Review the Document Version History and then Complete the Approval Step to move the Amendment through to the next step.

Amendments

Document Management

SetID STATE Contract ID 42700-023-10404-0001 Return to Document Search

Supplier NT SECURITY LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description UNARMED SECURITY SERVICES

Administrator JMORTON04

Sponsor Department

Version 2.00 Status Draft

Reset to Dispatch

Create Amendment

Imported Document

View and Edit Options:

View Document

Modify Attachments/Related Documents

Document Version History

Review and Appro Internal Contacts/S External Contacts/S Document View Acc

Document History

SetID STATE Contract ID 42700-023-10404-0001

Supplier NT SECURITY LLC

Amendment Option Amendment Files Only

Document Action [Dropdown]

View Source Version History

Return to Document Management

Document History Personalize | Find | View All | [Icons] First 1-6 of 6 Last

Action/Version	Comments	Document Details			
DateTime	Document Action	Last User to Take Action	Version	Amendment	View Attachments
07/18/18 3:37PM	Modified Attachments	JMORTON04	2.00	1	[Icon]
07/17/18 11:47AM	Executed	JMORTON04	1.00		[Icon]
07/17/18 11:45AM	Modified Attachments	JMORTON04	1.00		[Icon]
07/17/18 11:38AM	Reset to Dispatched	JMORTON04	1.00		
07/17/18 11:30AM	Imported Document	JMORTON04	1.00		
07/01/16 12:00AM	Executed	JMORTON04	1.00		[Icon]

Return to Document Management

Lesson 5 – Exercise 5.0

Creating an Amendment

Document Management

SetID STATE Contract ID 42700-023-10404-0001 [Return to Document Search](#)

Supplier NT SECURITY LLC

Contract Style Agency - Services
Document Type SPD Agency Services Contract
Description UNARMED SECURITY SERVICES
Administrator JMORTON04

Sponsor Department

Version 2.00 Created On 07/01/16 12:00AM [Document Details](#)
Status Draft Last Modified On 07/18/18 3:37PM
Executed On 07/17/18 11:47:28AM

[Reset to Dispatch](#)
[Create Amendment](#)

Imported Document

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

Modify Attachments/Related Documents
Document Version History

Review and Approval:
[Internal Contacts/Signers](#)
[External Contacts/Signers](#)
[Document View Access](#)

Document Management

SetID STATE Contract ID 42700-023-10404-0001 [Return to Document Search](#)

Supplier NT SECURITY LLC

Contract Style Agency - Services
Document Type SPD Agency Services Contract
Description UNARMED SECURITY SERVICES
Administrator JMORTON04

Sponsor Department

Amendment 1 Created On 07/01/16 12:00AM [Document Details](#)
Version 2.00 Amended On 07/18/18 3:30PM
Status Draft Last Modified On 07/18/18 3:43PM

Includes Imported Document

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

Modify Attachments/Related Documents
Document Modification Summary
Document Version History

Review and Approval:
[Route Internally](#)
[Approve](#)
[Internal Contacts/Signers](#)
[External Contacts/Signers](#)
[Document View Access](#)

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

Generation Log

Lesson 5 – Exercise 5.0

Creating an Amendment

Now complete the Dispatch to Contacts step—you will not actually dispatch at this time.

Document Management New Window | Help | Pers

SetID STATE Contract ID 42700-023-10404-0001 [Return to Document Search](#)

Supplier NT SECURITY LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description UNARMED SECURITY SERVICES

Administrator JMORTON04

Sponsor Department

Amendment 1 [Document Details](#)

Version 2.00

Status Approved

[Dispatch](#)

Includes Imported Document

Created On 07/01/16 12:00AM

Amended On 07/18/18 3:30PM

Last Modified On 07/18/18 3:46PM

View and Edit Options:

[View Original Document](#)

[View Amendment File](#)

[Edit Amendment File](#)

[Modify Attachments/Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

Review and Approval:

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Other Document Actions:

[Send to Contacts](#)

[Refresh Document](#)

[Recreate Document](#)

[Import Prior Document](#)

[Deactivate Document](#)

[Generation Log](#)

Amendments

The Amendment Status is now at Approved.

You now click to Dispatch to move the amendment through.

Lesson 5 – Exercise 5.0

Creating an Amendment

Use the drop-down to change the delivery method to Manual.

Dispatch

SetID STATE Contract ID 42700-023-10404-0001
Supplier NT SECURITY LLC

Version 2.00
Amendment 1
Administrator JMORTON04
Email: jmorton@ntsec.com

Delivery Method Manual

Send as File Type

Files To Be Sent

- Original Executed Document
- Amendment Files
 - Most Recent Only
 - All
- Attachments
- Related Documents
- Set to Checked Out
- Send Copy to Administrator

Subject:
Documents for Review/Signature - Contract ID: 42700-023-10404-0001

Contacts Personalize | Find | | First 1 of 1 Last

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

Select All Contacts Clear All Contacts

Attachments Personalize | Find | | First 1-2 of 2 Last

Files	Description				
Selected	Origin	Comment Type	File Name	Title	View
<input type="checkbox"/>	Document		Notice_of_Award_(1).doc	Notice of Award	View
<input type="checkbox"/>	Document		SPD-CP013ContractAmendmentTemplate.docx	Contract Amendment	View

Amendments

Lesson 5 – Exercise 5.0 Creating an Amendment

Now Execute the Amendment Document

Document Management New window | Help | Per

SetID STATE Contract ID 42700-023-10404-0001 [Return to Document Search](#)

Supplier NT SECURITY LLC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description UNARMED SECURITY SERVICES

Administrator JMORTON04

Sponsor Department

Amendment 1 Created On 07/01/16 12:00AM [Document Details](#)

Version 2.00 Amended On 07/18/18 3:30PM

Status Dispatched Last Modified On 07/18/18 3:52PM

Redispatch

Execute Contract

[Includes Imported Document](#)

View and Edit Options:

[View Original Document](#)

[View Amendment File](#)

[Edit Amendment File](#)

[Modify Attachments/Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

Review and Approval:

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Other Document Actions:

[Send to Contacts](#)

[Refresh Document](#)

[Recreate Document](#)

[Import Prior Document](#)

[Deactivate Document](#)

[Generation Log](#)

Amendments

Lesson 5 – Exercise 5.0

Creating an Amendment

Set the system to Approved, and Save.

Contract Entry

Contract

SetID STATE Contract ID 42700-023-10404-0001

***Status** Approved

Contract Version

Version 1 Status Current Approved Date 07/17/2018

Administrator/Buyer JMORTON04 JMORTON04

▼ Authored Document

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

▼ Header ?

Contract Style Agency - Services Buyer JMORTON04

Process Option General Contract Edit Comments Activity Log

Supplier NTSECURITY-001 Contract Activities Document Status

Supplier ID 0000507997 NT SECURITY LLC Primary Contact Info Thresholds & Notifications

Contract Header Agreement

Contract Releases

Begin Date 07/01/2016

Expire Date 06/30/2017

Renewal Date

Currency USD CRRNT

Primary Contact Contact Name:

Supplier Contract Ref

Description UNARMED SECURITY SERVICES

Master Contract ID

Tax Exempt ID STATE OF GEORGIA

Tax Exempt

Fiscal Year 2017

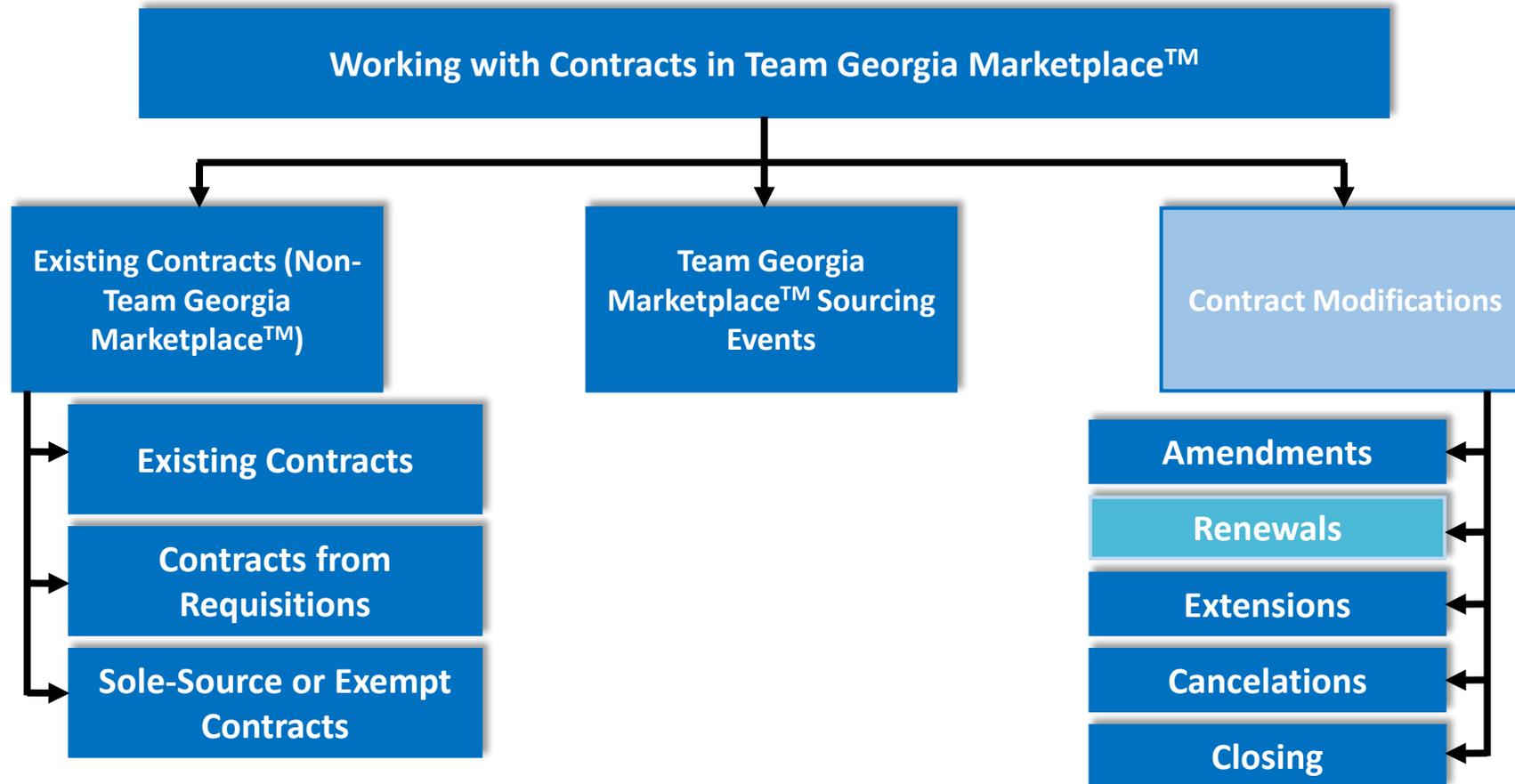
Amount Summary ?

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

Lesson 5 – Exercise 5.1

Renewing a Contract

Working with contracts in Team Georgia Marketplace™:



Lesson 5 – Exercise 5.1

Renewing a Contract

Steps for Renewing a Contract:

- Find the contract in Supplier Contracts
- Change the system status from Approved to Open and Save
- Change the expire date to the new date
- Optional—enter header comments
- Click to uncheck Initial and click on Renewal link
- Enter the renewal # _____ of # _____
- Enter the begin date and end date of this contract period
- Adjust the maximum amount if needed
- Click on Maintain Document at the top right
- Click to Create Amendment
- Select Amendment Template to use
- Enter Major change—information that contract has been renewed
- Attach all renewal documents
- Submit for Approval
- Set Dispatch to manual (or email)
- Execute the amendment
- Click on the Contract Id to return to the Header screen
- Set system status to Approved and Save

Lesson 5 – Exercise 5.1

Renewing a Contract



Scenario: Pete Smith needs to renew the Trash Removal Contract for another year. This involves both the Renewal process AND creating an amendment.

STUDENT INDEPENDENT EXERCISE

Lesson 5 – Exercise 5.1: Renewing a Contract

Locate the 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](#)

▼ **Search Criteria**

SetID = ▾ STATE 🔍

Contract ID contains ▾ 42700-023-12122 ✕

Contract Version = ▾

Version Status = ▾

Contract Process Option = ▾

Supplier ID begins with ▾ 🔍

Short Supplier Name begins with ▾ 🔍

Supplier Name begins with ▾ 🔍

Contract Status = ▾

Master Contract ID begins with ▾ 🔍

Description begins with ▾

Supplier Contract Ref begins with ▾

Corporate Contract = ▾

Contract Style begins with ▾ 🔍

Correct History Case Sensitive

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

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

Lesson 5 – Exercise 5.1: Renewing a Contract

Change the System Status to Open, Save, and change the Expire Date.

Renewals

The screenshot shows a 'Contract Entry' form with the following details:

- Contract ID:** 42700-023-10405-0001
- Contract Version:** 1
- Status:** Current
- Approved Date:** 07/18/2018
- *Status:** Open (highlighted with a red box)
- Administrator/Buyer:** JMORTON04
- Authorized Document:** Executed, Document Version 1.01, Amendment 0
- Header:**
 - *Contract Style: Agency - Services
 - Process Option: General Contract
 - *Supplier: AIR&WASTEM-00
 - *Supplier ID: 0000037565
 - *Begin Date: 07/01/2016 (highlighted with a red box)
 - Expire Date: 06/30/2018 (highlighted with a red box)
 - Renewal Date: (empty)
 - Currency: USD
 - Primary Contact: Contact
 - Supplier Contract Ref: (empty)
 - Description: TRASH REMOVAL
 - Master Contract ID: (empty)
 - Tax Exempt ID: STATE OF GEORGIA
 - ☑ Tax Exempt
 - Fiscal Year: 2017
- Amount Summary:**
 - Maximum Amount: 24,000.00 USD (highlighted with a red box)
 - Line Item Released Amount: 0.00
 - Category Released Amount: 0.00
 - Open Item Released Amount: 0.00
 - Total Released Amount: 0.00
- Order Contract Options:**
 - Allow Multicurrency PO
 - Allow Open Item Reference
 - Must Use Contract Rate Date
 - Corporate Contract
 - Adjust Supplier Pricing First
 - Auto Default
 - Lock Chartfields
 - Price Can Be Changed on Order
 - Initial Period (highlighted with a red box)
 - Renewals (highlighted with a red box)
 - Non-Profit
 - Multi-Agreement

Comments are optional

Lesson 5 – Exercise 5.1: Renewing a Contract

Uncheck Initial Period to Enter the Renewal Status information.

Renewals

Contract Renewals Page

Contract Entry

Contract Renewals

SetID: STATE C 00-023-10405-0001

Renewal Status: **Renewal** (dropdown menu also shows Cancelled, Extended)

Renewal #: 1 of: 4

Renewal from: 07/01/2017 To: 06/30/2018

OK Cancel Refresh

Select Renewals from the drop-down. Then enter which renewal this is and the Renewal From and To dates

Lesson 5 – Exercise 5.1: Renewing Contract/Create Renewal Amendment

Now create the Renewal Amendment on the contract.

Contract Entry
Contract

SetID STATE Contract Version
Contract ID 42700-023-10405-0001 Version 1 Status Current
*Status Open Approved Date 07/18/2018
Administrator/Buyer JMORTON04 JMORTON04

▼ Authored Document
Authored Status Executed Document Version 1.01 Amendment 0 **Maintain Document**

▼ Header ?

*Contract Style Agency - Services Buyer JMORTON04
Process Option General Contract Add Comments Activity Log
*Supplier AIR&WASTEM-00 Supplier Search Contract Activities Document Status
*Supplier ID 0000037565 AIR & WASTE MANAGEMENT Primary Contact Info Thresholds & Notifications
ASSOCIATION Contract Header Agreement
*Begin Date 07/01/2016 Contract Releases
Expire Date 06/30/2018
Renewal Date
Currency USD CRRNT

Primary Contact Contact
Name:
Supplier Contract Ref
Description TRASH REMOVAL
Master Contract ID
Tax Exempt ID STATE OF GEORGIA
 Tax Exempt
Fiscal Year 2017

Amount Summary ?
Maximum Amount 24,000.00 USD
Line Item Released Amount 0.00
Category Released Amount 0.00
Open Item Released Amount 0.00
Total Released Amount 0.00

Renewals

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

Lesson 5 – Exercise 5:1 Renewing Contract/Creating Renewal Amendment

Create the Amendment

Document Management

SetID STATE Contract ID 42700-023-10405-0001 [Return to Document Search](#)

Supplier AIR & WASTE MANAGEMENT ASSOCIATION

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description TRASH REMOVAL

Administrator JMORTON04

Sponsor Department

Version 1.01 Created On 07/01/16 12:00AM Document Details

Status Executed Last Modified On 07/18/18 2:13PM

Executed On 07/18/18 2:13:24PM

[Reset to Dispatch](#)

[Create Amendment](#)

Imported Document

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

[Modify Attachments/Related Documents](#)

[Document Version History](#)

Review and Approval:

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

Other Document Actions:

[Send to Contacts](#)

[Deactivate Document](#)

Renewals

Lesson 5 – Exercise 5:1 Renewing Contract/Creating Renewal Amendment

Select Major Version, the Configurator ID 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: SPD_AGENCY_CNT_AMNDT

Version:

- Reset Version back to 0.00
- Minor Version (1.02)
- Major Version (2.00)

Comments: Amendment Created: THE CONTRACT IS RENEWED FOR ANOTHER YEAR
195 characters remaining

OK Cancel

Renewals

Lesson 5 – Exercise 5.1: Renewing Contract/Creating Renewal Amendment

Add Attachments relevant to the Renewal.

Renewals

The screenshot displays the 'Document Management' interface for a contract. The contract details include: SetID STATE, Contract ID 42700-023-12122, Supplier 400 WASTE & SCRAP LLC, Contract Style Agency - Services, Document Type SPD Agency Services Contract, Description TRASH REMOVAL, and Administrator JMORTON04. The 'Amendment 1' section shows Version 2.00, Status Draft, Created On 07/01/16 12:00AM, Amended On 08/02/18 3:25PM, and Last Modified On 08/02/18 3:26PM. The 'View and Edit Options' section includes buttons for 'View Original Document', 'View Amendment File', 'Edit Amendment File', 'Route Internally', 'Approve', 'Internal Contacts/Signers', 'External Contacts/Signers', 'Send to Contacts', 'Refresh Document', 'Recreate Document', and 'Import Prior Document'. A red box highlights the 'Modify Attachments/Related Documents' link. Below this, the 'Attachments and Related Documents' section is visible, featuring an 'Upload another Document Attachment File' button (highlighted with a red box) and a table of attachments. The table has columns for 'Files', 'Description', 'File Name', 'Title', 'View', and 'Delete'. One attachment is listed: 'Notice_of_Award_(1).doc' with title 'NOTICE OF AWARD'. Below the table is a 'Related Documents' section with a table for document details and search filters.

Files	Description	File Name	Title	View	Delete
<input checked="" type="checkbox"/>		Notice_of_Award_(1).doc	NOTICE OF AWARD	View	

Related Documents	Details	Allow Email/Dispatch	Visible to Supplier	*Source Transaction	*SetID	Contract ID	Ad Hoc ID	Business Unit	PO Number	Event ID	Internal	Document Status
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>									

Add the following attachments:

- Contract Assessment form
- Contract Action
- Any renewal letters or agreements
- Updated Insurance and/or Bond
- Updated Immigration document for Public Works

Lesson 5.1: Renewing Contract/Creating Renewal Amendment

Make sure to include the Contract Renewal Document.



CONTRACT RENEWAL TEMPLATE 1

The purpose of this document is to provide written notice of the State Entity's decision to exercise its right to renew the contract identified below for an additional term. To the extent the contract requires the State Entity to issue a Notice of Award Amendment for purposes of exercising the renewal option, this written document shall serve as such Notice of Award Amendment.

STATE OF GEORGIA CONTRACT	
State Entity's Name:	<input type="text"/>
Contractor's Full Legal Name:	<input type="text"/>
Contract No.:	<input type="text"/>
Solicitation No./Event ID:	<input type="text"/>
Solicitation Title/Event Name:	<input type="text"/>
Contract Award Date:	<input type="text"/>
Current Contract Term:	<input type="text"/>
Beginning Date of New Contract Term:	<input type="text"/>
End Date of New Contract Term:	<input type="text"/>

Lesson 5 – Exercise 5.1: Renewing Contract/Creating Renewal Amendment

Complete the Approval and Dispatch Process, and then Execute Contract.

Renewals

Document Management

SetID STATE Contract ID 42700-023-12122 Return to Document Search

Supplier 400 WASTE & SCRAP LLC

Contract Style Agency - Services
Document Type SPD Agency Services Contract
Description TRASH REMOVAL
Administrator JMORTON04

Sponsor Department

Amendment 1 Created On 07/01/16 12:00AM
Version 2.00 Amended On 08/02/18 3:25PM
Status Draft Last Modified On 08/02/18 3:32PM

Includes Imported Document

View and Edit Options:
View Original Document
View Amendment File
Edit Amendment File

Review and Approval:
Route Internally
Approve
Internal Contacts/Signers
External Contacts/Signers
Document View Access

Modify Attachments/Related Documents
Document Modification Summary
Document Version History

Dispatch

SetID STATE Contract ID 42700-023-10405-0001

Supplier AIR & WASTE MANAGEMENT ASSOCIATION

Version 2.00
Amendment 1
Administrator JMORTON04
Email fs92upk@sao.ga.gov

Delivery Method Manual

Send as File Type Preview PDF

Files To Be Sent

- Original Executed Document
- Amendment Files
 - Most Recent Only
 - All
- Attachments
- Related Documents
- Set to Checked Out
- Send Copy to Administrator

Subject:
Documents for Review/Signature - Contract ID: 42700-023-10405-0001

Contacts

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

Select All Contacts Clear All Contacts

Attachments

Selected	Origin	Comment Type	File Name	Title
<input type="checkbox"/>	Document		Agency_Contract_for_Services.xlsx	Agency Services
<input type="checkbox"/>	Document		SPECIAL_TERMS_AND_CONDITIONS.docx	Renewal Terms

OK Cancel

Document Management

SetID STATE Contract ID 42700-023-10405-0001 Return to Document Search

Supplier AIR & WASTE MANAGEMENT ASSOCIATION

Contract Style Agency - Services
Document Type SPD Agency Services Contract
Description TRASH REMOVAL
Administrator JMORTON04

Sponsor Department

Amendment 1 Created On 07/01/16 12:00AM
Version 2.00 Amended On 07/23/18 2:55PM
Status Dispatched Last Modified On 07/23/18 3:08PM

Redispatch
Execute Contract

Includes Imported Document

View and Edit Options:
View Original Document
View Amendment File
Edit Amendment File

Review and Approval:
Internal Contacts/Signers
External Contacts/Signers
Document View Access

Other Document Actions:
Send to Contacts
Refresh Document
Recreate Document
Import Prior Document
Deactivate Document

Modify Attachments/Related Documents
Document Modification Summary
Document Version History

Generation Log

Lesson 5 – Exercise 5.1: Renewing Contract/Creating Renewal Amendment

Set the System Status to Approved and Save.

Contract Entry
Contract

SetID STATE
Contract ID 42700-023-12122

***Status** Approved

Contract Version
Version 1 Status Current
Approved Date 07/30/2018

Administrator/Buyer JMORTON04 JMORTON04

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

▼ Header ?

Contract Style Agency - Services
Process Option General Contract
Supplier 400WASTE&S-001
Supplier ID 0000540388 [400 WASTE & SCRAP LLC](#)
Begin Date 07/01/2016
Expire Date 06/30/2018
Renewal Date
Currency USD CRRNT
Primary Contact Contact Name:
Supplier Contract Ref
Description TRASH REMOVAL
Master Contract ID
Tax Exempt ID STATE OF GEORGIA
 Tax Exempt
Fiscal Year 2017

Buyer JMORTON04
[Add Comments](#)
[Contract Activities](#)
[Primary Contact Info](#)
[Contract Header Agreement](#)
[Contract Releases](#)
[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)

Amount Summary ?

Maximum Amount	24,000.00 USD
Line Item Released Amount	0.00
Category Released Amount	0.00
Open Item Released Amount	0.00
Total Released Amount	0.00
Remaining Amount	24,000.00
Remaining Percent	100.00

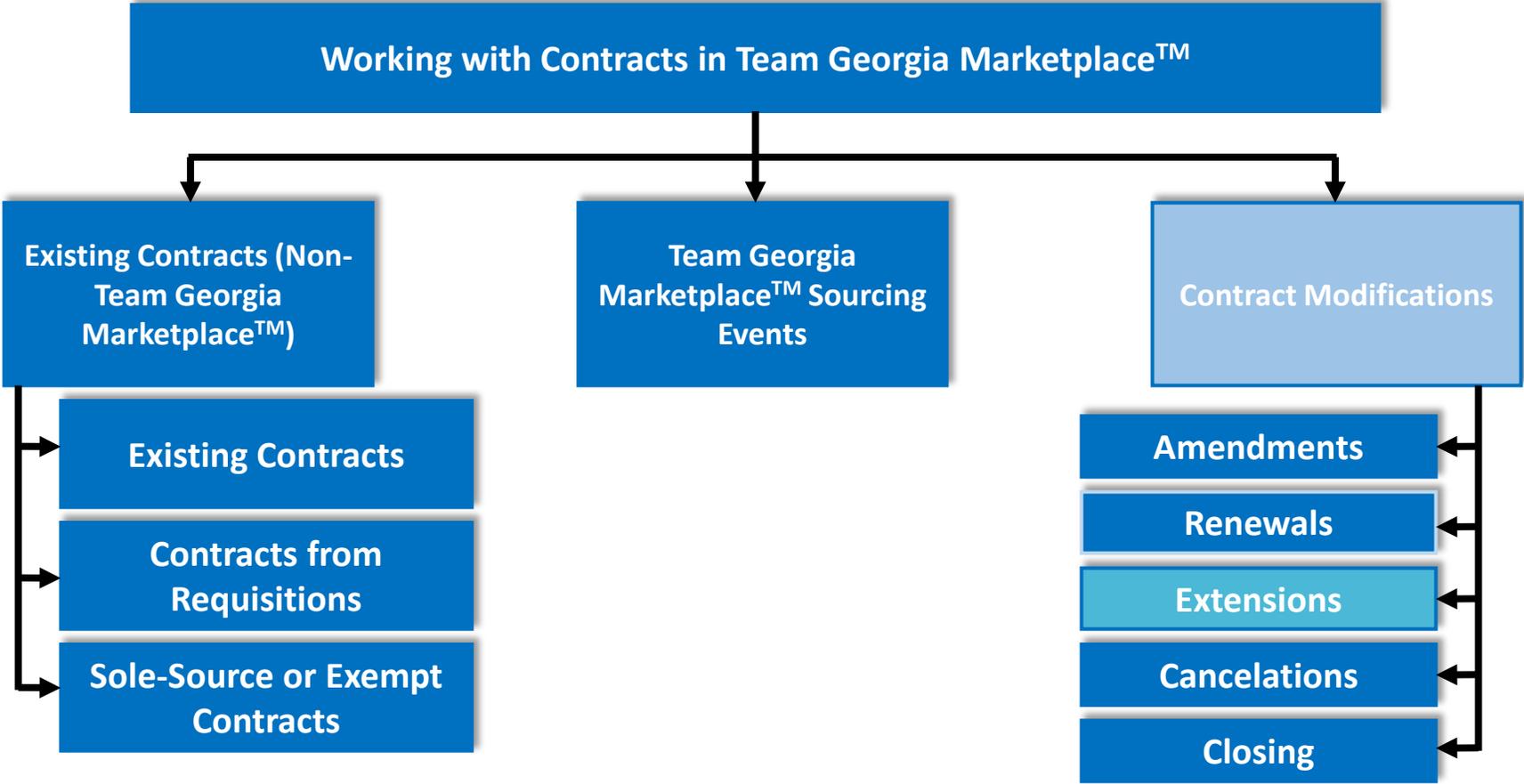
Lesson 5 – Exercise 5.2 Extending a Contract



Scenario: It is the end of the contract year and Pete Smith needs to Extend the Unarmed Security Service contract for 90 days because a new Statewide Contract for this services has been established and is scheduled to begin in 3 months. He has informed the supplier who has agreed to extend the contract for 90 days.

Lesson 5 – Exercise 5:2 – Extending Contract

Working with contracts in Team Georgia Marketplace™:



Lesson 5 – Exercise 5.2: Extending a Contract

Steps for Extending a Contract:

- Find the contract in Supplier Contracts
- Change the system status from Approved to Open and Save
- Change the expire date to the new date
- Optional—enter header comments
- Click to uncheck Initial and click on Renewal link and select Extended from the dropdown options
- Enter the end date of this contract extension period
- Adjust the maximum amount if needed
- Click on Maintain Document at the top right
- Click to Create Amendment
- Select Amendment Template to use
- Enter Major change—information that contract has been extended
- Attach all extension documents
- Submit for Approval
- Set Dispatch to manual (or email)
- Execute the amendment
- Click on the Contract Id to return to the Header screen
- Set system status to Approved and Save

Lesson 5-Exercise 5.2: Extending a Contract

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

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

Search Criteria

SetID [v] STATE [v]

Contract ID [contains] 42700-023-12121

Contract Version [v]

Version Status [v]

Contract Process Option [v]

Supplier ID [begins with]

Short Supplier Name [begins with]

Supplier Name [begins with]

Contract Status [v]

Master Contract ID [begins with]

Description [begins with]

Supplier Contract Ref [begins with]

Corporate Contract [v]

Contract Style [begins with]

Correct History Case Sensitive

Search Results

View All

SetID	Contract ID	Contract Version	Version Status	Contract Process Option	Supplier ID	Short Supplier Name	Supplier Name	Expire Date	Contract Status	Master
STATE	2700-023-12121-0001	1	Current	General	0000041257	GASECURITY-003	GEORGIA SECURITY SYSTEMS INC	06/30/2017	Approved	(blank)

Extensions

Lesson 5 – Exercise 5.2: Extending a Contract

*Status: Open Approved Date: 07/30/2018
Administrator/Buyer: JMORTON04 JMORTON04

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

▼ Header
*Contract Style: Agency - Services Buyer: JMORTON04
Process Option: General Contract
*Supplier: GASECURITY-003 Supplier Search
*Supplier ID: 0000041257 GEORGIA SECURITY SYSTEMS INC
*Begin Date: 07/01/2016
Expire Date: 09/30/2017
Renewal Date:
Currency: USD CRRNT
Primary Contact: Contact
Supplier Contract Ref: Name:
Description: UNARMED SECURITY SERVICES
Master Contract ID:
Tax Exempt ID: STATE OF GEORGIA
Tax Exempt:
Fiscal Year: 2017

Amount Summary
Maximum Amount: 37000.00 USD
Line Item Released Amount: 0.00
Category Released Amount: 0.00
Open Item Released Amount: 0.00
Total Released Amount: 0.00
Remaining Amount: 36,000.00
Remaining Percent: 100.00

▼ Order Contract Options
 Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date: 07/30/2018
 Corporate Contract Adjust Supplier Pricing First Auto Default Group:
 Lock Chartfields Price Can Be Changed on Order
PO Defaults Add Open Item Price Adjustments Price Adjustment Template **Initial Period** **Renewals**
 Non-Profit Multi-Agreement Type:
 Initial Period Renewals

Contract Renewals Page

Contract Entry

Contract Renewals

SetID: STATE Contract Id: 42700-023-12121-0001

Renewal Status: Extended Renewal #: of:
Renewal from: 06/30/2017 To: **09/30/2017**

OK Cancel Refresh

Lesson 5 – Exercise 5.2: Extending a Contract

Contract Entry
Contract

SetID STATE Contract Version
Contract ID 42700-023-12121-0001 Version 1 Status Current
*Status Open Approved Date 07/30/2018
Administrator/Buyer JMORTON04 JMORTON04

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

▼ Header ?

*Contract Style Agency - Services Buyer JMORTON04
Process Option General Contract Edit Comments Activity Log
*Supplier GASECURITY-003 Supplier Search Contract Activities Document S
*Supplier ID 0000041257 GEORGIA SECURITY SYSTEMS Primary Contact Info Thresholds
INC Contract Header Agreement
Contract Releases

*Begin Date 07/01/2016
Expire Date 09/30/2017
Renewal Date
Currency USD CRRNT

Primary Contact Contact
Name:

Supplier Contract Ref
Description UNARMED SECURITY SERVICES
Master Contract ID
Tax Exempt ID STATE OF GEORGIA
 Tax Exempt
Fiscal Year 2017

Amount Summary ?
Maximum Amount
Line Item Released Amount
Category Released Amount
Open Item Released Amount
Total Released Amount
Remaining Amount
Remaining Percent

Document Management

SetID STATE Contract ID 42700-023-12121-0001 [Return to Document Search](#)
Supplier GEORGIA SECURITY SYSTEMS INC
Contract Style Agency - Services
Document Type SPD Agency Services Contract
Description UNARMED SECURITY SERVICES
Administrator JMORTON04

Sponsor Department

Amendment 1 Created On 07/01/16 12:00AM Document Details
Version 2.00 Amended On 08/02/18 2:54PM
Status Executed Last Modified On 08/02/18 3:05PM
Executed On 08/02/18 3:05:02PM

[Reset to Dispatch](#)
Create Amendment

Includes Imported Document

View and Edit Options: Review and Approval: Other Document Actions:
[View Original Document](#) Internal Contacts/Signers [Send to Contacts](#)
[View Amendment File](#) External Contacts/Signers [Import Prior Document](#)
Modify Attachments/Related Documents Document View Access [Deactivate Document](#)
Document Modification Summary Generation Log
Document Version History

Lesson 5 – Exercise 5.2: Extending a Contract

Create an Amended Version Help

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 Reset Version back to 0.00
 Minor Version (2.01)
 Major Version (3.00)

Comments

207 characters remaining

Document Management

SetID STATE Contract ID 42700-023-12121-0001 [Return to Document Search](#)

Supplier GEORGIA SECURITY SYSTEMS INC

Contract Style Agency - Services
Document Type SPD Agency Services Contract
Description UNARMED SECURITY SERVICES
Administrator JMORTON04

Sponsor Department

Amendment 2
Version 3.00
Status Draft

Created On 07/01/16 12:00AM
Amended On 08/02/18 4:08PM
Last Modified On 08/02/18 4:09PM

[Document Details](#)

Includes Imported Document

View and Edit Options:	Review and Approval:	Other Document Actions:
<input type="button" value="View Original Document"/>	<input type="button" value="Route Internally"/>	<input type="button" value="Send to Contacts"/>
<input type="button" value="View Amendment File"/>	<input type="button" value="Approve"/>	<input type="button" value="Refresh Document"/>
<input type="button" value="Edit Amendment File"/>	Internal Contacts/Signers	<input type="button" value="Recreate Document"/>
<input type="button" value="Modify Attachments/Related Documents"/>	External Contacts/Signers	<input type="button" value="Import Prior Document"/>
Document Modification Summary	Document View Access	<input type="button" value="Deactivate Document"/>
Document Version History		Generation Log

Lesson 5 – Exercise 5.2: Extending a Contract

Attachments and Related Documents

SetID STATE Contract ID 42700-023-12121-0001
Supplier GEORGIA SECURITY SYSTEMS INC

Upload another Document Attachment File

Attachments Personalize | Find | [grid icon] | First 1-3 of 3 Last

Files	Description			
Allow Email/Dispatch	File Name	Title	View	Delete
<input checked="" type="checkbox"/>	Notice_of_Award_(1).doc	Notice of Award	View	-
<input checked="" type="checkbox"/>	Insurance_Bond.docx	Insurance	View	-
<input checked="" type="checkbox"/>	SPD-CP013ContractAmendmentTemplate.docx	Amendment	View	-

Related Documents Personalize | Find | View All | [grid icon] | First 1 of 1 Last

Related Documents	Details													
Allow Email/Dispatch	Visible to Supplier	*Source Transaction	*SetID	Contract ID	Ad Hoc ID	Business Unit	PO Number	Event ID		Internal	Document Status			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>		<input type="checkbox"/>		+	-							

OK Cancel

Lesson 5 – Exercise 5.2: Extending a Contract

Document Management

SetID STATE Contract ID 42700-023-12121-0001 [Return to Document Search](#)

Supplier GEORGIA SECURITY SYSTEMS INC

Contract Style Agency - Services
Document Type SPD Agency Services Contract
Description UNARMED SECURITY SERVICES
Administrator JMORTON04

Sponsor _____ Department _____

Amendment 2
Version 3.00
Status Draft

Created On 07/01/16 12:00AM
Amended On 08/02/18 4:08PM
Last Modified On 08/02/18 4:18PM

[Document Details](#)

Includes Imported Document

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

Review and Approval:
[Route Internally](#)
[Approve](#)
[Internal Contacts/Signers](#)
[External Contacts/Signers](#)
[Document Modification Summary](#)
[Document View Access](#)
[Document Version History](#)

Document Management

SetID STATE Contract ID 42700-023-12121-0001

Supplier GEORGIA SECURITY SYSTEMS INC

Contract Style Agency - Services
Document Type SPD Agency Services Contract
Description UNARMED SECURITY SERVICES
Administrator JMORTON04

Sponsor _____ Department _____

Amendment 2
Version 3.00
Status Approved

Created On 07/01/16 12:00AM
Amended On 08/02/18 4:08PM
Last Modified On 08/02/18 4:20PM

[Dispatch](#)

Includes Imported Document

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

Review and Approval:
[Internal Contacts/Signers](#)
[External Contacts/Signers](#)
[Document View Access](#)
[Document Modification Summary](#)
[Document Version History](#)

Dispatch

SetID STATE Contract ID 42700-023-12121-0001

Supplier GEORGIA SECURITY SYSTEMS INC

Version 3.00
Amendment 2
Administrator JMORTON04
Email fs92upk@sao.ga.gov

Delivery Method: **Manual**

Send as File Type: _____ [Preview PDF](#)

Files To Be Sent

- Original Executed Document
- Amendment Files
 - Most Recent Only
 - All
- Attachments
- Related Documents
- Set to Checked Out
- Send Copy to Administrator

Subject:
Documents for Review/Signature - Contract ID: 42700-023-12121-0001

Contacts Personalize | Find | First 1 of 1 Last

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

Select All Contacts Clear All Contacts

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

Selected	Origin	Comment Type	File Name	Title	View
<input type="checkbox"/>	Document		Notice_of_Award_(1).doc	Notice of Award	View
<input type="checkbox"/>	Document		Insurance_Bond.docx	Insurance	View
<input type="checkbox"/>	Document		SPD-CP013ContractAmendmentTemplate.docx	Amendment	View
<input type="checkbox"/>	Document		SPD-CP013ContractAmendmentTemplate.docx	Amendment #2	View

[OK](#) [Cancel](#)

[Deactivate Document](#)

[Generation Log](#)

Lesson 5 – Exercise 5.2: Extending a Contract

Document Management

SetID STATE **Contract ID 42700-023-12121-0001** [Return to Document Search](#)

Supplier GEORGIA SECURITY SYSTEMS INC

Contract Style Agency - Services

Document Type SPD Agency Services Contract

Description UNARMED SECURITY SERVICES

Administrator JMORTON04

Sponsor Department

Amendment 2
Version 3.00
Status Dispatched

Created On 07/0
Amended On 08/0
Last Modified On 08/0

[Redispatch](#)

Execute Contract

Includes Imported Document

View and Edit Options:

- [View Original Document](#)
- [View Amendment File](#)
- [Edit Amendment File](#)

[Modify Attachments/Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

Review and Approval:

- [Internal Contacts/Signers](#)
- [External Contacts/Signers](#)
- [Document View Access](#)

Other Document Actions:

- [Send to Contacts](#)
- [Refresh Document](#)
- [Recreate Document](#)
- [Import Prior Document](#)
- [Deactivate Document](#)

[Generation Log](#)

Contract Entry

Contract

SetID STATE **Contract ID 42700-023-12121-0001** ***Status Approved** **Contract Version** Version 1 Status Current Approved Date 07/30/2018

Administrator/Buyer JMORTON04 JMORTON04

▼ Authored Document

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

Lesson 5 – Exercise 5.3 Closing a Contract



Scenario: It is 90 days later and Pete Smith needs to close the Unarmed Security Services contract because it has been replaced by a new SWC.

Lesson 5 – Exercise 5:3 – Closing Contract

Working with contracts in Team Georgia Marketplace™:



Lesson 5 – Exercise 5.3: Closing a Contract

Steps for Closing a Contract:

- Find the contract in Contract Entry
- Change the system status from Approved to Open and Save if you need to change any information on the header
- Optional - change the expire date to the new date if applicable
- Enter header comments explaining why the contract is being closed
- Optional - click on Maintain Document at the top right if you need to add any additional attachments. Note you will have to Reset to Dispatch to do so
- Click on the Contract ID to return to the Header screen
- Set system status to Closed and Save

Lesson 5 – Exercise 5.3: Closing a Contract

Enter a comment explaining your action.

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

Contract Entry

Contract

SetID:	STATE	Contract Version	
Contract ID:	42700-023-ES11111-0001	Version:	1 Status: Current
*Status:	Approved	New Version	Approved Date: 10/23/2012
Administrator/Buyer:	PSMITH01	PSMITH01	
▼ Authored Document			
Authored Status:	Executed	Document Version:	3.00 Amendment: 2 Maintain Document
▼ Header			
Payment Terms ID:	N30	Buyer:	PSMITH01
Process Option:	General Contract	Edit Comments	Activity Log
Vendor:	A1SECURITY-001	Contract Activities	Document Status
Vendor ID:	0000201891	A1 SECURITY AND SAFE INC	Primary Contact Info
Begin Date:	08/01/2012	Contract Header Agreement	Thresholds & Notifications
Expire Date:	09/30/2013	Contract Releases	
Renewal Date:		Amount Summary	
Currency:	USD CRRNT	Maximum Amount:	37,000.00 USD
		Maximum Released Amount:	0.00

Closing

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

Lesson 5 – Exercise 5.3: Closing a Contract

Enter comments explaining why the contract is being closed.

The screenshot shows a software window titled "Contract Comments". At the top, it displays "Contract Entry" and "Header Comments". Below this, it shows contract details: "SetID STATE", "Contract ID 42700-023-12121-0001", and "Version 1". There are search and filter options, including a checked box for "Retrieve Active Comments Only" and a "Retrieve" button. Sorting options are set to "Comment Time Stamp" and "Ascending". The main area is titled "Comments" and shows a single comment: "Contract is being replaced with SWC. JMORTON04 08/06/2018". This comment text is highlighted with a red box. Below the comment, there are checkboxes for "Send to Supplier", "Show at Receipt", "Copy to Purchase Order", and "Show at Voucher". An "Associated Document" section contains an "Attachment" field and buttons for "Attach", "View", "Delete", and "Email". At the bottom, there are "OK", "Cancel", and "Refresh" buttons.

Closing

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 5 – Exercise 5.3: Closing Contracts

The System Status for contract not being renewed or not eligible for renewal is Closed.

Contract Entry
Contract

SetID STATE
Contract ID 42700-023-12121-0001
Status **Closed** (highlighted in red)

Contract Version
Version 1 Status Current
Approved Date 07/30/2018

Administrator/Buyer JMORTON04 JMORTON04

▼ Authored Document
Authored Status Executed Document Version 3.00 Amendment 2 [Maintain Document](#)

▼ Header ?

Contract Style Agency - Services Buyer JMORTON04
Process Option General Contract Edit Comments Activity Log
Supplier GASECURITY-003 Contract Activities Document Status
Supplier ID 0000041257 GEORGIA SECURITY SYSTEMS INC Primary Contact Info Thresholds & Notifications
Contract Header Agreement
Contract Releases

Begin Date 07/01/2016
Expire Date 09/30/2017

Renewal Date

Currency USD CRRNT

Primary Contact Contact Name:
Supplier Contract Ref
Description UNARMED SECURITY SERVICES
Master Contract ID
Tax Exempt ID STATE OF GEORGIA
 Tax Exempt
Fiscal Year 2017

▼ Amount Summary ?

Maximum Amount	37,000.00 USD
Line Item Released Amount	0.00
Category Released Amount	0.00
Open Item Released Amount	0.00
Total Released Amount	0.00
Remaining Amount	37,000.00
Remaining Percent	100.00

▼ Order Contract Options ?

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date 07/30/2018
 Corporate Contract Adjust Supplier Pricing First Auto Default Group
 Lock Chartfields Price Can Be Changed on Order
PO Defaults Add Open Item Price Adjustments Price Adjustment Template
 Initial Period Renewals
 Non-Profit Multi-Agreement Type

▼ Voucher Contract Options ?

Closing

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!

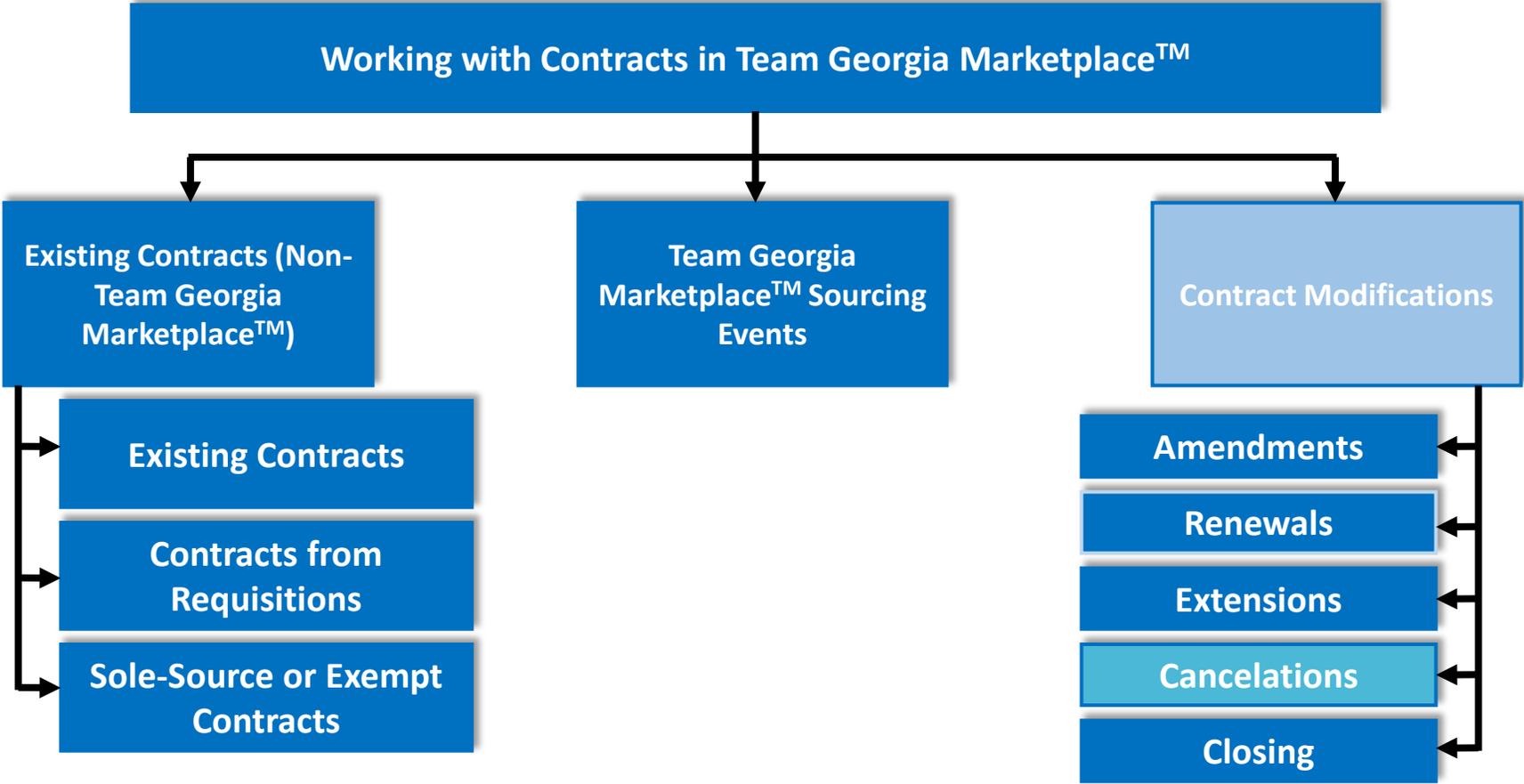
Lesson 5 – Exercise 5.4 Canceling a Contract



Scenario: It is December 10, 20XX and Pete Smith needs to Cancel the Pest Control contract for poor performance (for cause). He has tried to work with the supplier for months and has seen no improvement. He has an updated Contract Assessment form, a Supplier Performance Report, a Cure letter, and a document containing several emails to support this action.

Lesson 5 – Exercise 5:4 – Cancelling a Contract

Working with contracts in Team Georgia Marketplace™:



Lesson 5 – Exercise 5.4: Canceling a Contract

Steps for Canceling a Contract:

- Find the contract in Contract Entry
- Change the system status from Approved to Open and Save
- Change the expire date to the date the contract can no longer be used
- Enter header comments indicating why the contract is being canceled.
Indicate all documents will be in the document management section
- Click to uncheck Initial and click on Renewal link. Select Canceled from the dropdown options
- Enter the date the contract cancellation goes into effect
- Click on Maintain Document at the top right
- Click to Reset to Dispatch
- Attach all documentation explaining or supporting the cancellation
- Execute the amendment
- Click on the Contract ID to return to the Header screen
- Set system status to Canceled and Save

Lesson 5 – Exercise 5.4: Canceling a Contract

Find the contract to be canceled.

Contract Entry

Contract

SetID: STATE Contract Version

Contract ID: 42700-023-DHS0000203-0001 Version: 1 Status: Current

*Status: **Open** Approved Date: 03/20/2018

Administrator/Buyer: PSMITH01 PSMITH01

▼ Authored Document

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

▼ Header

*Payment Terms ID: N30 Buyer: PSMITH01 [Edit Comments](#) [Activity Log](#)

Process Option: General Contract [Contract Activities](#) [Document Status](#)

Vendor: ADAMSEXTER-001 [Vendor Search](#) [Primary Contact Info](#) [Thresholds & Notifications](#)

*Vendor ID: 0000010645 [ADAMS EXTERMINATORS INC](#) [Contract Header Agreement](#)

*Begin Date: 07/01/2016 [Contract Releases](#)

Expire Date: **03/01/2018**

Renewal Date:

Currency: USD [CRRNT](#)

Primary Contact: [1](#) [Contact](#) RACINGREED3031@HOTMAIL.COM

Vendor Contract Ref:

Description: 03 Pest Control

Master Contract ID:

Tax Exempt STATE OF GA

Fiscal Year: 2017

Amount Summary

Maximum Amount:	36,000.00	USD
Line Item Released Amount:	0.00	
Category Released Amount:	0.00	
Open Item Released Amount:	0.00	
Total Released Amount:	0.00	
Remaining Amount:	36,000.00	
Remaining Percent:	100.00	

Cancelations

1. Change the System Status to Open
2. Change the Expire Date to contract end date
3. Add comments explaining why the contract is being cancelled
4. On the contract page, add all documents
5. Unclick Initial Period and in the Renewal screen, click on Cancelled-enter the date
6. Change the System Status to Cancelled

Lesson 5 – Exercise 5.4: Canceling a Contract

Enter a comment indicating the reason for canceling.

Contract Entry

Header Comments

SetID: STATE Contract ID: 42700-023-DHS0000200-0001 Version: 1

Retrieve Active Comments Only

*Sort Method: *Sort Sequence:

Comments Find | View All First 1 of 2 Last

[Use Standard Comments](#) Comment Status: Active +

Contract is being cancelled as of 12/30/XX due to poor performance. All documents and supporting documentation can be found in the contracts section

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

Associated Document

Attachment: Supplier_Infor_doc.pdf Email

[From -> SSE 42700-DHS0000200](#)

Cancelations

Indicate the reason for canceling the contract. Enter date and “sign” comment. Indicate that all applicable documents are attached to the contract.

Lesson 5 – Exercise 5.4: Canceling a Contract

Enter the Maintain Document section to attach cancel documents.

Contract Entry
Contract

SetID: STATE
Contract ID: 42700-023-DHS0000200-0001
*Status: Open
Administrator/Buyer: PSMITH01

Contract Version
Version: 1 Status: Current
Approved Date: 08/26/2013

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

Header
*Payment Terms ID: N30
Process Option: General Contract
Vendor: ADAMSEXTER-001
*Vendor ID: 0000010645
*Begin Date: 09/01/2013
Expire Date: 12/30/2013
Renewal Date:
Currency: USD
Primary Contact: 1 Contact RACINGREED3031@HOTMAIL.COM
Vendor Contract Ref:
Description: Pest Control
Master Contract ID:
 Tax Exempt STATE OF GA
Fiscal Year 2014

Buyer: PSMITH01
[Edit Comments](#)
[Contract Activities](#)
[Primary Contact Info](#)
[Contract Header Agreement](#)
[Contract Releases](#)
[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)

Amount Summary
Maximum Amount: 36,000.00 USD
Line Item Released Amount: 0.00
Category Released Amount: 0.00
Open Item Released Amount: 0.00
Total Released Amount: 0.00
Remaining Amount: 36,000.00
Remaining Percent: 100.00

Order Contract Options
 Allow Multicurrency PO
 Allow Open Item Reference
 Must Use Contract Rate Date
Rate Date: 08/26/2013

Cancelations

Lesson 5 – Exercise 5.4: Canceling a Contract

Reset to Dispatch to attach documents.

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

Document Management

[Return to Document Search](#)

SetID: STATE **Contract ID:** [42700-023-DHS0000200-0001](#)

Vendor: ADAMS EXTERMINATORS INC

Document Type: SPD Agency Services Contract

Description: Pest Control

Administrator: PSMITH01

Sponsor: **Department:**

Version: 1.00 **Created On:** 08/26/13 12:00AM [Document Details](#)

Status: Dispatched **Last Modified On:** 08/26/13 1:46PM

Redispatch

Execute Contract

Imported Document

View and Edit Options:

Review and Approval:

Other Document Actions:

[View Document](#)

[Internal Contacts/Signers](#)

[Send to Contacts](#)

[Edit Document](#)

[External Contacts/Signers](#)

[Recreate Document](#)

[Modify Attachments/Related Documents](#)

[Document View Access](#)

[Deactivate Document](#)

[Document Version History](#)

Cancelations

Lesson 5 – Exercise 5.4: Canceling a Contract

Attach all relevant documents.

View and Edit Options:

- View Document
- Edit Document
- Modify Attachments/Related Documents**
- Document Version History

Review and Approval:

- Internal Contacts/Signers
- External Contacts/Signers
- Document View Access

Other Document Actions:

- Send to Contacts
- Recreate Document
- Deactivate Document

Cancelations

Attachments and Related Documents

SetID STATE Contract ID 42700-023-DHS0000275-0001
Supplier ORKIN LLC

Upload another Document Attachment File

Attachments

Files	Description	Personalize	Find	First	1-2 of 2	Last
<input type="checkbox"/>						
<input checked="" type="checkbox"/>	PEST_CONTROL_CONTRACT_CANCELATION.docx	Cancelation Document	x	View		

Related Documents

Related Documents	Details	Personalize	Find	View All	First	1 of 1	Last
<input type="checkbox"/>	<input type="checkbox"/>	Ad Hoc	STATE				

OK Cancel

Lesson 5 – Exercise 5.4: Canceling a Contract

Return to contract Header.

[New window](#) | [Help](#) | [Custom](#)

Document Management

[Return to Document Search](#)

SetID: STATE Contract ID: **42700-023-DHS0000200-0001**

Vendor: ADAMS EXTERMINATORS INC

Document Type: SPD Agency Services Contract

Description: Pest Control

Administrator: PSMITH01

Sponsor: Department:

Version: 1.00 Created On: 08/26/13 12:00AM [Document Details](#)

Status: Executed Last Modified On: 08/26/13 3:42PM

Executed On: 08/26/13 3:42:12PM

[Reset to Dispatch](#)

[Create Amendment](#)

Imported Document

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

Review and Approval: [Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document Version History](#) [Document View Access](#)

Other Document Actions: [Send to Contacts](#)

[Deactivate Document](#)

Cancelations

There is no Amendment created for a canceled contract.

Lesson 5 – Exercise 5.4: Canceling a Contract

Change Renewal Status to Canceled.

Amount Summary	
Maximum Amount:	36,000.00 USD
Line Item Released Amount:	0.00
Category Released Amount:	0.00
Open Item Released Amount:	0.00
Total Released Amount:	0.00
<hr/>	
Remaining Amount:	36,000.00
Remaining Percent:	100.00

<input type="checkbox"/> Must Use Contract Rate Date	Rate Date:	08/26/2013
<input type="checkbox"/> Auto Default		
<input type="checkbox"/> Initial Period		Renewals
<input type="checkbox"/> Non-Profit	<input type="checkbox"/> Multi-Agreement	

Gross Amount:	0.00 USD
Freight Amount:	0.00

Cancelations

Contract Entry

Contract Renewals

SetID: STATE Contract Id: 42700-023-DHS0000200-0001

Renewal Status:	Cancelled	Renewal #:		of:	
Renewal from:		To:	12/30/2013		

OK Cancel Refresh

Uncheck Initial Period to change the Renewal Status to Canceled and enter the date the contract was canceled in the To field.

Lesson 5 – Exercise 5.4: Cancelling a Contract

Change the System Status to Canceled.

The screenshot shows a web-based contract management interface. The main area displays contract details for a contract with ID 42700-023-DHS0000200-0001. The status is set to 'Canceled'. A dialog box is overlaid on the screen, asking for confirmation to cancel the entire contract. The dialog box contains the following text: 'This action will cancel the entire contract. Continue? (10400,463)' and 'The action that you are taking will cancel the entire Contract. If you do not want to cancel the contract, then you cannot perform the action at this time.' There are 'OK' and 'Cancel' buttons at the bottom of the dialog box.

Contract Entry	
Contract	
SetID:	STATE
Contract ID:	42700-023-DHS0000200-0001
*Status:	Canceled
Administrator/Buyer:	PSMITH01
Contract Version	
Version:	1
Status:	Current
Approved Date:	08/26/2013
Authoring Document	
Authoring Status:	Executed
Header	
*Payment Terms ID:	N30
Process Option:	General Contract
Vendor:	ADAMSEXTER-00
*Vendor ID:	0000010645
*Begin Date:	09/01/2013
Expire Date:	12/30/2013
Renewal Date:	
Currency:	USD
Primary Contact:	RACINGREED3031@HOTMAIL.COM
Vendor Contract Ref:	
Description:	Pest Control

Amount Summary	
Maximum Amount:	36,000.00 USD
Line Item Released Amount:	0.00
Category Released Amount:	0.00
Open Item Released Amount:	0.00
Total Released Amount:	0.00

Cancellations

You will get a message that your action will cancel the contract.

Click OK . If you want to be able to re-award, indicate so.

Lesson 5 – Exercise 5.4: Cancelling a Contract

You must determine if you want to re-award the contract.

The screenshot displays a web-based contract management interface. At the top right, there are links for 'New Window' and 'Help'. The main heading is 'Contract Entry' with a sub-heading 'Contract'. The interface is divided into several sections:

- Contract Version:** Shows 'Version: 1', 'Status: Current', and 'Approved Date: 08/26/2013'.
- Contract Details:** Includes 'SetID: STATE', 'Contract ID: 42700-023-DHS0000200-0001', and '*Status: Canceled'.
- Administrators:** Lists 'Administrator/Buyer: PSMITH01'.
- Header Section:** Contains fields for '*Payment Terms ID: N30', 'Process Option: General Contract', 'Vendor: ADAMSEXTER-00', '*Vendor ID: 0000010645', '*Begin Date: 09/01/2013', 'Expire Date: 12/30/2013', 'Renewal Date', 'Currency: USD', and 'Primary Contact: RACINGREED3031@HOTMAIL.COM'.
- Amount Summary:** A table showing financial details:

Amount Summary	
Maximum Amount:	36,000.00 USD
Line Item Released Amount:	0.00
Category Released Amount:	0.00
Open Item Released Amount:	0.00
Total Released Amount:	0.00

A modal dialog box is centered on the screen, containing the text: 'Would you like to put the contract quantity back to the related sourcing award? (10400,537)'. Below the text are two buttons: 'Yes' and 'No'.

Lesson 5 – Exercise 5.4: Cancelling a Contract

Contract Entry
Contract

SetID: STATE Contract Version
Contract ID: 42700-023-DHS0000200-0001 Version: 1 Status: Current
*Status: Canceled Approved Date: 08/26/2013
Administrator/Buyer: PSMITH01 PSMITH01

▼ Authored Document
Authored Status: Executed

▼ Header
Payment Terms ID: N30
Process Option: General Contract
Vendor: ADAMSEXTER-0
Vendor ID: 0000010645
Begin Date: 09/01/2013
Expire Date: 12/30/2013
Renewal Date:
Currency: USD CRRNT
Primary Contact: 1 Contact Name: RACINGREED3031@HOTMAIL.COM
Vendor Contract Ref:
Description: Pest Control
Master Contract ID:
 Tax Exempt STATE OF GA
Fiscal Year 2014

Amount Summary
Maximum Amount: 36,000.00 USD
Line Item Released Amount: 0.00
Category Released Amount: 0.00
Open Item Released Amount: 0.00
Total Released Amount: 0.00
Remaining Amount: 36,000.00
Remaining Percent: 100.00

The document is either Dispatched or Executed, set the Status to Canceled may not be appropriate. (10430,44)
The Authored Document has been Dispatched or Executed, set the Contract Status to 'Canceled' may not be appropriate.

Click OK

OK

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

New Window | Help | Customize P

Lesson 5 – Exercise 5.4: Cancelling a Contract

▼ Voucher Contract Options

Invoice Number: Gross Amount: 0.00 USD
AP Business Unit: Freight Amount: 0.00
Accounting Template: Sales Tax Amount: 0.00
Basis Date Type: VAT Amount: 0.00
Misc Charge Amount: 0.00
Miscellaneous Charges Retention

From Line: To Line:
Item ID: Category:
Description: Manufacturer ID:
Vendor Item ID: Mfg Item ID:
Vendor's Catalog: Group ID:

Bypass Search Results Warn Before Autosaving

▼ Contract Items

Catalog Search Item Search Search for Contract Lines

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

Line	Item	Description	UOM	Category	Merchandise Amt						Include for Release	Status
1		Pest control	MON	91059	36,000.00						<input type="checkbox"/>	Cancelled

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

▼ Contract Categories

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

Line	Category	Description				Status
1						Cancelled

Lesson 5 – Exercise 5.4: Cancelling a Contract

The screenshot shows a web application interface for contract management. At the top, there are tabs for 'Contract', 'Crgate Release', and 'Review Releases'. The 'Contract' tab is active. The main area displays contract details for SetID: STATE, Contract ID: SWCS000546-043, and Administrator: EASONEH (Elizabeth H Eason). The status is set to 'Canceled'. A modal error message is displayed over the contract details, stating: 'Cannot cancel contract. At least one active transaction is referencing this contract. (10400,286)'. Below the error message is an 'Amount Summary' table.

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 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

Poll Question

True or False

Renewing a contract requires an amendment.

- a) True
- b) False

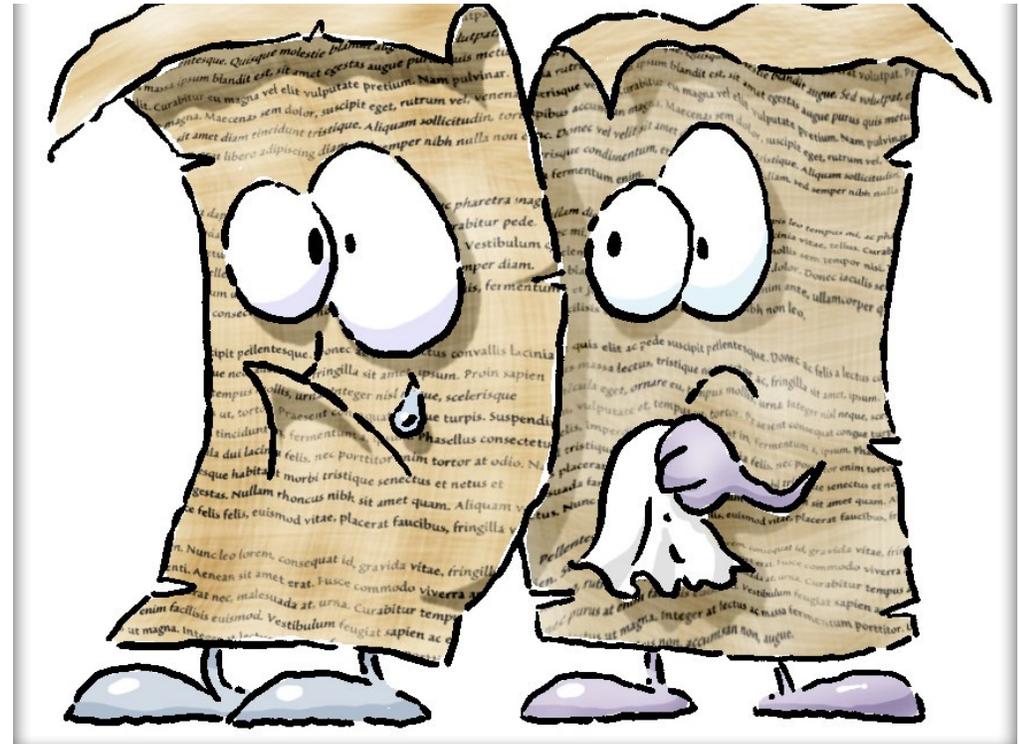


Poll Question

Select the best option

Which three of the amendment types should you always use?

- a) Amend Contract Only
- b) Amend Contract with Amendments
- c) Amendment File Only



Lesson 5: Summary



**Extending a Contract
(Unarmed Security Services)**



**Amending a Contract
(Unarmed Security Services)**



**Canceling a Contract
(Pest Control)**



**Renewing a Contract
(Trash Removal)**



**Closing a Contract
(Unarmed Security Services)**

Agency Contracts – Public Queries



Queries that are helpful in monitoring Supplier Contracts:

- ❑ **OSC003_CONTRACTS_BY_AGENCY**
 - Lists Supplier Contracts by Agency Business Unit (BU) that are not closed/cancelled.
- ❑ **OSC002_CONTRACTS_BY_BUYER**
 - Lists all contracts that are not closed/cancelled for a business unit and buyer.
- ❑ **OSC003C_ACTIVE_CNTRCTS_MAXAMT**
 - Lists Active Contracts with maxamt by business unit and expiration date (>, greater than entered date) specified.
- ❑ **OSC003D_ACTIVE_REQ_BY_CONTRACT**
 - Lists Active Requisitions linked to a Contract Id. Prompts for the Agency BU, and Contract ID [entered as a wild card (Like %)].
- ❑ **OSC048_AGENCY_INFLIGHT_PO** – Lists In-Flight POs on Agency Cntrct provided at Prompt.

Course Summary



**Closing and
Cancelling
Contracts**



**Creating Contracts
from Requisitions**



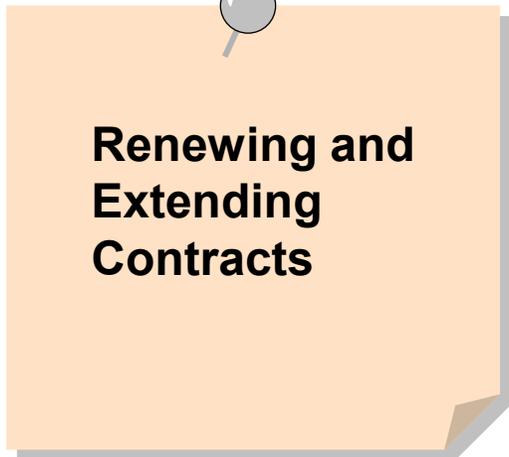
**Adding attachments
to contracts**



**Creating Contracts
from Sourcing
Events**



Amending Contracts



**Renewing and
Extending
Contracts**



Test Taking Troubleshooting Guide

Best Practices

- **Close multiple browsers**, browser windows, browser tabs or device – **CLOSE ALL BUT ONE BEFORE TAKING THE COURSE THROUGH TO COMPLETION**
- Launch **one test** at a time
- Actively launch in one window
- You are **timed out after five (5) minutes**. If you leave the computer for more than five (5) minutes, when you return, close the window and re-launch
- If your internet connection is lost, close the course window, and establish a stronger connection before re-launching
- The **Activity Tracking Window** must remain open

- **Check/Update Browser**
- Chrome 50 or higher
- Mozilla Firefox 45 or higher
- Safari 9 or higher

Additional Tips:

- Clear browser's cache or temporary Internet Files
- Disable Browser Extensions/Plug In's
- Disable Pop-Up Blockers



Course Evaluation

Enter this link in your web browser address field:

<https://www.surveymonkey.com/r/SPDvirtualtraining>



Buyer's Digest

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Congratulations

You have successfully completed the
course

**Supplier Contracts
Management**

State Purchasing Division



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