



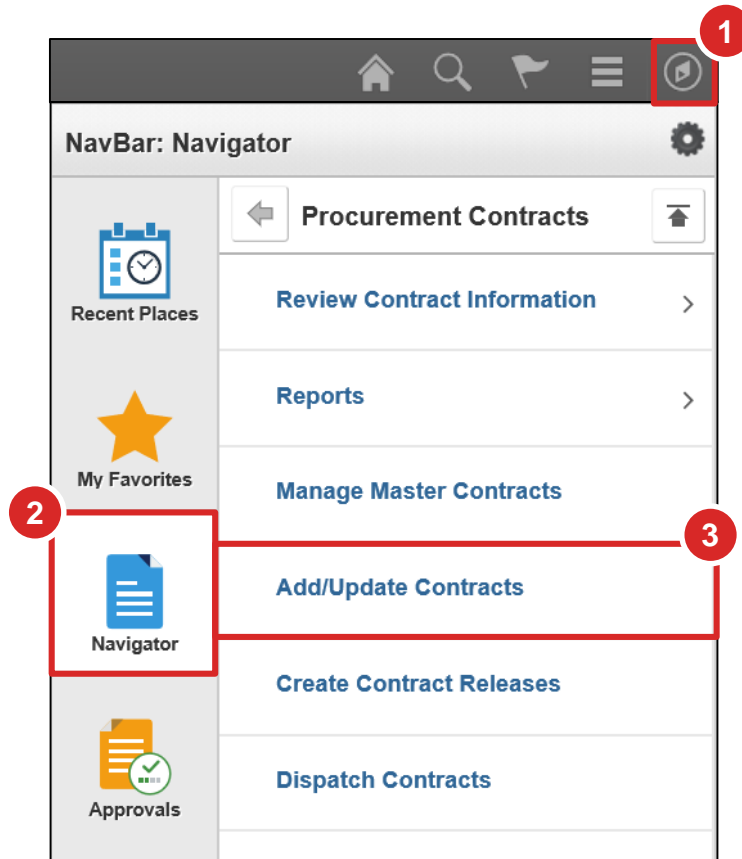
# Procurement Contracts

## Procurement Contracts Users

In order to procure products or services, users create a procurement contract with a supplier. These contracts go into SHARE FIN 9.2 as a module. The scenario shown below highlights the information needed to create a general procurement contract in SHARE FIN 9.2.

**Note:** Not all agencies use procurement contracts.

1. Click > **NavBar** Icon 
2. Click > **Navigator** 
3. Click > **Procurement Contracts** > **Add/Update Contracts**



# Procurement Contracts

## Creating a Procurement Contract (1 of 5)

4. Enter > **SetID** > **00000**
5. Enter > **Contract ID** or '**NEXT**' for auto assigned number
6. Enter > **Style ID** > **GN** for General Contract
7. Enter > **Contract Process Option** > General Contract for **Style ID**
8. Click > **Add**

**Contract Entry**

Find an Existing Value | Add a New Value

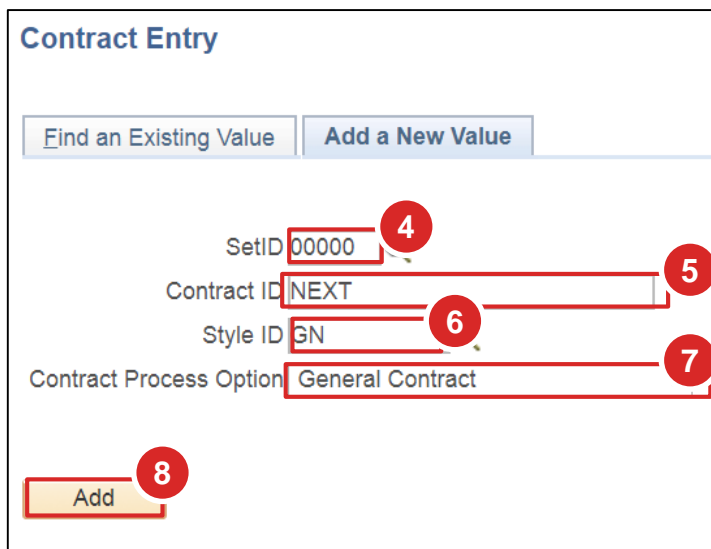
SetID  4

Contract ID  5

Style ID  6

Contract Process Option  7

8



# Procurement Contracts

## Creating a Procurement Contract (2 of 5)

9. Dropdown > **Status** > **Open**
10. Verify > **Contract Style** > **General Contract**
11. Enter > **Supplier ID**
12. Enter > **Begin Date**
13. Enter > **Expire Date**
14. Dropdown > **Contract Type**

Contract Entry  
Contract

SetID 00000 [Copy From Contract](#)

Contract ID NEXT

**\*Status** Open 9

Contract Version

Version 1 Status Current

New Version Approval Due Date  BT

Administrator/Buyer

▼ Header ?

**\*Contract Style** General Contract 10

Process Option General Contract

**\*Supplier**  [Supplier Search](#) 11

**\*Supplier ID**

**\*Begin Date** 09/13/2017 12

**Expire Date**  13

Renewal Date

Currency USD  CRRNT

Primary Contact

Supplier Contract Ref

Description

Master Contract ID  **\*Contract Type**  14

Tax Exempt ID

Tax Exempt

Add Comments  
Contract Activities  
Primary Contact Info  
Contract Releases

Activity Log  
Document Status  
Thresholds & Notifications

Amount Summary ?

Maximum Amount	<input type="text"/>	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

**Note:** Provide the **Master Contract ID** if there is a Master Contract for this contract.

# Procurement Contracts

## Creating a Procurement Contract (3 of 5)

15. Checkbox > **Allow Open Item Reference/Price Can Be Changed on Order**
16. Checkbox > **Auto Default**
17. Checkbox > **Corporate Contract**
18. Click > **PO Defaults** link

Contract Entry  
Contract

SetID 00000 [Copy From Contract](#)

Contract ID NEXT

\*Status Open

Administrator/Buyer

**Contract Version**

Version 1 Status Current

New Version Approval Due Date

**Header**

\*Contract Style General Contract

Process Option General Contract

\*Supplier Supplier Search

\*Supplier ID

\*Begin Date 09/13/2017

Expire Date

Renewal Date

Currency USD CRRNT

Primary Contact

Supplier Contract Ref

Description

Master Contract ID \*Contract Type

Tax Exempt ID

Tax Exempt

**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	

**Order Contract Options**

Allow Multicurrency PO

Corporate Contract

Lock Chartfields

[PO Defaults](#)

Allow Open Item Reference

Adjust Supplier Pricing First

Price Can Be Changed on Order

[Add Open Item Price Adjustments](#)

Must Use Contract Rate Date

Auto Default

\*Dispatch Method Print

Price Adjustment Template

Rate Date 09/13/2017

Dispatch

# Procurement Contracts

## Creating a Procurement Contract (4 of 5)

- 19. Enter > **Business Unit**
- 20. Enter > **Origin**
- 21. Enter > **Distributions**

Contract Defaults by BU

Contract Entry

PO Defaults

SetID 00000 Contract ID NEXT Version 1 Supplier ID

Header Find | View All First 1 of 1 Last

\*Business Unit  19 Copy from BU Defaults

Supp Loc

Buyer  20

Origin ONL  20 Billing Location

Currency  Tax Exempt

Payment Terms ID  Tax Exempt ID:

**Shipping Information**

Ship To  Ship To Address AM Business Unit

Location  Capitalize

IN Unit  Profile ID

Freight Terms  Cost Type

Ship Via  Ultimate Use Code

Charge By  Where Performed

**Distributions** Personalize | Find | View All

Distributions

*GL Unit	Fund	Dept	Account	Sub Acct	Rpt Cat	PC Bus Unit	Project	Activity
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

21

Add Comments

# Procurement Contracts

## Creating a Procurement Contract (5 of 5)

- 22. Enter > **Description**
- 23. Enter > **UOM**
- 24. Enter > **Category**
- 25. Enter > **Merchandise Amt**
- 26. Click > **Save**

The screenshot displays a software interface for creating a procurement contract. It features two main sections: a 'Lines' table and a 'Contract Categories' section. The 'Lines' table has columns for Line, Item, Description, UOM, Category, Merchandise Amt, Include for Release, and Status. Red callouts 22, 23, 24, and 25 point to the Description, UOM, Category, and Merchandise Amt fields respectively. The 'Contract Categories' section has a similar table with columns for Line, Category, Description, and Status. At the bottom, a 'Save' button is highlighted with a red callout 26. Other buttons like 'Notify', 'Refresh', 'Add', 'Update/Display', and 'Correct History' are also visible.

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

Line	Category	Description	Status
1			Active

Buttons: Save, Notify, Refresh, Add, Update/Display, Correct History

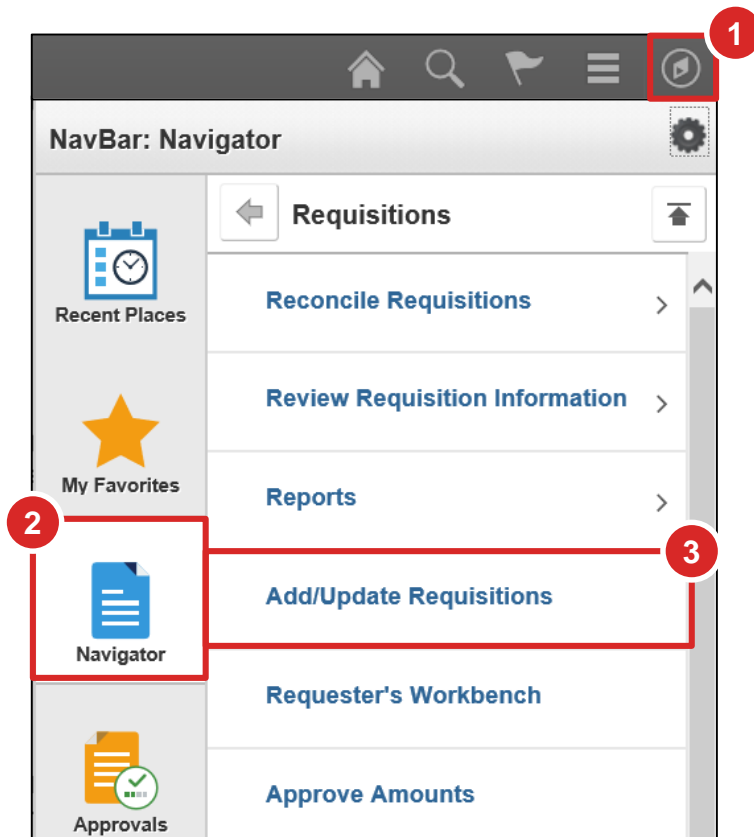
# Procurement Contracts

## Tying a Procurement Contract to a Requisition (1 of 2)

Once a module has been created and approved in SHARE FIN 9.2, a user can tie it to a requisition. It is important to tie all documents created from this contract together.

**Note:** Not all agencies use requisitions. If your agency does not require a requisition, you may skip ahead to 'Copying a Procurement Contract to a Purchase Order' in page 11 of this job aid.

1. Click > **NavBar** Icon 
2. Click > **Navigator** 
3. Click > **Purchasing > Requisitions > Add/Update Requisitions**



# Procurement Contracts

## Tying a Procurement Contract to a Requisition (2 of 2)

Create the requisition through the normal process, and then tie the Procurement Contract to the line item details section.

4. Click > **Contract** tab
5. Enter > **Contract ID**
6. Select > **Contract Line** (If there is a contract line in the contract)
7. Click > **Supplier Information** tab

Confirm the supplier information tab is completed and correct.

**Note:** If the **Supplier Information** tab is filled out prior to selecting the **Contract ID**, as it will only show contracts for that supplier.

8. Click > **Save**



The screenshot shows a software interface for managing procurement contracts. At the top, there are several tabs: Details, Ship To/Due Date, Status, Supplier Information (highlighted with a red box and number 7), Item Information, Attributes, Contract (highlighted with a red box and number 4), and Sourcing Controls. Below the tabs is a table with columns: Line, Item, Description, Contract ID (highlighted with a red box and number 5), Contract Version, Contract Line (highlighted with a red box and number 6), Category Line Number, and Use Contract if Available. At the bottom left, there are three buttons: Save (highlighted with a red box and number 8), Notify, and Refresh. The interface also includes search icons and a '\*Go to ... More...' link.

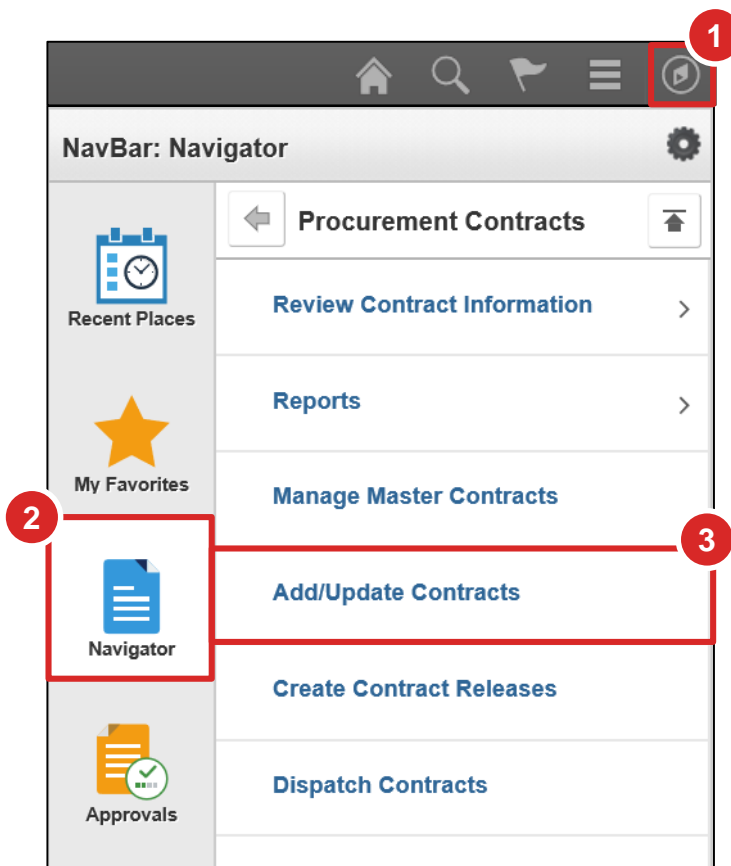


# Procurement Contracts

## Create a Procurement Contract as a Purchase Order (1 of 2)

This part of the job aid shows the initial steps to creating a module in SHARE FIN 9.2 as a purchase order. These purchase orders will also be used for the vouchering process.

1. Click > **NavBar** Icon 
2. Click > **Navigator** 
3. Click > **Procurement Contracts > Add/Update Contracts**



# Procurement Contracts

## Create a Procurement Contract as a Purchase Order (2 of 2)

4. Click > **Add a New Value** Tab
5. Enter > **Contract ID**
6. Enter > **Style ID** > **PO** with **Contract Style: Purchase Order**
7. Click > **Add**

The screenshot shows the 'Contract Entry' form with the following elements and callouts:

- 4**: A red box highlights the 'Add a New Value' button at the top right of the form.
- 5**: A red box highlights the 'Contract ID' field, which contains the text 'NEXT'.
- 6**: A red box highlights the 'Style ID' dropdown menu, which is currently set to 'General Contract'.
- 7**: A red box highlights the 'Add' button at the bottom left of the form.



Continue to enter the necessary information into the **Contract Entry** page and save the Procurement Contract. For more information on key fields for this page, please see page 2 of this job aid.

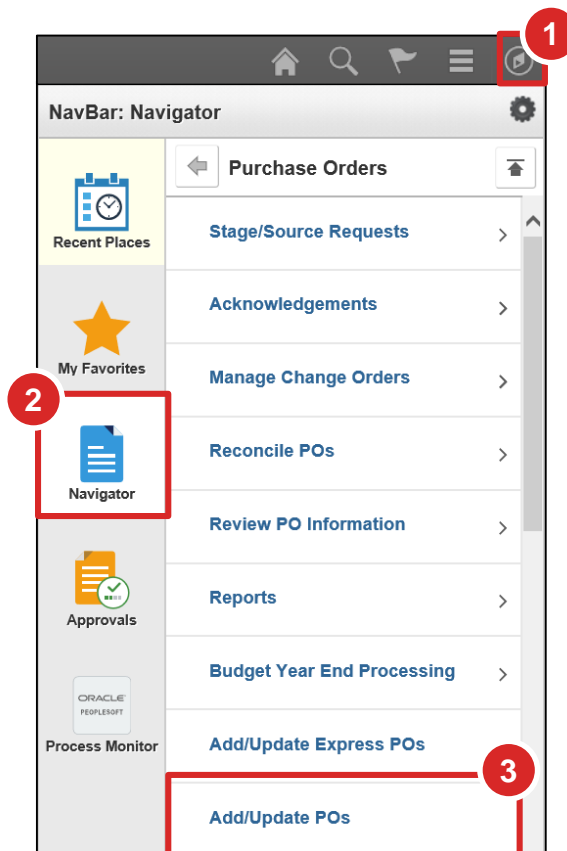
# Procurement Contracts

## Copying a Procurement Contract to a Purchase Order (1 of 3)

After creating and approving the module in SHARE FIN 9.2, users can copy this procurement contract to a purchase order. It is important to tie all contract documents together for more accurate reporting on spend.

**Note:** If your agency uses requisitions and you tie the requisition to the contract, then you can create the PO from the requisition.

1. Click > **NavBar** Icon 
2. Click > **Navigator** 
3. Click > **Purchasing** > **Purchase Order** > **Add/Update PO**



# Procurement Contracts

## Copying a Procurement Contract to a Purchase Order (2 of 3)

4. Click > **Add a New Value** tab
5. Enter > **Business Unit**
6. Click > **Add**

The screenshot shows the 'Purchase Order' form. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected and highlighted with a red box and a red circle containing the number 4. Below the tabs, there is a 'Business Unit' field with the value '34100' entered. This field is also highlighted with a red box and a red circle containing the number 5. Below the 'Business Unit' field is a 'PO ID' field with the value 'NEXT' entered. At the bottom of the form, there is an 'Add' button highlighted with a red box and a red circle containing the number 6.

7. Dropdown > **Copy From** > **Contract**

The screenshot shows the 'Maintain Purchase Order' form. At the top, there is a 'Business Unit' field with the value '34100' and a 'PO ID' field with the value 'NEXT'. Below these fields is a 'Copy From' dropdown menu highlighted with a red box and a red circle containing the number 7. At the bottom of the form, there is a 'Header' button with a question mark icon.

# Procurement Contracts

## Copying a Procurement Contract to a Purchase Order (3 of 3)

8. Enter > **Contract ID**

9. Click > **OK**

Copy Purchase Order from Contract

Contract Selection Criteria

Contract SetID 00000

Contract ID  **8**

Allow Open Item Contract Only

Supplier

Supplier ID

Master Contract

Search

Select Contract

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

Select	SetID	Contract	Description	Supplier ID	Begin Date	Expire Date
<input type="checkbox"/>						



**9**

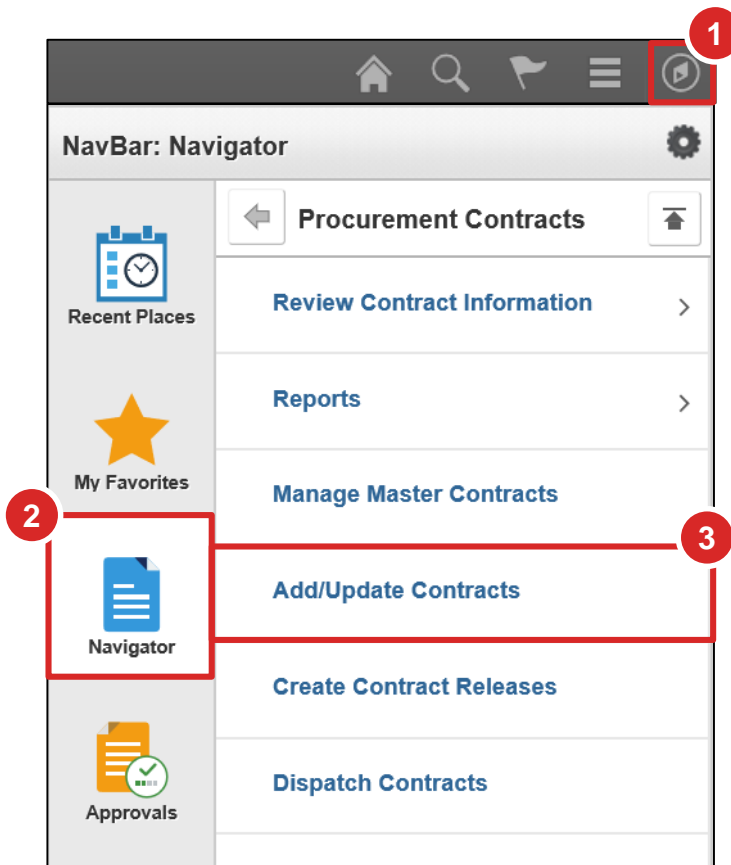
Continue to enter the necessary information for the Purchase Order and save the PO.

# Procurement Contracts

## Cancelling a Procurement Contract (1 of 3)

Users will have the ability to cancel a procurement contract in SHARE FIN 9.2. This job aid highlights the main steps for cancelling the contract.

1. Click > **NavBar** Icon 
2. Click > **Navigator** 
3. Click > **Procurement Contracts** > **Add/Update Contracts**



# Procurement Contracts

## Cancelling a Procurement Contract (2 of 3)


4. Click > **Find an Existing Value** tab
5. Enter > **SetID**
6. Enter > **Contract ID**
7. Click > **Search**

**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 = ▼ 00000  **5**


Contract ID begins with ▼  **6**


Contract Version = ▼


Version Status = ▼

Contract Style begins with ▼  

Contract Process Option = ▼


Short Supplier Name begins with ▼  

Supplier Name begins with ▼  

Master Contract ID begins with ▼  

Description begins with ▼

**Correct History**    **Case Sensitive**

**7** **Search**   **Clear**   **Basic Search**  **Save Search Criteria**

# Procurement Contracts

## Cancelling a Procurement Contract (3 of 3)

8. Dropdown > **Status** > **Cancelled**
9. Click > **OK**

The screenshot displays the 'Contract Entry' interface. At the top, the 'Contract' section shows 'SetID 00000', 'Contract ID TS04062', and '\*Status Canceled'. A red circle with the number '8' highlights the 'Canceled' status. To the right, the 'Contract Version' section shows 'Version 1', 'Status Current', and 'Approved Date 11/13/2014'. Below this, the 'Administrator/Buyer' section is visible. The 'Header' section contains various contract details: 'Contract Style General Contract', 'Process Option General Contract', 'Supplier VILLAGE OF-040', 'Supplier ID 0000054454', 'Begin Date 11/13/2014', 'Expire Date 09/30/2015', 'Renewal Date', 'Currency USD CRRNT', and 'Primary Contract'. A message dialog box is open in the foreground, displaying the text: 'Cannot cancel contract. At least one active transaction is referencing this contract. (10400,286)'. A red circle with the number '9' highlights the 'OK' button in the dialog box.

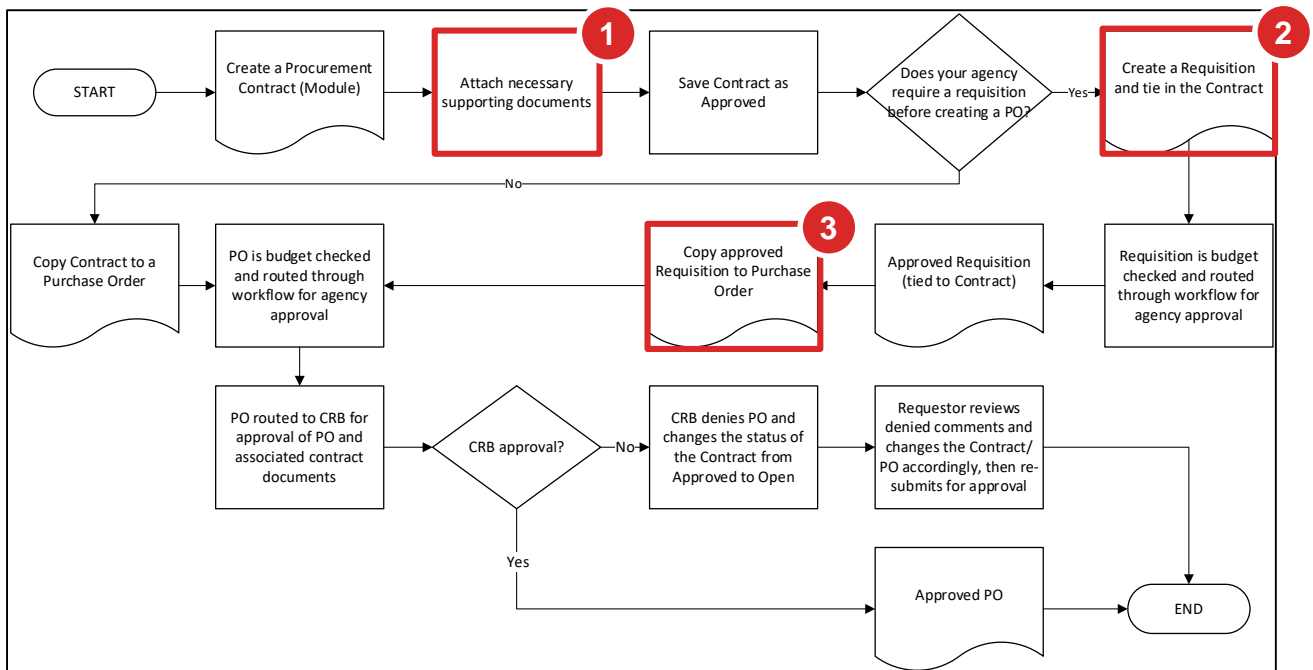
**Note:** SHARE FIN 9.2 will not allow a current contract to be updated to cancelled if there is an active transaction tied to the contract.



# Procurement Contracts

## With PO Origin as CRB (1 of 2)

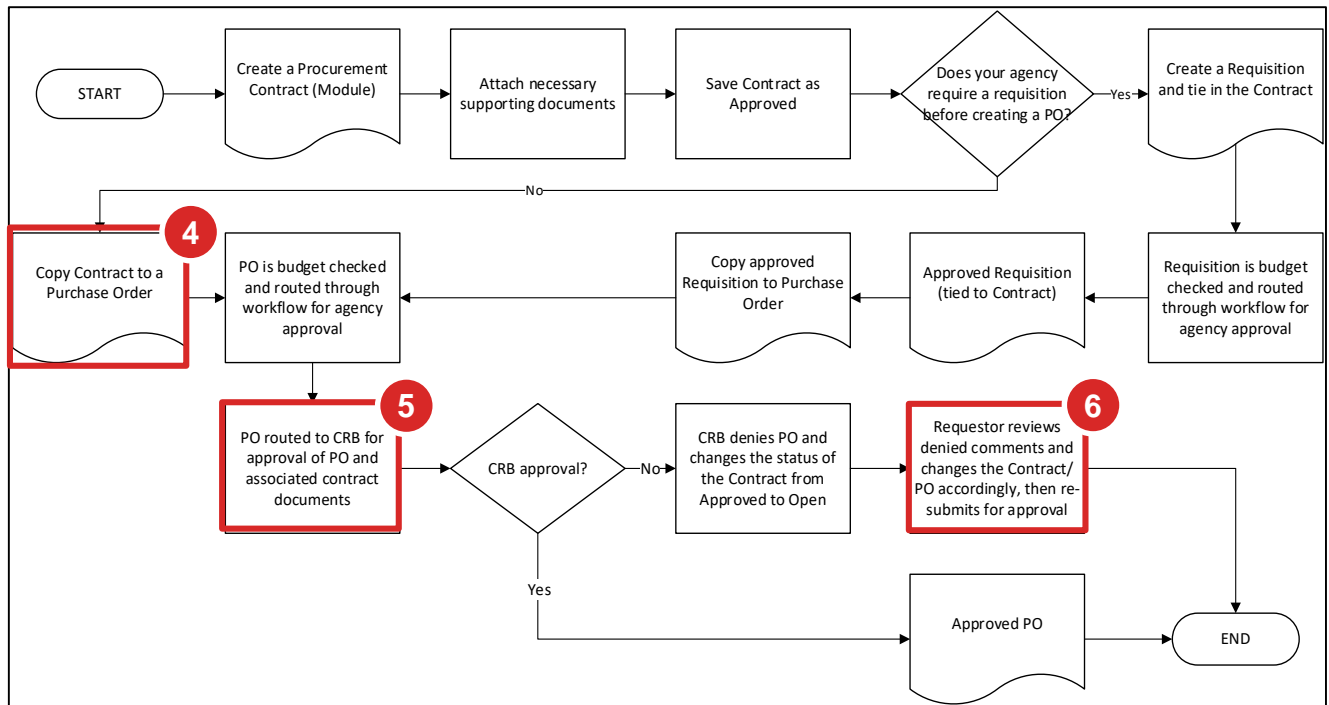
The below process flow highlights the overall process for creating a procurement contract with **Origin Type CRB**.



1. Attach the Documents to the contract before saving.
  - Documents that require original signatures for CRB approval can be scanned and uploaded, but the originals will still need to be included in the packet sent to CRB
  - The original signatures needed are:
    - **DFA Agency Certification** (must be DFA's Agency Certification, not agency's)
    - **Affidavit of Former Employment**
    - **Brief submitted with contract/packet**
    - **Sole Source Determination Form**
    - **Contract**
2. See [page 6](#) of this job aid for requisitions.
  - Add the **Origin CRB**
3. Note that the **Origin** does not copy over when creating the Purchase Order. Users will need to re-enter the **PO Origin** of CRB when creating the PO.

# Procurement Contracts

## With PO Origin as CRB (2 of 2)

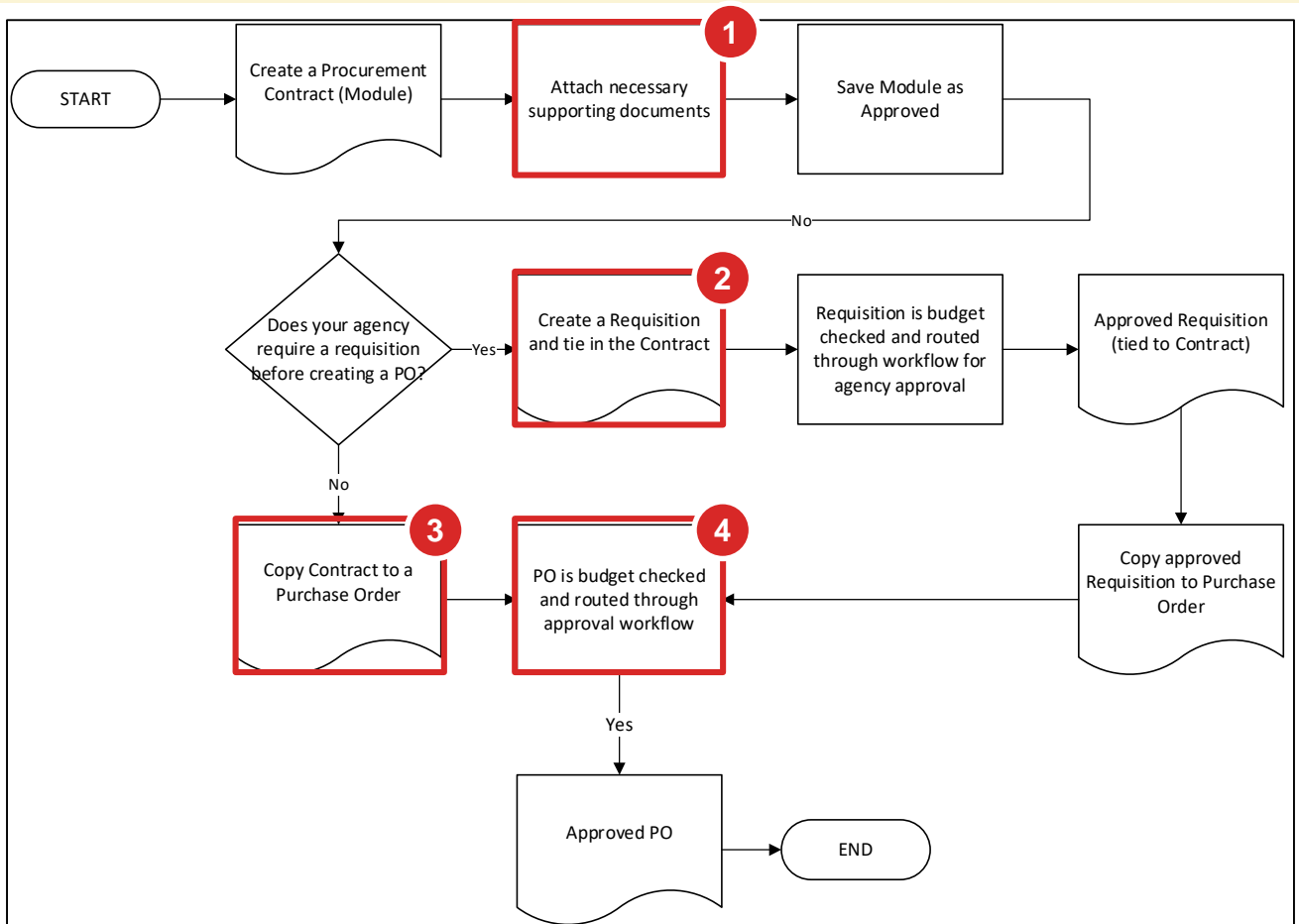


4. See [page 10](#) of this job aid with information on copying a contract to a PO.
  - Add the **PO Origin CRB**
5. When the **PO Origin CRB** is used, the workflow will route the Module to CRB for approval after the two levels of agency approvals. CRB will review the physical packet and the Module, PO, and attachments in SHARE FIN 9.2. They will then approve or deny the Purchase Order.
  - **Approve:** If CRB approves the PO, they will sign the physical contract and update the date on the brief. If a user sees an approved PO, they can confirm that CRB has reviewed and approved their physical packet and Module in SHARE FIN 9.2
  - **Denied:** If CRB denies the PO, they will add comments to the PO on why it was denied. These will be sent to the user who submitted the PO.
6. Requestor will review the comments and make changes to the Module in SHARE FIN 9.2 or send any additional paperwork missing from the packet, and re-submit the Purchase Order for approval.

# Procurement Contracts

## With no PO origin or PO origin NOT CRB

The below process flow highlights the best practices for creating a Procurement Contract in SHARE FIN 9.2.



1. Attach documents to the Contract before saving.
2. See [page 6](#) for information on tying requisitions to procurement contracts.
3. See [page 10](#) for information on tying POs to procurement contracts.
4. The Purchase Order will be sent through the workflow for approval. It will have two levels of agency approval, and if the PO is over \$5k, it will also be sent to DFA for approval.