



**MAGIC
Contract
User Manual**

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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

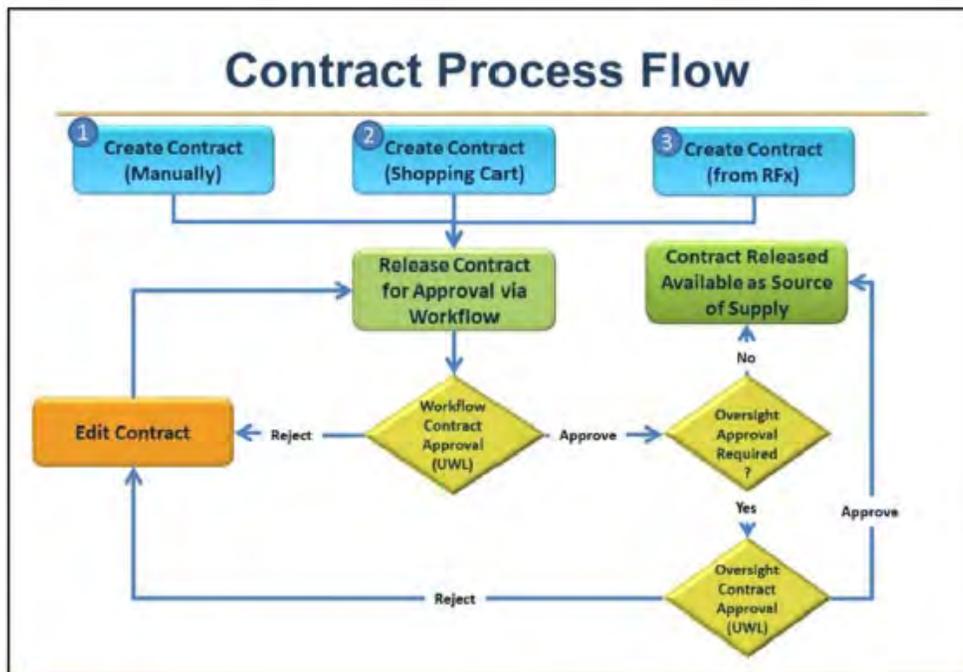
1. Create a contract manually without reference to an existing document
2. Create a contract with reference to a shopping cart (will not detail in this course)
3. Create a contract from an accepted RFx

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

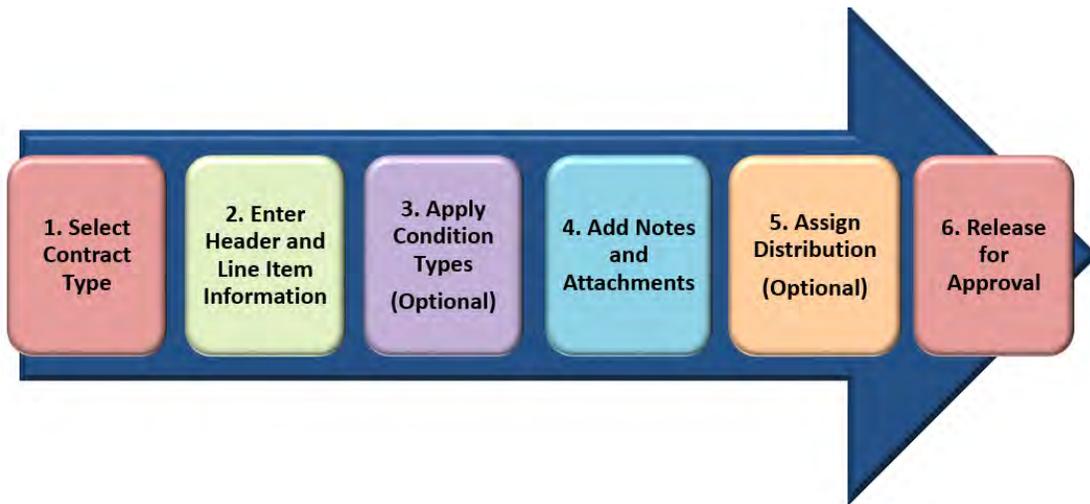
A contract shell can be created when line items are entered directly, or imported from a Shopping Cart or RFx.

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 DFA website or use the direct link to the MAGIC Portal .	
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.

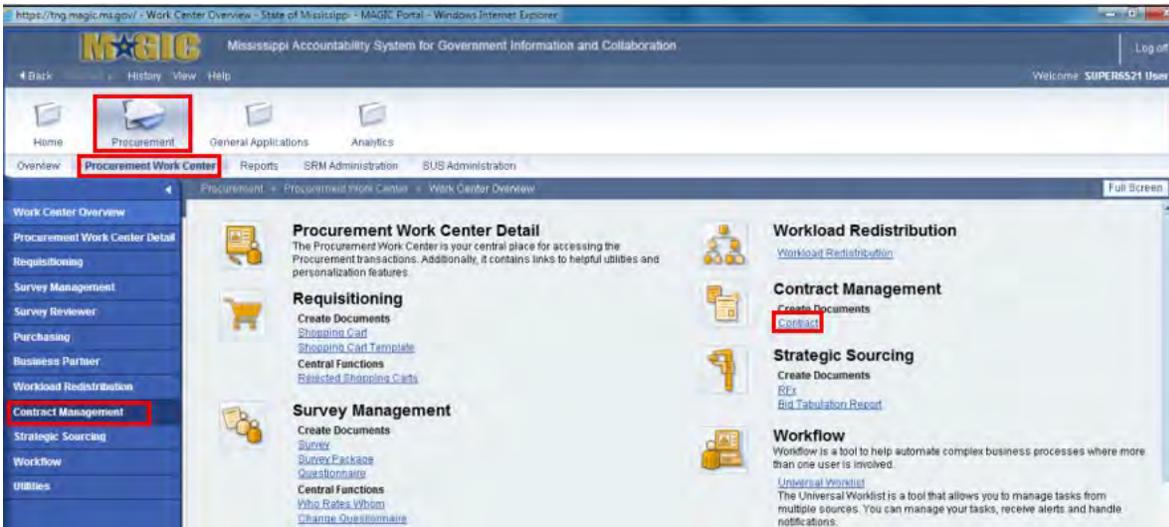
Job Aid 1.1 – Create a Manual Contract

Description: This Job Aid provides instructions on creating a manual contract.

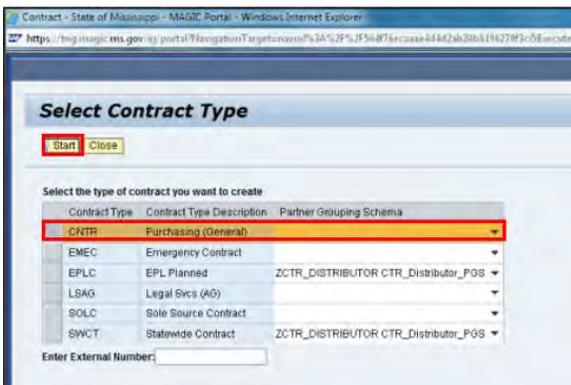
Steps

1. Start the transaction using the menu path:

SRM > Procurement > Procurement Work Center > Contract Management > Contract



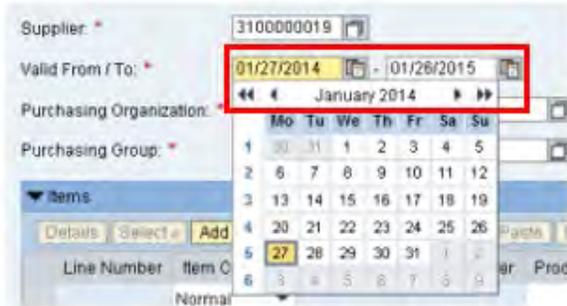
2. Select the **Contract Type** then click on **Start**.



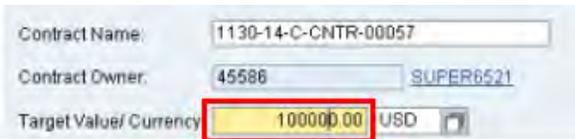
3. Enter the **Supplier Number** in the Supplier field.



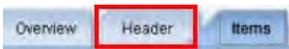
4. Enter the **Valid From/To dates**. The dates can be selected by using the pop-up calendar and **clicking the arrows to select the dates** or **enter the dates manually**.



5. Enter the Target Value of all materials to be released against the contract by **entering the amount in the Target Value/Currency** field.

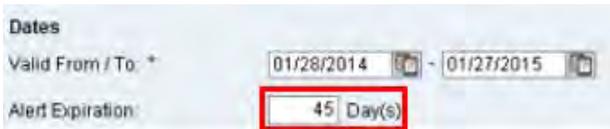


6. Click on the **Header** tab.



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**.



9. To enter an Alert Release Value, **enter the percentage in the Alert Release Value** field.

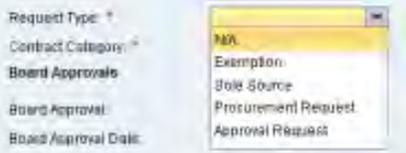


10. Use the scroll bar  on the right side of the screen to **scroll up the page**.

11. Click on the **Additional Information** tab.



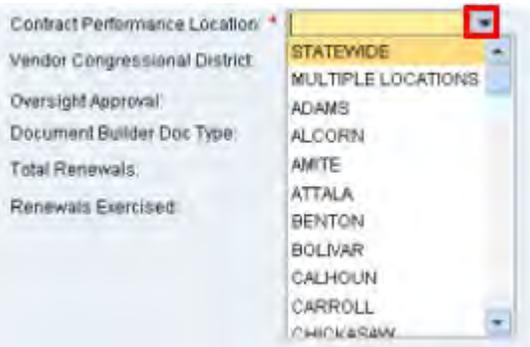
12. Click on the **Request Type** drop-down arrow, then select the **desired request type** from the drop-down list.



13. Click on the **Contract Category drop-down** arrow, then select the **desired contract category** from the drop-down list.



14. Click on the **Contract Performance Location drop-down** arrow, then select the **desired contract performance location or Statewide** from the drop-down list.



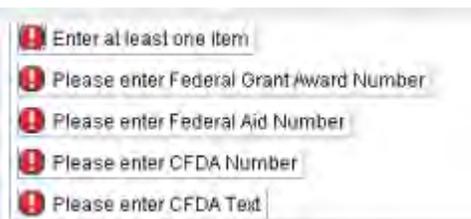
15. Use the scroll bar  on the right side of the screen to **scroll down the page**.

16. Enter **the appropriate values** in the following required * fields:

State Fund %: *	<input type="text" value="0.00"/>
Federal Funds %:	<input type="text" value="0.00"/>
Other Amount %: *	<input type="text" value="0.00"/>
Federal Amount:	<input type="text" value="0.00"/>
State Amount: *	<input type="text" value="0.00"/>
Other Amount: *	<input type="text" value="0.00"/>
Contract Total Value: *	<input type="text" value="0.00"/>

17. Click on the **Check**  button to review any system messages concerning data requirements.

Example:

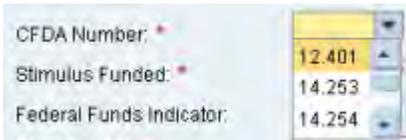


18. Enter the **Federal Grant Award number** and **Federal Aid number** in the appropriate fields.



Fed Grant Award Number: * 123456789B
Fed Aid Number: * 123456789B

19. Click the **CFDA Number drop-down** menu and **select the appropriate CFDA number**.



CFDA Number: * 12.401
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:



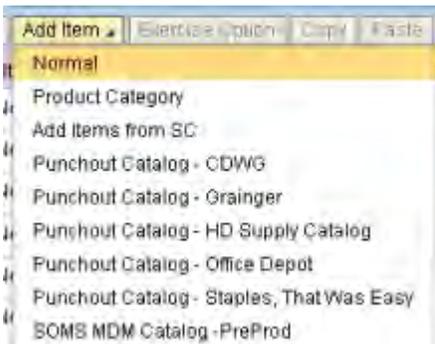
Enter at least one item
Please attach the necessary justification or contract that needs to be posted to transparency under the Notes and Attachment tab

22. Click on the **Items** tab.



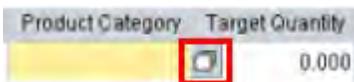
Overview Header **Items**

23. Click on **Add Item**, then select the **appropriate Item type**.



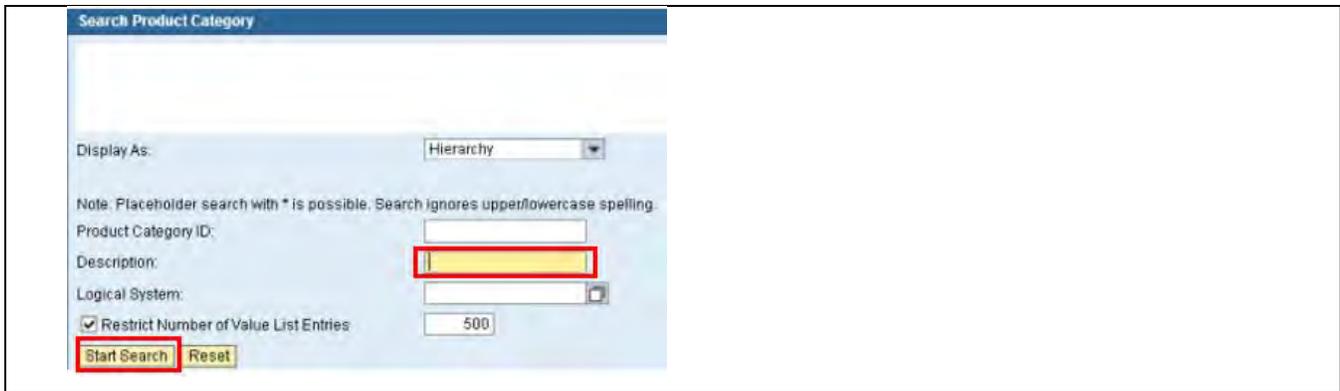
Add Item Exercise Options Copy Paste
Normal
Product Category
Add Items from SC
Punchout Catalog - CDWG
Punchout Catalog - Grainger
Punchout Catalog - HD Supply Catalog
Punchout Catalog - Office Depot
Punchout Catalog - Staples, That Was Easy
SOMS MDM Catalog -PreProd

24. Click on the **Product Category** search icon.

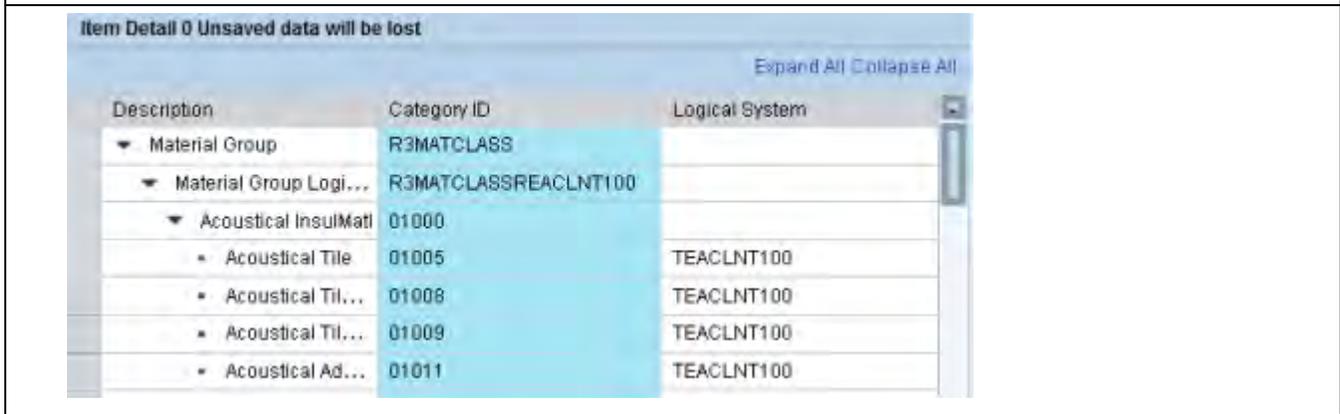


Product Category Target Quantity
0.000

25. Enter a **description of the product**, then click on **Start Search**.



26. Use the **scroll bar** to search through the list of items displayed, then **select the desired product**.



27. After you have selected the product, click **Ok**.

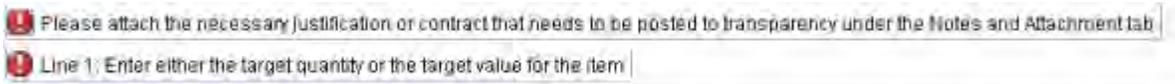


28. Enter the **following required information** about the product:

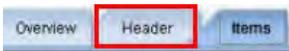


Field	Description
Description	Text to describe an object such as a material or an activity such as required maintenance.
Price	Value assigned to material or service when transferring from one company to another. The price of materials sold is usually greater than the cost. The price of materials purchased usually provides the basis for their cost in SAP.
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.

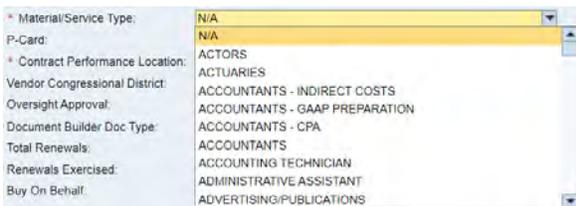
29. Click on the **Check**  button to review any system messages concerning data requirements.
Example:



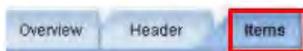
30. Click on the **Header** tab.



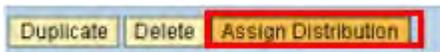
31. Click on the **Material/Service drop-down** arrow, then select the **desired service type** from the drop-down list.



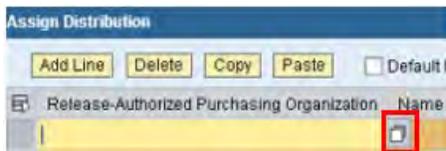
32. Click on the **Items** tab.



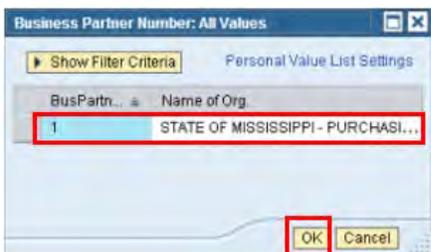
33. Click on the **Assign Distribution** button.



34. Click the **search**  icon in the Release-Authorized Purchasing Organization field.



35. Click on the **desired line item** on the Business Partner Number screen, then click on **Ok**.



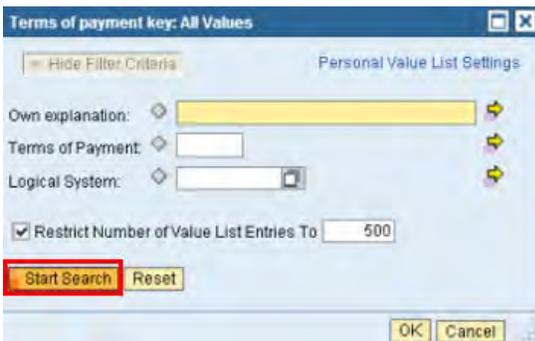
36. On the Assign Distribution pop-up screen, enter the **Target Value**. This is the total value of all materials to be released against the contract.



37. Click the **Search**  icon in the Payment Terms field. The *Terms of Payment Key: All Values* screen will display.



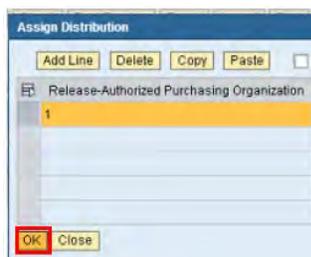
38. Click on **Start Search**.



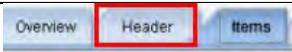
39. Click in the **gray column** to the left of the desired Terms of Payment, then click on **Ok**.



40. Click on **Ok** on the Assign Distribution pop-up screen.



41. Click on the **Header** tab.



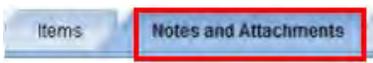
42. Click on the **Distribution** sub-tab.



43. Enter the **Target Value of all materials to be released against the contract** in the Target Value field.



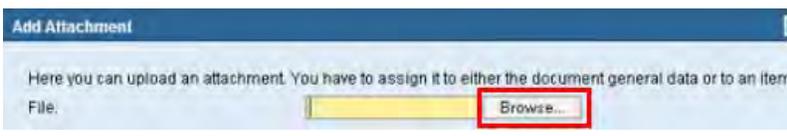
44. Click on the **Notes and Attachments** tab.



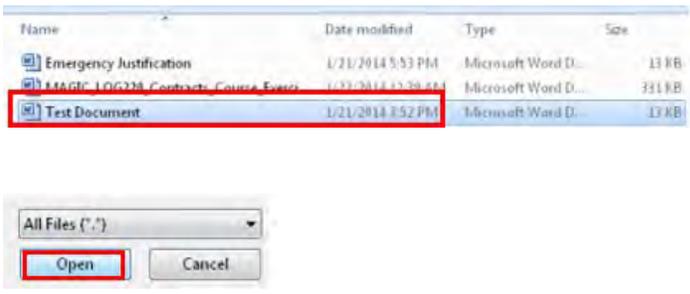
45. Click on the **Add Attachment** button.



46. When the Add Attachment window appears, click on the **Browse** button to locate the file.



47. Choose **the file to attach**, then click on **Open**.



48. Enter a **description of the file** that is being attached in the Description field.



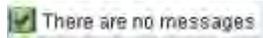
49. Click in the box beside **“Keep This Attachment Internal”** to unselect the option.



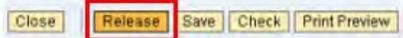
50. Click **Ok**.

51. Click on the **Check**  button to review any system messages concerning data requirements.

Example:



52. Once there are no more system messages, click on the **Release** button.



53. Click on the **Close** button.



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  – 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  to expand the Navigation panel.



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. 

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

Contract Type	Contract Type Description	Partner Grouping Schema
BRCT	BRICKS - Constructio	
BRLE	BRICKS - Lease	
CNTR	Purchasing (General)	
EMEC	Emergency Contract	
SOLC	Sole Source Contract	ZCTR_DISTRIBUTOR CTR_Distributor_PGS
SWCT	Statewide Contract	ZCTR_FULFILLMENT CTR_Fulfillment_PGS

Enter External Number:

2. Distributors and Fulfillment vendors are added to the contract under the Header Partner functions.

Partner

Details Add Send E-Mail Call Clear

Func	Purch. Org. Auth. For Release	Exclude	Number	Name
• Sub	Location	<input type="checkbox"/>		
• Go	Goods Recipient	<input type="checkbox"/>		
• Distributor		<input type="checkbox"/>		
• Responsible Employee		<input type="checkbox"/>	10463	Robert Fulcher
• Purch. Org. Auth. For Release		<input type="checkbox"/>	1	SCMS
• Location		<input type="checkbox"/>		
• Distributor		<input type="checkbox"/>	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:

Contract Owner: [Robert Fulcher](#)

Target Value/ Currency:

Release Value:

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

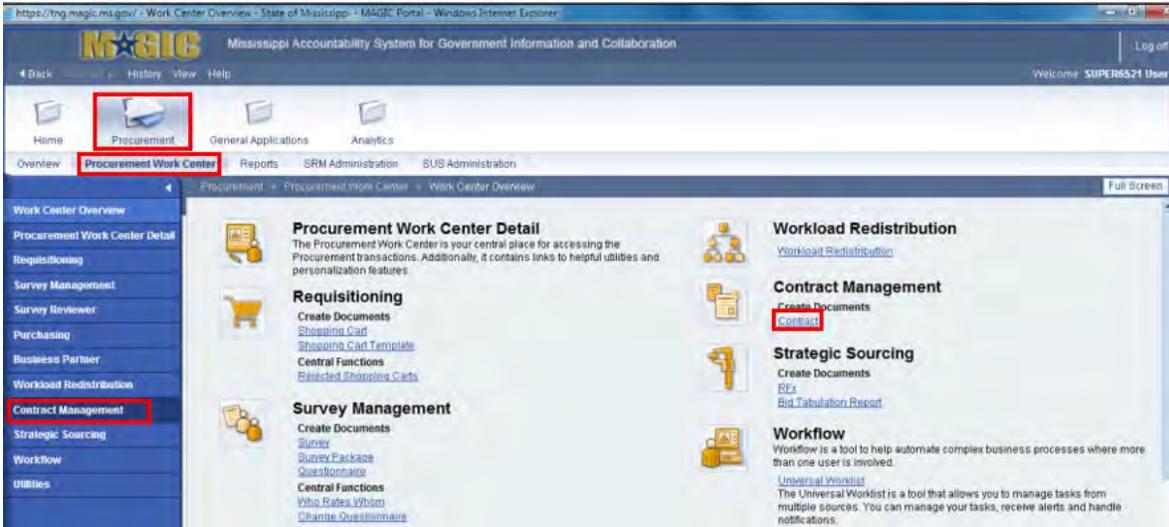
Job Aid 1.5 – Create a Contract with Options

Description: This Job Aid provides instructions on creating a contract with options.

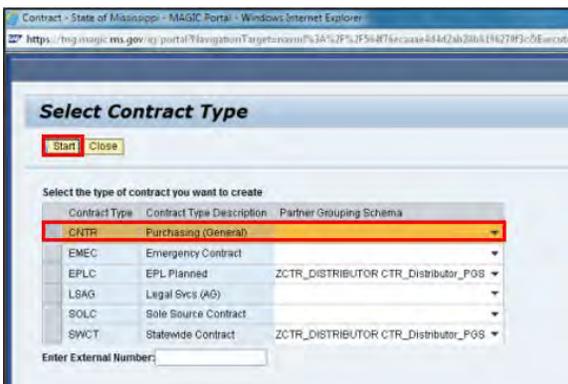
Steps

1. Start the transaction using the menu path:

SRM > Procurement > Procurement Work Center > Contract Management > Contract



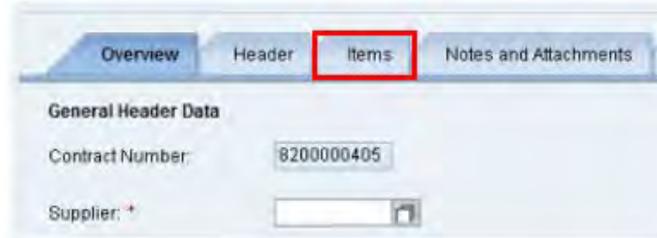
2. Select the Contract type by clicking on the **line of the desired contract type**, then click on **Start**.



3. Enter the **Supplier Number** in the Supplier field.



4. Click on the **Items** tab.



5. As required, complete or review the following fields:



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 features. 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**  button to review any system messages concerning data requirements.
Example:

- 1 Please enter Contract Category in Additional Information
- 2 Please enter Request Type in Additional Information
- 3 Please enter Contract Performance Location in Additional Information
- 4 Please enter Contract Total Value
- 5 Please attach the necessary justification or contract that needs to be posted to transparency under the Notes and Attachment tab

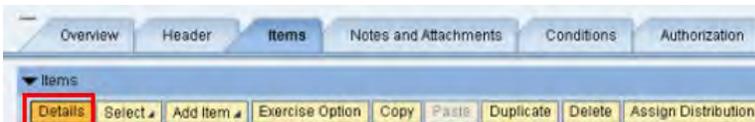
7. Click the **line number** to assign an Option Type.

Line Number	Item Category	Option Type	Item Number	Product ID	Description	Product Category
1	Normal		1	39049766866	TURKEY, ROLL	39048
2	Normal		3	39049766866	TURKEY, ROLL	

8. Click on the **Option Type drop-down menu** , then select **Optional**.

Line Number	Item Category	Option Type
1	Normal	
2	Normal	
	Normal	Optional
	Normal	

9. Click on the **Details** button.



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

11. Click on Period of Performance field to enter **the beginning and ending dates**.

Reference Item Number: 0

Distribute Contract to Catalog: No

Distribution:

Block Local Sourcing:

Reason Code:

Period of Performance: *  

Acceptance at Origin:

Alert Release Value: %

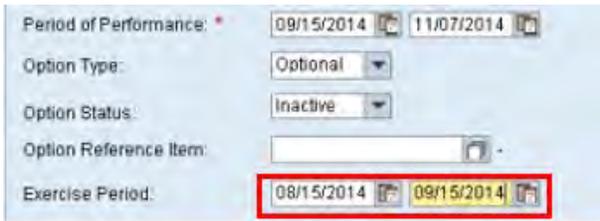
Minimum Order Quantity: LB

Minimum Order Value: USD

The dates can be selected by using the pop-up calendar and **clicking the arrows** or the **dates can be entered manually**.



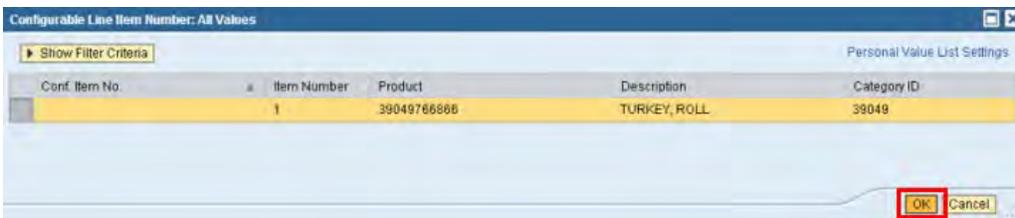
12. Enter the Exercise Period **beginning and end dates**.



The dates can be selected by using the pop-up calendar and **clicking the arrows** or the **dates can be entered manually**.

13. Click on the **Option Reference Item search icon** .

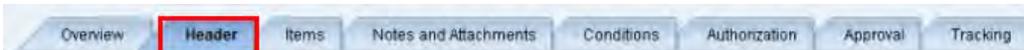
14. Select the **line number**, then click on **OK**.



Conf. Item No.	Item Number	Product	Description	Category ID
	1	39049766866	TURKEY, ROLL	39049

15. Use the **up arrow scroll bar** on the right side of the screen  to **scroll back up the page**.

16. Click on the **Header** tab.



17. Click on **Additional Information**.



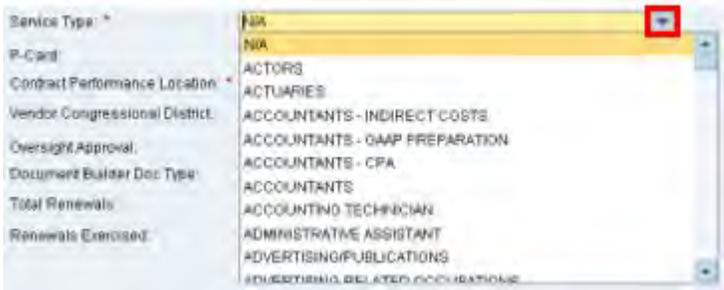
18. Click on the **Request Type drop-down arrow**, then select the **desired request type** from the drop-down list.



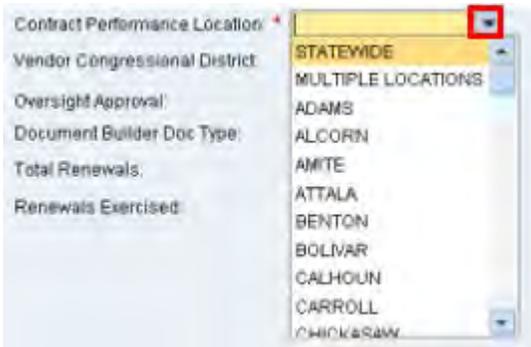
19. Click on the **Contract Category drop-down arrow**, then select the **desired contract category** from the drop-down list.



20. Click on the **Service Type drop-down arrow**, then select the **desired service type** from the drop-down list.



21. Click on the **Contract Performance Location drop-down arrow**, then select the **desired contract performance location or Statewide** from the drop-down list.



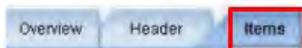
22. Use the scroll bar  on the right side of the screen to **scroll down the page for additional options**.

23. Enter the appropriate values in the following required * fields:

State Fund %: *	<input type="text" value="0.00"/>
Federal Funds %:	<input type="text" value="0.00"/>
Other Amount %: *	<input type="text" value="0.00"/>
Federal Amount:	<input type="text" value="0.00"/>
State Amount: *	<input type="text" value="0.00"/>
Other Amount: *	<input type="text" value="0.00"/>
Contract Total Value: *	<input type="text" value="0.00"/>

24. Use the scroll bar  on the right side of the screen to **scroll up the page**.

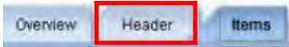
25. Click on the **Items** tab.



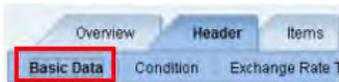
26. Enter the **Target Value** in the appropriate line under the Target Value Heading.

Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Price Per
TURKEY, ROLL	360149	1,000		LB	5000	1.54	USD	1
TURKEY, ROLL	360149	1,000	Inactive	LB	0.00	1.54	USD	1

27. Click on the **Header** tab.



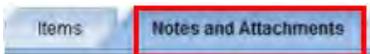
28. Click on **Basic Data**.



29. Click on **Calculate Targe Value**.



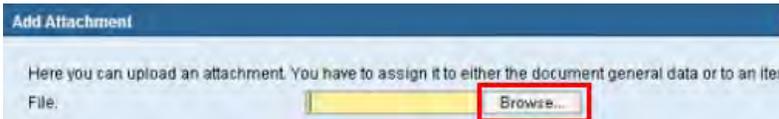
30. Click on the **Notes and Attachments** tab.



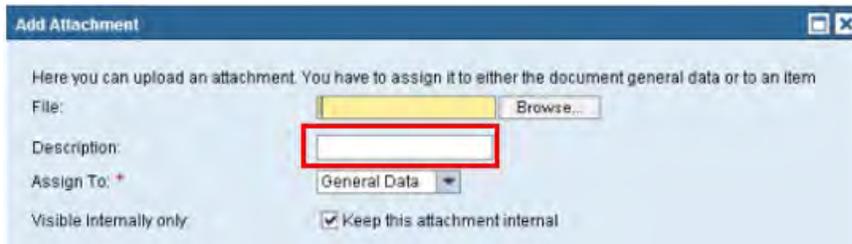
31. Click on the **Add Attachment** button.



32. When the Add Attachment window appears, click on the **Browse** button to locate the file.



33. Enter a **description of the file** that is being attached in the Description field.



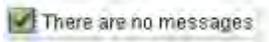
34. Click in the box beside **“Keep This Attachment Internal”** to unselect the option.



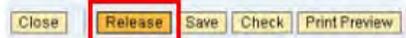
35. Click the **Ok** button.



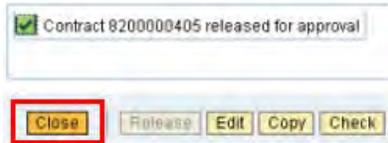
36. Click on the **Check**  button to review any system messages concerning data requirements.
Example:



37. Once there are no more system messages, click on the **Release** button.



38. Click on the **Close** button.



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.

Steps

1. Start the transaction using the menu path:

SRM > Procurement > Procurement Work Center > Contract



2. Select the **desired contract type (Emergency Contract)** by clicking on the line, then click on **Continue**.



3. Enter the **Supplier Number** in the Supplier field.



4. Click on the **Items** tab.

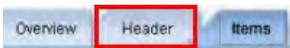


5. As required, complete or review the following fields:

Line Number	Item Category	Option Type	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency
	Normal			39049766866	TURKEY, ROLL	39049	1000		LB	0.00	1.54	USD
	Normal			39049766866	TURKEY, 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 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 **Header** tab.



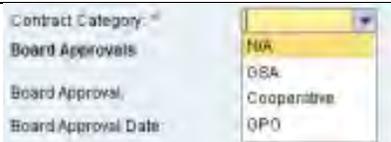
7. Click on the **Additional Information** tab.



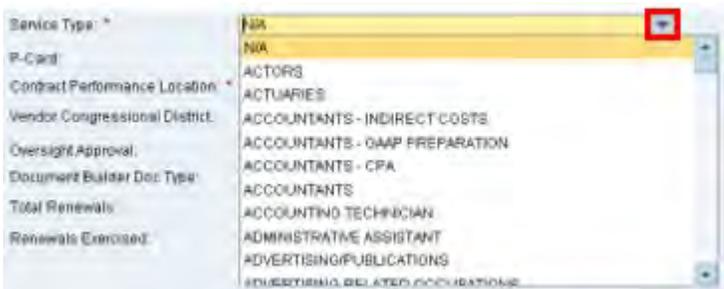
8. Click on the **Request Type drop-down arrow**, then select the **desired request type** from the drop-down list.



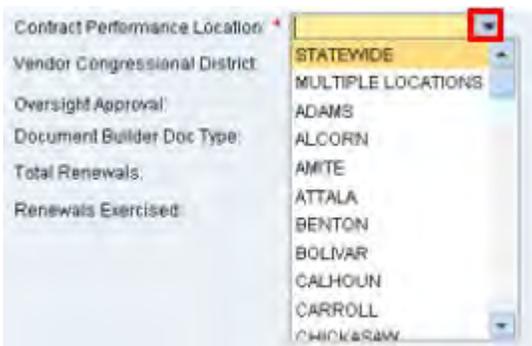
9. Click on the **Contract Category drop-down arrow**, then select the **desired contract category** from the drop-down list.



10. Click on the **Service Type drop-down** arrow, then select the **desired service type** from the drop-down list.



11. Click on the **Contract Performance Location drop-down** arrow, then select the **desired contract performance location or Statewide** from the drop-down list.



12. Use the scroll bar  on the right side of the screen to **scroll down the page for additional options**.

13. Enter the **appropriate values** in the following required * fields:

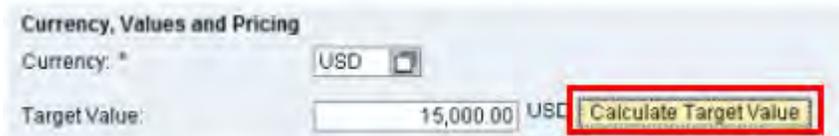
State Fund %: *	<input type="text" value="0.00"/>
Federal Funds %:	<input type="text" value="0.00"/>
Other Amount %: *	<input type="text" value="0.00"/>
Federal Amount:	<input type="text" value="0.00"/>
State Amount: *	<input type="text" value="0.00"/>
Other Amount: *	<input type="text" value="0.00"/>
Contract Total Value: *	<input type="text" value="0.00"/>

14. Use the scroll bar  on the ride side of the screen to **scroll up the page**.

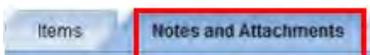
15. Click on the **Basic Data** sub-tab.



16. Click on the **Calculate Target Value** button.



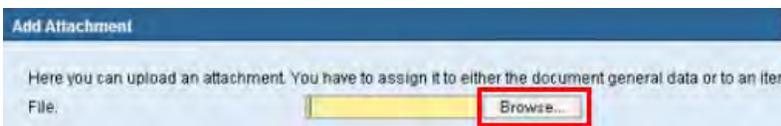
17. Click on the **Notes and Attachments** tab.



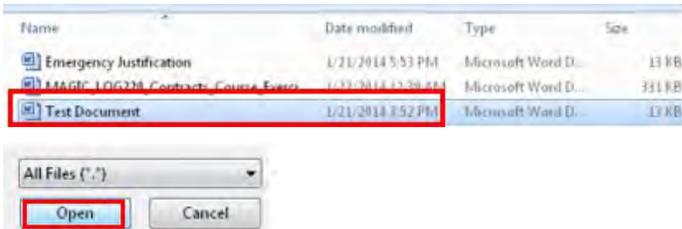
18. Click on the **Add Attachment** button.



19. When the Add Attachment window appears, click on the **Browse** button to locate the file.



20. Choose **the file to attach**, then click on **Open**.



21. Enter a **description of the file** that is being attached in the Description field.



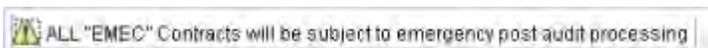
22. Click in the box beside **“Keep This Attachment Internal”** to unselect the option.



23. Click **Ok**.

24. Click on the **Check**  button to review any system messages concerning data requirements.

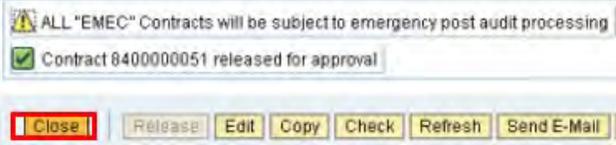
Example:



25. Click on the **Release** button.



26. Click on the **Close** button.



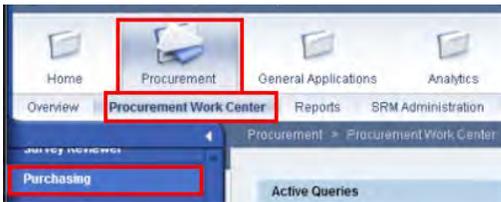
Job Aid 1.7 – Create a Contract with Reference to a Shopping Cart

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

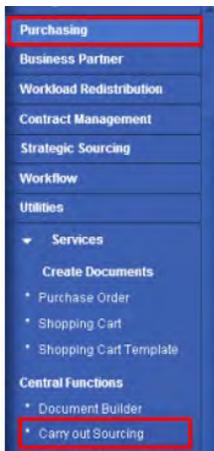
Steps

1. Start the transaction using the menu path:

SRM > Procurement > Procurement Work Center > Purchasing > Carry Out Sourcing



Use the **scroll bar in the left column** to view more options. Select **Carry Out Sourcing**.



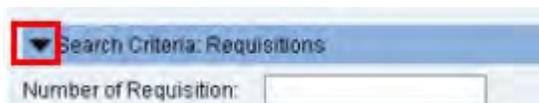
2. Enter the **Requisition Number** in the Number of Requisition field.



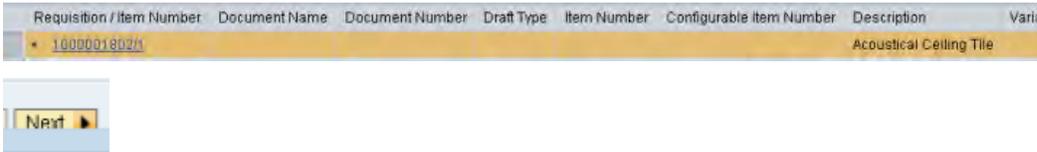
3. Click on the **Search** button.



4. Click the **down arrow icon** ▼ to minimize the search criteria.



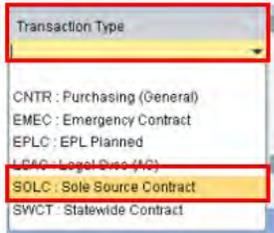
5. Click on the **appropriate shopping cart line**, then click on the **Next** button.



6. Click on the **Create Draft** button to view the drop-down of options, then select **Contract**.



7. Click on the **Transaction Type** drop-down to view the list of types, then select the appropriate **Transaction Type**.



8. Click on the **Edit Selected Drafts** button.



9. Click on the **Supplier search** icon. The *Supplier: All Values* pop-up window will display.



10. Enter the **Name of the Supplier** in the Name1/last name field.



11. Click on the **Start Search** button at the bottom of the pop-up window.

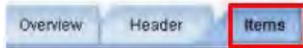


12. Use the **scroll bar to scroll down** or the right side to see the results, then click on the **appropriate line to select the supplier**.

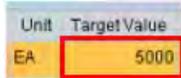
13. Once you have highlighted the supplier, click on the **Ok** button.



14. Click on the **Items** tab.



15. Enter the **Target Value** in the appropriate line under the Target Value Heading.



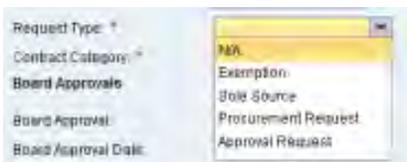
16. Click on the **Header** tab.



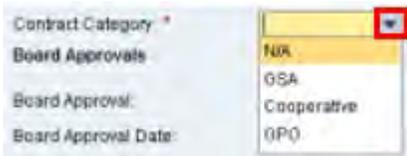
17. Click on **Additional Information**.



18. Click on the **Request Type** drop-down arrow, then select the **appropriate request type** from the drop-down list.

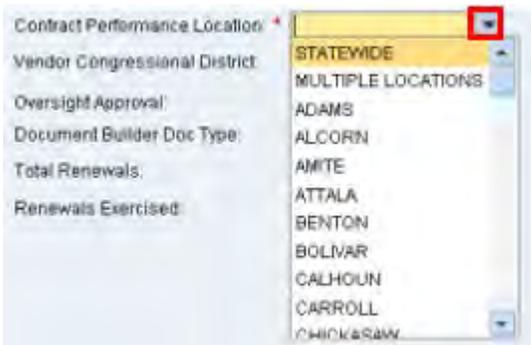


19. Click on the **Contract Category** drop-down arrow, then select the **appropriate contract category** from the drop-down list.



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.



22. Use the scroll bar  on the right side of the screen to **scroll down the page for additional options.**

23. Enter the **appropriate values** in the following required * fields:

State Fund %: *	<input type="text" value="0.00"/>
Federal Funds %:	<input type="text" value="0.00"/>
Other Amount %: *	<input type="text" value="0.00"/>
Federal Amount:	<input type="text" value="0.00"/>
State Amount: *	<input type="text" value="0.00"/>
Other Amount: *	<input type="text" value="0.00"/>
Contract Total Value: *	<input type="text" value="0.00"/>

24. Use the scroll bar  on the right side of the screen to **scroll up the page.**

25. Click on **Basic Data.**



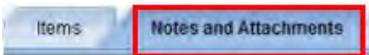
The screenshot shows a navigation menu with tabs: Overview, Header, and Items. Under the Header tab, there are sub-tabs: Basic Data (highlighted with a red box), Condition, and Exchange Rate T.

26. Click on **Calculate Targe Value.**



The screenshot shows the 'Currency, Values and Pricing' section. The 'Currency: *' is set to 'USD'. The 'Target Value:' is '5,000.00 USD'. A button labeled 'Calculate Target Value' is highlighted with a red box.

27. Click on the **Notes and Attachments** tab.



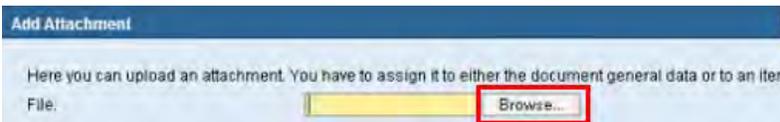
The screenshot shows a navigation menu with tabs: Items and Notes and Attachments (highlighted with a red box).

28. Click on the **Add Attachment** button.



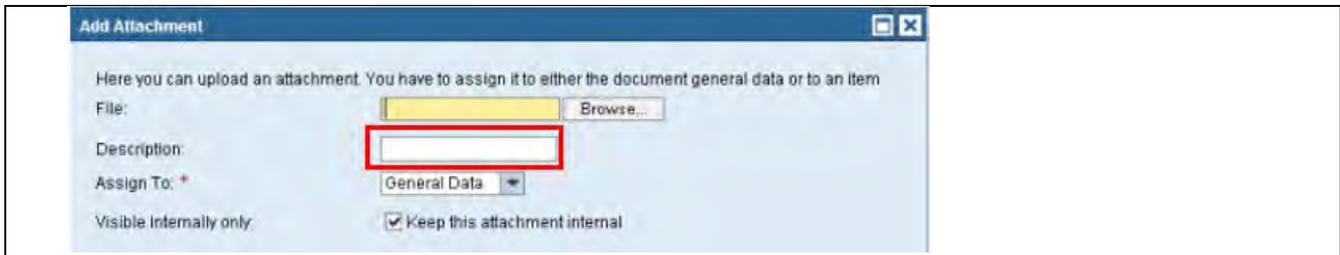
The screenshot shows the 'Attachments' section with a dropdown arrow. Below it, there are buttons: Add Attachment (highlighted with a red box), Edit Description, and Versioning.

29. When the Add Attachment window appears, click on the **Browse** button to locate the file.



The screenshot shows the 'Add Attachment' window. It contains the text: 'Here you can upload an attachment. You have to assign it to either the document general data or to an item'. Below this, there is a 'File:' label, a text input field, and a 'Browse...' button (highlighted with a red box).

30. Enter a **description of the file** that is being attached in the Description field.



31. Click in the box beside **Keep This Attachment Internal** to unselect the option.

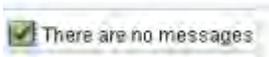


32. Click the **Ok** button.



33. Click on the **Check**  button to review any system messages concerning data requirements.

Example:



34. Click on the **Release** button.



35. Click on the **Close** button.



Unit 2 – Modify a Contract

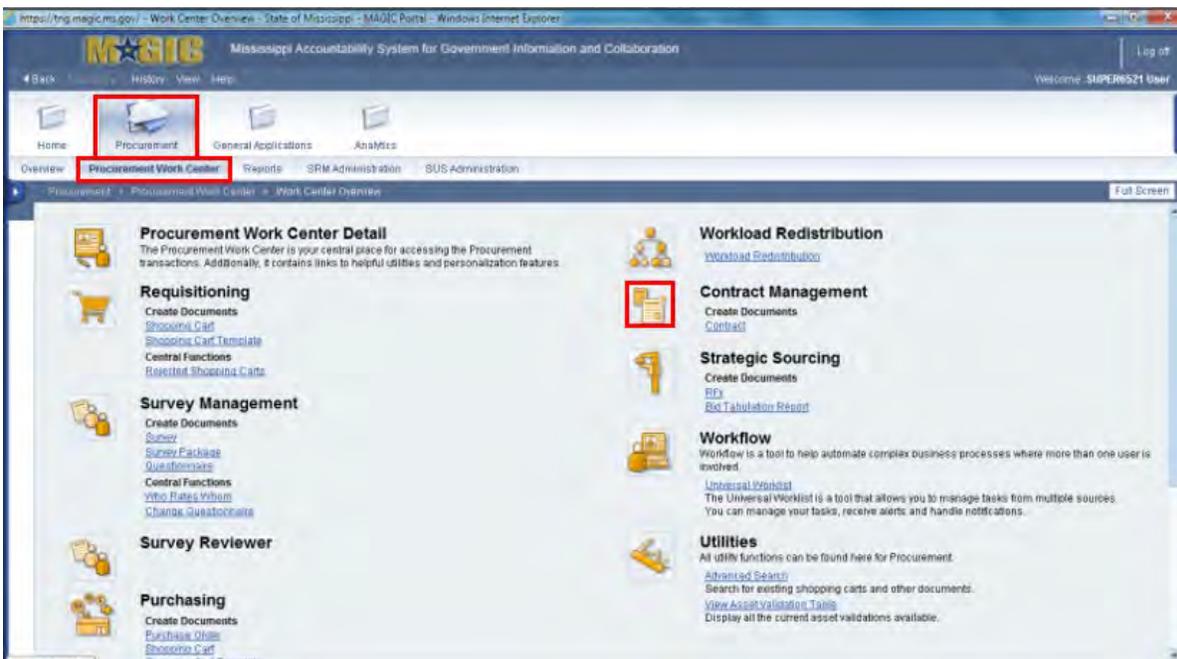
Job Aid 2.1 – Amend a Contract

Description: This Job Aid provides instructions on amending a contract.

Steps

1. Start the transaction using the menu path:

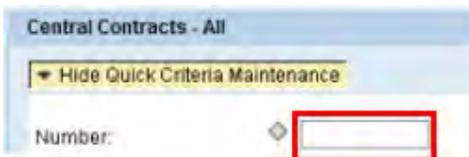
SRM > Procurement > Procurement Work Center > Contract Management



2. Click on the **Show Quick Criteria Maintenance** toggle or use the scroll bar to **scroll down to view the results**.



3. Enter the **Contract Number** in the Number field.



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:

Apply Clear

View: [Standard View] Create Central Contract Copy

6. To select the desired contract, click on the **gray box in the first column of the line.**

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.

Reason Code: *

Distribute Contract to Catalog: Internal Modification
External Modification
Oversight (Emergency/Catastrophic)

Organization:

Purchasing Organization:

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: * AMENDED
ADD/DELETE ATTACHMENT

Board Approvals

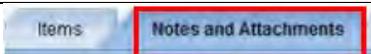
13. Select the **appropriate Modification Type** from the drop-down list.

14. Enter a **description for the contract modification** in the Modification Description field.

Modification Type: * ADD/DELETE ATTACHMENT

Modification Description: * **Justification for Emergency Food Order**

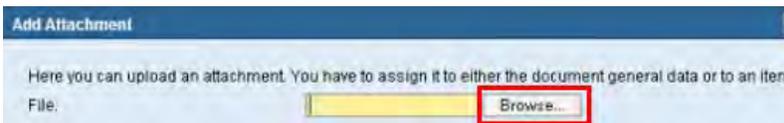
15. Click on the **Notes and Attachments** tab.



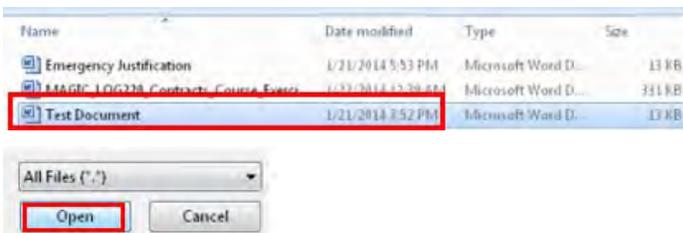
16. Click on the **Add Attachment** button.



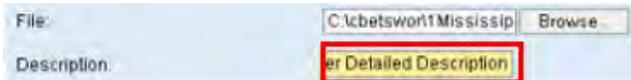
17. When the Add Attachment window appears, click on the **Browse** button to locate the file.



18. Choose **the file to Attach**, then click on **Open**.



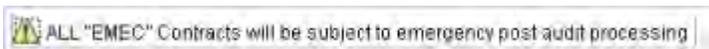
19. Enter a **description of the file** that is being attached in the Description field.



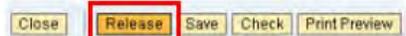
20. Click **Ok**.

21. Click on the **Check**  button to review any system messages concerning data requirements.

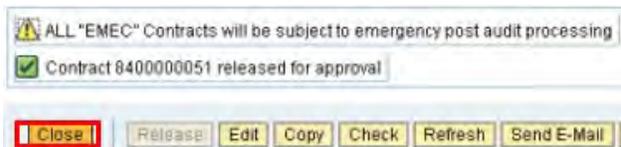
Example:



22. Click on the **Release** button.



23. Click on the **Close** button.



Job Aid 2.2 – Terminate a Contract

Description: This Job Aid provides instructions on how to terminate a contract.

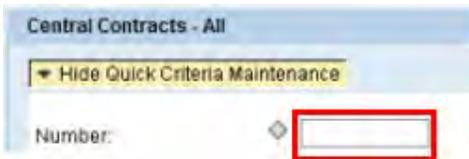
Steps

1. Start the transaction using the menu path:

SRM > Procurement > Procurement Work Center > Contract Management

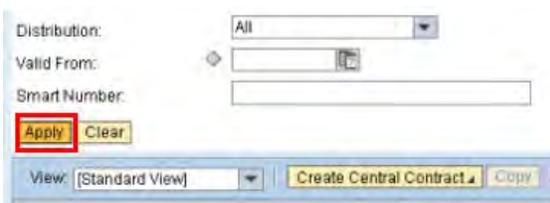


2. Enter the **Contract Number** in the Number field.



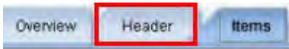
3. Use the scroll bar  on the right side of the screen to **scroll down the page**.

4. Click on the **Apply** button.



5. Click on the **Contract number** to open the contract.

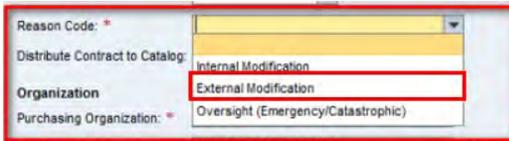
6. Click on the **Header** tab.



7. Click on the **Edit** button.



8. Click on the **Reason Code** drop-down menu, then select **External Modification** as the Reason Code.



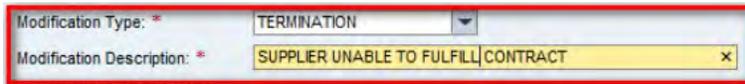
9. Click on the **Additional Information** tab.



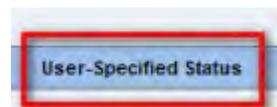
10. Click on the **Modification Type** drop-down menu, then select **Termination** as the Type.



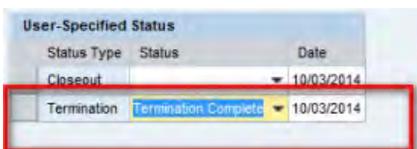
11. Enter a **description for the contract modification** in the Modification Description field. Note: The description entered in this field will display in Transparency.



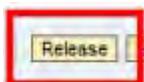
12. Click on the **User-Specified Status** tab.



13. Select **Termination Complete** as the Termination value. The date will default to the current date; however, the date can be changed if needed.



14. Click on the **Release** button. The contract must be in a released status for it to be closed.



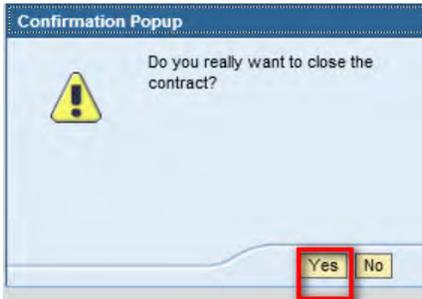
15. Click on the **Edit** button.



16. Click on the **Inactivate Contract** button.



17. The Confirmation pop-up screen will display. Click on **Yes** to confirm.



18. The Contract Status will display 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.

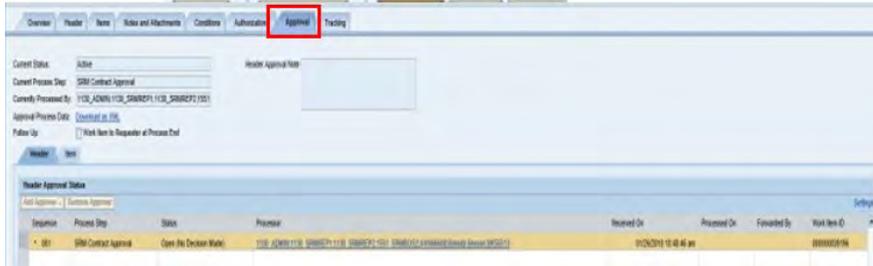
Approval Types

Term	Definition
Agency Buyer Manager	<ul style="list-style-type: none">• The Agency Buyer Manager Approval is the first in the sequence of approval steps.• 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.
Board (Offline)	<ul style="list-style-type: none">• 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.• 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.

	
Oversight	<ul style="list-style-type: none"> • Oversight approvers include OPSCR, OPTFM, ITS, SPB, and AG. • 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.



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.

Job Aid 3.1 – Review, Edit, Approve, or Reject a Contract

Description: This Job Aid provides instructions on using the Universal Worklist to review, edit, approve, or reject a contract.

Steps

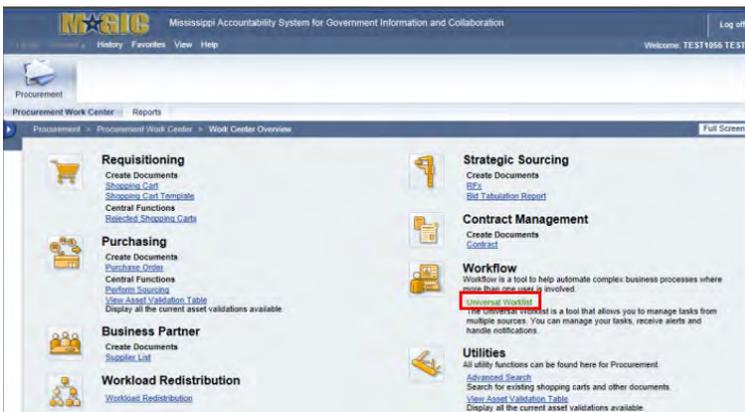
1. Start the transaction using the menu path:

SRM > Procurement > Universal Worklist



Click on **Procurement**.

2. Click on **Universal Worklist (UWL)**.



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.



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.



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

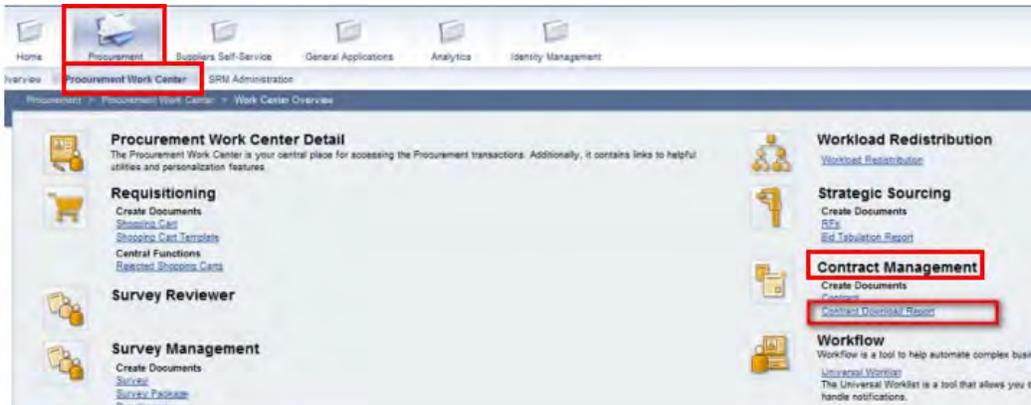
Description: This Job Aid provides instructions on how to download a contract. This report can be run with a variety of parameters such as:

- 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.

The screenshot shows the 'Contract Summary Report' screen. The 'Output Selections' section is highlighted with a red box. It contains two radio button options: 'Display ALV' (which is selected) and 'Display ALV and Download file'. The 'Contract Selection' section includes fields for Agency, Contract Number, Contract Type, Contract Status (set to 'Released'), Vendor Number, Creation Date, and Validity Date.

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

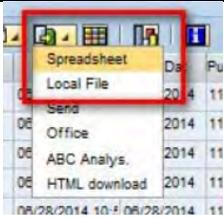
- Once the report has been executed, the results will be displayed. Using the **bottom scroll bar**, you can move the report to see the contract header fields.

Agency	Contract ID	Contract Description	Legacy Contract	Created At	Posting Date	Purchasing Group	Valid From	Valid To	Total Amt	Rel. Amt	Open Amt	Vendor No.
hasing (Ge 8200001667)	1130-14-C-CNT	IT20140285	06/28/2014 10:06/28/2014	1130 GEN PUR	06/28/2014	10/31/2014	2,912.50	0.00	2,912.50	3100020096		
hasing (Ge 8200001677)	1130-14-C-CNT	IT20140279	06/28/2014 10:06/28/2014	1130 GEN PUR	06/28/2014	01/31/2015	6,874.33	0.00	6,874.33	3100004710		
hasing (Ge 8200001678)	1130-14-C-CNT	IT20140284	06/28/2014 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	IT20140296	06/28/2014 10:06/28/2014	1130 GEN PUR	06/28/2014	11/30/2014	3,206.00	0.00	3,206.00	3100020809		
hasing (Ge 8200001689)	1130-14-C-CNT	IT20140324	06/28/2014 10:06/28/2014	1130 GEN PUR	06/28/2014	12/31/2014	21,216.78	0.00	21,216.78	3100020096		
hasing (Ge 8200001690)	1130-14-C-CNT	IT20140333	06/28/2014 10:06/28/2014	1130 GEN PUR	06/28/2014	12/31/2014	755.28	0.00	755.28	3100017697		
hasing (Ge 8200002043)	1130-14-C-CNT	IT20140325	06/28/2014 11:06/28/2014	1130 GEN PUR	06/28/2014	12/31/2014	2,662.50	0.00	2,662.50	3100003968		
hasing (Ge 8200002052)	1130-14-C-CNT	IT20140334	06/28/2014 11:06/28/2014	1130 GEN PUR	06/28/2014	12/31/2014	2,000.00	0.00	2,000.00	3100020096		
hasing (Ge 8200002053)	1130-14-C-CNT	IT20140335	06/28/2014 11:06/28/2014	1301 GEN PUR	06/28/2014	12/31/2014	3,647.00	0.00	3,647.00	3100021093		
hasing (Ge 8200002137)	1130-14-C-CNT	IT20140136	06/28/2014 11:06/28/2014	1130 GEN PUR	06/28/2014	06/31/2014	39,979.76	0.00	39,979.76	3100000273		
hasing (Ge 8200002237)	1130-14-C-CNT	C130-090289	06/28/2014 11:06/28/2014	1130 GEN PUR	06/28/2014	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	06/28/2014	12/31/2014	61,000.00	0.00	61,000.00	3100028666		

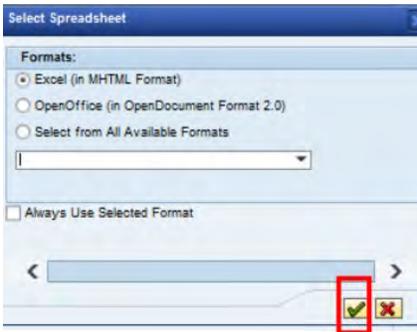
- To view relevant line information for the contract, click on the **hyperlink of the contract number** and the details will be displayed below.

LINE	Item No.	Item Type	Item Desc.	Prod. Category	Mat. Master	Suppl. Partn.	UOM	Price Per Unit	Price	Target Qty	Target Vt
LINE	1			91629			AU	1	0.00	0.000	3,647
LINE	2			20791			EA	1	0.00	0.000	3,647
LINE	3			20495			EA	1	0.00	0.000	3,647

- To download the data, click on the **Export** icon and select **Spreadsheet**.



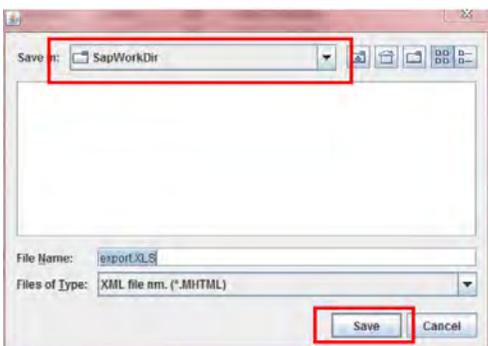
7. The following prompts will be shown, **leave the default value of Excel** and click the **green checkbox**.



8. Click the **Run** button when the Java pop-up window displays.



9. Select the **location to save your file** (i.e. Desktop, My Documents, etc.) then click on the **Save** button.



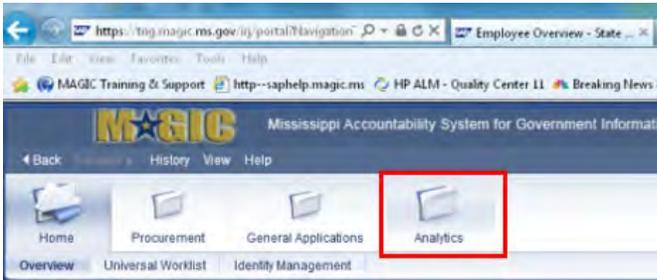
Job Aid 4.2 – Contract Management Report

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



2. Click on the **Applications** button in the top right of the screen.



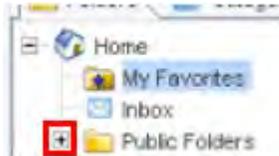
3. Select **Web Intelligence Application**.

Web Intelligence Application

4. Click on the **folder icon**. The *Open a Document from Server* pop-up screen will display.



5. Click on the **plus sign +** beside the Public Folders icon.



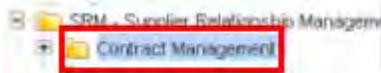
6. Click on the **plus sign +** beside the State of Mississippi folder.



7. Click on the **plus sign +** beside the SRM-Supplier Relationship Management folder.



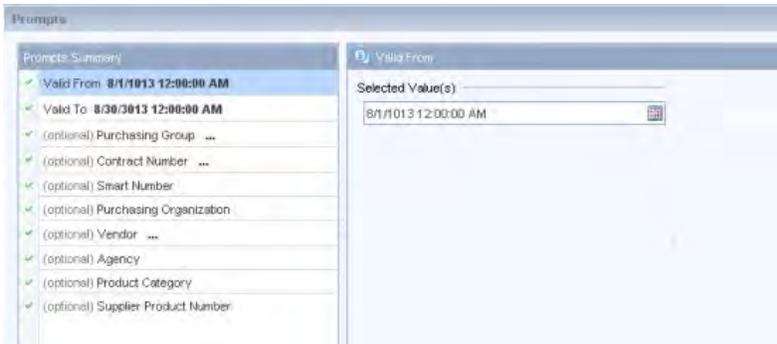
8. Click on the **Contract Management** folder. A list of files will display to the right.



9. Select the appropriate report from the list by **double-clicking on the file name**. The Prompts pop-up window will display.



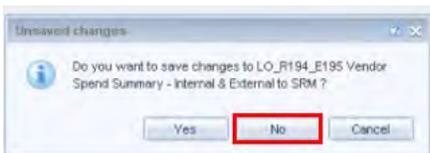
10. Select the **desired search criteria**. The Valid from and Valid To are required fields. All others are optional.



11. When you have selected the desired search criteria, click the **Ok** button. The report information will be displayed.



12. When you close the report window, a pop-up message will display asking if you would like to save changes to the report. Click on the **No** button.



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

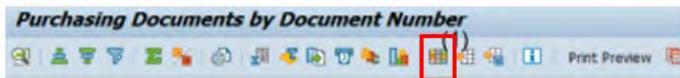
Description: Four new fields that have been added to the ME2K, ME2L, and ME2N Reports.

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*

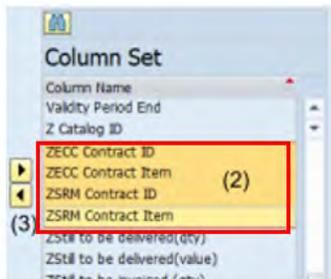
This Job Aid provides instructions on including the new fields to your report layout.

Steps

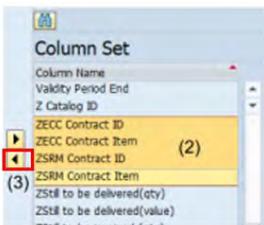
1. Select the **Change Layout** icon  .



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.



*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.

Steps

1. Start the transaction using the menu path:

MAGIC Portal>Procurement>Utilities - Advanced Search



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



3. Enter the **SAAS Contract Number** in the Reference Contract Number field.
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.



A screenshot of a search form. It features two input fields: 'Valid From' and 'Reference Contract Number'. The 'Reference Contract Number' field is highlighted with a red rectangular box. To the right of the 'Reference Contract Number' field is a yellow search button with a magnifying glass icon.

4. Click on the **Search** button.



The Contract information will be displayed in the Search Results section.

Job Aid 5.2 – Setting Contract Alerts

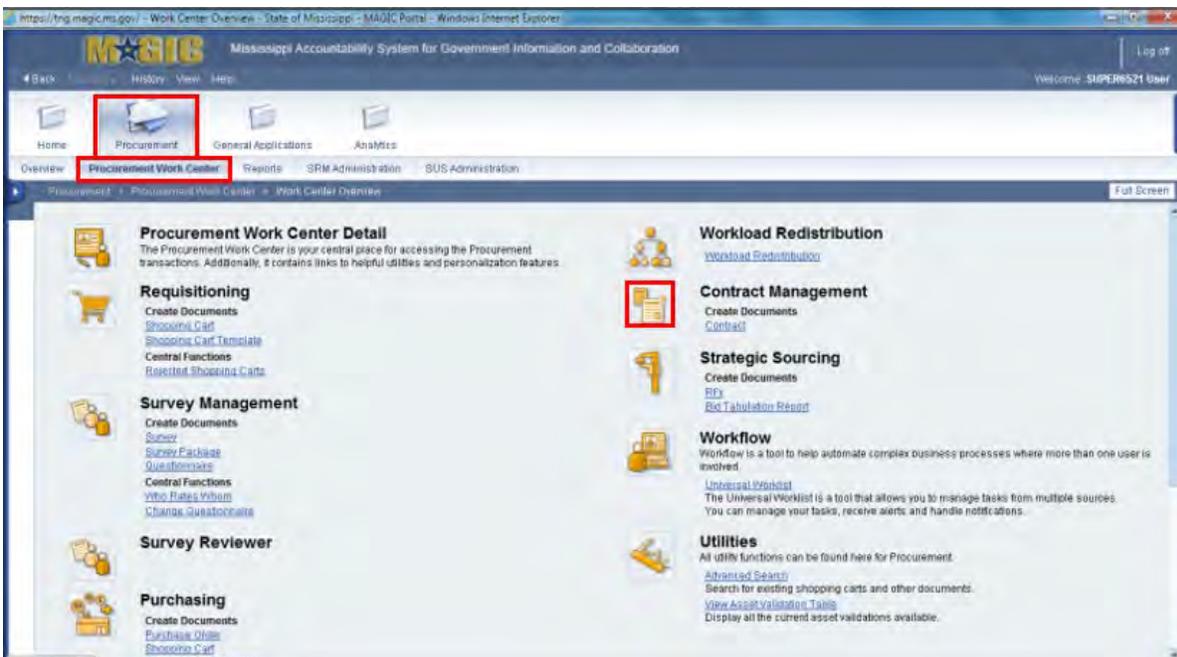
Description: This Job Aid provides instructions on setting up Contract Alerts.

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.

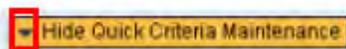
Steps

1. Start the transaction using the menu path:

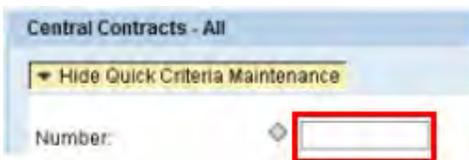
SRM > Procurement > Procurement Work Center > Contract Management



2. Click on the **Show Quick Criteria Maintenance** toggle or use the scroll bar to **scroll down** to view the results.



3. Enter the **Contract Number** in the Number field.



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:
Apply Clear
View: [Standard View] Create Central Contract Copy

6. To select the desired contract, click on the **gray box** in the first column of the line.

Central Contract Number	Central Contract Name	Status
<input type="checkbox"/> 8490000051	1130-14-C-EMEC-00009	Released

7. Click on the **Edit** button.

Create Central Contract Copy Display **Edit**

How to set an alert for a Valid to Date (Contract End Date)

8. Click on the **Header** tab.

Overview **Header** Items

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 Day(s)**

How 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.

Currency, Values and Pricing

Currency: *

Display Currency/ Exchange Rate Date:

Target Value: USD

Alert Release Value: %

Release Value: USD

View a Contract Alert in the Universal Worklist

14. When a Contract Alert is triggered based on the criteria you set, it will display in the Universal Worklist like the following example:

UWL Screen

Home > Universal Worklist > Universal Worklist

Tasks (35 / 35) **Alerts (2 / 4)** Notifications SAPoffice Mails Tracking

Show: New and in Progress Alerts (2 / 4) | Select a Subview... | All |

Priority	Subject	Sent Date	Recipients	Category
	Please check Contract 8200027769. Contract expires in 42 days	Sep 24, 2015 4:08 PM	Vijay Saadhu	Alerts for Purchasing Contract
	Please check Contract 8200027771. Contract expires in 42 days	Sep 24, 2015 4:08 PM	Vijay Saadhu	Alerts for Purchasing Contract
	Please check Contract 8800000929. Contract expired	Sep 24, 2015 10:09 AM	Vijay Saadhu	Alerts for Purchasing Contract
	Please check Contract 8800000929. Contract expired	Sep 24, 2015 9:45 AM	Vijay Saadhu	Alerts for Purchasing Contract

Content of the UWL alert:

Please check Contract 8200027769: Contract expires in 42 days

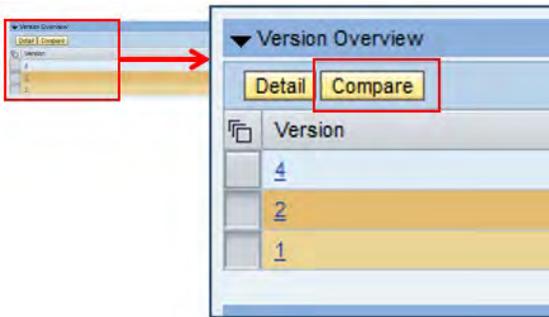
Priority:		Sent Date:	Sep 24, 2015 4:08 PM
Recipients:	Vijay Saadhu	Status:	New
Expiry Date:	Sep 30, 2015 10:08 PM	Category:	Alerts for Purchasing Contract
Due Date:	Sep 30, 2015		
Description:	Please check Contract 8200027769. Contract expires in 42 days		

https://dev.magic.ms.gov:443/portal/?NavigationTarget=ORR_IBOSystemAlias=SA

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.



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

Version Comparison		
Comparison Between Version 2 and Version 1		
Header - Item/Attribute	Version 2	Version 1
▼ Header		
▼ Basic Data		
▪ New Serial No.	X	
▪ Type of No. Scheme	SPIN1	PIIN
▪ Smart Number	1130-13-C-SWCT-00004-V001	1130-13-C-SWCT-00004
▪ Distribution Flag	X	
▪ 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