SMART

Statewide Management, Accounting and Reporting Tool

Participant Guide –

PO325: Entering Supplier Contracts

State of Kansas

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Course Overview

Course Objectives

Upon completion of the course, you will be able to:

- Define basic Supplier Contract Entry terms and concepts
- Explain how Supplier Contract Entry fits into the end-to-end process for Purchasing
- Enter transactional Supplier Contracts into SMART
- Explain the business processes associated with transactional Supplier Contracts in the State of Kansas

Agenda

Today, we will cover the following topics:

- Supplier Contract Entry key terms, concepts and business processes
- Roles involved in Supplier Contract Entry
- The creation of new and copying of existing transactional supplier contracts in SMART

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Participant Notes:

Lesson 1: Understanding Supplier Contracts

Objectives
Upon completion of this lesson, you will be able to:
- Define basic Supplier Contract key terms and concepts
- Describe how Supplier Contracts fit into the end-to-end process for Purchasing
- List the roles involved in Supplier Contract Entry and describe the tasks performed by each role

Key Terms

- **Supplier Contracts**: A binding agreement between the State of Kansas and a vendor created from the Supplier Contract module. Contracts may be added online or may originate from Strategic Sourcing (bid) events. Supplier Contracts are integrated to the purchasing module for purchase order creation.
- **Attachment**: Supplemental information related to a document or transaction

Topic 1: Transactional Supplier Contract Key Concepts

- **Transactional Contract:** The transactional contract data is entered in SMART using the Contract Entry page.

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Participant Notes:

Topic 2: Supplier Contract Entry Process

- *Figure 1* shows how Supplier Contracts fit within the end-to-end processes for Purchasing:

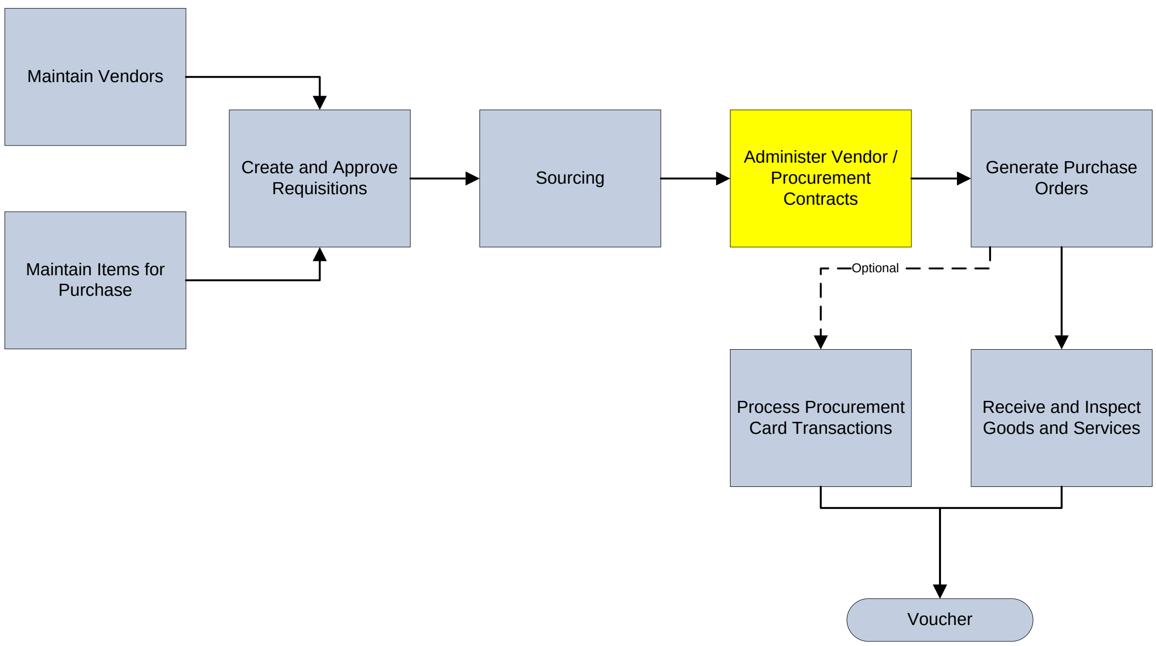

Figure 1. Supplier Contract Entry Process within the End-to-end Purchasing Process

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Participant Notes:

Topic 3: Roles Involved in Supplier Contract Entry

- Roles and tasks that interact with Supplier Contract Entry within SMART:

SMART User Role	Key Activities per Role – Supplier Contract Entry
Central Purchasing Administrator	Maintains the setup tables related to Purchasing, excluding the Items Table Master
Agency Contract Processor	Enters transactional contract data
Central Contract Processor	Enters transactional contract data, creates contract documents, sets up collaborations, and performs contract maintenance

Table 1. Supplier Contract Roles and Tasks

Lesson Review

In this lesson, you learned:

- Supplier Contract Entry key terms and concepts
- How Supplier Contracts fit within the end-to-end processes for Purchasing
- The roles and tasks that interact with Supplier Contract Entry within SMART

Additional Resources

The following are additional resources that provide more detail about the topic we have covered:

- SMART Website – Purchasing – Supplier Contract Entry materials
- State of Kansas Division of Purchases website - http://www.da.ks.gov/purch/

Participant Notes:

Lesson 2: Supplier Contract Entry

Objectives

Upon completion of this lesson, you will be able to:

- Define supplier contract transactional information
- Create a transactional supplier contract in SMART
- Create a new transactional supplier contract by copying an existing transactional supplier contract in SMART

Topic 1: Define Transactional Supplier Contract Information

- **Contract Pages**: Use the Contract Entry pages to enter header and line information for transactional procurement contracts.

State of Kansas - Types of Supplier Contracts

- **Open Ended**: Purchase as many as you want – no cap. No financial limitations.
- **Fixed Cost**: Flat rate fee. Purchasing 10 items = $xx.xx, or purchase services for this project = $xx.xx
- **Not To Exceed**: Capped cost contract. Not to exceed total dollar or quantity amount specified in the contract.

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Participant Notes:

Topic 2: Create Transactional Supplier Contract

Walkthrough/Activity

We will now complete Activity 1 - Walkthrough: Review Supplier Contract Transactional Data in your Activity Guide.

Page Name	Navigation
Contract Entry – Add a New Value	Supplier Contracts → Create Contracts and Documents → Contract Entry

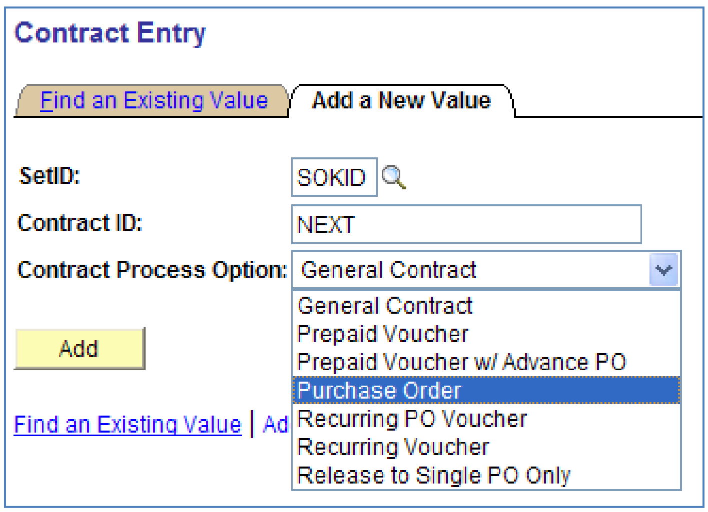

Figure 2. Contract Entry: Contract Process Option

Participant Notes:

Fields	Description
SetID	Default value is 'SOKID'
Contract ID	The Contract ID number is referenced on the purchase order at the line level on the Contract tab page, using the Contract ID field. ***Please do not change the default value of 'NEXT'***. It is State of Kansas best business practive to accept the 'NEXT' default value. When you save the Supplier Contract, SMART auto assigns the next available contract number to the supplier contract.
Contract Process Option **CAUTION!**	***You must choose the option of 'Purchase Order'***. If you do not choose the 'Purchase Order' option, you will NOT be able to reference the Contract ID number on the purchase order when it is created. Once the Contract has been saved, you will not be able to change the Contract Process Option, so ensure that you've chosen the Purchase Order option ***before*** saving the contract in SMART.

Table 2. Contract Entry Page

Participant Notes:

Transactional Contract Page

Figure 3. Transactional Contract Page – top section

Fields	Description
SetID	Default value is 'SOKID'
Copy From Contract link	This link enables you to copy from an existing transactional contract in SMART. The use of this link will be covered later in this course.

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Participant Notes:

Fields	Description
Status CAUTION!	• Auto defaults as '**Open**' status. • **Agencies**: If the contract does NOT require Division of Purchases' approval, change the status from 'Open' to 'Approved' *before* saving the contract. If the contract does require Division of Purchases' approval, leave the status in 'Open'. If approved, Division of Purchases will change the status to 'Approved'. • ***It is important to know that, once a contract has been saved, it cannot be changed or edited at an Agency level.*** If changes need to be made to a saved contract, contact the Central Division of Purchases. • **'Approved'** indicates the contract is available to be used on a Requisition and Purchase Order. • '**Closed**' indicates the contract has been closed by the Central Division of Purchases. • '**On-Hold**' indicates the Central Division of Purchases has placed the contract on hold.
Participant Notes:	

Fields	Description
Contract ID	Auto defaults as 'NEXT'. The next Contract ID number is auto generated, assigned, and displayed when the transactional contract is saved (using the Save button). All contracts will be auto-numbered in SMART.
Administrator	Click the Look-Up icon to view the Look Up Administrator search page. Enter or select the name of the Buyer who is the Contract Administrator for the transactional contract. Most often this will be yourself, however there may be occasions when you are entering the contract on behalf of someone else. The Contract Administrator must be assigned a Buyer role in SMART for their name to appear in the list of available options for the Administrator field.
Add a Document button	This button is not used by Agency staff, it is used by Central Division of Purchases staff to create contract documents within the SMART document management system.

Table 3. Transactional Contract – Contract Page

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Participant Notes:

Header Information

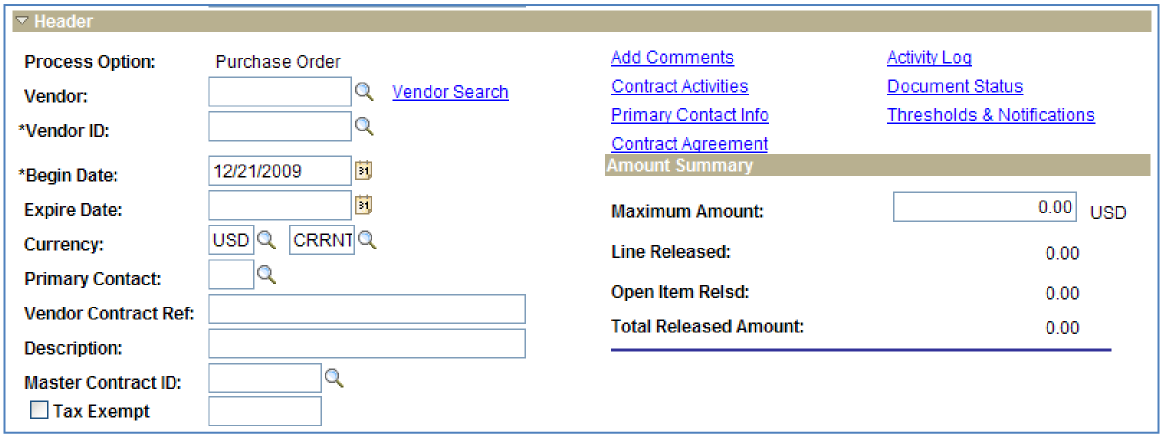

Figure 4. Transactional Contract Page – Header Section

Fields	Description
Process Option	'Purchase Order' ***MUST*** be the option selected.
Vendor	Use the Vendor Look-up button to access the Look Up Vendor page, or enter the Vendor name into the Vendor field.
Vendor Search link	Use the Vendor Search link to access and use the Vendor Search page to locate existing vendors in SMART.
Vendor ID	'Use the Vendor ID Look-up button to access the Look Up Vendor ID page, or enter the Vendor ID into the Vendor ID field.

Participant Notes:

Fields	Description
Begin Date	If the supplier contract is a result of a purchase requisition such as a Prior Authorization requisition, then the Begin Date MUST be equal to or prior to the date the purchase requisition was created in SMART. This does NOT represent the actual contract start date.
Expire Date	The Expire Date field represents the current expiration date of the contract. **Note**: This date may be edited in the future if the expiration date changes. For example a contract is set to expire, and it is renewed.
Currency	Auto defaults – please do not change this information.
Primary Contact	Name of the primary contact at the vendor for the contract. (Sourced from the vendor file in SMART. This contact information is maintained by Central).
Vendor Contract Ref	May be used to reference a Vendor Contract number or other type of reference number.
Description	30 character field. Use this field to enter a description for the transactional contract. **Note**: You should use a naming convention that is easily identified. The Description value entered in this field appears in the contract information that is posted on the Division of Purchases website.
Tax Exempt	Optional entry field. Use this field to enter the Agency Tax Exemption number if desired.

Table 4. Transactional Contract Page – Header Section

Participant Notes:

Contract Term/Renewals

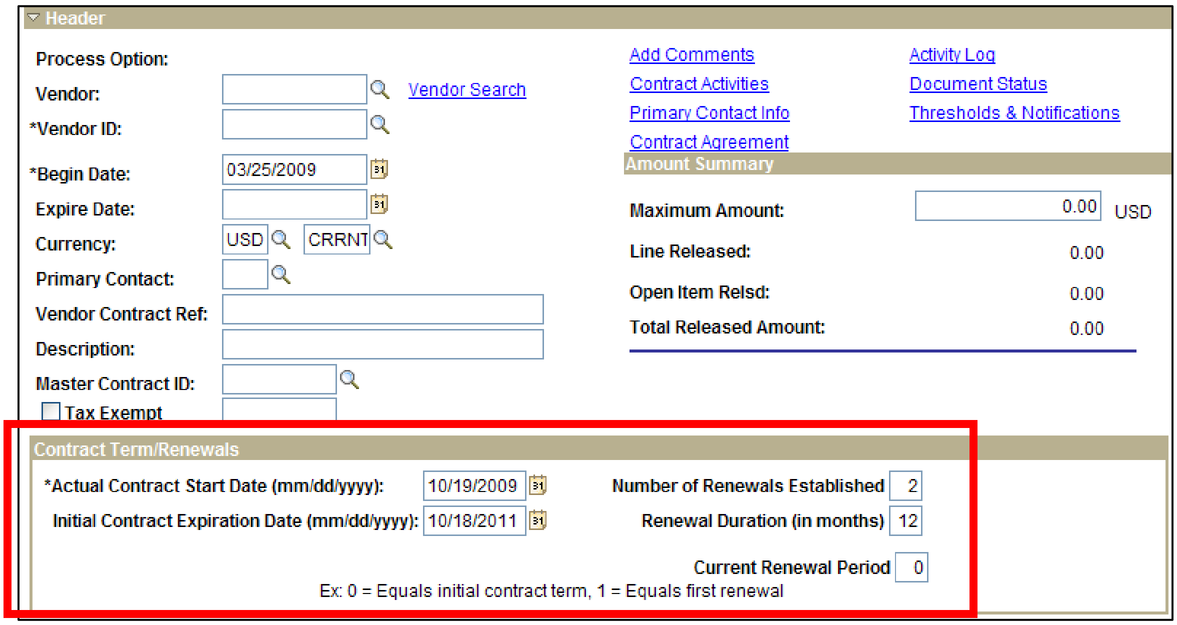

Figure 5. Transactional Contract Page – Contract Term/Renewals Section

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Participant Notes:

Fields	Description
Actual Contract Start Date (mm/dd/yyyy)	Click the Calendar button to access the calendar and select the actual start date, or enter the actual start date for the contract. This date represents the contract start date. Once entered, this date should not change. **Note**: When creating a new contract, SMART auto defaults the current date in this field, therefore you need to edit the default date if applicable.
Initial Contract Expiration Date (mm/dd/yyyy)	Enter the first expiration date for the contract. **Note**: This field represents the initial (first) expiration date for the contract. Despite contract renewals, this field's date entry will never change, it will always remain the same.
Number of Renewals Established	Enter the number of contract renewals established for the contract with the vendor.
Renewal Duration (in months)	Enter the number of months (duration) for the new contract renewal period.
Current Renewal Period	If the contract contains renewal options, change the **Current Renewal Period** field in the Contract Term/Renewals section upon each renewal period. SMART does not calculate this field. This field is a manual data entry field.

Participant Notes:

Fields	Description
Ex: 0 = Equals initial contract term, 1 = Equals first renewal	Use this helpful example to calculate and enter the correct values within the Contract Term/Renewals section on the Contract Entry page. The initial contract will show “0” in the Current Renewal Period field. When the contract is renewed the first time, this field value should be changed to “1”. When renewed the second time, the field value should be changed to “2”, and so on.

Table 5. Transactional Contract Page – Contract Term/Renewals Section

Order Contract Options

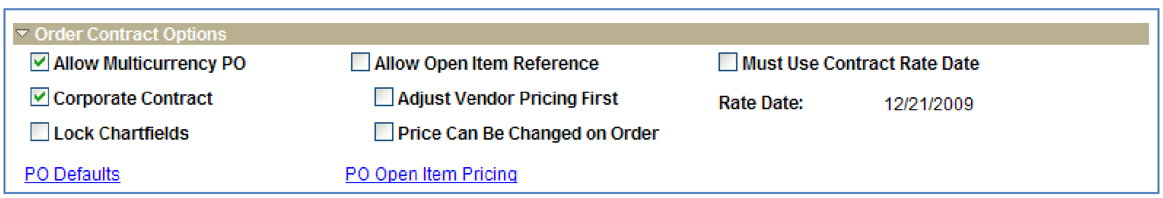

Figure 6. Transactional Contract Page – Order Contract Options

Fields	Description
Allow Multicurrency PO	Defaults as selected. Please do not change this default setting.

Participant Notes:

Fields	Description
Corporate Contract **CAUTION!**	The Corporate Contract Checkbox defaults as checked (selected). The Corporate Contract Checkbox (when selected) enables ALL agencies to have access to a contract in SMART. The Corporate Contract Checkbox is to be selected (checked) only by Central Division of Purchases staff for contracts available to all agencies. ***<u>Agencies</u>:* *Please deselect (uncheck) the Corporate Contract Checkbox when creating contracts for your agency.*** If you do not deselect the Corporate Contract Checkbox, ALL other agencies will have access to your contracts and will be able to issue purchase orders against them.
Lock Chartfields	The State of Kansas is not using this functionality. Do not select this checkbox.

Participant Notes:

Fields	Description
Allow Open Item Reference **CAUTION!**	Select this checkbox to add any item, add any number of items, or to add no line items to the contract. **For example**: This check box would be used especially for catalog type contracts where a specific line item is not defined. If this checkbox is not selected when creating the contract, the contract ID number will NOT be able to be referenced on a requisition or a purchase order, unless the specific contract line item is used on the requisition or the purchase order. **For example**: Your agency wants to create requisitions or purchase orders which reference the contract ID. If you do NOT select the 'Allow Open Item Reference checkbox', your agency will be limited to only the specific line items which are listed on the contract in SMART. ***Agencies must ALWAYS select the Allow Open Item Reference checkbox when creating a supplier contract.*** **Note**: The use of this checkbox is related to the use of the 'Price Can Be Changed on Order' checkbox.
Adjust Vendor Pricing First	The State of Kansas is not using this functionality. Please do not select this checkbox.

Participant Notes:

Fields	Description
Price Can Be Changed on Order	Select this checkbox, if you want to be able to change the SMART system calculated prices on purchase orders for this contract. ***This field setting applies only to open items that are referenced on a purchase order when the "Allow Open Item Reference" checkbox is selected.*** If you do not select this checkbox, the price fields on the purchase order are unavailable for entry or editing.
Must Use Contract Rate Date	***The State of Kansas is not using this checkbox*** (as it relates to multicurrency's). Please do not select this checkbox.
Rate Date	SMART auto defaults this value (This is the date the transactional contract is created in SMART and it relates to multicurrency's).

Table 6. Transactional Contract Page – Order Contract Options

PO Defaults Link

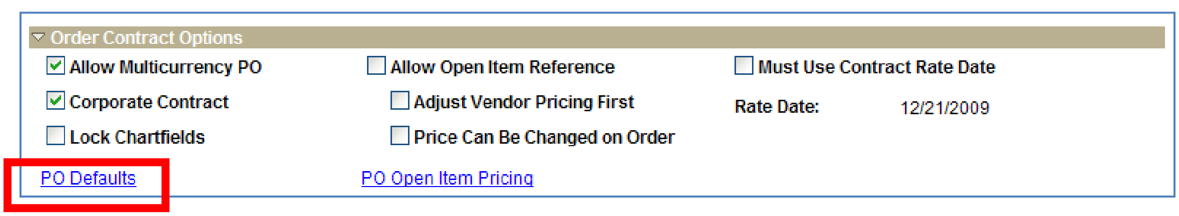

Figure 7. Transactional Contract Page – Order Contract Options: PO Defaults Link

Participant Notes:

Clicking the PO Defaults link opens the PO Defaults page:

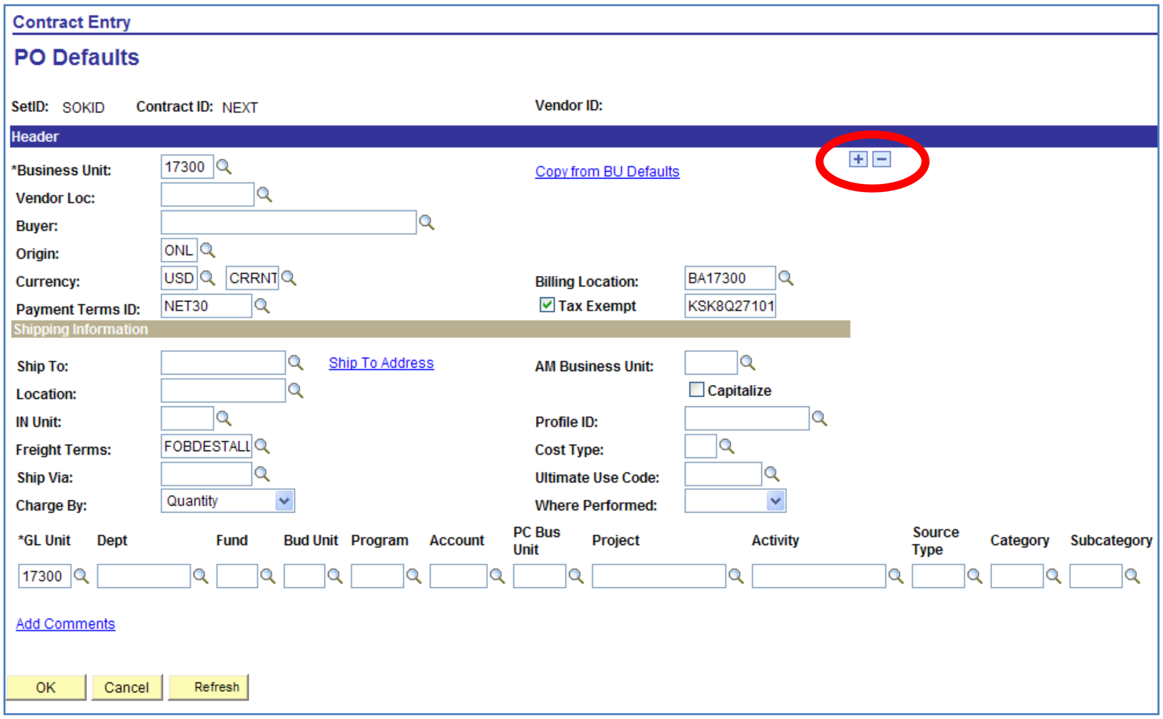

Figure 8. PO Defaults page

- The **PO Defaults page** is used to create a contract for multiple agencies. This is NOT used to create a statewide contract. Using the **PO Defaults page** allows you to add lines for specific business units (agencies) to use the contract.
- The Business Unit number defaults, however **you MUST select a Buyer**. For agency specific contracts issued by **the Central Division of Purchases, the Buyer** selected is the agency Buyer.
- ***The Buyer field MUST be entered on the PO Defaults page.***
- Validate all defaulted information is correct, and modify if necessary before clicking the **OK** button.

Participant Notes:

Add Items From

Agencies will not use the Catalog or Item Search links. Both these links look at the Item Master, which contains only items that are on a statewide contract. The Add Items From section containing the Catalog link and the Item Search link are for the use of the Division of Purchases only.

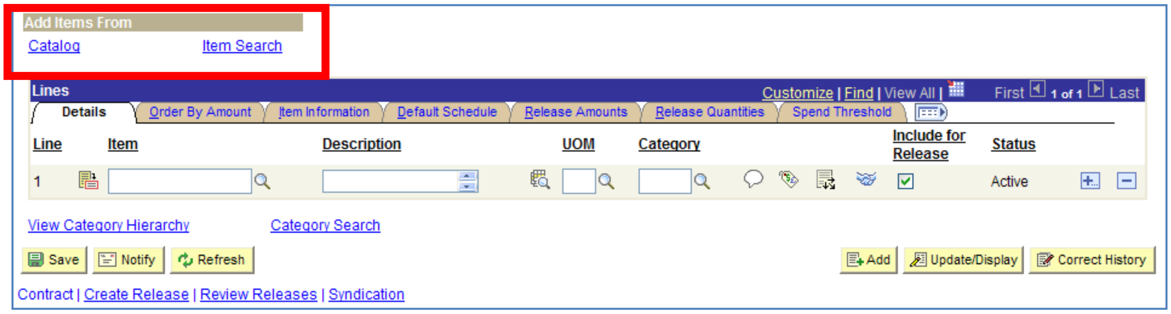

Figure 9. Transactional Contract Page – Add Items From Section

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Participant Notes:

Fields	Description
Catalog link	***Division of Purchases use only. Agencies should not use this link.*** Clicking the Catalog link opens the Order by Catalog page. Use the Order by Catalog page to browse and locate items within the SMART item catalogs.
Item Search link	***Division of Purchases use only. Agencies should not use this link.*** Clicking the Item Search link opens the Item Search criteria page. Use the Item Search criteria page to search for items listed within the item catalogs in SMART.

Table 7. Transactional Contract Page – Add Items From Section

Lines

Note: The State of Kansas is not using the 'Order by Amount', 'Default Schedule', 'Release Amounts', 'Release Quantities', or 'Spend Threshold' tab pages.

Details Page

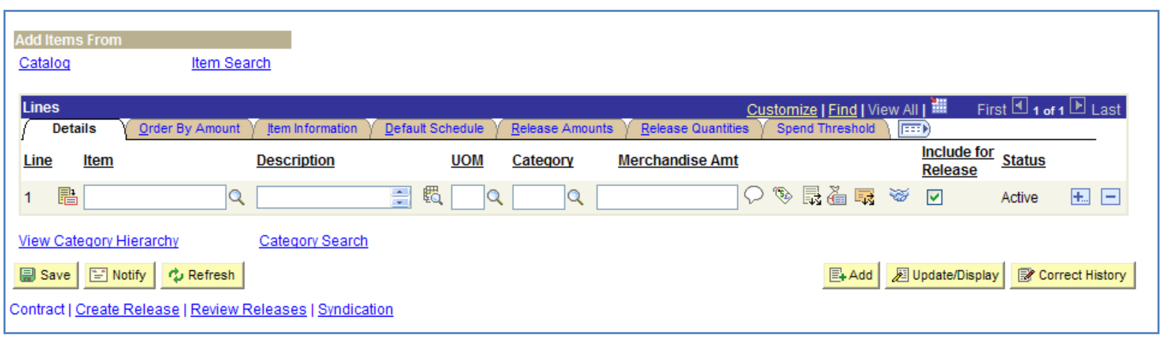


Figure 10. Transactional Contract Page – Lines Section – Details Page

Participant Notes:

Fields	Description
Line Details button	Click the Line Details button to open the Details for Line (number) page. The use of the Details for Line (number) page is covered later in this course.
Item	***Central Division of Purchases***: Use the Item field to enter the item number from the Item Master
Description	Use the Description field to enter the item description. The Description field allows a maximum of 254 characters (including spaces and punctuation).
Items… button	***Central Division of Purchases***: Click the Items… button to open the Item Search criteria page for the Item Master
UOM	Use the UOM field to enter the item's unit of measure. For example: EA = Each.
Category	Use the Category field to enter the item's category code
Merchandise Amount	If you select an item from the item master file, SMART auto populates the Merchandise Amount (price) when you save. Therefore if you select an item from the item master file, you do not need to enter a value into this field.
Line Comments button	Click the Line Comments button to open the Comments for Line (number) page. Use the Line Comments page to add specific instructions or specifications for a particular line item.
Price Adjustments button	The State of Kansas is not using Price Adjustments.

Participant Notes:

Fields	Description
PO Distribution Details button	Click the PO Distribution Details button to open the PO Distributions for Line (number) page. Use this page to enter Distribution details, and asset information.
Contract Agreement button	The State of Kansas is not using the Contract Agreements button.
Include for Release checkbox	The State of Kansas is not using this checkbox.
Status	The default value is 'Active'. The Status options are 'Active' or 'Cancelled'.
+ button	Use the + button to add multiple new rows at row (number)
- button	Use the – button to delete row (number)

Table 8. Transactional Contract Page – Lines Section – Details Page

Details for Line (number) Page

Click the **Line Details button** on the Details page to access the **Details for Line (number) page**.

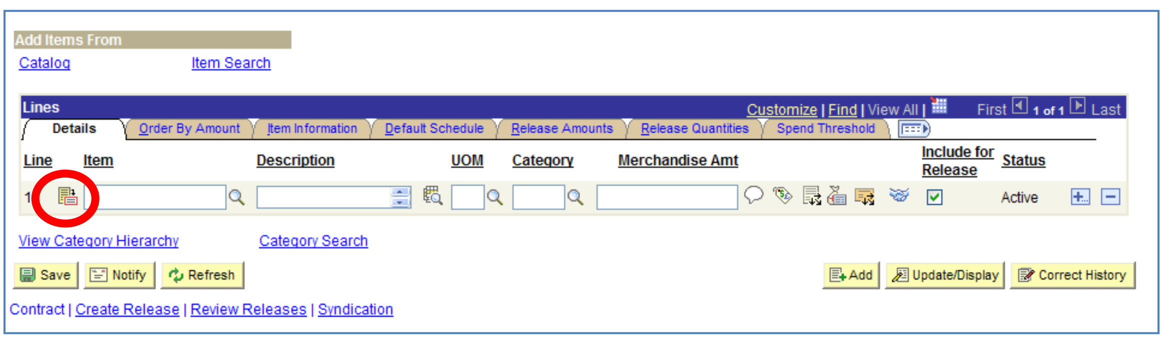


Figure 11. Transactional Contract Page – Lines – Details – Line Details button

Participant Notes:

Page Name	Navigation
Contract Entry - Details for Line (Number)	Supplier Contracts → Create Contracts and Documents → Contract Entry → Details → Lines Details button

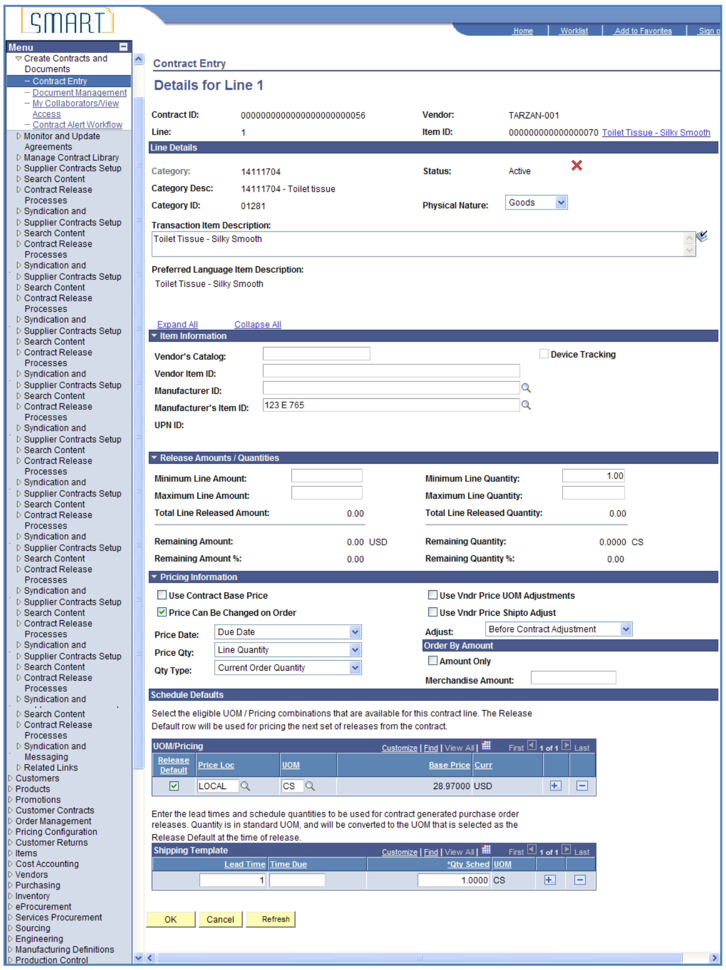


Figure 12. Details for Line (number) page

Participant Notes:

UOM/Pricing Section

The **Price Loc** (Price Location), **UOM** (Unit of Measure), and **Base Price** fields MUST be populated on the **Details for Line (number)** page in order to be able to reference the Contract ID number on a purchase order, or on a purchase requisition in SMART. Additionally, if this information is not populated on the supplier contract, SMART will not allow you to save the contract until this information has been entered.

Fields	Description
Price Loc	Price Location. Use the Price Loc field to enter the vendor location code. This value may default based on the vendor chosen.
UOM	Unit of Measure. Use the UOM field to enter the unit of measure for the item. **Note**: If you entered the UOM on the Details page, this value will default based on the value you entered on the Details page.
Base Price **CAUTION!**	Use the Base Price field to enter the base price per unit of measure for the item. You need to enter a price as accurate as possible; however, the base price will be able to be overridden on the purchase order in SMART. ***Both the 'Allow Open Item Reference' checkbox and the 'Price Can be Changed on Order' checkbox MUST be selected if you want to be able to override the base price of the item on a requisition or a purchase order.*** **Note**: If you do not know the Base Price value, enter a Base Price of $1.00.

Table 9. Details for Line (number) page – UOM/Pricing Section

Participant Notes:

Shipping Template Section

If you are creating a supplier contract using a *line item*, then you MUST populate a numerical value in the *** Qty Sched** field.

Fields	Description
* Qty Sched	Quantity Scheduled. Use this field to enter the numerical value of the quantity. **Note**: You must have a numerical value in this field in order to be able to save the contract.

Table 10. Details for Line (number) page – Shipping Template Section

Item Information Page

Page Name	Navigation
Contract Entry – Item Information	Supplier Contracts → Create Contracts and Documents → Contract Entry → Item Information

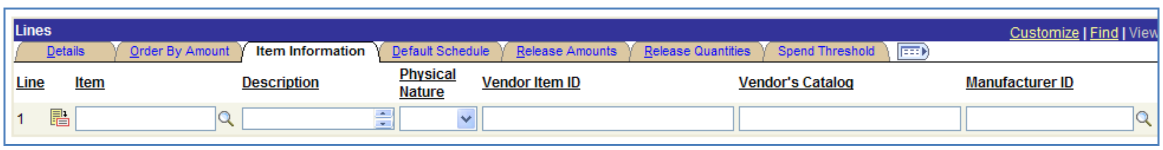


Figure 13. Transactional Contract Page – Lines Section – Item Information Page (left side)

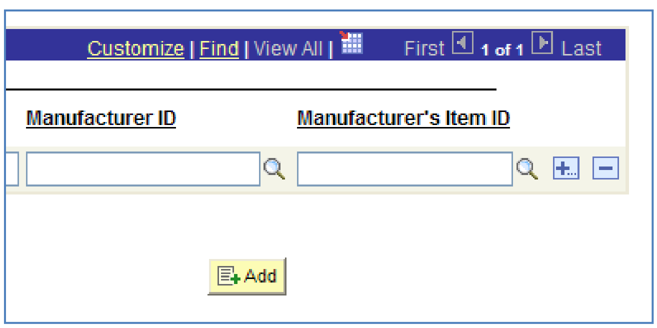


Figure 14. Transactional Contract Page – Lines Section – Item Information Page (right side)

Participant Notes:

Note: The State of Kansas is not using the **Release** functionality in SMART.

Fields	Description
Line Details button	Click the Line Details button to open the Details for Line (number) page
Item	**Central Division of Purchases**: Use the Item field to enter the item number from the Item Master
Description	Use the Description field to enter the item description. This field allows for the entry of 254 characters (including spacing and punctuation).
Physical Nature	• Goods (items) • Services
Vendor Item ID	Use the Vendor Item ID field to enter the vendor's item ID number. For example: Enter the vendor's stock number.
Vendor's Catalog	Use the Vendor's Catalog to enter the vendor's catalog details
Manufacturer ID	Use the Manufacturer ID field to enter the Manufacturer's ID for the item. If desired, use the Lookup button to search for the Manufacturer's ID. **Note**: Agencies need to contact Division of Purchases to add manufacturers to the list in SMART.
Manufacturer's Item ID	Use the Manufacturer's Item ID field to enter the manufacturer's item ID. While this has a look up field, you may enter any value.
+ button	Use the + button to add multiple new rows at row (number)
- button	Use the – button to delete row (number)

Table 11. Transactional Contract Page – Lines Section – Item Information Page

Participant Notes:

Contract Page – Links and buttons

Page Name	Navigation
Contract Entry	Supplier Contracts → Create Contracts and Documents → Contract Entry

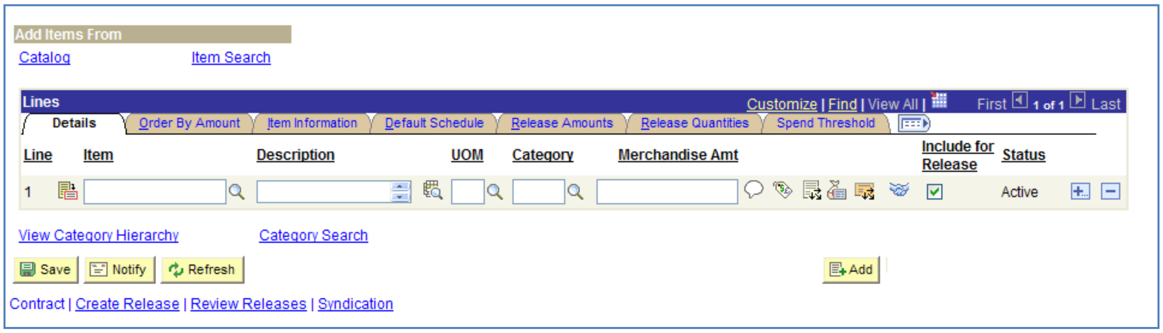


Figure 15. Transactional Contract Page – Bottom of page

Fields	Description
View Category Hierarchy link	State of Kansas Agencies do NOT use this link. ***This link is to be used by Central Division of Purchases only***.
Category Search link	State of Kansas Agencies do NOT use this link. ***This link is to be used by Central Division of Purchases only***.
Add button	Use the Add button to add a new contract. **Note**: You must save the current contract <u>*before*</u> you can begin a new contract. Refer to the Save button for additional information.

Table 12. Transactional Contract Page – Bottom of page

Participant Notes:

Add Comments link

Page Name	Navigation
Contract Entry – Header Comments	Supplier Contracts → Create Contracts and Documents → Contract Entry – Header Comments link

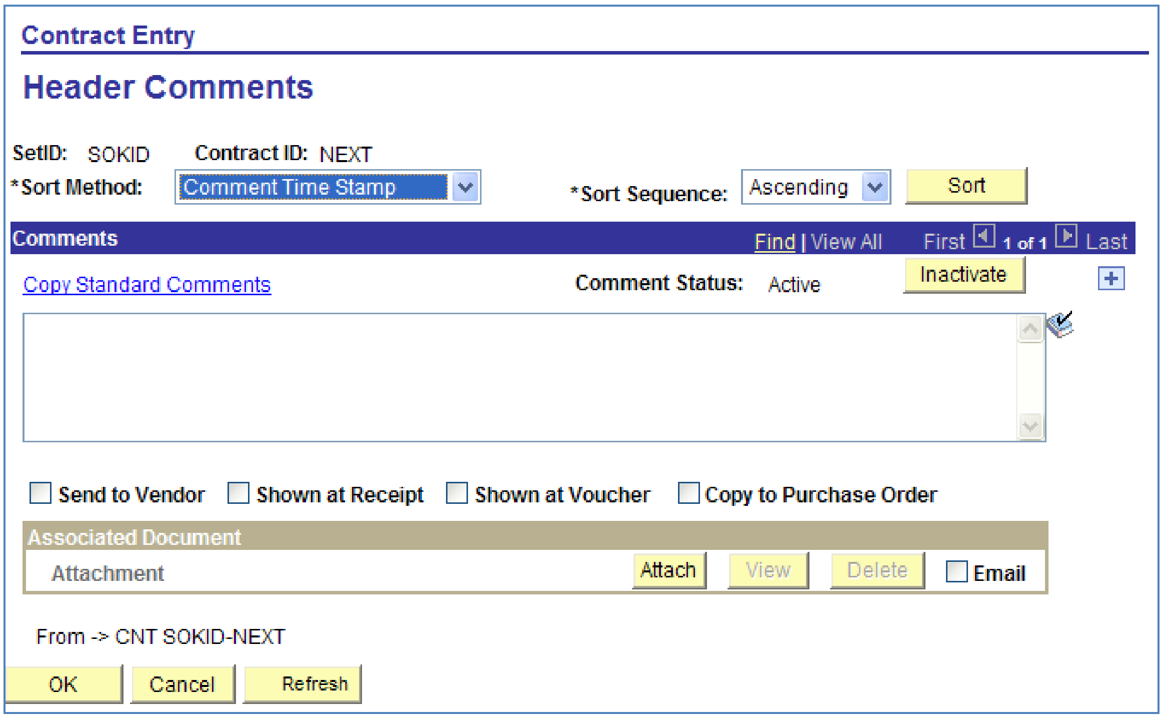


Figure 16. Header Comments page

Use the Comments page to add comments that pertain to the entire supplier contract.

Note: State of Kansas agencies are NOT using the **Standard Comments** functionality.

Participant Notes:

Fields	Description
Sort Method	• **Comment Time Stamp** - Select to sort the comments by the time stamp that the system assigns when comments are created. • **Vendor Flag** – ***Do not use this option (Use PO Comments).***
Sort Sequence	• Ascending • Descending
Sort button	After selecting the Sort Method and Sort Sequence, click the Sort button to perform the sort according to sort method and sequence chosen.
Comment Status	• **Active –** An 'active' comment is able to be viewed using the sort methods • **Inactive** – 'Inactive' comments are stored for archive purposes, and they are not able to be viewed using sort methods for current active comments. You must change your sort criteria if you wish to view inactive comments. To view Inactive comments, deselect the checkbox next to "Retrieve Active Comments Only", then select the Retrieve button.
Inactivate button	Use the Inactivate button to change the status of a comment from 'Active' to 'Inactive'.

Participant Notes:

Fields	Description
+ button	Use the + button to add a new comment.
Spellcheck button	Use the spellcheck button to spell check the comment text.
Send to Vendor checkbox	***Do not use this checkbox***. Based on the State of Kansas business process in SMART, comments on the Contract Header cannot be sent to the vendor. Use PO Comments to send to vendor.
Shown at receipt checkbox	***Do not use this checkbox***. Based on the State of Kansas business process in SMART, comments on the Contract Header cannot be shown at the receipt. Use PO Comments to include comments at the receipt.
Shown at voucher checkbox	***Do not use this checkbox***. Based on the State of Kansas business process in SMART, comments on the Contract Header cannot be shown at the voucher. Use PO Comments to include comments on the voucher.
Copy to Purchase Order checkbox	***Do not use this checkbox***. Based on the State of Kansas business process in SMART, comments on the Contract Header cannot be shown on the PO. Use PO Comments to include comments.
Associated Document: Attachment	Enables you to attach documents to the header level of the transactional contract in SMART. For example: A contract document that your agency created outside the SMART system or a copy of a vendor contract that your agency signed.

Participant Notes:

Fields	Description
Attach button CAUTION!	Click the attach button to browse, locate and upload file(s) from your local server to the header level of the transactional contract in SMART. ***It is important to know that you need to add attachments to the transactional contract BEFORE saving the transactional contract. Once you have saved the contract, you are unable to add, change or delete file attachments.*** File attachments stored at the header level of a transactional contract are NOT able to be viewed by the public on the Department of Administration website. In other words, only transactional contract data entered in SMART on the Contract Entry page(s) is able to be viewed on the website.
View button	The View button is enabled once an attachment has been uploaded to the header level of the transactional contract in SMART. Click the View button to open and view the document (in the application in which it was created, for example: Microsoft Word or Excel).
Delete button	The Delete button is enabled once an attachment has been uploaded to the header level of the transactional contract in SMART. Click the Delete button to delete (remove) an attachment from the transactional contract.

Participant Notes:

Fields	Description
Email checkbox	***Do not use this checkbox***. Based on the State of Kansas business process in SMART, attachments on the Contract Header cannot be emailed.
OK button	Once you have completed all information and comment text on the Header Comments page, click the OK button. Clicking the OK button returns you to the Contract page. When you return to the Contract page, the Add Comments link name changes to Edit Comments. Clicking the Edit Comments link returns you to the Header Comments page, where you can view and edit the comments, and change the file attachments as necessary. Click the OK button to save any changes you make on the Header Comments page.
Cancel button	Click the Cancel button to return to the Contract page without saving changes you made to the Header Comment page or text.
Refresh button	Use the Refresh button to refresh the Header Comment page and comment text.

Table 13. Header Comments page

Participant Notes:

Contract Activities link

Page Name	Navigation
Contract Entry – Contract Activities	Supplier Contracts → Create Contracts and Documents → Contract Entry → Contract Activities link

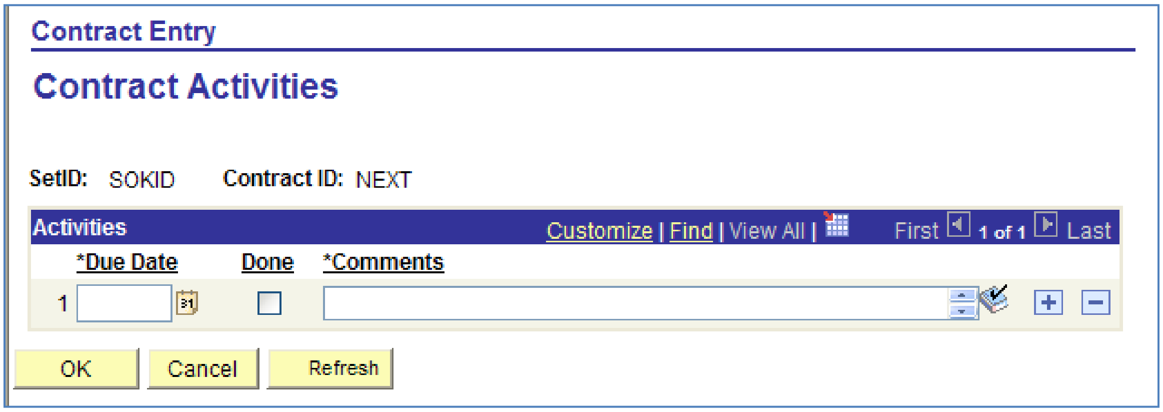


Figure 20. Contract Activities Page

- Provides notekeeping and reporting functionality for agencies. For example: Agencies can choose to use the Contract Activities function to keep track of activities that need to occur on a contract. Agencies must enter these activities before saving the contract.
- ***It is important to know that the Contract Activities page does not contain any functionality in SMART, i.e. SMART does not provide email notifications, or worklist items for any information entered on this page***.

Participant Notes:

Primary Contract Info link

Page Name	Navigation
Vendor Contact Information	Supplier Contracts → Create Contracts and Documents → Contract Entry → Primary Contact Info link

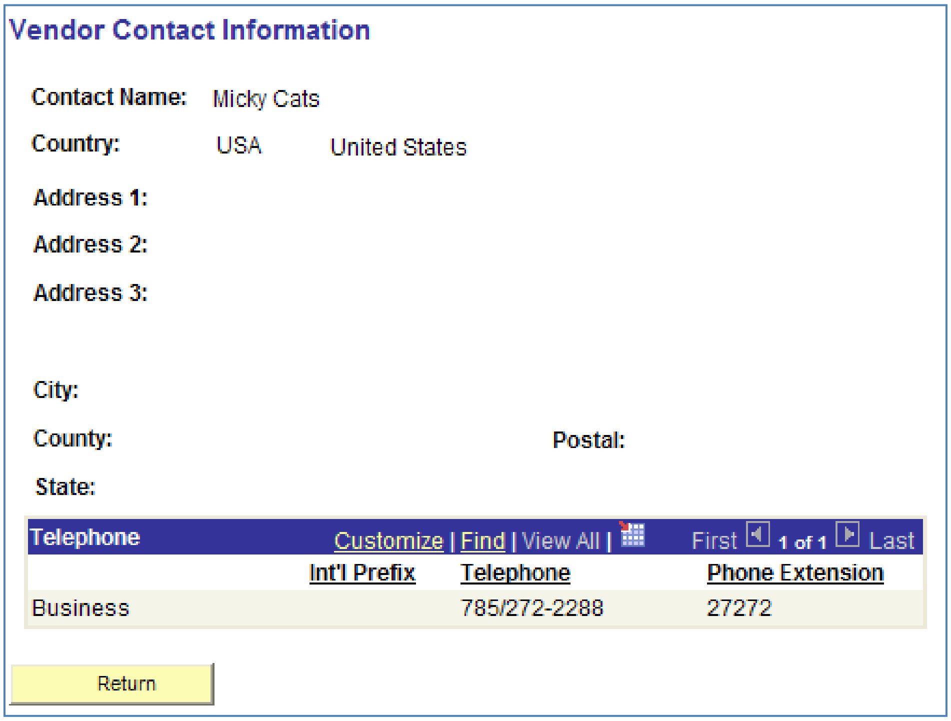


Figure 21. Vendor Contract Information Page

The **Vendor Contact Information** page contains the contact details, including phone number for the vendor's primary contact for the contract (this information is sourced from the Vendor file, and is maintained by Central).

Participant Notes:

Contract Agreement link
The State of Kansas has elected not to utilize the Contract Agreement functionality. Please do not use this link.

Activity Log link

Page Name	Navigation
Contract Entry – Activity Log	Supplier Contracts → Create Contracts and Documents → Contract Entry → Activity Log link

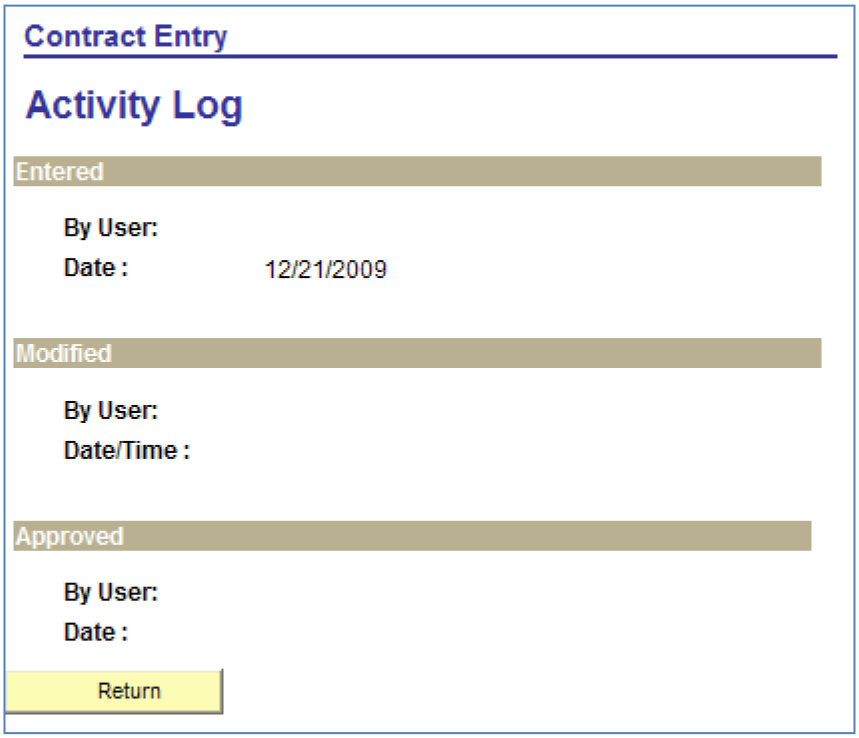


Figure 22. Activity Log Page

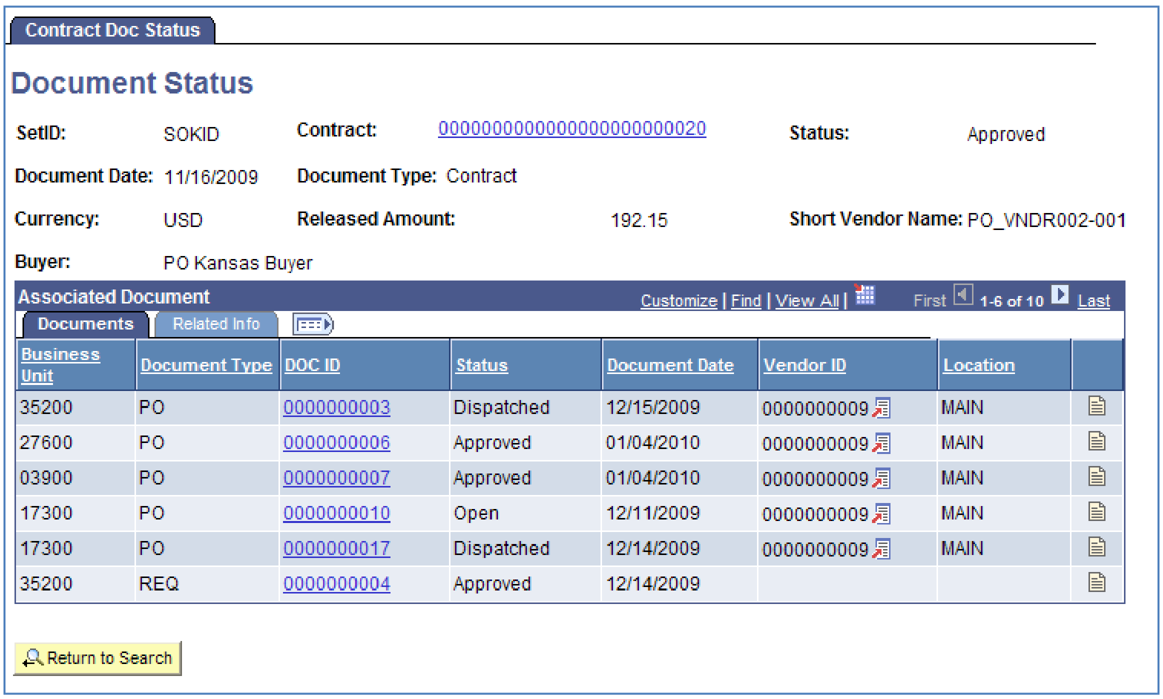
The Activity Log page tracks and keeps history for the most recent changes made to the transactional contract in SMART.

Participant Notes:

Document Status link

Page Name	Navigation
Contract Doc Status – Document Status	Supplier Contracts → Create Contracts and Documents → Contract Entry → Document Status link

Clicking the Document Status link opens the Document Status page where you are able to locate and click on links to navigate to purchase orders or purchase requisitions which are related to the specific transactional supplier contract in SMART.



Contract Doc Status

Document Status

SetID: SOKID Contract: 0000000000000000000000020 Status: Approved

Document Date: 11/16/2009 Document Type: Contract

Currency: USD Released Amount: 192.15 Short Vendor Name: PO_VNDR002-001

Buyer: PO Kansas Buyer

Associated Document Customize | Find | View All | First 1-6 of 10 Last

Documents Related Info

Business Unit	Document Type	DOC ID	Status	Document Date	Vendor ID	Location	
35200	PO	0000000003	Dispatched	12/15/2009	0000000009	MAIN	
27600	PO	0000000006	Approved	01/04/2010	0000000009	MAIN	
03900	PO	0000000007	Approved	01/04/2010	0000000009	MAIN	
17300	PO	0000000010	Open	12/11/2009	0000000009	MAIN	
17300	PO	0000000017	Dispatched	12/14/2009	0000000009	MAIN	
35200	REQ	0000000004	Approved	12/14/2009			

Return to Search

Figure 23. Contract Doc Status – Documents Page

Participant Notes:

Thresholds & Notifications link

The State of Kansas has elected not to utilize Thresholds and Notifications. Please do not use this link.

Amount Summary

Page Name	Navigation
Contract Entry	Supplier Contracts → Create Contracts and Documents → Contract Entry → Amount Summary Section

Fields	Description
Maximum Amount	• Use this field to enter the maximum contract amount (contractual obligation). • Use of this field is contingent on the type of contract being created. Examples of when this field should be used: The creation of a firm fixed cost contract, or a Not-To-Exceed cost contract. • ***This field is NOT used for an open ended contract.***
Line Released	Displays the total released amount of the contract, which is the open item amount plus the total of the line amounts. This amount is updated during the PO Calculations process, online purchase order creation, and the Account Payables Batch Voucher process when the contract is referenced.

Participant Notes:

Fields	Description
Open Item Relsd	Displays the amount that is released for open items in an open item contract. This information appears only if the contract is referenced on a purchase order using open item referencing. This amount is updated during the PO Calculations process or online purchase order creation.
Total Released Amount	• A control total line associated with the Maximum Amount line. • The Total Released Amount accumulates the amount for all purchase orders issued using the specific Contract ID. • Business procurement card transactions without a purchase order will not accumulate (in the total released amount) on contract. • If the contract contains a maximum amount, and you wish to use a business procurement card for the purchases, a purchase order will also need to be created in order to accumulate the total released amount accurately.

Table 15. Contract Page – Amount Summary Section

Participant Notes:

Save Button

Fields	Description
Save button CAUTION!	Verify all supplier contract information is correct and all attachments have been attached. If the contract DOES NOT require Division of Purchases' approval, change the **Status** to 'Approved' ***before*** clicking the **Save** button. If the contract DOES require Division of Purchases' approval, leave the status in 'Open'. If approved, Division of Purchases will change the status to 'Approved'. ***It is important to know that once an Agency has saved a transactional contract in SMART, the transactional contract is unable to be modified or edited by the Agency in any way.*** When an Agency approves and saves a transactional contract, the contract (including attachments) is locked by SMART. The Agency is unable to edit or update the transactional contract once the 'Save' button has been clicked. If an Agency determines that a transactional contract needs to be changed after it has been saved, the Agency must contact the Central Division of Purchases for assistance.

Table 16. Contract Page – Save Button

Participant Notes:

Fields	Description
Notify Button Notify *Please refer to the screenshots following this table* **CAUTION!** **CAUTION!**	If the contract requires Division of Purchases' approval, the contract will be saved in an 'Open' status. Once saved, click on the 'Notify' button which will open the '**Send Notification**' page. You may either type the appropriate Division of Purchases Buyer's e-mail in the 'To:' field or click on the '**Lookup Recipient' link** to search for the Buyer. Enter the 'Subject' and any desired 'Message'. ***Please do NOT change the 'Template Text' content.*** When using the 'Lookup Recipient', enter the Division of Purchases Buyer's last name and click the '**Search**' button. Select the Buyer by selecting the '**To**' box, then clicking the **'Add to Recipient List'** button. Click the **OK** button to return to 'Send Notification' page. By selecting the **'Delivery Options' link**, you will be able to choose the **Recipient Options**. This allows you to determine whether to place this notification on the Buyer's worklist and/or e-mail. ***Both the 'Worklist' and 'Email' checkboxes default as selected. Please do not change the default selections***. Click the **OK** button to return to 'Send Notification' page. Clicking the **OK button** on the 'Send to Notification' page notifies the Buyer that your contract requires review.

Table 17. Contract Page – Notify Button

Participant Notes:

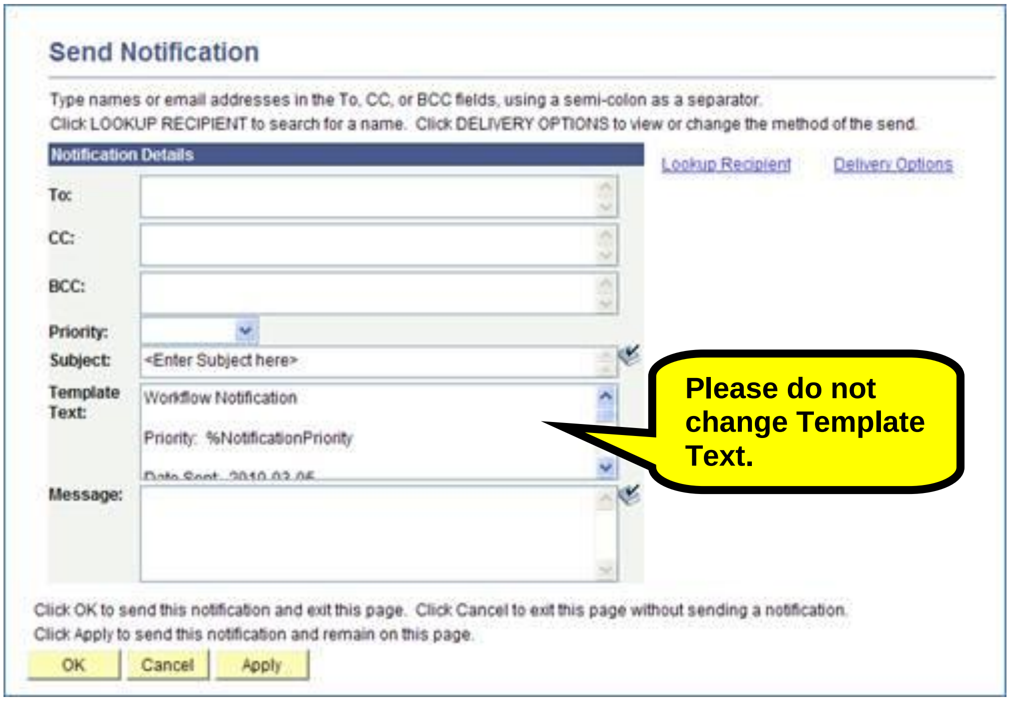


Figure 24. Send Notification Page

Participant Notes:

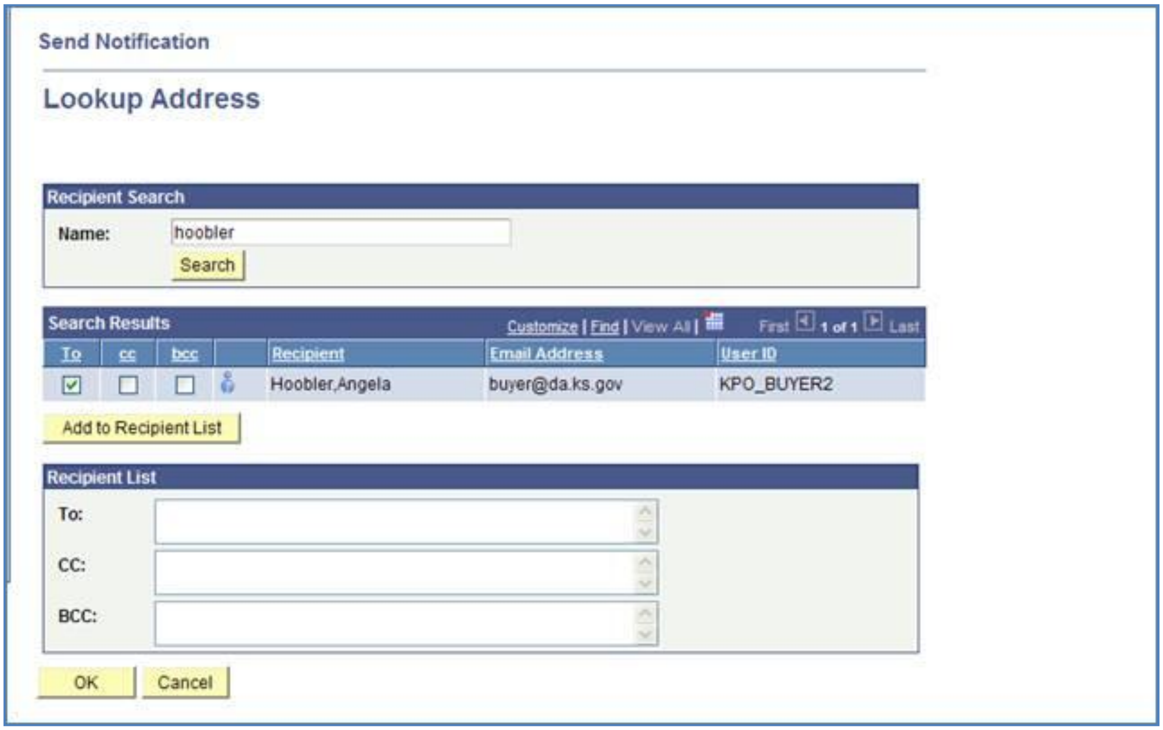


Figure 25. Send Notification - Lookup Address

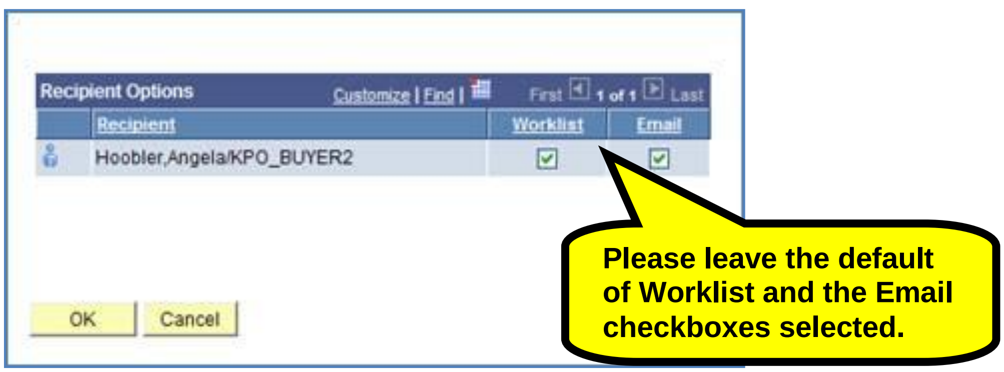


Figure 26. Send Notification – Recipient / Delivery Options

Participant Notes:

Walkthrough/Activity

We will now complete Activity 2 - Walkthrough: Enter Supplier Contract Transactional Data in your Activity Guide.

Walkthrough/Activity

You will now complete Activity 3 – Exercise: Enter Transactional Data for Supplier Contract in your Activity Guide.

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Participant Notes:

Topic 3: Copying an Existing Supplier Contract

Page Name	Navigation
Contract Entry – Copy Contract	Supplier Contracts → Create Contracts and Documents → Contract Entry → Copy From Contract link → Copy Contract page

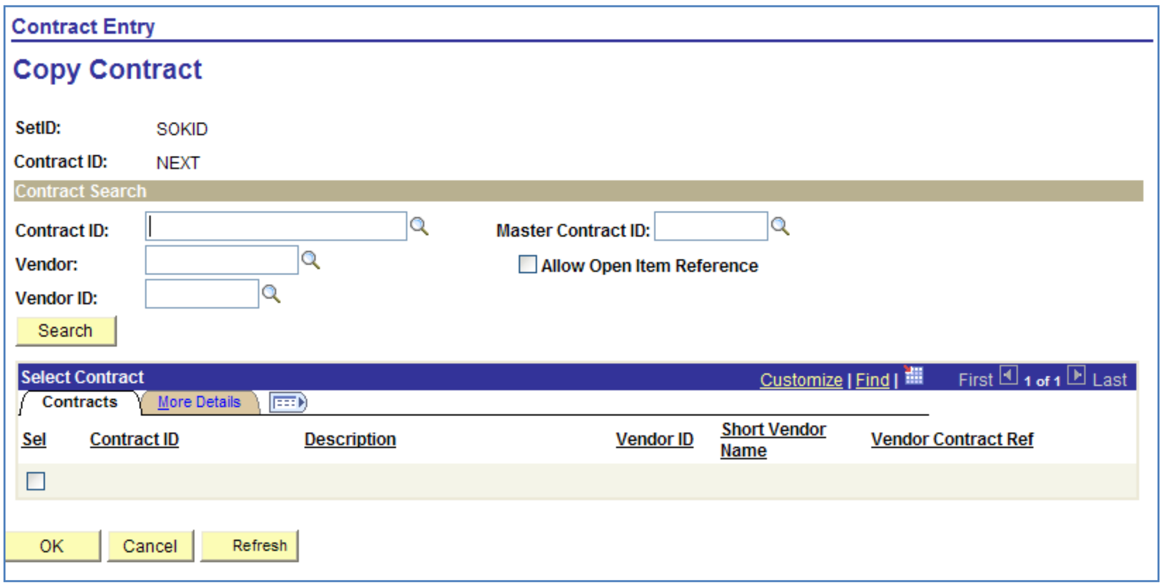

Figure 27. Copy Contract Page

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Participant Notes:

Contract Search

Use the Contract Search section to enter the search criteria for the existing transactional contract in SMART.

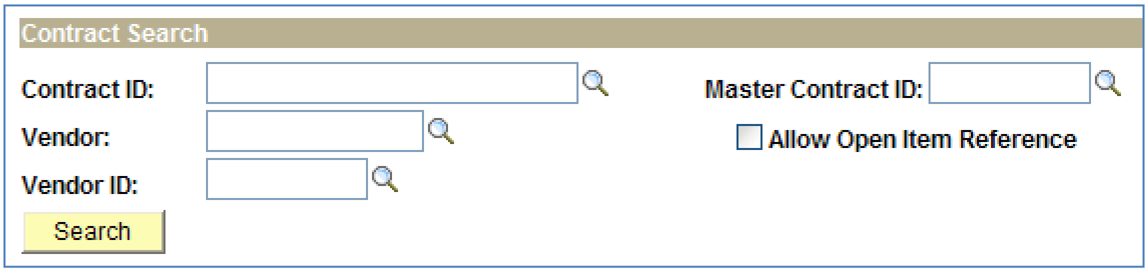

Figure 28. Contract Search Page

Fields	Description
Contract ID	Use the Contract ID field to enter the contract ID number
Vendor	Use the Vendor field to enter the vendor name
Vendor ID	Use the Vendor ID field to enter the vendor ID number
Allow Open Item Reference checkbox	Select the Allow Open Item Reference checkbox to indicate that the transactional contract you are searching for contains an open item reference

Table 18. Contract Search Page

Once you have entered your search criteria, click the Search button to locate the transactional contracts in SMART. The search results are displayed in the Select Contract section.

Participant Notes:

Select Contract – Contracts Page

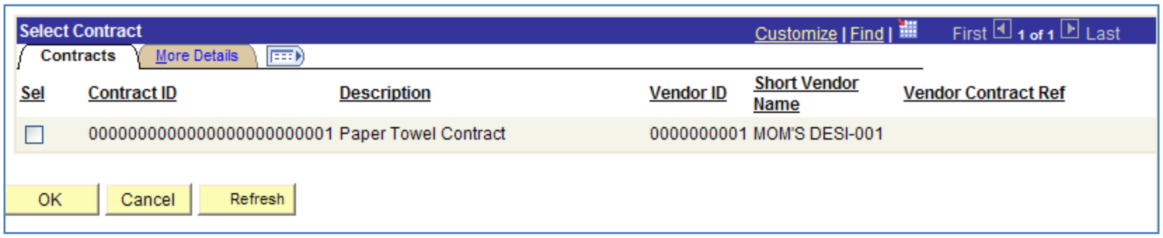

Figure 29. Select Contract – Contracts Page

Fields	Description
Sel checkbox	Use the Sel checkbox to select the existing transactional contract you wish to copy
Contract ID	Displays the existing transactional contract's ID number
Description	Displays the Description for the existing transactional contract (sourced from the Description field in the header section)
Vendor ID	Displays the vendor ID number for the existing transactional contract
Short Vendor Name	Displays the Short Vendor Name for the vendor on the existing transactional contract
Vendor Contract Ref	If a Vendor Contract Ref was entered on the existing transactional contract (in the Header section), it will be displayed here

Table 19. Select Contract – Contracts Page

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Participant Notes:

Select Contract – More Details page

Figure 30. Select Contract – More Details Page

Fields	Description
Sel checkbox	Use the Sel checkbox to select the existing transactional contract you wish to copy
Contract ID	Displays the existing transactional contract's ID number
Contract Status	Displays the existing transactional contract's status
Expire Date	Displays the Expire date (from the Header section) of the existing transactional contract
Open Item checkbox	• If the existing transactional contract is an 'Allow open item reference' contract, then this checkbox is displayed as selected. • If the existing transactional contract is not an open item contract, then this checkbox is displayed as empty (blank).

Table 20. Select Contract – More Details Page

Participant Notes:

Once you have selected the existing transactional contract you wish to copy (by selecting the Sel checkbox), click the OK button. Clicking the OK button, returns you to the Contract page. The details from the existing transactional contract are populated into the Contract page:

CAUTION!

It is important to know that only the transactional data entered in the existing transactional supplier contract will populate into the new transactional contract. For example: Attachments and comments will not be copied to the new transactional supplier contract.

It is imperative that you verify and modify ALL the new transactional contract information ***before*** saving the new transactional supplier contract.

Remember: You are unable to edit or modify a transactional contract once it is saved. Contact the Central Division of Purchases for assistance.

The Contract ID will be assigned to the new transactional contract when you save it.

Walkthrough/Activity

You will now complete Activity 4 - Walkthrough: Copy Existing Transactional Supplier Contract in your Activity Guide.

Participant Notes:

Lesson Review

In this lesson, you learned:

- How to use the transactional contract pages in SMART
- How to create a new transactional supplier contract in SMART
- How to copy an existing transactional supplier contract to create a new transactional contract in SMART
- The business processes associated with transactional contracts in SMART

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Participant Notes: