



# How to Process a P1 in MAGIC

These instructions are developed to provide you step-by-step instructions on how to create P-1 requests.

Select the desired option from the contents below for the instructions.

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## Document types to process P-1 Purchase Requests (State Agencies)

### **OREQ- Oversight Request**

- Multiple awards from a single bid solicitation (RFx)
- Trade-in of Equipment with Purchase
- Exemption from procuring state contract items

### **SOLC- Sole Source**

- All Sole Source awards

### **CNTR- Purchasing General**

- Single award from a bid solicitation (RFx)
- Copier/mailing equipment rental agreements

### **EMER- Emergency**

- Emergency purchases greater than \$50,000

### **SOLE (PO) - Oversight Approval**

- Open Purchase Orders

### **EMEC (PO) – Emergency PO**

- Emergency purchases less than \$50,000

## Document types to process P-1 Purchase Requests (Universities)

### **OREQ- Oversight Approval Request**

- Multiple awards from a single bid solicitation
- Trade-in of Equipment with Purchase
- Exemption from procuring state contract items

### **SOLC- Sole Source**

- All Sole Source awards

### **CNTR- Purchasing General**

- Single award from a bid solicitation
- Copier/mailing equipment rental agreements

### **EMER- Emergency**

- All Emergency purchases

Please use following link locate required attachments for all P-1 request types:

<http://www.dfa.state.ms.us/Purchasing/PurchasingTools/ElectronicP-1Process.html>

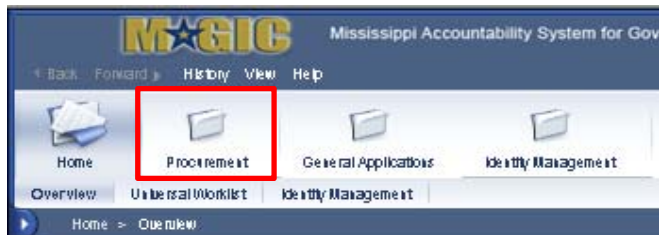
## Create a P-1 Contract from Awarded RFX Response (State Agencies Only)

This process will be used if a State agency has created a competitive bid within MAGIC. After all bid responses have been received electronically and/or the Buyer has entered all Surrogate bids (if accepted, per the specifications), a P-1 contract will be created from the awarded bid response that will route to the Office of Purchasing, Travel, and Fleet Management (OPTFM) for approval.

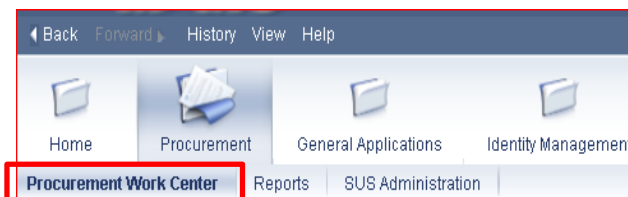
1. Using your User-ID and Password Log into MAGIC:  
<https://portal.magic.ms.gov>



2. Select **Procurement** icon from the home page options.



3. Select **Procurement Work Center**



4. Select the icon next to Strategic Sourcing

**Strategic Sourcing**  
 Create Documents  
[RF's](#)  
[Bid Tabulation Report](#)

**Contract Management**  
 Create Documents  
[Contract](#)  
[Contract Download Report](#)

**Workflow**  
 Workflow is a tool to help automate complex business processes where  
[Universal Worklist](#)  
 The Universal Worklist is a tool that allows you to manage tasks from r  
 alerts and handle notifications.

**Utilities**  
 All utility functions can be found here for Procurement.  
[Advanced Search](#)  
 Search for existing shopping carts and other documents.  
[View Asset Validation Table](#)  
 Display all the current asset validations available.

5. Enter the RFX number into the “Number” field and click “Apply”. Click on the applicable RFX number to open and display.

RFXs - All  
 Hide Quick Criteria Maintenance

Product Category:

Processed Since:

Submission Deadline:

Location:  To

My RFX:

Name of RFX:

**Number:**  To

Purchase Group:

Purchasing Organization:

Item Product:

Status:

RFX Type:

Supplier:

View: [Standard View]

RFX Number	Item Number	Location	RFX Name	Type	Status	RFX Category	Purcha
<b>3160000110</b>			1130-15-R-IFBD-00017	IFBD	Published		State o

6. Click Responses and Awards

**Display RFX : 3160000110**

RFX Number 3160000110 Smart Number 1130-15-R-IFBD-00017 Type Invitation for Bid Status Published Created On 10/13/2014 12:55:19 Created By Robert Fulcher Time Zone CST Number of Suppliers 4 Number of Items 3

Version Number 2 Version Type Active Version External Version Number 1

**RFX Information** Bidders Items Notes and Attachments Conditions Weights and Scores Approval Tracking

RFX Parameters Questions Notes and Attachments Conditions Table Extension Payment Synopsis User-Specified Status

**Identification**  
 Smart Number: 1130-15-R-IFBD-00017  
 Smart Number is External  
 RFX Number: 3160000110  
 RFX Type: Invitation for Bid  
 Product Category:  
 Publication Type: Public RFX

**Organization**  
 Purchasing Organization: State of Mississippi - Purchasing  
 Purchasing Group: 1130 OVSIGHT OPTFM [Show Members](#)

**Dates**  
 Start Date: 10/13/2014 01:08:00 pm  
 Surrogate Bid Entry Deadline: 10/23/2014 12:00:00 am  
 Opening Date: 10/13/2014 01:20:00 pm

**Event Parameters**  
 Currency: USD  
 Target Value: 0.00 USD  
 Detailed Price Information: Price with Conditions  
 Follow-On Document: Contract  
 Bidder Can Change RFX Responses:   
 Allow Multiple RFX Responses for Each Company:   
 Display Weighting to Bidders:   
 Document Builder Doc Type: ZRFX\_AMEND  
 Confidential Document:   
 Bidder Submission Deadline Date: 10/13/2014  
 Bidder Submission Deadline Time: 01:20:00 pm

7. Select and open the response that will be awarded.

**Responses and Awards**

9 Days 10:32:20 | Smart Number 1130-15-R-IFBD-00017 | Type Invitation for Bid | Status Published | Number of Suppliers 4 | RfX Number 3160000110

Close | Print Preview | Refresh | Create Follow-on RfX | Export | Questions & Answers (0) | Synopsis

Response Activity | Response Comparison | Surrogate Bidding

Response Number	Response Status	Company Name	Bidder Name	Intent	Response Version	Last Changed	Response on Behalf
6000000070	Submitted	MS SCHOOL PUBLIC RELATIONS ASN	MS SCHOOL PUBLIC RELATIONS ASN MS SCHOOL PUBLIC RELATIONS ASN	<input type="checkbox"/>		10/13/2014	Activated
6000000071	Submitted	ARCADIA PUBLISHING	ARCADIA PUBLISHING ARCADIA PUBLISHING	<input type="checkbox"/>		10/13/2014	Activated
6000000072	Submitted	INTELLTRACK INC	INTELLTRACK INC INTELLTRACK INC	<input type="checkbox"/>		10/13/2014	Activated

8. Click within the checkbox for the items that will be awarded;

**Edit Document: 6000000070**

RfX Response Number 6000000070 | RfX Name 1130-15-R-IFBD-00017 | Status Submitted | Supplier Name MS SCHOOL PUBLIC RELATIONS ASN | Target Value 0.00 USD | RfX Number 3160000110

Close | Read Only | Print Preview | Check | Intent to Award | Accept | Reject | Return | Save | Export

RfX Information | **Items** | Notes and Attachments | Conditions | Approval | Tracking

Item Overview

Line Number	Internal Item Number	Description	Accept	Item Type	Product ID	Product Category	Product Category Description	Required Quantity	Submitted Quantity	Unit	Price	Currency	Price Per	Total Value
1		School Agendas	<input checked="" type="checkbox"/>	Material	78502	SchoolEquipAgendasPI		500	500	EA	16.00	USD	1	8,000.00
2		School Blackboards	<input checked="" type="checkbox"/>	Material	78515	SchoolEquipBlackboard		750	750	EA	25.00	USD	1	18,750.00
3		School Books	<input checked="" type="checkbox"/>	Material	78520	SchoolEquipBooksClas		1,000	1,000	EA	50.00	USD	1	50,000.00

9. Click the "Accept" button

Note: Please navigate to the Approval tab. Agency approvals may be required.

**Edit Document: 6000000070**

RfX Response Number 6000000070 | RfX Name 1130-15-R-IFBD-00017 | Status Submitted | Supplier Name MS SCHOOL PUBLIC RELATIONS ASN | Target Value 0.00 USD | RfX Number 3160000110

Close | Read Only | Print Preview | Check | Intent to Award | **Accept** | Reject | Return | Save | Export

RfX Information | **Items** | Notes and Attachments | Conditions | Approval | Tracking

Item Overview

Line Number	Internal Item Number	Description	Accept	Item Type	Product ID	Product Category	Product Category Description	Required Quantity	Submitted Quantity	Unit	Price	Currency	Price Per	Total Value
1		School Agendas	<input checked="" type="checkbox"/>	Material	78502	SchoolEquipAgendasPI		500	500	EA	16.00	USD	1	8,000.00
2		School Blackboards	<input checked="" type="checkbox"/>	Material	78515	SchoolEquipBlackboard		750	750	EA	25.00	USD	1	18,750.00
3		School Books	<input checked="" type="checkbox"/>	Material	78520	SchoolEquipBooksClas		1,000	1,000	EA	50.00	USD	1	50,000.00

10. After all agency approvals have been applied, the status will reflect a status of "Accepted".

a. Once accepted, click "Create Contract."

**Display RfX Response 6000000070**

RfX Response Number 6000000070 | RfX Name 1130-15-R-IFBD-00017 | **Status Accepted** | Supplier Name MS SCHOOL PUBLIC RELATIONS ASN | Target Value 0.00 USD | RfX Number 3160000110

Close | Print Preview | Refresh | Intent to Award | Export | **Create Contract** | Publish To Catalog | Undo Accept | Synopsis

RfX Information | **Items** | Notes and Attachments | Conditions | Approval | Tracking

Item Overview

Line Number	Internal Item Number	Description	Accept	Item Type	Product ID	Product Category	Product Category Description	Required Quantity	Submitted Quantity	Unit	Price	Currency	Price Per	Total Value
1		School Agendas	<input checked="" type="checkbox"/>	Material	78502	SchoolEquipAgendasPI		500	500	EA	16.00	USD	1	8,000.00
2		School Blackboards	<input checked="" type="checkbox"/>	Material	78515	SchoolEquipBlackboard		750	750	EA	25.00	USD	1	18,750.00
3		School Books	<input checked="" type="checkbox"/>	Material	78520	SchoolEquipBooksClas		1,000	1,000	EA	50.00	USD	1	50,000.00

- Select contract type “CNTR” unless the contract is a Multi Award. If a multiple vendors are being awarded, select contract type “OREQ”, and then click “Create Contract”.

**Display RFX Response 600002160**

RFX Response Number 600002160 RFX Name 1130-16-R-NBID-00011 Status Accepted Supplier Name SAMSUNG ELECTRONICS AMERICA, INC. Target Value 0.00 USD

Close Print Preview Refresh Intent to Award Export Create Contract Publish To Catalog Synopsis

Rfx Information Items Notes and Attachments Conditions Approval Tracking

General Data Conditions Notes and Attachments Questions Payment Synopsis

Basic Data

Bidder Contact Information

Supplier Name: SAMSUNG ELECTRONICS AMERICA, INC.  
 Contact Person Name: SAMSUNG ELECTRONICS AMERICA, INC. SAMSUNG ELECTRONICS AMERICA, INC.  
 E-Mail: WCROWE@SEA.SAMSUNG.COM  
 Fax: 859-402-9266  
 Phone: 859-685-7806

Event Parameters

Process Type: QUOT  
 Validity Period: -  
 Currency: United States Dollar  
 Detailed Price Information: Price with Conditions  
 Follow-On Document: Contract  
 Target Value of RFX in Original Currency: 0.00 USD  
 Target Value of RFX in Selected Currency: 0.00 USD  
 Target Value of RFX Response: 0.00 USD

**Create Contract**

Select from the following transaction types:

Description	Transaction Type	Partner Grouping Schema
BRICKS – Lease	BRLE	
Purchasing (General)	CNTR	
Emergency Contract	EMEC	
Oversight Request	OREQ	
Cntr/Oversight Appr	SOLC	

Create Contract Cancel

- The following message will appear, “Contract 88XXXXXX was not created completely”. After the message displays, select the “Close” button.

Note: Use the scroll bar to the far right and navigate to the last message.

**Display RFX Response 600000070**

RFX Response Number 600000070 RFX Name 1130-15-R-IFBD-00017 Status Accepted Supplier Name MS SCHOOL PUBLIC RELATIONS ASN Target Value 0 00 USD RFX Number 3160000110

Please attach the necessary justification or contract that needs to be posted to transparency under the Notes and Attachment tab  
 Please attach an appropriate internal justification for this contract  
 Please enter Material/Service type in additional information  
 Enter Short Contract Description text under Notes and Attachment  
 Contract 8800002750 was not created completely [Display Help](#)

Close Print Preview Refresh Intent to Award Export Create Contract Publish To Catalog Undo Accept Synopsis

Rfx Information Items Notes and Attachments Conditions Approval Tracking

Item Overview

Details Add New Copy Paste Delete Calculate Value

Line Number	Internal Item Number	Description	Accept	Item Type	Product ID	Product Category	Product Category Description	Required Quantity	Submitted Quantity	Unit	Price	Currency	Price Per	Total Value
1		School Agendas	✓	Material	78502	SchoolEquipAgendasPI		500	500	EA	16.00	USD	1	8,000.00
2		School Blackboards	✓	Material	78515	SchoolEquipBlackboard		750	750	EA	25.00	USD	1	18,750.00
3		School Books	✓	Material	78520	SchoolEquipBooksClas		1,000	1,000	EA	50.00	USD	1	50,000.00

- Navigate to the RFX and select the “Tracking” tab to find the contract that was created. Click on the Contract Number to display the contract.

**Display RFx : 316000110**

RFx Number 316000110 Smart Number 1130-15-R-FBD-00017 Type Invitation for Bid Status Published Created On 10/13/2014 12:55:19 Created By Robert Fulcher Time Zone CST Number of Suppliers 1 Number of Items 3  
Version Number 2 Version Type Active Version External Version Number 1

[Edit] [Close] [Refresh] [Copy] [Check] [Responses and Awards] [Create Follow-on RFx] [Convert to Auction] [Export] [Print Preview] [Questions and Answers ( 0 )]

RFx Information | Bidders | Items | Notes and Attachments | Conditions | Weights and Scores | Approval | **Tracking**

▼ History

View: United States Dollar

Document	Name	Document Number	Back-End Document Number	Status	Date
RFx	1130-15-R-FBD-00017	316000110		Published	10/13/2014
RFx Response	1130-15-R-FBD-00017	6000000070		Accepted	10/13/2014
RFx Response	1130-15-R-FBD-00017	6000000071		Submitted	10/13/2014
RFx Response	1130-15-R-FBD-00017	6000000072		Submitted	10/13/2014
Central Contract	1130-15-C-SOLC-00017	880002750		Saved	10/13/2014

14. Click the “Edit” button to begin entering data into the contract.

**Display Cntr/Oversight Appr 880002750**

Contract Number 880002750 Smart Number 1130-15-C-SOLC-00017 Contract Type Cntr/Oversight Appr Status Saved Supplier 3100012252 MS SCHOOL PUBLIC RELATIONS ASN Contract Owner 10215 Robert Fulcher

[Close] [Release] [Edit] [Copy] [Check] [Refresh] [Negotiate] [Send E-Mail] [Print Preview] [Export]

Overview | Header | Items | Notes and Attachments | Conditions | Authorization | Approval | Tracking

**General Header Data**

Contract Number: 880002750 Contract Name: 1130-15-C-SOLC-00017  
 Supplier: 3100012252 MS SCHOOL PUBLIC RELATIONS ASN Contract Owner: 10215 Robert Fulcher  
 Valid From / To: 10/13/2014 - 12/31/9999 Target Value/ Currency: 0.00 USD  
 Purchasing Organization: State of Mississippi - Purchasing Release Value: 0.00 USD  
 Purchasing Group: 1130 OVSIGHT OPTFM Basic Contract:

▼ Items

Line Number	Item Category	Option Type	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Price Per	Price Unit	Reference Item Number
1.	Normal		1		School Agendas	78520	500	EA		8,000.00	16.00	USD	1	EA	0
2.	Normal		2		School Blackboards	78515	750	EA		18,750.00	25.00	USD	1	EA	0
3.	Normal		3		School Books	78520	1,000	EA		50,000.00	50.00	USD	1	EA	0

(1) Set the **Valid From / To** contract effective dates by clicking the calendar icon to open and display the calendar to select the desired dates.

Overview | Header | Items | Notes and Attachments | Conditions

**General Header Data**

Contract Number: 880002750  
 Supplier: 3100012252 MS SCHOOL PUBLIC RELATIONS ASN  
 Valid From / To: 10/13/2014 10/13/2015  
 Purchasing Organization: State of Mississippi - Purchasing

(2) In the window displayed, click the date to be populated.

Valid From / To: 10/13/2014 - 10/13/2015

Purchasing Organization: State of Mississippi - Purchasing

Purchasing Group: 1130 OVSIGHT OPTFM

▼ Items

Line Number	Item Category	Option Type	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Price Per	Price Unit	Reference Item Number
40			29		30	1	2	3	4	5					
41			6		7	8	9	10	11	12					
42			13		14	15	16	17	18	19					
43			20		21	22	23	24	25	26					
44			27		28	29	30	31	1	2					

(3) Enter the **Target Value** of request. **Total EXPECTED spend throughout contract life cycle**

**Change Cntr/Oversight Appr 8800002750**

Contract Number 8800002750    Smart Number 1130-15-C-SOLC-00017    Contract Type Cntr/Oversight Appr    Status Saved    Supplier 3100012252 MS

Close | Read Only | Release | Save | Check | Send E-Mail | Print Preview | Export | Import | Delete | Park

Overview | Header | Items | Notes and Attachments | Conditions | Authorization | Approval | Tracking

**General Header Data**

Contract Number: 8800002750    Contract Name: 1130-15-C-SOLC-00017

Supplier: \* 3100012252 MS SCHOOL PUBLIC RELATIONS ASN    Contract Owner: 10215 Robert Fulcher

Valid From / To: \* 10/13/2014 - 10/13/2015    Target Value/ Currency: 76,750.00 USD

Purchasing Organization: \* State of Mississippi - Purchasing    Release Value: 0.00 USD

Purchasing Group: \* 1130 OVSIGHT OPTFM    Basic Contract:

15. All line item data will replicate from the awarded RFx response. The fields include but not limited to:

- a. Description
- b. Product Category
- c. Quantity
- d. Unit of Measure
- e. Target Value
- f. Price

Overview | Header | Items | Notes and Attachments | Conditions | Authorization | Approval | Tracking

**General Header Data**

Contract Number: 8800002750    Contract Name: 1130-15-C-SOLC-00019

Supplier: \* 3100012252 MS SCHOOL PUBLIC RELATIONS ASN    Contract Owner: 10215 Robert Fulcher

Valid From / To: \* 10/13/2014 - 10/13/2015    Target Value/ Currency: 76,750.00 USD

Purchasing Organization: \* State of Mississippi - Purchasing    Release Value: 0.00 USD

Purchasing Group: \* 1130 OVSIGHT OPTFM    Basic Contract:

▼ Items

Details | Select | Add Item | Exercise Option | Copy | Paste | Duplicate | Delete | Assign Distribution

Line Number	Item Category	Option Type	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price
1	Normal		1		School Agendas	78500	500		EA	8,000.00	16.00
2	Normal		2		School Blackboards	78515	75		EA	18,750.00	25.00
3	Normal		3		School Books	78520	1,000		EA	50,000.00	50.00
4	Normal		4		School Agendas	78502	500		EA	8,000.00	16.00



16. If the **Target Value** for a given line is not known, set the **Target Value** on the line to the **Target Value** under the **General Header Data** section of the **Overview** tab.

a. If the **Quantity** is unknown, then ensure that the **Target Quantity** is set to zero

Line Number	Item Category	Option Type	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price
1	Normal		1		School, Agendas	78502	0	EA		76,750.00	16.00
2	Normal		2		School Blackboards	78515	0	EA		76,750.00	25.00
3	Normal		3		School Books	78520	0	EA		76,750.00	50.00
4	Normal		4		School, Agendas	78502	0	EA		76,750.00	16.00

### Step Three: Header – Additional Information

(1) Click the **Header**, then **Additional Information Subtab** tab.

(2) Enter the following information on the Additional Information tab. Fields with \* are required fields.

a) **Request Type:** Use the drop down and select the appropriate value.

- b) **Contract Category:** Use the drop down and select the value “OPTFM P-1”.
- c) **Contract Performance Location:** Use the dropdown and select the applicable county where the item/service is to be utilized (If there is more than one, select “Multiple Locations” or “Statewide” or “Other”).
- d) **Material/Service Type:** Use the dropdown and select “Commodity (Non-IT)”.
- e) **Reference Contract Number:** Use this field to record an internal agency reference number if needed, this field can be queried upon via advanced search in SRM

The screenshot shows the 'Additional Information' tab in the SRM system. The 'General Contract Attributes' section is highlighted with a red box. The fields in this section are:

- Reference Contract Number: [Empty]
- Request Type: \* COMPETITIVE RFX
- Contract Category: \* OPTFM-P1
- Material/Service Type: \* COMMODITIES - (NON-IT)
- P-Card:  Yes  No
- Contract Performance Location: \* AMITE
- Vendor Congressional District: [Empty]

The 'Agency / Board Approval' section contains the following fields:

- Agency / Board Approval: [Empty]
- Agency / Board Approval Date: [Empty]
- Fed Grant Award Number: \* 123456A
- Fed Aid Number: \* 123456A
- CFDA Number: \* 10.406 [A1B2C3]
- Stimulus Funded: \*  Yes  No
- Federal Funds Indicator:  Yes  No
- State Fund %: \* 90.00
- Federal Funds %: \* 5.00
- Other Amount %: \* 5.00
- Federal Amount: \* 2,500.00
- State Amount: \* 45,000.00
- Other Amount: \* 2,500.00
- Contract Total Value: \* 50,000.00

(3) Enter the following funding source information. These fields are required for Transparency reporting.

- a) **Stimulus Funded:** Select the appropriate value.
- b) **Federal Funds Indicator:** Select “Yes” if federal funds are used to procure the commodity. The system will default to “No.”

If “NO”, the contract does not require a Federal Fund % or Federal Amount (fields will be grayed out). Therefore, the State Fund% and Other Amount % must total to 100%. State and Other Amount fields must equal to the Contract Total Value.

Stimulus Funded:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Federal Funds Indicator:	<input type="radio"/> Yes <input checked="" type="radio"/> No
State Fund %: *	<input type="text" value="90.00"/>
Federal Funds %:	<input type="text" value="0.00"/>
Other Amount %: *	<input type="text" value="10.00"/>
Federal Amount	<input type="text" value="0.00"/>
State Amount *	<input type="text" value="45,000.00"/>
Other Amount *	<input type="text" value="5,000.00"/>
Contract Total Value: *	<input type="text" value="50,000.00"/>

If Federal Funds Indicator is “YES.”

- A Federal Funds % or Federal Amount must be entered.
- Fed Grant Award Number, Fed Aid Number, and CFDA Number will also be required.
- Federal, State, and/or Other % or Amount must total 100% and amounts must equal Contract Total Value.

Fed Grant Award Number: *	<input type="text" value="123456A"/>
Fed Aid Number: *	<input type="text" value="123456A"/>
CFDA Number: *	<input type="text" value="10.567"/> <input type="text" value="123"/>
Stimulus Funded: *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Federal Funds Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No
State Fund %: *	<input type="text" value="90.00"/>
Federal Funds %: *	<input type="text" value="5.00"/>
Other Amount %: *	<input type="text" value="5.00"/>
Federal Amount:	<input type="text" value="2,500.00"/>
State Amount *	<input type="text" value="45,000.00"/>
Other Amount *	<input type="text" value="2,500.00"/>
Contract Total Value: *	<input type="text" value="50,000.00"/>

Must Equal 100%

Must add up to Contract Total Value

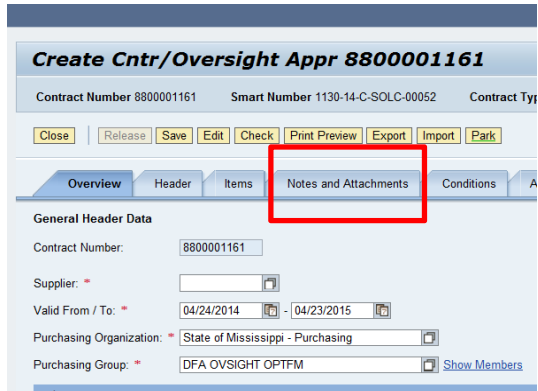
(4) Enter the option **Green Attributes** information.

- Recycled Goods:** Use the dropdown and select the applicable value (Recycled, No, Partial). If “Partial” is selected, the Recycled Good Percentage must be entered.
- Energy Efficient:** Select the appropriate value.
- Green Technology or Products:** Select the appropriate value.
- Manufactured in Mississippi:** Select the appropriate value.
- Carbon Footprint:** Free-text field for you to enter the appropriate value.

<b>Green Attributes</b>	
Recycled Goods:	<input type="text" value=""/> <input type="button" value="v"/>
Recycled Goods Percentage:	<input type="text" value=""/>
Energy Efficiency:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Green Technology or Products:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Manufactured in Mississippi:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Carbon Footprint:	<input type="text" value=""/>

## Step Four: Notes and Attachments

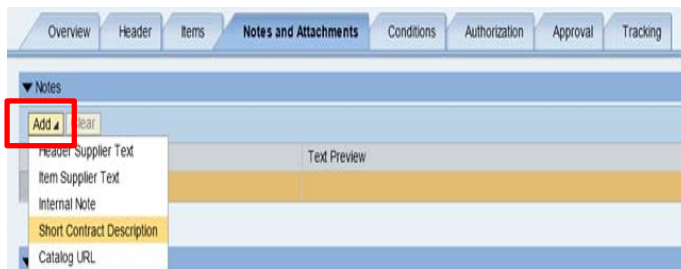
(1) Click the main **Notes and Attachments** tab.



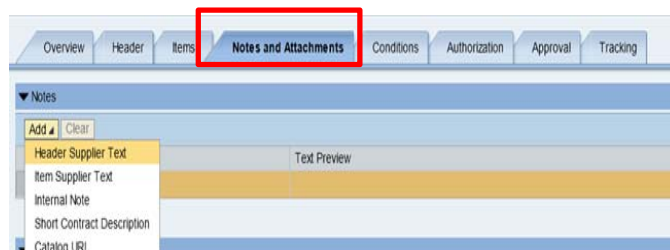
(2) Click **Add** then **Short Contract Description**. The description is a required field and can be up to 60 characters in length. Enter a brief description of the contract.

a. The description must begin with one of the following phrases:

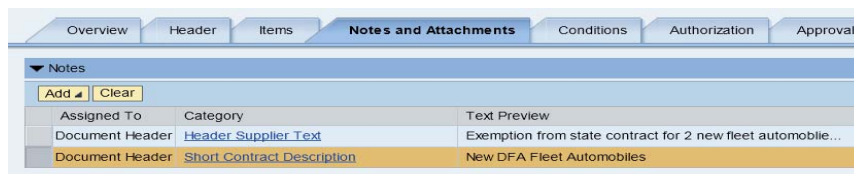
- Bid Solicitation for....
- Sole source request for...
- Research request for...
- Exemption from state contract for...
- Open purchase for...
- Trade-In of Equipment with Purchase



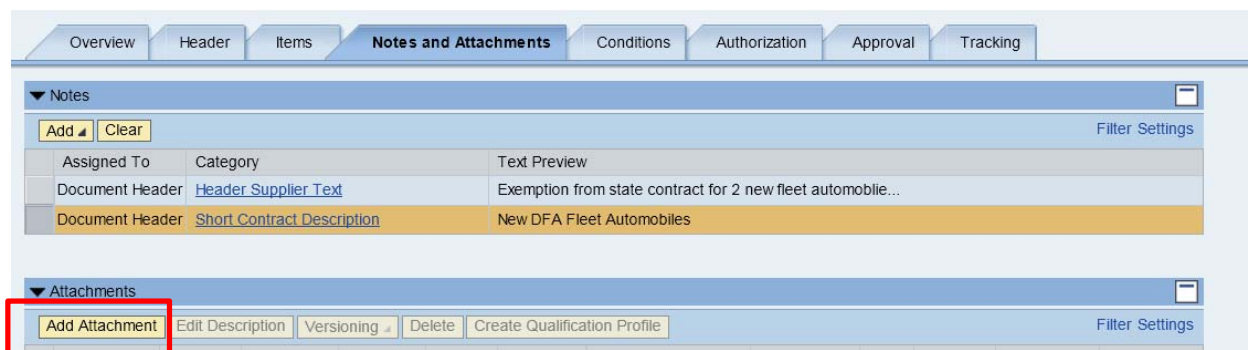
(3) Click **Add** then **Header Supplier Text**. Enter a detailed description of the items requested.



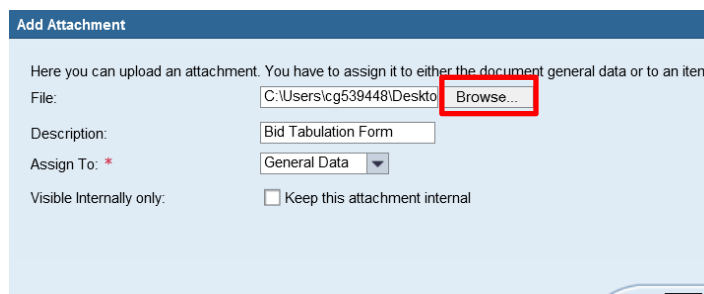
- (4) Internal Note and Item Supplier Text are optional fields and all notes will be displayed as seen below.



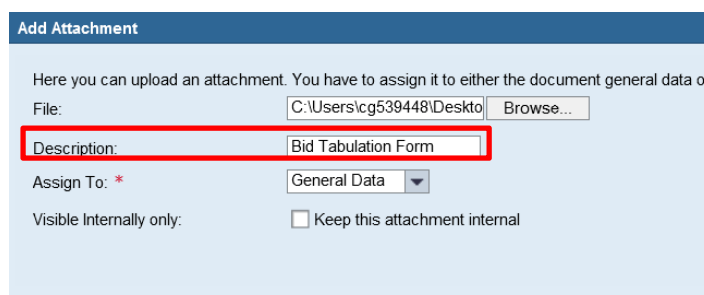
- (5) Select the **Add Attachment** button to upload all required documents needed for approval.



- (6) A small window will display; select the **Browse...** button to select a document from your computer.



- (7) Enter a description of the document to be added.



- (8) Documents must be marked internal or external and must be in compliance with MS Code 27-104-155. NOTE, if the box is **unchecked**, it will be visible to the public for Transparency requirement.
- a. Continue to select the **Add Attachment** button to upload all remaining documents such as the Contract, Bid Specs, Justification Letter and Bid Tabulation, advertisement, etc.

Visible Internally only:  Keep this attachment internal

- (9) Select the **OK** button to return the file to the Notes and Attachment display.

**Add Attachment**

Here you can upload an attachment. You have to assign it to either the document general data or to an item

File: C:\Users\lcg539448\Desktop Browse...

Description: Bid Tabulation Form

Assign To: \* General Data

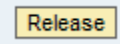
Visible Internally only:  Keep this attachment internal

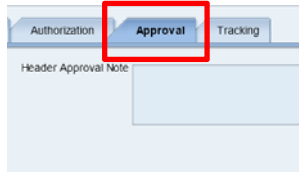
OK Cancel

- (10) The system will display the added document to the table below

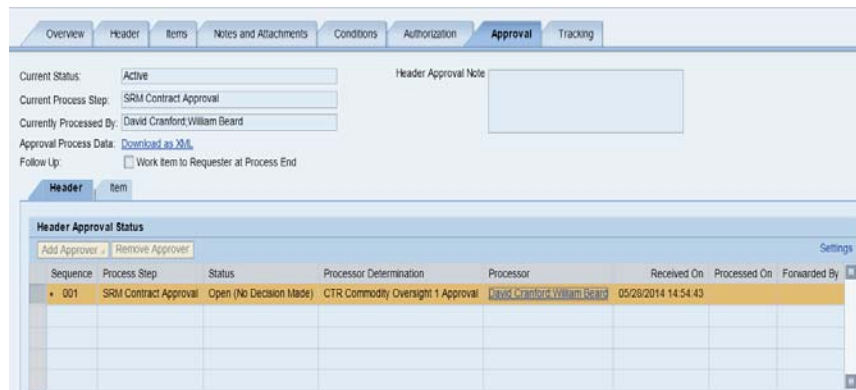
Assigned To	Category	Description	File Name	Version	Processor	Visible Internally
Document Header	Standard Attachment	Bid Tabulation Form	IN077490_Transparency Website Issue.msg	1		<input type="checkbox"/>

## Step Five: Release for Approval

- (1) Once all required information has been entered, select **Release**  to send the contract through approval.
- (2) Approvals can be displayed by selecting the **Approval** tab.



- (3) The Commodity Oversight Approvers will approve P-1 requests.



The screenshot shows a software interface with tabs: 'Overview', 'Header', 'Items', 'Notes and Attachments', 'Conditions', 'Authorization', 'Approval', and 'Tracking'. The 'Approval' tab is selected. The interface displays the following information:

Current Status: Active  
Current Process Step: SRM Contract Approval  
Currently Processed By: David Cranford, William Beard  
Approval Process Data: [Download as XML](#)  
Follow Up:  Work Item to Requester at Process End

Header Approval Note

Header Approval Status

Sequence	Process Step	Status	Processor Determination	Processor	Received On	Processed On	Forwarded By
001	SRM Contract Approval	Open (No Decision Made)	CTR Commodity Oversight 1 Approval	David Cranford, William Beard	05/26/2014 14:54:43		

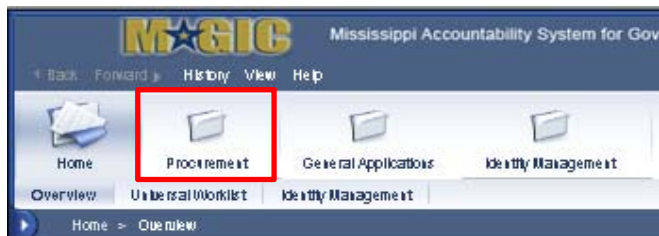
## How to Create a Manual P-1 Contract Request (incl. Trade-in)

This process should be used by Universities or Agencies that **do not** create their RFX's within the MAGIC system.

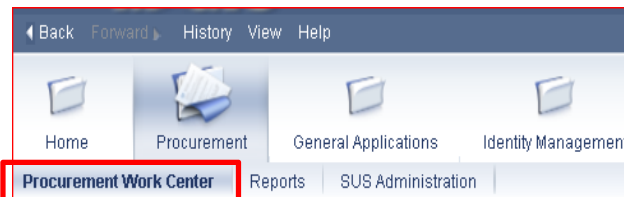
1. Using your User-ID and Password Log into MAGIC:  
<https://portal.magic.ms.gov>



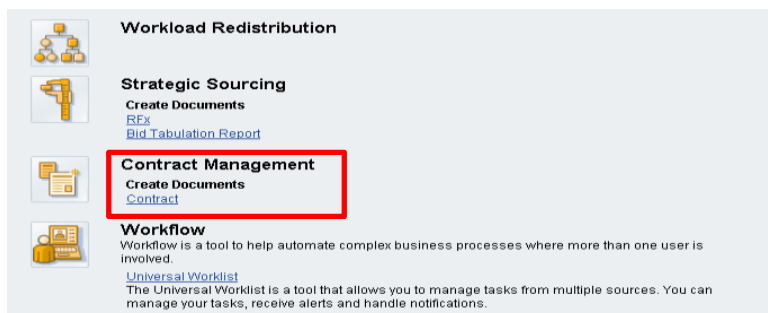
2. Select **Procurement** icon from the home page options.



3. Select **Procurement Work Center**



4. Select **Contract** under Contract Management





## Step One: Contract Type

Select the applicable contract type, then click “Start”.

**Select Contract Type**

Select the type of contract you want to create

Contract Type	Contract Type Description	Partner Grouping Schema
BRLE	BRICKS – Lease	
CNTR	Purchasing (General)	
EMEC	Emergency Contract	
OREQ	Oversight Request	
SOLC	Cntr/Oversight Appr	
SWCT	Statewide Contract	ZCTR_DISTRIBUTOR CTR_Distributor_PGS

Enter External Number:

## Step Two: Overview

### Supplier Information

Before starting to create the P-1 Request, check to see if the supplier has been set up in MAGIC.

Use the search icon with the Supplier field and search for the supplier to be certain it is there. If the supplier is still not found, it is possible that the vendor is not registered yet within MAGIC.

The supplier should be contacted and asked to complete the online supplier registration process or the Buyer can register on behalf of the supplier.

[https://sus.magic.ms.gov/sap/bc/webdynpro/sapsrm/wda\\_e\\_suco\\_sreg?sap-client=100#](https://sus.magic.ms.gov/sap/bc/webdynpro/sapsrm/wda_e_suco_sreg?sap-client=100#)

**Create Cntr/Oversight Appr 880001161**

Contract Number: 880001161 | Smart Number: 1130-14-C-SOLC-0052 | Contract Type: Cntr/Oversight Appr | Status: In Process

Overview | Header | Items | Notes and Attachments | Conditions | Authorization | Approval | Tracking

Contract Number: 880001161 | Contract Name: 1130-14-C-SOLC-0052  
Contract Owner: 19463 | Robert Fulcher  
Valid From / To: 04/24/2014 - 04/23/2015  
Purchasing Organization: State of Mississippi - Purchasing  
Purchasing Group: DFA OVSIGHT OPTFM  
Target Value / Currency: 0.00 USD  
Release Value: 0.00 USD  
Basic Contract:

▼ Items

Line Number	Item Category	Option Type	Item Number	Product ID	Product Category	Description	Target Quantity	Option Status	Unit	Target Value	Currency	Price Per	Price Unit	Reference Item Number	Distribution	Block Local Sourcing
Normal							0.00			0.00	USD			000000000		

1. Search for a Supplier by clicking the search icon in the Supplier field



**Create Cntr/Oversight Appr 8800001161**

Contract Number 8800001161 Smart Number 1130-14-C-SOLC-00052 Contract Ty

**Overview** Header Items Notes and Attachments Conditions A

**General Header Data**

Contract Number: 8800001161

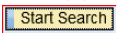
Supplier: \*

Valid From / To: \* 04/24/2014 - 04/23/2015

Purchasing Organization: \* State of Mississippi - Purchasing

Purchasing Group: \* DFA OVSIIGHT OPTFM

2. A Supplier search window will open; enter the vendor's name in Last Name, First Name, or both and click



**Supplier: All Values**

Business partner:

Search term 1:

Search term 2:

Name 1/last name:

Name 2/First name:

E-Mail Address:

DUNS:

Creditor:

Logical System:

Industry sector:

PCard co.:

Purch. Organization:

Purch. Org. ID:

Country Key:

Region:

Postal Code:

City:

Street:

Building Code:

Restrict Number of Value List Entries To

3. The search results will appear. Click the cell to highlight the supplier and click



BusPartner	Name	Name 2	Country	Region	Postal Code	City	Street
3100000016	DREAM INC		US	MS	39200	JACKSON	310 AIRPOR

More Search Helps: Supplier

4. The system will populate the supplier in the field on the Overview tab.

**Overview** Header Items Notes and Attachments Conditions

**General Header Data**


Contract Number: 8800001180

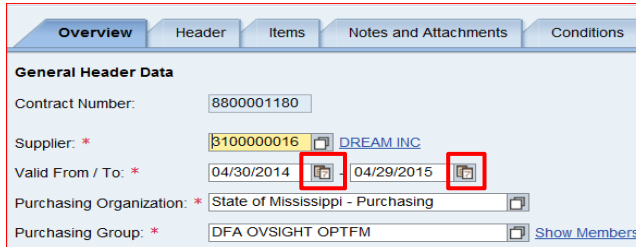
Supplier: \*

Valid From / To: \* 04/30/2014 - 04/29/2015

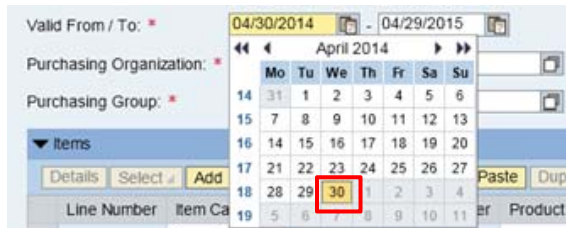
Purchasing Organization: \* State of Mississippi - Purchasing

Purchasing Group: \* DFA OVSIIGHT OPTFM

5. Set the **Valid From / To** contract effective dates by clicking the calendar icon open and display the calendar to select the desired dates. 



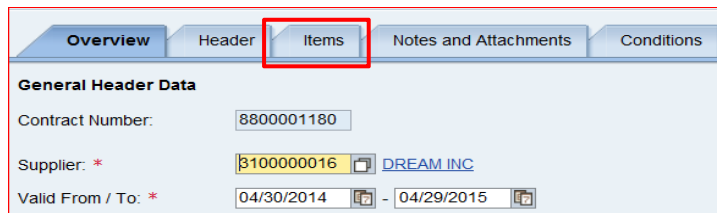
6. In the window displayed, click the date to be populated.



7. Enter the **Target Value** of request.

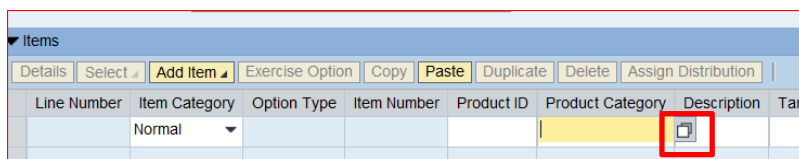


8. Click the **Items** Tab.



- Item Category – Should always equal “Normal”
- Product ID (optional) – Should be entered if there is a specific product (11 Digit NIGP code)

9. Search for the item **Product Category** by clicking the search icon 



Line Number	Item Category	Option Type	Item Number	Product ID	Product Category	Description	Target
	Normal						

- A window will open. Enter a **Description** with asterisks (e.g. \*automobile\* to define the search) and click **Start Search**

- The search results will appear. Highlight the product to be added to the line item and click **OK**.

Description	Category ID	Logical System
Material Group Logical System for REA ...	R3MATCLASS...	
Automotive Vehicles	07000	
Automobiles	07006	REACLNT100
AUTOMOBILES,SCH BUS	07100	
AutoSchi-All Terran	07102	REACLNT100
AutoSchi-Ambulances	07103	REACLNT100
AutoSchi-Station Wag	07104	REACLNT100
AutoSchi-Polic & Sec	07105	REACLNT100
AutoSchi-Bus Chas	07114	REACLNT100
AutoSchi-Buse Compit	07115	REACLNT100
AutoSchi-Small Veh	07116	REACLNT100
AutoSchi-Prisoner Tr	07117	REACLNT100
AutoSchi-Electric Pe	07120	REACLNT100
AutoSchi-Motorscootr	07153	REACLNT100
AutoSchi-Motor Homes	07155	REACLNT100

- The system will add the selected product category to the line item.

Line Number	Item Category	Option Type	Item Number	Product ID	Product Category
	Normal				07006

- Enter a brief **Description** of the item(s) being requested for purchase and the quantity.

Line Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency
		Fleet Vehicles	07006	2		EA	50,000.00	25,000.00	USD

14. If the quantity is known, enter the **Target Quantity** and the **Unit** of measure.

Line Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency
		Fleet Vehicles	07006	2		EA	50,000.00	25,000.00	USD

If the quantity is unknown, then ensure that the **Target Quantity** is set to zero.

15. Enter the **Price** of the items being purchased. This is a required field.

Line Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency
		Fleet Vehicles	07006	2		EA	50,000.00	25,000.00	USD

16. The **Target Value** of each line on the P-1 needs to be completed. If the **Target Value** for a given line is not known, set the **Target Value** on the line to the **Target Value** under the **General Header Data** section of the **Overview** tab.

Line Number	Item Category	Option Type	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price
1.	Normal		1		Bread	37515	0		EA	50,000.00	1.50
2.	Normal		2		Milk	24545	0		EA	50,000.00	2.83
3.	Normal		3		Butter	38010	0		EA	50,000.00	4.00
4.	Normal		4		Eggs	39021	0		EA	50,000.00	0.99

### Trade-in of equipment with purchase

17. Line items for trade-ins must list the following separately:

#### Items being purchased must list:

- Description of the item(s) being purchased.
- Quantity of item(s) being purchased. If there are a group of items, Target Quantity should be "0"
- Target Value should be the total amount of items being purchased
- Unit of Measure
- Price of purchased items. If there is a group of items with different prices, the price should reflect "0".

**Overview** Header Items Notes and Attachments Conditions Authorization Approval Tracking

**General Header Data**

Contract Number: 8900000002 Contract Name: 1130-16-C-OREQ-00004

Supplier: \* Contract Owner: 32316

Valid From / To: \* 04/15/2016 - 04/14/2017 Target Value/ Currency: 45,000.00 USD

Purchasing Organization: \* State of Mississippi - Purchasing Release Value: 0.00 USD

Purchasing Group: \* 1130 OVSIGHT OPTFM Show Members Basic Contract:

**Items**

Details Select Add Item Exercise Option Copy Paste Duplicate Delete Assign Distribution

Line Number	Item Category	Option Type	Item Number	Description	Product Category	Product ID	Target Quantity	Option Status	Unit	Target Value	Price
1	Normal		1	Purchased Item	12022		2		EA	45,000.00	22,500.00
2	Normal		2	Trade-in amount (\$25,000)	12022		2		EA	0.00	12,500.00

**Items being traded must list:**

- Description of the equipment being traded. Must include trade-in value within description
- Quantity of item(s) being traded. If there are a group of items, the Target Quantity should be "0"
- Target Value – must be "0.00"
- Unit of Measure
- Price of traded items. If there are a group of items, the price should reflect "0"

**Overview** Header Items Notes and Attachments Conditions Authorization Approval Tracking

**General Header Data**

Contract Number: 8900000002 Contract Name: 1130-16-C-OREQ-00004

Supplier: \* Contract Owner: 32316

Valid From / To: \* 04/15/2016 - 04/14/2017 Target Value/ Currency: 45,000.00 USD

Purchasing Organization: \* State of Mississippi - Purchasing Release Value: 0.00 USD

Purchasing Group: \* 1130 OVSIGHT OPTFM Show Members Basic Contract:

**Items**

Details Select Add Item Exercise Option Copy Paste Duplicate Delete Assign Distribution

Line Number	Item Category	Option Type	Item Number	Description	Product Category	Product ID	Target Quantity	Option Status	Unit	Target Value	Price
1	Normal		1	Purchased Item	12022		2		EA	45,000.00	22,500.00
2	Normal		2	Trade-in amount (\$25,000)	12022		2		EA	0.00	12,500.00

**Note:** The total amount of items being purchased must equal the Target Value on the Overview Tab as seen below.

**Overview** Header Items Notes and Attachments Conditions Authorization Approval Tracking

**General Header Data**

Contract Number: 8900000002 Contract Name: 1130-16-C-OREQ-00004

Supplier: \* Contract Owner: 32316

Valid From / To: \* 04/15/2016 - 04/14/2017 Target Value/ Currency: 45,000.00 USD

Purchasing Organization: \* State of Mississippi - Purchasing Release Value: 0.00 USD

Purchasing Group: \* 1130 OVSIGHT OPTFM Show Members Basic Contract:

**Items**

Details Select Add Item Exercise Option Copy Paste Duplicate Delete Assign Distribution

Line Number	Item Category	Option Type	Item Number	Description	Product Category	Product ID	Target Quantity	Option Status	Unit	Target Value	Price
1	Normal		1	Purchased Item	12022		2		EA	45,000.00	22,500.00
2	Normal		2	Trade-in amount (\$25,000)	12022		2		EA	0.00	12,500.00

Revised April 15, 2016

### Step Three: Header – Additional Information

- (1) Click the **Header**, then **Additional Information Subtab** tab.

- (2) Enter the following information on the Additional Information tab. Fields with \* are required fields.

- f) **Request Type:** Use the drop down and select the appropriate value.

- g) **Contract Category:** Use the drop down and select the value “OPTFM P-1”.
- h) **Contract Performance Location:** Use the dropdown and select the applicable county where the item/service is to be utilized (If there is more than one, select “Multiple Locations” or “Statewide” or “Other”).
- i) **Material/Service Type:** Use the dropdown and select “Commodity (NON-IT)”
- j) **Reference Contract Number:** Use this field to record an internal agency reference number if needed, this field can be queried upon via advanced search in SRM

Overview	Header	Items	Notes and Attachments	Conditions	Authorization	Approval	Tracking
Basic Data	Condition	Exchange Rate Thresholds	Distribution	Notes and Attachments	Output	Additional Information	Pay
▼ Additional Information							
<b>General Contract Attributes</b>				Material/Service Type: * COMMODITIES - (NON-IT)			
Reference Contract Number: <input type="text"/>				P-Card: <input type="radio"/> Yes <input checked="" type="radio"/> No			
Request Type: * COMPETITIVE RFX				Contract Performance Location: * AMITE			
Contract Category: * OPTFM-P1				Vendor Congressional District: <input type="text"/>			
<b>Agency / Board Approval</b>				Oversight Approval: <input checked="" type="radio"/> No <input type="radio"/> Yes			
Agency / Board Approval: <input type="text"/>				Document Builder Doc Type: ZCNT_OPT_NEG			
Agency / Board Approval Date: <input type="text"/>				Total Renewals: <input type="text"/>			
Fed Grant Award Number: * 123456A				Renewals Exercised: <input type="text"/>			
Fed Aid Number: * 123456A				Buy On Behalf: <input type="checkbox"/>			
CFDA Number: * 10.406 A1B2C3							
Stimulus Funded: * <input type="radio"/> Yes <input checked="" type="radio"/> No							
Federal Funds Indicator: <input checked="" type="radio"/> Yes <input type="radio"/> No							
State Fund %: * 90.00							
Federal Funds %: * 5.00							
Other Amount %: * 5.00							
Federal Amount: * 2,500.00							
State Amount: * 45,000.00							
Other Amount: * 2,500.00							
Contract Total Value: * 50,000.00							

(3) Enter the following funding source information. These fields are required for Transparency reporting.

- b) **Stimulus Funded:** Select the appropriate value.
- c) **Federal Funds Indicator:** Select “Yes” if federal funds are used to procure the commodity. The system will default to “No.”

If “NO”, the contract does not require a Federal Fund % or Federal Amount (fields will be grayed out). Therefore, the State Fund% and Other Amount % must total to 100%. State and Other Amount fields must equal to the Contract Total Value.

Stimulus Funded:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Federal Funds Indicator:	<input type="radio"/> Yes <input checked="" type="radio"/> No
State Fund %: *	90.00
Federal Funds %:	0.00
Other Amount %: *	10.00
Federal Amount:	0.00
State Amount: *	45,000.00
Other Amount: *	5,000.00
Contract Total Value: *	50,000.00



If Federal Funds Indicator is "YES."

- d) A Federal Funds % or Federal Amount must be entered.
- e) Fed Grant Award Number, Fed Aid Number, and CFDA Number will also be required.
- f) Federal, State, and/or Other % or Amount must total 100% and amounts must equal Contract Total Value.

The screenshot shows a form with several fields. A red box highlights the top three fields: Fed Grant Award Number (123456A), Fed Aid Number (123456A), and CFDA Number (10.567 and 123). Another red box highlights the State Fund % (90.00), Federal Funds % (5.00), and Other Amount % (5.00) fields, with a callout box stating "Must Equal 100%". A third red box highlights the Federal Amount (2,500.00), State Amount (45,000.00), Other Amount (2,500.00), and Contract Total Value (50,000.00) fields, with a callout box stating "Must add up to Contract Total Value".

Fed Grant Award Number:	123456A
Fed Aid Number:	123456A
CFDA Number:	10.567 123
Stimulus Funded:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Federal Funds Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No
State Fund %:	90.00
Federal Funds %:	5.00
Other Amount %:	5.00
Federal Amount:	2,500.00
State Amount:	45,000.00
Other Amount:	2,500.00
Contract Total Value:	50,000.00

(4) Enter the option **Green Attributes** information.

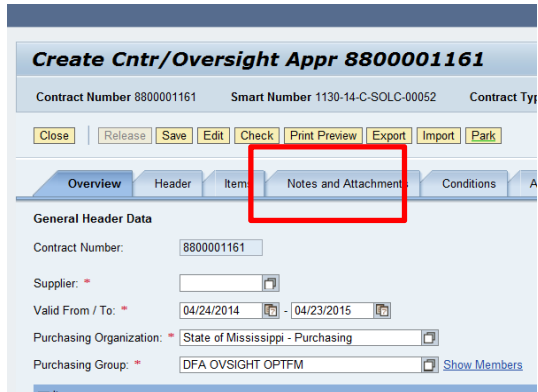
- a) **Recycled Goods:** Use the dropdown and select the applicable value (Recycled, No, Partial). If "Partial" is selected, the Recycled Good Percentage must be entered.
- b) **Energy Efficient:** Select the appropriate value.
- c) **Green Technology or Products:** Select the appropriate value.
- d) **Manufactured in Mississippi:** Select the appropriate value.
- e) **Carbon Footprint:** Free-text field for you to enter the appropriate value.

The screenshot shows the "Green Attributes" section of a form with the following fields:

- Recycled Goods: [Dropdown menu]
- Recycled Goods Percentage: [Text input field]
- Energy Efficiency:  Yes  No
- Green Technology or Products:  Yes  No
- Manufactured in Mississippi:  Yes  No
- Carbon Footprint: [Text input field]

## Step Four: Notes and Attachments

(1) Click the main **Notes and Attachments** tab.



**Create Cntr/Oversight Appr 8800001161**

Contract Number 8800001161 Smart Number 1130-14-C-SOLC-00052 Contract Typ

Close Release Save Edit Check Print Preview Export Import Park

Overview Header Items **Notes and Attachments** Conditions A

**General Header Data**

Contract Number: 8800001161

Supplier: \*

Valid From / To: \* 04/24/2014 - 04/23/2015

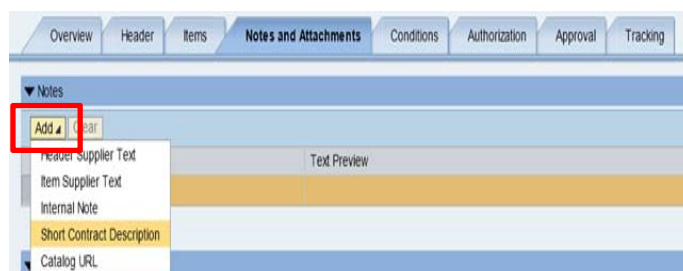
Purchasing Organization: \* State of Mississippi - Purchasing

Purchasing Group: \* DFA OVSIGHT OPTFM Show Members

(2) Click **Add** then **Short Contract Description**. The description is a required field and can be up to 60 characters in length. Enter a brief description of the contract.

a. The description must begin with one of the following phrases:

- Bid Solicitation for....
- Sole source request for...
- Research request for...
- Exemption from state contract for...
- Open purchase for...
- Trade-In of Equipment with Purchase



Overview Header Items **Notes and Attachments** Conditions Authorization Approval Tracking

Notes

Add Clear

Header Supplier Text Text Preview

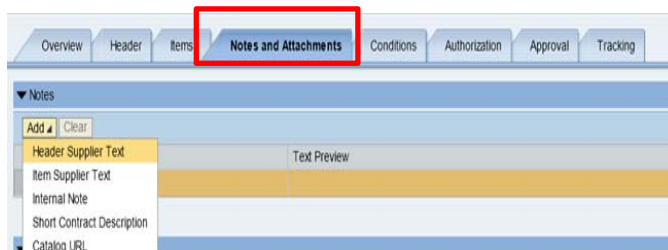
Item Supplier Text

Internal Note

Short Contract Description

Catalog URL

(3) Click **Add** then **Header Supplier Text**. Enter a detailed description of the items requested.



Overview Header Items **Notes and Attachments** Conditions Authorization Approval Tracking

Notes

Add Clear

Header Supplier Text Text Preview

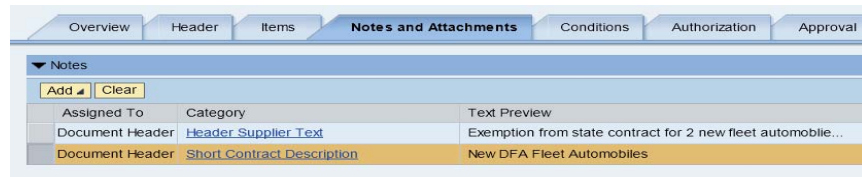
Item Supplier Text

Internal Note

Short Contract Description

Catalog URL

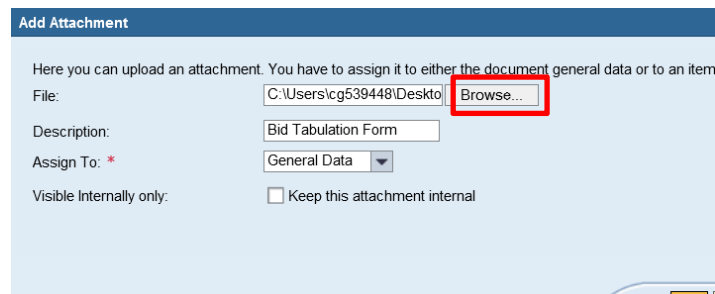
(4) Internal Note and Item Supplier Text are optional fields and all notes will be displayed as seen below.



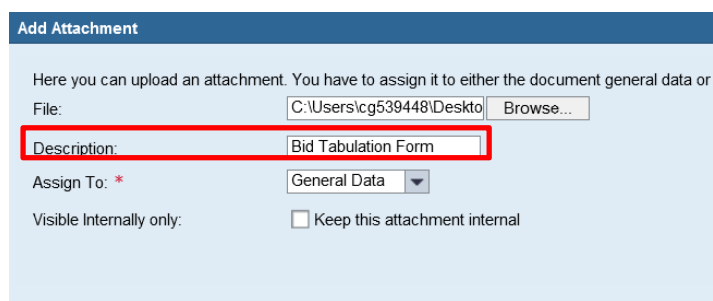
(5) Select the **Add Attachment** button to upload all required documents needed for approval.



(6) A small window will display; select the **Browse...** button to select a document from your computer.



(7) Enter a description of the document to be added.



- (8) Documents must be marked internal or external and must be in compliance with MS Code 27-104-155. NOTE, if the box is **unchecked**, it will be visible to the public for Transparency requirement.
- Continue to select the **Add Attachment** button to upload all remaining documents such as the Contract, Bid Specs, Justification Letter and Bid Tabulation, advertisement, etc.

Visible Internally only:  Keep this attachment internal

- (9) Select the **OK** button to return the file to the Notes and Attachment display.

**Add Attachment**

Here you can upload an attachment. You have to assign it to either the document general data or to an item

File: C:\Users\lg539448\Desktop Browse...

Description: Bid Tabulation Form

Assign To: \* General Data

Visible Internally only:  Keep this attachment internal


OK Cancel

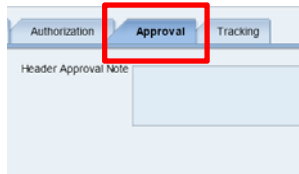
- (10) The system will display the added document to the table below

Assigned To	Category	Description	File Name	Version	Processor	Visible
Document Header	Standard Attachment	Bid Tabulation Form	IN077490_Transparency Website Issue.msg	1		<input type="checkbox"/>

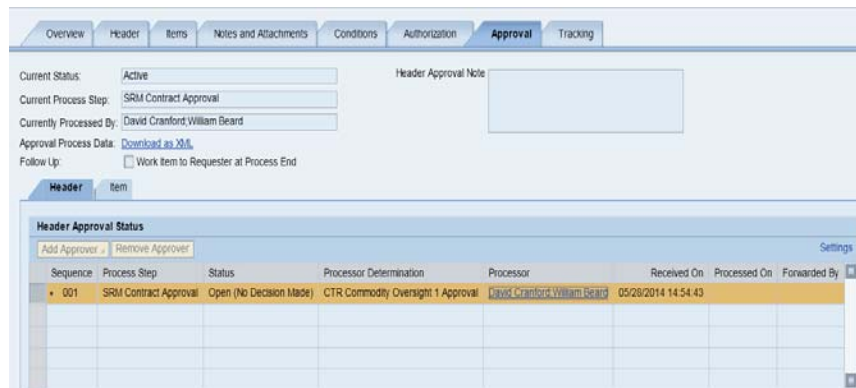
- (11) Once all the information is entered click **OK**.

## Step Five: Release for Approval

- (1) Once all required information has been entered, select **Release**  to send the contract through approval.
- (2) Approvals can be displayed by selecting the **Approval** tab.



- (3) The Commodity Oversight Approvers are required to approve all P-1 Requests.



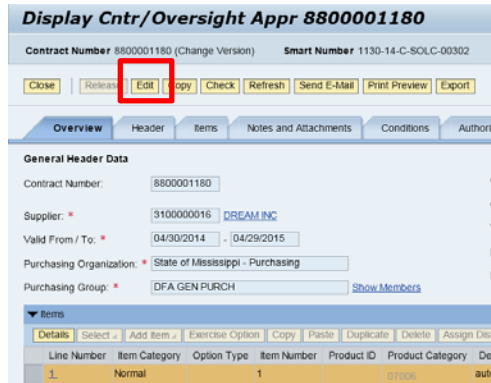
A screenshot of a software interface showing the 'Approval' tab. The interface includes a navigation bar with tabs: Overview, Header, Items, Notes and Attachments, Conditions, Authorization, Approval, and Tracking. The 'Approval' tab is active. Below the navigation bar, there are several fields: Current Status (Active), Current Process Step (SRM Contract Approval), Currently Processed By (David Cranford, William Beard), Approval Process Data (Download as XML), and Follow Up (Work item to Requester at Process End). Below these fields, there is a 'Header Approval Status' table with columns: Sequence, Process Step, Status, Processor Determination, Processor, Received On, Processed On, and Forwarded By. The table contains one row of data.

Sequence	Process Step	Status	Processor Determination	Processor	Received On	Processed On	Forwarded By
001	SRM Contract Approval	Open (No Decision Made)	CTR Commodity Oversight 1 Approval	David Cranford, William Beard	05/28/2014 14:54:43		

## How to Modify a P-1 Contract

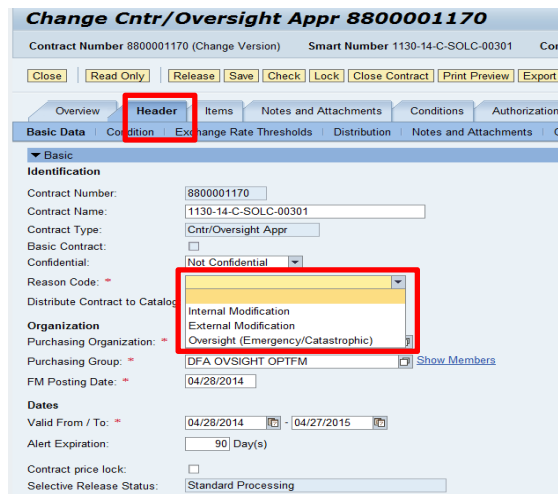
A P-1 may need to be modified for any number of reasons such as appropriate attachments were not attached.

- (1) To edit a released contract for modifications, search for the contract and select the **Edit** button to make the necessary changes.



The screenshot shows the 'Display Cntr/Oversight Appr 8800001180' interface. At the top, there are buttons for 'Close', 'Release', 'Edit', 'Copy', 'Check', 'Refresh', 'Send E-Mail', 'Print Preview', and 'Export'. The 'Edit' button is highlighted with a red box. Below the buttons, there are tabs for 'Overview', 'Header', 'Items', 'Notes and Attachments', 'Conditions', and 'Authorization'. The 'Overview' tab is selected, showing 'General Header Data' with fields for Contract Number, Supplier, Valid From / To, Purchasing Organization, and Purchasing Group. Below this is an 'Items' section with a table of contract items.

- (2) The system will require the Buyer to enter a Header Reason code, Modification Type and Modification Description.
- (3) There are three different reasons to select when modifying a contract. The system will require a reason for the changes by displaying hard error messages:
  - a) Internal Modification: A modification that does not affect the terms and conditions of the contract (i.e. Adding an internal note)
  - b) External Modification: A change that affects the terms and conditions (i.e. change of price, adding an attachment, change of validity dates).
  - c) Oversight (Emergency/Catastrophic): **Not applicable: does not apply to P-1 Requests**
- (4) Select Header tab and select a reason code (ex. Used "External Modification")



The screenshot shows the 'Change Cntr/Oversight Appr 8800001170' interface. At the top, there are buttons for 'Close', 'Read Only', 'Release', 'Save', 'Check', 'Lock', 'Close Contract', 'Print Preview', and 'Export'. The 'Header' tab is selected, showing 'Basic Data' with fields for Contract Number, Contract Name, Contract Type, Basic Contract, Confidential, Reason Code, Distribute Contract to Catalog, Organization, Purchasing Organization, Purchasing Group, FM Posting Date, Dates, Valid From / To, Alert Expiration, Contract price lock, and Selective Release Status. The 'Reason Code' dropdown menu is open, showing options: Internal Modification, External Modification, and Oversight (Emergency/Catastrophic). The 'External Modification' option is highlighted with a red box.

(5) Select **External Modification** and the system will update the Smart Number to a new version.

**Change Cntr/Oversight Appr 8800001170**  
Contract Number 8800001170 (Change Version) Smart Number 1130-14-C-SOLC-00301-V001

The Modification Type on the Additional Information tab is required - [Display Help](#)  
Modification Description on the Additional Information tab is required - [Display Help](#)

[Close](#) [Read Only](#) [Release](#) [Save](#) [Check](#) [Lock](#) [Close Contract](#) [Print Preview](#) [Export](#)

Overview **Header** Items Notes and Attachments Conditions Authorization

Basic Data Condition Exchange Rate Thresholds Distribution Notes and Attachments

Basic

Identification

Contract Number: 8800001170  
Contract Name: 1130-14-C-SOLC-00301-V001  
Contract Type: Cntr/Oversight Appr  
Basic Contract:   
Confidential: Not Confidential  
Reason Code: **External Modification**  
Distribute Contract to Catalog:

Organization

Purchasing Organization: State of Mississippi - Purchasing  
Purchasing Group: DFA OVSIGHT OPTFM [Show Members](#)  
FM Posting Date: 04/28/2014

Dates

Valid From / To: 04/28/2014 - 04/27/2015  
Alert Expiration: 90 Day(s)  
Contract price lock:   
Selective Release Status: Standard Processing

(6) Depending on the reason code the Smart Number may or may not change. The diagram below shows the reason for modifying the contract as external, note the smart number now includes a version number of (v001). This number will increase every time the contract modification reason is “External”.

**Change Cntr/Oversight Appr 8800001170**  
Contract Number 8800001170 (Change Version) **Smart Number 1130-14-C-SOLC-00301-V001**

The Modification Type on the Additional Information tab is required - [Display Help](#)  
Modification Description on the Additional Information tab is required - [Display Help](#)

[Close](#) [Read Only](#) [Release](#) [Save](#) [Check](#) [Lock](#) [Close Contract](#) [Print Preview](#) [Export](#)

Overview **Header** Items Notes and Attachments Conditions Authorization

Basic Data Condition Exchange Rate Thresholds Distribution Notes and Attachments

Basic

Identification

Contract Number: 8800001170  
Contract Name: 1130-14-C-SOLC-00301-V001  
Contract Type: Cntr/Oversight Appr  
Basic Contract:   
Confidential: Not Confidential  
Reason Code: **External Modification**  
Distribute Contract to Catalog:

Organization

Purchasing Organization: State of Mississippi - Purchasing  
Purchasing Group: DFA OVSIGHT OPTFM [Show Members](#)  
FM Posting Date: 04/28/2014

Dates

Valid From / To: 04/28/2014 - 04/27/2015  
Alert Expiration: 90 Day(s)  
Contract price lock:   
Selective Release Status: Standard Processing

(7) If **Internal Modification** is selected, the Smart Number does not update.

**Change Cntr/Oversight Appr 8800001170**  
Contract Number 8800001170 (Change Version) Smart Number 1130-14-C-SOLC-00301

The Modification Type on the Additional Information tab is required - [Display Help](#)  
Modification Description on the Additional Information tab is required - [Display Help](#)

Close Read Only Release Save Check Lock Close Contract Print Preview Export

Overview Header Items Notes and Attachments Conditions Authorization

Basic Data Condition Exchange Rate Thresholds Distribution Notes and Attachments

Basic Identification

Contract Number: 8800001170  
Contract Name: 1130-14-C-SOLC-00301  
Contract Type: Cntr/Oversight Appr  
Basic Contract:   
Confidential:   
Reason Code: **Internal Modification**  
Distribute Contract to Catalog: No

Organization

Purchasing Organization: State of Mississippi - Purchasing  
Purchasing Group: DFA OVSIGHT OPTFM Show Members  
FM Posting Date: 04/28/2014

Dates

Valid From / To: 04/28/2014 - 04/27/2015  
Alert Expiration: 90 Day(s)  
Contract price lock:   
Selective Release Status: Standard Processing

(8) Make the necessary modification such as attach documents etc.

(9) Select the sub tab **Additional Information** tab from the Header tab to provide additional reason. On the **Modification Type** field, a dropdown will display for a reason to be selected. In **Modification Description** field, enter a reason.

Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking

Basic Data Condition Exchange Rate Thresholds Distribution Notes and Attachments Output Additional Information Payment Acc

Additional Information

General Contract Attributes

Reference Contract Number:   
Request Type: Approval Request  
Contract Category: OPTFM-P1  
Modification Type: **CORRECTION**  
Modification Description: **Enter a free text for reason**

Agency / Board Approval

Service Type: EQUIPMENT INSPECTORS  
P-Card:  Yes  No  
Contract Performance Location: MULTIPLE LOCATION  
Vendor Congressional District:   
Oversight Approval:  No  Yes  
Document Builder Doc Type: ZCNT\_OPT\_NI  
Total Renewals:

(10) Select the **Check** button to make sure there are no errors displayed. If there are none, select the **Release** button trigger approval through workflow the same approval chain.

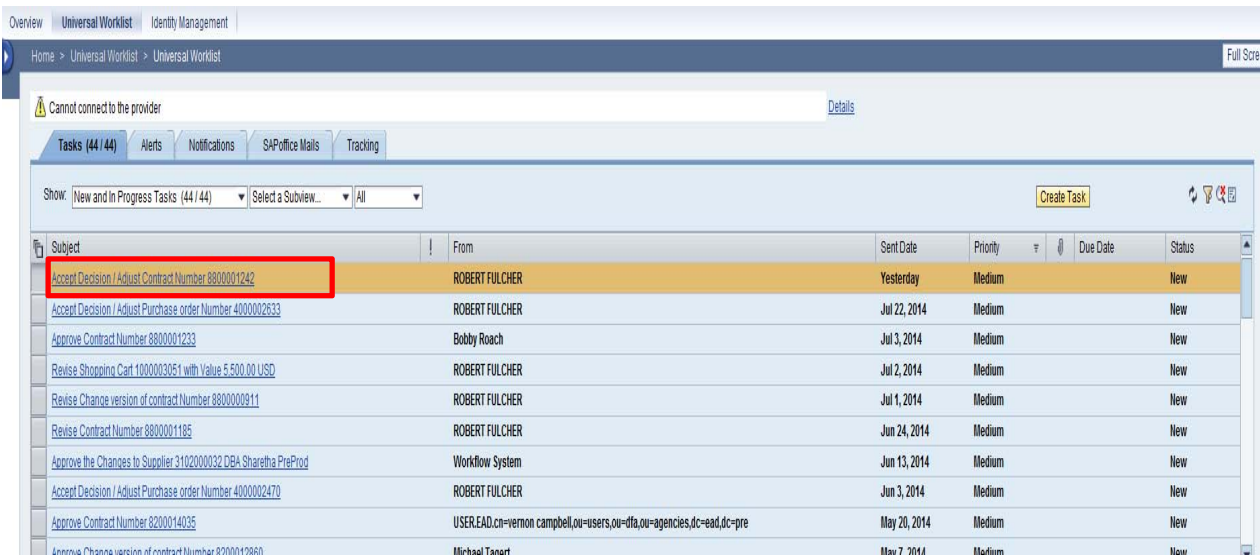


# How to Modify a Rejected P-1

- 1. Navigate to the Universal Worklist.



- 2. Click on the applicable contract link to open the document.



Subject	From	Sent Date	Priority	Due Date	Status
<a href="#">Accept Decision / Adjust Contract Number 8800001242</a>	ROBERT FULCHER	Yesterday	Medium		New
<a href="#">Accept Decision / Adjust Purchase order Number 4000002633</a>	ROBERT FULCHER	Jul 22, 2014	Medium		New
<a href="#">Approve Contract Number 8800001233</a>	Bobby Roach	Jul 3, 2014	Medium		New
<a href="#">Revise Shopping Cart 1000003051 with Value 5,500.00 USD</a>	ROBERT FULCHER	Jul 2, 2014	Medium		New
<a href="#">Revise Change version of contract Number 8800000911</a>	ROBERT FULCHER	Jul 1, 2014	Medium		New
<a href="#">Revise Contract Number 8800001185</a>	ROBERT FULCHER	Jun 24, 2014	Medium		New
<a href="#">Approve the Changes to Supplier 3102000032 DBA Sharetha PreProd</a>	Workflow System	Jun 13, 2014	Medium		New
<a href="#">Accept Decision / Adjust Purchase order Number 4000002470</a>	ROBERT FULCHER	Jun 3, 2014	Medium		New
<a href="#">Approve Contract Number 8200014035</a>	USER:ead.cn=vernon.campbell,ou=users,ou=ofa,ou=agencies,dc=ead,dc=pre	May 20, 2014	Medium		New
<a href="#">Approve Change version of contract Number 8200010960</a>	Michael Tanart	May 7, 2014	Medium		New

- 3. Click the **Edit** button.



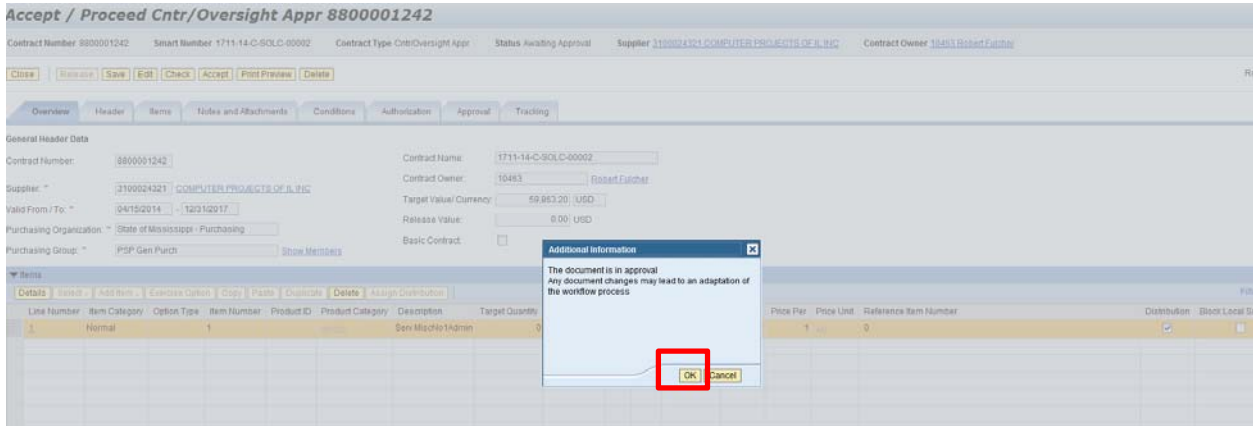
**Accept / Proceed Cntr/Oversight Appr 8800001242**

Contract Number 8800001242    Smart Number 1711-14-C-SOLC-00002    Contract Type Cntr/Oversight Appr    Status Awaiting Approval    Supplier 3100024321

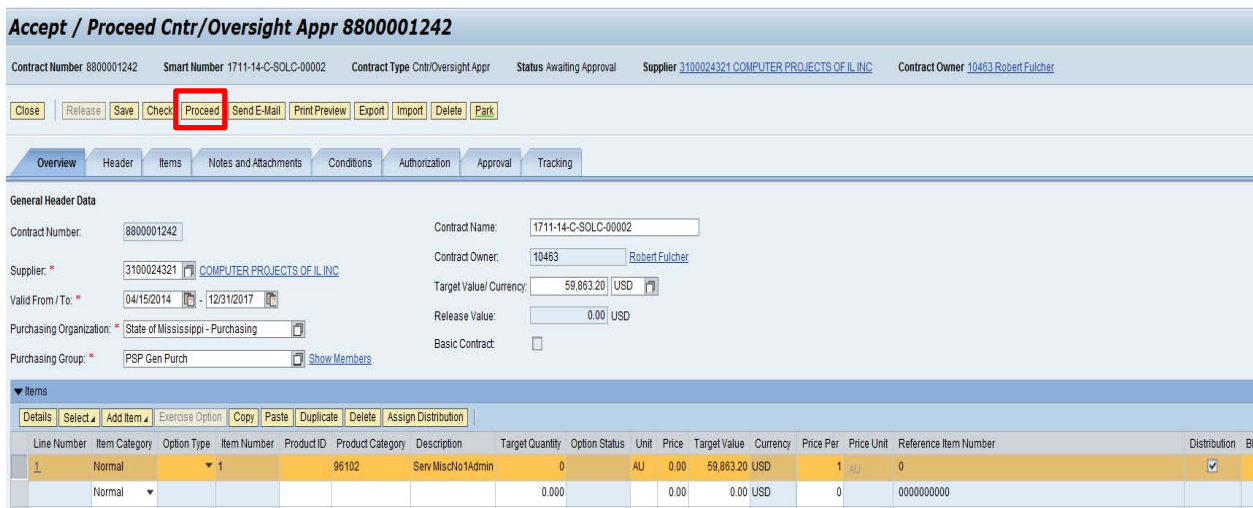
Close    Release    Save    **Edit**    Check    Accept    Print Preview    Delete

Overview    Header    Items    Notes and Attachments    Conditions    Authorization    Approval    Tracking

4. An Additional Information message will appear; Click **OK**.



5. Make the necessary changes to the contract and click **Proceed**.  
- Once Proceed is selected, the P-1 will be released for approval.



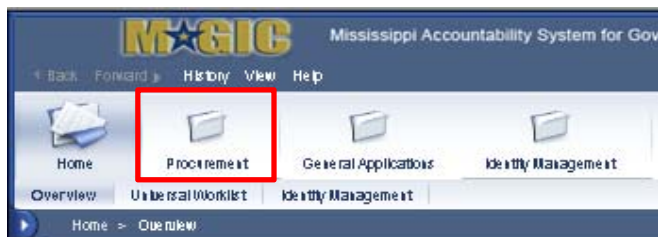
## How to Create an Open Purchase Order P-1 Request (State Agencies ONLY)

Start the transaction using the menu path or transaction code.

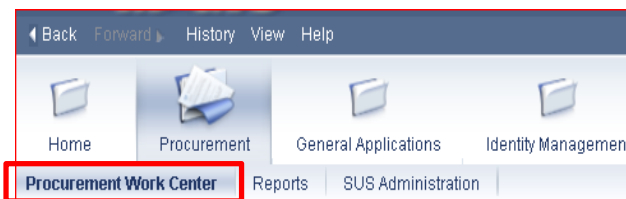
1. Using your User-ID and Password Log into MAGIC:  
<https://portal.magic.ms.gov>



2. Select **Procurement** icon from the home page options.



3. Select **Procurement Work Center**




Select Purchase Order Type

## Select Purchase Order Type

Start Close

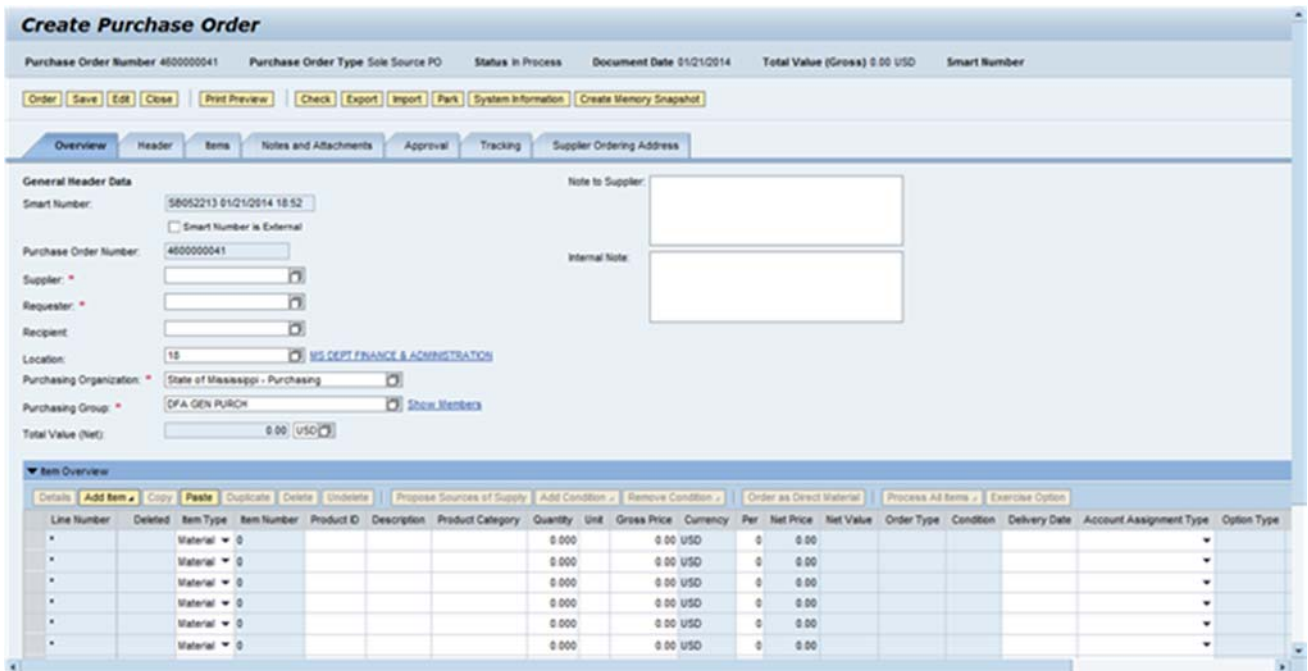
Select the type of purchase order that you want to create.

Purchase Order Type	Purchase Order Type Description	Partner Grouping Schema
EMER	Emergency PO	
PO	General PO	
SOLE	PO/Oversight Appr	

4. Click  to select Sole Source PO.

5. Click .

## Create Purchase Order



Purchase Order Number 460000041 Purchase Order Type Sole Source PO Status In Process Document Date 01/21/2014 Total Value (Gross) 0.00 USD Smart Number

Order Save Edit Close Print Preview Check Export Import Park System Information Create Memory Snapshot

Overview Header Items Notes and Attachments Approval Tracking Supplier Ordering Address

General Header Data

Smart Number: 58052213 01/21/2014 18:52  
 Smart Number is External

Purchase Order Number: 460000041

Supplier:

Requester:

Recipient:

Location: 18  MIS DEPT FINANCE & ADMINISTRATION

Purchasing Organization: State of Mississippi - Purchasing

Purchasing Group: DFA GEN PURCH  Show Members

Total Value (Net): 0.00 USD

Note to Supplier:

Internal Note:

▼ Both Overview

Details Add Item Copy Paste Duplicate Delete Undelete Propose Sources of Supply Add Condition Remove Condition Order as Direct Material Process All Items Exercise Option

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Net Value	Order Type	Condition	Delivery Date	Account Assignment Type	Option Type
*		Material	0				0.000		0.00	USD	0	0.00						
*		Material	0				0.000		0.00	USD	0	0.00						
*		Material	0				0.000		0.00	USD	0	0.00						
*		Material	0				0.000		0.00	USD	0	0.00						
*		Material	0				0.000		0.00	USD	0	0.00						
*		Material	0				0.000		0.00	USD	0	0.00						

6. As required, complete/review the following fields:

## Create Purchase Order

**Create Purchase Order**

Purchase Order Number: 460000041    Purchase Order Type: Sole Source PO    Status: In Process    Document Date: 01/21/2014    Total Value (Gross): 0.00 USD    Smart Number

Order Save Edit Close Print Preview Check Export Import Park System Information Create Memory Snapshot

Overview Header Items Notes and Attachments Approval Tracking Supplier Ordering Address

**General Header Data**

Smart Number: 56052213 01/21/2014 18:52  
 Smart Number is External

Purchase Order Number: 460000041

Supplier:

Requester: 45504

Recipient: 45504

Location: 18 [WS DEPT FINANCE & ADMINISTRATION](#)

Purchasing Organization: State of Mississippi - Purchasing

Purchasing Group: DFA GEN PURCH [Show Members](#)

Total Value (Net): 0.00 USD

Note to Supplier:

Internal Note:

**Item Overview**

Details Add Item Copy Paste Duplicate Delete Undelete Propose Sources of Supply Add Condition Remove Condition Order as Direct Material Process All Items Exercise Option

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Net Value	Order Type	Condition	Delivery Date	Account Assignment Type	Option Type
*		Material	0				0.000		0.00	USD	0	0.00	0.00					
*		Material	0				0.000		0.00	USD	0	0.00	0.00					
*		Material	0				0.000		0.00	USD	0	0.00	0.00					
*		Material	0				0.000		0.00	USD	0	0.00	0.00					
*		Material	0				0.000		0.00	USD	0	0.00	0.00					
*		Material	0				0.000		0.00	USD	0	0.00	0.00					

7. Click **Add Item**.

**Create Purchase Order**

**Create Purchase Order**

Purchase Order Number: 460000041    Purchase Order Type: Sole Source PO    Status: In Process    Document Date: 01/21/2014    Total Value (Gross): 0.00 USD    Smart Number

Order Save Edit Close Print Preview Check Export Import Park System Information Create Memory Snapshot

Overview Header Items Notes and Attachments Approval Tracking Supplier Ordering Address

**General Header Data**

Smart Number: 56052213 01/21/2014 18:52  
 Smart Number is External

Purchase Order Number: 460000041

Supplier:

Requester: 45504

Recipient:

Location: **Add Limit Item** [WS DEPT FINANCE & ADMINISTRATION](#)

Purchasing:

Purchasing:  [Show Members](#)

Total Value:

Note to Supplier:

Internal Note:

**Item Overview**

Details Add Item Copy Paste Duplicate Delete Undelete Propose Sources of Supply Add Condition Remove Condition Order as Direct Material Process All Items Exercise Option

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Net Value	Order Type	Condition	Delivery Date	Account Assignment Type	Option Type
*		Material	0				0.000		0.00	USD	0	0.00	0.00					
*		Material	0				0.000		0.00	USD	0	0.00	0.00					
*		Material	0				0.000		0.00	USD	0	0.00	0.00					
*		Material	0				0.000		0.00	USD	0	0.00	0.00					
*		Material	0				0.000		0.00	USD	0	0.00	0.00					
*		Material	0				0.000		0.00	USD	0	0.00	0.00					

8. Click **Add Limit Item**.



The limit item can also be used for Blanket POs to set aside a specified amount of funds for a period of time.

**Add Limit Item**

**Add Limit Item**

▼ Basic

Item Number: 1

Configurable Item Number:

Description:

Product Category:

Required: Between 01/21/2014 -

Value Limit: 0.00 USD  Unlimited

Expected value: 0.00 USD

Tax Code:

Add to Item Overview Cancel

9. As required, complete/review the following fields:

**Add Limit Item**

**Add Limit Item**

▼ Basic

Item Number: 1

Configurable Item Number:

Description: Auto Repair Parts

Product Category:


Required: Between 01/21/2014 -

Value Limit: 0.00 USD  Unlimited

Expected value: 0.00 USD

Tax Code:

Add to Item Overview Cancel

10. Click  to search for the Product Category.

## Search Product Category

Display As: Hierarchy

Note: Placeholder search with \* is possible. Search ignores upper/lowercase spelling.

Product Category ID:

Description:

Logical System:

Restrict Number of Value List Entries 500

Start Search Reset

OK Cancel

11. As required, complete/review the following fields:

Item Detail 0 Unsaved data will be lost

Expand All Collapse All

Description	Category ID	Logical System
▼ Material Group Logical System for ...	R3MATCLASSREACL...	
▶ Air Equip,Parts,Supp	03500	
▼ Auto-acc buses/truck	05500	
▪ Auto-airbags/Auto	05502	TEACLNT100
▪ Auto-air condn parts	05504	TEACLNT100
▪ Auto-security dev	05505	TEACLNT100
▪ Auto-Auto top carr	05506	TEACLNT100
▪ Auto-belts/child rst	05508	TEACLNT100
▪ Auto-Brake Adj	05510	TEACLNT100
▪ Auto-bug screen	05511	TEACLNT100
▪ Auto-camera	05512	TEACLNT100
▪ Auto-car seats	05513	TEACLNT100
▪ Auto- chains& trac	05515	TEACLNT100
▪ Auto-consoles/police	05516	TEACLNT100
▪ Auto - cnsl access	05517	TEACLNT100

OK Cancel

13. Click  Auto-air condn parts

### Search Product Category

Search Product Category

Display As: Hierarchy

Note: Placeholder search with \* is possible. Search ignores upper/lowercase spelling.

Product Category ID:

Description: \*auto\*

Logical System:

Restrict Number of Value List Entries

Start Search Reset

Item Detail 0 Unsaved data will be lost

Expand All Collapse All

Description	Category ID	Logical System
▼ Material Group Logical System for ...	R3MATCLASSREACL...	
▶ Air Equip,Parts,Supp	03500	
▼ Auto-acc buses/truck	05500	
▪ Auto-airbags/Auto	05502	TEACLNT100
▪ Auto-air condn parts	05504	TEACLNT100
▪ Auto-security dev	05505	TEACLNT100
▪ Auto-Auto top carr	05506	TEACLNT100
▪ Auto-belts/child rst	05508	TEACLNT100
▪ Auto-Brake Adj	05510	TEACLNT100
▪ Auto-bug screen	05511	TEACLNT100
▪ Auto-camera	05512	TEACLNT100
▪ Auto-car seats	05513	TEACLNT100
▪ Auto- chains& trac	05515	TEACLNT100
▪ Auto-consoles/police	05516	TEACLNT100
▪ Auto - cnsl access	05517	TEACLNT100

OK Cancel

14. Click

### Add Limit Item



**Add Limit Item**

▼ Basic

Item Number: 1

Configurable Item Number:

Description: Auto Repair Parts

Product Category: 05504 Auto-air condn parts

Required: Between 01/21/2014 -

Value Limit: 0.00 USD  Unlimited

Expected value: 0.00 USD

Tax Code:

Add to Item Overview Cancel

15. Click Required: ▼.

**Add Limit Item**

**Add Limit Item**

▼ Basic

Item Number: 1

Configurable Item Number:

Description: Auto Repair Parts

Product Category: 05504 Auto-air condn parts

Required: Between 01/21/2014 -

Value Limit:
 

Between	0.00	USD	<input type="checkbox"/> Unlimited
On			
From	0.00	USD	

Expected value: 0.00 USD

Tax Code:

Add to Item Overview Cancel

16. Click On.

## Add Limit Item

**Add Limit Item**

▼ Basic

Item Number: 1

Configurable Item Number:

Description: Auto Repair Parts

Product Category: 05504  Auto-air condn parts


Required: On 01/21/2014

Value Limit: 0.00 USD  Unlimited

Expected value: 0.00 USD

Tax Code:

Add to Item Overview Cancel

17. Click  to view the calendar.

## Add Limit Item

**Add Limit Item**

▼ Basic

Item Number: 1

Configurable Item Number:

Description: Auto Repair Part

Product Category: 05504

Required: On 01/21/2014

Value Limit: 0.00 USD  Unlimited

Expected value: 0.00 USD

Tax Code:

Add to Item Overview Cancel

January 2014						
Mo	Tu	We	Th	Fr	Sa	Su
1	30	31	1	2	3	4
2	6	7	8	9	10	11
3	13	14	15	16	17	18
4	20	21	22	23	24	25
5	27	28	29	30	31	1
6	3	4	5	6	7	8

18. Click <sup>31</sup>.

### Add Limit Item

▼ Basic

Item Number: 1

Configurable Item Number:

Description: Auto Repair Parts

Product Category: 05504  Auto-air condn parts

Required: On 01/31/2014

Value Limit: 0.00 USD  Unlimited

Expected value: 0.00 USD

Tax Code:

Add to Item Overview Cancel

19. As required, complete/review the following fields:

Field

R/O/C

Value Limit:

Required

### Add Limit Item

▼ Basic

Item Number: 1

Configurable Item Number:

Description: Auto Repair Parts

Product Category: 05504  Auto-air condn parts

Required: On 01/31/2014

Value Limit: 750.00 USD  Unlimited

Expected value: 0.00 USD

Tax Code:

Add to Item Overview Cancel

20. Click **Add to Item Overview**.

## Create Purchase Order

Smart Number: 58052213 01/21/2014 18:52  
 Smart Number is External

Purchase Order Number: 4800000041

Supplier:

Requester: 45504  Sherry, Benoit

Recipient: 45504  Sherry, Benoit

Location: 18  MS DEPT FINANCE & ADMINISTRATION

Purchasing Organization: State of Mississippi - Purchasing

Purchasing Group: DFA GEN PURCH

Total Value (Net): 750.00 USD


Internal Note:

---

**Item Overview**

Details Add Item Copy Paste Duplicate Delete Unsubscribe Propose Sources of Supply Add Condition Remove Condition Order as Direct Material Process All Items Exercise Option

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Net Value	Order Type	Condition	Delivery Date	Account Assignment
1		Limit	1		Auto Repair Parts	05504	Overall Limit	750.00	0.00	USD	Expected Value	750.00	0.00			01/31/2014	Cost Center
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
Total Value (Net)																	
Total Value (Gross)																	

21. Click  to search for a supplier.

**Supplier: All Values**

22. As required, complete/review the following fields:

Field

R/O/C

Name 1/last name:

Required

### Supplier: All Values

Supplier: All Values

Hide Filter Criteria Settings

Business partner:

Search term 1:

Search term 2:

Name 1/last name:

Name 2/First name:

E-Mail Address:

DUNS:

Creditor:

Logical System:

Industry sector:

PCard co.:

Purch. Organization:

Purch. Org. ID:

Country Key:

Region:

Postal Code:

City:

Street:

Building Code:

Restrict Number of Value List Entries To

Start Search Reset

More Search Helps:

OK Cancel

23. Click **Start Search**.

## Supplier: All Values

Supplier: All Values

Name 1 last name:

Name 2 first name:

E-Mail Address:

DUNS:

Creditor:

Logical System:

Industry sector:

PCard co.:

Purch. Organization:

Purch. Org. ID:

Country Key:

Region:

Postal Code:

City:

Street:

Building Code:

Restrict Number of Value List Entries To

BusPartner	Name	Name 2	Country	Region	Postal Code	City	Street	Building	Purch. Organization
310200049	ROOS CLINTON AUTO SUPPLY INC		US	MS	39056	CLINTON	230 CLINTON BLVD		STATE OF MISSISSIPPI - PURCHASING
310200043	ORELLY AUTOMOTIVE STORES INC		US	MO	65801-9464	SPRINGFIELD	233 S PATTERSON		STATE OF MISSISSIPPI - PURCHASING
310200044	ORELLY AUTOMOTIVE INC		US	MO	63179-0098	ST LOUIS			STATE OF MISSISSIPPI - PURCHASING
310200045	ORELLY AUTOMOTIVE INC		US	MS	39208	PEARL	2730 HIGHWAY 90 EAST		STATE OF MISSISSIPPI - PURCHASING
310200046	ORELLY AUTOMOTIVE INC		US	MS	39648	MCCOMB	1402 DELAWARE AVE		STATE OF MISSISSIPPI - PURCHASING
310200030	AUTOZONE MISSISSIPPI INC		US	TN	38101	MEMPHIS			STATE OF MISSISSIPPI - PURCHASING
310200031	AUTOZONE MISSISSIPPI INC		US	MS	39648	MCCOMB	1202 DELAWARE		STATE OF MISSISSIPPI - PURCHASING
310200020	TINCALL AUTOMATION CORPORATION		US	MS	39401	HATTESBURG	208 S 27TH AVENUE SUITE B		STATE OF MISSISSIPPI - PURCHASING

More Search Help:

24. Click  to select the supplier.

## Supplier: All Values

Supplier: All Values

Name 1 last name:

Name 2 first name:

E-Mail Address:

DUNS:

Creditor:

Logical System:

Industry sector:

PCard co.:

Purch. Organization:

Purch. Org. ID:

Country Key:

Region:

Postal Code:

City:

Street:

Building Code:

Restrict Number of Value List Entries To

BusPartner	Name	Name 2	Country	Region	Postal Code	City	Street	Building	Purch. Organization
310200049	ROOS CLINTON AUTO SUPPLY INC		US	MS	39056	CLINTON	230 CLINTON BLVD		STATE OF MISSISSIPPI - PURCHASING
310200043	ORELLY AUTOMOTIVE STORES INC		US	MO	65801-9464	SPRINGFIELD	233 S PATTERSON		STATE OF MISSISSIPPI - PURCHASING
310200044	ORELLY AUTOMOTIVE INC		US	MO	63179-0098	ST LOUIS			STATE OF MISSISSIPPI - PURCHASING
310200045	ORELLY AUTOMOTIVE INC		US	MS	39208	PEARL	2730 HIGHWAY 90 EAST		STATE OF MISSISSIPPI - PURCHASING
310200046	ORELLY AUTOMOTIVE INC		US	MS	39648	MCCOMB	1402 DELAWARE AVE		STATE OF MISSISSIPPI - PURCHASING
310200030	AUTOZONE MISSISSIPPI INC		US	TN	38101	MEMPHIS			STATE OF MISSISSIPPI - PURCHASING
310200031	AUTOZONE MISSISSIPPI INC		US	MS	39648	MCCOMB	1202 DELAWARE		STATE OF MISSISSIPPI - PURCHASING
310200020	TINCALL AUTOMATION CORPORATION		US	MS	39401	HATTESBURG	208 S 27TH AVENUE SUITE B		STATE OF MISSISSIPPI - PURCHASING

More Search Help:

25. Click .

## Create Purchase Order

Smart Number: 58052213 01/21/2014 18:52  
 Smart Number is External

Purchase Order Number: 4800000041

Supplier: 0132000143 ODELLY AUTOMOTIVE STORES INC

Requester: 45504 Sherry Bennett

Recipient: 45504 Sherry Bennett

Location: 18 MS DEPT FINANCE & ADMINISTRATION

Purchasing Organization: State of Mississippi - Purchasing

Purchasing Group: DFA GEN PURCH Show Members

Total Value (Net): 750.00 USD

Internal Note

▼ Item Overview

Details Add Item Copy Paste Duplicate Delete Unlocate Propose Sources of Supply Add Condition Remove Condition Order as Direct Material Process All Items Exercise Option

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Net Value	Order Type	Condition	Delivery Date	Account Assignment
1		Limit			Auto Repair Parts	05504	Overall Limit	750.00	0.00	USD	Expected Value	750.00	0.00			01/31/2014	Cost Center
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				

Total Value (Net)

Total Value (Gross)

Order Save Close Print Preview Check Export Import Park System Information Create Memory Snapshot

26. Click **Details**

## Create Purchase Order

*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				
*		Material	0				0.000		0.00	USD		0	0.00				

Total Value (Net)

Total Value (Gross)

1 Details for Item 1 Auto Repair Parts

General Data Prices and Conditions Account Assignment Notes and Attachments Approval Preview Related Documents Delivery Extended PO History Subcontracting User-Specified Status Payment

Order as Direct Material Item Detail

▼ Basic

Item Number: 1

Configurable Item Number:

Close-Out Status: Initial

Acceptance at Origin:

Item Type: LMI

Description: Auto Repair Parts

Product Category: 05504 Auto-air condn parts

Required: On 01/01/2014

Value Limit: 750.00 USD  Unlimited

Expected value: 750.00 USD

Tax Code:

Subcontracting:

▼ Partner

Details Add Send E-Mail Call Clear

Function	Number	Name
Requester	45504	Sherry Bennett

27. Click **Account Assignment**



## Create Purchase Order

The screenshot shows the SAP Purchase Order creation interface. The 'Item Overview' section displays a table with columns: Line Number, Deleted, Item Type, Item Number, Product ID, Description, Product Category, Quantity, Unit, Gross Price, Currency, Per, Net Price, Net Value, Order Type, Condition, Delivery Date, and Account Assignment Ty. The first row shows '1' as the line number, 'Limit' as the item type, and '1' as the item number. The description is 'Auto Repair Parts 05504'. The quantity is 'Overall Limit 750.00', the unit is '0.00 USD', and the expected value is '750.00'. Below the table, there are fields for 'Total Value (Net)' and 'Total Value (Gross)'. The 'Details for Item 1 Auto Repair Parts' section shows the 'Account Assignment' tab, with a table for 'Cost Distribution' containing one row: '0001' as the number, 'Accounting Line Number', '100.00' as the percentage, 'Cost Center' as the category, and '62120000' as the general ledger account.

28. As required, complete/review the following fields:

Field

R/O/C

Assign Number / 0001

Required

## Create Purchase Order

The screenshot shows the SAP Purchase Order creation interface, focusing on the 'Header' section. At the top, it displays 'Purchase Order Number 4600000041', 'Purchase Order Type Sole Source PO', 'Status In Process', 'Document Date 01/21/2014', 'Total Value (Gross) 750.00 USD', 'Smart Number', and 'Supplier ORELLY AUTOMOTIVE STORES, INC.'. Below this, there are warning messages: 'Enter exactly one partner of type Invoice Recipient' and 'No attachments found for PO. The purchase order type you have selected may require an attachment.'. The 'Item Overview' section is visible at the bottom, showing the same table as in the previous screenshot.

29. Click **Header**.

## Create Purchase Order

Smart Number is External

Purchase Order Number:

Corresponding Novation Purchase Order:

Purchase Order Type:

Organization

Purchasing Organization:

Purchasing Group:   [Show Members](#)

Total Value (Net):  USD

Total Value (Gross):  USD

Tax Value:  USD

Pricing Arrangement:

Ceiling Amount:  USD

Service and Delivery

Status and Statistics

Document Date:

FM Posting Date:

Posting Period:

Commitment Documents: [Display](#)

Closeout Status:

Parked:

Cancelled:

Selective Release Status:

▼ Partner

Function	Number	Name	Phone Number
▪ Requester	45584	<a href="#">Sherry Rennight</a>	
▼ Supplier	3102000143	<a href="#">ORELLY AUTOMOTIVE STORES INC</a>	
▪ Service Agent			
▪ Goods Recipient	45584	<a href="#">Sherry Rennight</a>	
▪ Ship-To Address	285	<a href="#">SoMS</a>	
▪ Invoice Recipient			
▪ Location	18	<a href="#">MS DEPT FINANCE &amp; ADMINISTRATION</a>	

30. Click Number / Invoice Recipient field

## Create Purchase Order

Smart Number is External  
 Purchase Order Number:   
 Corresponding Novation Purchase Order:   
 Purchase Order Type:   
**Organization**  
 Purchasing Organization:    
 Purchasing Group:   [Show Members](#)

Total Value (Net):  USD  
 Total Value (Gross):  USD  
 Tax Value:  USD  
 Pricing Arrangement:   
 Ceiling Amount:  USD

**Service and Delivery**  
**Status and Statistics**  
 Document Date:   
 FM Posting Date:   
 Posting Period:   
 Commitment Documents: [Display](#)  
 Closeout Status:   
 Parked:   
 Cancelled:   
 Selective Release Status:

**Partner**

Function	Number	Name	Phone Number
• Requester	45584	<a href="#">Sherry Rennight</a>	
▼ Supplier	3102000143	<a href="#">O'REILLY AUTOMOTIVE STORES INC</a>	
• Service Agent			
• Goods Recipient	45584	<a href="#">Sherry Rennight</a>	
• Ship-To Address	285	<a href="#">SoMS</a>	
• Invoice Recipient		<input type="checkbox"/>	
• Location	18	<a href="#">MS DEPT FINANCE &amp; ADMINISTRATION</a>	

31. Click  to search for the invoice recipient.

**Business Partner Number: All Values**

Business Partner Number: All Values

Hide Filter Criteria Settings

Business partner: [text box] [arrow]

Search term 1: [text box] [arrow]

Search term 2: [text box] [arrow]

Name 1/last name: [text box] [arrow]

Name 2/First name: [text box] [arrow]

DUNS: [text box] [arrow]

c/o: [text box] [arrow]

Postal Code: [text box] [arrow]

City: [text box] [arrow]

District: [text box] [arrow]

Street: [text box] [arrow]

Building Code: [text box] [arrow]

Floor: [text box] [arrow]

Room Number: [text box] [arrow]

Country Key: [text box] [arrow]

Region: [text box] [arrow]

Restrict Number of Value List Entries To 500

Start Search Reset

OK Cancel

32. As required, complete/review the following fields:

Field

R/O/C

c/o:

Required

### Business Partner Number: All Values

Business Partner Number: All Values

Hide Filter Criteria Settings

Business partner:

Search term 1:

Search term 2:

Name 1/last name:

Name 2/First name:

DUNS:

c/o:

Postal Code:

City:

District:

Street:

Building Code:

Floor:

Room Number:

Country Key:

Region:

Restrict Number of Value List Entries To

Start Search Reset

OK Cancel

33. Click **Start Search**.

### Business Partner Number: All Values

Business partner:

Search term 1:

Search term 2:

Name 1/last name:

Name 2/First name:

DUNS:

c/o:

Postal Code:

City:

District:

Street:

Building Code:

Floor:

Room Number:

Country Key:

Region:

Restrict Number of Value List Entries To

Name of Org	Country	Postal Code	City	Street	Building Code	Floor
SoMS	US	39205	JACKSON	P O BOX 267		

34. Click  to select the invoice recipient address.

### Business Partner Number: All Values

Business partner:

Search term 1:

Search term 2:

Name 1/last name:

Name 2/First name:

DUNS:

c/o:

Postal Code:

City:

District:

Street:

Building Code:

Floor:

Room Number:

Country Key:

Region:

Restrict Number of Value List Entries To

Name of Org	Country	Postal Code	City	Street	Building Code	Floor
SoMS	US	39205	JACKSON	P O BOX 267		

35. Click .

## Create Purchase Order

Smart Number is External  
 Purchase Order Number: 400000771  
 Corresponding Novation Purchase Order:  
 Purchase Order Type: General PO  
 Organization  
 Purchasing Organization: State of Mississippi - Purchasing  
 Purchasing Group: DFA GEN PURCH [Show Members](#)

Total Value (Net): 750.00 USD  
 Total Value (Gross): 750.00 USD  
 Tax Value: 0.00 USD  
 Pricing Arrangement:  
 Ceiling Amount: 0.00 USD **Calculate**  
**Service and Delivery**  
**Status and Statistics**  
 Document Date: 01/28/2014  
 FM Posting Date: 01/28/2014  
 Posting Period: 007  
 Commitment Documents: [Display](#)  
 Closeout Status: None  
 Parked:  
 Cancelled:  
 Selective Release Status: Standard Processing

**Partner**  
[Details](#) [Add](#) [Send E-Mail](#) [Call](#) [Clear](#)

Function	Number	Name	Phone Number
Requester	45584	<a href="#">Sherry Rennight</a>	
Supplier	3102000143	<a href="#">ORELLY AUTOMOTIVE STORES INC</a>	
Service Agent			
Goods Recipient	45584	<a href="#">Sherry Rennight</a>	
Ship-To Address	285	<a href="#">SoMS</a>	
Invoice Recipient	285	<input checked="" type="checkbox"/> <a href="#">SoMS</a>	
Location	18	<a href="#">MS DEPT FINANCE &amp; ADMINISTRATION</a>	

[Order](#) [Save](#) [Close](#) [Print Preview](#) [Check](#) [Export](#) [Import](#) [Park](#) [System Information](#) [Create Memory Snapshot](#)

36. Click **Check**.

## Create Purchase Order

**Create Purchase Order**  
 Purchase Order Number: 400000041 Purchase Order Type: Sole Source PO Status: In Process Document Date: 01/21/2014 Total Value (Gross): 750.00 USD Smart Number  
 Supplier: [ORELLY AUTOMOTIVE STORES INC](#)

Enter exactly one partner of type Invoice Recipient  
 No attachments found for PO. The purchase order type you have selected may require an attachment.

[Order](#) [Save](#) [Close](#) [Print Preview](#) [Check](#) [Export](#) [Import](#) [Park](#) [System Information](#) [Create Memory Snapshot](#)

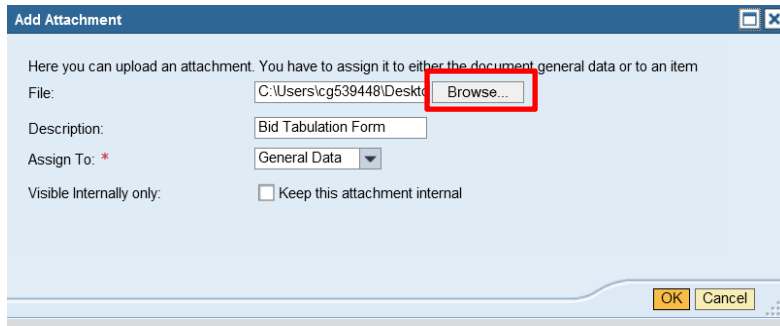
Overview Header Items Notes and Attachments Approval Tracking Supplier Ordering Address  
 General Data Notes and Attachment Output Budget Additional Information Payment Extended PO History Document Totals Synopsis User-Specified Status

**Basic**  
**Identification**  
 Smart Number: 58052213 01/21/2014 18:52  
 Smart Number is External  
 Purchase Order Number: 400000041  
 Corresponding Novation Purchase Order:  
 Purchase Order Type: Sole Source PO  
**Organization**  
 Purchasing Organization: State of Mississippi - Purchasing  
 Purchasing Group: DFA GEN PURCH [Show Members](#)

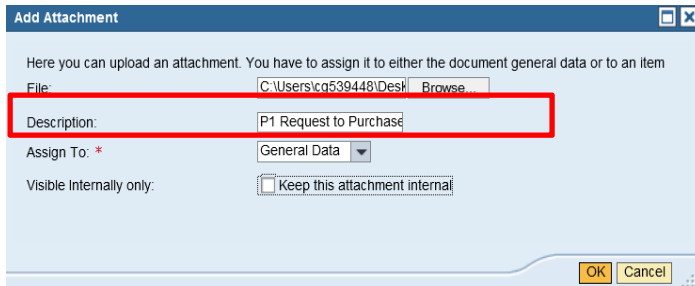
**Currency, Values and Pricing**  
 Currency: USD  
 Total Value (Net): 750.00 USD  
 Total Value (Gross): 750.00 USD  
 Tax Value: 0.00 USD  
 Pricing Arrangement:  
 Ceiling Amount: 0.00 USD **Calculate**  
**Service and Delivery**  
**Status and Statistics**  
 Document Date: 01/21/2014  
 FM Posting Date: 01/21/2014  
 Posting Period: 007  
 Commitment Documents: [Display](#)  
 Closeout Status: None  
 Parked:

37. Click **Notes and Attachments**.

(1) A small window will display; select the **Browse...** button to select a document from your computer.



(2) Enter a description of the document to be added.



(3) Documents must be marked internal or external and must be in compliance with MS Code 27-104-155. NOTE, if the box is **unchecked**, it will be visible to the public for Transparency requirement.

a. Continue to select the **Add Attachment** button to upload all remaining documents such as the Contract, Bid Specs, Justification Letter and Bid Tabulation, advertisement, etc.





(4) Select the **OK** button to return the file to the Notes and Attachment display.

**Add Attachment**

Here you can upload an attachment. You have to assign it to either the document general data or to an item

File: C:\Users\cg539448\Desktop

Description: Bid Tabulation Form

Assign To: \* General Data

Visible Internally only:  Keep this attachment internal

(5) The system will display the added document to the table below

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally
Document Header	Standard Attachment	Bid Tabulation Form	IN077490_Transparency Website Issue.msg	1		<input type="checkbox"/>

(6) Once all the information is entered click **OK**.

48. Click

## Create Purchase Order

**Create Purchase Order** [Help](#)

Purchase Order Number 460000041 Purchase Order Type Sole Source PO Status In Process Document Date 01/21/2014 Total Value (Gross) 750.00 USD Smart Number  
Supplier [SHELLY AUTOMOTIVE STORES, INC](#)

Purchase order with document number 460000041 is correct

[Order](#) [Save](#) [Close](#) [Print Preview](#) [Check](#) [Export](#) [Import](#) [Part](#) [System Information](#) [Create Memory Snapshot](#)

[Overview](#) [Header](#) [Items](#) [Notes and Attachments](#) [Approval](#) [Tracking](#) [Supplier Ordering Address](#)

[General Data](#) [Notes and Attachment](#) [Output](#) [Budget](#) [Additional Information](#) [Payment](#) [Extended PO History](#) [Document Totals](#) [Synopsis](#) [User-Specified Status](#)

[Order and Send Immediately](#)

Latest Output  
Sent On:   
Output Medium:

Additional Output Requested via  
 Printer   
 Fax   
 E-Mail   
 XML

**Document Outputs** [Filter Settings](#)

[Details](#) [Repeat Output](#) [Delete](#)

Status	Changed	Repeated	Manually	Generated On	Generated At	Changed On	Changed At	Medium
The table does not contain any data								

[Order](#) [Save](#) [Close](#) [Print Preview](#) [Check](#) [Export](#) [Import](#) [Part](#) [System Information](#) [Create Memory Snapshot](#)

49. Click [Order](#).

## Display Purchase Order:460000041

**Display Purchase Order:460000041** [Help](#)

Purchase Order Number 460000041 Purchase Order Type Sole Source PO Status Awaiting Approval Document Date 01/21/2014 Total Value (Gross) 750.00 USD Smart Number  
Supplier [SHELLY AUTOMOTIVE STORES, INC](#)

PO 58052213 01/21/2014 18:52 with document number 460000041 has been ordered

[Edit](#) [Close](#) [Print Preview](#) [Refresh](#) [Check](#) [Show my Tasks](#) [Copy](#) [Export](#) [System Information](#) [Create Memory Snapshot](#) [Related Links](#)

[Overview](#) [Header](#) [Items](#) [Notes and Attachments](#) [Approval](#) [Tracking](#) [Supplier Ordering Address](#)

[General Data](#) [Notes and Attachment](#) [Output](#) [Budget](#) [Additional Information](#) [Payment](#) [Extended PO History](#) [Document Totals](#) [Synopsis](#) [User-Specified Status](#)

[Order and Send Immediately](#)

Latest Output  
Sent On:   
Output Medium:

Additional Output Requested via  
 Printer   
 Fax   
 E-Mail   
 XML

**Document Outputs** [Filter Settings](#)

[Details](#) [Repeat Output](#) [Delete](#)

Status	Changed	Repeated	Manually	Generated On	Generated At	Changed On	Changed At	Medium
The table does not contain any data								

[Edit](#) [Close](#) [Print Preview](#) [Refresh](#) [Check](#) [Show my Tasks](#) [Copy](#) [Export](#) [System Information](#) [Create Memory Snapshot](#) [Related Links](#)

50. Click [Close](#).