#### Teresa Page



- Procurement Contract functionality allows you to enter basic contract information in to PeopleSoft, once the contract has been finalized, so that you can track spend against it.
- This functionality does NOT assist in the creation of or execution of a contract.



- Institutions will use a shared SetID for procurement contracts 'POCON'.
  - Institutions will add/maintain their agency contract information in the POCON SetID.
  - Institutions will need a Contract Administrator. This person will add/maintain the agency contract information.
    - Contract Admins will have authority to view and edit any contract entered in the POCON SetID, even if it was entered by a different institution. Admins will need to be careful to only update contracts that have been entered for their institution.

**interactUSG** 

 USG & Statewide contracts will be added/maintained by the system office in the POCON SetID.

- Institutions must use the SHARE SetID suppliers in order to use the procurement contract functionality.
  - Procurement Contracts entered by the Institution will have a Contract ID that begins with the first 2 digits of their Business Unit. The contract ID field allows for 25 characters.

- USG contracts that are available for all to use will begin with a different identifier.
- Statewide Contract ID's will not be changed and will be entered into the system in the same format as they are received.

Security Roles & User Preferences

- Roles:
  - BOR\_PO\_CONTRACT\_ADMIN Contract Administrator
  - BOR\_PO\_CONTRACT\_INQUIRY Those who need inquiry access for Procurement Contracts
  - BOR\_PO\_CONTRACT\_REPORTS Those who need access to reports
- User Preferences:
  - Procurement link > Contract Process link here you will define default options as well as the type of action a Contract Admin can take

Contract Entry					
Find an Existing Value	Add a New Value				
SetID PO	CON Q				
Contract ID NE	хт				
Style ID GN	Q				
Contract Process Option General Contract					
Add					
Find an Existing Value   Add a	New Value				



Contract Entry					
Find an Existing Value	Add a New Value				
SetID	POCON Q				
Contract ID	98TESTCONTRACT				
Style ID	GN Q				
Contract Process Option General Contract					
Add					
Find an Existing Value   Add a New Value					



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▼ Header ⑦										
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*Supplier ID			Q							
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Expire Date							、 、			
Renewal Date					/	Amount Summary ? Maxin	num Amount	0.0	00 ι	ISD
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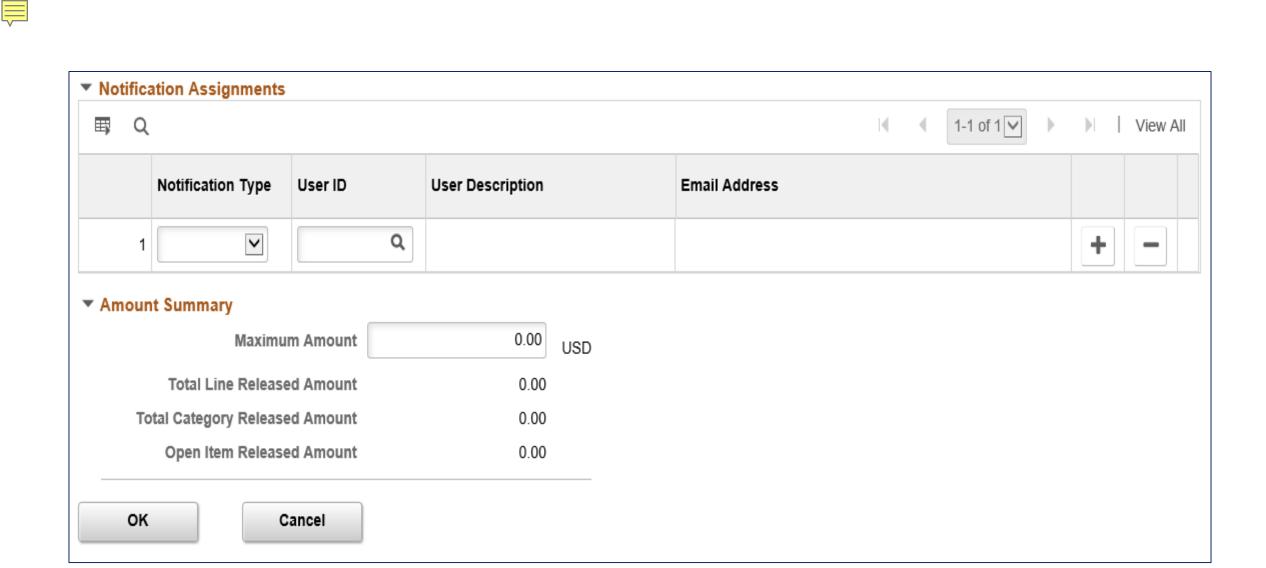
Contract Entry	

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	Status Open	New Version	Approval Due Date
Administrator	/Buyer Q		
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Process Option	General Contract	Contract Activities	Document Status
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		Thresholds & Notifications
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	Expire Date	Notify Days Before Expires
Expirat	on Notification Date	
Notify User when con	tract is within specified days of Renewal Date	)
	Renewal Date	Notify Days Before Renewal
Rene	val Notification Date	
Notify User when Nev	v Contract or Draft is within specified days of	Approval Due Date.
	Approval Due Date	Notify Days Before Approval
Approv	al Notification Date	
▼ Maximum Amou	Int Notification	
Notify User when the the maximum contract		n the specified amount , or within the specified percentage, of
Amount	Less than Maximum	USD
Percent	Less than Maximum	
	Notification Amount	







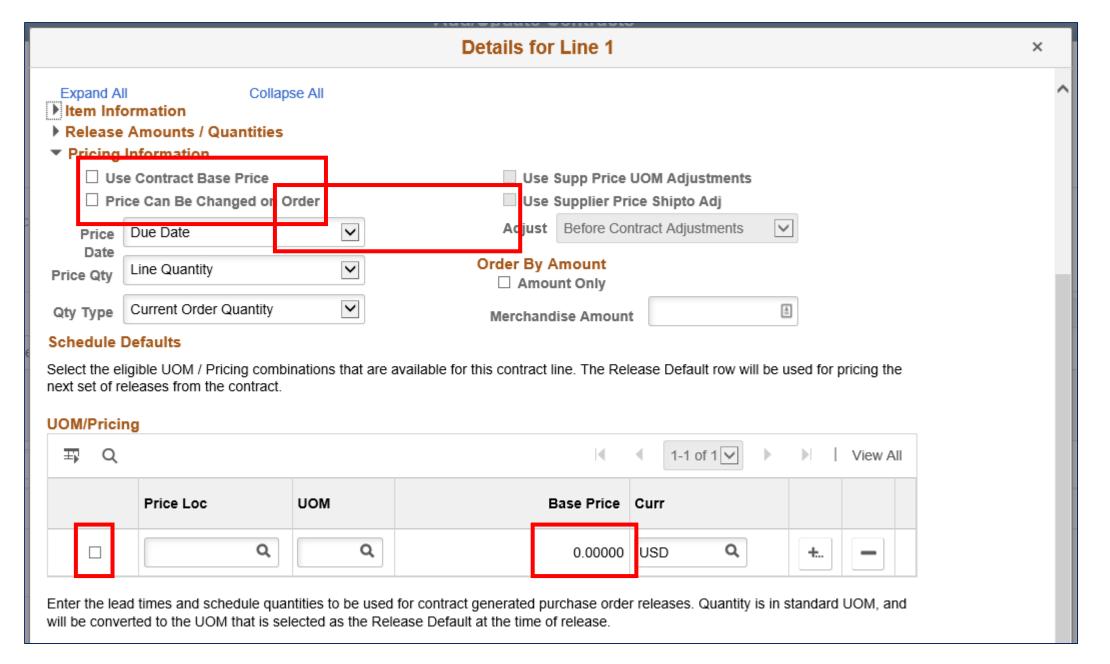
▼ Order Contract Options ⑦ ✓ Allow Multicurrency PO	Allow Open Item Reference	Must Use Contract Rate Date	Rate Date 09/19/2019
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Supplier Item ID	Suggest New Supplier	SHARE	0000032028	USG-SS-47200-17008		Approved	USG-SS-47200-1700	
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Line Details	
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Contract Information     (?)	
	Use Contract if Available
Contract ID	USG-SS-47200-17008 × Q
	Contract Details
Version	1
Contract Line	
Category Line	



Purchase Order						
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PO ID	NEXT		Budget Status	Not Chk'd		
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*Supplier	Q	Supplier Details				
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*Buyer	Q		*Dispatch Method		$\checkmark$	
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*PO Date 09/20/2019   *Supplier   *Supplier ID  *Buyer	Supplier Search Supplier Details	Contract Selection Criteria Contract SetID POCON Contract ID usg-ss	SetID POCON Contract ID begins with VUSG-SS
PO Reference Header Details PO Defaults PO Activities • Actions	Activity Summary Add Comments Add ShipTo Com	Allow Open Item Contract Only         Select Contract         Contracts         More Details         Select         Select         Select         Select         Select         Select	Search Results View 100 First  I-3 of 3 Last Contract ID Supplier Set ID Supplier ID Short Supplier Name USG-SS-47200-501544 SHARE 0000029567 CAMPUSLOGI-001 USG-SS-47200-17033 SHARE 0000006112 TOUCHNETIN-001 USG-SS-47200-17020 SHARE 0000003805 ELLUCIAN-002
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- When can I start?!
  - Institutions should plan to test in the FPLAY environment.
  - Institutions to let ITS know when they are ready to begin testing.



# Questions?

