

MAGIC Contract User Manual

Table of Contents

| Manual Version History | 4 |
|---|----|
| Introduction | 5 |
| Contract Process | 5 |
| Key Terms and Definitions | 7 |
| MAGIC Security Roles and Definitions | 8 |
| Logon Instructions | 8 |
| Unit 1 – Create a Contract | 9 |
| Contract Types | 9 |
| Contract Categories (Header Tab) | 10 |
| Job Aid 1.1 – Create a Manual Contract | 11 |
| Job Aid 1.2 – Create a Contract from an RFx | 20 |
| Job Aid 1.3 – Contracts with Distributor or Fulfillment Vendors | 22 |
| Job Aid 1.4 – Contracts with Price Lockdowns | 23 |
| Job Aid 1.5 – Create a Contract with Options | 24 |
| Job Aid 1.6 – Create an Emergency Contract | 31 |
| Job Aid 1.7 – Create a Contract with Reference to a Shopping Cart | |
| Unit 2 – Modify a Contract | 41 |
| Job Aid 2.1 – Amend a Contract | 41 |
| Job Aid 2.2 – Terminate a Contract | 44 |
| Unit 3 – Contract Review and Approval | 47 |
| Contract Workflow | 47 |
| Approval Types | 47 |
| Contract Statuses | 49 |
| Job Aid 3.1 – Review, Edit, Approve, or Reject a Contract | 50 |
| Unit 4 – Contract Reports | 52 |
| Job Aid 4.1 – Download a Contract | 52 |
| Job Aid 4.2 – Contract Management Report | 55 |

| Job Aid 4.3 – Contract Information Added to the ME2K, ME2L, and ME2N Reports | 57 |
|--|----|
| Unit 5 – Additional Job Aids (Helpful Tips) | 58 |
| Job Aid 5.1 – Search for Converted Contracts in MAGIC | 58 |
| Job Aid 5.2 – Setting Contract Alerts | 60 |
| Job Aid 5.3 – Compare Contract Versions | 63 |

| Manual Version History | | | |
|------------------------|--------------|------------------|------------------------------|
| Version | Date Updated | Job Aids Updated | Brief Description of Updates |
| 1 | 6/6/2024 | | Original Document |

Introduction

Contract Process

There are 3 possible starting points for the contract creation process

- 1. Create a contract manually without reference to an existing document
- 2. Create a contract with reference to a shopping cart (will not detail in this course)
- 3. Create a contract from an accepted RFx

Contracts are managed in the MAGIC portal via Supplier Relationship Management (SRM).

A contract shell can be created when line items are entered directly, or imported from a Shopping Cart or RFx.

Upon completion the contract is sent to the appropriate oversight agencies for approvals (OPTFM, ITS, AG, MSPB and OPSCR).

The Contract and related attachments are also available in Records Management. Records management acts as an electronic "file cabinet" for all of the documents generated within MAGIC.



All contract types use the same basic steps in contract creation.



Steps:

- 1. Determine the Contract Type
- 2. Complete Header and Line Item information
- 3. Apply Condition Types (If Necessary)
- 4. Add any Attachments or Notes
- 5. Assign Distribution (If Necessary)
- 6. Release to Workflow for Approval

NOTE: If necessary, assign ad-hoc approvers before releasing (optional)

Some oversight agencies have detailed instructions for contract, reference when applicable.

| Key Terms and Definitions | | | |
|----------------------------------|--|--|--|
| Term | Definition | | |
| Assign Distribution | Distribution is used to replicate contracts from SRM to ECC for direct invoicing (i.e. to create invoices referencing contracts without creating purchase orders) | | |
| Buy on Behalf of | The 'Buy on Behalf of' process is used by ITS when creating contracts on behalf of other agencies. ITS creates a contract with the requesting agency being identified by the location on the contract. This authorizes only the requesting agency to utilize the contract. | | |
| Contract Alerts | Alerts can be set up to notify you if an existing contract is about to expire, or when release quantities and release values hit a predefined threshold. | | |
| Item Category | Can be either Normal or Product Category. Normal is used when specifying items and pricing, whereas Product Category is used to identify a more generic grouping of items. | | |
| Personal Objects Worklist (POWL) | The central place for accessing procurement transactions. It contains helpful utilities such as shopping cart details, search functionality, status, and personalization features. | | |
| Product Category | The 5-digit NIGP code. | | |
| Product ID | The 11-digit NIGP code. | | |
| Universal Worklist (UWL) | A tool that allows you to manage tasks, receive alerts, and handle notifications from multiple sources. | | |

MAGIC Security Roles and Definitions

Description: MAGIC business roles define the system privileges related to an employee's area of responsibility. Access provided by the business role(s) determines what a user can see or do in MAGIC.

The complete list of available roles and definitions can be viewed under the MAGIC drop-down on the MMRS Security webpage at https://www.dfa.ms.gov/mmrs-security.

Logon Instructions

Description: The following steps provide instructions to access the MAGIC Contract System.

| | Steps | Additional Information |
|----|---|--|
| 1. | Click the MAGIC link from the <u>DFA website</u> or use the direct link to the <u>MAGIC Portal</u> . | |
| 2. | Enter your Username and Password. | For assistance with your Username or Password, please contact the MMRS Call Center at mash@dfa.ms.gov. |

Unit 1 – Create a Contract

Contract Types

Contract types are used to identify various contracts. Contract types cannot be modified after the selection has been made. If the incorrect contract type is selected, the contract must be deleted and created again with the correct contract type.

| Term | Definition |
|------|---|
| BRCT | BRICKS Construction |
| BRLE | BRICKS Lease |
| CNTR | General Purchasing |
| EMEC | Emergency Contract |
| EPLC | Express Products List |
| LSAG | Legal Services |
| MDOT | MS Dept. of Transportation Construction |
| OREQ | Oversight Request |
| SOLC | CNTR/Oversight Appr. |
| SWCT | Statewide Contract |

| Contract Categories (Header Tab) | | |
|----------------------------------|------------------------------|--|
| Categories | Categories | |
| N/A | Agency/Gov Authority | |
| ITS-CP1 | Agency-Quotes | |
| ITS-EPL | BOB-Other | |
| ITS-Exemption * | BOB-Professional | |
| ITS-Master Agreement | BOB-Real Property Management | |
| OPTFM-COMP | GSA | |
| OPTFM-Cooperative | LEGAL* | |
| OPTFM-NEGC | MDOT-Construction | |
| OPTFM-P1* | MDOT-Service | |
| BOB Construction | PSCRB-Pre-Approved Vendor | |
| BOB Furniture & Equipment | PSCRB-SP1* | |

* Indicates most used categories.

Agencies can select the appropriate Oversight Approval.



4. Enter the Valid From/To dates. The dates can be selected by using the pop-up calendar is and clicking the arrows to select the dates or enter the dates manually.

| | Supplier * 3100000019 |
|-----|---|
| | Valid From / To: * 01/27/2014 1 - 01/26/2015 |
| | Purchasing Organization: |
| | Purchasing Group: 1 30 H 1 2 3 4 5 |
| | Thems 3 13 14 15 16 17 18 19 |
| | Details Select Add 4 20 21 22 23 24 25 26 Pacts C |
| | Line Number Item C 6 3 6 7 6 A er Prod |
| | (Petersage |
| 5. | Enter the Target Value of all materials to be released against the contract by entering the amount in the Target Value/Currency field. |
| | Contract Name 1130-14-C-CNTR-00057 |
| | Contract Owner. 45586 SUPER6521 |
| | Target Value/ Currency 100000.00 USD |
| 6. | Click on the Header tab. |
| | Overview Header ttems |
| | |
| 7. | Use the scroll bar 🔽 on the right side of the screen to scroll down the page . |
| 8. | If an Expiration Alert is desired, click in the Alert Expiration Days field, then enter the number of days for the alert. |
| | Dates |
| | Valid From / To: * 01/28/2014 0 - 01/27/2015 |
| | Alert Expiration 45 Day(s) |
| 9. | To enter an Alert Release Value, enter the percentage in the Alert Release Value field. |
| | Alert Release Value: 80 % |
| 10 | Use the scroll bar 🔄 on the right side of the screen to scroll up the page . |
| 11. | Click on the Additional Information tab. |
| | Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking Basic Data Condition Exchange Rate Thresholds Distribution Notes and Attachments Output Additional Information Payment |
| 12 | Click on the Request Type drop-down arrow, then select the desired request type from the drop-down list. |

| Request Type: * | |
|--|--|
| Contract Colpeon: * Nov. | |
| and the second s | |
| Board Approvals Sole 5 | lore |
| Board Approval Procur | rement Request |
| Board Asproval Dale: Approv | si Remest |
| 13. Click on the Contrac from the drop-down Contract Category: ⁴ Board Approvals | ct Category drop-down arrow, then select the desired contract category list. |
| Beard Approval | 84 |
| Board Approval Date: 01 | PO |
| and a share a star | |
| Contract performan Contract Performance Location Vendor Congressional District Oversight Approval Document Builder Doc Type Total Renewals Renewals Exercised | Ince location or Statewide from the drop-down list. |
| | |
| 15. Use the scroll bar | on the right side of the screen to scroll down the page. |
| 15. Use the scroll bar 16. Enter the appropria | on the right side of the screen to scroll down the page. ate values in the following required * fields: |
| 15. Use the scroll bar 16. Enter the appropria | on the right side of the screen to scroll down the page . |
| 15. Use the scroll bar 16. Enter the appropria State Fund %. * | I on the right side of the screen to scroll down the page. ate values in the following required * fields: |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: | I on the right side of the screen to scroll down the page. ate values in the following required * fields: |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: Other Amount %: * | I on the right side of the screen to scroll down the page. ate values in the following required * fields: 0.00 0.00 0.00 |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: Other Amount %: * Federal Amount | In the right side of the screen to scroll down the page. ate values in the following required * fields: 000 000 000 000 000 000 000 |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: Other Amount %: * Federal Amount State Amount * | In the right side of the screen to scroll down the page. ate values in the following required * fields: 000 000 000 000 000 000 000 000 |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: Other Amount %: * Federal Amount State Amount * | In the right side of the screen to scroll down the page. Intervalues in the following required * fields: |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: Other Amount %: * Federal Amount State Amount * Other Amount * | In the right side of the screen to scroll down the page. ate values in the following required * fields: 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: Other Amount %: * Federal Amount State Amount * Other Amount * Other Amount * | on the right side of the screen to scroll down the page. ate values in the following required * fields: |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: Other Amount %: * Federal Amount State Amount * Other Amount * Other Amount * IT. Click on the Check Example: | In the right side of the screen to scroll down the page. Intervalues in the following required * fields: Image: Imag |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: Other Amount %: * Federal Amount State Amount * Other Amount * Other Amount * Other Amount * Total Value: * | In the right side of the screen to scroll down the page. Intervalues in the following required * fields: Image: Imag |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: Other Amount %: * Federal Amount State Amount * Other Amount * Other Amount * Other Amount * I7. Click on the Check Example: Please enter Federal On | In the right side of the screen to scroll down the page. ate values in the following required * fields: 000 |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: Other Amount %: * Federal Amount * Other | In the right side of the screen to scroll down the page. ate values in the following required * fields: 000 |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: Other Amount %: * Federal Amount State Amount * Other A | In the right side of the screen to scroll down the page. ate values in the following required * fields: 000 000 000 000 000 000 000 000 The state of the screen to scroll down the page. ate values in the following required * fields: 000 |
| 15. Use the scroll bar 16. Enter the appropria State Fund %: * Federal Funds %: Other Amount %: * Federal Amount State Amount * Other Amount * Other Amount * Other Amount * Other Amount * T7. Click on the Check Example: Enter at least one Item Please enter Federal Ai Please enter Federal Ai Please enter CFDA Nur | In the right side of the screen to scroll down the page. ate values in the following required * fields: 000 000 000 000 000 000 The series of the screen to scroll down the page. ate values in the following required * fields: 000 |

| 18. Enter the Federal Grant Award number and Federal Aid number in the appropriate fields. |
|--|
| Fed Grant Award Number: 1234567898 |
| Fed Ald Number: * 123456789B |
| 19. Click the CFDA Number drop-down menu and select the appropriate CFDA number. |
| CFDA Number: * |
| Stimulus Funded: 14.253 |
| Federal Funds Indicator: 14.254 |
| 20. Enter the CFDA Number in the box to the right. |
| CFDA Number: * 12.401 * 12345 |
| 21. Click on the Check button to review any system messages concerning data requirements. |
| Example: |
| Enter at least one item |
| Please attach the necessary justification or contract that needs to be posted to transparency under the Notes and Attachment tab |
| 22. Click on the Items tab. |
| Overview Header Hende |
| |
| 23. Click on Add Item, then select the appropriate Item type. |
| Add Item . Elertical pluch Copy asta |
| t Normal |
| Add Items from SC |
| Punchout Catalog - CDWG |
| Punchout Catalog - Grainger |
| 14 Punchout Catalog - HD Supply Catalog |
| # Punchout Gatalog - Office Depot |
| Punchout Catalog - Staples, I hat was Easy V SOME MDM Catalog - Braßrad |
| BOWING MIDW Calability FFIEFTOD |
| 24. Click on the Product Category search icon. |
| Product Category Target Quantity |
| 0.000 |
| |
| 25. Enter a description of the product , then click on Start Search . |

| Search Product Categ | Search Product Category | | |
|--------------------------------|--|---|---|
| | | | |
| | | | |
| Display As | | Hierarchy | |
| | | | |
| Note: Placeholder sear | ch with * is possible. | Search ignores upper/lowercase spelling | |
| Product Category ID: | | | |
| Logical System: | | | |
| Restrict Number of | Value List Entries | 500 | |
| Start Search Reset | I | | |
| | | | |
| 26. Use the scro | oll bar to se | earch through the lis | t of items displayed, then select the desired |
| product. | | | |
| Item Detail 0 Lins | aved data will be | lost | |
| | | | Evidend All Collonia All |
| | | | Exhand Al Crimebias Al |
| Description | | Category ID | Logical System |
| Material G | Foup | R3MATCLASS | |
| | al Group Logi | R3MATCLASSREACLNT100 | |
| ★ Aco | ustical InsulMati | 01000 | |
| - 4 | Acoustical Tile | 01005 | TEACLNT100 |
| - 4 | Acoustical Til | 01008 | TEACLNT100 |
| - / | Acoustical Til | 01009 | TEACLNT100 |
| - / | Acoustical Ad | 01011 | TEACLNT100 |
| | | | |
| 27. After you hav | /e selected | the product, click Ok. | |
| | | | |
| OK Cancel | | | |
| | | | |
| 28. Enter the fol | lowing req | uired information ab | out the product: |
| Construction of the | | | |
| Description F | Product Category | Target Quantity Option S | tatus Unit Target Value Price |
| Accoustic Tile 0 | 1005 | 0.000 | EA 0.00 15.99 1 |
| | | | |
| Field | Descript | on | |
| | | | |
| Description | lext to de | escribe an object such | as a material or an activity such as required |
| | maintena | nce. | |
| Drico | | | |
| Ince | value ass | signed to material or s | ervice when transferring from one company to |
| | another. | The price of materials | sold is usually greater than the cost. The price of |
| | materials | purchased usually pr | ovides the basis for their cost in SAP. |
| | site and the second sec | | |
| Unit | Unit by w | | be measured. Some examples include pound, |
| | gram, me | ter, or liter. | |
| Target Value | Total value of all materials to be released against the contract | | |
| raiger value | | | |

| 29. Click on the Check button to review any system messages concerning data requirements. |
|---|
| Example: |
| 🛄 Please attach the necessary justification or contract that needs to be posted to transparency under the Notes and Attachment tab |
| Line 1. Enter either the target quantity or the target value for the item |
| 30. Click on the Header tab. |
| 31. Click on the Material/Service drop-down arrow, then select the desired service type from the drop-down list. |
| * Material/Service Type: N/A |
| Contract Performance Location: ACTORS ACTURES ACTURES |
| Oversight Approval: ACCOUNTANTS - MDIRECT COSTS ACCOUNTANTS - GAAP PREPARATION ACCOUNTANTS - CPA ACCOUNTANTS - CPA |
| Total Renewals: ACCOUNTANTS Renewals Exercised: ACCOUNTING TECHNICIAN |
| Buy On Behalf. ADMINISTRATIVE ASSISTANT ADVERTISING/PUBLICATIONS |
| 32. Click on the Items tab. |
| 33. Click on the Assign Distribution button. |
| Duplicate Delete Assign Distribution |
| 34. Click the search icon in the Release-Authorized Purchasing Organization field. |
| Assign Distribution |
| Add Line Delete Copy Paste Default h |
| |
| 35. Click on the desired line item on the Business Partner Number screen, then click on Ok. |
| Business Partner Number: All Values Show Filter Criteria Personal Value List Settings BusPartn., Name of Org. STATE OF MISSISSIPPI - PURCHASI OK Cancel |
| 36. On the Assign Distribution pop-up screen, enter the Target Value. This is the total value of all materials to be released against the contract. |

| | Assign Distribution | | | | | | | |
|-------|---|---|---|--|--|--|--|--|
| | Add Line Delete Copy Paste | Default Item Target Value | 8 | | | | | |
| | Release-Authorized Purchasing Organization Name Location Name Document Type in Target System Target Value | | | | | | | |
| | h . | | I FURCHASING 18 Contract = 100,000.00 | | | | | |
| | | | | | | | | |
| 37 (| 27 Click the Search 🗍 icon in the Doumant Terms field. The Terms of Doumant Kour All Values | | | | | | | |
| 57.0 | croon will display | in the raymen | it remisticit. The remistor ayment hey. All values | | | | | |
| | screen will display. | | | | | | | |
| | Target Value Payment Terms C | urrency | | | | | | |
| | 100 000 00 7000 | in children of the second s | | | | | | |
| | 100,000.00 2000 | 0 | | | | | | |
| | | | | | | | | |
| 38.0 | Click on Start Search. | | | | | | | |
| | Terms of payment key: All Values | | × | | | | | |
| | - Hide Filter Criteria Pe | rsonal Value List Settings | | | | | | |
| | | | | | | | | |
| | Own explanation: | \$ | | | | | | |
| | Terms of Payment 🛇 | P | | | | | | |
| | Logical System: 🛇 🔲 | 8 | | | | | | |
| | Restrict Number of Value List Entries To | 500 | | | | | | |
| | Result runber of value List Entries To | | | | | | | |
| | Start Search Reset | | | | | | | |
| | | OK Cancel | | | | | | |
| | | OR Cancer | | | | | | |
| 39. (| Click in the gray column t | to the left of the | e desired Terms of Payment, then click on Ok . | | | | | |
| | | | | | | | | |
| | Own explanation | Terms of Payment | Logical System | | | | | |
| | 1% discount 15 days else 30 days | 2115 | TEACLNTTUD | | | | | |
| | 2% discount 15 days else 30 days | 2215 | TEACLIVITUU | | | | | |
| | Net Due 10 day | 2001 | TEACLAITING | | | | | |
| | Net Due 10 days | 2010 | TEACLAITING | | | | | |
| | Net Due 30 days | 2030 | TEACLNTIO | | | | | |
| | Net Due 45 days | 2045 | TEACLNTIOD | | | | | |
| | Nei Due 5 days | 2005 | TEACLNTTOO | | | | | |
| | Pay immediately due net. | 2000 | TEACLINITION | | | | | |
| | Pay on 1 utn day of the month | 2210 | TEACLNTTOD | | | | | |
| | Pay on 1st day of the month | 22.01 | TEACENT 100 | | | | | |
| | | | OK Cancel | | | | | |
| | | | | | | | | |

| Overview Header Items |
|--|
| 42. Click on the Distribution sub-tab. |
| Header Items Notes and Attachments Indition Exchange Rate Thresholds Distribution |
| |
| 43. Enter the Target Value of all materials to be released against the contract in the Target Value field. |
| Target Value Payment Terms 100,000.00 |
| 44. Click on the Notes and Attachments tab. |
| Items Notes and Attachments |
| 45. Click on the Add Attachment button. |
| Attachments Add Attachment Edit Description Versioning |
| 46. When the Add Attachment window appears, click on the Browse button to locate the file. |
| Add Attachment |
| Here you can upload an attachment. You have to assign it to either the document general data or to an item File. |
| 47. Choose the file to attach, then click on Open. |
| Name Date modified Type Size |
| Emergency Justification J21/2014 5:53 PM Microsoft Word D. 13 KB MARKE LOG226 Course Every L22/2014 13 38 484 Microsoft Word D. 33 LKB |
| Image: Test Document 1/21/2014 152 PM Tolerwork Word D. 12 KB |
| |
| All Files (".") |
| Open Cancel |
| 48. Enter a description of the file that is being attached in the Description field. |
| File: C1cbetswort1Mississip Browse |
| Description. er Detailed Description |
| 49. Click in the box beside "Keep This Attachment Internal" to unselect the option. |
| Visible Internally only: Keep this attachment internal |
| 50. Click Ok . |
| 51. Click on the Check button to review any system messages concerning data requirements. |

| Example: | |
|--|--|
| There are no messages | |
| 52. Once there are no more system messages, click on the Release button. | |
| Close Save Check Print Preview | |
| 53. Click on the Close button. | |
| Contract 8200000405 released for approval | |
| | |
| Close Edit Copy Check | |

| Job Aid 1.2 – Create a Contract from an RFx | | | | | |
|---|--|--|--|--|--|
| Description: This Job Aid provides instructions on creating a contract from an RFx. | | | | | |
| Perform this procedure when an RFx has been published, accepted, and needs to be converted into a contract. | | | | | |
| Always review the system messages: | | | | | |
| Green Z – Data entered is correct and helpful information is given (Example: RFx number saved, contract number created, etc.) | | | | | |
| Yellow (Warning) 🙆 – Alerts you to a situation but is not a hard stop. Review the information, data may be kept or edited. | | | | | |
| Red (Alert) 🖲 – Alerts you to a problem or a hard stop. You must fix the error prior to proceeding. | | | | | |
| Steps | | | | | |
| 1. Start the transaction using the menu path: | | | | | |
| SRM > Procurement > Procurement Work Center | | | | | |
| 2. Click on the Producement Work Center Reports | | | | | |
| Progurement > Progurement Wark Cent | | | | | |
| 3. Click on Strategic Sourcing. | | | | | |
| 4. Click on the Publishing (xxx) option. | | | | | |
| RFxs All (48) Saved (29) Awaiting Approval (0) Published (171) Completed (0) Deleted (0) Release Rejected (0) | | | | | |
| 5. Click on Filter . | | | | | |
| 6. Enter the RFx number in the RFx Number field. | | | | | |
| 7. Press Enter. | | | | | |
| 8. Click on the Gray box beside the desired RFx for conversion. | | | | | |
| 9. Click on the Responses and Awards button. Responses and Awards | | | | | |
| 10. Click on the Response Comparison tab. | | | | | |
| 11. Click on Compare All Responses . | | | | | |

12. Click on **Response Activity**.

- 13. Enter the **Response Number** in the Response Number field.
- 14. Click on Create Contract.
- 15. Click on **Create Contract** to select the contract type.
- 16. Click on **Create Contract**. The system will display a message stating the Contract was not created completely. Make a note of your contract number for future reference.
- 17. Click on the **Close** button.
- 18. Click on the **Close** button to return to the main screen.

Job Aid 1.3 – Contracts with Distributor or Fulfillment Vendors 1. When creating a contract with Distributors or Fulfillment vendors, the Partner Grouping Schema must be identified at the point the Contract Type is selected. Select Contract Type Start Close Select the type of contract you want to create Partner Grouping Schema Contract Type Contract Type Description BRICKS - Constructio BRCT BRLE BRICKS - Lease CNTR Purchasing (General) EMEC Emergency Contract ZCTR DISTRIBUTOR CTR Distributor PGS SOLC Sole Source Contract ZCTR_FULFILLMENT CTR_Fulfilment_PGS SWCT Statewide Contract Enter External Number: 2. Distributors and Fulfillment vendors are added to the contract under the Header Partner functions. **v** Partner Details Add Send E-Mail Call Clear Funct Purch. Org. Auth. For Release Exclude Number Name · Suj Location Goods Recipient . Go Distributor · Résponsave companyee 10463 Robert Fulcher · Purch. Org. Auth. For Release SOMS 1 Location Distributor 3100000002 ALOHA LOCK & KEY SHOP 3. If the vendor on the contract can also fulfill the orders, the Prime Supplier Flag must be checked. Contract Name: 1130-14-C-SWCT-00174 Contract Owner: 10463 Robert Fulcher 99,999,999.00 USD Target Value/ Currency: D Release Value: 0.00 USD **Basic Contract:** Prime Supplier:

Job Aid 1.4 – Contracts with Price Lockdowns

1. If the contracted price cannot be changed (increased or decreased), the Buyer should select the **Contract Price Lock** flag when setting up the contract.

| Organization | | | | | | |
|-----------------------------|-----------------------------------|--|--|--|--|--|
| Purchasing Organization: * | State of Mississippi - Purchasing | | | | | |
| Purchasing Group: * | DFA OVSIGHT OPTFM | | | | | |
| FM Posting Date: * | 01/31/2014 | | | | | |
| Dates | | | | | | |
| Valid From / To: * | 01/31/2014 😰 - 01/30/2015 😰 | | | | | |
| Alert Expiration: | 45 Day(s) | | | | | |
| Contract price lock: | | | | | | |
| Partner Grouping Schema ID: | ZCTR_DISTRIBUTOR | | | | | |
| Selective Release Status: | Standard Processing | | | | | |



| Overview Hea | ter Items Notes and Attachments | | | | | | |
|--|---|--|--|--|--|--|--|
| General Header Data | | | | | | | |
| Contract Number: 8200000405 | | | | | | | |
| Supplier: * | 0 | | | | | | |
| 4. Click on the Items tab. | | | | | | | |
| Overview Hea | der Items Notes and Attachments | | | | | | |
| General Header Data | | | | | | | |
| Contract Number: | 820000405 | | | | | | |
| Supplier: * | 10 | | | | | | |
| 5. As required, complet | e or review the following fields: | | | | | | |
| Overview Header Item | IS Notes and Attachments Conditions Authorization Approval Tracking | | | | | | |
| Detaile Select Add Item & Every Line Number Item Category Opti Normal • Normal • | ne Option Copy Faste Duplicate Detetu Assign Distribution an Type Item Number Product D Description Product Category Target Quantity 39049766866 IRKEY, ROLL 39049 1000 LB 0.00 1.54 USD 39049766866 IRKEY, ROLL 39049 1000 LB 0.00 1.54 USD | | | | | | |
| Field | Description | | | | | | |
| Product ID | Example: 39049766866 | | | | | | |
| Description | Text to describe an object such as a material or an activity such as required maintenance. Example: TURKEY, ROLL | | | | | | |
| Product Category Code identifying an allocated group of materials with the same feature Example: 39049 | | | | | | | |
| Target Quantity Requested quantity for an item in a sales document. Example: 1000 | | | | | | | |
| Unit | Unit by which quantities are to be measured. Some examples include Pound, Gram, Meter, or Liter. | | | | | | |
| Price | Value assigned to material or service when transferring from one company to another. The price of materials sold is usually greater than the cost. The price of materials purchased usually provides the basis for their cost in SAP. Example: 1.54 | | | | | | |
| 6. Click on the Check Example: | button to review any system messages concerning data requirements. | | | | | | |

| | lion | formation | |
|--------------------|--|---|---|
| | tion | | Please enter Request type in Additional |
| | | on in Additional Information | Please enter Contract Performance Loc |
| | | | Please enter Contract Total Value |
| | he nosted to transparency under the Notes and Attachment tab | r contract that needs to be post | Please attach the heressaw justification |
| | to posed to manaparently under the ratics and relationent lau | contractinal needs to be pos | Trease anacit me necessary justinication |
| | | | |
| | | | |
| | ion Type. | ssign an Option | Click the line number to |
| | Copy Paste Duplicate Delete Assign Distribution | Exercise Option Copy | Details Select Add Item a |
| | n Number Product ID Description Product Category | Option Type Item Nur | Line Number Item Category |
| | 39049766866 TURKEY, ROLL 39048 | • 1 | 1 Normal |
| | 39049766866 TURKEY ROLL | * 3 | 5.2 Normal |
| | | | |
| | | n Type | Details Select / Add Item / Exercise Line Number Item Category Op 1 Normal 2 Normal Normal Opt Normal Opt |
| | Conditions Authorization | Notes and Attachments C on Copy Paste Duplicate | Click on the Details butto |
| | of the screen to scroll down the page . | the right side of t | Use the scroll bar 💽 or |
| | enter the beginning and ending dates. | ance field to ente | Click on Period of Perform |
| | Arcentance at Origin | | Reference Item Number: 0 |
| | Acceptance at Origin. | | Distribute Contract to Catalog No * |
| | Alert Release Value: 90 % | | Distribution: |
| | Minimum Order Quantity: 0 LB | | Block Local Sourcing: |
| D | Minimum Order Value. 0.00 USD | × | Reason Code: |
| | | | Period of Performance: * |
| r the dates | pop-up calendar and clicking the arrows or t | by using the pop | The dates can be selecte can be entered manuall Product Category:* Reference Item Number: Distribute Contract In Catelon |
| | | 12 13 14 19 20 21 | Distribution: 36 1 2 3 Distribution: 37 8 9 10 1 Block Local Sourcing: 38 15 16 17 1 |
| | | 12 13 14 19 20 21 26 27 28 | Distribution: 37 8 9 10 Block Local Sourcing: 38 15 16 17 Reason Code: 40 29 30 |
| | Conditions Authorization plicate Delete Assign Distribution of the screen to scroll down the page. enter the beginning and ending dates. Acceptance at Origin: Alert Release Value: 90 % Minimum Order Quantity: 0 LE Minimum Order Value: 0.00 Us | Notes and Attachments C on Copy Paste Duplicate the right side of t ance field to ente | Overview Header tems Items Items Exercise 0 Use the scroll bar Image: Contract to Catalog. Or Click on Period of Perform Distribute Contract to Catalog. No Image: Contract to Catalog. Distribute Contract to Catalog. No Image: Contract to Catalog. No Image: Contract to Catalog. Distribution: Image: Contract to Catalog. No Image: Contract to Catalog. Distribution: Image: Contract to Catalog. Image: Contract to Catalog. Reason Code: Image: Contract to Catalog. Image: Contract to Catalog. |

| 12. Enter the Exerci | se Period beginning and e | nd dates. | | |
|--|--|--------------------------|--------------------------------|----------------------|
| Period of Performance: | • 09/15/2014 😰 11/07/2014 🖸 | | | |
| Option Type: | Optional 💌 | | | |
| Option Status | Inactive | | | |
| Option Reference Item: | <u>a</u> . | | | |
| Exercise Period. | 08/15/2014 1 09/15/2014 | | | |
| The dates can b can be entered | e selected by using the pop manually. | -up calendar an | d clicking the arrows | s or the dates |
| 13. Click on the Op t | tion Reference Item searcl | h icon 🗖. | | |
| 14. Select the line r | number, then click on OK. | | | |
| Configurable Line Ilem Number: Al | I Values | | | |
| Show Filter Criteria | | | Personal Value List Settings | |
| Cont. Item No. | a ttem Number Product 1 39049766886 | TURKEY, ROLL | Category ID 39049 | |
| | | | | |
| | | | OK | |
| 15. Use the up arro | w scroll bar on the right sid | de of the screen | to scroll back u | p the page. |
| 16. Click on the Hea | ader tab. | | | |
| Overview | Ider Items Notes and Attachments | Conditions Authorizat | tion Approval Tracking | |
| 17. Click on Additic | onal Information. | | | |
| Overview Head | er Items Notes and Attachments Co | anditions Authorization | Approval Tracking | |
| Basic Data Condition | Exchange Rate Thresholds Distribution Noter | s and Attachments Output | Additional Information Payment | |
| 18. Click on the Red drop-down list. | quest Type drop-down arr | ow, then select t | he desired request t | :ype from the |
| Request Type: * | IN IN | | | |
| Contract Category: * Board Approvals | Exemption | | | |
| Board Approval | Procurement Request | | | |
| Board Approval Digit: | Approval Reusess | | | |
| 19. Click on the Cor from the drop-de | ntract Category drop-down | n arrow , then se | elect the desired con t | tract category |
| Contract Category * | | | | |
| Board Approvals | 05A | | | |
| Board Approval: | Cooperative | | | |
| Board Approval Date: | 090 | | | |

| Service Type: * | un 🐨 |
|---|--|
| P-Card | NIA + |
| Contract Performance Location * | ACTUARIES |
| Vendor Congressional District. | ACCOUNTANTS - INDIRECT COSTS |
| Oversight Approval. | ACCOUNTANTS - GAAP PREPARATION ACCOUNTANTS - CPA |
| Document Builder Doc Type | ACCOUNTANTS |
| Total Renewals | ACCOUNTING TECHNOLIAN |
| Menewals Caroland. | ADMINISTRATIVE ASSISTANT ADVERTISING/PUBLICATIONS |
| Contract Performance Loca Vendor Congressional Dist Oversight Approval Document Builder Doc Type Total Renewals. Renewals Exercised | act Performance Eocation drop-down arrow, then select the desired ance location or Statewide from the drop-down list. |
| | CALHOUN CARROLL CHICKASAW |
| 22. Use the scroll bar options . 23. Enter the appropr | on the right side of the screen to scroll down the page for additional ate values in the following required * fields: |
| 22. Use the scroll bar options. 23. Enter the appropr State Fund %: * | OCLIVEN CARROLL CHICKESSAW Image: Constant of the screen to scroll down the page for additional ate values in the following required * fields: |
| 22. Use the scroll bar options. 23. Enter the appropr State Fund %: * Federal Funds %: | In the right side of the screen to scroll down the page for additional ate values in the following required * fields: |
| 22. Use the scroll bar options. 23. Enter the appropr State Fund %. * Federal Funds %: Other Amount %. * | In the right side of the screen to scroll down the page for additional ate values in the following required * fields: |
| 22. Use the scroll bar options. 23. Enter the appropr State Fund %: * Federal Funds %: Other Amount %: * | In the right side of the screen to scroll down the page for additional ate values in the following required * fields: |
| 22. Use the scroll bar options. 23. Enter the appropr State Fund %: * Federal Funds %: Other Amount %: * | Outware california californi californi california california california california california |
| 22. Use the scroll bar options. 23. Enter the appropr State Fund %. * Federal Funds %: Other Amount %: * Federal Amount State Amount * | In the right side of the screen to scroll down the page for additional ate values in the following required * fields: |
| 22. Use the scroll bar options. 23. Enter the appropr State Fund %. * Federal Funds %. Other Amount %. * Federal Amount State Amount * Other Amount * | In the right side of the screen to scroll down the page for additional ate values in the following required * fields: |
| 22. Use the scroll bar options. 23. Enter the appropr State Fund %. Federal Funds %. Other Amount %. Federal Amount State Amount Other Amount Contract Total Value: * | CALHOUN CARROLL On the right side of the screen to scroll down the page for additional ate values in the following required * fields: |
| 22. Use the scroll bar options. 23. Enter the appropr State Fund %: Federal Funds %: Other Amount %. Federal Amount State Amount Other Amount Contract Total Value: | Image: California Ca |
| 22. Use the scroll bar options. 23. Enter the appropr State Fund %: Federal Funds %: Other Amount %. Federal Amount State Amount Other Amount * Other Amount * Contract Total Value: * 24. Use the scroll bar 25. Click on the Items | Image: California Ca |
| 22. Use the scroll bar options. 23. Enter the appropr State Fund %: Federal Funds %: Other Amount %: Federal Amount State Amount Other Amount Contract Total Value: 24. Use the scroll bar 25. Click on the Items | Image: Constant of the screen to scroll down the page for additional and the values in the following required * fields: Image: Constant of the screen to scroll up the page. tab. |

| De | scription | Product Category | Target Quantity | Option Status | Unit Ta | arget Value | Price Current | Price Per | |
|----------|------------------|--------------------|-----------------------|------------------------------|-----------|------------------|---------------|-------------|---------------|
| TUE | KEY ROLL | 36049 | 1,000 | Inactive | 18 | 0.00 | 1.54 USD | 1 | |
| 101 | INE I, HOLL | | 1,000 | macore | | 0.00 | 1.54 0.50 | 1 1 | |
| 27. Clic | k on the | Header ta | b. | | | | | | |
| Over | rlew Head | er items | | | | | | | |
| | | | | | | | | | |
| 28. Clic | k on Bas | sic Data. | | | | | | | |
| -2 | Overview | Header | tems | | | | | | |
| Ba | sic Data Cor | idition Exchange | Rate T | | | | | | |
| 29. Clic | k on Cal | culate Ta | rge Value. | | | | | | |
| Curre | ency, Values a | ind Pricing | | | | | | | |
| Curre | ency: * | USC | | | | _ | | | |
| Targe | t Value: | | 5,000.00 | USD Calculate | Target Va | iue | | | |
| 30. Clic | k on the | Notes and | d Attachme | e nts tab. | | | | | |
|) It | ams I | lotes and Attach | ments | | | | | | |
| | | intes and Attach | inons. | | | | | | |
| 31. Clic | k on the | Add Attac | chment but | on. | | | | | |
| ▼ Att | achments | | | | | | | | |
| Ad | d Attachment | Edit Description 📗 | /ersibning | | | | | | |
| 22 M/b | an tha A | | | | aliali | |). | | aata tha fila |
| 32. VVII | en the A | uu Allachn | | appears | , CIICK | | Srowse bi | | cate the me. |
| Add | Attachment | | | | | | | | |
| He | re you can uplo | ad an attachment | You have to assign it | to either the docu Browse | ment gene | ral data or to a | an item | | |
| | | | 1 | | | | | | |
| 33. Ent | er a des | cription of | f the file tha | at is being | attach | ned in th | ne Descrip | tion field. | |
| Add | Atlachment | | | | | | | | |
| He | ere you can uple | oad an attachmeni | . You have to assign | it to either the do | cument ge | neral data or | to an item | | |
| Fil | e: | | | Brows | B | | | | |
| De | sign To: * | | General Data | _ | | | | | |
| Vis | sible Internally | only | Keep this atta | chment internal | | | | | |
| | | | | | | | | | |
| 34. Clic | k in the | box besid | le "Keep Tl | nis Attach | nment | Interna | al" to unse | lect the op | otion. |
| Visit | le Internally o | nly: | Keep this a | tachment intern | at | | | | |
| 25 01- | k the Ol | button | | | | | | | |
| 35. CIIC | | bullon. | | | | | | | |
| OF | Cancel | | | | | | | | |
| | | | | | | | | | |

| 36. Click on the Check button to review any system messages concerning data requirements. |
|--|
| Example: |
| There are no messages |
| 37. Once there are no more system messages, click on the Release button. |
| Close Save Check Print Preview |
| 38. Click on the Close button. |
| Contract 8200000405 released for approval |
| Close Folease Edit Copy Check |

Job Aid 1.6 – Create an Emergency Contract

Description: This Job Aid provides instructions on creating an emergency contract. This procedure should be performed when an emergency has arisen, and a contract is needed to acquire goods or services immediately.

| | | Ste | ps | | | | | | |
|----|--|---|--|----------------------------------|--|--|--|--|--|
| 1. | Start the transaction using the menu path: | | | | | | | | |
| | SRM > Procurement > Procurement Work Center > Contract | | | | | | | | |
| | Modelsappi Accountablely System for Government information a | and Collaboration | | | | | | | |
| | e Hind Hump Faultin Vea Hep | | | | | | | | |
| | Home Ensures Self-Service Ball Service Esperande Ball Service +-O-tria General Assistante Analytics and Westgenisht | | | | | | | | |
| | West Center Descriver | ail 🐣 | Workload Redistribution | | | | | | |
| | Procurement Work Center is your central p transactions. Additionally. It contains links to be Requisitioning | Lace for accessing the Procurement applied utilities and personalization features | Workhad Redistribution Contract Management | | | | | | |
| | Edway Reviewer Parchasing Shopping Cart Shopping Cart Terrolate | | Contract Download Report | | | | | | |
| | Residues Partner Central Functions Westward Resistantional Westward Resistantional | 9 | Strategic Sourcing Create Documents | | | | | | |
| | Contract Management Survey Man | | REX Bid Tabulation Report Revense Auction Report | | | | | | |
| | Custionaire | | Line address Longer | | | | | | |
| 2. | Select the desired contract t | ype (Emergency C | Contract) by clie | cking on the line, then click on | | | | | |
| | Continue. | | | | | | | | |
| | Select the type of contract you want to create | | | | | | | | |
| | Contract Type Contract Type Description | Partner Grouping Schema | 1 | | | | | | |
| | CNTR Purchasing (General) | | | | | | | | |
| | EMEC Emergency Contract | Concernance of the second s | + | | | | | | |
| | EPLC EPL Planned | ZCTR_DISTRIBUTOR CTR_D | istributor_PGS + | | | | | | |
| | LSAG Legal Svcs (AG) | | - | | | | | | |
| | SOLC Sole Source Contract | | | | | | | | |
| | SWCT Statewide Contract | ZCTR_DISTRIBUTOR CTR_D | istributor_PGS - | | | | | | |
| 3. | Enter the Supplier Number in Overview Header Items General Header Data Contract Number. B200000405 Supplier.* | n the Supplier field. | | | | | | | |
| | | | | | | | | | |
| 4. | Click on the Items tab. | | | | | | | | |
| | Overview Header Items | | | | | | | | |
| 5. | As required, complete or revie | ew the following fiel | ds: | | | | | | |

| Overview Header | Wems Notes and Attachments Conditions Authorization Approval Tracking | | |
|---|---|--|--|
| Torina | | | |
| Line Number Item Category | Option Type Item Number ProductID Description Product Category Target Quantity Option Status Unit Target Value Price Currency | | |
| Normal * | 390497668866 /PKEY, ROLL 39049 1000 LB 0.00 1.54 USD | | |
| Normal - | 39049766886 /RKEY, ROLL 39049 1000 LB 0.00 1.54 USD | | |
| Field | Description | | |
| Product ID | Example: 39049766866 | | |
| Description | Text to describe an object such as a material or an activity such as required maintenance. Example: TURKEY, GROUND | | |
| Product Category | Code identifying an allocated group of materials with the same features. Example: 39049 | | |
| Target Quantity | Requested quantity for an item in a sales document. | | |
| Unit | Unit by which quantities are to be measured. Some examples include Pound, Gram, Meter, or Liter. | | |
| Target Value | Total value of all materials to be released against the contract. Example: 15000 | | |
| Price Value assigned to material or service when transferring from one another. The price of materials sold is usually greater than the c of materials purchased usually provides the basis for their cost i Example: 1.54 | | | |
| 6. Click on the Head | er tab. | | |
| 7. Click on the Addit | tional Information tab. | | |
| Overview Header | Items Notes and Attachments Conditions Authorization Approval Tracking | | |
| 8. Click on the Requ | est Type drop-down arrow, then select the desired request type from the | | |
| arop-aown list. | | | |
| Request Type * | A | | |
| Board Approvale | empion . | | |
| Board Approval Pr | osurement Request | | |
| Board Asproval Dale: Ap | proval Remarks | | |
| 9. Click on the Cont from the drop-dow | ract Category drop-down arrow, then select the desired contract category /n list. | | |

| Contract Category: ** | NOA. | |
|--|---|---------------------|
| Board Annewal | 08A | |
| Board Approval Date | 0P0 | |
| | | |
| Click on the Servi drop-down list | vice Type drop-down arrow, then select the desired service ty | ype from the |
| drop-down list. | | |
| Senice Type: * | NA IN | |
| P-Card Contract Performance Location | ACTORS | |
| Vendor Congressional District. | ACTUARIES ACCOUNTANTS-INDIRECT COSTS | |
| Oversight Approval. | ACCOUNTANTS - GAAP PREPARATION ACCOUNTANTS - CPA | |
| Document Builder Doc Type: | ACCOUNTANTS | |
| Renewals Exercised | ACCOUNTIND TECHNOCIAN ADMINISTRATINE ASSISTANT | |
| | ADVERTISING/PUBLICATIONS | |
| | | |
| Oversight Approval Document Builder Doc Type Total Renewals Renewals Exercised 2. Use the scroll bar options. | ADAMS ALCORN AMTE ATTALA BENTON BOLIVAR CALHOUN CARROLL CHICKERAW | or additional |
| 3. Enter the approp | priate values in the following required * fields: | |
| State Fund % | 0.00 | |
| Otato i dila 30. | 0.00 | |
| Federal Funds %: | 0.00 | |
| Federal Funds %: Other Amount %: * | 0.00 | |
| Federal Funds %: Other Amount %: * Federal Amount | 0.00 | |
| Federal Funds %: Other Amount %: * Federal Amount State Amount * | 0.00 | |
| Federal Funds %: Other Amount %: * Federal Amount State Amount * Other Amount * | 0.00 0.00 0.00 0.00 | |
| Federal Funds %: Other Amount %: * Federal Amount State Amount * Other Amount * | 0.00 0.00 0.00 0.00 0.00 0.00 | |
| Federal Funds %: Other Amount %: * Federal Amount State Amount * Other Amount * Contract Total Value: * | 0.00 0.00 0.00 0.00 0.00 0.00 | |
| Federal Funds %: Other Amount %: * Federal Amount State Amount * Other Amount * Contract Total Value: * | | |

| Overview Header Basic Data Condition Exch |
|--|
| 16. Click on the Calculate Target Value button. |
| Currency, Values and Pricing |
| Currency: " USD |
| Target Value: 15,000.00 USE Calculate Target Value |
| 17. Click on the Notes and Attachments tab. |
| Items Notes and Attachments |
| 18. Click on the Add Attachment button. |
| ▼ Attachments |
| Add Attachment Edit Description Versioning |
| 19. When the Add Attachment window appears, click on the Browse button to locate the file. |
| Add Attachment |
| Here you can upload an attachment. You have to assign it to either the document general data or to an item |
| File. Browse |
| 20. Choose the file to attach , then click on Open . |
| Name Date modified Type Size |
| Emergency Justification U21/2014 3:53 PM Microsoft Word D. 13 KB MAGIC LOG228 Contracts Course Every U22/2018 12:39 814 Microsoft Word D. 331 KB |
| Test Document 1/21/2014 #52/PM Mernsoft Word D. 17/KB |
| All Files (".") |
| Open Cancel |
| 21. Enter a description of the file that is being attached in the Description field. |
| File: C:tcbetsworl1Mississip Browse |
| Description er Detailed Description |
| 22. Click in the box beside "Keep This Attachment Internal" to unselect the option. |
| Visible Internally only: Keep this attachment internal |
| 23. Click Ok . |
| 24. Click on the Check [] button to review any system messages concerning data requirements. |
| Example: |
| ALL "EMEC" Contracts will be subject to emergency post audit processing |

| 25. | . Click on the Release button. | |
|-----|---|--|
| | Close Release Save Check Print Preview | |
| 26. | . Click on the Close button. | |
| | ALL "EMEC" Contracts will be subject to emergency post audit processing | |
| | Contract 8400000051 released for approval | |
| | Close Release Edit Copy Check Refresh Send E-Mail | |

Job Aid 1.7 – Create a Contract with Reference to a Shopping Cart

Description: This Job Aid provides instructions on creating a contract with reference to a shopping cart.

| | Steps |
|----|--|
| 1. | Start the transaction using the menu path: SRM > Procurement > Procurement Work Center > Purchasing > Carry Out Sourcing |
| | Home Procurement General Applications Analytics Overview Procurement Work Center Reports SRM Administration Procurement > Frocurement Vork Center Purchasing Active Queries |
| | Use the scroll bar in the left column to view more options. Select Carry Out Sourcing. |
| 2. | Enter the Requisition Number in the Number of Requisition field. |
| | Number of Requisition: |
| 3. | Click on the Search button. |
| 4. | Click the down arrow icon to minimize the search criteria. |

| 5. | Click on the appropriate shopping cart line , then click on the Next button. |
|----|---|
| | Requisition / Item Number Document Number Draft Type Item Number Configurable Item Number Description Varia |
| | |
| | |
| 6. | Click on the Create Draft button to view the drop-down of options, then select Contract. |
| | Create Draft_ |
| | Contract |
| | Auction |
| 7. | Click on the Transaction Type drop-down to view the list of types, then select the appropriate |
| | Transaction Type. |
| | Transaction Type |
| | ONTR : Purchasing (General) EMEC : Emergency Contract |
| | EPLC : EPL Planned |
| | SWCT_Statewide Contract |
| 8. | Click on the Edit Selected Drafts button. |
| | Edit Selected Drafts System Info Create Memory Snapshot |
| 9. | Click on the Supplier search icon. The Supplier: All Values pop-up window will display. |
| | Supplier: * |
| 10 | . Enter the Name of the Supplier in the Name1/last name field. |
| | Search term 2: |
| | Name 1/last name. |
| 11 | . Click on the Start Search button at the bottom of the pop-up window. |
| | Start Search Reset |
| 12 | . Use the scroll bar to scroll down or the right side to see the results, then click on the appropriate line to select the supplier. |
| 13 | . Once you have highlighted the supplier, click on the Ok button. |
| | OK Cancel |

| 14. Click on the Items tab. |
|---|
| Overview Header Items |
| 15. Enter the Target Value in the appropriate line under the Target Value Heading. |
| Unit Target Value EA. 5000 |
| 16. Click on the Header tab. |
| Overview Header Items Notes and Attachments Conditions Authonization Approval Tracking |
| 17. Click on Additional Information. |
| Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking Basic Data Condition Exchange Rate Thresholds Distribution Notes and Attachments Output Additional Information Payment |
| 18. Click on the Request Type drop-down arrow, then select the appropriate request type from the drop-down list. |
| Request Pype * Path Contract Cutupby, * Path Board Approvale Beamption: Bole Source Board Approval Procurement Request Board Approval Date: Approval Request |
| 19. Click on the Contract Category drop-down arrow, then select the appropriate contract category from the drop-down list. |
| Contract Category * |
| Board Approvate OSA |
| Board Approval. Cooperative |
| Board Approval Date: 0P0 |
| 20. Click on the Material/Service Type drop-down arrow icon. |
| 21. Click on the Contract Performance Location drop-down arrow, then select the appropriate contract performance location or Statewide from the drop-down list. |
| Contract Performance Location * |
| Vendor Congressional District STATEWIDE |
| Oversight Approval ADAMS |
| Document Builder Doc Type: ALCORN |
| Total Renewals. AMITE |
| Renewals Exercised: BENTON BOLIVAR CALHOUN |
| CHICKASAW. |

| 22. Use the scroll bar on the options. | ne right side of the screen to scroll down the page for additional |
|---|---|
| 23. Enter the appropriate value | ies in the following required * fields: |
| State Fund %: * | 0.00 |
| Federal Funds %: | 0.00 |
| Other Amount %: * | 0.00 |
| Federal Amount | 0.00 |
| State Amount. * | 0.00 |
| Other Amount: * | 0.00 |
| Contract Total Value: * | 0.00 |
| 24. Use the scroll bar 📥 on th | ne right side of the screen to scroll up the page . |
| 25. Click on Basic Data. | |
| Annual Instant Instant | |
| Basic Data Condition Exchange Rate T | |
| 26. Click on Calculate Targe V | /alue. |
| Currency, Values and Pricing | |
| Currency: * USD | |
| Target Value: | 5,000.00 USD Calculate Target Value |
| 27. Click on the Notes and Att | achments tab. |
| Items Notes and Attachments | |
| 28. Click on the Add Attachme | ent button. |
| ★Attachments | |
| Add Attachment Edit Description Version | 12 - |
| 29. When the Add Attachment | window appears, click on the Browse button to locate the file. |
| Add Attachment | |
| Here you can upload an attachment. You have | e to assign it to either the document general data or to an item |
| File. | Browse |
| 30. Enter a description of the | file that is being attached in the Description field. |

| Add Atlachment | | | |
|--|---|--------------------------------------|--------|
| Here you can upload an attachm File: Description: Assign To: * Visible Internally only | ent. You have to assign it to either the document general Browse Browse General Data Keep this attachment internal | il data or to an Item | |
| 31. Click in the box bes | ide Keep This Attachment Inte | ernal to unselect the option. | |
| Visible Internally only. | Keep this attachment internal | | |
| 32. Click the Ok button. | | | |
| 33. Click on the Check Example: | Check button to review any syste | em messages concerning data requiren | nents. |
| 34. Click on the Release | button. | | |
| Close Release Save Che | k Print Preview | | |
| 35. Click on the Close b | utton. | | |
| Close Rolease Edit | for approval | | |

Unit 2 – Modify a Contract

Job Aid 2.1 – Amend a Contract Description: This Job Aid provides instructions on amending a contract. Steps 1. Start the transaction using the menu path: SRM > Procurement > Procurement Work Center > Contract Management Work Center Duenues - State of Mississippi - MAUIC Portal - Windows Internet Fac Missesippi Accountability System for Government Inform 521 Use E 12 13 1 Procurement General Applications Anabites Hame Procurament Work Center Reports SRM Administration SUS Administration - Center - Work Center Overview Fut Screen Procurement Work Center Detail Workload Redistribution The Procurement Work Center is your central place for accessing the Procurement transactions. Additionally, it contains links to helpful utilities and personalization features Worktoad Redistribution Requisitioning **Contract Management** Create Documents Shocking Gar Shocking Carl Template Create Documents Contract Central Functions Rejected Shopping Calts Strategic Sourcing **Create Documents** RFx Bid Tabulation Report Survey Management Create Documents Survey Survey Package Workflow Workflow is a tool to help automate complex business processes where more than one user is involved Central Functions Universal Workind The Universal Workind is a tool that allows you to manage tasks from multiple sources You can manage your tasks, receive aiorts and handle notifications. Who Rates Wihom Change Guestocheire Utilities **Survey Reviewer** All utility functions can be found here for Procurement. Advanced Search Search for existing shopping carts and other documents Purchasing View Asset Validation Table Display all the current asset validations available Create Documents Prochaine On – Shocoine Cart 2. Click on the Show Quick Criteria Maintenance toggle or use the scroll bar to scroll down to view the results.

- Hide Quick Criteria Maintenance

3. Enter the Contract Number in the Number field.

| 0. | Central Contracts - All |
|----|---|
| | - Hide Quick Criteria Maintenance |
| | Number: |
| 4. | Use the scroll bar 🔄 on the right side of the screen to scroll down the page . |
| 5. | Click on the Apply button. |

| | Distribution: All |
|-----|---|
| | Smart Number: |
| | Apply] Clear |
| | View [Standard View] |
| 6. | To select the desired contract, click on the gray box in the first column of the line. |
| | E Central Contract Number Central Contract Name Status |
| | 8400000051 1130-14-C-EMEC-00009 Released |
| 7. | Click on the Edit button. |
| | Create Central Contract & Copy Display Edit |
| 8. | Click on the Header tab. |
| | Overview Header Items |
| 9. | Click on the Reason Code drop-down menu. |
| | Réason Code * |
| | Distribute Contract to Catalog: Internal Modification |
| | Organization External Modification Purchasing Organization: Oversight (Emergency/Catastrophic) |
| 10. | Select the appropriate Reason Code from the drop-down list. |
| 11. | Click on the Additional Information tab. |
| | Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking Basic Data Condition Exchange Rate Thresholds Distribution Notes and Attachments Output Additional Information Payment |
| 12. | Click on the Modification Type drop-down menu. |
| | Modification Type: |
| | Modification Description: * |
| | Board Approvals ADD/DELETE ATTACHMENT |
| 13. | Select the appropriate Modification Type from the drop-down list. |
| 14. | Enter a description for the contract modification in the Modification Description field. |
| | Modification Type: * ADD/DELETE ATTACHME/ * |
| | Modification Description: Ustification for Emergency Food Order |
| 15. | Click on the Notes and Attachments tab. |

| Items Notes and Attachments |
|---|
| 16. Click on the Add Attachment button. |
| Add Attachment Edit Description Versioning |
| 17. When the Add Attachment window appears, click on the Browse button to locate the file. Add Attachment Here you can upload an attachment. You have to assign it to either the document general data or to an item File. Browse |
| 18. Choose the file to Attach , then click on Open . |
| Name Date modified Type Size Image: State |
| All Files (*.*) Open Cancel |
| 19. Enter a description of the file that is being attached in the Description field. |
| Description. er Detailed Description |
| 20. Click Ok . |
| 21. Click on the Check button to review any system messages concerning data requirements. Example: |
| 22 Click on the Release button |
| Close Save Check Print Preview |
| 23. Click on the Close button. |
| ALL "EMEC" Contracts will be subject to emergency post audit processing Contract 8400000051 released for approval |
| Close Edit Copy Check Refresh Send E-Mail |

| Job Aid 2.2 – Terminate a Contract |
|--|
| Description: This Job Aid provides instructions on how to terminate a contract. |
| Steps |
| 1. Start the transaction using the menu path: |
| SRM > Procurement > Procurement Work Center > Contract Management |
| Back History View Hett Vieworket Supervised Information and Collaboration |
| Home Procurament Conversion SPIN Administration SUS Administration |
| Fut Screen |
| The Procurement Work Center is your central pace for accessing the Procurement transactions. Additionally, it contains links to helpful utilities and personalization features. Requisitioning Contract Management |
| Create Documents Create Documents Contract Contr |
| Revealed Shoreday Catta Create Documents ED Survey Management ED Ref Tabulator Report |
| Create Documents Durate Surray Facilities Outed formaties Outed formaties Outed formaties |
| Central Fauctions Untersail 2016tal 2/the Place When Standard Substantian Substantian Substantian Andre notifications. |
| Survey Reviewer Utilities At Utility functions can be found here for Procurement |
| Purchasing Search for eventing shopping carts and other documents. View Asset Valiantion Table Create Documents Display all the current asset validations available. |
| Electronic Carl Shocking Carl Devenue Dell'Towners |
| 2. Enter the Contract Number in the Number field. |
| Central Contracts - All |
| |
| Number: |
| 3. Use the scroll bar on the right side of the screen to scroll down the page . |
| 4. Click on the Apply button. |
| Distribution: All |
| Smart Number. |
| Apply Clear |
| View: [Standard View] |
| 5. Click on the Contract number to open the contract. |

| 6. | Click on the Header tab. |
|-----|---|
| | Overview Header ttems |
| 7. | Click on the Edit button. |
| | Close Release Edit Copy |
| 8. | Click on the Reason Code drop-down menu, then select External Modification as the Reason Code. |
| | Reason Code: * Distribute Contract to Catalog Internal Modification Organization External Modification Purchasing Organization: * Oversight (Emergency/Catastrophic) |
| 9. | Click on the Additional Information tab. |
| | Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking Basic Data Condition Exchange Rate Thresholds Distribution Notes and Attachments Output Additional Information Payment |
| 10. | Click on the Modification Type drop-down menu, then select Termination as the Type. Modification Description: * AMENDED ADD/DELETE ATTACHMENT |
| 11. | Enter a description for the contract modification in the Modification Description field. Note: The description entered in this field will display in Transparency. |
| | Modification Type: * TERMINATION Modification Description: * SUPPLIER UNABLE TO FULFILL CONTRACT |
| 12. | . Click on the User-Specified Status tab. |
| | User-Specified Status |
| 13. | Select Termination Complete as the Termination value. The date will default to the current date; however, the date can be changed if needed. |
| | User-Specified Status Status Type Status Date Closeout 10/03/2014 Termination Termination Complete 10/03/2014 |
| 14. | Click on the Release button. The contract must be in a released status for it to be closed. |

| 15. Click on the Edit button. |
|--|
| Close Release Edit Copy |
| 16. Click on the Inactivate Contract button. |
| Inactivate Contract |
| 17. The Confirmation pop-up screen will display. Click on Yes to confirm. |
| Confirmation Popup Do you really want to close the contract? |
| 18. The Contract Status will display Completed. |
| Display Document: 8200013437 Smart Number Y1012780P001 Contract Type BRICKS Construction Status Completed Contract 8200013437 completed Entract 8200013437 completed Entract 8200013437 completed Entract 8200013437 completed |

Unit 3 – Contract Review and Approval

Contract Workflow

- Workflow is triggered when the Release button is selected.
- The approval path is shown under the Approval tab.
- An Ad-hoc Approver can be added prior to submitting the document for approval.
- Once all approvals have been secured, the contract status will display "Released".
- The number of approvals is based on factors such as contract type, target amount, and product category.

| Approval Types | |
|----------------------|---|
| Term | Definition |
| | • The Agency Buyer Manager Approval is the first in the sequence of approval steps. |
| Agency Buyer Manager | Various Approvals apply depending upon approval threshold and the contract amount. |
| | If the Buyer Manager creates the contract, this level of approval does not apply. |
| | Offline approvals are approvals obtained outside of MAGIC through emails or signature on legal contract documents. These approvals are not electronically routed through the system. |
| | Offline approvals are usually wet signatures obtained from an agency board or oversight board. |
| Board (Offline) | Agencies can obtain Offline or Board Approval, then update the Agency/Board Approval field on the Contract Header>Additional Information tab to record the approval decision (approve or reject), along with the date the approval was obtained. |
| | Agency/Board Approvals are manually set to 'Approved' with the Approval Date. |

| | Overview Header Items Notes ar |
|-----------|---|
| | Basic Data Condition Exchange Rate Thresholds |
| | Additional Information |
| | General Contract Attributes Reference Contract Number: |
| | Request Type: * N/A Contract Category: * N/A |
| | Board Approvals Board Approval: Board Approval Date: |
| | • Oversight approvers include OPSCR, OPTFM, ITS, SPB, and AG. |
| Oversight | In some cases, there could be multiple levels of approval. Legal contracts may require approval from both the AG's Office and the State Personnel Board's Legal Division. |
| | If additional approval is needed besides Oversight Approval, manually add an Ad-Hoc Approver. |

Contract Statuses

Fields under the Approval tab include Current Status, Current Process Step, Currently Process By, Approval Process Date, Follow Up, and Header Approval Note.

| Carnetl Process Silps | S20 Certari America | | President and | | | | | |
|------------------------|--|------------|---|--|--|-------|-----------|---------|
| ATMENT PROCESSING | | | | | | | | |
| irest Decarat & | | | | | | | | |
| and any Property lines | Name of Street, State of Street, Stree | ABOLTS/ALL | | | | | | |
| des in | Chief has in Descade of Person | | | | | | | |
| - | There is about a case | - | | | | | | |
| 1000 | | | | | | | | |
| | | | | | | | | |
| Buater Assessed | inter a | | | | | | | |
| Header Approval | Interes Argement | | | | | | | L-B |
| Reader Approval | Restant Learnin Aggroup | | | | | - | . Comment | Set |

| Contract Status | Definition |
|---------------------------|--|
| In Process | Buyer is creating the contract. |
| Recall | Creator of the contract is making edits prior to contract approval. |
| Revision | Contract has been rejected and the creator is revising the contract. |
| Open | The contract has been released for approval, but the approver has not decided yet. |
| Rejected | The approver has rejected the contract. |
| Approved | Approver has approved the contract. |
| Automatic System Approval | No approver required. The contract was approved by the system. |

| Jo | ob Aid 3.1 – Review, Edit, Approve, or Reject a Contract |
|-----------------|--|
| De ар | scription: This Job Aid provides instructions on using the Universal Worklist to review, edit, prove, or reject a contract. |
| | Steps |
| 1. | Start the transaction using the menu path: SRM > Procurement > Universal Worklist |
| | Mississpi Accountability System for Government Information and Collaboration Fedary View Fede Forcement Forcement Concret Applications Locatily Management Concret View Fede Forcement Concret Applications Locatily Management Concret View Fede For Scorement Concret Applications Locatily Management Concret Applications Locatily Management Concret View Fede Concret Applications Locatily Management Concret View Fede Concret Applications Location Concret View Fede Concret Applications Locatily Management Concret View Fede Concret View Fede Concret View Fede Concret Applications Location Concret View Fede Concret Vie |
| 2. | Click on Universal Worklist (UWL). |
| | Vertice Nearseles Vertice Nearseles < |
| 3. | Click on the Refresh icon to refresh the list of items in the UWL. |
| 4. | Click on the contract that you want to review. |
| | Alerts Tasks (247 / 247) Notifications Show: All Image: Show: |
| 5. | On this screen you can either Approve, Reject, or Edit the contract by clicking the appropriate button. |
| | To approve the contract, click on the Approve button. |

| | Approve Reject Close Release Save Edit Check Inquire Print Preview System Information Create Memory Snap |
|----|--|
| 6. | If you need to reject the contract, first click on the Edit button to add a Note/Reason for the rejection. The Edit option allows you to open the contract and make edits before approving or rejecting the contract. |
| | To add the note, click on the Approval Tab and enter the reason for rejection in the Header Approval note. After adding the note, click on the Rejection button . |
| 7. | When you have finished with the contract, click on the Refresh button. |
| 8. | Click on the X in the top right of the screen to exit the transaction. The status of the contract will display Released. |

Unit 4 – Contract Reports

Job Aid 4.1 – Download a Contract

Description: This Job Aid provides instructions on how to download a contract. This report can be run with a variety of parameters such as:

- Released Transactions
- Remaining Amounts
- Distributors
- Line Information

Steps

- 1. Start the transaction using the menu path:
 - SRM > Procurement > Procurement Work Center > Contract Management > Contract Download Report



2. The Contract Summary Report screen will be displayed. Select **Display ALV** for the Output Selection.

| | to | - |
|----------|-----------|--|
| | to | |
| | to | |
| Released | | |
| | to | |
| | to | |
| | to | |
| | Re Teased | to t |

3. Enter the relevant parameters such as **Agency**, **Contract Type**, **Contract Status**, **Validity Dates**, etc. Once all desired parameters are entered, click the **Execute** button.

| lenu 🖌 | Save as Variant | Back Exit Cancel S | System . Execute Bet Variant |
|--------------------|-----------------|--------------------|------------------------------|
| Contract Selection | | | |
| Agency | 1000 | ×D | \$ |
| Contract Number | | to | \$ |
| Contract Type | ONTR | to | \$ |
| Contract Status | Released | - | |
| Vendor Number | | to | \$ |
| Creation Date | | to | \$ |
| Validity Date | 07/01/2014 | to | |
| Output Selections | | | |

4. Once the report has been executed, the results will be displayed. Using the **bottom scroll bar**, you can move the report to see the contract header fields.

| Men | 2 a | | 1 | Back Exit | Cancel Syste | m A Refre | sh Totals Print | Preview of \ | View Change | Layout Select | Layout Save | Layout | |
|-----|------------|------------|---------------|-------------|-----------------|------------|-----------------|--------------|-------------|---------------|-------------|-----------------------|---|
| Co | ntract He | ader items | | | | | | | | | | | |
| 0 | | | | | | | 1 | | | | | | |
| 6 | yDesc | Ctr ID. | Ctr. Desc. | Legacy Ctr | Created Ar | Pstng Dat | Pur. Group | Valid From | Valid To | Toal Amt | Rel. Amt | Open Amt Vendor No. | |
| 7 | hasing (Ge | 8200001667 | 1130-14-C-CNT | 1720140265 | 06/28/2014 10: | 06/28/2014 | 1130 GEN PUR | 06/28/2014 | 10/31/2014 | 2,912.50 | 0.00 | 2,912.50 3100020098 | |
| | hasing (Ge | 8200001677 | 1130-14-C-CNT | 1720140279 | 06/28/2014 10: | 06/28/2014 | 1130 GEN PUR | 08/28/2014 | 01/31/2015 | 6,874.33 | 0.00 | 5,874.33 3100004710 | |
| | hasing (Ge | 8200001678 | 1130-14-C-CNT | IT20140284 | 08/28/2014 10: | 06/28/2014 | 1130 GEN PUR | 06/28/2014 | 01/01/2015 | 902.00 | 0.00 | 902.00 3100027632 | |
| | hasing (Ge | 8200001688 | 1130-14-C-CNT | IT20140299 | 06/28/2014 10: | 08/28/2014 | 1130 GEN PUR | 08/28/2014 | 11/30/2014 | 3,206,00 | 0.00 | 3,206.00 3100020809 | |
| - | hasing (Ge | 8200001689 | 1130-14-C-CNT | (T20140324 | 06/28/2014 10: | 06/28/2014 | 1130 GEN PUR | 06/28/2014 | 12/31/2014 | 21,216.78 | 0.00 | 21,216.78 3100020098 | |
| 6 | hasing (Ge | 8200001890 | 1130-14-C-CNT | 1720140333 | 05/28/2014 10: | 06/28/2014 | 1130 GEN PUR | 08/28/2014 | 12/31/2014 | 755.28 | 0.00 | 755.28 3100017697 | |
| | hasing (Ge | 5200002043 | 1130-14-C-CNT | IT20140325 | 08/28/2014 11: | 06/28/2014 | 1130 GEN PUR | 08/28/2014 | 12/31/2014 | 2,682.50 | 0.00 | 2,662.50 3100003988 | |
| | hasing (Ge | 8200002052 | 1130-14-C-CNT | IT20140334 | 08/28/2014 11:4 | 06/28/2014 | 1130 GEN PUR | 08/28/2014 | 12/31/2014 | 2,000.00 | 0.00 | 2,000.00 3100020096 | |
| | hasing (Ge | 8200002053 | 1301-14-C-CNT | IT20140335 | 06/28/2014 11:4 | 06/28/2014 | 1301 GEN PUR | 08/28/2014 | 12/31/2014 | 3,647.00 | 0.00 | 3,647.00 3100021093 | |
| | hasing (Ge | 8200002137 | 1130-14-C-CNT | IT20140138 | 06/28/2014 11:4 | 06/28/2014 | 1130 GEN PUR | 06/28/2014 | 08/31/2014 | 39,979.76 | 0.00 | 39,979.76 3100000273 | 1 |
| | hasing (Ge | 8200002237 | 1130-14-C-CNT | C130-090289 | 06/28/2014 11:4 | 06/28/2014 | 1130 GEN PUR | 08/28/2014 | 12/31/2014 | 181,000.00 | 0.00 | 181,000.00 3100028666 | |
| | hasing (Ge | 8200002238 | 1130-14-C-CNT | C130-090290 | 06/28/2014 11: | 06/28/2014 | 1130 GEN PUR | 08/28/2014 | 12/31/2014 | 61,000.00 | 0.00 | 61,000.00 3100028666 | 1 |

5. To view relevant line information for the contract, click on the **hyperlink of the contract number** and the details will be displayed below.

| Assing (Ge <u>820000223</u> | 1130-14-C-CNT C130 | 090289 06/28/2014 11: | 06/28/2014 1130 GEN P | UR 08/28/2014 | 12/31/2014 | 181,000.00 | 0.00 181 | 000 00 310002 | 2000 |
|-----------------------------|--------------------|-----------------------|---------------------------|---------------|------------|----------------|----------|---------------|-----------|
| Assing (De E000022) | 1130-14-C-CNT C130 | 090290 06/28/2014 11 | 06/28/2014 1130 GEN P | UR 08/28/2014 | 12/31/2014 | 61,000.00 | \$.00 S1 | 000 00 310002 | 1000 V |
| | | 00. B. III | | | him | Territorial. | - | - | - |
| Hec Typ | Hem No. Item Typ | tem Desc. P | rod. Category Mat. Master | Suppl Parts | UOU AU | Price Per Unit | Proe | Target Qty | Target Vi |
| LINE | 2 | 2 | 0791 | | EA | 1 | 0.30 | 0.000 | 3,641 |
| LINE | 3 | 2 | 0495 | | EA | 1 | 0.00 | 0.000 | 3,641 |
| Banda | | | | | | | | | |

| | a. 🖽 🛛 🕅 | | Η | 1 |
|-----|--------------------|-------|----|----|
| Т | Spreadsheet | Da | Į. | P |
| 1 | Local File | 20 | 4 | 11 |
| 0E | Send Office | 201 | 4 | 11 |
| oe | ABC Analys. | 201 | 14 | 11 |
| OE | HTML download | 201 | 14 | 11 |
| 05/ | 28/2014 10-1 06/28 | 8/201 | 4 | 11 |

7. The following prompts will be shown, leave the default value of Excel and click the green checkbox.

| | Select Spreadsheet |
|----|--|
| | Formats: • Excel (in MHTML Format) • OpenOffice (in OpenDocument Format 2.0) • Select from All Available Formats • Always Use Selected Format |
| 8. | Click the Run button when the Java pop-up window displays. Do you want to run this application? Name: SAPGUI For HTML Applet Publisher: SAP AG Location: https://srm.magic.ms.gov This application will run with unrestricted access which may put your computer and personal information at risk. Run this application only if you trust the location and publisher above. Do not show this again for apps from the publisher and location above Image: More Information |
| 9. | Select the location to save your file (i.e. Desktop, My Documents, etc.) then click on the Save button. |

-

Save Cancel

exportXLS

Files of Type: XML file nm. (*.MHTML)

File Name:

| Jo | Job Aid 4.2 – Contract Management Report | | | | |
|----|---|--|--|--|--|
| De | Description: This Job Aid provides instructions on how to run a Contract Management Report. | | | | |
| | Steps | | | | |
| 1. | Start the transaction using the menu path: | | | | |
| | MAGIC Portal>Analytics | | | | |
| | C S Z[™] https://tog.magic.ms.gov/iij/portal/Navigation[™] P × B C × Z[™] Employee Overview - State × File Let trans Tavoutes Tools Halp S MAGIC Training & Support B ttp:-saphelp.magic.ms. Q: HP ALM - Quality Center 11 A Breaking News & | | | | |
| | Mississippi Accountability System for Government Informatic | | | | |
| | Home Procurement General Applications Analytics Overview Universal Worklist Identity Management | | | | |
| 2. | Click on the Applications button in the top right of the screen. | | | | |
| | Applications Preferences | | | | |
| 3. | Select Web Intelligence Application. Web Intelligence Application | | | | |
| 4. | Click on the folder icon. The Open a Document from Server pop-up screen will display. | | | | |
| | Home Documents Web Intelligence F = 0 | | | | |
| 5. | Click on the plus sign + beside the Public Folders icon. | | | | |
| | E S Home | | | | |
| | My Favorites | | | | |
| | E Public Folders | | | | |
| 6. | Click on the plus sign + beside the State of Mississippi folder. | | | | |
| | Folders Categories | | | | |
| | My Favorites | | | | |
| | Public Folders | | | | |
| | State of Mississippi | | | | |
| 7. | Click on the plus sign + beside the SRM-Supplier Relationship Management folder. | | | | |

Г



Job Aid 4.3 – Contract Information Added to the ME2K, ME2L, and ME2N Reports

Description: Four new fields that have been added to the ME2K, ME2L, and ME2N Reports.

| Field | Additional Information |
|---------------------------|-------------------------|
| ZSRM Contract Number | Contract number in SRM |
| ZSRM Contract Line Number | Line number in SRM |
| ZECC Contract Number | Contract number in ECC* |
| ZECC Contract Line Number | Line number in ECC* |

This Job Aid provides instructions on including the new fields to your report layout.

| | Steps |
|----|--|
| 1. | Select the Change Layout icon Purchasing Documents by Document Number (1 * * * * * * * * * * * * * * * * * * |
| 2. | Highlight the fields from the Column Set. |
| 3. | Click the left arrow to move the highlighted fields to the Displayed Columns area. |
| 4. | Click the green check mark 🗹. |
| 5. | When the report is executed, the fields will be displayed. Type To be Inv. Net price ZECC Contract ID ZECC Contract Item ZSRM Contract ID ZSRM Contract Item *ECC field information is only applicable if the contract has distributed to ECC. |

Unit 5 – Additional Job Aids (Helpful Tips)

Job Aid 5.1 – Search for Converted Contracts in MAGIC

Description: This Job Aid provides instructions on searching for converted contracts in MAGIC using the Advanced Search link.



2. Once the Advanced Search page is displayed, select **Contract** from the Search For drop-down box.

| | Advanced Search | | |
|----|----------------------------------|-----------|--------------------------------------|
| | Close | | |
| | Search For: Contract | 19 | |
| 3. | Enter the SAAS Contract | Number in | the Reference Contract Number field. |
| | Liste ful the Managements and an | I | |

Helpful tip: You may enter **only a few characters of the SAAS Contract Number** followed by * and the system will search for the few characters you entered.

| | Valid From Reference Contract Number. | |
|----|--|--|
| 4. | Click on the Search butt | on. will be displayed in the Search Results section |

Job Aid 5.2 – Setting Contract Alerts

Description: This Job Aid provides instructions on setting up Contract Alerts.

MAGIC has the capability to notify users by email and through the Universal Worklist (UWL), when a contract's validity date is about to expire. The system can also alert when the contract has met or exceeded a specified percentage against the contract, based on the "Released Value". When the alert is triggered, the system will send an email to all users within the Purchasing Group.

- Steps 1. Start the transaction using the menu path: SRM > Procurement > Procurement Work Center > Contract Management - MAGIC Portal - Wir MXXIII: Mississigni Accountability System for Govern ment information and Collaboration 21 Use 6 E rai Accelications Anabites SRM Administration BUS Administration P AT = Mark Certiler Drenter **Procurement Work Center Detail** Workload Redistribution The Procurement Work Center is your central place for accessing the Procurement transactions. Additionally, it contains links to helpful utilities and personalization features Workload Reductribution **Contract Management** Requisitioning Create Documents Shoowing Carl Create Documents Contract Shooping Carl Template **Central Functions** Strategic Sourcing Rejected Shopping Calts Create Documents Survey Management **Bid Tabulation Report** Create Documents Workflow Workflow is a tool to help automate complex business processes where more than one user is iswohred. Survey Package **Central Functions** Universal Workted The Universal Worklist is a tool that allows you to manage tasks from multiple sources You can manage your tasks, receive alerts and handle notifications. Who Plates Withom Change Questionneire Utilities All utility functions can be found here for Procurement. Survey Reviewer Advanted Search Search for existing shopping carts and other documents. Purchasing View Asset Validation Tarile Display all the current asset validations available. **Create Documents** Surchase Of shopping Carl 2. Click on the Show Quick Criteria Maintenance toggle or use the scroll bar to scroll down to view the results. Hide Quick Criteria Maintenance
- 3. Enter the Contract Number in the Number field.
 Central Contracts All

 Hide Quick Criteria Maintenance
 Number:

 4. Use the scroll bar on the right side of the screen to scroll down the page.

| 5. | Click on the Apply button. |
|----|--|
| | Distribution: All |
| | Valid From: |
| | Smart Number: |
| | Appy Clear |
| | View [Standard View] |
| 6. | To select the desired contract, click on the gray box in the first column of the line. |
| | E Central Contract Number Central Contract Name Status |
| | 8490000051 1130-14-C-EMEC-00009 Released |
| 7. | Click on the Edit button. |
| | Create Central Contract - Conv II Display Edit |
| | Create Central Contract X Copy Contract X |
| Нс | ow to set an alert for a Valid to Date (Contract End Date) |
| 8. | Click on the Header tab. |
| | Overview Header ttems |
| 9. | Click on the Basic Data sub-tab. |
| | Overview Header |
| | Basic Data Condition Exch |
| 10 | . In the Alert Expiration field, enter the number of days to be notified before the contract expires. |
| | Example: This contract will alert the users in the Purchasing Group 30 days before the Valid To |
| | date of 04/09/2018. |
| | Dates |
| | Valid From / To: * 06/12/2015 - 04/09/2018 |
| | Alert Expiration 30 Dav(s) |
| | |
| Нс | ow to set an alert against the Contract's Released Amount |
| 11 | . Click on the Header tab. |
| | Overview Header Items |
| 12 | . Click on the Basic Data sub-tab. |
| | Overview Header |
| | Basic Data Condition Exch |
| 13 | . Enter the contract consumption percentage for generating the alert, in the Alert Release Value |
| | field under the Currency, Values, and Pricing section. |
| | Example: This alert will notify the users in the Purchasing Group when the Released Value of this contract has reached 90% of the full Target Value. |
| L | |

| Current | cy, Values and Pricin | ng | | | | | | |
|--|---|--|---|----------------------|---|--|---|--------|
| Currency | y | USD | | | | | | |
| Display (| Currency/ Exchange R | ate Date | 175 | | | | | |
| orapidy c | contrainely excitating to | | | | _ | | | |
| Target V | alue: | | 258,100.00 USD C | alculate Target Vi | lue | | | |
| Alert Rei | lease Value: | 90 % | 1 | | | | | |
| | | _ | | | | | | |
| Release | Value; | _ | 0.00 050 | | | | | |
| | a Contract A st like the fol | lert is triggere lowing examp | ed based on ble: | the criteria | a you se | et, it will c | display in the Univ | ersa |
| Show | Mail and In Drograms Al | erte (2/4) Volitications | t a Subview | - Inacking | | - | Subscription | |
| Shive | we want in Progress An | ens (274) •)(dele | a addrew | - 10 | 4 • | | Subscription | AG |
| D Pri | ionity + Subject | | | ! Sent Dat | ė | Recipients | Category | 0 |
| - | Please check (| Contract 8200027769. Cont | ract expires in 42 days | Sep 24.3 | 2015 4.08 PM | Vijay Saadhu | Alerts for Purchasing Contract | Ð |
| 0 | | | within Ch ni senimie her | Sep 24, | 2015 4:08 PM | Vijay Saadhu | Alerts for Purchasing Contract | Ø |
| 4 | Please check (| Contract 8200027771: Contr | and counce in all mays | | | | | |
| 4 | Please check (Please check (| Contract 8200027771: Cont Contract 8800000929: Cont | ract expired | Sep 24. | 2015 10:09 AM | Vijay Saadhu | Alerts for Purchasing Contract | Ø |
| 1 | Please check (Please check (Please check (| Contract 8200027771: Contr Contract 8800000929: Cont Contract 8800000929: Cont | ract expired | Sep 24, 3 | 2015 10:09 AM 2015 9:45 AM | Vijay Saadhu Vijay Saadhu | Alerts for Purchasing Contract Alerts for Purchasing Contract | 0 |
| 2 2 2 2 2 2 | Please check (Please check (Please check (| Contract 8200027771: Cont Contract 8800000929: Cont Contract 8800000929: Cont | ract expired | Sep 24, 5ep 24, | 2015 10:09 AM 2015 9:45 AM | Vijay Saadhu Vijay Saadhu | Alerts for Purchasing Contract Alerts for Purchasing Contract | 0 |
| Content of t | Please check (Please check (Please check (| Contract 8200027771: Cont Contract 8800000929: Cont Contract 8809000929: Cont | ract expired | Sep 24. Sep 24. | 2015 10:09 AM 2015 9:45 AM | Vijay Saadhu Vijay Saadhu | Alerts for Purchasing Contract Alerts for Purchasing Contract | D D |
| Content of t | the UWC alert | Contract 8200027771. Cont Contract 8800000929. Cont Contract 8809000929. Cont Contract 8809000929. Cont | cact expired (act expired (pires in 42 days) | Sep 24. Sep 24, | 2015 9:45 AM | Vijay Saadhu Vijay Saadhu | Alerts for Purchasing Contract Alerts for Purchasing Contract | 0 |
| Content of t Pleas | the UWC alert See Check Contract 82 Y | Contract 8200027771. Cont Contract 8800000929. Cont Contract 8800000929. Cont Contract 8800000929. Cont 00027769: Contract ex | contempted (ract expired (ract expired (ract expired (ract expired (ract expired (ract expires in 42 days)))))) | Sep 24. Sep 24, | 2015 9:45 AM 2015 9:45 AM Se | Vijay Saadhu Vijay Saadhu nt Date: | Alerts for Purchasing Contract Alerts for Purchasing Contract | 0 |
| Content of f | the UWL alert se check Contract 82 y' 4 vijay Saa | Contract 8200027771. Cont Contract 8800000929. Cont Contract 8800000929. Cont Contract 8800000929. Cont 000027769: Contract ex | ract expired ract expired | Sep 24, 1 Sep 24, | 2015 9:45 AM 2015 9:45 AM Se Sta | Vijay Saadhu Vijay Saadhu nt Date itus | Alerts for Purchasing Contract Alerts for Purchasing Contract Sep 24, 2015 4 08 PM New | 0 |
| Content of t Prices Priorit Recipi Expiry | the UWL alert se check Contract 82 y/ v/ ents Vijay Saar Date Sep 30, 2 | Contract 8200027771. Cont Contract 8800000929. Cont Contract 8800000929. Cont Contract 8800000929. Cont adhu 2015 10.08 PM | ract expired ract expired | Sep 24, 1 Sep 24, | 2015 9:45 AM 2015 9:45 AM Se Sta Ca | Vijay Saadhu Vijay Saadhu ni Date itus | Alerts for Purchasing Contract Alerts for Purchasing Contract Sep 24, 2015 4 08 PM New Alerts for Purchasing Contract | 0 |
| Content of t Priorit Recipi Expiry Due D | the UWL alert se check Contract 82 y' 'd lents Vijay Saa Date Sep 30, 2 bate: Sep 30, 2 | Contract 8200022771. Cont Contract 8800000929. Cont Contract 8800000929. Cont Contract 8800000929. Cont adhu 2015 10.08 PM 2015 | ract expired ract expired | Sep 24, 1 | 2015 9:45 AM 2015 9:45 AM Se Sta Ca | Vijay Saadhu Vijay Saadhu nt Date: tus: legory: | Alerts for Purchasing Contract Alerts for Purchasing Contract Sep 24, 2015 4 08 PM New Alerts for Purchasing Contract | 0 |
| Content of t Priorit Recipi Expiry Due D Descri | the UWL alert se check Contract 82 y' d pate: Sep 30, 2 pate: Sep 30, 2 pate: Sep 30, 2 pate: Sep 30, 2 | Contract 8200027771. Cont Contract 8800000929. Cont Contract 8800000929. Cont Contract 8800000929. Cont adhu 2015 10.08 PM 2015 eck Contract 8200027769 | contract expires in 42 days | Sep 24. Sep 24. | 2015 9:45 AM 2015 9:45 AM Se Sta Ca | Vijay Saadhu Vijay Saadhu nt Date: Itus: Itegory | Alerts for Purchasing Contract Alerts for Purchasing Contract Sep 24, 2015 4 08 PM New Alerts for Purchasing Contract | 0 |

Job Aid 5.3 – Compare Contract Versions

Description: The Tracking Tab contains contract information and options such as History, Status, Version Overview, and Change Documents.

Under the Version Overview selection, you can compare two versions of a document by selecting the two documents, then clicking on the Compare button.

| torpere . | Version Overview |
|-----------|------------------|
| | Detail Compare |
| | To Version |
| | 4 |
| | 2 |
| | 1 |

Below is an example of a comparison between Version 1 and Version 2:

| | Expand All Collap | | | | |
|--|--|----------------------|--|--|--|
| Header - Item/Attribute | Version 2 | Version 1 | | | |
| ▼ Header | | | | | |
| ▼ Basic Data | | | | | |
| New Serial No. | Х | | | | |
| Type of No. Scheme | SPIIN1 | PIIN | | | |
| Smart Number | 1130-13-C-SWCT-00004-V001 | 1130-13-C-SWCT-00004 | | | |
| Distribution Flag | х | | | | |
| Pmnt Terms | Z001 | 0001 | | | |
| Description | 1130-13-C-SWCT-00004-V001 | 1130-13-C-SWCT-00004 | | | |
| Attachments | | | | | |
| Description | " 8200004646-AWDN-1 " Only Exists Internally | No Record Exists | | | |