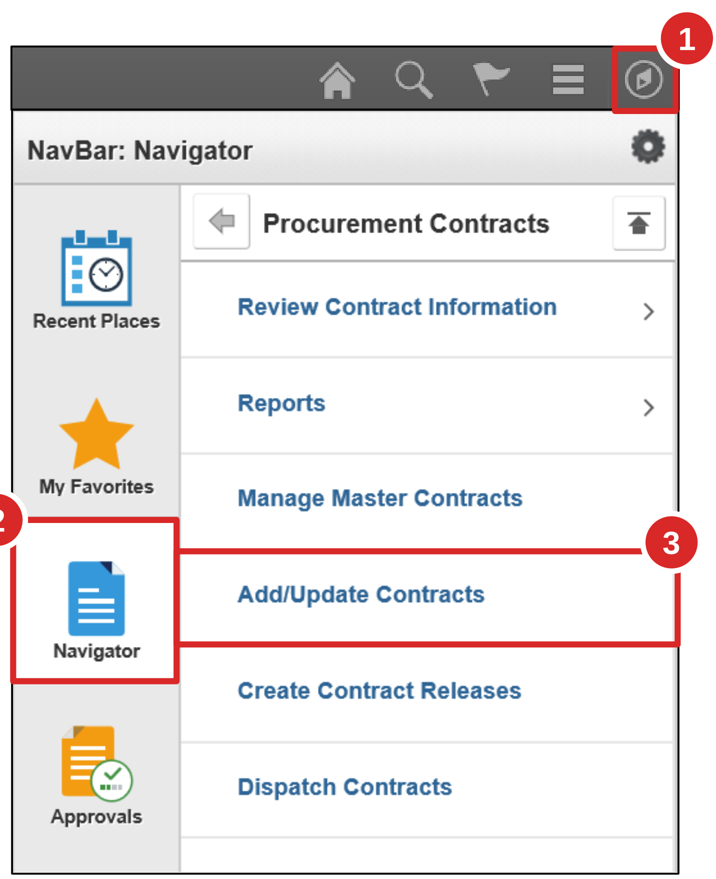
Procurement Contracts

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.

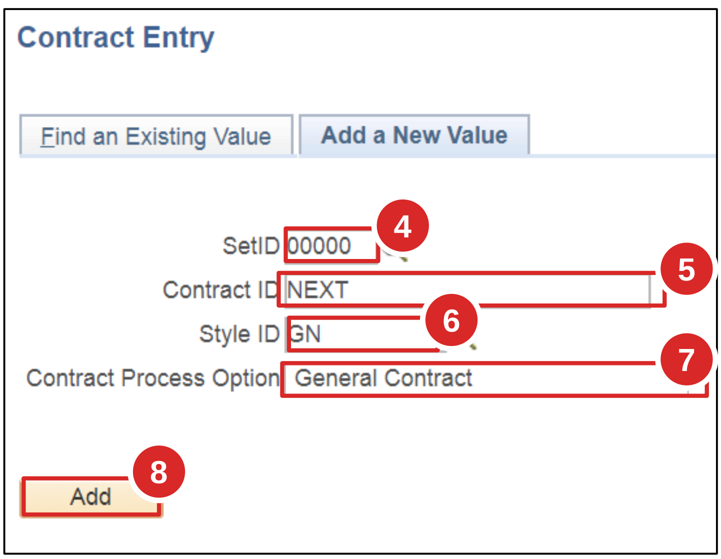
1. Click > **NavBar** Icon
2. Click > **Navigator**
3. Click > **Procurement Contracts** > **Add/Update Contracts**



Procurement Contracts

Creating a Procurement Contract (1 of 5)

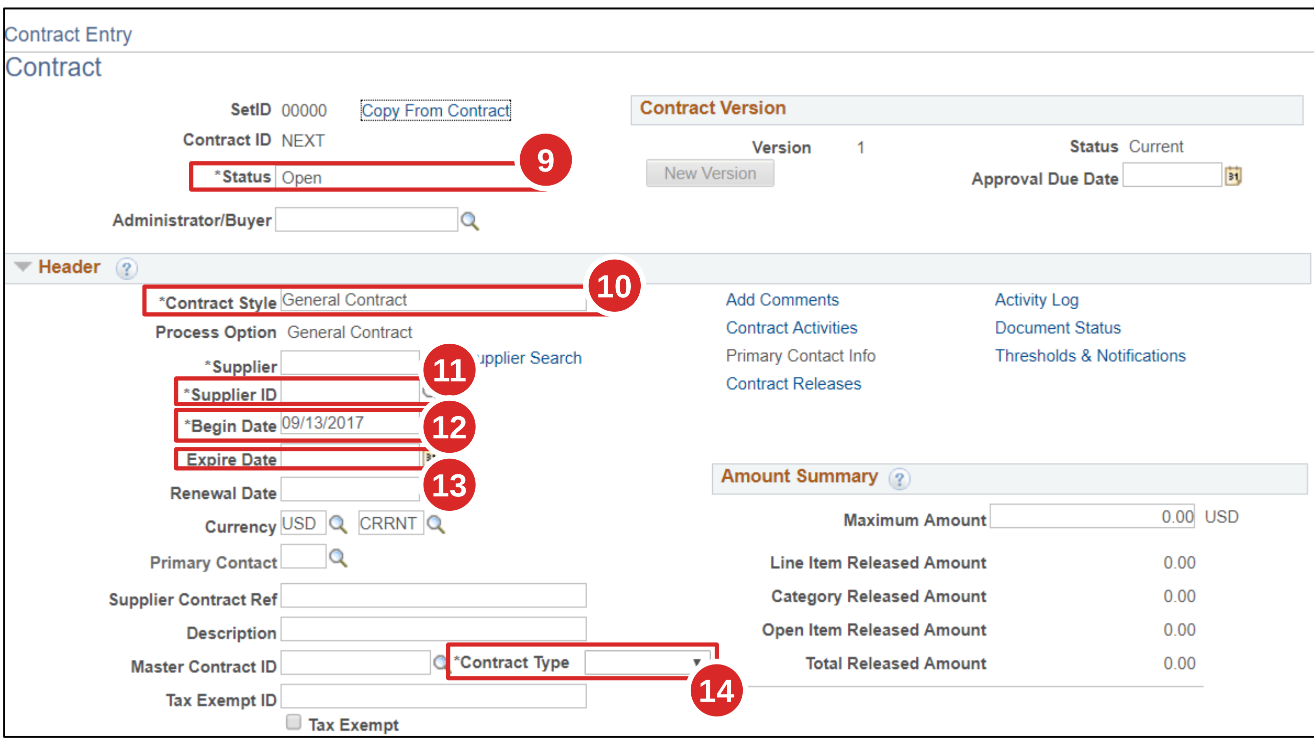
4. Enter > **SetID** > **00000**
5. Enter > **Contract ID** or **‘NEXT’** for auto assigned number
6. Enter > **Style ID** > **GN** for General Contract
7. Enter > **Contract Process Option** > General Contract for **Style ID**
8. Click > **Add**



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**

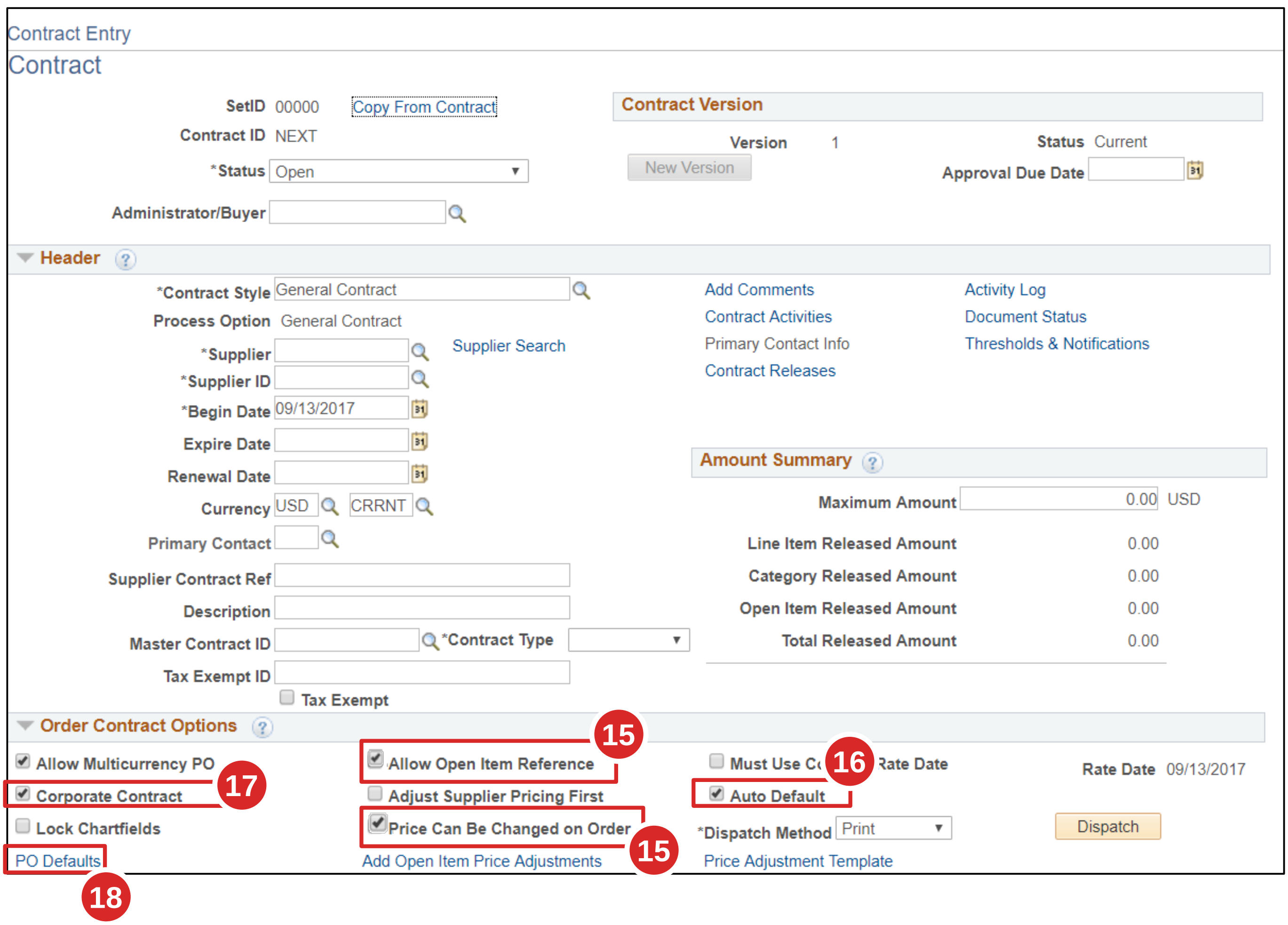


Note: Provide the **Master Contract ID** if there is a Master Contract for this contract.

Procurement Contracts

Creating a Procurement Contract (3 of 5)

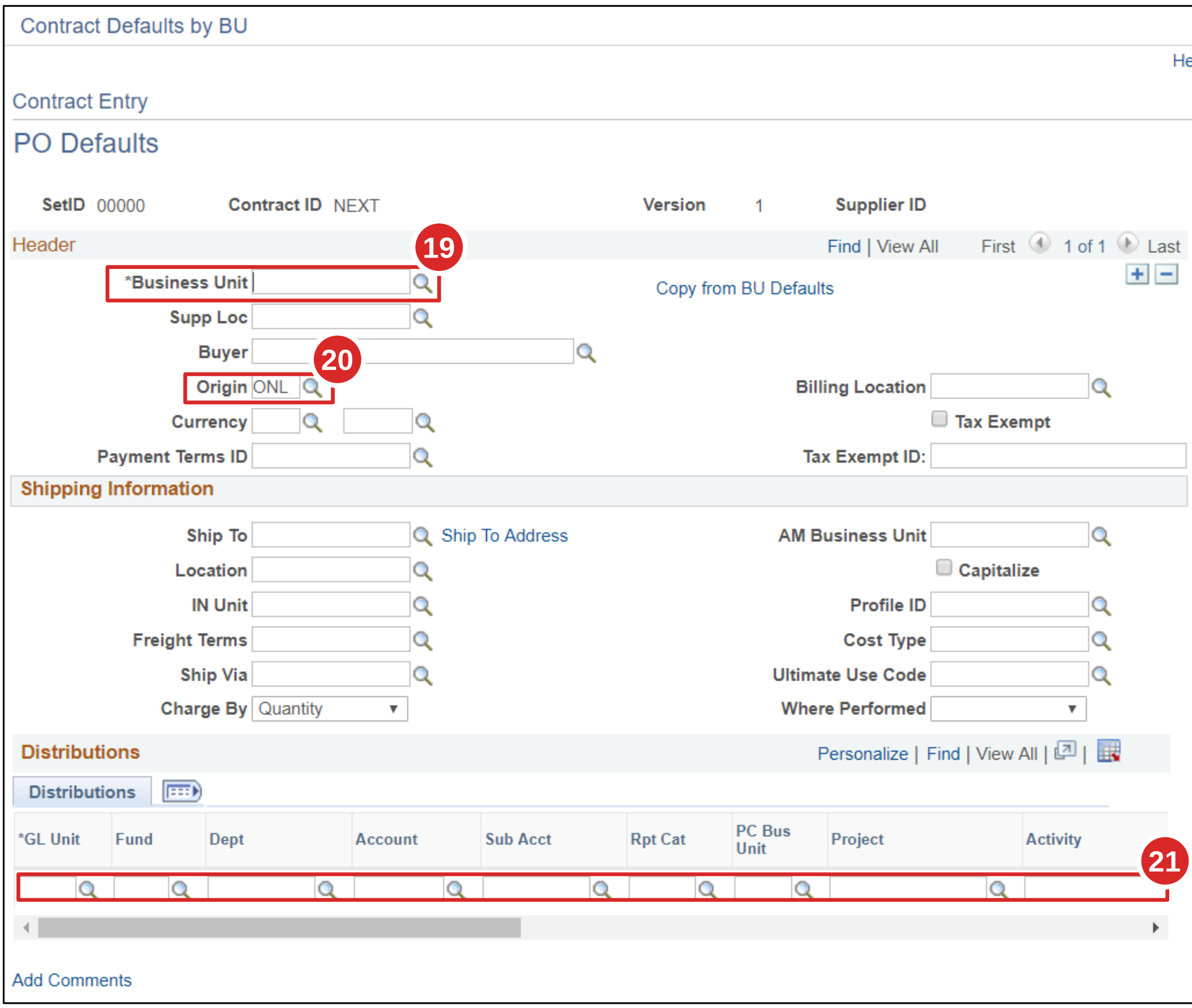
15. Checkbox > **Allow Open Item Reference/Price Can Be Changed on Order**
16. Checkbox > **Auto Default**
17. Checkbox > **Corporate Contract**
18. Click > **PO Defaults** link



Procurement Contracts

Creating a Procurement Contract (4 of 5)

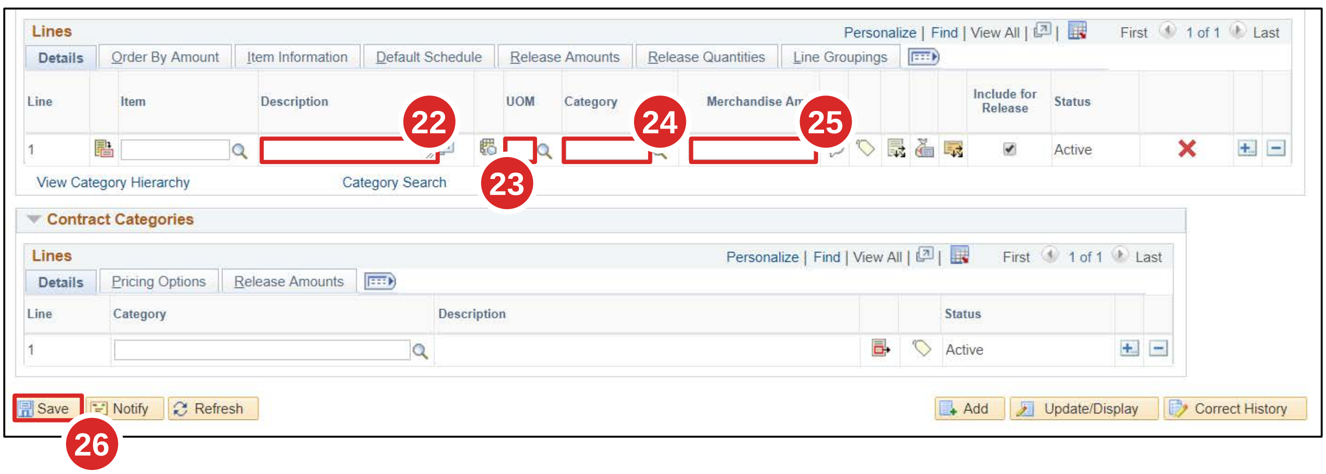
19. Enter > **Business Unit**
20. Enter > **Origin**
21. Enter > **Distributions**



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**



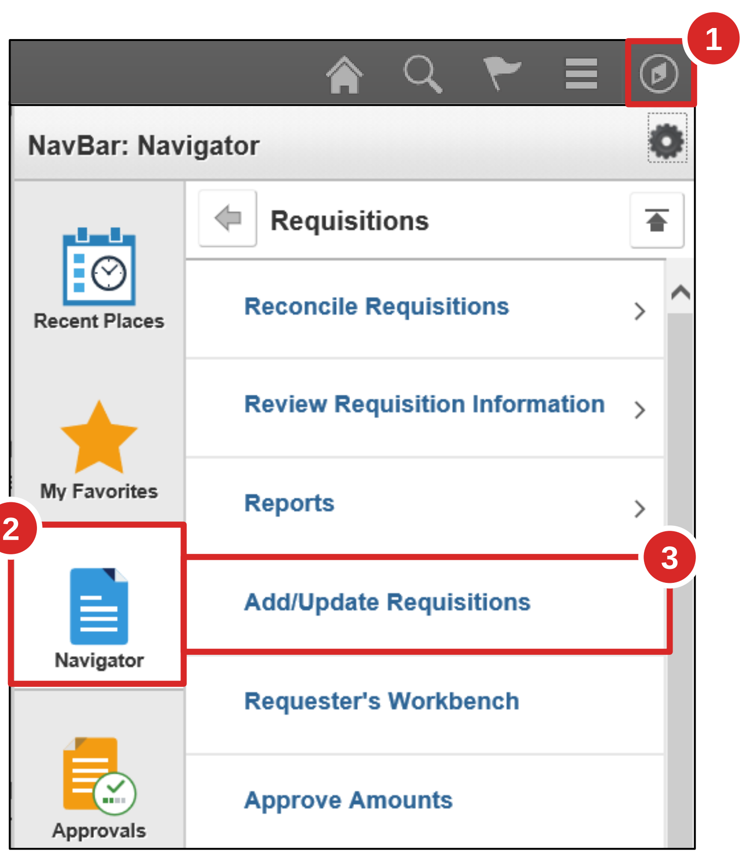
Procurement Contracts

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.

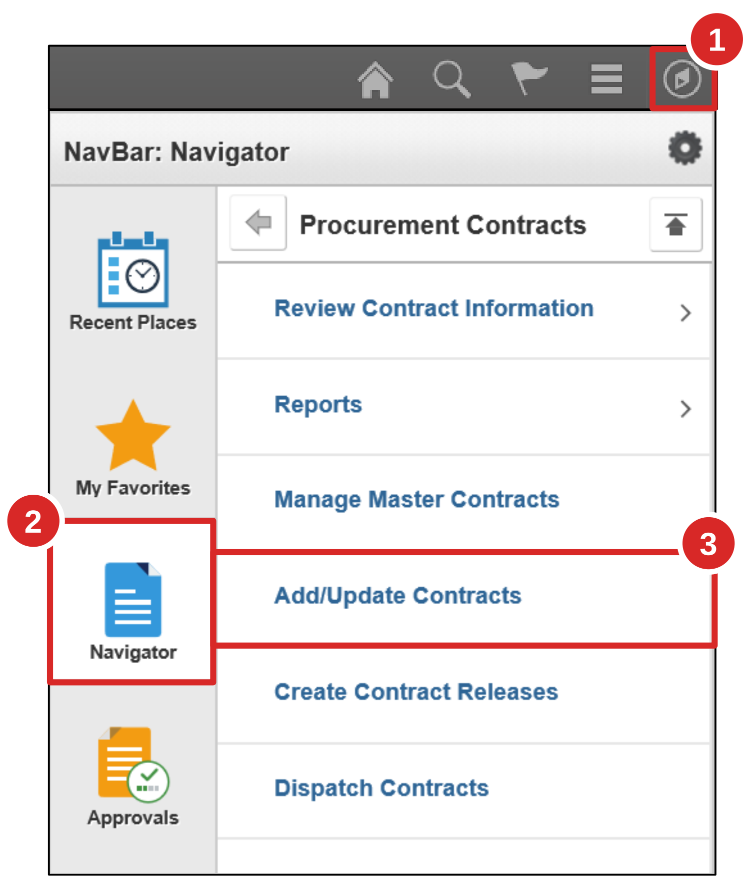
8. Click > **Save**

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.

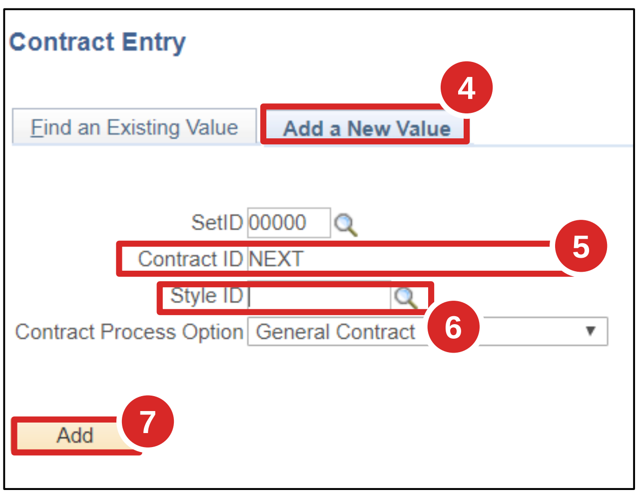
1. Click > **NavBar** Icon
2. Click > **Navigator**
3. Click > **Procurement Contracts** > **Add/Update Contracts**



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**



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.

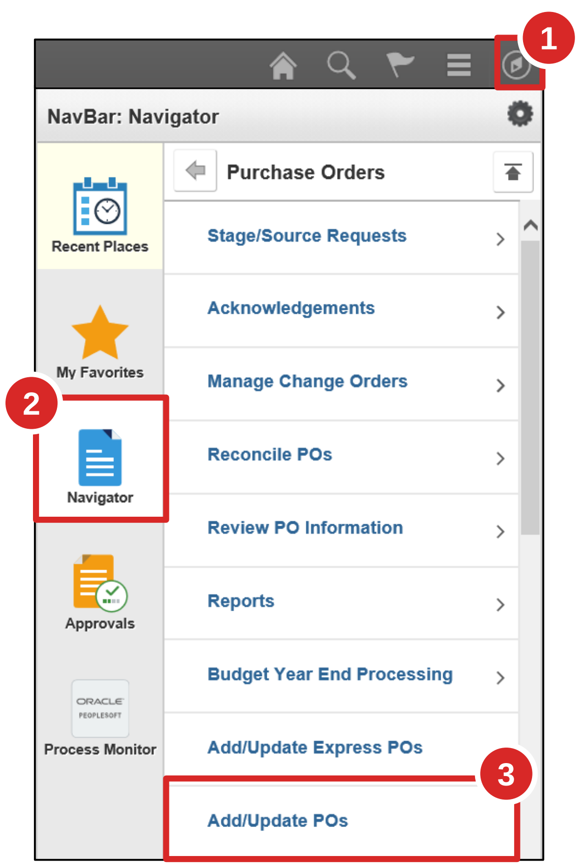
Procurement Contracts

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.

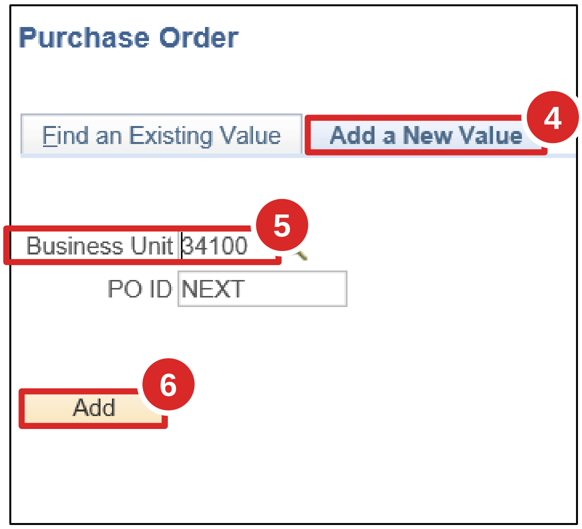
1. Click > **NavBar** Icon
2. Click > **Navigator**
3. Click > **Purchasing** > **Purchase Order** > **Add/Update PO**



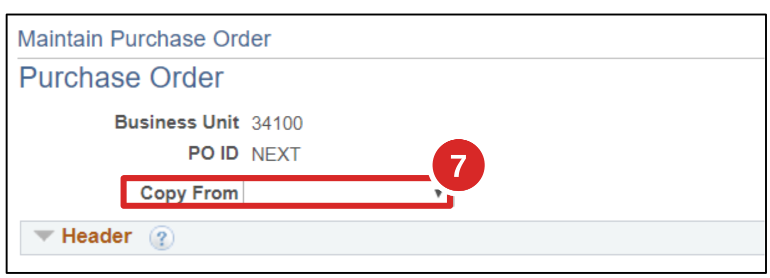
Procurement Contracts

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**



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



Procurement Contracts

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

8. Enter > **Contract ID**
9. Click > **OK**

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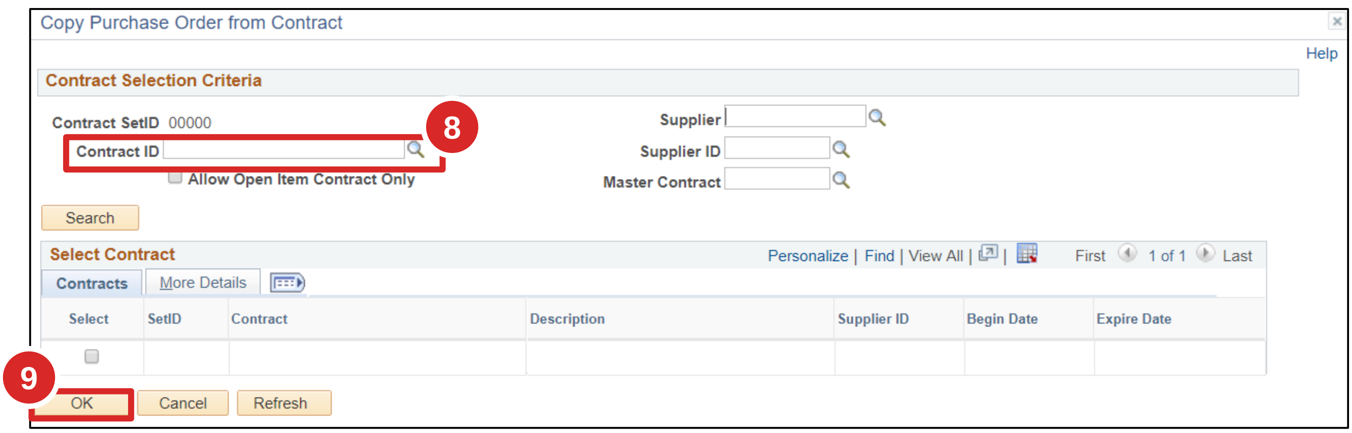


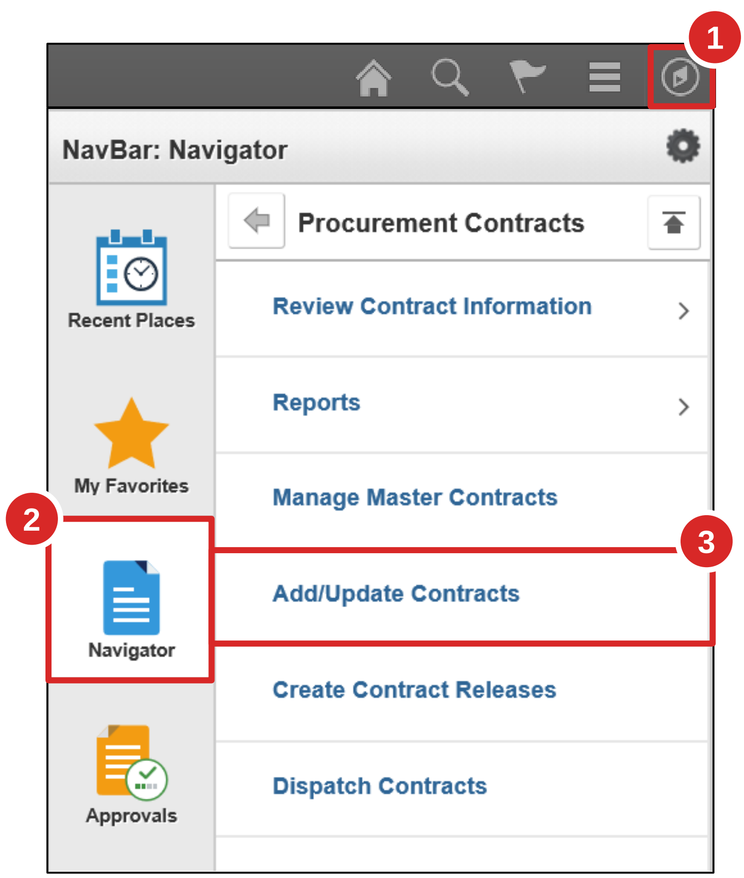
Continue to enter the necessary information for the Purchase Order and save the PO.

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.

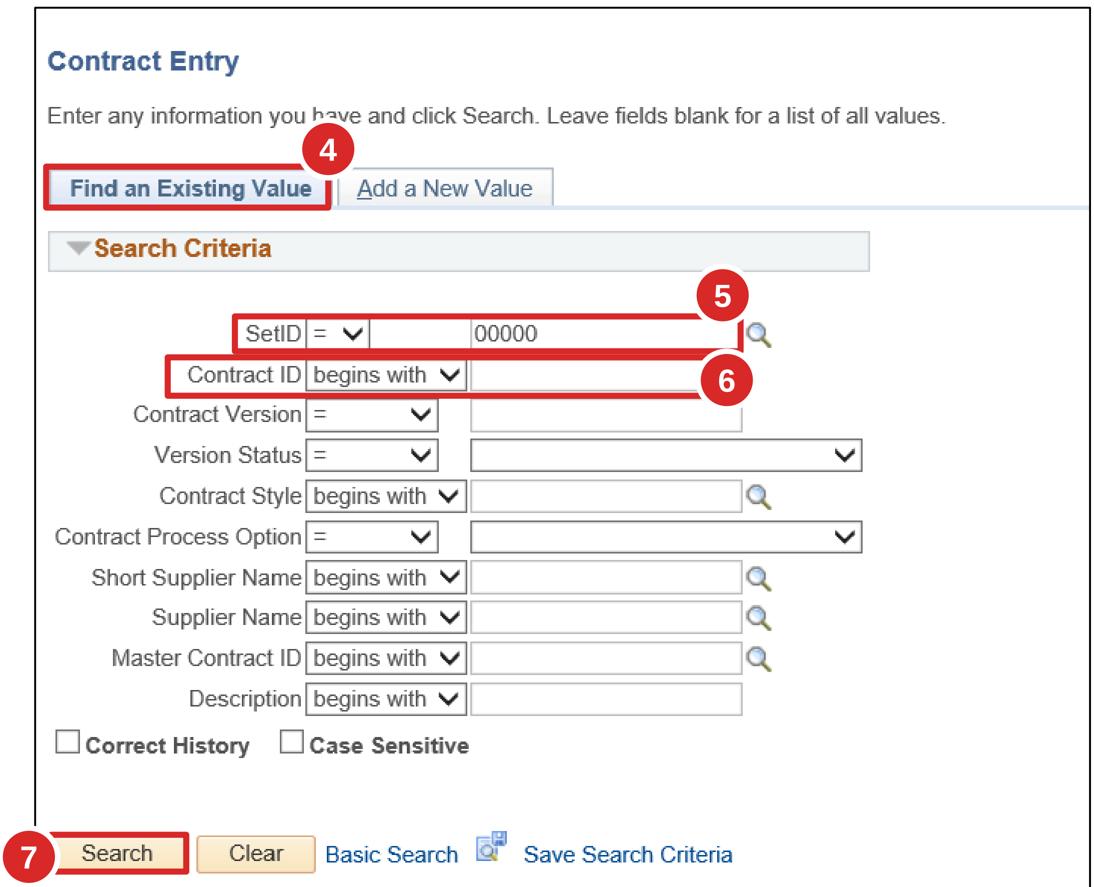
1. Click > **NavBar** Icon
2. Click > **Navigator**
3. Click > **Procurement Contracts** > **Add/Update Contracts**



Procurement Contracts

Cancelling a Procurement Contract (2 of 3)

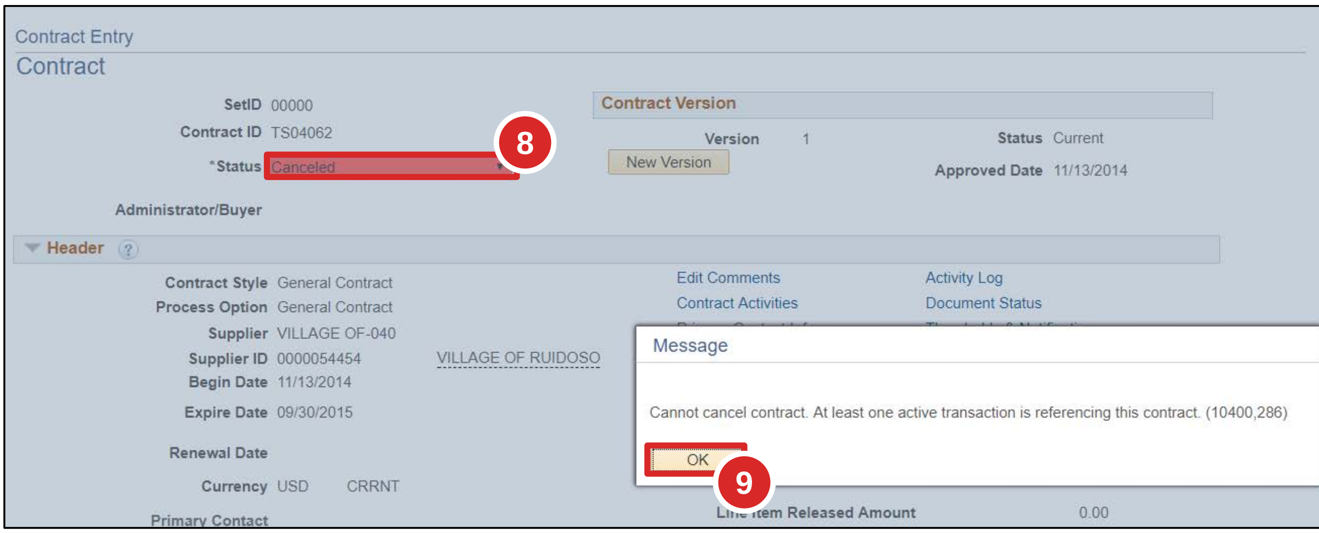
4. Click > **Find an Existing Value** tab
5. Enter > **SetID**
6. Enter > **Contract ID**
7. Click > **Search**



Procurement Contracts

Cancelling a Procurement Contract (3 of 3)

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

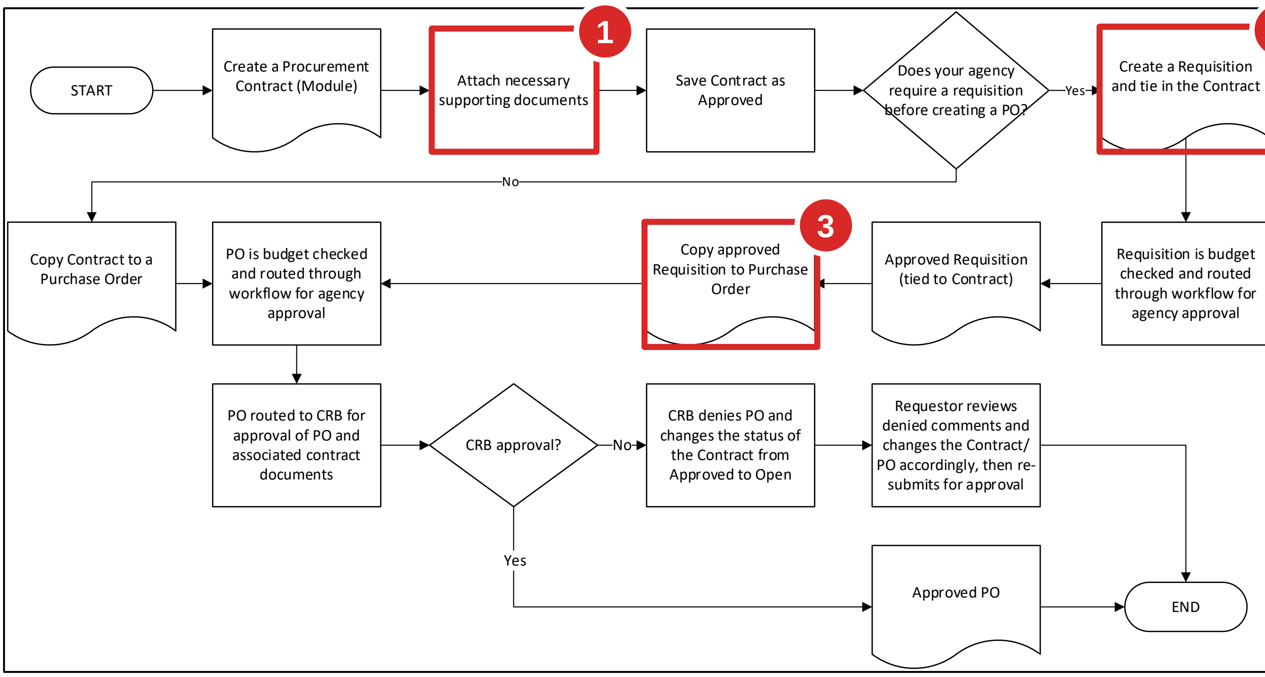


Note: SHARE FIN 9.2 will not allow a current contract to be updated to cancelled if there is an active transaction tied to the contract.

Procurement Contracts

With PO Origin as CRB (1 of 2)

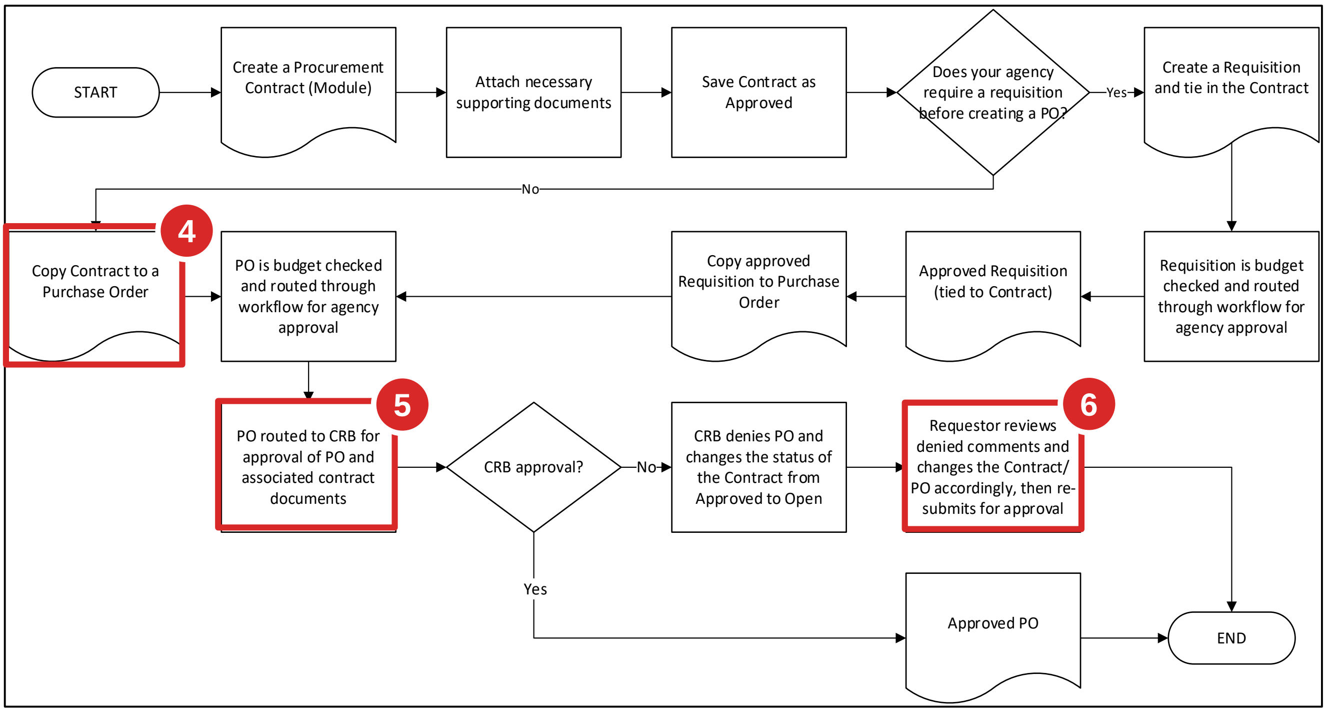
The below process flow highlights the overall process for creating a procurement contract with **Origin Type CRB**.



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)

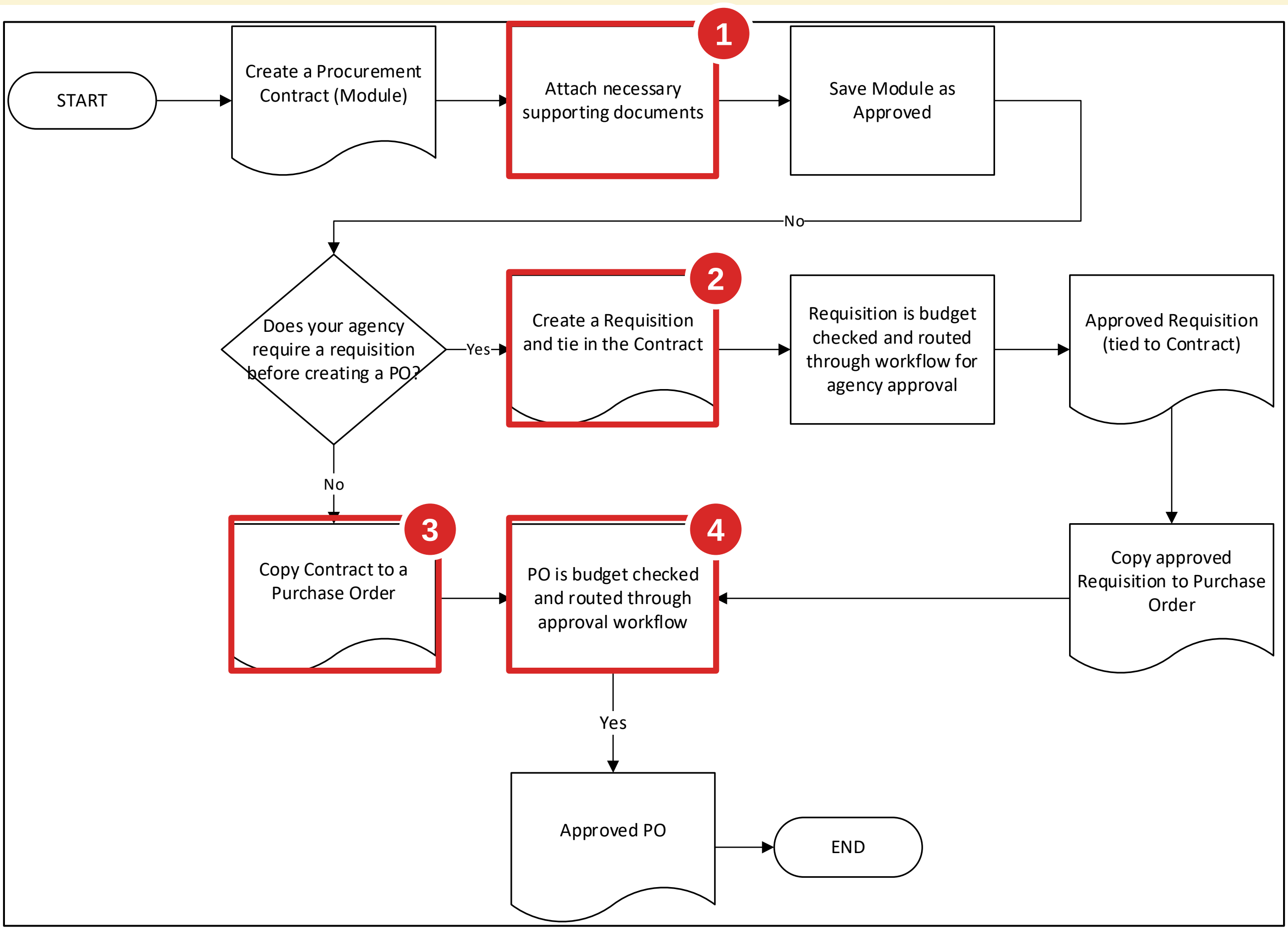


4. See page 10 of this job aid with information on copying a contract to a PO.
   - Add the **PO Origin CRB**
5. When the **PO Origin CRB** is used, the workflow will route the Module to CRB for approval after the two levels of agency approvals. CRB will review the physical packet and the Module, PO, 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.