Contracts

State of Vermont

Department of Finance & Management

December - 2022

Revisions to Manual

December 2022

- Added a note to the Create Contract Change/Amendment section of the manual starting on page 41. If your agency/department uses a maximum line amount you must also update the maximum line amount(s) when you process a change order.

August 2019:

- Added a note to step 29 on page 31 that the amount must be set to at least .01

March 2019:

- Manual finalized

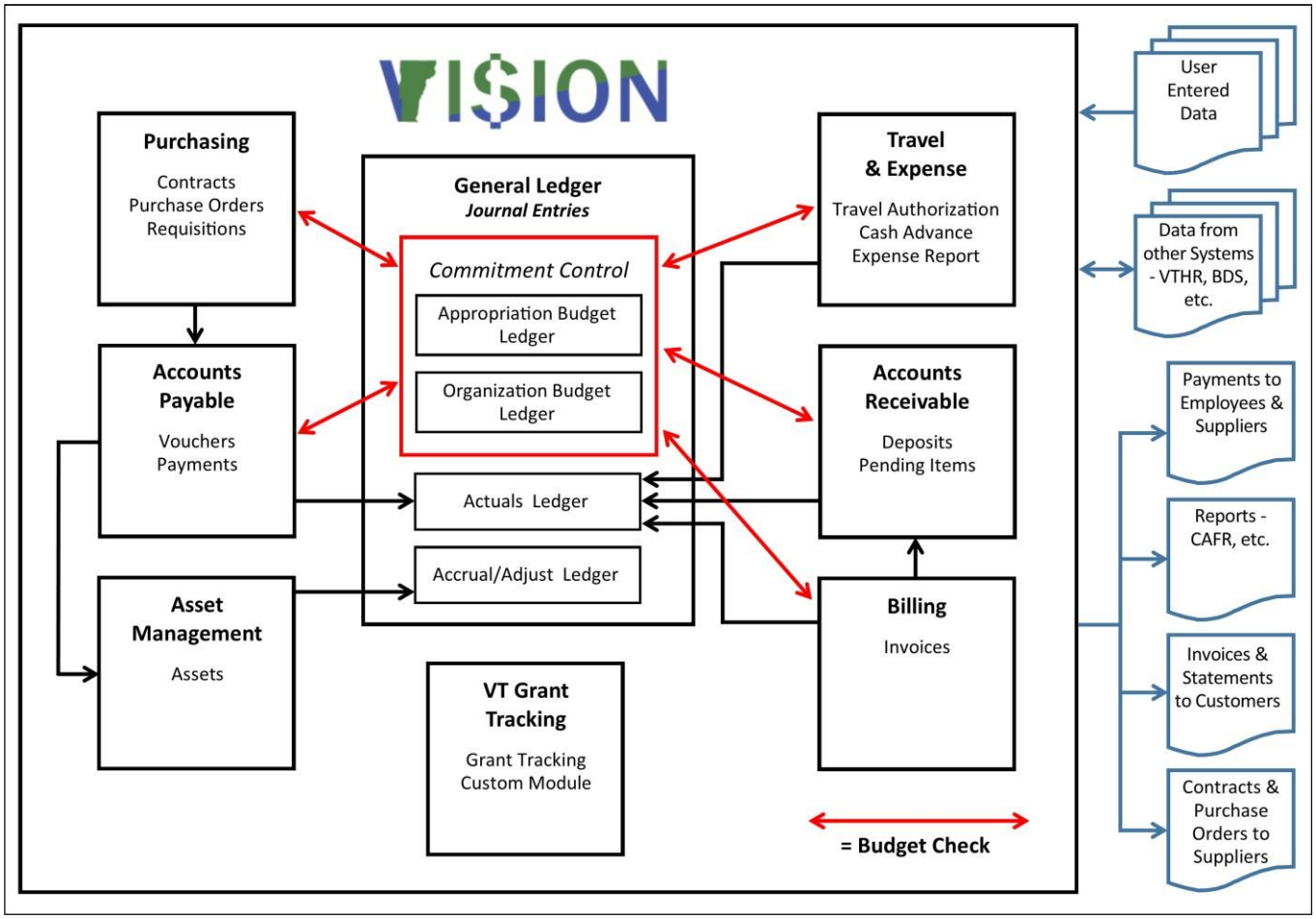
December 2018:

- Manual written

Table of Contents

Revisions to Manual 2
Introduction to Contracts 4
Frequently Asked Questions (FAQs) 7
Is there a State Contract for the item I need to purchase? 8
How to Find and Interpret a Contract 11
How to Determine if a Commodity is on Contract 20
Enter Services Contract 23
Define Contract Alert Notification Parameters for a Contract 35
Create Contract Change/Amendment 41
Print/Dispatch Contract 52
Close a Contract 55
Contract Document Status Inquiry 59
Inquire on Purchase Orders Against a Contract 60
Contracts by Origin Code Report 63
Contract Expiration Report 67
Review Contract Change History 70
Reports & Queries 73

Introduction to Contracts



Overview of VISION financial system:

There are several documents which should be reviewed to understand contracting requirements. All are accessible on the Finance & Management website.

VISION procedure #3 - http://finance.vermont.gov/policies-and-procedures/vision-procedures

Operational Guidance OG#2 - http://finance.vermont.gov/training-and-support/vision-job-aids-and-operational-guidance

Bulletin 3.5 - http://aoa.vermont.gov/bulletins

Bulletin #3.5 and VISION Procedure #3 require the use of purchase orders when making payment against all contracts if the payment is being made in VISION. Through VISION, a purchase order directly ties the expense to the available contract balance providing the greatest assurance that a contract will not be overspent, while also providing interested parties with real-time information regarding contract utilization. While a department may feel it's more efficient to track contract payments through a spreadsheet and not use purchase orders, there is no direct link or system control between a

department's spreadsheet and the processing of that payment in VISION…thus increasing the risk of overspending the contract.

A contract must be entered into the VISION system to comply with Bulletin 3.5 Standards. It is recommended that you visit the Agency of Administration's website and review Bulletin 3.5.

The Purpose and Policy from Bulletin 3.5 reads: "This Bulletin applies to the procurement of all goods and services and the required documentation of such procurements, regardless of dollar amount, for all agencies, as defined herein, of the State of Vermont government. This Bulletin provides guidelines for conducting procurements and contracting and establishes minimum benchmarks and protocols to ensure the solicitation and awarding of contracts for services are completed with sufficient competition. The State process is designed to: ensure fair and open competition; guard against favoritism, improvidence, extravagance, fraud and corruption; ensure the results meet Agency/department needs; provide for checks and balances and oversee Agency procurement activities; and protect the interest of the State and its taxpayers. Agencies and departments may develop individual processes and procedures applicable to their needs, in addition to the minimum stated requirements of this Bulletin."

****Agencies must enter the contract into the VISION financial system to obtain a contract number, regardless of the dollar amount.**

The only way to draw down on a contract is by entering a purchase order.

Tracking Performance Contracts:

Challenges for Change is a plan to make Vermont government and services more effective so that better results are delivered at lower cost to taxpayers. Challenges for Change was authorized by Act 68 (the Challenges Bill) of the 2009-2010 legislative session. See additional information in Bulletin 3.5, Performance Measures and Accountability. Bulletin 3.5 can be found at the following link: http://aoa.vermont.gov/bulletins.

As a result of the Challenges for Change initiative, a new page called "Performance Info" has been added to the contracts section of the Purchasing module. This page is a mandatory page that must be filled in and approved before new contracts added to the financial system can be approved. The performance info page provides a mechanism to track performance contracts and compliance with performance measures.

Contracts with a start date >= 7-1-10 are automatically designated as challenges for change contracts. The performance info page must be filled out and approved before the contract can be approved.

General Procurement Information:

In order to meet on-going reporting requirements pertaining to State contracting, additional contract data elements must be captured when entering contracts and contract amendments into VISION. These new elements include designating the "Process Used" to secure the agreement and the "Agreement Type". Although these elements are already required and captured when preparing Form AA- 14, additional "Agreement Types" have been added to reflect the changes with the reissue of Administrative Bulletin 3.5. Use of this General Procurement Information area begins July 1, 2016. The General Procurement Information Job Aid can be found on our Finance and Management website at http://finance.vermont.gov/training-and-support/vision-job-aids-and-operational-guidance.

The VISION Contract Amendment process is as follows:

- All Departments will create and maintain one contract without copying and creating new iterations.
- Contract Activities link – The comments fields behind the "Contract Activities" link **MUST** be used to identify all amendments. You **MUST** enter the contract amendment number from the AA-14 here. Entering information on this page will give you a quick view of all amendments.
- Add/Edit Comments link – Explanation for any amendments MUST also be entered on this page. This can be done easily with a cut and paste process. Entering information on this page allows all current and prior contract amendment information to be printed out and easily viewed (assuming "copy to supplier" is checked).

Departments are reminded that all documentation required by Bulletin 3.5 must be maintained off line and made available upon demand for audit purposes.

***** Finance is the only Department that processes contract adjustments. *****

Frequently Asked Questions (FAQs)

I added a contract that I no longer need or was entered with incorrect information (i.e., wrong supplier). What do I do with it?

You cannot delete the contract, instead you can close the contract and create a new one if necessary. If you no longer need to use the contract, navigate to Purchasing > Procurement Contracts, change the status to Closed, and save. We do not use the Cancel function in VISION.

Why am I receiving an "Invalid Value" error message when I try to enter a PO against a valid contract?

Typically, this happens because of a couple of different reasons. On the Contract Header page, check the begin and expire dates to confirm the contract is available for use. If the dates are valid, verify the contract is in Approved status. If the dates are fine and the contract is approved, contact VISION Support at VISION.FinHelpdesk@vermont.gov for assistance.

Why aren't the PO Defaults I put in my Contract coming into my Purchase Order?

PO Defaults set up on a Contract will only come into the Purchase Order if the PO is copied from the Contract. If you enter the Contract number on the Contract tab of your PO, the default information will not come forward.

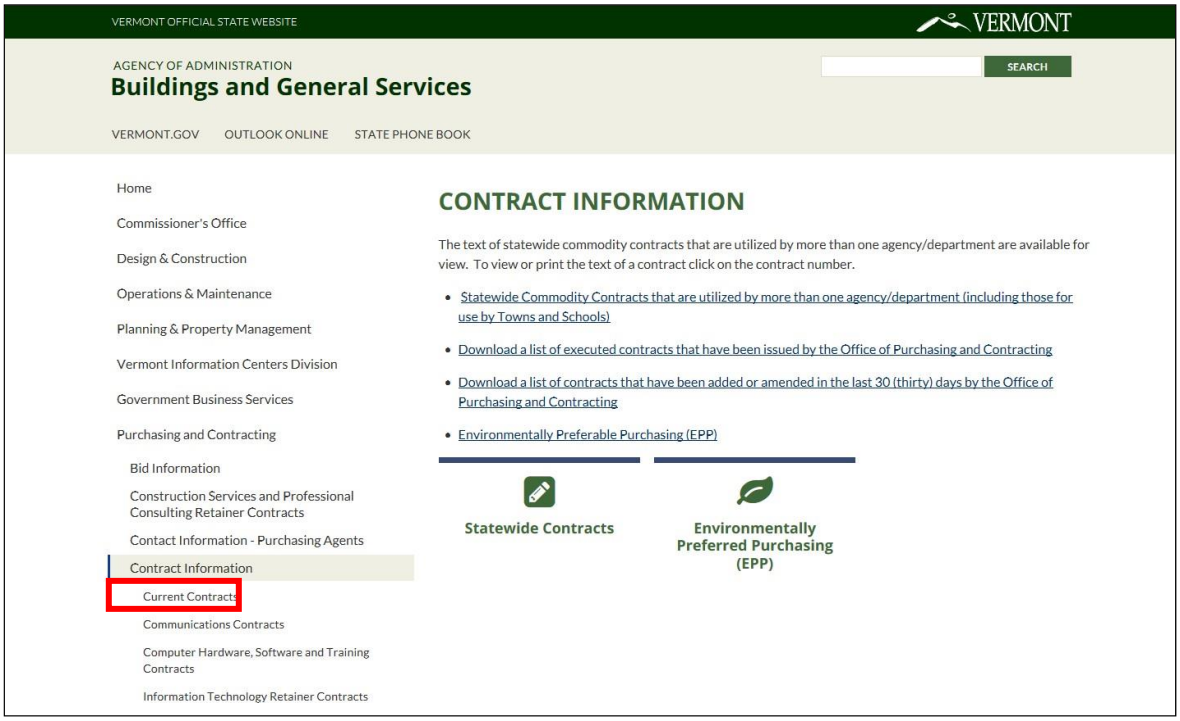
What do I do if the remaining amount of my contract is incorrect due to the PO that I entered incorrectly?

- If the PO has not been completed, then you will need to process a change order to the PO to properly update the remaining amount of the contract. For information on processing change orders, please refer to the Purchasing 102 manual located on the Finance and Management website at http://finance.vermont.gov/training-and-support/vision-manuals
- If the PO had been completed, then you will need to contact a member of Financial Operations to have a manual contract adjustment processed.

Is there a State Contract for the item I need to purchase?

To determine if there is a State contract for a specific item you need to purchase, go to the Office of Purchasing and Contracting website located on the State of Vermont website under Dept. of Buildings and General Services.

Navigation: Go to the Purchasing and Contract website at http://bgs.vermont.gov/purchasing-contracting/contract-info



Click on **Current Contracts**

NOTE: Please note that when accessing Current Contracts from the Office of Purchasing & Contracting website at http://www.bgs.vermont.gov/purchasing-contracting/contract-info/current (including those for use by Town and Schools), these contracts are statewide use contracts and do not include individual agency-specific contracts issued by the Office of Purchasing & Contracting.

CURRENT CONTRACTS

To see the text of a contract click on the contract number. If you need further information, send the purchasing agent an e-mail by clicking on their name. In order to view, navigate, download or print the contracts you will need the free.

See the complete list of contracts where the purchasing card may be used as a method of payment

To Search This Page Press "Control F"

Audio Visual
Automotive
Beds and Bedding
Building Supplies
Clothing and Footwear
Communications
Computer Hardware, Software and Training
Custodial Supplies
Document Destruction Services
Electrical Equipment, Supplies and Service
Fasteners
Filters
Fire Protection Equipment and Supplies
Flags
Food
Fuel
Highway Materials and Equipment
Hospital and Surgical Equipment
Industrial Supplies
Interior Coverings
Laboratory and Field Equipment
Lawn and Grounds Equipment
Markers and Signs
Mail and Express Services
Medical
Newspaper Advertising
Office Furniture
Office Machines
Office Supplies
Paper and Plastic Products, Disposable
Paper, Envelopes and Forms
Police Equipment and Supplies
Printing
Safety Equipment and Services
Scrap Metal Removal
Translation Service
Training
Visual and Auditory Aids
Waste Hauling and Recycling
Welding Supplies

To search the page press "Control + F" or select a category

Clothing and Footwear

- Safety Shoes and Boots : Industrial Protection Product, Contract 33797
- FPR Resale Shirts: Express Press, Contract 36507
- Inmate Uniforms : Acme Supply Co Ltd, Contract 34128
- Inmate Clothing : Bob Barker Company Inc., Contract 36206
- Corrections Officer's Uniform : Ben's Uniforms, Inc., Contract 37190
- Forestry Clothing: Initial Ideas, Contract 35154
- Security Uniforms : Ben's Uniforms, Inc., Contract 29501
- Shirts and Caps : Express Press, Contract 36747
- Rough Duty Uniforms : Ben's Uniforms, Inc, Contract 36054
- State Police Uniforms : Ben's Uniforms, Inc, Contract 34114
- Uniform Rental & Cleaning: Unifirst, Contract 35508
- Vermont Information Center Uniforms: Express Press, Contract 36760
- High Visibility Safety Clothing: Applied Industrial Technologies Inc, Contract 35356
- High Visibility Safety Clothing: Reflective Apparel Factory Inc., Contract 35354
- Police Supplies : Galls LLC, Contract 36764

Click on the **contract number** to view a particular contract:

State of Vermont
Buildings and General Services
Office of Purchasing & Contracting
109 State St
Montpelier VT 05609-3001
USA

CONTRACT

Vendor ID 0000009824
Ben's Uniforms Inc
20 Main Street
Amesbury MA 01913
USA

Phone #: 978-388-0471

Contract ID		Page
00000000000000000000034114		1 of 3
Contract Dates	**Origin**	
06/15/2017 to 06/14/2019	CPS	
Description:	**Contract Maximum**	
CPS - STATE POLICE UNIFORMS	$999,999.99	
Buyer Name / **Buyer Phone**	**Contract Status**	
LaRose,Deborah L 828-4635	Approved	

Line #	Item ID	Item Desc	UOM	Unit Price	Max Qty	Max Amt
1		VERMONT STATE POLICE DRESS BLOUSE PER ATTACHED SPECIFICATIONS.	EA	495.00000	0.00	0.00
	FECHHEIMER #VTSP - BLOUSE COAT					
2		VERMONT STATE POLICE HONOR GUARD BLOUSE PER ATTACHED SPECIFICATIONs.	EA	595.00000	0.00	0.00
	FECHHEIMER #VTSP-HONOR GUARD BLOUSE					
3		VERMONT STATE POLICE LONG SLEEVE MEN'S SHIRTS PER ATTACHED SPECIFICATIONS.	EA	114.00000	0.00	0.00
	FECHHEIMER #VTSP-LS					
4		VERMONT STATE POLICE SHORT SLEEVE MEN'S SHIRTS PER ATTACHED SPECIFICATIONS.	EA	90.00000	0.00	0.00
	FECHHEIMER #VTSP-SS					
5		VERMONT STATE POLICE SUMMER TROUSERS PER ATTACHED SPECIFICATIONS.	EA	100.00000	0.00	0.00
	FECHHEIMER #VTSP-ST					
6		VERMONT STATE POLICE WINTER TROUSERS PER ATTACHED SPECIFICATIONS.	EA	115.00000	0.00	0.00
	FECHHEIMER #VTSP-WT					
7		VERMONT STATE POLICE NECKTIE PER ATTACHED SPECIFICATIONS.	EA	8.00000	0.00	0.00
	S. BROOME #45015/45035/45065					

Contract page opens displaying information regarding what items are on this contract.

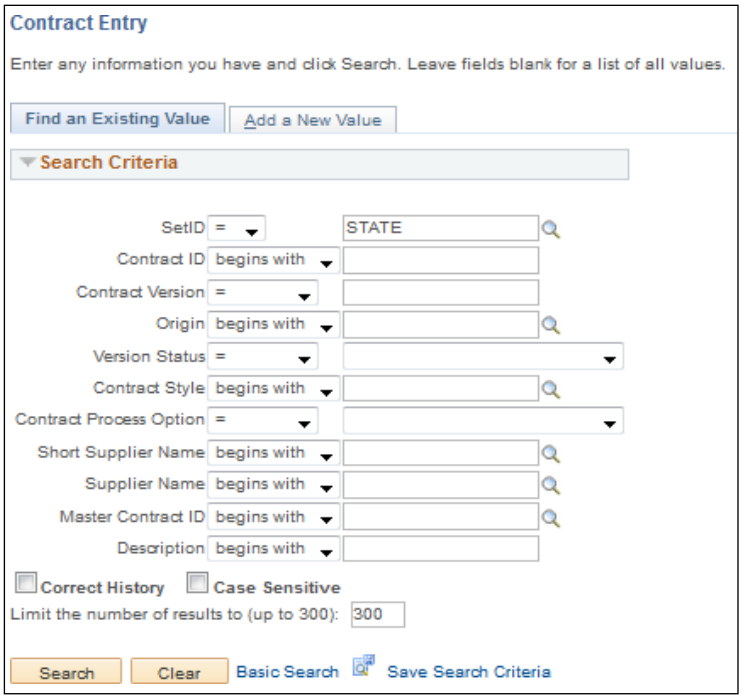
Is there a State Contract for the item I need to purchase? Is Complete

How to Find and Interpret a Contract

WorkCenter navigation: Purchasing WorkCenter > Links Pagelet > Contracts > Add/Update Contracts

Navigator Menu navigation: Procurement Contracts > Add/Update Contracts

The **Contract Entry** page displays, click on the **Find an Existing Value** tab:

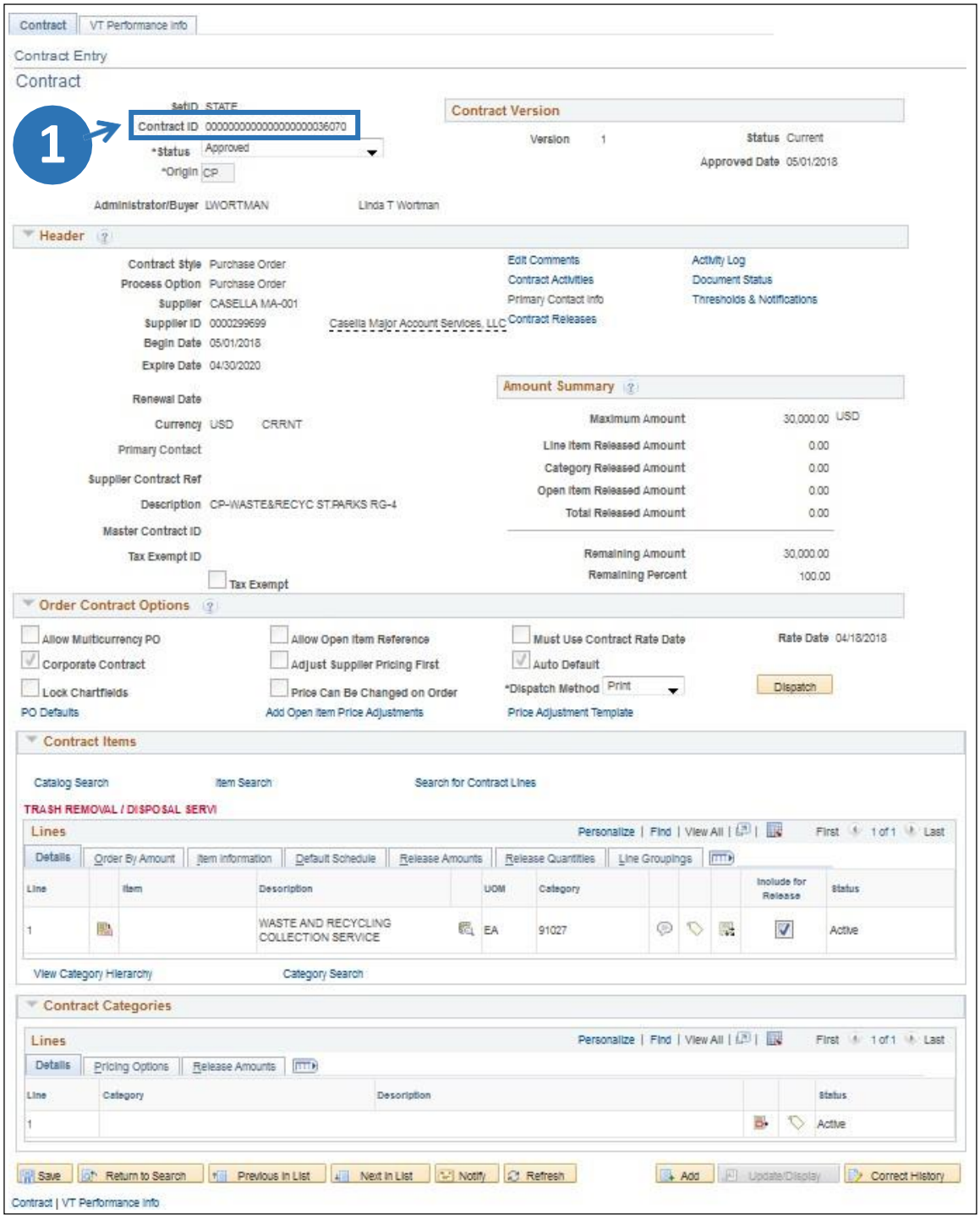


SetID = **STATE** defaults in.

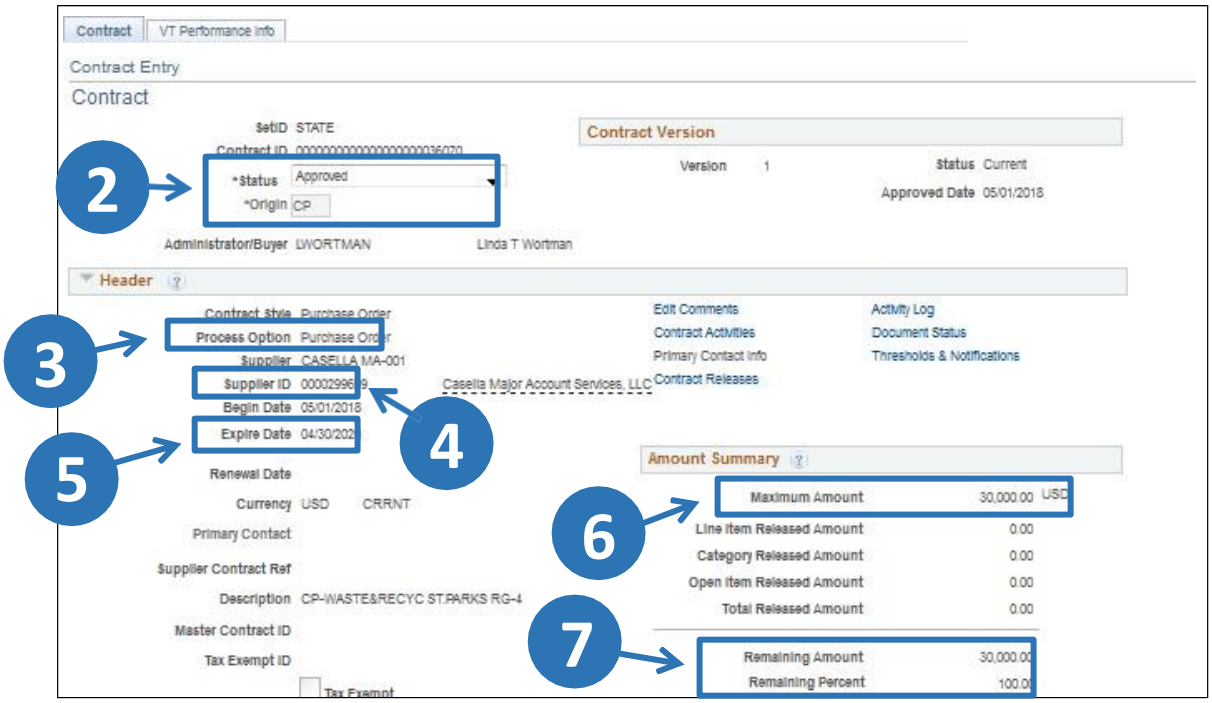
There are three ways to search for a contract:

1. **Contract ID** - If you know the contract number, enter the number in the Contract ID field and be sure to include the leading zeros. You can also click on the drop-down arrow, change "begins with" to "contains" and search by part of the number.
2. **Origin Code** - This is a good way to search for contracts belonging to your department. You can also search for Central Purchasing contracts by using their origin codes of CP and CPS however this may be a long list.
3. **Short Supplier Name** - Enter part or as much of the Supplier Name as you wish, click the magnifying glass to return a list of suppliers with a similar short name to select from, then click the **Search** button. Remember, sometimes putting in too many letters reduces your chance of success.

Once you have selected the contract and clicked **Search** the following page will display:



1. The **Contract ID number** displays on the top of the contract



2. **The Contract must be in "approved" status in order to use the contract in a purchase order.** If the contract status is something other than approved and: **Origin code = CP or CPS** – contact the Purchasing Agent (828-2211) - to find the agent click on the Contract Thresholds link or look in the Current Contracts list, **Origin code = Your Dept** – contact the appropriate person in your department

3. **Contract Process Option -** The process option should be **Purchase Order** for the contract to be used in a purchase order and to be able to print the contract

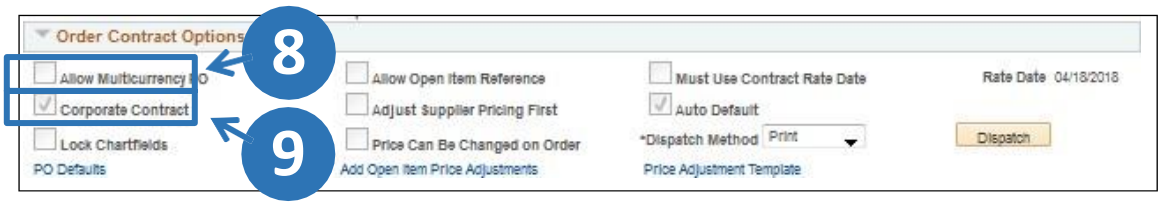
4. **Supplier ID Number** - The Contract number and the Supplier ID number form a partnership. If you are creating a Purchase Order and do not have the correct Supplier ID number, you will not be able to bring in a line from that contract. The Supplier Address for the Contract will default from the Supplier record. There will be no ability in VISION to change the Supplier Address directly on a Contract

5. **Expiration Date** - The last date the contract is available to use. If the expiration date of the contract has already gone by, in order to use the contract, you will need to make the PO date prior to the expiration date of the contract. (This should only be done if the services were for the time period the contract was valid)

6. **Maximum Amount** - The maximum dollar amount of the contract

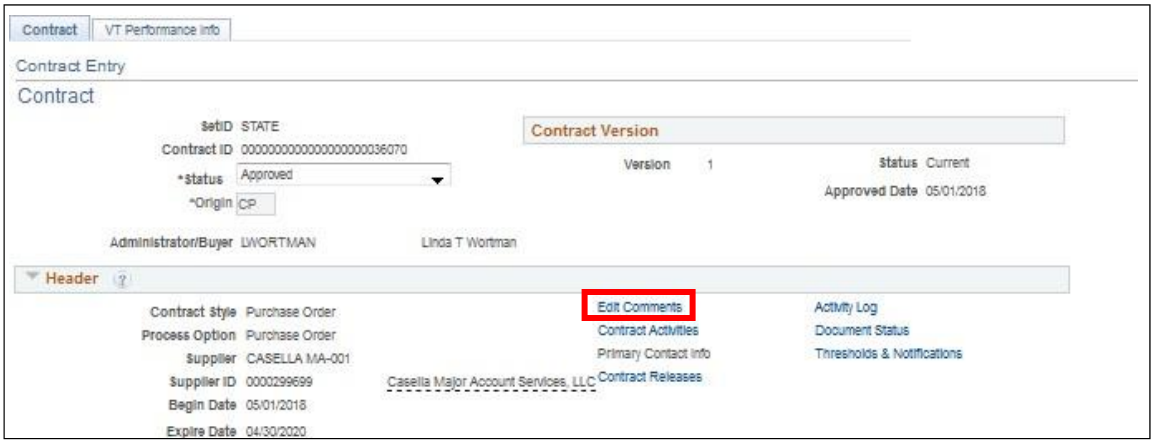
7. **Remaining Amount** - The maximum amount of the contract minus the total released amount. This tells you how much is left on the contract to spend

Under Order Contract Options

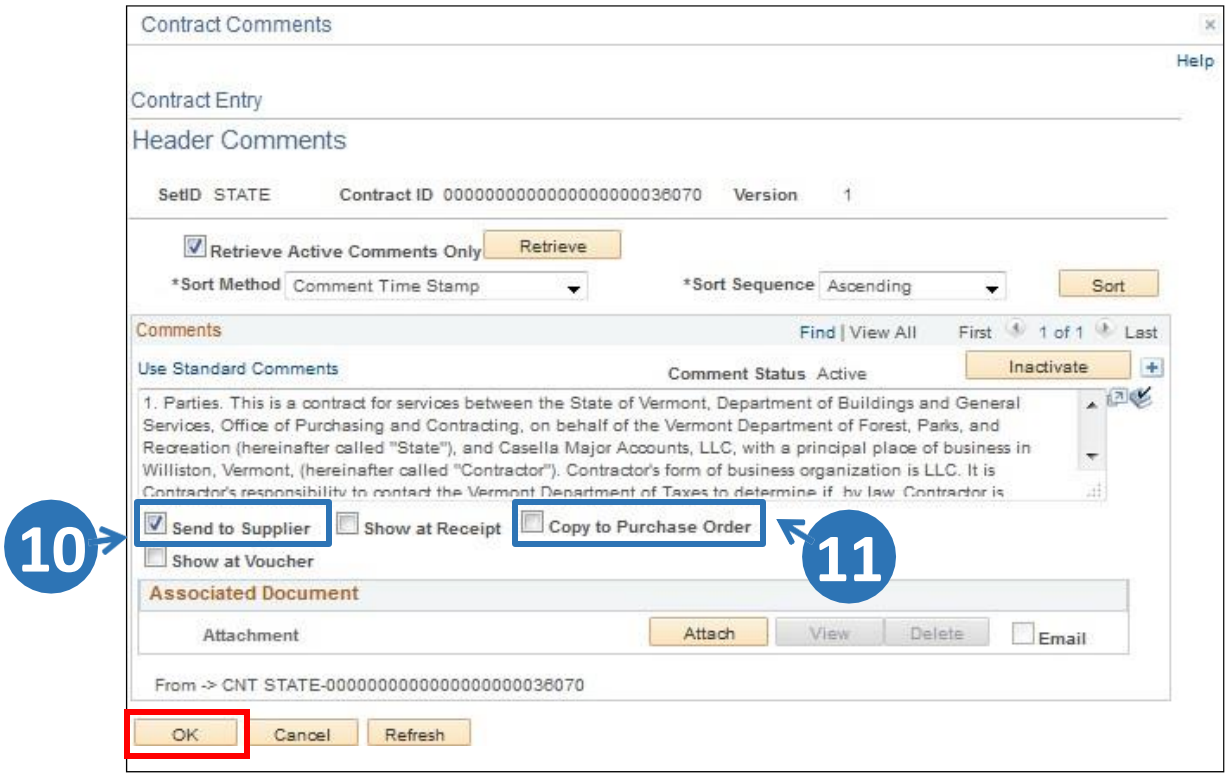


8. **Allow Multicurrency PO** - This box defaults in as unchecked and cannot be changed. Currently the State of Vermont only processes transactions in US Dollars
9. **Corporate Contract** - This box defaults in as checked. This allows all business units to potentially use this contract. All CP or CPS contracts should have this box selected. In addition, if your department has multiple PO Business units, you must leave this box selected. **To restrict use of the contract to your BU only, uncheck the Corporate Contract checkbox and click on PO Defaults to enter department-specific information**

Click the **Edit Comments** link (or **Add Comments** link, if there aren't any comments yet) to view comments about the contract:

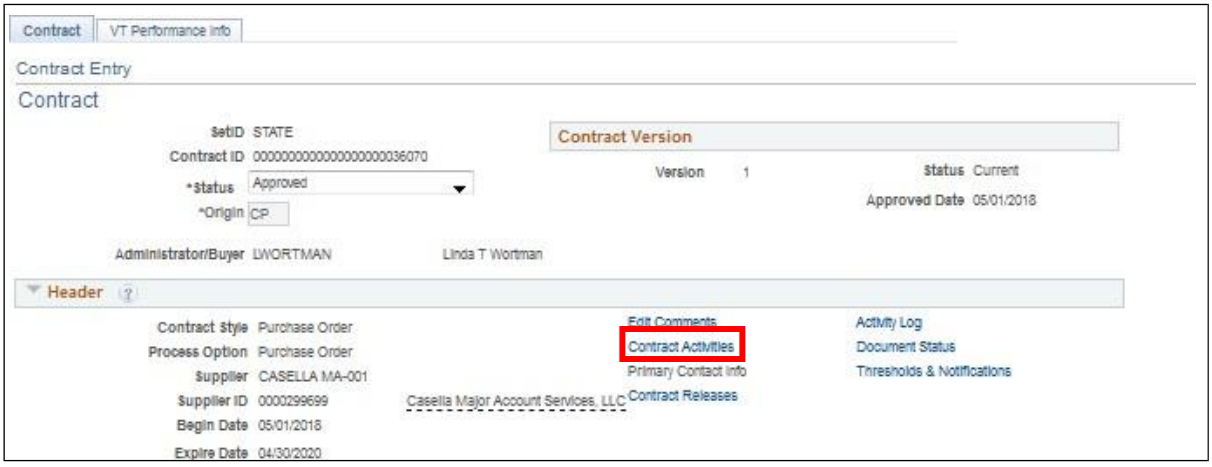


The **Header Comments** page displays and is available to enter additional information about the contract:

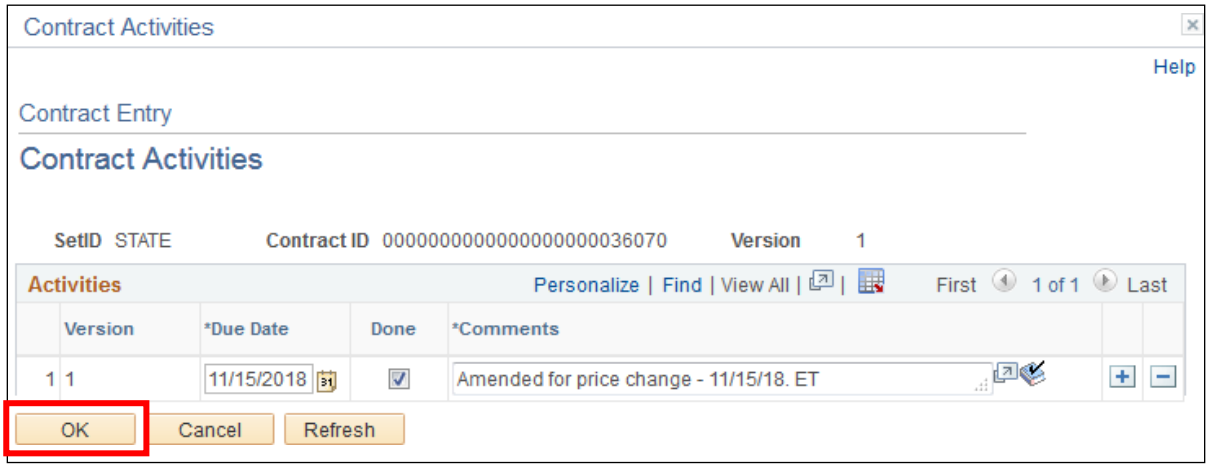


Any Contract Amendments **MUST** be entered here as well as on the Contract Activities page.

10. **Send to Supplier -** Click on this box if you want comments to be seen on the printed version of the contract. If the comments are for internal use only, leave the check box unchecked
11. **Copy to Purchase Order -** Select this box if you want comments to copy over to the PO
12. Click **OK**
13. Click the **Contract Activities** link to view additional information



The **Contract Activities** page displays:



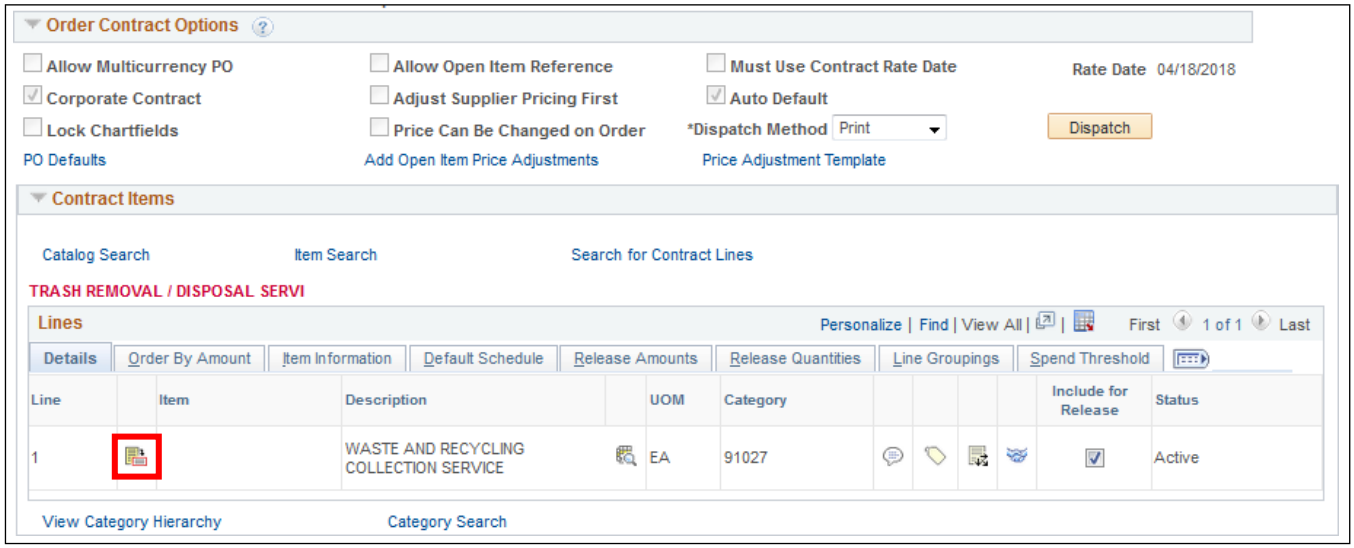
This is the page where **all contract activity**, such as approvals and amendments, **MUST** be recorded. This information is required. You should also include initials of the person who updated this information. For example:

"Approved on 3/31/12 with signatures. TJ"

"Amended 4/15/12 to add Section 3. TJ"

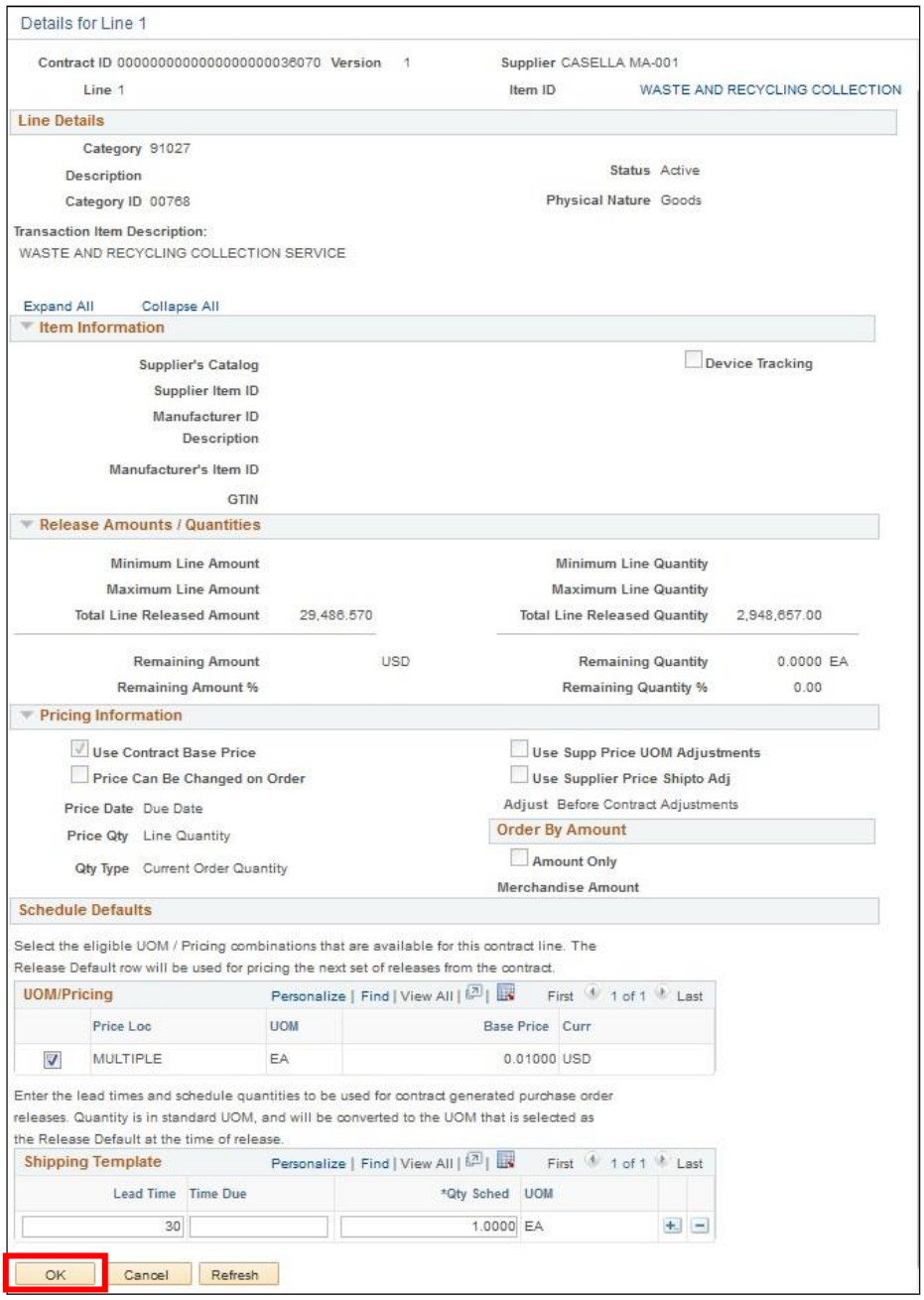
In the case of an amendment, provide a description of what was updated, and you **MUST** include the contract amendment number from the AA-14.

14. Click **OK**



15. Click the **Line Details** icon to see additional contract information

The **Details for Line 1** page displays:

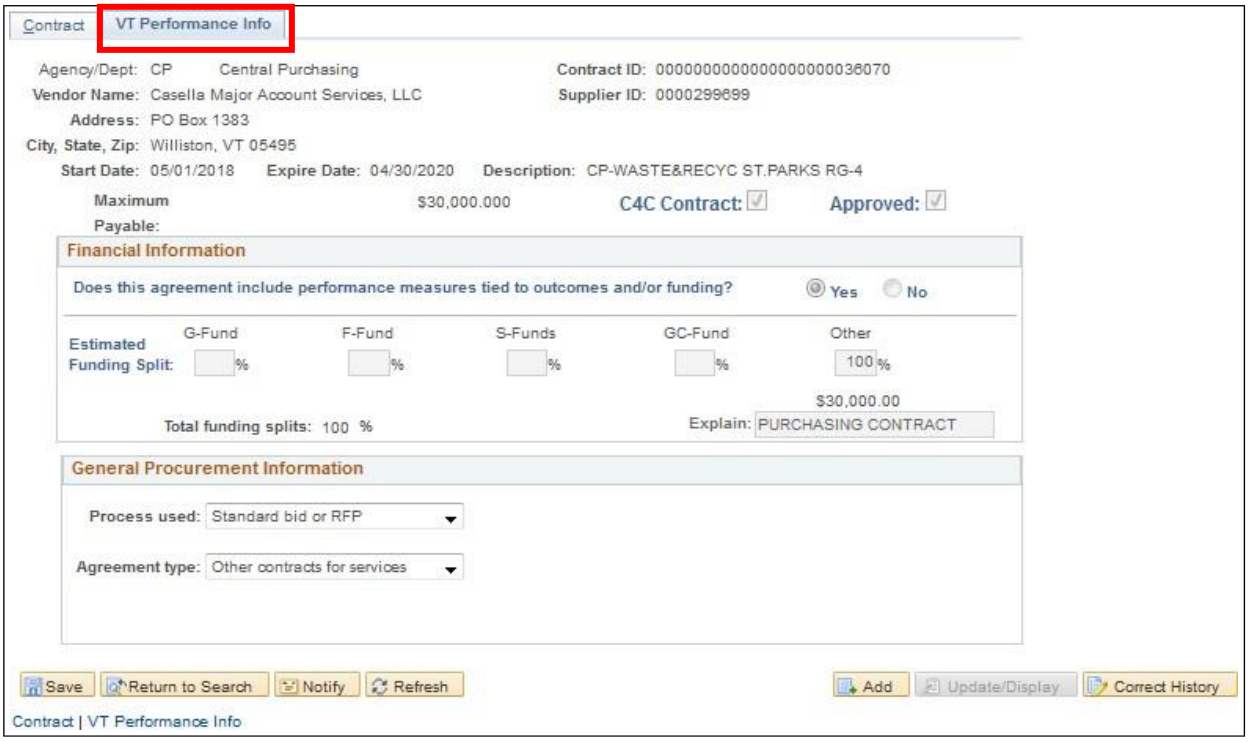


This is the page that determines whether the “Price Can Be Changed on Order”. If this option is checked, you can change purchase order prices that default in from the contract.

This is also where the base price is entered. Any maximum or minimum line quantities are entered here. For example, if when the contract was negotiated it was determined that line 6 of the contract should only have $60,000 spent against it, a maximum line amount of $60,000 could be entered for the maximum line amount. This would only allow up to $60,000 in purchase orders to go against line 6.

16. Click **OK**

You are returned to the **Contract** page:



17. Click the **VT Performance Info** tab

All the information filled in above comes directly from the Contract page.

C4C Contract box:

- This box will be checked and grayed out for **all** contracts entered with a start date >= 7-1-10. This indicates that the contract is a challenges for change contract and will require the Financial Information section to be filled in
- If the contract has a start date <= 6-30-10 the box will not be checked and the Financial Information section will not need to be filled in
- If the contract has a start date <= 6-30-10 and it is determined that the contract is a challenges for change contract, the box can be checked and the Financial Information area would need to be filled in

If the contract is a C4C contract; then the Financial Information area must be filled in:

- The question "Does this agreement include performance measures tied to outcomes and/or funding" must be answered by choosing "Yes" or "No".
- Estimated Funding Split: A percentage must be entered for how the contract money will be spent. The total funding splits must equal 100%. These splits will automatically calculate the dollar amount based on the percentages entered per each fund.
- G-Fund = general fund
- F-Fund = federal fund
- S-Fund = special fund

- GC-Fund = global commitment fund
- Other (If "Other" is chosen, a text box will open, and a description of the funding source must be entered)

Note: For contracts that can be used throughout the state, such as Purchasing and Contract Administration contracts with an origin code of CP or CPS or master contracts such as those for Marketing and DII, if the funding source cannot be determined then use 100% "Other". A suggested description of the funding source would be "Central Purchasing" or "Master".

Approval box: This box must be checked if the C4C box is checked. Only users with security to approve a contract will be able to approve the Performance Info page. A contract that is a C4C contract must have the Performance Info page approved before the contract can be approved.

General Procurement Information:

Based on information captured when preparing Form AA-14.

Drop Down Values

Process Used:

- Qualifications based selection
- Simplified bid
- Sole sourced
- Standard bid or RFP
- Statutory

Agreement Type:

- Architectural/Engineering
- Commodity
- Construction
- Data Usage and/or Data Sharing
- Financial Transaction
- Grant
- Information Technology
- Marketing
- Other Contracts for Services
- Privatization
- Professional Services
- Retired or Former Employee
- Zero Dollar (or No-Cost)

The General Procurement Information area is designed so that selecting values in the drop-down fields are required fields.

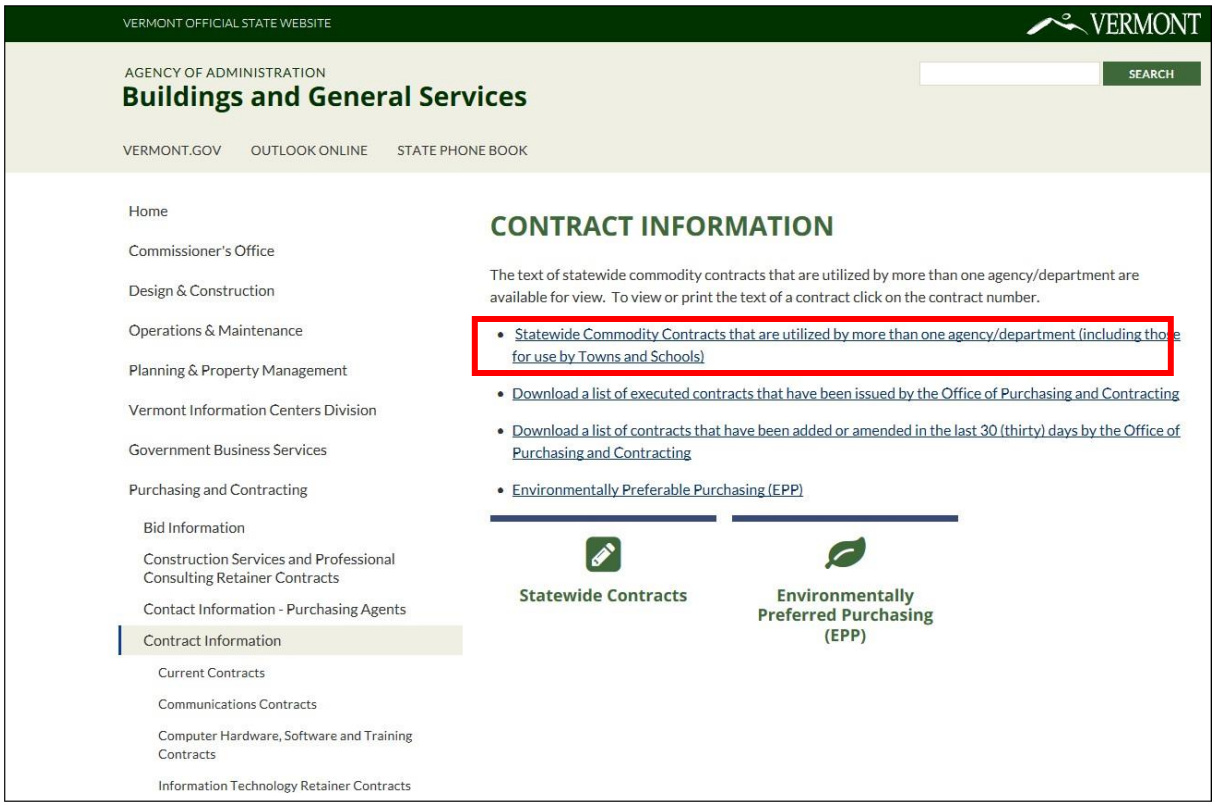
<u>New contracts:</u> If a new contract is entered into VISION, the drop-down values must be selected before the contract can be moved to "approved" status.

<u>Existing contracts:</u> If an existing contract, in an "approved" or "closed" status, is moved to "open" and then to "approved" status, the General Procurement information area needs to be complete. (I.e., if values do not exist, they need to be selected.) If an existing contract, whether "approved" or "open", is moved to "closed" status the General Procurement information area will not need to be filled in.

Finding and Interpreting a Contract is Complete

How to Determine if a Commodity is on Contract

Navigation: Go to the Purchasing and Contract Administration website at http://www.bgs.vermont.gov/purchasing-contracting/contract-info .



1. Click on Statewide Commodity Contracts that are utilized by more than one agency/department (including those for use by Towns and Schools)

   NOTE: Please note that when accessing Current Contracts from the Office of Purchasing & Contracting website at http://www.bgs.vermont.gov/purchasing-contracting/contract-info/current (including those for use by Town and Schools), these contracts are statewide use contracts and do not include individual agency-specific contracts issued by the Office of Purchasing & Contracting.

CURRENT CONTRACTS

To see the text of a contract click on the contract number. If you need further information, send the purchasing agent an e-mail by clicking on their name. In order to view, navigate, download or print the contracts you will need the free.

See the complete list of contracts where the purchasing card may be used as a method of payment

To Search This Page Press "Control F"

Audio Visual
Automotive
Beds and Bedding
Building Supplies
Clothing and Footwear
Communications
Computer Hardware, Software and Training
Custodial Supplies
Document Destruction Services
Electrical Equipment, Supplies and Service
Fasteners
Filters
Fire Protection Equipment and Supplies
Flags
Food
Fuel
Highway Materials and Equipment
Hospital and Surgical Equipment
Industrial Supplies
Interior Coverings
Laboratory and Field Equipment
Lawn and Grounds Equipment
Markers and Signs
Mail and Express Services
Medical
Newspaper Advertising
Office Furniture
Office Machines
Office Supplies
Paper and Plastic Products, Disposable
Paper, Envelopes and Forms
Police Equipment and Supplies
Printing
Safety Equipment and Services
Scrap Metal Removal
Translation Service
Training
Visual and Auditory Aids
Waste Hauling and Recycling
Welding Supplies

2. To search the page press "**Control + F**" or select a category

Building Supplies

- Lumber and Building Supplies
  - LaValley Building Supply Inc, Contract 34436
  - Poulin Lumber, Contract 34441
- Hardwood Plywood
  - Atlantic Plywood Corporation, Contract 36064
- Plumbing and HVAC Supplies
  - Granite Group, Contract 30953
  - F. W. Webb, Contract 31324

3. Click on the contract number to view a particular contract

CONTRACT

State of Vermont
Buildings and General Services
Office of Purchasing & Contracting
109 State St
Montpelier VT 05609-3001
USA

Vendor ID 0000010786
Webb F W Co
10 Clark Rd
Barre VT 05641
USA

Phone #:

Contract ID 00000000000000000000031324		Page 1 of 4
Contract Dates 04/01/2016 to 03/31/2019	**Origin** CPS	
Description CPS-PLUMBING & HVAC SUPPLIES	**Contract Maximum** $9,999,999.00	
Buyer Name Berini,Brian Jon	**Buyer Phone** 802/828-2217	**Contract Status** Approved

Line #	ItemID	ItemDesc	UOM	Unit Price	Max Qty	Max Amt
1		PIPE AND FITTINGS (VALVES, ELBOWS, COUPLINGS, etc.) OF VARIOUS SIZES (APPROX. 1/4" TO 4") AND MATERIALS (COPPER, IRON, PLASTIC, etc.).	EA	0.01000	0.00	0.00
	30% OFF RETAIL					
2		WATER HANDLING PUMPS (CIRCULATOR, SUMP, etc.) INCLUDING MOTORS AND THEIR ASSOCIATED MAINTENANCE AND ACCESSORY PARTS (TEMP AND PRESSURE CONTROLS, GASKETS, COUPLINGS, etc.).	EA	0.01000	0.00	0.00
	35% OFF RETAIL					
3		BOILER AND FURNACE BURNERS FOR MULTIPLE FUELS AND THEIR ASSOCIATED MAINTENANCE AND ACCESSORY PARTS (FUEL PUMPS, FUEL VALVES, NOZZLES, IGNITER POINTS, etc.).	EA	0.01000	0.00	0.00
	20% OFF RETAIL					
4		AIR HANDLING FANS AND DAMPERS INCLUDING THEIR MOTORS AND ASSOCIATED MAINTENANCE AND ACCESSORY PARTS (TEMP AND PRESSURE CONTROLS, FILTERS, GASKETS, COUPLINGS, ACTUATORS, etc.).	EA	0.01000	0.00	0.00
	30% OFF RETAIL					
5		SYSTEM CONTROL DEVICES AND CONTROLLERS (SOLENOIDS, ZONE CONTROLS, THERMOSTATS, DIGITAL INTERFACES, etc).	EA	0.01000	0.00	0.00

Contract page opens displaying information regarding what is under contract for building supplies with this supplier.

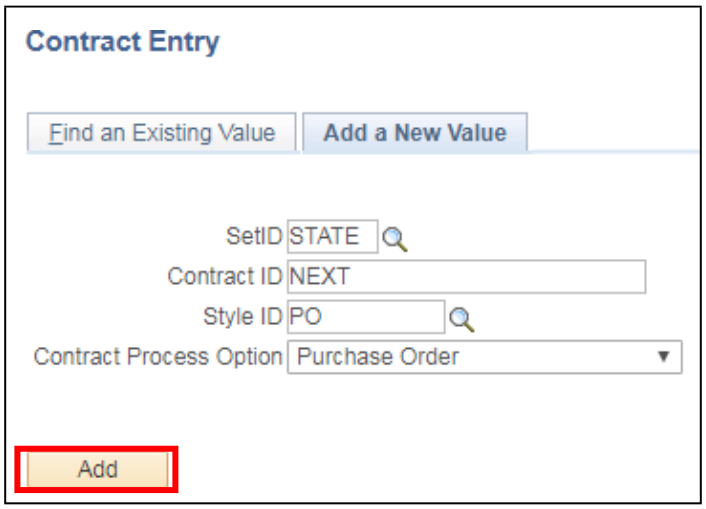
How to Determine if a Commodity is on Contract is Complete

Enter Services Contract

WorkCenter navigation: Purchasing WorkCenter > Links Pagelet > Contracts > Add/Update Contracts

Navigator Menu navigation: Procurement Contracts > Add/Update Contracts

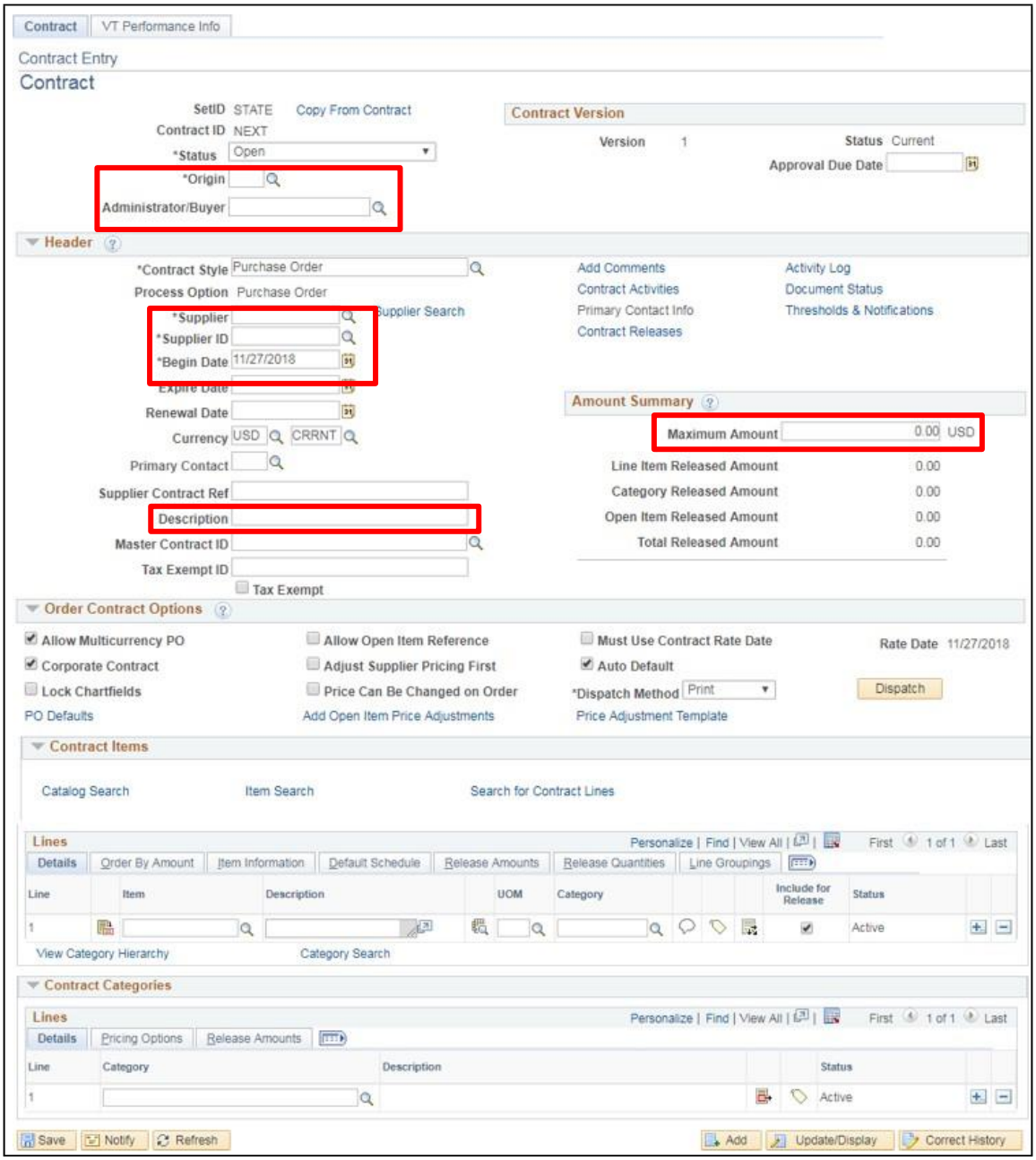
The **Contract Entry** page displays:



Note: In the Contract Process Option field, the value defaults as Purchase Order. Accept the default so that you can dispatch and print the contract. If you enter a contract and you selected an option other than "purchase order", you will need to close the contract and create a new one to be able to dispatch/print.

1. Click **Add**

The **Contract** page displays:



2. **Origin Code -** Enter an Origin Code
3. **Administrator/Buyer -** Enter the Administrator/Buyer
4. **Supplier ID -** *Do not utilize the Supplier search link on this page, searching for the supplier number should be done using the following* ***Navigation:*** *Suppliers > Supplier Information> Add/Update > Supplier*
5. **Begin Date** & **Expire Date -** Select the Begin and Expire dates for the contract

6. **Description -** If you want to see a description on reports that you run, you should enter a meaningful description here

7. **Maximum Amount -** You can select a maximum amount if desired

Contract | VT Performance Info

Contract Entry

Contract

SetID STATE Copy From Contract
Contract ID NEXT
*Status Open
*Origin FM
Administrator/Buyer

Contract Version
Version 1 Status Current
Approval Due Date

Header

*Contract Style Purchase Order
Process Option Purchase Order
*Supplier Supplier Search
*Supplier ID 0000084643
*Begin Date 11/27/2018
Expire Date 12/31/2018
Renewal Date
Currency USD CRRNT
Primary Contact
Supplier Contract Ref
Description Oracle Tech Services
Master Contract ID
Tax Exempt ID
Tax Exempt

Add Comments
Contract Activities
Primary Contact Info
Contract Releases
Activity Log
Document Status
Thresholds & Notifications

Amount Summary

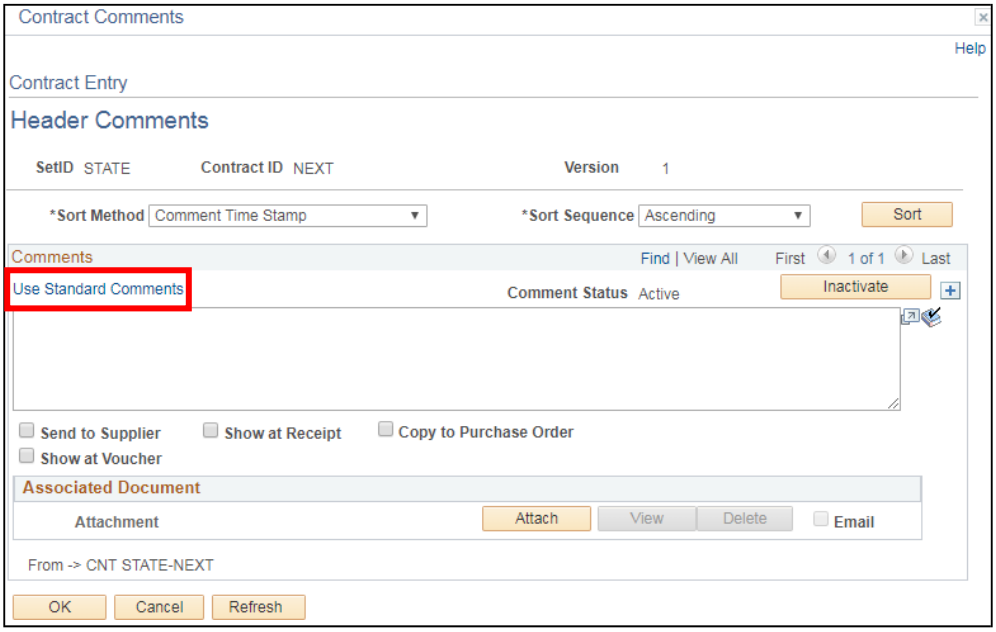
Maximum Amount 100000.00 USD
Line Item Released Amount 0.00
Category Released Amount 0.00
Open Item Released Amount 0.00
Total Released Amount 0.00

Order Contract Options

Allow Multicurrency PO
Corporate Contract
Lock Chartfields
PO Defaults
Allow Open Item Reference
Adjust Supplier Pricing First
Price Can Be Changed on Order
Add Open Item Price Adjustments
Must Use Contract Rate Date
Auto Default
*Dispatch Method Print
Price Adjustment Template
Rate Date 11/27/2018
Dispatch

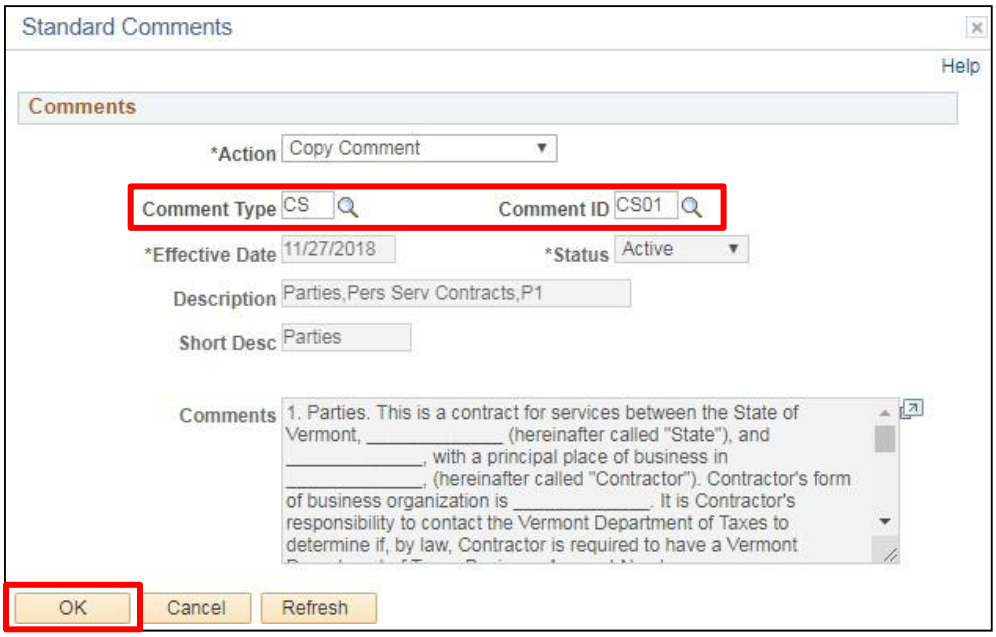
8. Click the **Add Comments** link

The **Contract Comments** window opens:



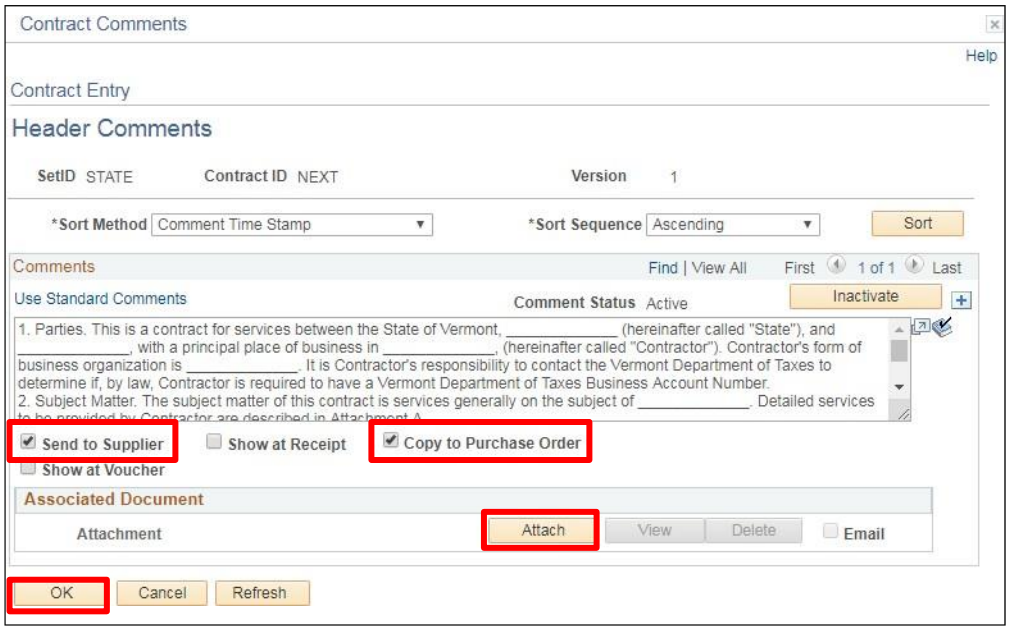
9. Enter all appropriate requirements and/or enter the Standard Comments
10. To enter Standard Comments, Click the **Use Standard Comments** link

The **Standard Comments** page displays:



11. **Comment Type -** Standard Comments for service contract have a **Comment Type = CS** or use the magnifying glass to select the appropriate comment type
12. **Comment ID -** Use the magnifying glass to select the Comment ID(s) you wish to include
13. Click **OK -** The comments will be copied into your contract and active for entry of specific information

You are returned to the **Contract Comments** page:

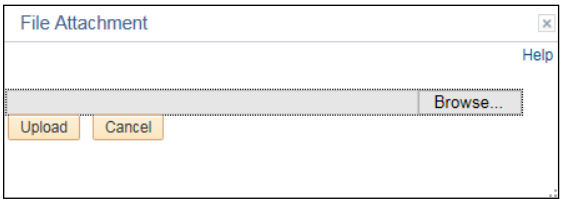


14. Click on the **Send to Supplier** checkbox for comments to be seen on a printed copy of the Contract

15. Click on the **Copy to Purchase Order** checkbox for comments to be seen on a printed copy of the PO

16. If you need to add an Attachment to be included with the standard comments, click the **Attach** button

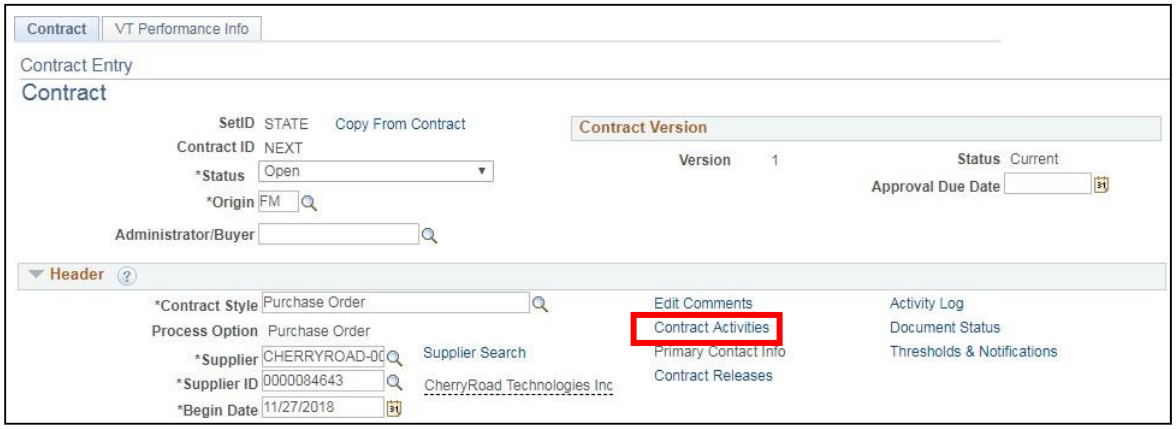
The **File Attachment** box opens, browse to find file attachment and click upload



If you have questions about which Standard Comments should be used, please contact BGS Purchasing and Contract Administration at 828-2211.

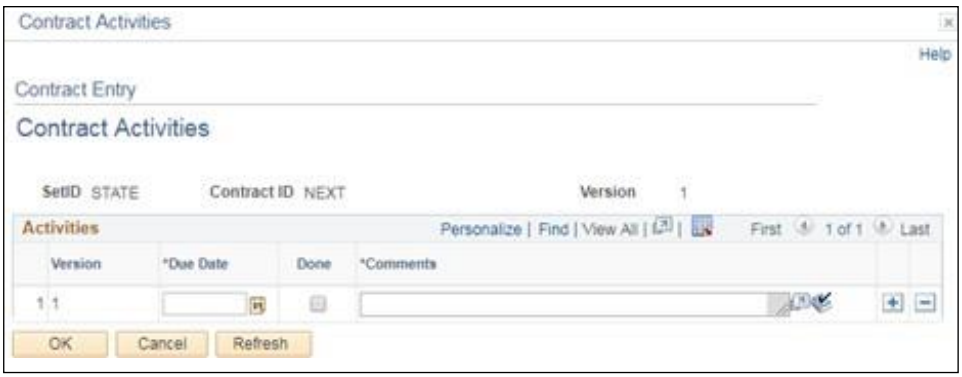
17. Click **OK**

You are returned to the **Contract Entry** page:



18. Click the **Contract Activities** link to view additional information

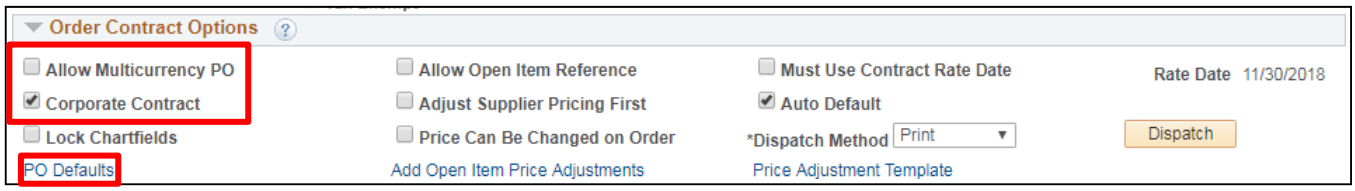
The **Contract Activities** page displays:



This is the page where **all contract activity**, such as approvals and amendments, **MUST** be recorded. This information is required. You should also include initials of the person who updated this information. Example(s): "Approved on 11/27/18 with signatures. ET" "Amended 12/01/18 to add Section 3. ET"

In the case of an amendment, provide a description of what was updated, and you **must** include the contract amendment number from the AA-14.

19. Click **OK -** Once the Maintain Contracts page returns, **uncheck** the Allow Multicurrency PO checkbox (SOV only processes transactions using US Dollars)

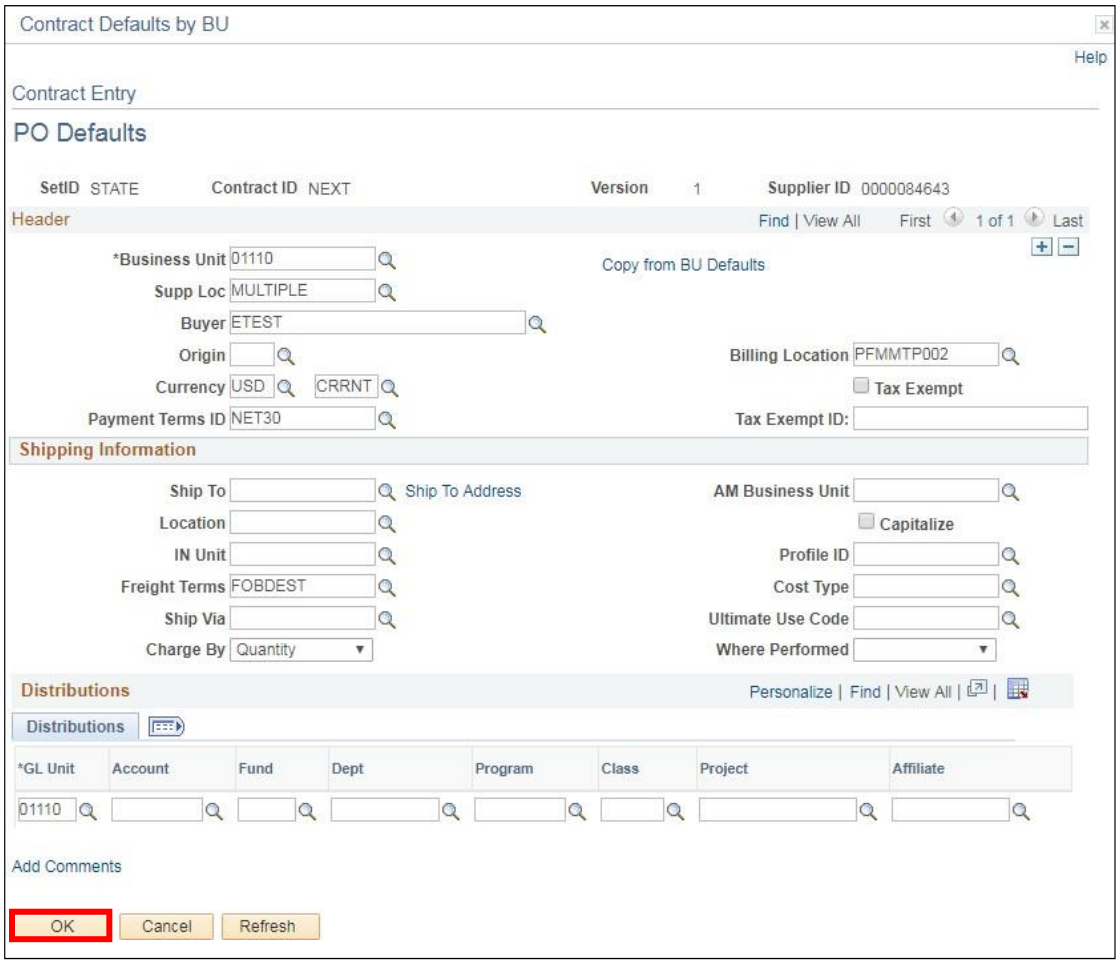


20. If you want to restrict use of the contract to your Business Unit only, uncheck the Corporate Contract checkbox and click on the PO Defaults link to enter dept specific information

21. Departments with contracts that serve multiple PO business units should leave Corporate Contract checked

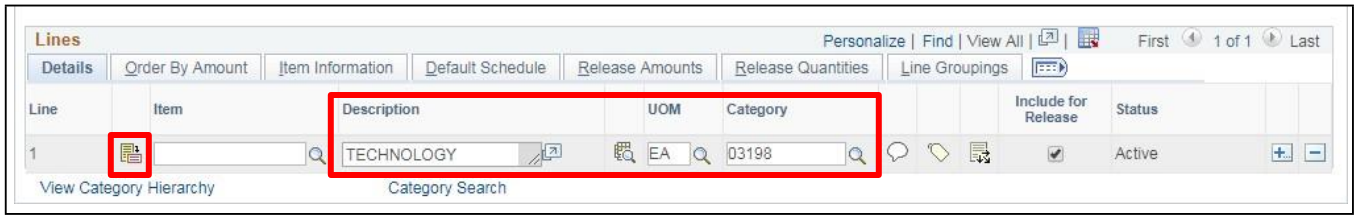
22. Click the **PO Defaults** link

The **Contract Defaults by BU** page displays:



23. Enter all appropriate defaults and click **OK**

The **Maintain Contracts** page displays:



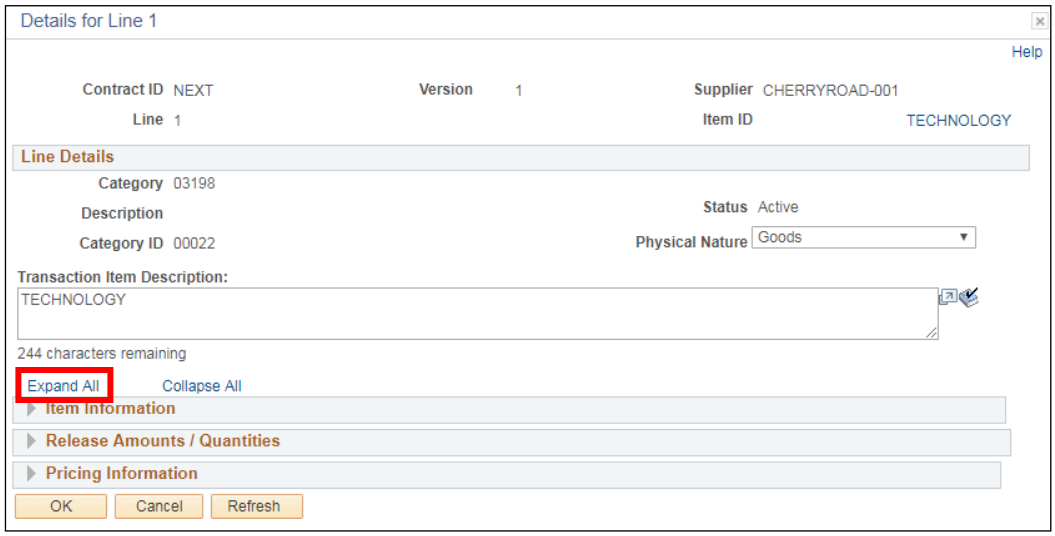
24. Description - The description field for the services provided on all Personal Services contracts must be descriptive enough to ascertain the type of service being provided. Entering descriptions such as “Contractual Services”, “Third Party Services”, department name or acronym is NOT sufficient

25. UOM (unit of measure) - use the magnifying glass for look up

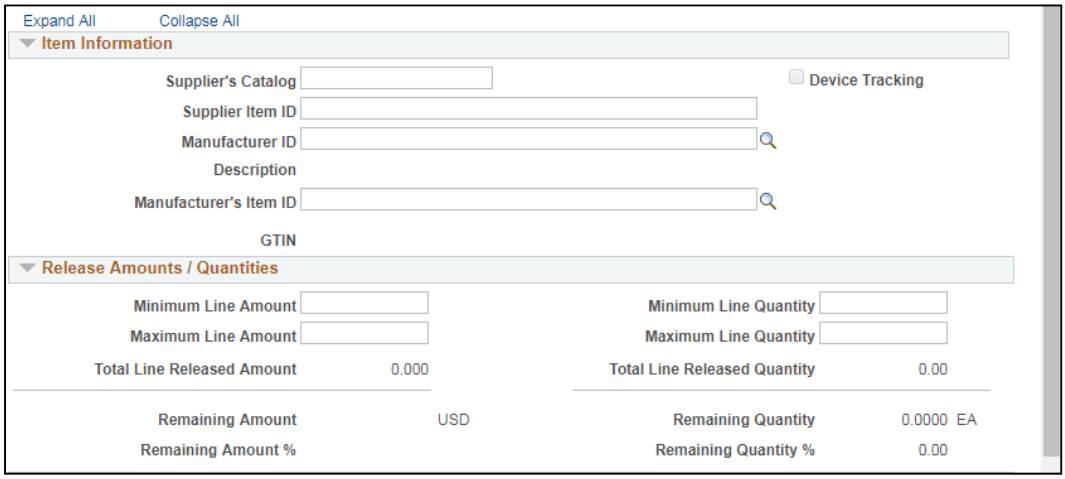
26. Category - use the magnifying glass for look up

27. Click on the **Line Details** icon to the left of the Item field

The **Details for Line 1** page displays:

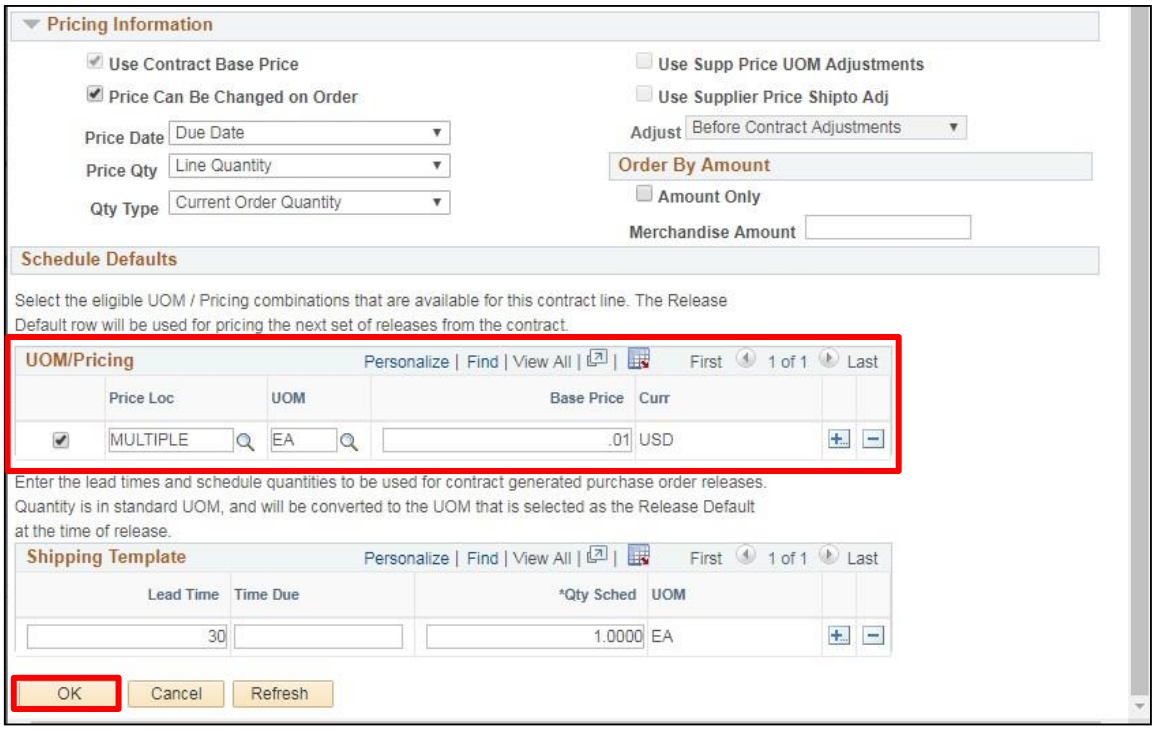


26. Change the Physical Nature as appropriate for the contract and Click the **Expand All** link



27. Enter any appropriate **Min/Max Line Amount** information as well as Min/Max Line Qty information (this information is contract line specific and is optional)

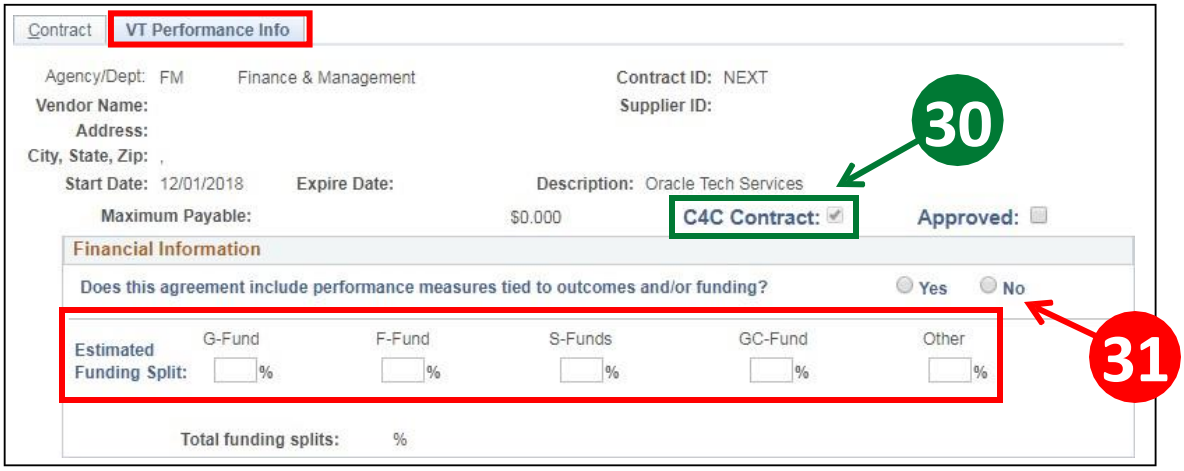
28. Select the **Price Can Be Changed on Order** checkbox - if you want to be able to change the system calculated price on POs for this contract. If you do not select this option, the price field on the PO is unavailable to change



29. Enter a Base Price amount **Note: Base Price must be entered with dollar amount of .01 or greater** – If the price can be changed on order, the checkbox is marked for this line, it is the user's choice on the UOM Base Price Amount. If the "Price Can Be Changed on Order" checkbox is NOT marked, enter the per unit price

30. Click **OK**

You are brought back to the **Contract Entry** page, click on the **Performance Info** tab:



The Performance Info page must be filled in for all contracts that are challenges for change contracts (C4C). Contracts with a start date >= 07/01/10 are automatically designated as challenges for change contracts. Contracts with a start date <= 06/30/10 can be designated as challenges for change contract by clicking on the C4C box.

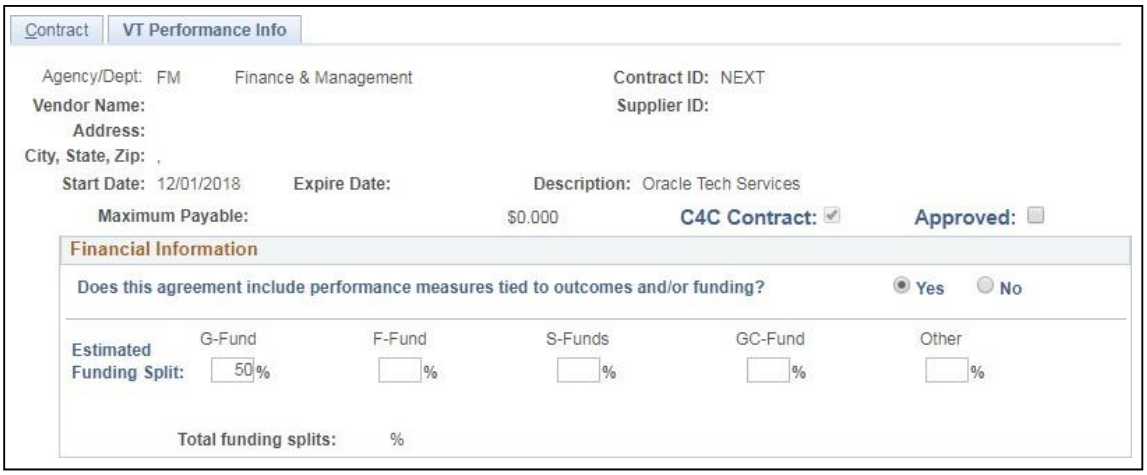
Note: The Information above the Financial Information area is filled in from the Contract page

30. The C4C (challenges for change) box is checked and grayed out as will be the default for all contracts entered with a start date >= 07/01/10

31. A "Yes" or "No" must be selected for the question of '**Does this agreement include performance measures tied to outcomes and/or funding?**'

32. Estimated Funding Split: Enter the percentage in the appropriate area for what fund or funds the contract amount will be spent against. The Total funding splits will automatically calculate and must equal to 100%. If part or all the funding source falls under "Other", a description of the funding source must be entered in the text box that opens

Note: For contracts that can be used throughout the state, such as Purchasing and Contract Administration contracts with an origin code of CP or CPS or master contracts such as those for Marketing and DII, if the funding source cannot be determined then use 100% "Other". A suggested description of the funding source to enter into the text box would be "Central Purchasing" or "Master"



General Procurement Information section:

33. The Process used field and the Agreement type field must be filled in based on information gathered from the AA-14 form

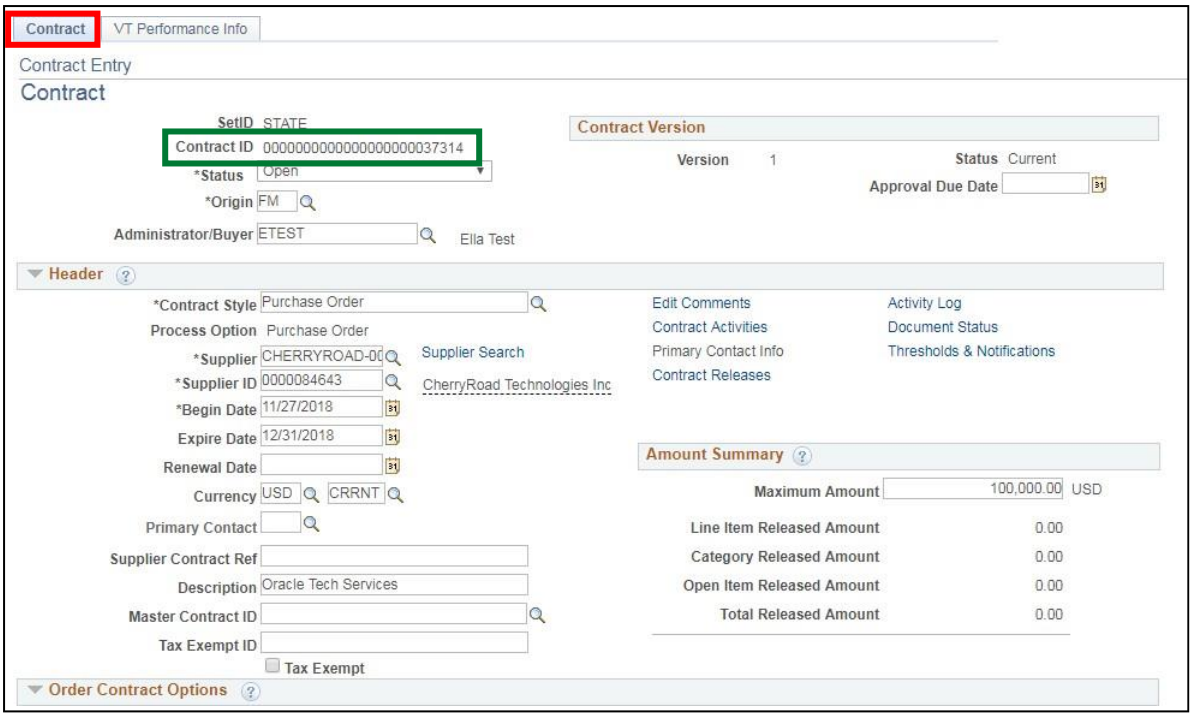
34. Approved checkbox -This box must be checked when all sections of the VT Performance Info page are complete. This page must be approved before the contract can be approved

Note: Only VISION users with the security to approve contracts can approve the performance info page

35. Click back on the **Contract** tab

36. Click **Save**

A **Contract ID** number is assigned:



37. Follow the specific controls in place in your department for contract approval of both the performance info page and the contract page. A purchase order can be applied to the contract only if it is in Approved status

Entering a Service Contract is Complete

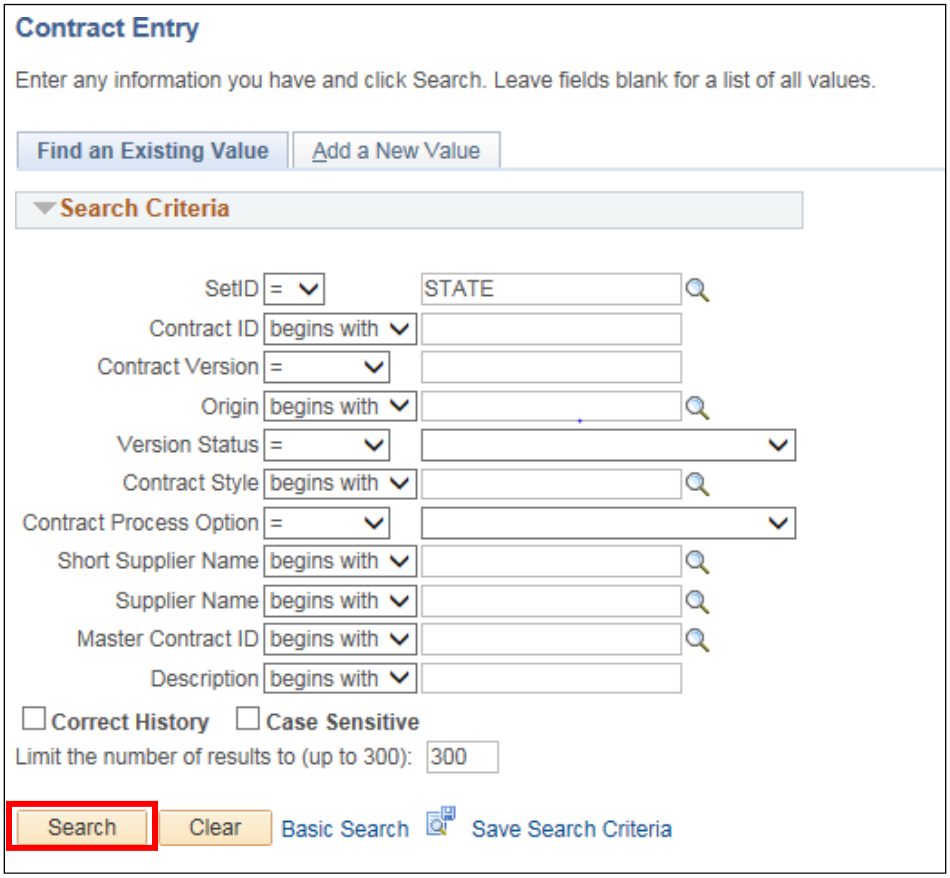
Define Contract Alert Notification Parameters for a Contract

Possible situations when this function is used: Individuals responsible for Contract Maintenance have the need to identify Contracts that are nearing renewal, expiration, approval or maximum amount. Contract Alert Notifications can provide directed email messages for contracts that are nearing renewal, expiration, approval or maximum amount.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Contracts > Add/Update Contracts

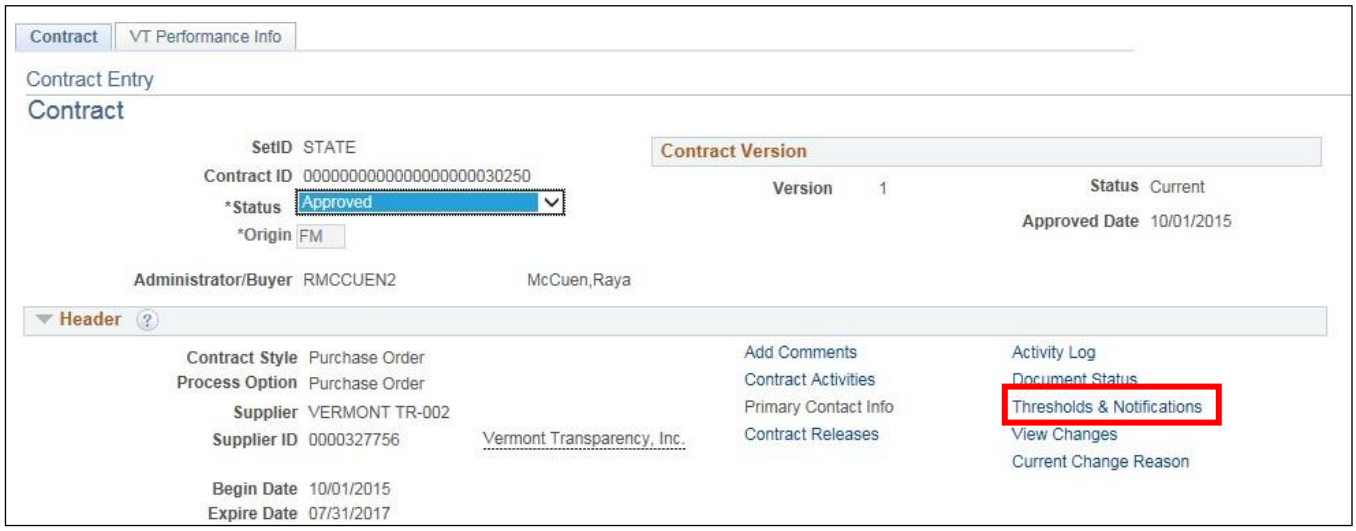
Navigator Menu navigation: Procurement Contracts > Add/Update Contracts

The **Contract Entry** page displays, click on the **Find an Existing Value** tab:



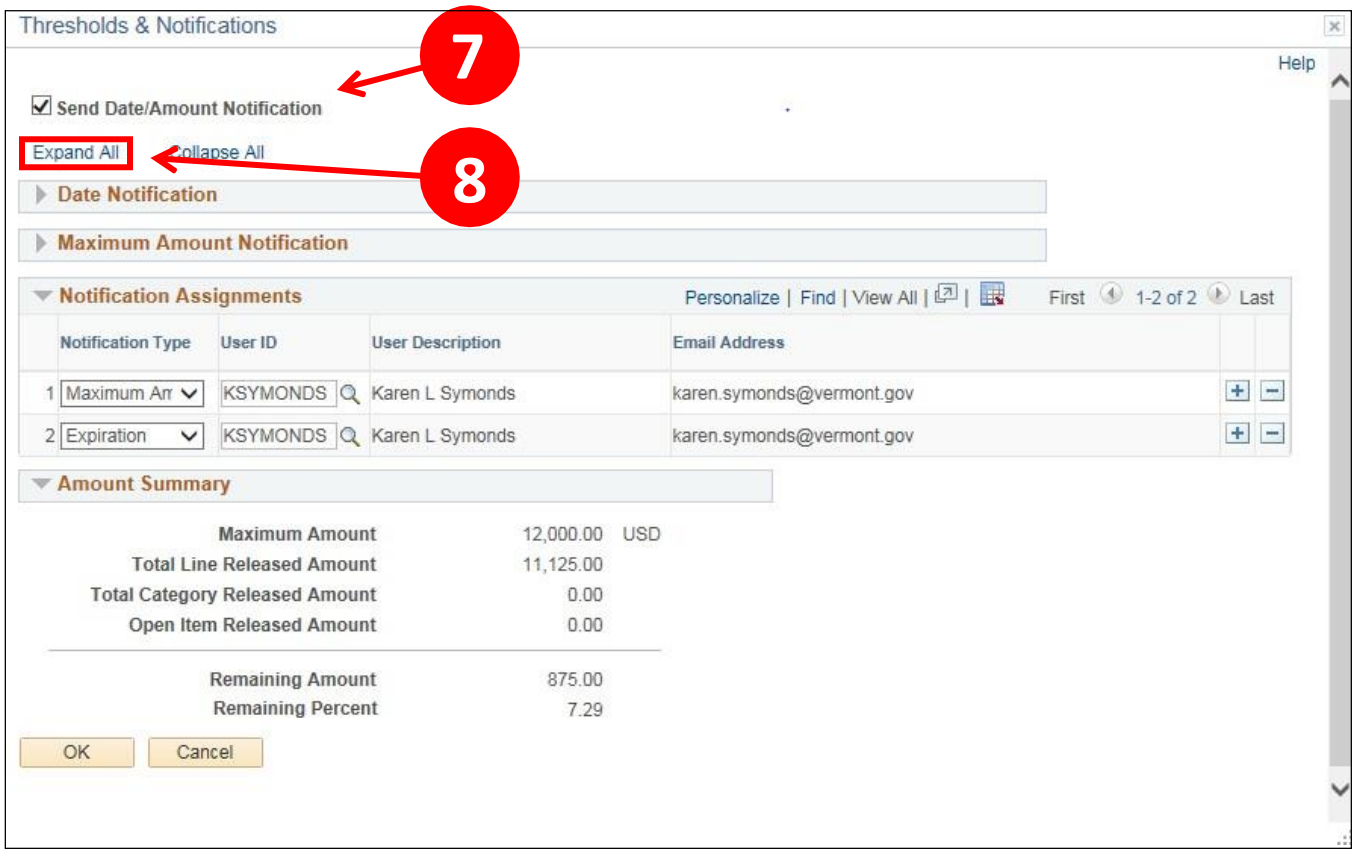
1. **Contract ID -** Enter a Contract ID number
2. **Contract Process Option -** Should always be Purchase Order
3. **Origin** - Your depts. origin code - **You should at least enter your dept.'s origin code to keep the search results more manageable**
4. **Short Supplier Name -** Enter Short Supplier name if known
5. Click **Search**

The **Contract Entry** page displays:



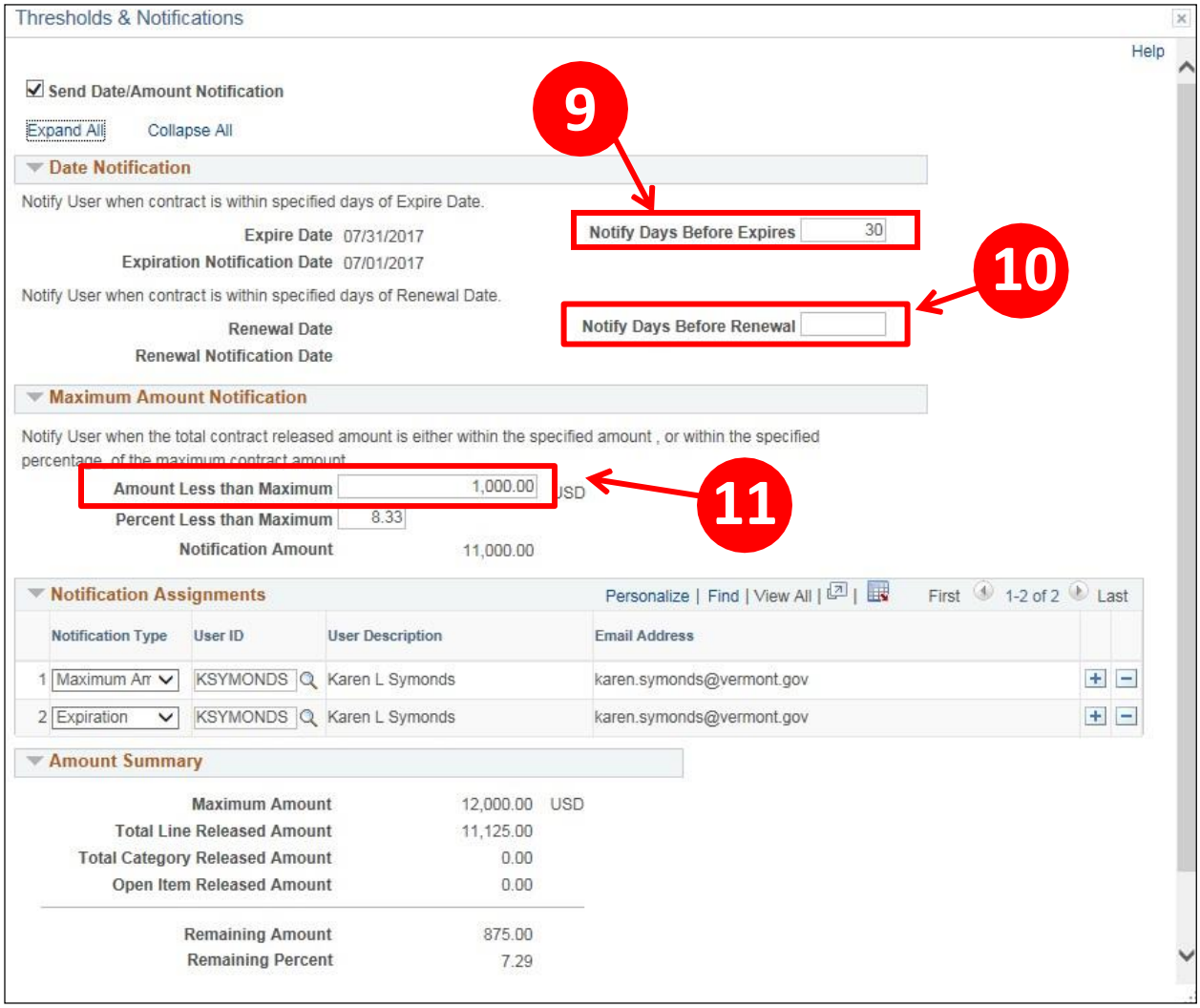
6. Click the **Thresholds & Notifications** link

The **Thresholds & Notifications** page displays:



7. Click the **Send Date/Amount Notification** checkbox
8. Click the **Expand All** link

The **Date Notification** and **Maximum Amount Notification** sections expand:

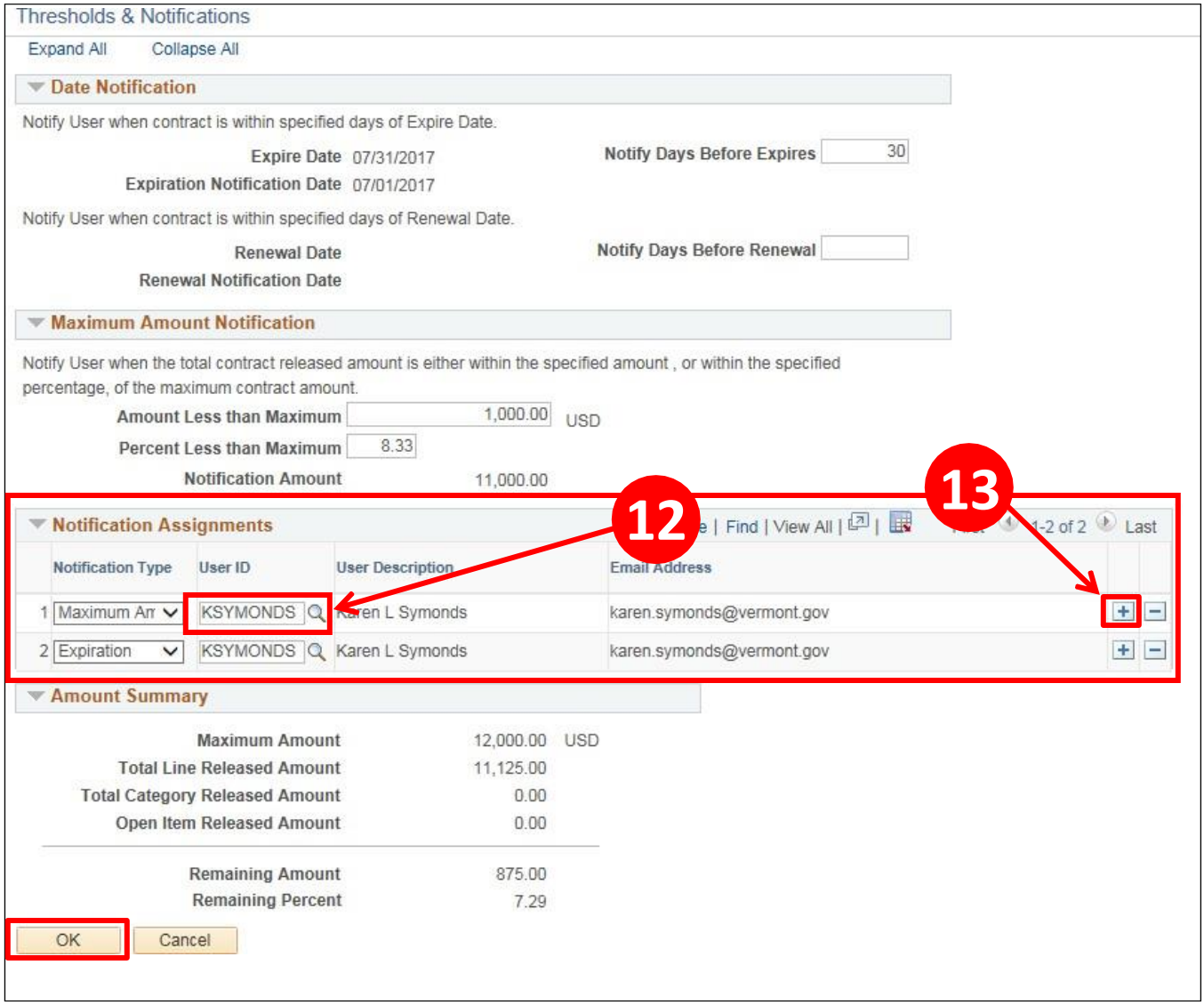


9. For a notification on Expiration Date, enter a value in the Notify Days Before Expires box. (Note that the Expire Date of the Contract is displayed in this box. This value entered represents the Number of Days prior to this Expiration Date that the notification should be generated)

10. For a notification on Renewal Date, enter a value in the Notify Days Before Renewal box. (Note that the Renewal Date of the Contract (if applicable) is displayed in this box. This value entered represents the Number of Days prior to this Renewal Date that the notification should be generated)

11. For a notification on Maximum Amount, enter a value in the Amount Less than Maximum box. (Note that the Maximum of the Contract is displayed in this box. This value entered represents the dollar amount less than this maximum amount that the notification should be generated. Also note that the Percent Less than Maximum is automatically calculated based on this dollar amount)

To select the specific users that should receive a notification, first identify the Notification Type in the Notification Assignments section. (Note that the various types of notification include: Approval Due Date, Expiration, Maximum Amount and Renewal.)

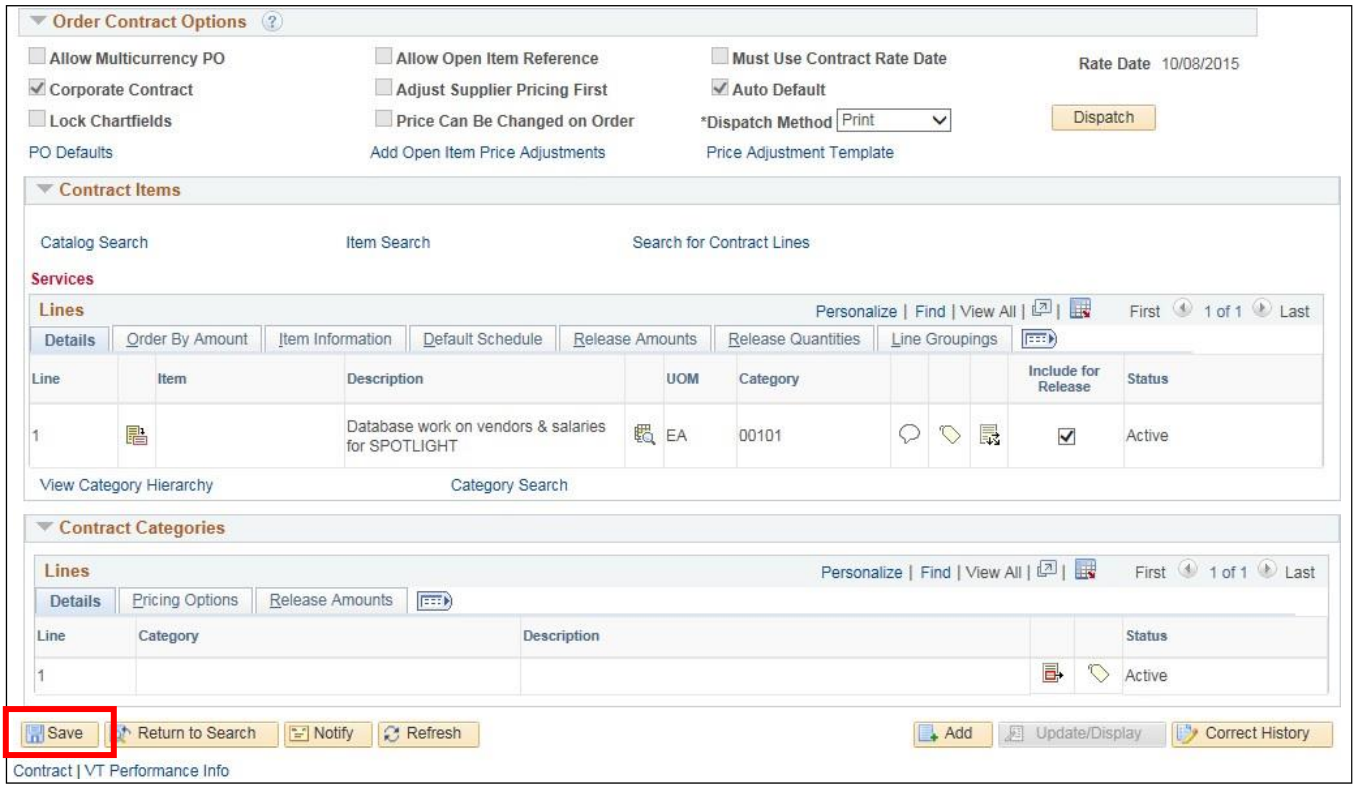


12. Select the User ID for the Notification Type via the User ID lookup. After you select the user, you will see the User Description and Email Address are then displayed

13. To specify an additional Notification Assignment, click the plus sign icon in the Notifications Assignments section, and then specify the Notifcation Type and User ID (Step 12). (Note that you can have multiple Notification Types for the same User ID, or multiple User IDs for the same Notification Type based on your specific needs for the Contract)

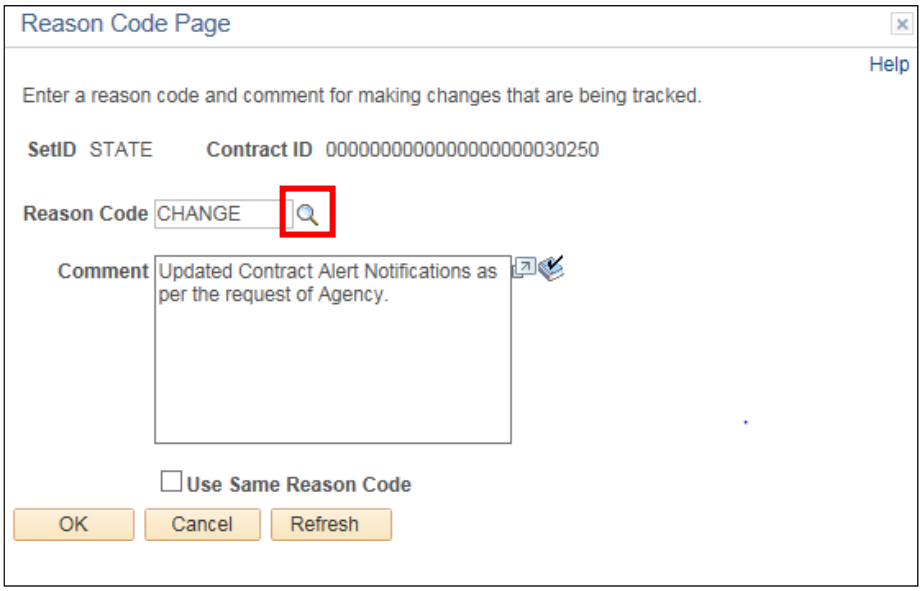
14. Click **OK**

You are returned to the **Contract Entry** page:

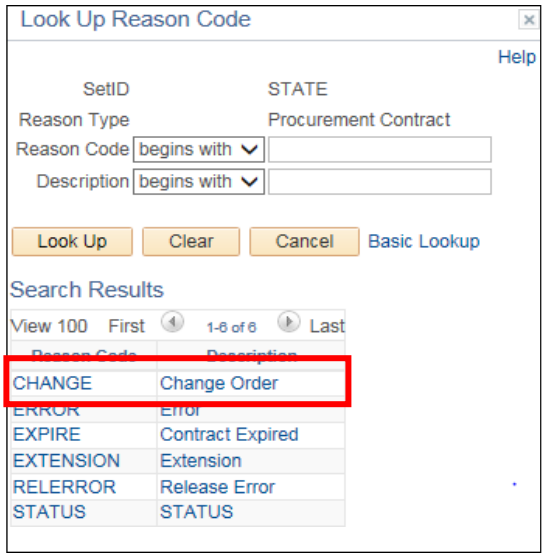


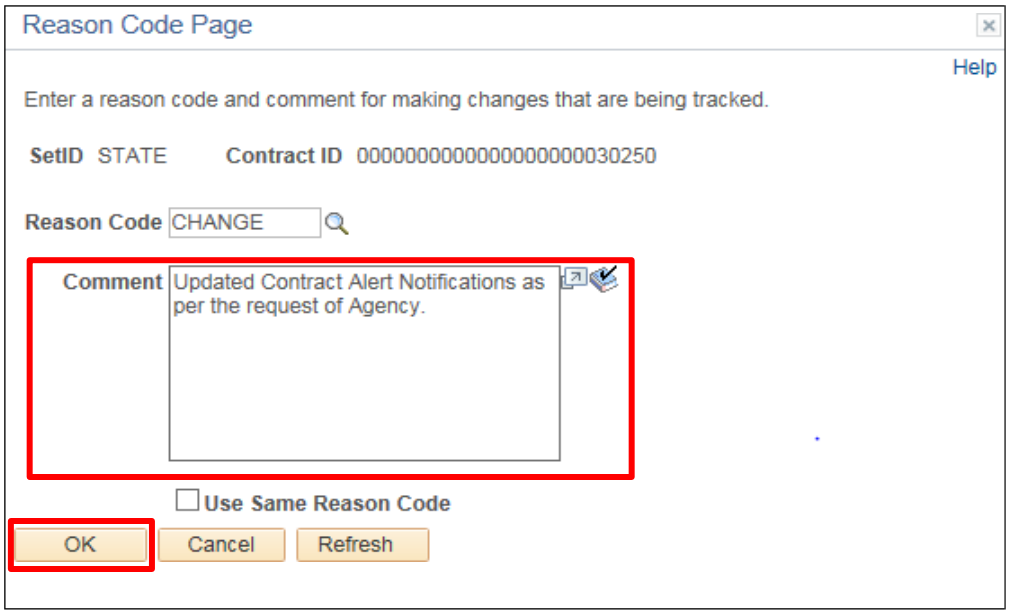
15. Click the **Save** button to save the **Contract**

A Reason Code page will appear to allow you select a Reason Code and enter Comments related to the changes made for the Contract Thresholds and Notification:



16. Select a **Reason Code** by clicking the magnifying glass icon to display all eligible values





17. To enter further description related to your change, you can enter comments in the Comment box

18. Click **OK** to return to the Contract Entry Page

The **Contract** is now saved with the defined Contract Alert Notifications.

Note – The steps above to set up contract alert notifications can also be executed at the time a new contract is added.

Note – The contract alert process will run nightly to produce notification emails. You must have "Email User" checked under Workflow Attributes on your My System Profile page for contract notifications to be sent. If this is not check, no notification will be sent. It is also important to "mark as worked' any contract notification that you have received on your worklist once it has been addressed. Additional notifications for the same contract will not be sent unless all previous notifications have been "marked as worked".

Defining Contract Alert Notification Parameters for a Contract is Complete

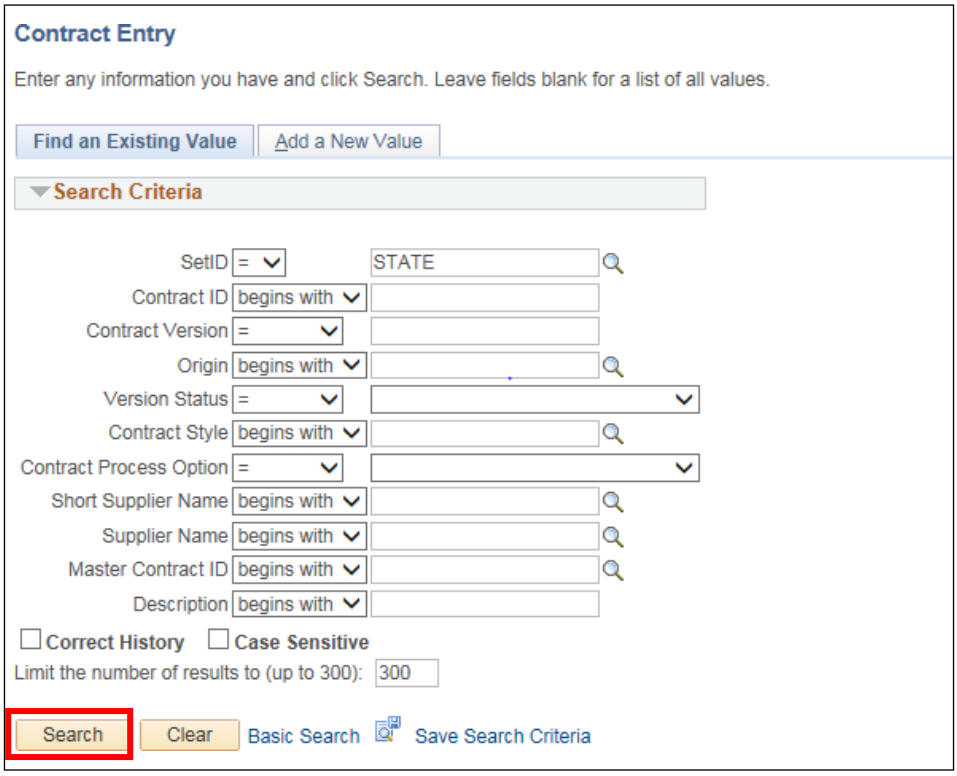
Create Contract Change/Amendment

Situations when this function is used: To extend the expiration date of a contract, to increase the maximum amount of the contract, or to designate a contract as a challenge for change contract. This should only be done after all required signatures have been obtained for the contract amendment.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Contracts > Add/Update Contracts

Navigator Menu navigation: Procurement Contracts > Add/Update Contracts

The **Contract Entry** page displays, click on the **Find an Existing Value** tab:

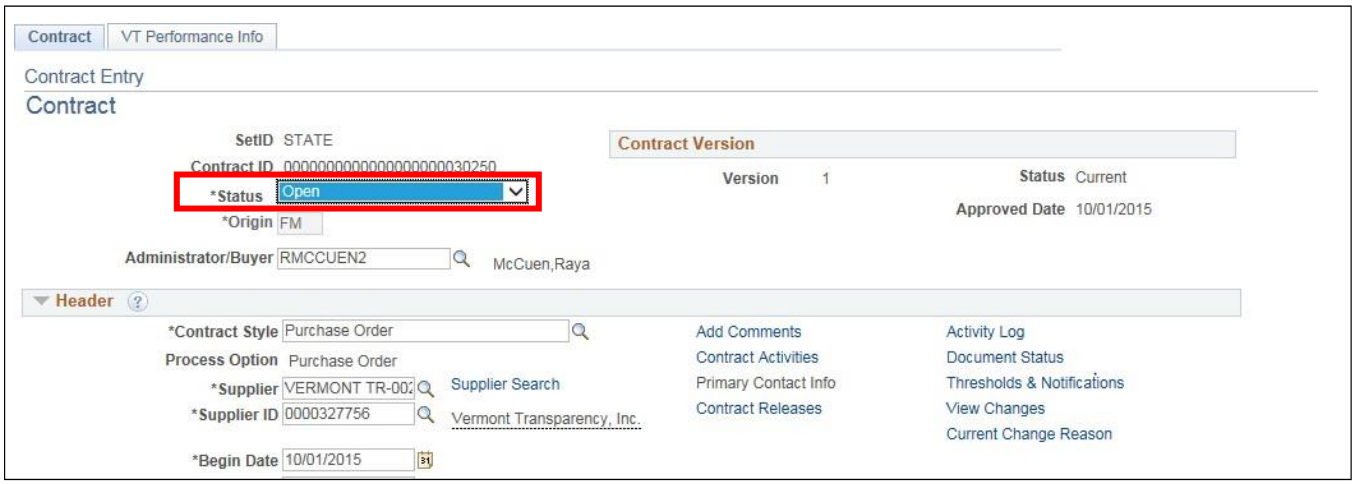


1. **Contract ID -** Enter the contract ID number
2. **Contract Process Option -** Should always be Purchase Order
3. **Origin -** Enter your depts. origin code
4. **Short Supplier Name -** Enter the short supplier name if known

   Note: You should <u>at least</u> enter your dept.'s origin code to keep the search results more manageable

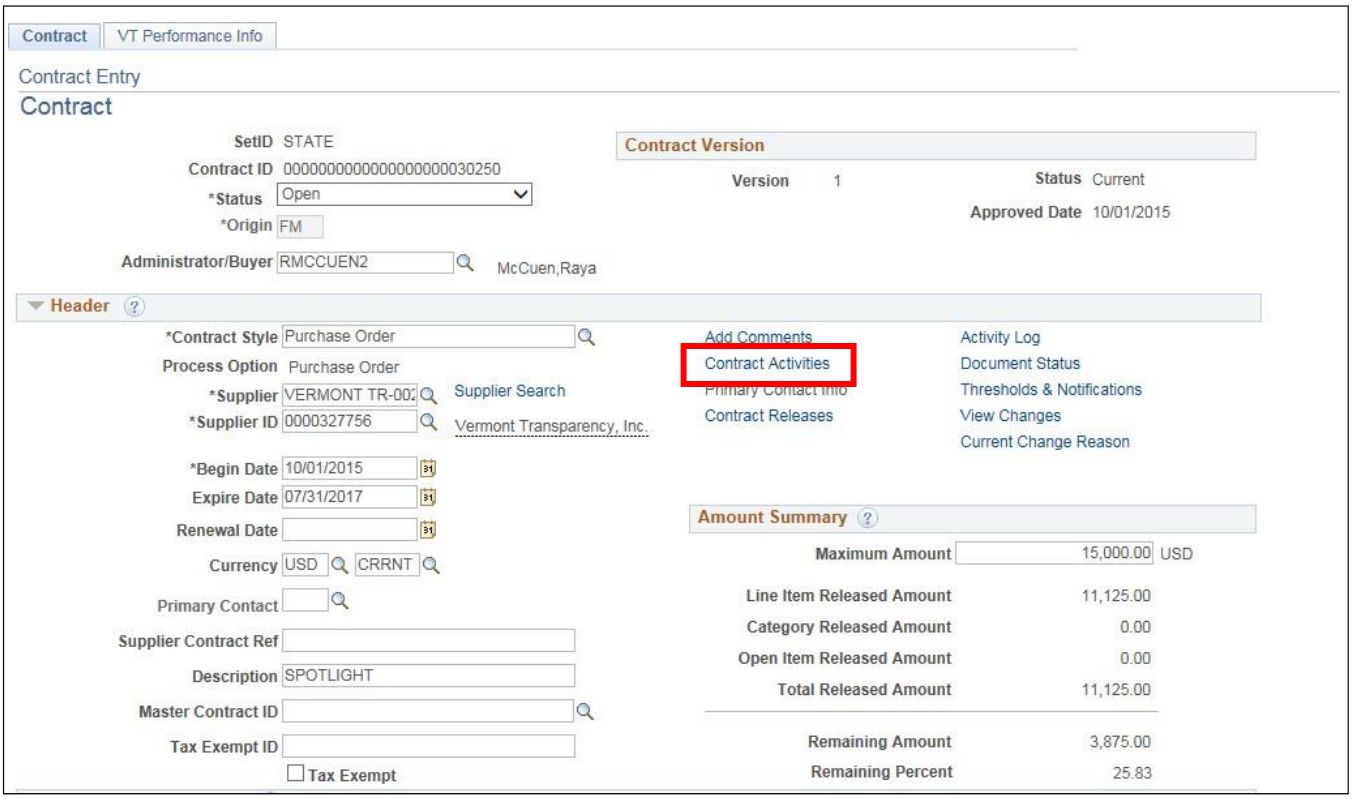
5. Click **Search**

The **Contract** page displays:



6. Change the Status to **Open**, this will allow access to fields on the contract for updates

In this example, the new contract maximum amount has been increased by $200,000 and the contract is now a "challenges for change" contract so the performance page must be filled out.



7. Click on the **Contract Activities** link

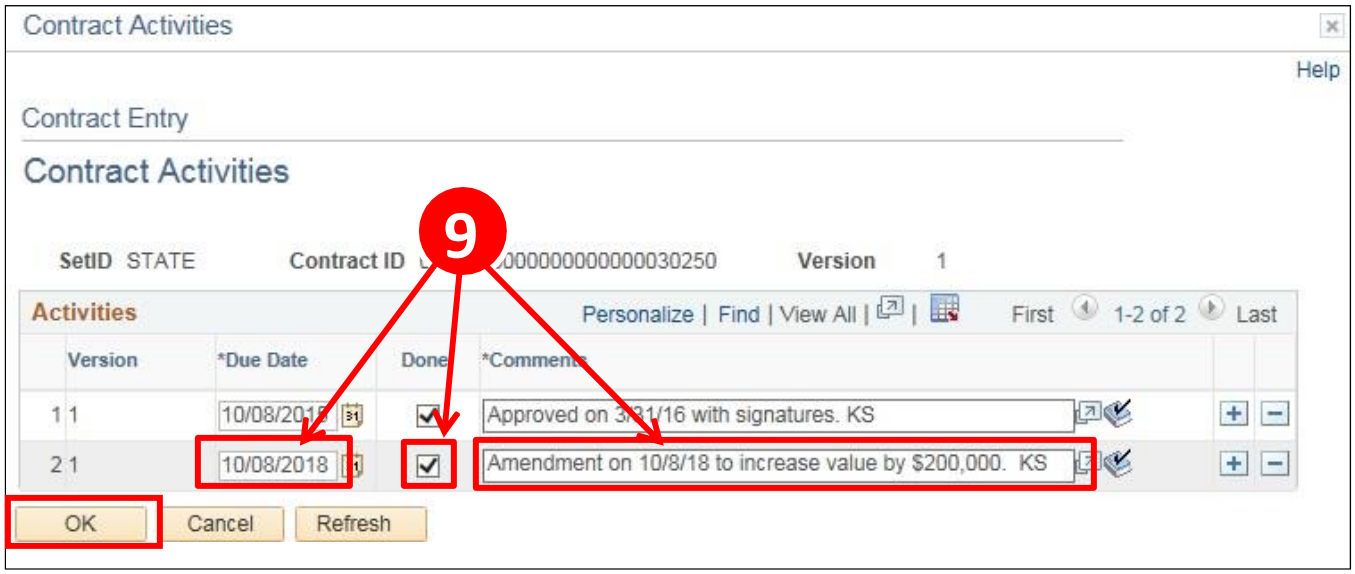
The **Contract Activities** page displays:

This is the page where **all contract activity**, such as approvals and amendments, **MUST** be recorded. This information is required. You should also include initials of the person who updated this information. For example: "Approved on 3/31/16 with signatures. KS" "Amendment #1 on 4/15/16 to increase maximum amount by $200,000 from $537,881.00 to $737,881.00. KS"

In the case of an amendment, provide a description of what was updated, and you **must** include the contract amendment number from the AA-14.

8. To insert a row click the plus sign **+** at the end of the row

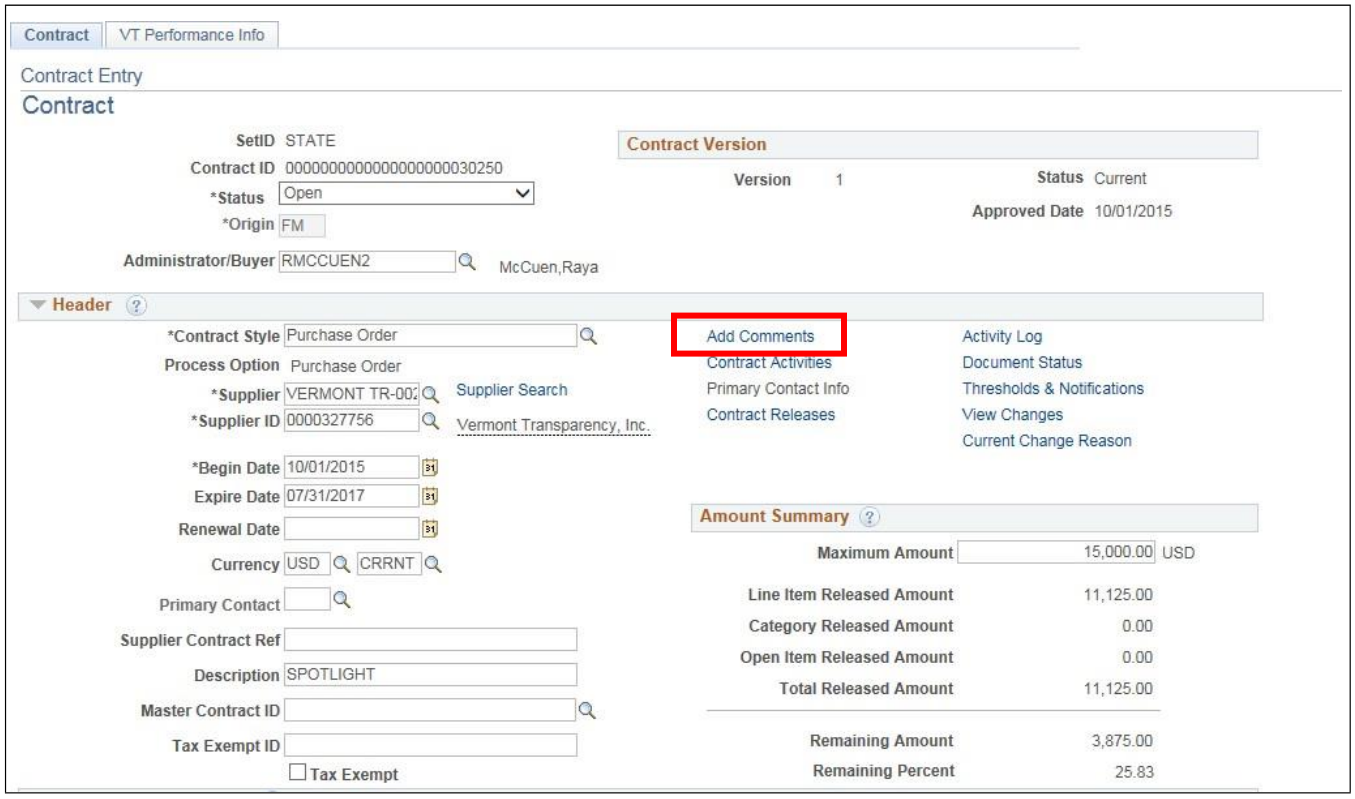
A new **Activities** line opens:



9. Enter the current date in the **Due Date** field, check the **Done** box, enter all comments related to this amendment

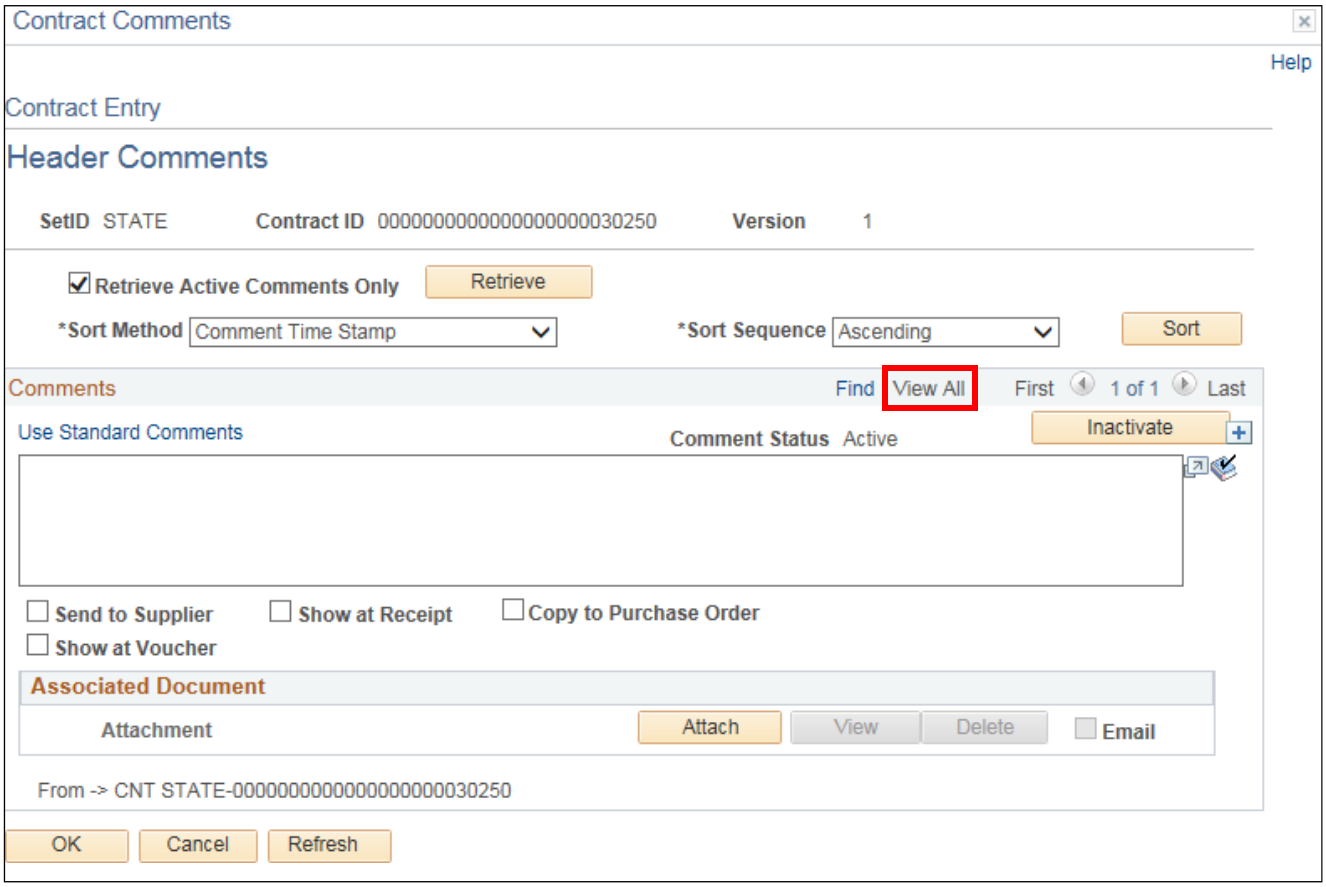
10. Click **OK**

The **Contract** page displays:

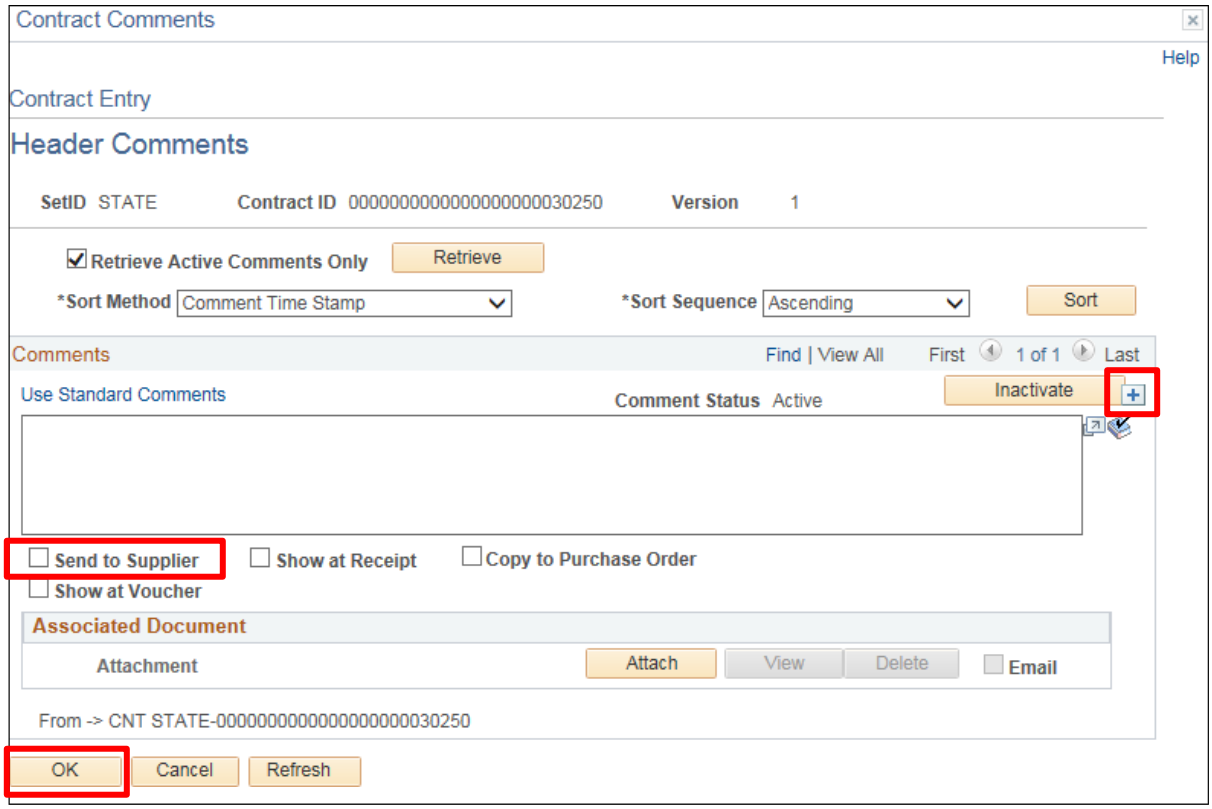


11. Click on the **Add Comments** link

The **Contract Comments** page displays:



12. In the Comments line click **View All** (if available). If there are multiple comments, all comments will appear on the page

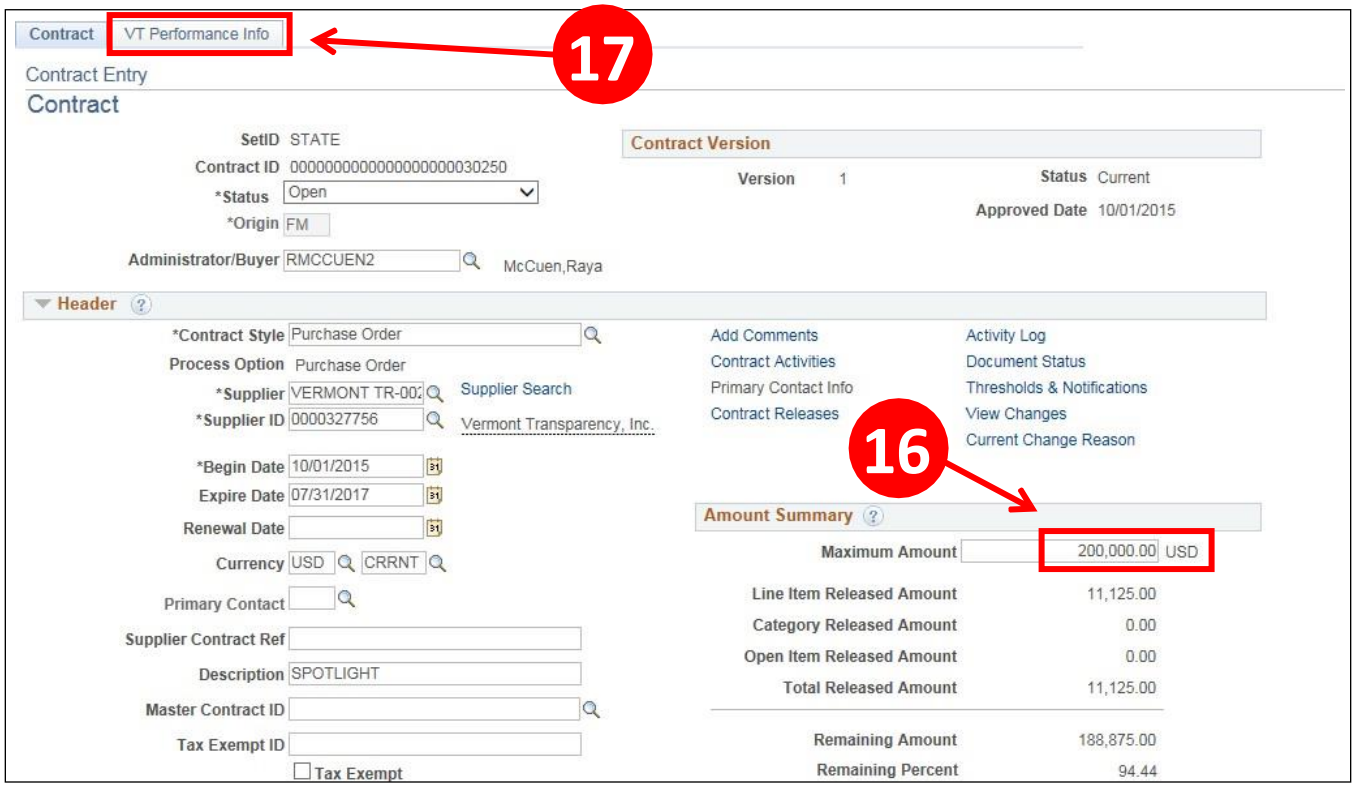


13. Place your cursor in the last comment text box and click on the plus sign on the right side of the screen. This will insert a row for you to add the comments about the amendment. In this example there is no need to insert a row as the current row is blank. These comments can either be typed in again or copied from the Contract Activities link and pasted in the new row

14. Click on **Send to Supplier** if the comments should be displayed on the contract when it prints.

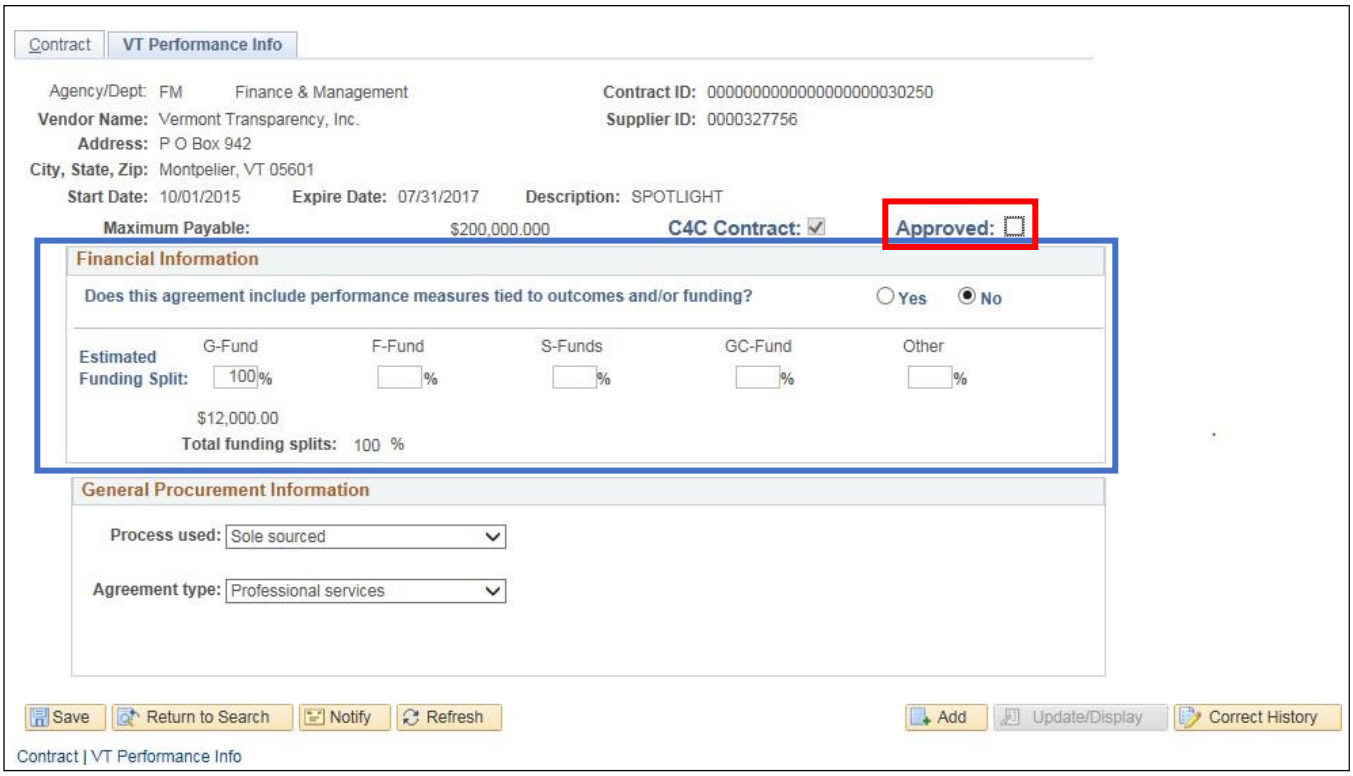
15. Click **OK**

You will be returned to the **Contract** page:



16. Change the Maximum Amount from $15,000.00 to $215,000.00. **Note: If you have set a maximum line amount you must also update that:**

17. Click on the **Performance Info** tab

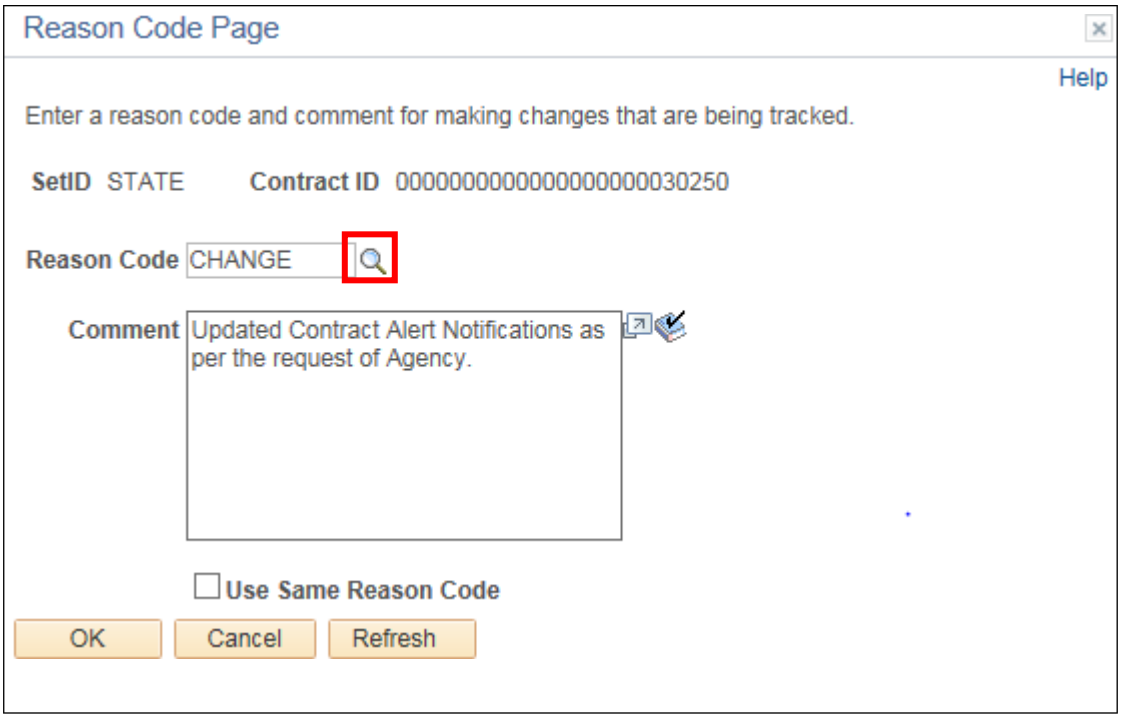


This contract does not have a start date of <=6-30-10, therefore the C4C box automatically designating the contract as a challenge for change contract is checked off.

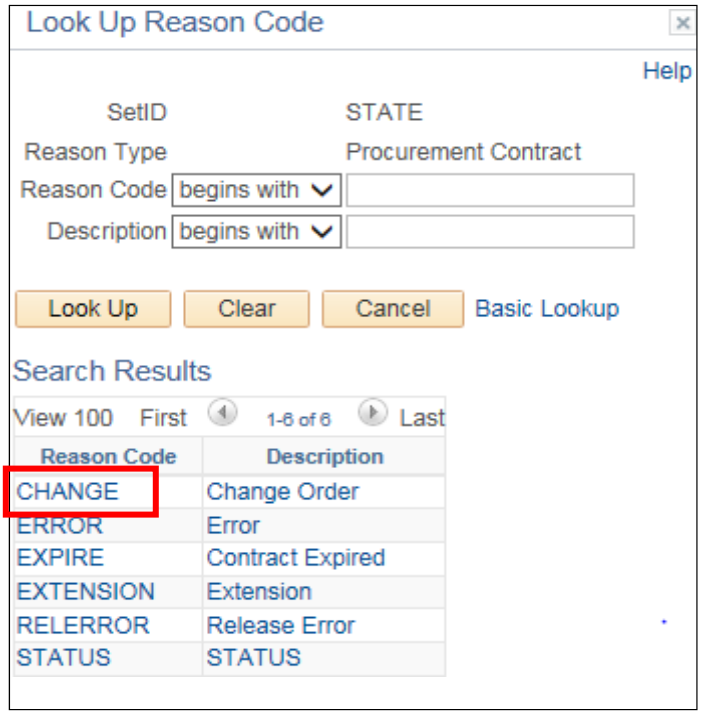
Note: Once the C4C box has been checked the Financial Information section must be completely filled out. The "Yes" or "No" button must be selected, and the Estimated Funding Split must total 100%. If "Other" is chosen as a funding source a text box will open and a description of the funding source must be entered. The performance Info page must be approved before the changes to the contract can be approved.

Review the Financial Information section to see if any updates should be made to the Process used field and the Agreement type field.

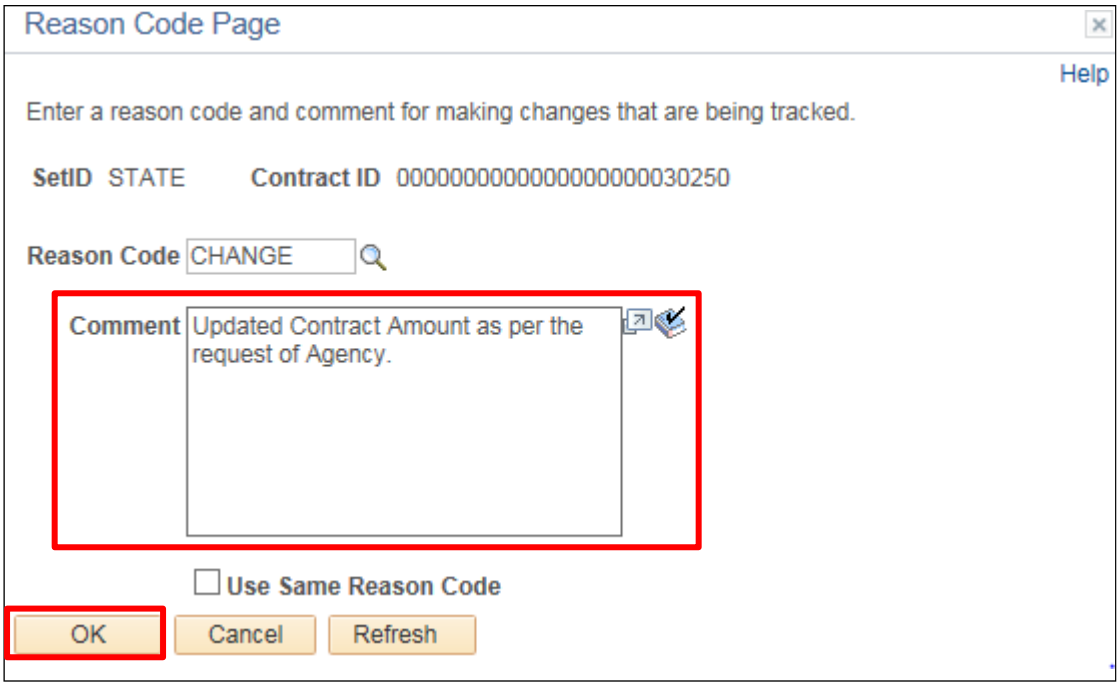
18. Click the **Approved** checkbox. A **Reason Code** page will appear to allow you select a Reason Code and enter Comments related to the changes made for the Contract Thresholds and Notification



19. Select a **Reason Code** by clicking the magnifying glass icon to display all eligible values



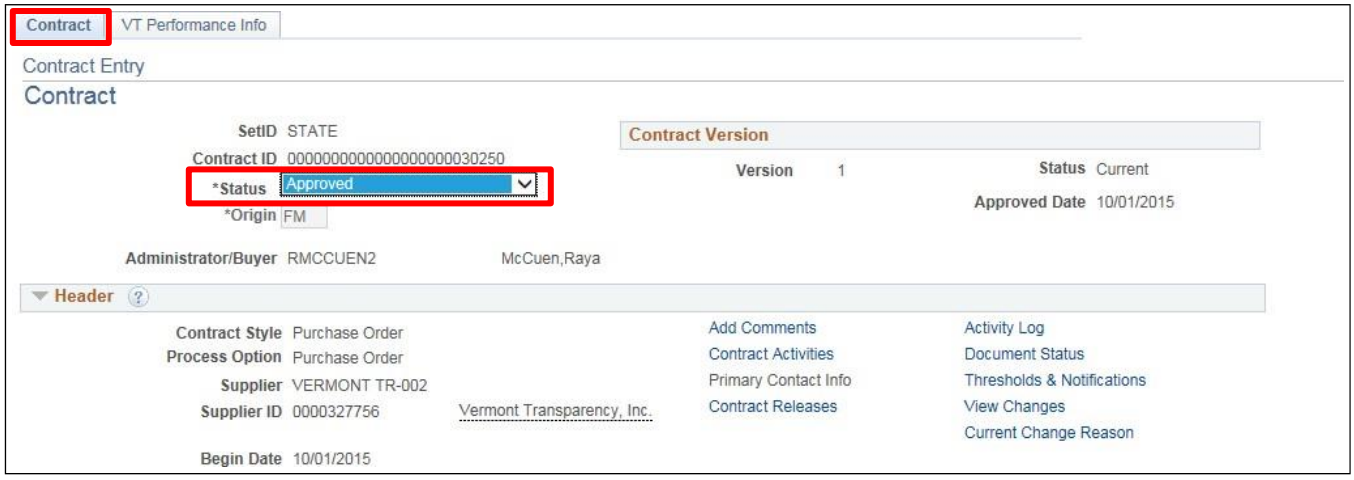
20. Click on the appropriate reason code. (Note that after you select the Reason Code, the Comment box will display a default value)



21. To enter further description related to your change, you can enter comments in the **Comment** box.

22. Click **OK**

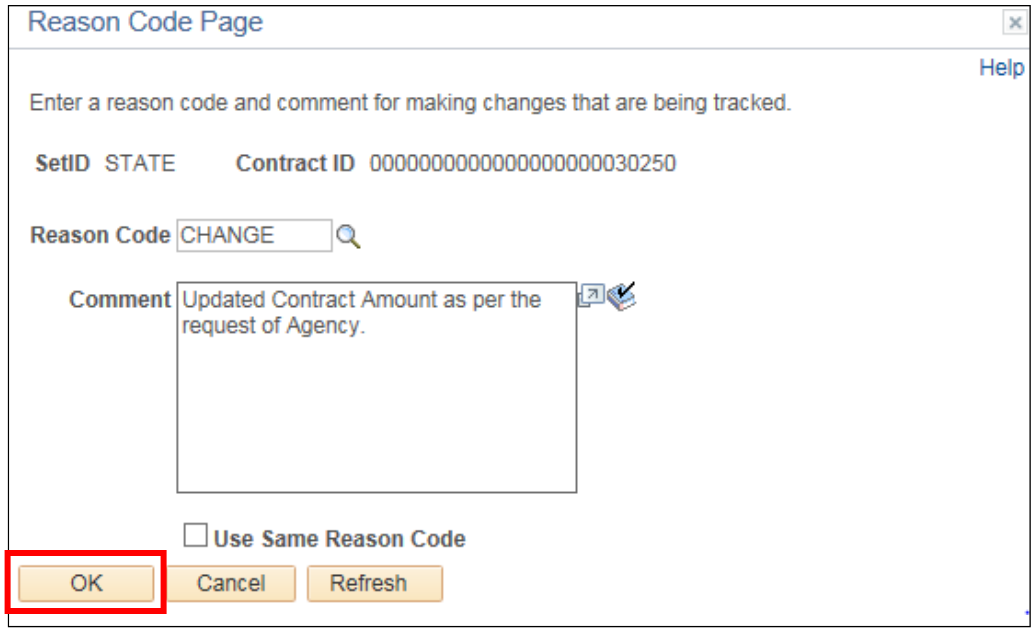
You are returned to the **VT Performance** Info page:



23. Click on the **Contract** tab

24. Change the Status of the Contract to **Approved**

25. Click **Save** at the bottom of the page. Reason Code page appears with the Reason Code and Comments entered during the update of the Approved checkbox of the VT Performance Info Page



26. Click **OK**

You are returned to the **Contract Entry** page.

Follow your department's internal control procedures for approval of the performance info page and the contract.

Creating a Contract Change/Amendment is Complete

Print/Dispatch Contract

A Contract can be dispatched (printed) using the "Dispatch Contracts" selection from the menu after the contract has been approved and saved. General contracts cannot be printed/dispatched.

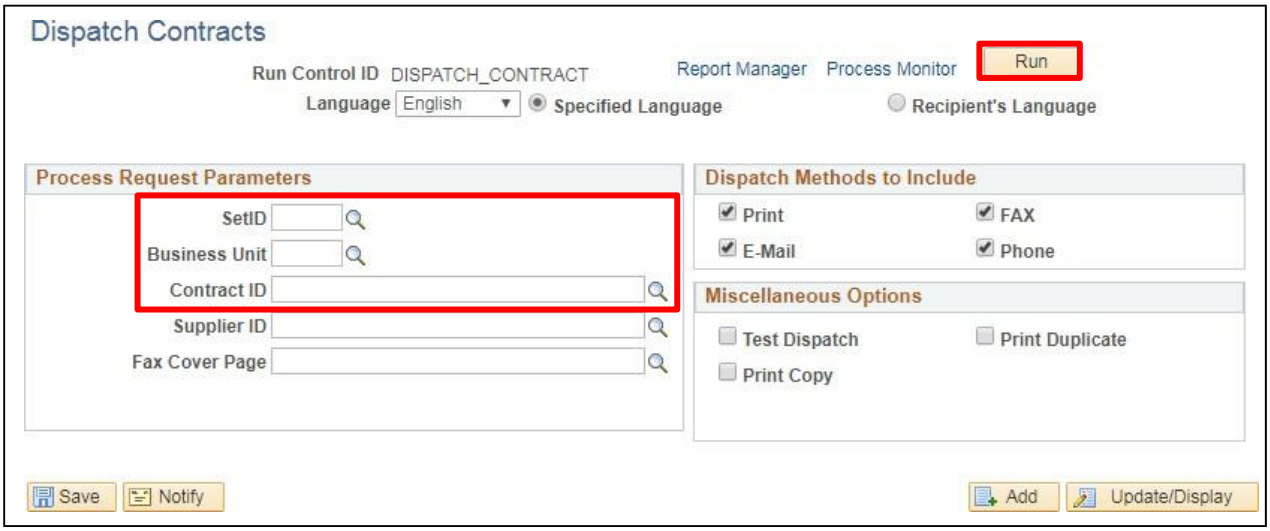
WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Contracts > Dispatch Contracts

Navigator Menu navigation: Procurement Contracts > Dispatch Contracts

The **Dispatch Supplier Contracts** page displays, click on the **Add a New Value** tab:

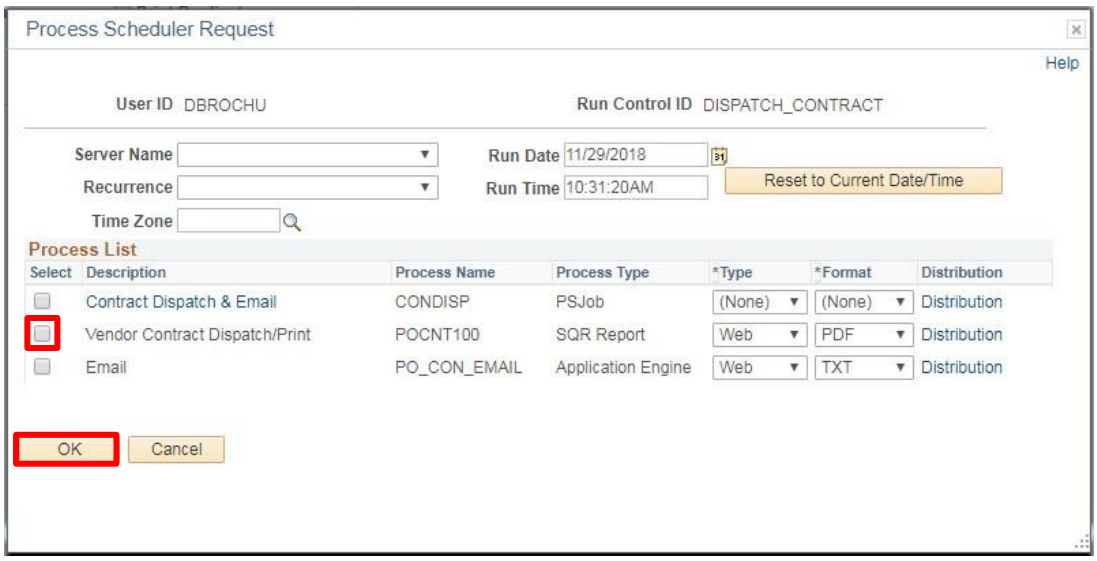
1. **Run Control ID -** Enter a new run control ID, ex: DISPATCH_CONTRACT
2. Click **Add**

The **Dispatch Contracts** page displays:



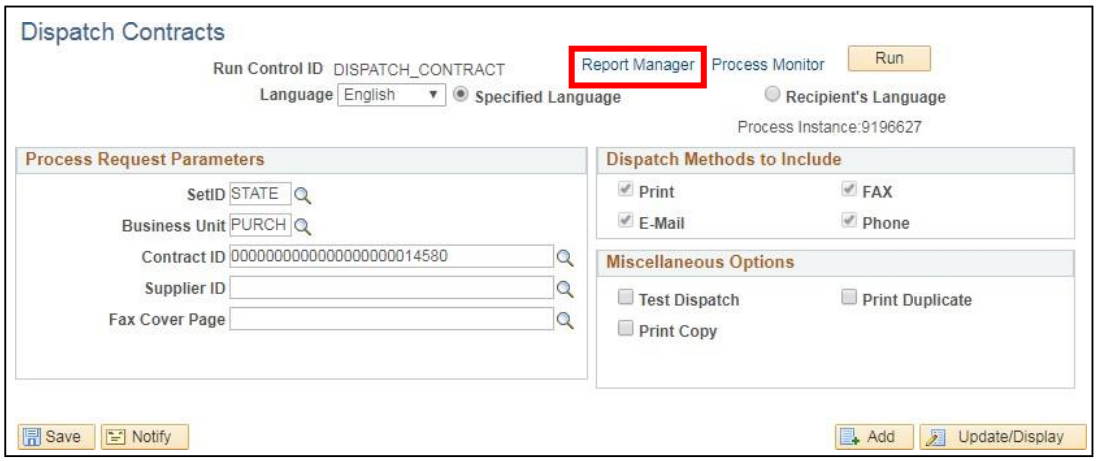
3. **Set ID -** Enter STATE
4. **Business Unit - For CPS users only** - To print a **CP** or **CPS** contract, enter "**PURCH"** for the business unit. If this is a CP or CPS contract and you want to print it but don't have the PURCH option, then leave the business blank. The contract will print, and the only difference will be the State of Vermont address in the left-hand corner will not appear. If this contract originates from your Department, enter your Business Unit
5. **Contract ID -** Enter Contract ID #
6. Click **Run**

The **Process Scheduler Request** page displays:



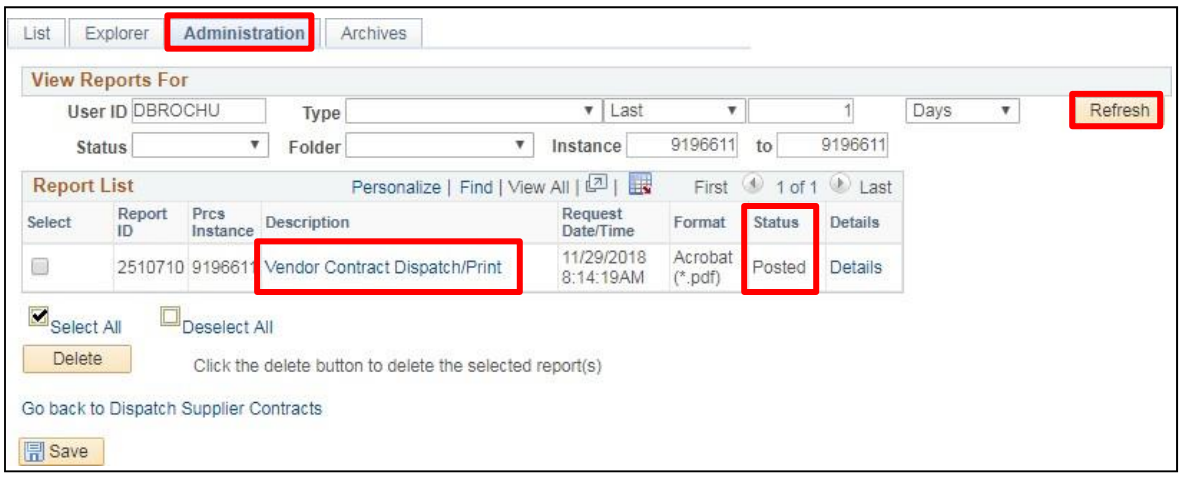
7. Select the **checkbox** next to Vendor Contract Dispatch/Print (POCNT100)
8. Click **OK**

The **Dispatch Contracts** page displays:



9. Click the **Report Manager** link

The **Report Manager** page displays, click on the **Administration** tab:



10. Click Refresh until the **Status = Posted**. Once the status = Posted, click on the **Vendor Contract Dispatch/Print** link in the Description column

A new browser window will open displaying the contract:

CONTRACT

State of Vermont
Buildings and General Services
Office of Purchasing & Contracting
109 State St
Montpelier VT 05609-3001
USA

Supplier 0000018606
Center for Technology Commercialization
134 Flanders Rd Ste 225
Westborough MA 01581
USA

Phone #:

Contract ID 00000000000000000000014580		Page 1 of 4
Contract Dates 02/02/2009 to 02/02/2010		**Origin** CPS
Description: CPS-EDSS		**Contract Maximum** $14,811.50
Buyer Name Smith,Steven D	**Buyer Phone** 828-4681	**Contract Status** Closed

Line #	Item ID	Item Desc	UOM	Unit Price	Max Qty	Max Amt
1		EDSS - ENVIRONMENTAL DESIGN FOR SAFETY & SECURITY	EA	14,811.50000	0.00	0.00

CONTRACTORS' RESPONSIBILITIES:

1). RESEARCH THE SPECIFIC NEEDS OF THE STATE OF VERMONT DEPARTMENT OF BUILDINGS AND GENERAL SERVICES, SECURITY DIVISION.

2). WORK WITH THE VERMONT DEPARTMENT OF HOMELAND SECURITY AND THEIR LIST OF CRITICAL INFRASTRUCTURE.

11. Click the **printer** icon in the tool bar to print the contract

Print/Dispatch a Contract is Complete

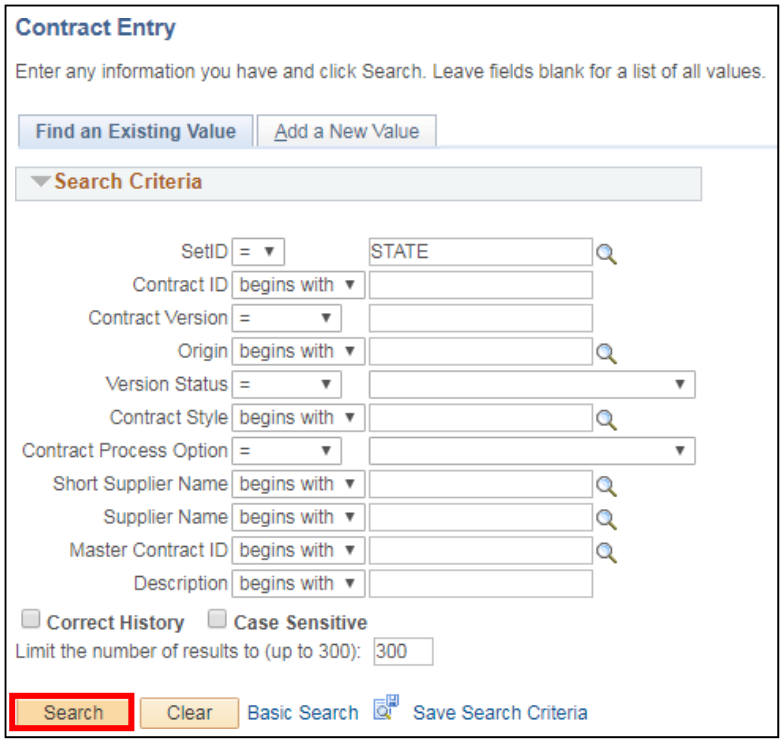
Close a Contract

Situations when this function is used: The contract period has expired, and all related purchase orders are in complete status. Follow specific controls in place in your department for closing contracts.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Contracts > Add/Update Contracts

Navigation Menu navigation: Procurement Contracts > Add/Update Contracts

The **Contract Entry** page displays, click on the **Find an Existing Value** tab:

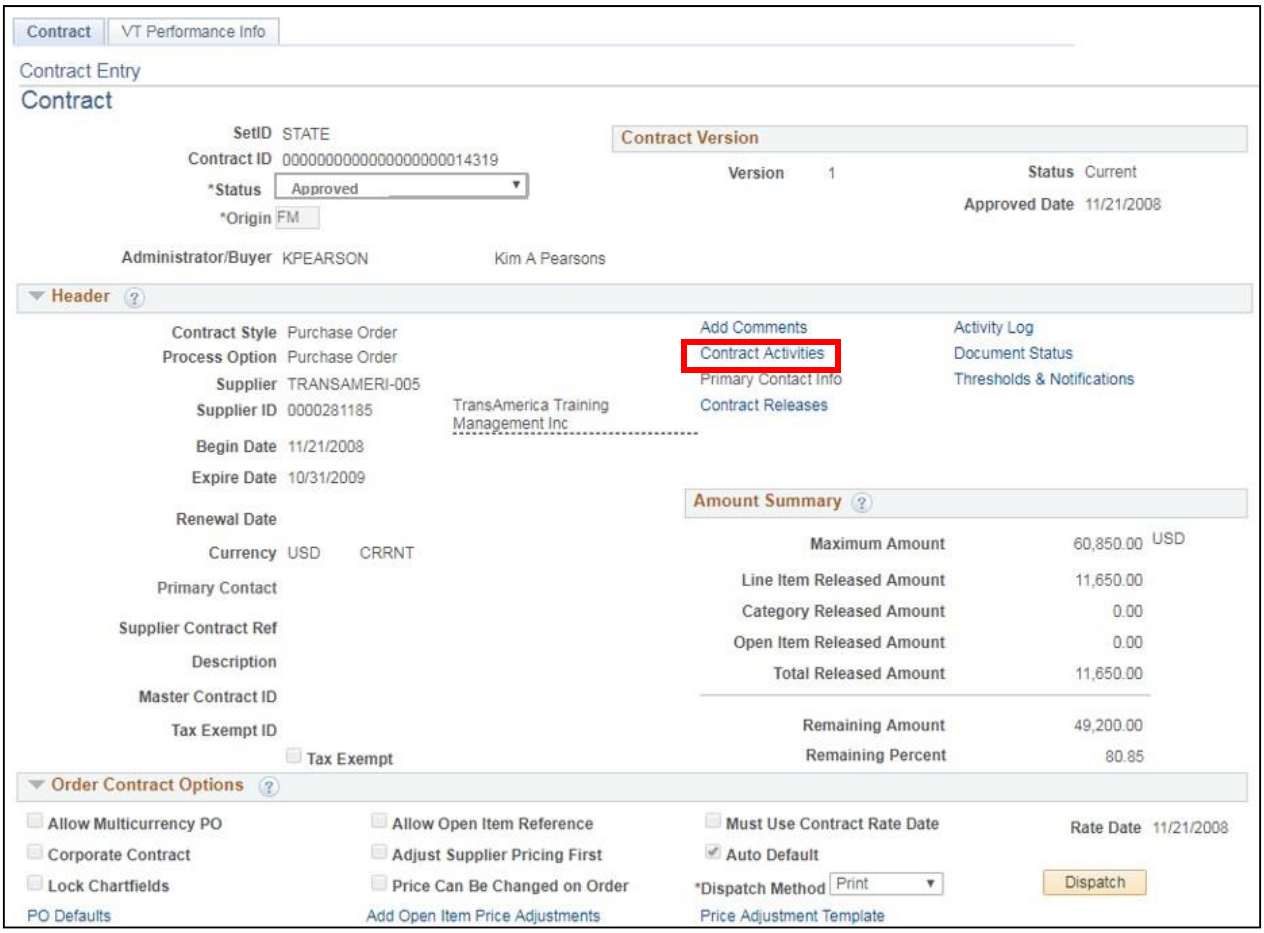


1. **Contract ID -** Enter the contract ID number
2. **Contract Process Option -** Should always be Purchase Order
3. **Origin -** Enter your depts. origin code
4. **Short Supplier Name -** Enter the short supplier name if known

   Note: You should <u>at least</u> enter your dept.'s origin code to keep the search results more manageable

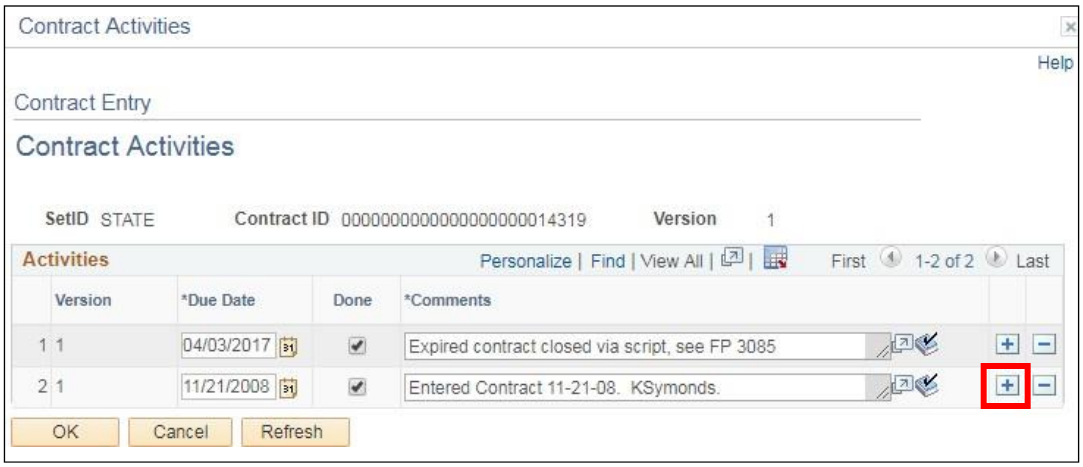
5. Click **Search**

The **Contract** page is displayed:



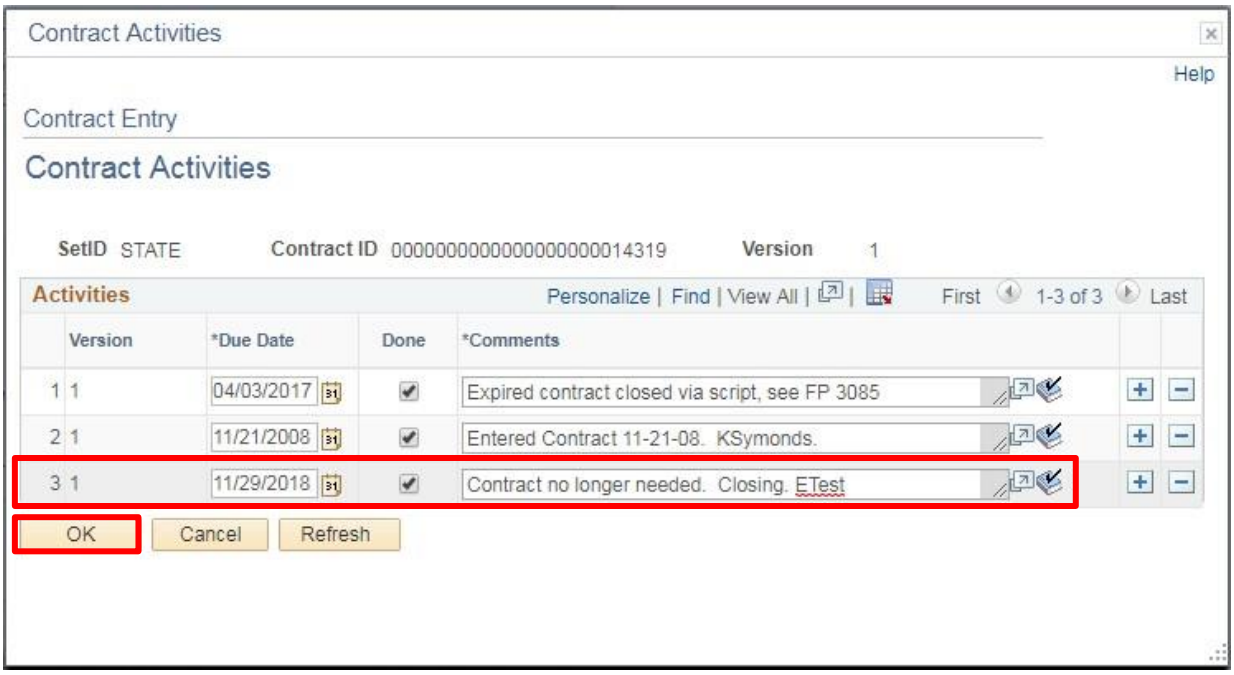
6. Click on the **Contract Activities** link

The **Contract Activities** page displays:



7. Click on **+** to add a comment line

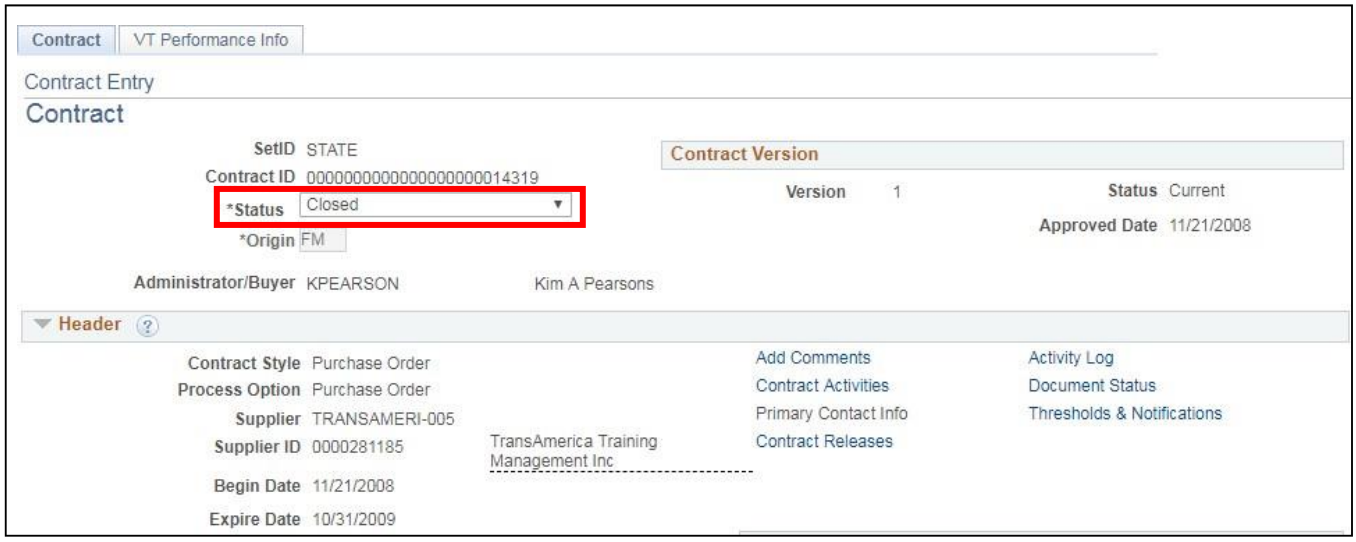
A new line opens:



8. Enter current date in **Due Date** and add a comment describing why the contract is being closed
9. Click **OK**

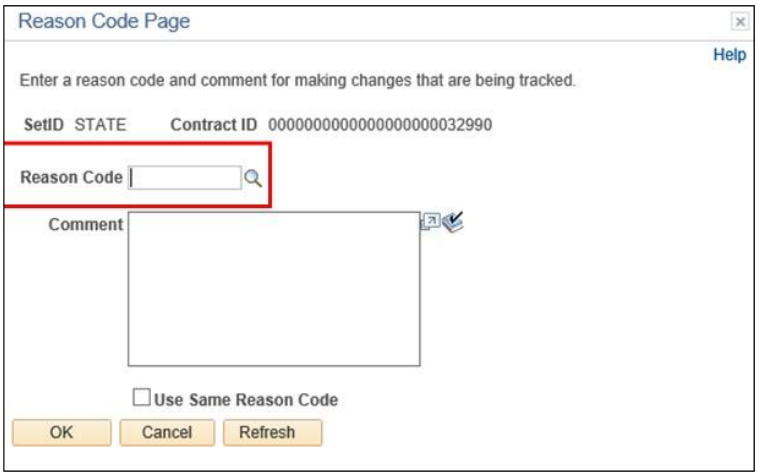
Special Note: The contract will not be available to close if any of the associated purchase orders are not in Completed status. To determine which purchase orders are not in Completed status, refer to the instructions for Contract Document Status Inquiry.

You are returned to the **Contract Entry** page:



10. Using the drop-down list, change the Status to **Closed**
11. At the bottom of the Contract Entry page, click **Save**

A **Reason Code** page will display prompting you to record a reason for the closure:



12. Select the appropriate **Reason Code** from the following values:

Reason Code	Description
CHANGE	Change Order
ERROR	Error
EXPIRE	Contract Expired
EXTENSION	Extension
RELERROR	Release Error
STATUS	STATUS

Once you have selected the Reason Code, default descriptive text will appear in the **Comment** box that you can update accordingly:

13. Click **OK** to return to the **Contract Entry** page

Close a Contract is Complete

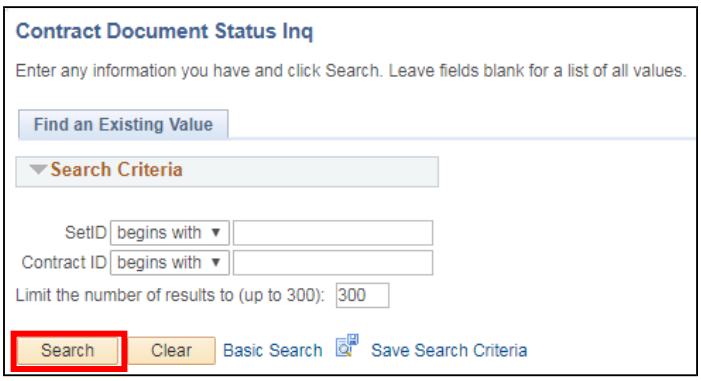
Contract Document Status Inquiry

Situations when this function is used: Determining what Purchase Orders have been entered against a Contract, the document date, what status the purchase orders are in, and the amount released against the Contract.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Contracts > Contract Document Status

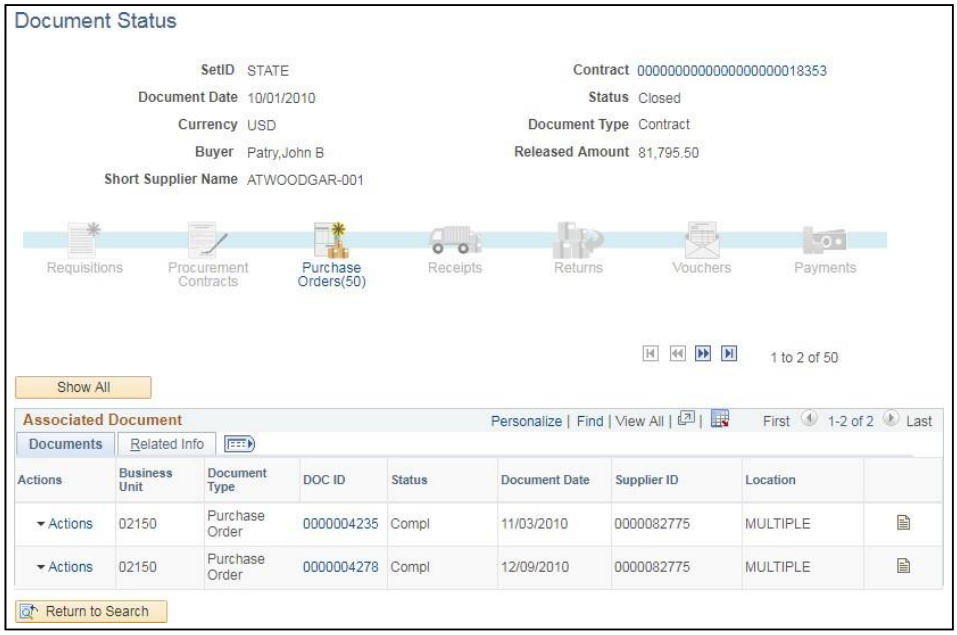
Navigator Menu navigation: Procurement Contracts > Add/Update Contracts

The **Contract Status Inquiry** page displays:



1. **SetID -** STATE
2. **Contract ID -** Enter contract ID # (be sure to include the leading zeros)
3. Click **Search**

The **Document Status** page displays:



4. Click on any active link to view additional information for those specific links

Contract Document Status Inquiry is Complete

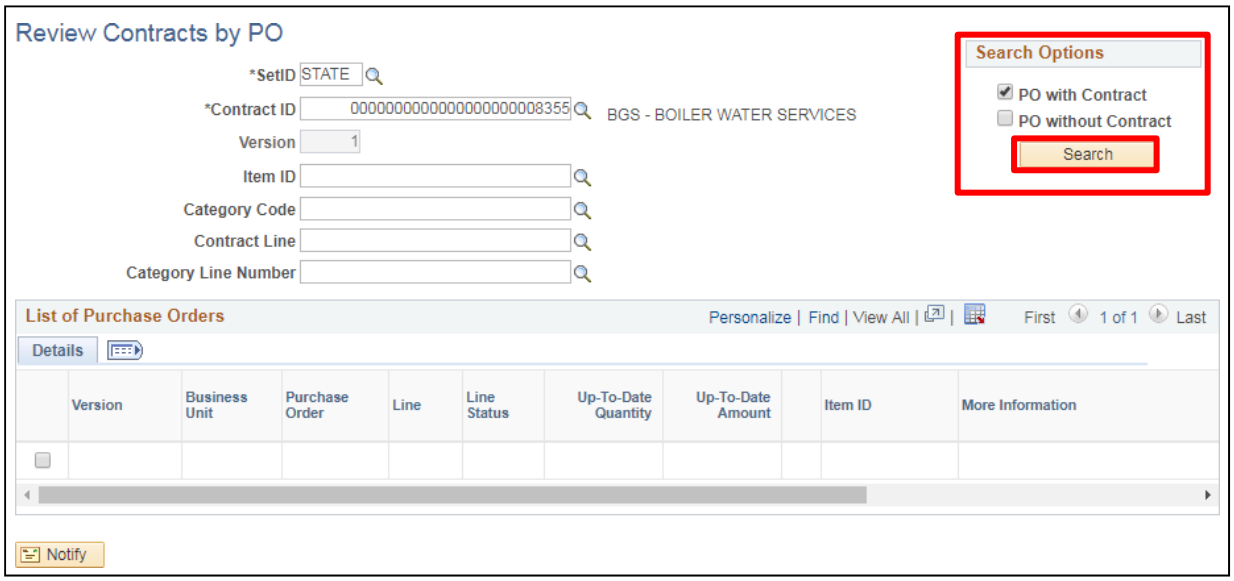
Inquire on Purchase Orders Against a Contract

Situations when this function is used: You need to know what Purchase Orders have been issued drawing down this contract.

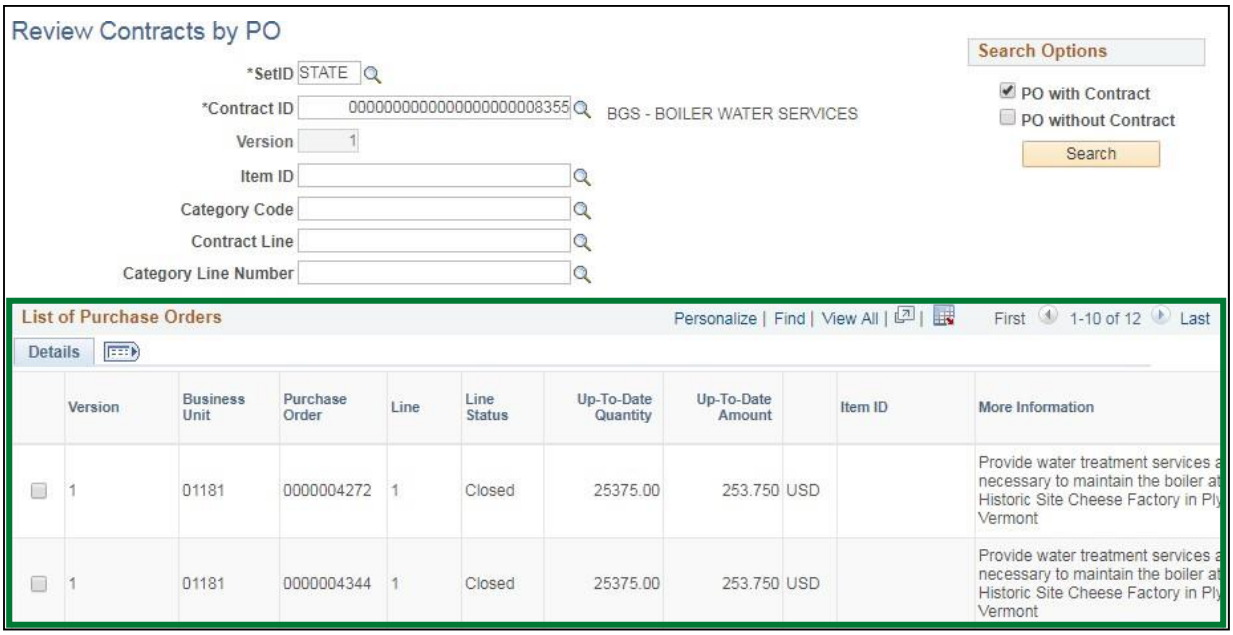
WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Contracts > Review Contract Purchase Orders

Navigator Menu navigation: Procurement Contracts > Review Contract Information > Review Contracts by PO

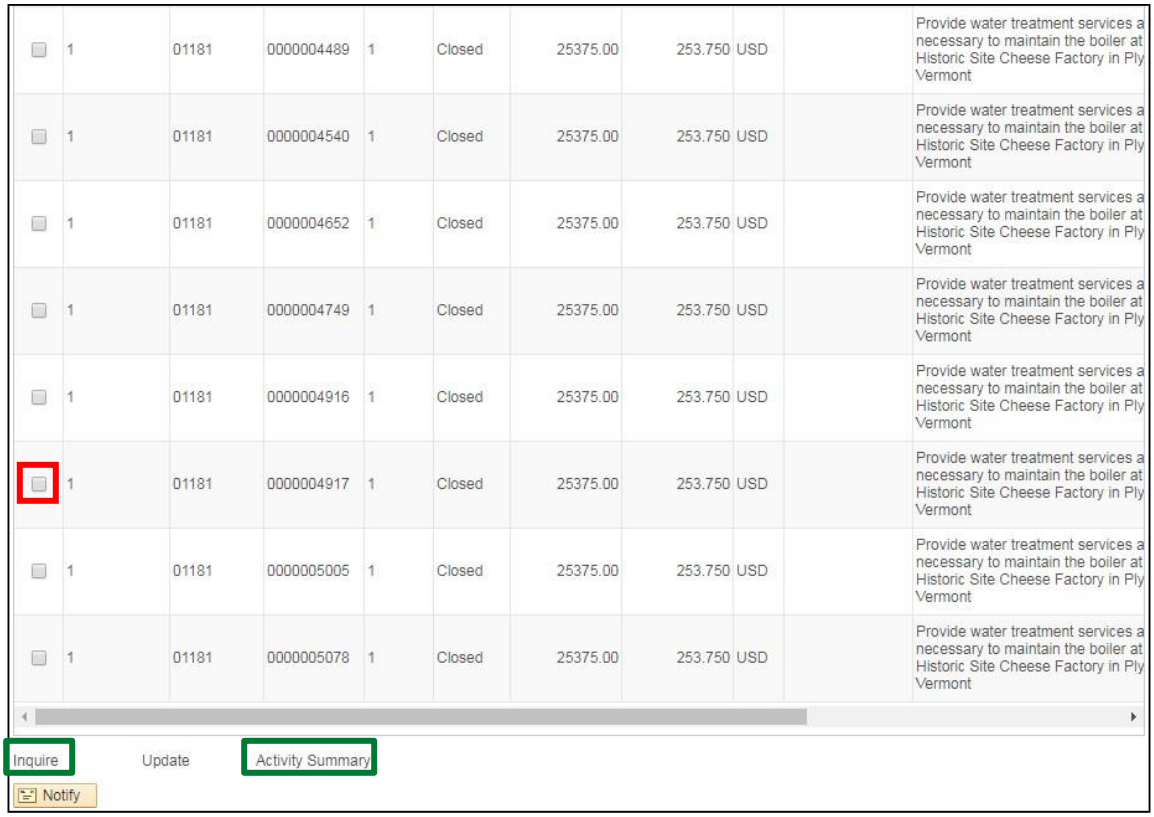
The **Review Contracts by PO** page displays:



1. Enter your **Contract ID** number (in this example use #8355 with the leading zeros), when you tab out of the field the check boxes in the upper right become active. Click the **PO with Contract** check box, once you click the check box the Search button becomes active
2. Click **Search** - search results appear beneath **List of Purchase Orders**



3. Scroll down the page



4. By selecting the **check box** next to a specific PO, the **Inquire** and **Activity Summary** links at the bottom of the page become active allowing you to drill back further for additional information.

Note: In this example the Update link is not active because the PO is in a Closed status. If the PO Status is Open, Approved or Dispatched, clicking on the Update link would open a new window displaying the Maintain Purchase Order page.

5. Clicking the **Inquire** link will open a new window displaying the Purchase Order Inquiry page:

Purchase Order Inquiry

Purchase Order

Business Unit 01181
PO ID 0000005005
PO Status Compl
Budget Status Valid

Header

PO Date 04/25/2006
Supplier Name JOHNSONDIV-001
Supplier ID 0000011256 Supplier Details
Buyer BWATSON
PO Reference BGS - BOILER WATER SERVICES

Header Details | Activity Summary
All RTV | Header Comments
Matching | Document Status
Actions

Doc Tol Status Valid
Backorder Status Not Backordered
Receipt Status Received
Hold From Further Processing

Amount Summary

Merchandise	253.75
Freight/Tax/Misc.	0.00
Total	253.75 USD
Encumbrance Balance	0.00 USD

Lines — Personalize | Find | View All | First 1 of 1 Last

Line		Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount		Status		
1			Provide water treatment servic	00101	25375.0000	EA	253.75	USD	Closed		

Return to Search | Notify | Related Links

6. Clicking on the **Activity Summary** link will open a new window displaying the **Activity Summary** page

Activity Summary

Business Unit 01181
Purchase Order 0000005005
PO Status Compl
Supplier JohnsonDiversey Inc
Supplier Location MULTIPLE

Merchandise Amount	253.75 USD
Merchandise Receipt	0.00 USD
Merchandise Returned	0.00 USD
Merchandise Invoice	253.75 USD
Merchandise Matched	253.75 USD

Lines — Personalize | Find | View All | First 1 of 1 Last

Details | Receipt | Invoice | Matched | RTV

Line		Item	Item Description	UOM	Manufacturer ID	Mfg Itm ID
1			Provide water treatment servic	EA		

Return to Search | Notify

Inquiring on Purchase Orders against a Contract is Complete

Contracts by Origin Code Report

Situations when this function is used: A report of all Approved, Open, or Closed contracts for your department.

WorkCenter navigation: Purchasing WorkCenter > Reports/Processes pagelet > Procurement Contracts > VT Contracts by Origin

Navigator Menu navigation: Procurement Contracts > Reports > VT Contracts by Origin

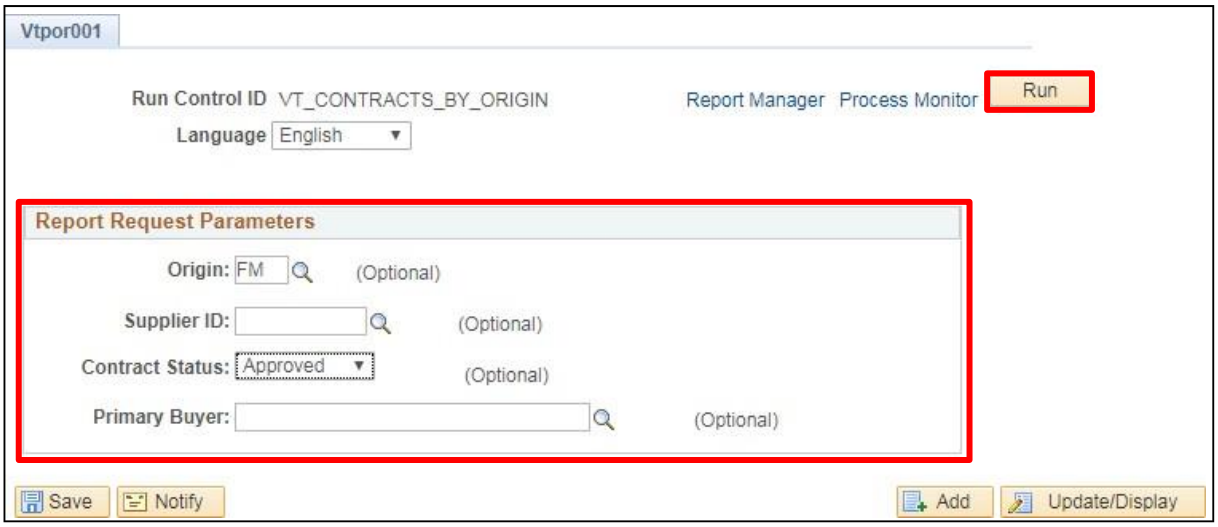
The **VT Contracts by Origin** page displays, click on the **Add a New Value** tab:

1. **Run Control ID** - Enter a run control ID. If you already have a Run Control ID click the **Find an Existing Value** tab, enter the Run Control ID or a portion of it and click **Search**

> ***Run Controls are operator specific – it is important to remember you should not cross modules with your run controls – doing so may cause the run control to become corrupt.***

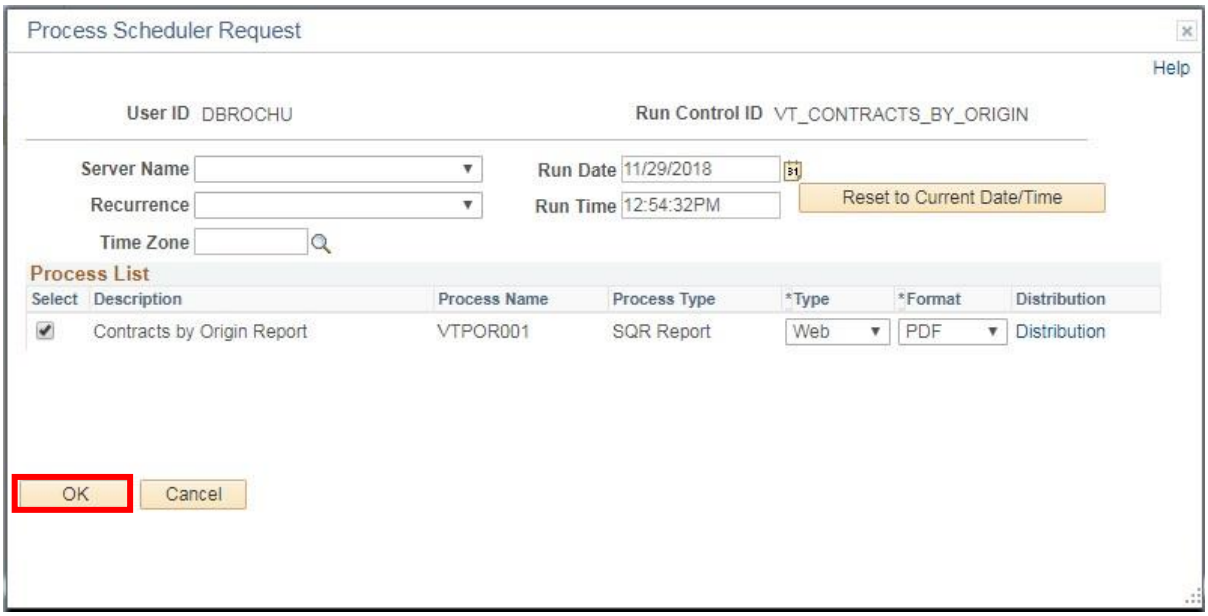
2. Click **Add**

The **Run Control** page displays:



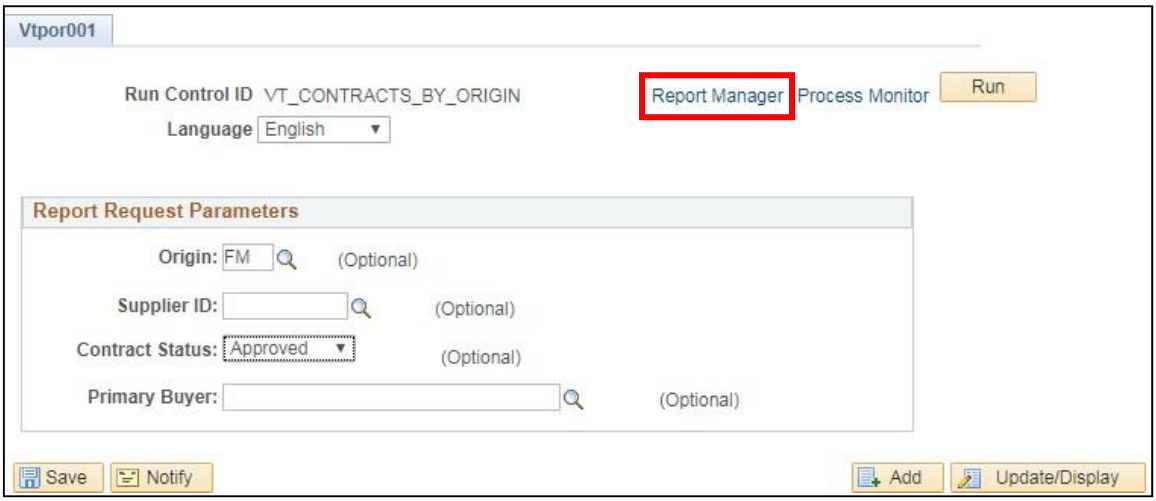
3. **Origin Code -** Enter your dept origin code or, enter CP or CPS to view Central Purchasing Contracts
4. **Supplier ID -** Enter a supplier ID if you are searching for a specific supplier contract
5. **Contract Status -** Choose a value from the drop-down menu to help keep the report size manageable
6. **Primary Buyer -** Enter a primary buyer if you want to view contracts for a specific Primary Buyer
7. Click **Run**

The **Process Scheduler Request** window opens:



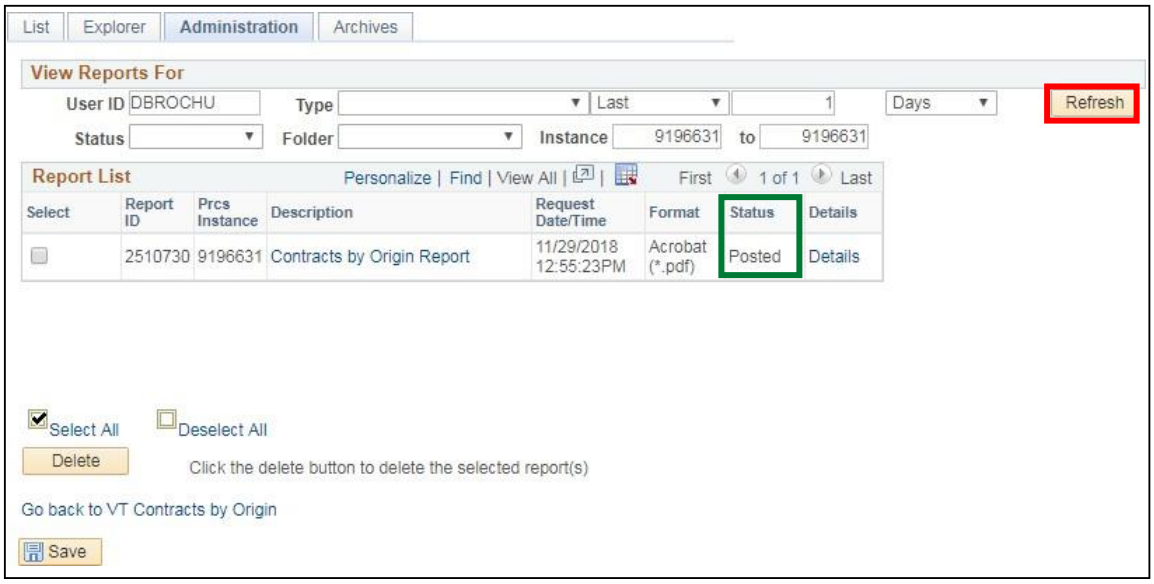
8. Click **OK**

You are brought back to the **Run Control** page:



9. Click the **Report Manager** link

The **Report Manager** page displays, click on the **Administration** tab:



10. Click **Refresh** until the Status = **Posted**

11. Click the **Contracts by Origin Report** link in the Description column

A new browser window will open displaying the report:

State of Vermont

Report ID: VTPOR001.SQR — List of Contracts by Origin Code (Departments) — Date: 29-NOV-2018 12:55:38.000000_PM

Origin: FM Finance & Management

Contract Id	Contract Description	Vendor Id	Vendor Name	Contract Status	Buyer Id	Contract Begin Date	Contract Expire Date	Contract Max Amount	Amt Relsd on Contract
000020987	Tech Support for	0000012725	CGI Technolog	Approv	CTOUCHET	11/09/11	01/13/22	3,499,646.00	3,129,269.00
000034219	Consulting - VISI	0000362548	Sierra-Cedar,	Approv	CTOUCHET	06/26/17	04/30/19	4,959,293.00	1,146,682.00
000036267	PO-101	0000362548	Sierra-Cedar,	Approv	KSYMONDS	01/01/18	09/03/18	1,000.00	0.00
000036271	cpntact for po-25	0000084643	CherryRoad Te	Approv	KSYMONDS	08/25/18	08/25/19	25,000.00	2,400.00

Records Printed: 4

VTPOR001.SQR Contracts by Origin Code Report Run Sucessfully

12. You can print this report using the printer icon in the tool bar

VT Contracts by Origin Report is Complete

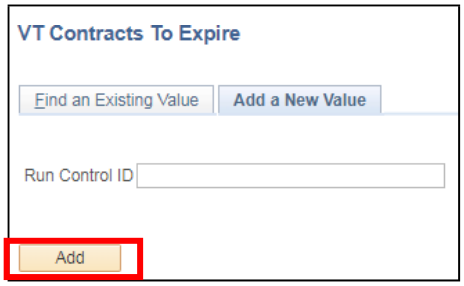
Contract Expiration Report

Situations when this function is used: Periodically the Contract Expiration Report should be run as part of managing your department contracts. The report will show what contracts have expired or are due to expire by the date you enter.

WorkCenter navigation: Purchasing WorkCenter > Reports/Processes pagelet > Procurement Contracts > Vt Contracts to Expire

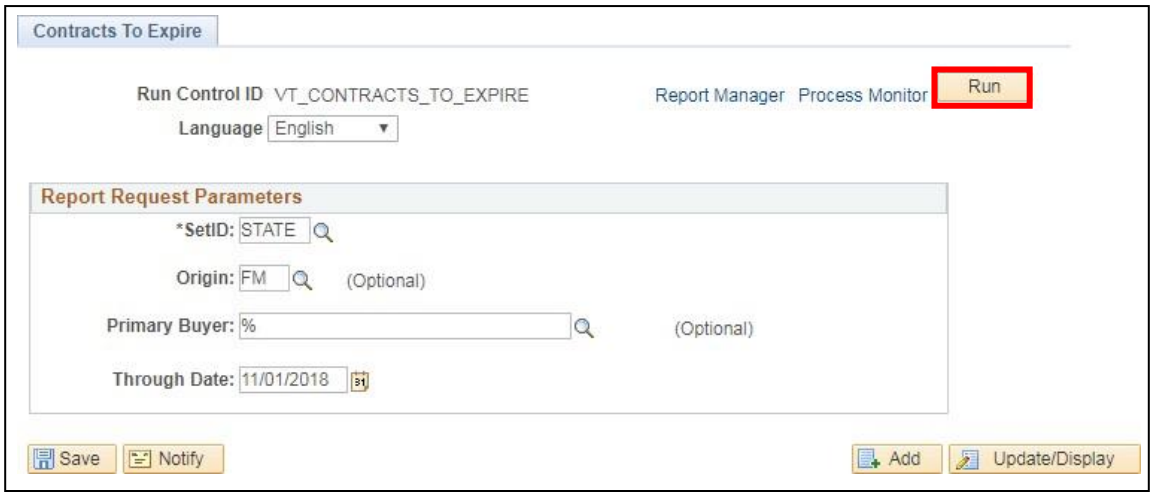
Navigator Menu navigation: Procurement Contracts > Reports > VT Contracts to Expire

The VT Contracts to Expire page displays, click on the **Add a New Value** tab:



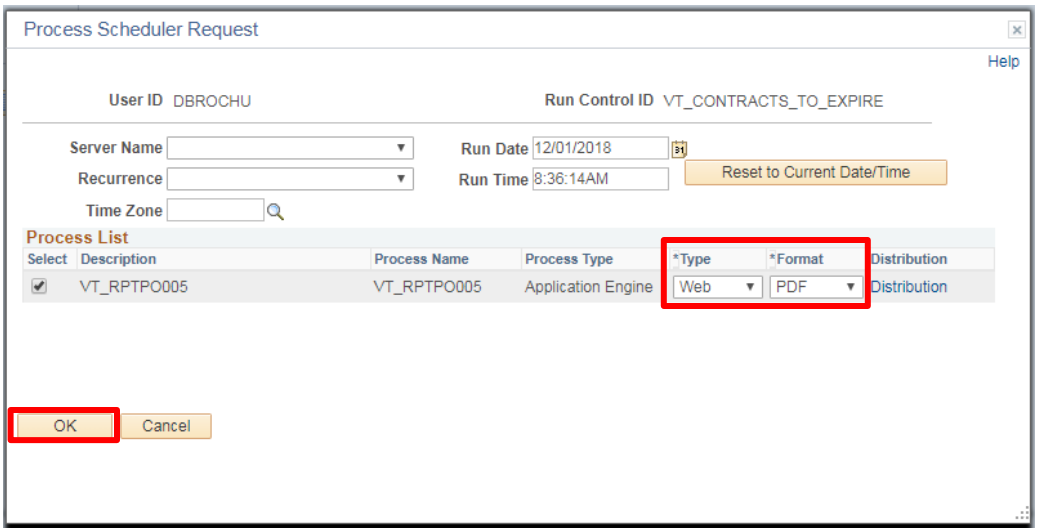
1. **Run Control ID -** Enter a Run Control ID
2. Click **Add**

The **Contracts To Expire** page displays:



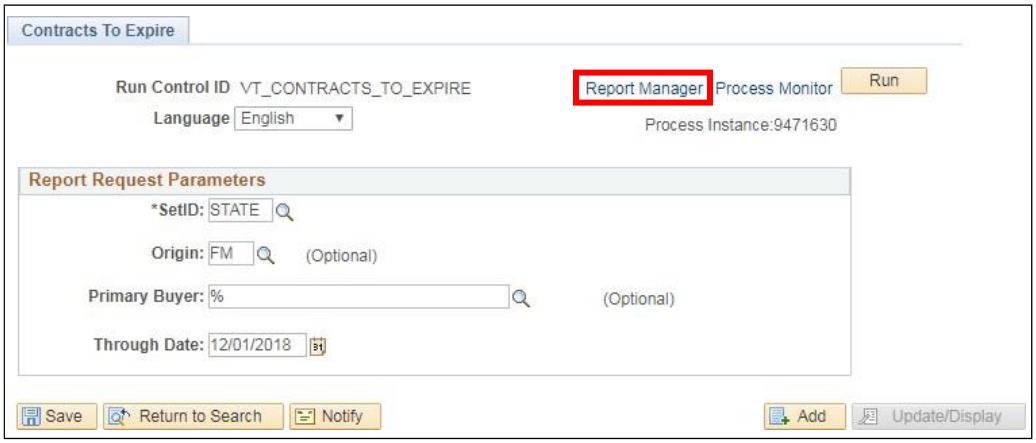
3. **SetID** - STATE, do not change the default
4. **Origin Code -** This report should always be run using your department Origin code *(example: FM, DPS, FPR, etc. Running this report using your origin code will help keep the report size manageable)*
5. **Primary Buyer** - Enter if you have this information, keep in mind if you enter a primary buyer the report results will be only for that primary buyer and not for all buyers. Entering a % will return data for all buyers
6. **Through Date -** Example: 11/01/2018, this will also help keep the results manageable
7. Click **Run**

The **Process Scheduler** page displays:



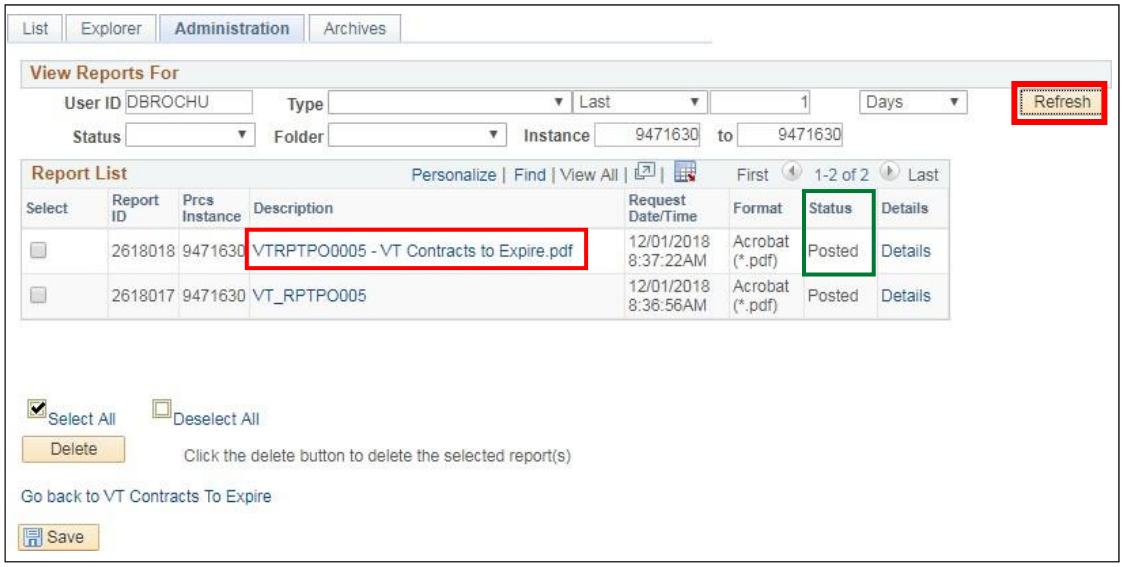
8. Ensure the ***Type = Web** and the ***Format = PDF**
9. Click **OK**

You are brought back to the **Run Control** page:



10. Click on the **Report Manager** link

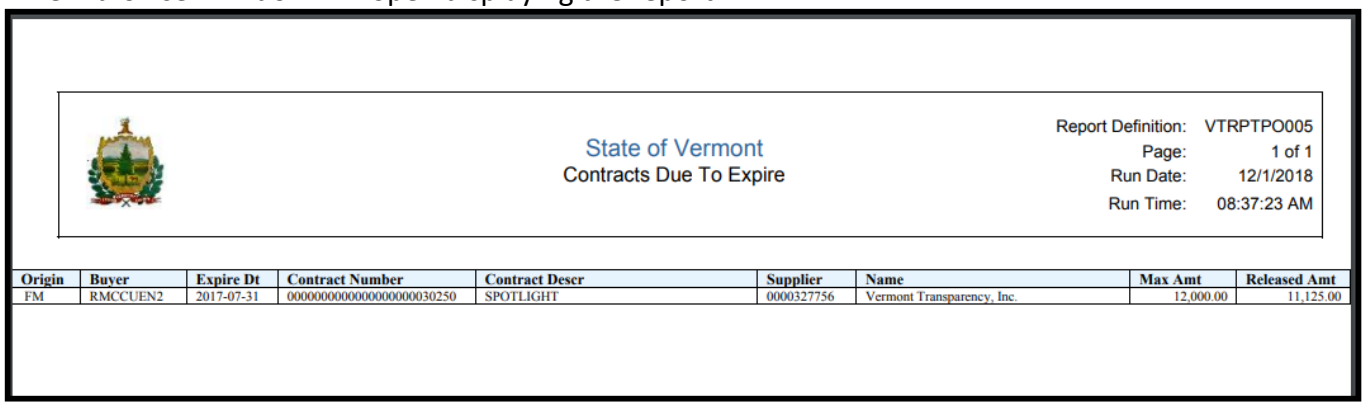
The **Report Manager** page displays, click on the **Administration** tab:



11. Click the **Refresh** button until the **Status = Posted**

12. Click on the **VT Contracts to Expire Report.pdf** link in the Description column

A new browser window will open displaying the report:



State of Vermont
Contracts Due To Expire

Report Definition: VTRPTPO005
Page: 1 of 1
Run Date: 12/1/2018
Run Time: 08:37:23 AM

Origin	Buyer	Expire Dt	Contract Number	Contract Descr	Supplier	Name	Max Amt	Released Amt
FM	RMCCUEN2	2017-07-31	00000000000000000000030250	SPOTLIGHT	0000327756	Vermont Transparency, Inc.	12,000.00	11,125.00

13. You can print this report using the printer icon in the tool bar.

Contracts to Expire Report is Complete

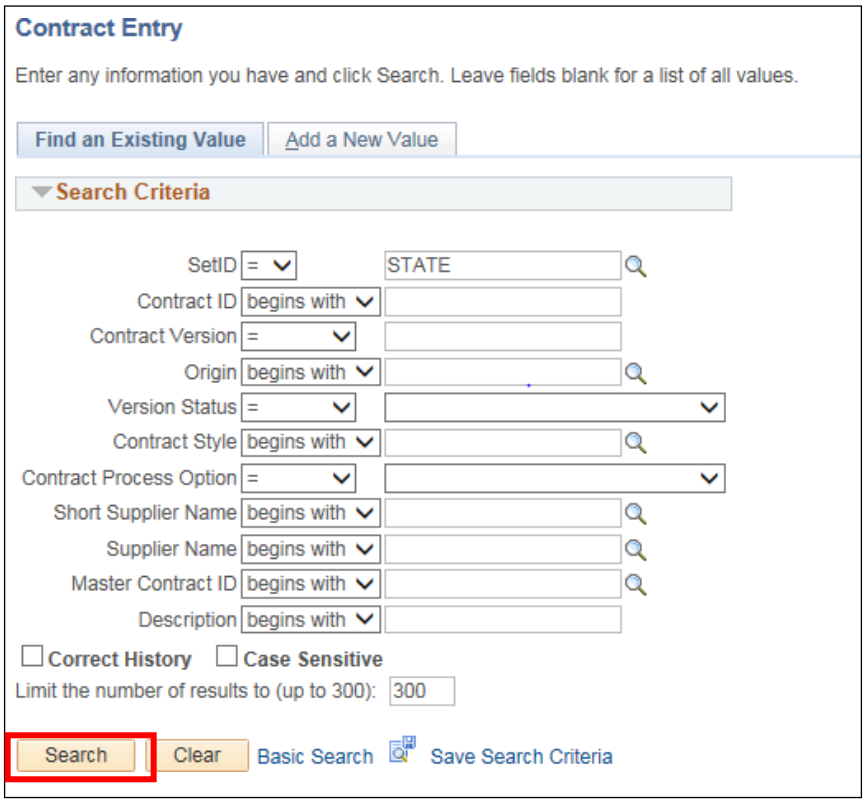
Review Contract Change History

Possible situations when this function is used: Auditing and tracking of changes to contracts require the need to review changes made to a Contract. VISION Contract change tracking provides an audit trail of key contract transactional information that identifies who made what change and when the change was made.

WorkCenter navigation: Purchasing WorkCenter > Links pagelet > Contracts > Add/Update Contracts

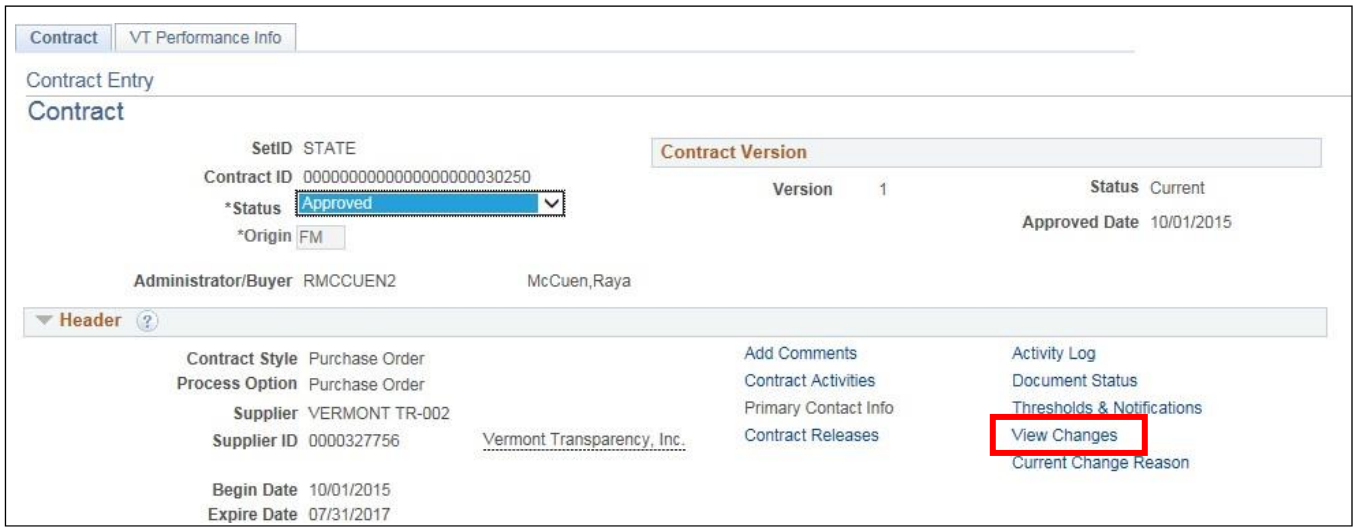
Navigator Menu navigation: Procurement Contracts > Add/Update Contracts

The **Contract Entry** page displays, click on the **Find an Existing Value** tab



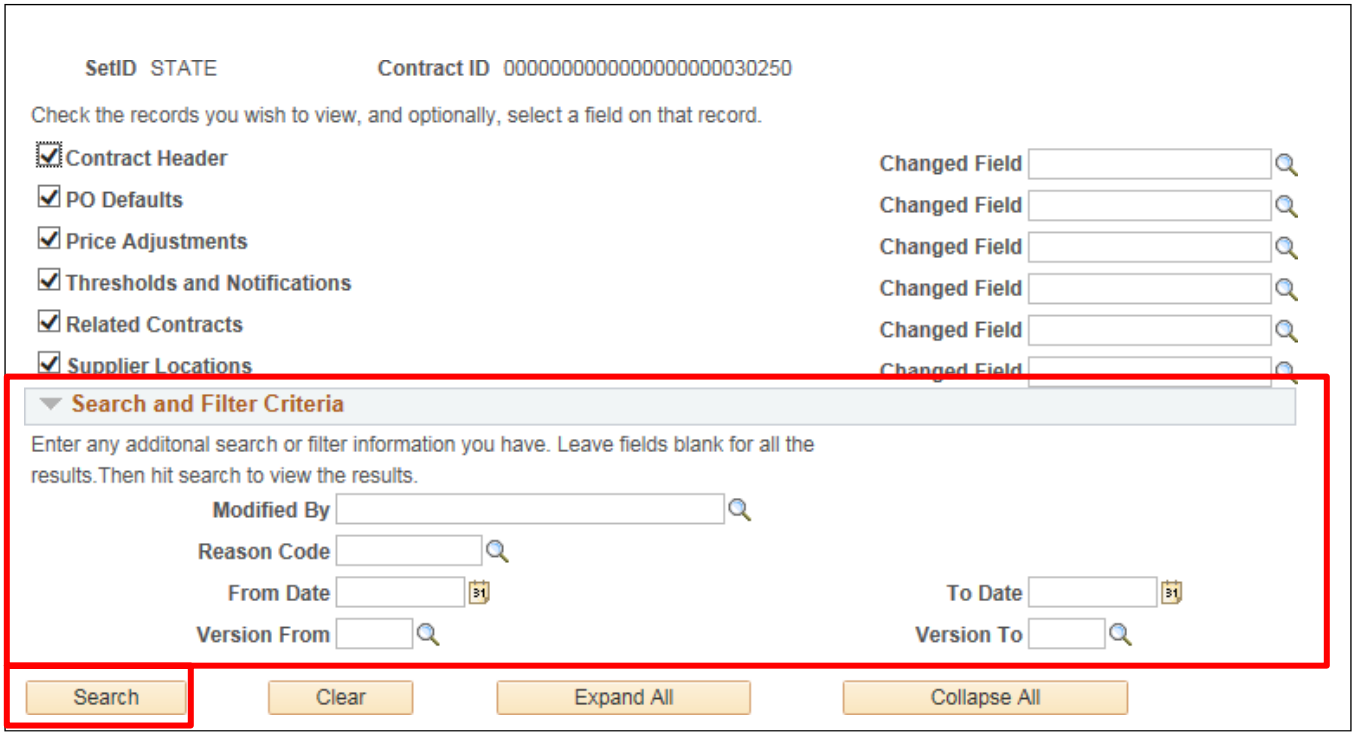
1. **Contract ID -** Enter a Contract ID number
2. **Contract Process Option -** Should always be Purchase Order)
3. **Origin** - Your depts. origin code - **You should at least enter your dept.'s origin code to keep the search results more manageable**
4. **Short Supplier Name -** Enter Short Supplier name if known
5. Click **Search**

The **Contract Entry** page displays:



6. Click the **View Changes** link

The **Contract Change History** page displays in a new window:



7. You can refine search criteria by populating fields in the Search and Filter Criteria section. Examples of search criteria you may want to refine include Modified By, and From/To Dates

8. Click **Search**

The search results populate:

Contract Header — Personalize | Find | View All | First 1-10 of 21 Last

Version	Sequence	Change Type	Description	Value	Modified By	Last Changed	Reason
1	1	Change	Change Order Source	ONL	JKENNERK	10/01/18 9:50:10AM	CHANGE
1	1	Change	Notify Days Before Expires	30	JKENNERK	10/01/18 9:50:10AM	CHANGE
1	1	Change	Amount Less than Maximum	1000	JKENNERK	10/01/18 9:50:10AM	CHANGE
1	0	Original	Maximum Amount	12000	JKENNERK	10/01/18 8:54:08AM	CHANGE
1	0	Original	Buyer	RMCCUEN2	JKENNERK	10/01/18 8:54:08AM	CHANGE
1	0	Original	Change Order Source	ONL	JKENNERK	10/01/18 8:54:08AM	CHANGE
1	0	Original	Contract Beginning Date	10/01/2015	JKENNERK	10/01/18 8:54:08AM	CHANGE
1	0	Original	Corporate Contract	Y	JKENNERK	10/01/18 8:54:08AM	CHANGE
1	0	Original	Expire Date	07/31/2017	JKENNERK	10/01/18 8:54:08AM	CHANGE
1	0	Original	Send Date/Amount Notification	Y	JKENNERK	10/01/18 8:54:08AM	CHANGE

Note - You can repeat these steps for each of the tabs on the Contract Change History page.

Review Contract Change History is Complete

Reports & Queries

Reports and Queries for Contracts can be found in the **Contracts Reporting Manual**.