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# Training Guide

**Course Code: SCM 205**

**Course: Departmental Supplier Contract  
Management**

**Version 2.0**

## Course Overview

**Course Description** This course provides a comprehensive review of the Departmental Supplier Contract Management processes.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: Group Multi Supplier Contracts
- Module 3: Supplier Contracts
- Module 4: Course Summary

**Training Audiences** The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related system access:

- GMS Approver
- Central Contract Admin (PCO)
- Central GRI
- Departmental Contract Administrator
- Constitutional Office Contract Administrator
- Constitutional Office Contract Manager
- Constitutional Office GMS Approver

**Prerequisites** Participants are required to complete the following end-user Training courses prior to starting this course:

- ERP 101 – Overview of INFORMS
- ERP 102 – INFORMS Navigation, Reporting, and Online Help
- SCM 101 – Supply Chain Management Fundamentals

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## Module 1: Course Introduction

### Topics

#### **This module covers the following topics:**

- Learning Objectives
- Roles and Responsibilities
- Navigation
- Purpose and Benefits to the Business Process
- The End-to-End Business Process

## Module 1: Course Introduction

### Learning Objectives

At the conclusion of this course, participants will have:

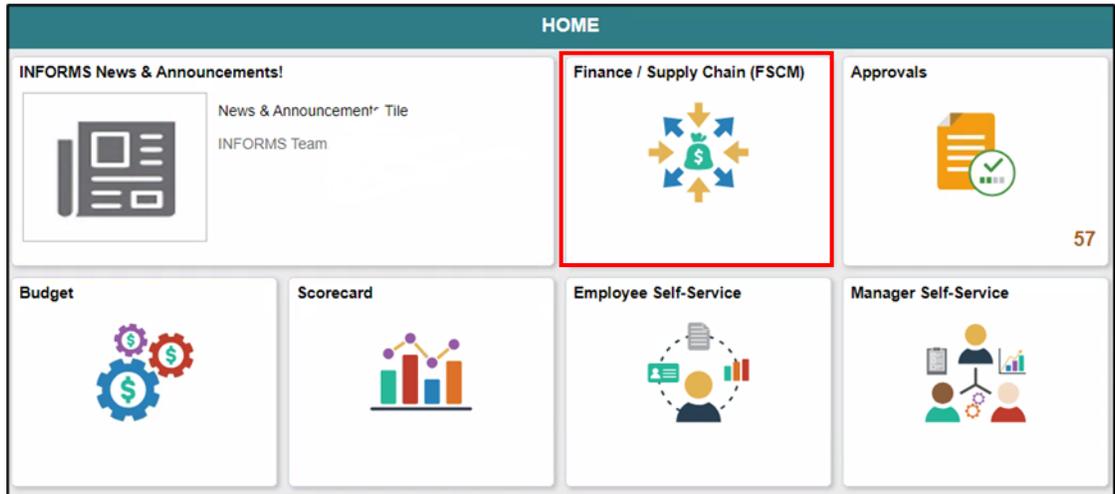
- Better understanding of the End-to-End Process for Departmental Supplier Contract Management
- Completed overview of Group Multi Supplier Contracts
- Set up Purchase Order Contracts
- Related PO contract to allocation
- Managed Contract Deliverables
- Set up Contract Releases

## Module 1: Course Introduction

### Navigation

Below are the steps to navigate to the Supplier Contract Collection, which will be used for navigation in the rest of this course:

1. Login to INFORMS and select the **Finance/ Supply Chain (FSCM)** Tile from the home landing page below.



2. Select **Supply Chain Operations**.



3. Select **Supplier Contracts Center**.



## Module 1: Course Introduction

### Training Audience:

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

### Roles and Responsibilities

- **GMS Approver:** The GMS Approver has the ability to review and update the Group Multi Supplier Contract status to Approved, Canceled, Closed, on-hold and Open.
- **Central Contract Admin (PCO):** The Central Contract Admin has the ability to create and manage the Group Multi Supplier Contract and related Allocation and Contract data.
- **Central GRI:** The Central GRI will assign and modify Grant Restriction Indicator (GRI) value on a Group Multi Supplier Contract.
- **Departmental Contract Administrator:** The Department Contract Admin has the ability to create and manage a Supplier Contract.
- **Constitutional Office Contract Administrator:** This is a Creator role. It allows a user to create and revise parent and child contracts under the contract style of the respective Constitutional Office. The CO Contract Admin can also upload documents into the Supplier Contract module.
- **Constitutional Office Contract Manager:** Also known as Procurement Manager. This is an Approver role. It allows a user to review and approve the PO contract style (Child Contracts) issued under the respective Constitutional Office Contract style. This role can change the Contract Entry status field drop-down menu to approved, canceled, closed, on hold, and open.
- **Constitutional Office GMS Approver:** This is an Approver role. It allows a user to approve the respective Constitutional Office GMS (group multi-supplier) – Parent Contracts. This role can change the Contract entry status field drop-down menu for CO parent contracts to approved, canceled, closed, on hold, and open.

## Module 1: Course Introduction

### Purpose and Benefits to the Business Process

The INFORMS Supply Chain Management (SCM) provides the ability to manage the lifecycle of procurement of goods and services contracts. The modules provide the functionality to request, solicit, contract, procure, receive, and pay for goods and services.

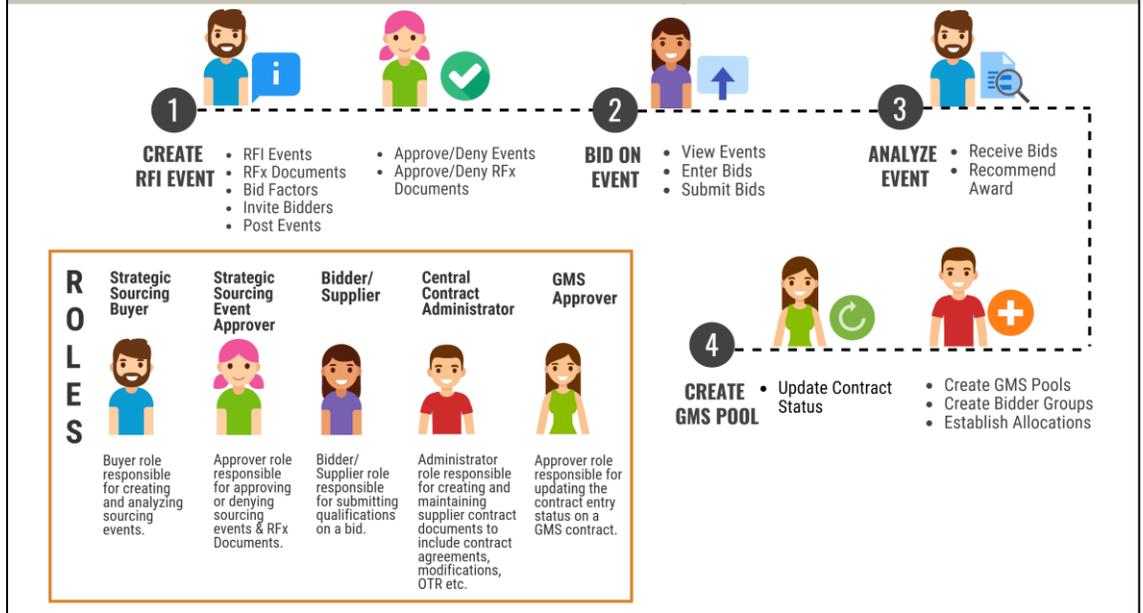
## Module 1: Course Introduction

### The End-to-End Business Process

#### MIAMI-DADE COUNTY

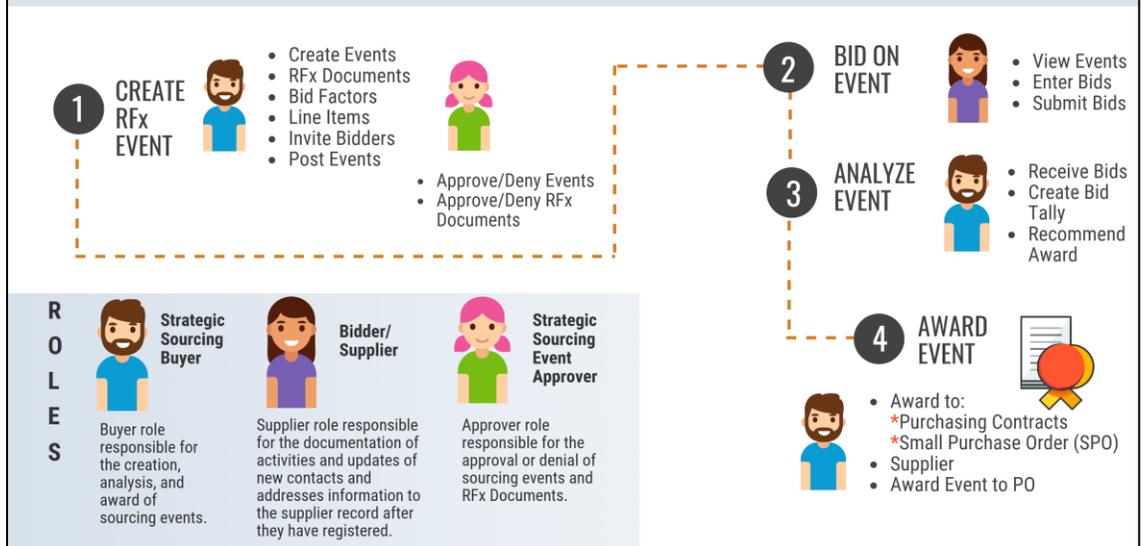
### SOURCE TO CONTRACT (RFI) Business Process

This Source to Contract process covers the creation and analysis of a Request for Information (RFI) sourcing event and the creation of the Group Multi Supplier (GMS) Pool.



### DEPARTMENTAL SOURCE TO CONTRACT (RFx) Business Process

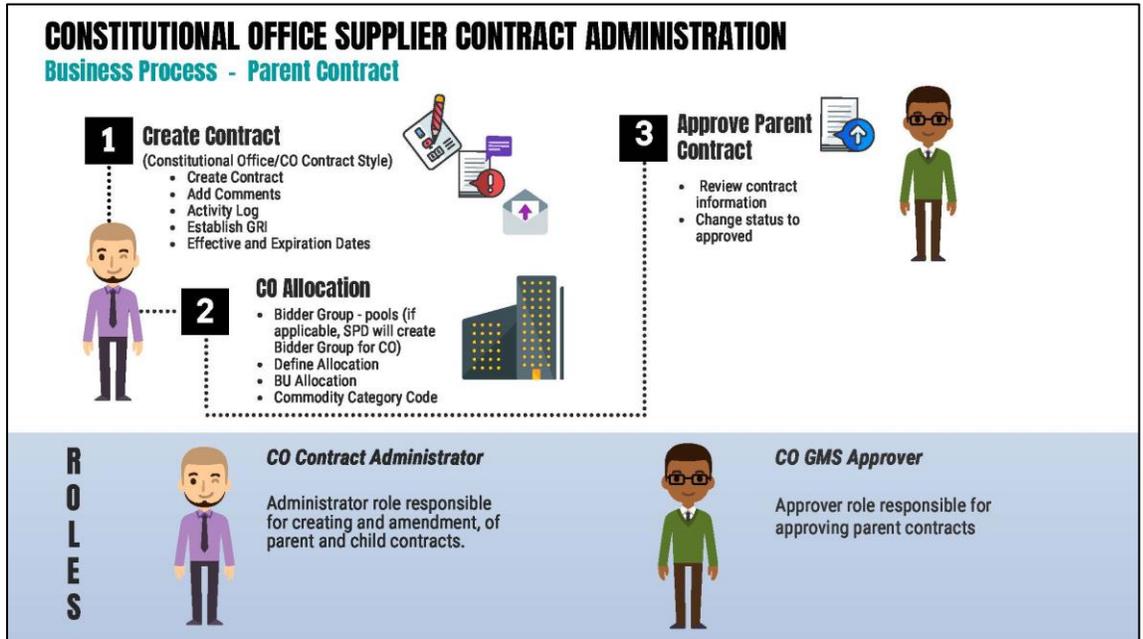
This Source to Contract process covers the creation, analysis, and awarding of an RFx sourcing event and the creation of the Purchasing Contract.



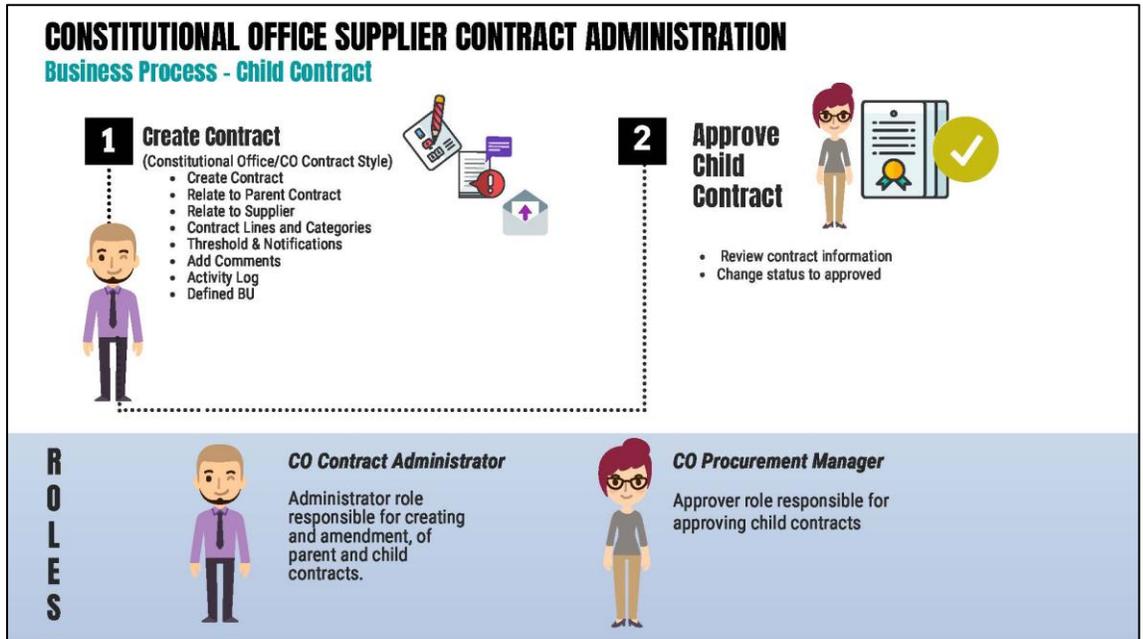
The End-to-End Business Process

Module 1: Course Introduction

CONSTITUTIONAL OFFICE – Creation of Parent Contract



CONSTITUTIONAL OFFICE – Creating a child contract when the award does not come from a sourcing event



## Module 1: Course Introduction

**Module 1:** This module covers the following topics:

**Course  
Introduction  
Summary**

- Learning Objectives
- Roles and Responsibilities
- Navigation
- Purpose and Benefits to the Business Process
- End-to-End Business Process

The following key concepts were covered in this module:

- Group Multi Supplier Contract (a.k.a. Parent Contracts)
- PO Contracts (a.k.a. Child contracts)
- End-to-End Business Process for Document Management (**Functionality is available, but not in use by MDADE**)

## Module 2: Group Multi Supplier Contract

**Lesson** This module includes the following lesson:

- Overview**
- Overview of Group Multi Supplier Contracts

## Lesson 1: Overview of Group Multi Supplier Contracts

**Lesson 1:** At the conclusion of this lesson, users will be able to:

### Introduction

- Understand the Basics of the Group Multi Supplier Contract
- Enter Supplier Contract Group Multi Supplier (Parent Contracts)
- Approve Group Multi Supplier (Parent Contracts)

## Lesson 1: Overview of Group Multi Supplier Contracts

### Lecture 1: Overview of Group Multi Supplier Contracts

The Group Contract feature enables users to link multiple standards, manufacturers, or special-purpose contracts to an overall parent or group contract for viewing and reporting purposes. These contracts are called Group Multi Supplier contracts.

Group Multi Supplier contracts allow users to view consolidated spend information across linked child contracts. When linking the child contracts to a Group Multi Supplier contract, the child contracts can be for different suppliers.

The Group Multi Supplier Contract works with supplier contract documents, agreements, and workflow notifications like other Supplier Contracts. The Process Option and the contract style are used to distinguish the Group contracts and Special Purpose contracts from other types of Supplier Contracts. In addition, some links are controlled by the contract style. Group Multi Supplier Contract is a header level contract that does not allow for voucher or purchase order processing. Users cannot associate or link a Group Multi Supplier contract number to a Purchase Order or Voucher. Instead, the Child Contract is linked or associated to a Purchase Order or Voucher.

**Note:** Constitutional Offices’ Parent Contract styles have all been set up as Group Multi Supplier Contract. Below is the listing of Contract Styles for the Constitutional Offices

Contract Process Option	Contract Style	Style ID	Business Unit(s)
Group Multi Supplier Contract	Clerk Of Courts	CL	CL and FN
Group Multi Supplier Contract	Police	PD	PD
Group Multi Supplier Contract	Elections	EL	EL
Group Multi Supplier Contract	Tax Collector	TC	TC
Group Multi Supplier Contract	Property Appraiser	PA	PA

## Lesson 1: Overview of Group Multi Supplier Contracts

### Lecture 1: Overview of Group Multi Supplier Contracts

Create a Group Multi Supplier Contract

The Group Multi Supplier Contract groups together related child contracts. All child contracts can have different suppliers. Since releases are not allowed against the Group Multi Supplier contracts, a Purchase Order or Voucher can only be associated with child contracts.

Navigate to the Contract Entry search page: **Finance/ Supply Chain > Supply Chain Operations > Supplier Contracts Center > Contract Entry**

**Contract Entry**

**Contract**

Sell ID: MDC

Contract ID: GS-07F-0638M-2

Contract Style: Accessed Contracts

Process Option: Group Multi Supplier

\*Status: Approved

Description: LAW ENFORCEMENT AND SECURITY E

Administrator/Buyer: BANDHUJ Bandhu, Janice

Begin Date: 05/11/2016

Expire Date: 09/22/2022

Approved Date: 05/21/2020

Renewal Date:

Currency: USD

Rate Type: CRRNT

[Add a Document](#)

Version: 1

Status: Current

[New Version](#)

- [Contract Header Agreement](#)
- [Thresholds & Notifications](#)
- [Add Comments](#)
- [Activity Log](#)
- [Group Contract Summary](#)
- [MDC Allocations](#)
- [Custom Fields](#)

---

**Related Contracts**

Add Related Contract Total Released Amount: 0.00 USD

**Related Contracts**

Contract ID	Relationship Status	Begin Date	Contract Style	Supplier	Total Released Amount	Currency	Document	Amendment	View Contra
1 000000782	Active	05/11/2016	Purchase Order	REMOTEC INC	0.00	USD			

## Lesson 1: Overview of Group Multi Supplier Contracts

### Lecture 2: Enter Supplier Contract Group Multi Supplier (Parent Contracts)

The INFORMS Supplier Contract Entry Page for Parent Contracts (Group Multi Supplier) is comprised of four main sections:

Contract Details, Contract Header, Contract Allocation, GRI, Bidder Group and Contract Categories.

- To create a Supplier Contract, navigate to: **Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contracts Center**
- Select the **Contract Entry** from the **Create Contracts and Documents** menu.
- Select the **Add a New Value** tab, **Style ID**, and **Contract Process Option**.
- **Note:** SetID defaults to MDC and Contract ID defaults to NEXT. Leave the Contract ID set as next to allow the system to auto number the contract ID. These values should not be changed. The only SetID value is MDC and the Contract ID should be auto generated by keeping NEXT in the Contract ID field.

#### Contract ID Naming Conventions and Scenarios for Constitutional Offices

- **Parent Contract (Group Multi-Supplier):** The Parent Contract number should match the Event ID for sourcing events that are fully awarded through the sourcing module. This applies when the sourcing event results in a purchase order contract style (BUY).
- **RFI Sourcing Events:** For RFI sourcing events that lead to negotiated and executed contracts, the Parent Contract number must match the legal executed document.
- **CO Accessing MDADE Contracts:** When a CO accesses an MDADE contract, the contract must be prefixed with the CO's Business Unit (BU). For example, if the MDADE contract is RFP-00200, the corresponding CO contract should be prefixed as PA-RFP-00200.
- **Contract ID Auto-Numbering:** If the contract does not meet any of the above conditions, the Contract ID should be set to "Next" and allow for auto-numbering.

## Lesson 1: Overview of Group Multi Supplier Contracts

Lecture 2:  
Enter  
Supplier  
Contract  
Group Multi  
Supplier  
(Parent  
Contracts)

- Within the **Contract Entry** section, users will be able to enter and review the **Contract ID, Status, Description, Administrator/Buyer, Description, Contract Version, Begin Date, Expire Date** and **Approval Due Date**.

**Note:** Constitutional Office Group Multi Supplier Approver can change status to approved for a parent contract.

**Note:** It is recommended that the Parent Contract Description be pre-fixed by the common contract style for reporting purposes.

## Lesson 1: Overview of Group Multi Supplier Contracts

### Lecture 2: Enter Supplier Contract Group Multi Supplier (Parent Contracts)

- Within the **Additional Details** tab, users will be able to enter and review the GRI, and Retainage information.

- Within the Contract Tab, the MDC allocations link is used for the user to enter the total contract allocation, the BU allocation, and the category(ies) codes.

**Bidder Group for Pools:** A bidder group is only required for contracts that involve Pools. The bidder group defines the set of bidders who will be invited to participate in a sourcing event.

**Creating Bidder Groups for Constitutional Office Pools:** If the Constitutional Office establishes its own Pool (not accessing a County Pool) in the future, a bidder group will need to be created for that Pool. In such cases, the Strategic Procurement Department will handle creating the bidder group for the Constitutional Office and provide the bidder group number. The Constitutional Office will then assign this bidder group number to the relevant contract.

## Lesson 1: Overview of Group Multi Supplier Contracts

Lecture 2:  
Enter  
Supplier  
Contract  
Group Multi  
Supplier  
(Parent  
Contracts)

Business Unit Allocation Page Help

Contract ID : GRP0000241

SetID : MDC

Bidder Group (Pool) ID :  Display Bidder Group

Total Contract Allocation:

Total BU Allocation : \$0.00

Unallocated Allocation : \$0.00

---

#	Business Unit	Business Unit Name	Business Unit Allocation	Released Amount	Remaining Allocation Balance	Assign Funding Source
1	<input type="text"/>		<input type="text"/>	\$0.00	\$0.00	<a href="#">Assign Funding Source</a> <span style="float: right;">+ -</span>

---

#	Commodity Category Code	Description
1	<input type="text"/>	

Allocation Change History      Allocation Version Snapshot

Enter the following required fields : **Total Contract Allocation, Business Unit, Business Unit Allocation, Commodity Category Code.**

Select the **OK** button.

Supply Chain Operations Contract Entry

Contract    Contract Details    Additional Details    Insurance Details

---

**Contract Entry**

**Contract**

SetID : MDC

Contract ID : GRP0000246

\*Contract Style : Police

Process Option : Group Multi Supplier

\*Status : Open

Description : HVAC

Administrator/Buyer : E133554  Fernandez-Quillet, Sonia

\*Begin Date : 09/24/2024

Expire Date : 09/24/2026

Approval Due Date :

Renewal Date :

Currency : USD

Rate Type : CRRNT

Version : 1

Status : Current

[Contract Header Agreement](#)  
[Thresholds & Notifications](#)  
[Add Comments](#)  
[Activity Log](#)  
[Group Contract Summary](#)  
[MDC Allocations](#)  
[Custom Fields](#)

**Related Contracts**

[Add Related Contract](#) Total Released Amount : 0.00 USD

Select **Save**.

The Group Multi Supplier Parent Contract has been created.

## Lesson 1: Overview of Group Multi Supplier Contracts

### Lecture 2:

#### Enter

#### Contract Approval Process

#### Supplier

**Required Fields for Parent Contract Creation:** The fields outlined above are required to create a Parent Contract. Once the contract is fully saved, it must undergo a review and approval process.

#### Contract

#### Group Multi

**Approval by GPMS Approver Role:** The GPMS Approver role is responsible for reviewing and approving the contract. This role is the only one with access to change the contract status to "Approved."

#### Supplier

#### (Parent

#### Contracts)

#### Upload Contract Documents

#### **Document Storage and Optional Vendor Access**

**Storing Contract-Related Documents:** This feature is used to store all contract-related documents securely within the system.

**Optional Vendor Access via County Supplier Portal:** Vendor access to contract-related documents through the County Supplier Portal is optional. Documents will only be made accessible to the vendor community if the user selects the "Public Document" option.

## Lesson 1: Overview of Group Multi Supplier Contracts

Lecture 2: Select the **Add Document** button.

Enter  
Supplier  
Contract  
Group Multi  
Supplier  
(Parent  
Contracts)

**Supplier Contracts Center**

Contract Entry

Contract

SetID MDC

Contract ID GRP0000242

\*Contract Style Request for Proposal

Process Option Group Multi Supplier

\*Status Open

Description

Administrator/Buyer

\*Begin Date 09/17/2024

Expire Date

Approval Due Date

Renewal Date

Currency USD

Rate Type CRRNT

Version 1

Status Current

**Add a Document**

New Version

Contract Header Agreement  
Thresholds & Notifications  
Add Comments  
Activity Log  
Group Contract Summary  
MDC Allocations  
Custom Fields

Related Contracts

Add Related Contract

Total Released Amount 0.00 USD

Select the **Document Type**, enter a **Description** and select **Import Document**.

**Create Document**

Source Purchasing Contracts [Return to Document Search](#)

SetID MDC Contract ID GRP0000242

Supplier GROUP CONTRACT MULTIPLE SUPPLIER

Contract Style Request for Proposal

\*Document Type General Contract Document

Configurator ID GENERAL Used for Group Multi Supplier Import Contract

\*Description Contract Document

\*Administrator E305819 Yuly X Chauz-Ramirez

Sponsor

Department

Cycle Start Date 09/17/2024 Cycle Due Date 10/28/2024

**Import Document**

Create Document

Save

Internal Contacts/Signers  
External Contacts/Signers  
Document View Access

## Lesson 1: Overview of Group Multi Supplier Contracts

Lecture 2: Select **Upload**, choose a file and select the **Upload** button.

Enter  
Supplier  
Contract  
Group Multi  
Supplier  
(Parent  
Contracts)

**Import Document**

SetID MDC Contract ID GRP0000242  
Supplier GROUP CONTRACT MULTIPLE SUPPLIER

\*Document Type General Contract Document  
Sponsor  
\*Administrator E305819 Yuly X Chauz-Ramirez  
Department  
Cycle Start Date 09/17/2024 Cycle Due Date 10/28/2024  
\*Description Contract Document

**Import Option**

- Current Contract/Document  
(Current Contract/Document with no formal amendments or history to load.)
- Amended Contract  
(Single current contract as fully amended requiring an amendment number. History is optional.)
- Amended Contract and Amendment  
(Current contract as fully amended and a current separate amendment summary file. History is optional.)
- Original and Amendment  
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

**Current Version**

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document						<b>Upload</b>	Clear

Prior Version is not applicable

Done with Import Cancel

**Upload Contract Document**

Choose File No file chosen

Upload Cancel

Once the document is uploaded, select the contract version (9a), status (executed), and status date (upload date). Select **Done with Import**.

Department  
Cycle Start Date 07/01/2024 Cycle Due Date 08/09/2024  
\*Description COCO Maintain Test

**Import Option**

- Current Contract/Document  
(Current Contract/Document with no formal amendments or history to load.)
- Amended Contract  
(Single current contract as fully amended requiring an amendment number. History is optional.)
- Amended Contract and Amendment  
(Current contract as fully amended and a current separate amendment summary file. History is optional.)
- Original and Amendment  
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

**Current Version**

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document	User_Preferences.docx	3.00	Execut	07/01/2024		Upload	Clear

Prior Version is not applicable

**Done with Import** Cancel

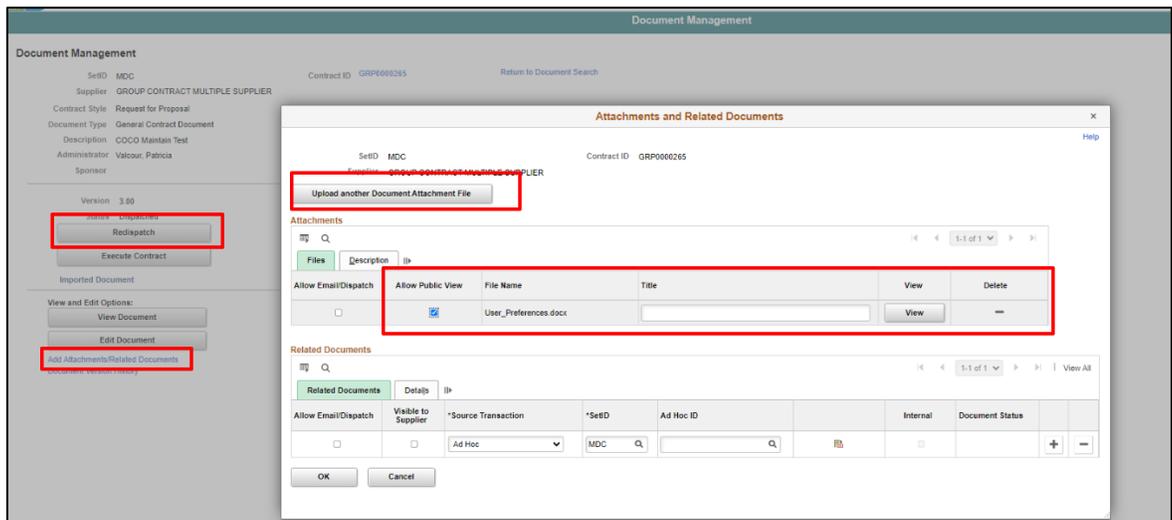
## Lesson 1: Overview of Group Multi Supplier Contracts

Lecture 2:  
Enter  
Supplier  
Contract  
Group Multi  
Supplier  
(Parent  
Contracts)

### Uploading Attachments and Making Documents Public

**Adding Attachments and Related Documents:** On the new page, select the **Redispatch** button. Select on the **Add Attachments/Related Documents** link to upload any additional files related to the contract.

**Allowing Public View for Supplier Portal:** If you want to make any documents accessible in the Supplier Portal, check the **Allow Public View** option for those documents.



## Lesson 1: Overview of Group Multi Supplier Contracts

Lecture 3:  
Approve  
Group Multi  
Supplier  
(Parent  
Contracts)

Tile Navigation: **Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contracts Center > Contract Entry > Find an Existing Value**

Classic Navigation: **Menu > Finance / Supply Chain (FSCM) > Supplier Contracts > Create Contracts and Documents > Contract Entry > Find an Existing Value**

1. Enter **Contract ID** and select **Search**.

**Contract Entry**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** | **Keyword Search** | **Add a New Value**

**Search Criteria**

SetID =

**Contract ID** begins with

Contract Version =

Version Status =

Contract Style begins with

Contract Process Option =

Short Supplier Name begins with

Supplier Name begins with

Master Contract ID begins with

Description begins with

Correct History  Case Sensitive

**Search** | **Clear** | [Basic Search](#) | [Save Search Criteria](#)

## Lesson 1: Overview of Group Multi Supplier Contracts

Lecture 3:  
Approve  
Group Multi  
Supplier  
(Parent  
Contracts)

2. Verify the following fields are complete:
  - a. - Description
  - b. - Buyer
  - c. - Begin Date
  - d. - Expiration Date

The screenshot shows the 'Supplier Contracts Center' interface. The 'Contract Entry' section is active. The following fields are highlighted with red boxes:

- Administrator/Buyer:** E328229
- Description:** Emerg. Repair Roof
- \*Begin Date:** 08/12/2024
- Expiration Date:** 04/25/2025

Other visible fields include: SetID MDC, Contract ID TP-000025508, Status Open, Contract Version 1, Approval Due Date, Primary Contact Rodriguez, Bryan, \*Contract Style Purchase Order, Process Option Purchase Order, \*Supplier ALABAO ROO-001, \*Supplier ID 0000105013, Supplier Contract Ref TP-000025508, Master Contract ID, Renewal Date, Control Type Business Unit, and Currency USD.

3. Select the **Additional Details** tab.

The screenshot shows the 'Supplier Contracts Center' interface with the 'Additional Details' tab selected. The layout is identical to the previous screenshot, but the 'Contract' tab is no longer active.

## Lesson 1: Overview of Group Multi Supplier Contracts

Lecture 3:  
Approve  
Group Multi  
Supplier  
(Parent  
Contracts)

4. Verify the **GRI** is correct.

The screenshot shows the 'Supplier Contracts Center' interface. At the top, there are tabs for 'Contract' and 'Additional Details'. Below the tabs, contract information is displayed: SetID, MDC, Version (1), and Contract ID (TP-000025508). A 'Relate Contract' section contains the following fields: Parent Contract (MCC-PROGRAM-7040), Parent GRI (M - Mixed Funding), GRI (X - No Grant Funding - w/o UAP), IG (Y), UAP (N), Retainage % (0.000), and Retainage Amount. At the bottom of the form are buttons for Save, Return to Search, Notify, Refresh, Add, Update/Display, and Correct History.

5. Select the **Contract** tab. Select the MDC Allocation link.

The screenshot shows a menu with the following items: Status, Current, Contract Header Agreement, Thresholds & Notifications, Add Comments, Activity Log, Group Contract Summary, **MDC Allocations** (highlighted with a red box), and Custom Fields.

6. Verify the following are correct:
  - a. **Total Contract Allocation**
  - b. **Business Unit**
  - c. **Business Unit Allocation**
  - d. **Commodity Category Code**

## Lesson 1: Overview of Group Multi Supplier Contracts

### Lecture 3: Approve Group Multi Supplier (Parent Contracts)

Business Unit Allocation Page Help

Contract ID : GRP0000243  
 SetID : MDC  
 Bidder Group (Pool) ID : 1128 Display Bidder Group

**Total Contract Allocation:**

Total BU Allocation : \$0.00  
 Unallocated Allocation : \$5,000.00

Business Unit	Business Unit Name	Business Unit Allocation	Released Amount	Remaining Allocation Balance	Funding Source	Assign Funding Source		
1 PA	Property Appraiser	<input type="text"/>	\$0.00	\$0.00	General Fund	Assign Funding Source	+	-

Commodity Category Code	Description		
00001	All Categories	+	-

[Allocation Change History](#)    [Allocation Version Snapshot](#)

7. Select **OK**.
8. Change the **Status** from **Open** to **Approved**.

Contract

Contract Details

Additional Details

Insurance Details

**Contract Entry**

**Contract**

SetID MDC

Contract ID GRP0000243

\*Contract Style

Process Option Group Multi Supplier

\*Status 
 Open  
**Approved**  
 Canceled  
 Closed  
 On-Hold  
 Open

Description

Administrator/Buyer

\*Begin Date

Expire Date 09/20/2025

Approval Due Date

Renewal Date

Currency USD

Rate Type CRRNT

25

## Lesson 1: Overview of Group Multi Supplier Contracts

### Lecture 3: Approve Group Multi Supplier (Parent Contracts)

9. Select **Save**. The GMS Parent Contract has been approved.

The screenshot displays a contract management interface with the following details:

Contract ID	GRP0000243
Contract Style	Property Appraiser
Process Option	Group Multi Supplier
* Status	Approved
Description	Test
Administrator/Buyer	
Begin Date	09/20/2024
Expire Date	09/20/2025
Approval Due Date	
Renewal Date	
Currency	USD
Rate Type	CRRNT

Below the details is a section for **Related Contracts** with a text input field containing "Add Related Contract".

At the bottom, there are four buttons: **Save** (highlighted in green), **Return to Search**, **Notify**, and **Refresh**.

At the very bottom, there is a breadcrumb trail: [Contract](#) | [Contract Details](#) | [Additional Details](#) | [Insurance Details](#)

**Lesson 1: Overview of Group Multi Supplier Contracts**

**Key Terms**

The following key terms are used in this Lesson:



Term	Definition
<b>Contract Description</b>	Brief detail regarding the abouts of the contract.
<b>Contract ID</b>	An Assigned ID for each contract to improve traceability and unique to each contract.
<b>Contract Style</b>	Purchase Order, Sourcing, and Ad-hoc are examples of Contract Style.
<b>Supplier</b>	Organizations that are actively doing business or have done business in the past with the County, or otherwise receiving payments from the County. Supplier data is used in the following transactions: Sourcing Opportunities (RFPs, RFQs, etc.), contracts, requisition, purchase order entry, receiving/returning goods, voucher entry, payments for goods/services purchased.
<b>Supplier ID</b>	An Assigned ID for each Supplier for traceability and unique to each supplier.

## Lesson 1: Lesson Summary

### Lesson Summary



Having completed the Overview of Group Multi Supplier Contracts lesson, users should be able to:

- Understand the Basics of the Group Multi Supplier Contract
- Enter Supplier Contract Group Multi Supplier (Parent Contracts)
- Approve Group Multi Supplier (Parent Contracts)

## Module 3: Create and Approve Child Contracts

### Lessons

This module includes the following lessons:

- Enter Supplier Contract Details
- Create Contract Lines
- Relate Contract to Group Multi Contract-Customization

## Lesson 1: Enter Supplier Contract Details

**Lesson 1:** At the conclusion of this lesson, users will be able to:

**Introduction**

- Enter Supplier Contract Group Multi Supplier (Parent Contracts)
- Approve Group Multi Supplier (Parent Contract)

## Lesson 1: Enter Supplier Contract Details

### Lesson 1: Introduction

The INFORMS Supplier Contracts module enables users to create and execute contracts between a department and County/Constitutional Office suppliers for any agreed goods and services to be purchased. This application will allow the users to define products on a contract and specify the terms and conditions. Supplier Contracts can be established through the awarding of a Sourcing Event response or as a child contract from a previously existing Group Multi Supplier contract.

The INFORMS Supplier Contracts module allows a number of user-defined contract statuses. These statuses help User manage the contract life cycle, trigger an email notification when a status change occurs, and enforce contract security.

**Note:** Constitutional Office Contract Administrator is responsible for creating Parent and Child contracts.

**Lesson 1: Enter Supplier Contract Details**

**Key Terms**

The following key terms are used in this Lesson:



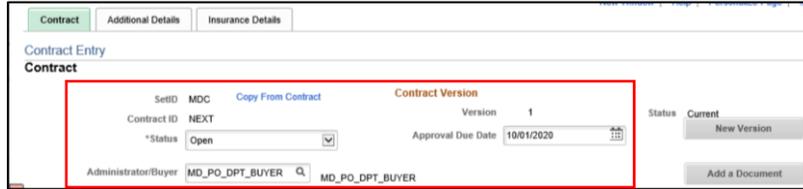
Term	Definition
<b>Invoice</b>	Is a commercial document that itemizes and records a transaction between a buyer and a seller.
<b>Supplier</b>	Organizations that are actively doing business or have done business in the past with the County/Constitutional Office or otherwise receive payments from the County/Constitutional Office. Supplier data is used in the following transactions: Sourcing Opportunities (RFPs, RFQs, etc.), contracts, requisition, purchase order entry, receiving/returning goods, voucher entry, payments for goods/services purchased.
<b>Threshold</b>	A limit at a specified amount in the contract that could trigger an alert or notification

## **Lesson 1: Enter Supplier Contract Details**

Lecture 1: Enter Supplier Contract Header Details

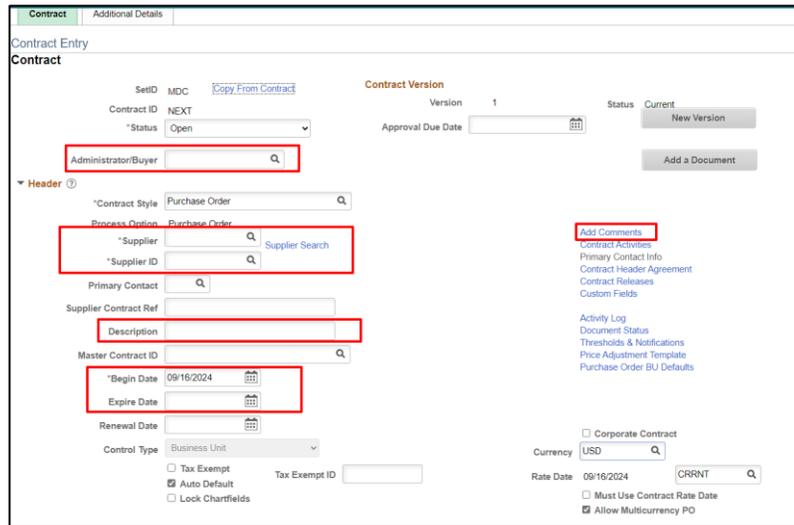
Navigate to the **Contract Entry** Search page:  
**Finance/Supply Chain > Supply Chain Operations > Supplier Contracts Center > Contract Entry**

1. Select the **Add New Value** tab, **Style ID**, and **Contract Process Option**. Next, select the **Add** button.

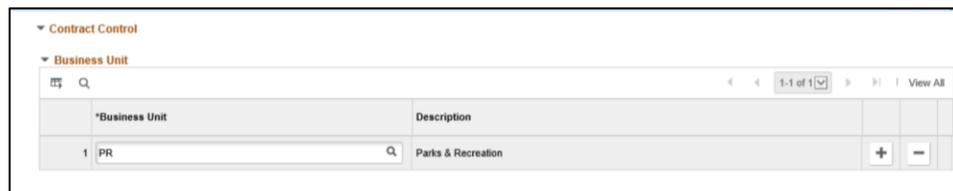


**Note:** SetID defaults to MDC and Contract ID defaults to NEXT. These values should not be changed. The only SetID value is MDC and the Contract ID should be auto generated by keeping NEXT in the Contract ID field.

2. Enter or review the **Contract Header Details** which outline the **Contract Style**, **Supplier ID** (10 Digit ID Number), **Description** (Free Form Text Field), **Begin and End Dates**, and Comments (Comments are first added by clicking on the **Add Comments** hyperlink).



3. In the Contract Controls section, each department will enter their own **Business Unit** on the Supplier Contract so that no other Business Unit will be able to use this Supplier Contract. Users have the ability to procure the items identified in the Contract Lines.



The **Business Unit** should also be included in the **Purchase Order BU Defaults** link.

## Lesson 1: Enter Supplier Contract Details

Lecture 2:  
 Enter  
 Supplier  
 Contract  
 Purchase  
 Order  
 Contract  
 Style (Child  
 Contracts)

Users also have the ability to set default, if desired, **Header, Shipping,** and **Distribution values** on Purchase Orders created from the contract through the **Purchase Order BU Defaults** for each of the contract associated with business units. When a Purchase Order Buyer copies a Contract into a Purchase order, these values will automatically default, so double entry will not be needed. These fields are optional in the creation of a Purchase Order Contract (child contract). Only selecting the Business Unit is required.

## Lesson 1: Enter Supplier Contract Details

### Lecture 3: Create and Maintain Spend Thresholds and Notifications

In INFORMS, Supplier Contracts users will have the ability to set a **Spend Threshold** or a specific monetary amount for a contract or contract item. When Spend Threshold is defined, the system can notify users when spending on a transactional contract crosses the threshold amount.

The Spend Threshold is available at the contract header, contract line, and contract category levels. The notification is a standard INFORMS workflow event that is triggered through the application engine program.

In addition to the worklist, INFORMS can e-mail notifications. E-mail notifications are triggered using the same conditions as workflow notifications. The decision to create a worklist, send an e-mail, or to do both depends on the user-profile workflow-routing preferences.

A single notification is sent when the amount reaches the threshold. If the user changes the Spend Threshold amount on the header or a line, INFORMS deletes existing notifications on the header or the changed line and reevaluates the threshold when the user runs the application engine job again. This action enables the user to keep increasing the Spend Threshold amount and to be notified as necessary.

To set up INFORMS to process contract-level Spend Threshold amounts:

## Lesson 1: Enter Supplier Contract Details

### Lecture 3: Create and Maintain Spend Thresholds and Notifications

1. Access the **Contract Entry - Contract Page** and select the **Thresholds & Notifications** link.

The screenshot shows a contract entry page with several input fields on the left: 'Expire Date' (09/07/2020), 'Approval Due Date', 'Renewal Date', 'Currency' (USD), and 'Rate Type' (CRRNT). On the right, a vertical menu contains links: 'Contract Header Agreement', 'Thresholds & Notifications' (highlighted with a red box), 'Add Comments', 'Activity Log', 'Group Contract Summary', 'MDC Allocations', and 'Custom Fields'.

2. Select the **Spend Threshold Notification** check box.
3. Define the threshold amount.
4. Select the notification type and at least one user to whom the user wants to send notifications.
5. Use the **Notification Assignments** grid to make these selections. Examples of notification types include **maximum amount**, **renew**, and **draft due** notifications.
6. Select **OK**.

The screenshot shows the 'Thresholds & Notifications' dialog box. At the top, there are two checkboxes: 'Send Date/Amount Notification' and 'Send Threshold Notification' (checked and highlighted with a red box). Below these are sections for 'Date Notification' and 'Spend Threshold Notification'. The 'Spend Threshold Notification' section is expanded, showing 'Released Threshold Notification Amount' set to 0.00 USD and 'Total Released Amount' also at 0.00. At the bottom, there is a 'Notification Assignments' table with columns for 'Notification Type', 'User ID', 'User Description', and 'Email Address'. The 'OK' button at the bottom left is highlighted with a red box.

	Notification Type	User ID	User Description	Email Address		
1	[dropdown]	[input]			+	-

## Lesson 1: Enter Supplier Contract Details

### Lecture 3: Create and Maintain Spend Thresholds and Notifications

Use this page to set the Spend Threshold amount and the number of days, before the contract expiration, to notify a buyer or administrator.

The information that the user enters is used with INFORMS Workflow notifications when the contract is about to expire or run out of money. Notifications are a standard INFORMS workflow event that is triggered through the application engine program. In addition to updating a worklist, INFORMS can send email notifications, which are triggered by the same conditions as workflow notifications. The decision to create a worklist, send an email, or both depends on the user-profile and workflow-routing preferences.

## Lesson 1: Lesson Summary

### Lesson Summary



Having completed the Contract Details lesson, users should be able to

- Enter Supplier Contract Header Details for Group Multi supplier style (parent), and Purchase order style (child contracts)
- Copy Existing Contract Details
- Create and Maintain Spend Thresholds and Notifications

## Lesson 2: Enter Supplier Contract Lines

**Lesson 2:** At the conclusion of this lesson, user will be able to:

### Introduction

- Enter Supplier Contract Line Details
- Assign Contract Category Codes
- Copy Existing Contract Details

## Lesson 2: Enter Supplier Contract Lines

### Lesson 2: Introduction

After creating the contract header, the user can begin creating contract lines for the contract by adding Item IDs or Descriptions to the contract. **Item IDs** represent the goods and services for procurement. These can be defined in advance, or they can be created on an ad-hoc basis specifically for the contract. If users are awarding an event that already has Item IDs on the Sourcing Event, then those items should be used on the Supplier Contract. Attributes assigned to the item appear by default in the contract lines, along with contract header-level data that pertains to the contract line, but these can be overridden at the line level.

The INFORMS Supplier Contract module allows users to leverage **Contract Categories** enabling the user to specify larger groups of items on a contract, rather than having to enter the items one at a time. When creating requisitions and purchase orders tied to a Supplier Contract, INFORMS locates and verifies that it automatically uses the appropriate contracts through the defined category code. These Contract Categories can be used in conjunction with existing contract line item IDs.

Within the Supplier Contract Lines, the user can set and/or override specific Spend Thresholds and Notifications for individual line items similar to how they can be defined at the Contract Header level.

**Lesson 2: Enter Supplier Contract Lines**

**Key Terms**

The following key terms are used in this Lesson:



Term	Definition
<b>Contract Document</b>	A textual document the user can associate with a transactional purchasing contract, solicitation or a Purchase Order. Contract Documents are signed agreements that bind buyers and suppliers to specific terms and conditions.

## Lesson 2: Enter Supplier Contract Lines

### Lecture 1: Enter Supplier Contract Line Details

1. Each item appears on the contract as a distinct **Contract Line number**. From this page, the user can view or access all details defined for a contract line.

Line	Item	Description	UOM	Category	Include for Release	Status
1		GENERAL CONSTRUCTION	EA	90638	<input type="checkbox"/>	Active

View Category Hierarchy      Category Search

2. After entering items into the contract, the **Contract - Lines** tabs enable the user to view and enter all required distribution details for the contracted items.
3. Each contract line item is associated with its own **Category** and can be associated to ChartFields (i.e. **Accounting Distributions**). When ChartFields will always be the same in all transactions, it is best to enter the ChartFields as part of the Contract so that these values will default on the Purchase Order.

Contract Entry  
PO Distributions for Line 1

Contract 0000003135      Version 1      Line 1      GENERAL CONSTRUCTION

Distribution By Business Unit

Business Unit: FN      SpeedChart:      + -

Distribution

Dist	Percent	GL Unit	Fund	Dept	Account	Grant	PC Bus Unit	Project	Activity	Source Type	Category
1	100.0000	MDADE	G4001	PR07030300	5496900000	NO-GRANT					

OK      Cancel      Refresh

## Lesson 2: Enter Supplier Contract Lines

### Lecture 2: Assign Contract Category Codes

When the user links a **Category** or a group of categories to a contract, requisitions and purchase orders can reference the contract with any items within those categories. A category can encompass a larger number of items for procurement from a particular Supplier.

Line	Category	Description	Status
1	90638	General Construction, Architectural Services	Active

Use the **Lines grid** to define basic information for contract category line items. Category information helps reduce redundant data entry during both item setup and requisition and purchase order processing. Item categories can provide transaction information for requisitions and requests for quotes, contracts, and purchase orders and can serve as the organizational unit for item catalogs. With categories tied to contracts, requisitions and purchase orders can reference the contract with any items within those categories.

## Lesson 2: Enter Supplier Contract Lines

### Lecture 3: Copy Existing Contract Details

The INFORMS Supplier Contract module provides a tool to assist users with entering similar or multiple contracts with the same header details. By searching and selecting an existing **Contract ID** to copy, users can minimize the amount of time needed to repeat similar or related data entry points for a new Supplier Contract’s Header Details. Even if a user needs to change a handful of values on the copied contract, it is still advantageous to copy a Contract that has already been created to reduce data entry.

1. When creating a new Supplier Contract, select the **Copy From Contract** hyperlink.
2. Users will be directed to a page to help them identify a specific **Contract ID** they wish to copy or all of the Contract IDs for a given Supplier.

**Copy Contract ID**

Contract Entry

**Copy Contract**

SetID MDC  
Contract ID NEXT

**Contract Search**

Contract ID: 0000003135  
Supplier:   
Supplier ID:   
Master Contract ID:   
 Allow Open Item Reference

**Select Contract**

Sel	Contract ID	Version	Description	Supplier ID	Short Supplier Name	Supplier Contract Ref
<input checked="" type="checkbox"/>	0000003135	1	DESIGN-BUILD-CONST AGENCY SVCS	0000011714	ROYAL CARI-002	

## Lesson 2: Lesson Summary

### Lesson Summary



Having completed the Relate Contract to Allocation lesson, users should be able to

- Enter Supplier Contract Line Details
- Assign Contract Category Codes
- Copy Existing Contract Details

### **Lesson 3: Relate Contract to Group Multi Supplier Contract-Customization**

**Lesson 3:** At the conclusion of this lesson, user will be able to:

- Introduction**
- Associate Supplier Contracts to Group Multi Supplier Contracts

### Lesson 3: Relate Contract to Group Multi Supplier Contract-Customization

**Lesson 3:** INFORMS' Supplier Contracts module supports the UAP/IG business process requirements by establishing a parent-child relationship between Group Multi Supplier Contracts and Supplier Contracts.

#### Introduction

As stated previously, the **GRI** (Grant Restriction Indicator) is set at the parent contract level on the Group Multi Supplier Contract for both pool and fixed price contracts. Contracts flagged with all GRI values except *M* (Mixed Funding) will inherit the flag value from the master contract. Each child Supplier Contract and subsequent PO issued to the suppliers will inherit the GRI flag value from the master contract for all contracts except those marked with *M* (Mixed Funding) as GRI value. Department Users will not have access to change the GRI value, set at the master contract level or the Child contract level for all GRI except those marked with *M* (Mixed Funding) GRI value.

Contracts flagged with GRI value of *M* (Mixed Funding) at the master contract level allows for child Supplier Contracts to be created with any of the available GRI values if the user has the proper security permissions. Subsequent Purchase Orders will inherit the GRI of the Supplier Contract they are issued against - the PO Buyer will not be able to change this value.

**Lesson 3: Relate Contract to Group Multi Supplier Contract-Customization**

**Key Terms**

The following key terms are used in this Lesson:



Term	Definition
<b>Agreements</b>	Agreements, also called deliverables, provide a mechanism to define and manage internal and external agreements for the contract.

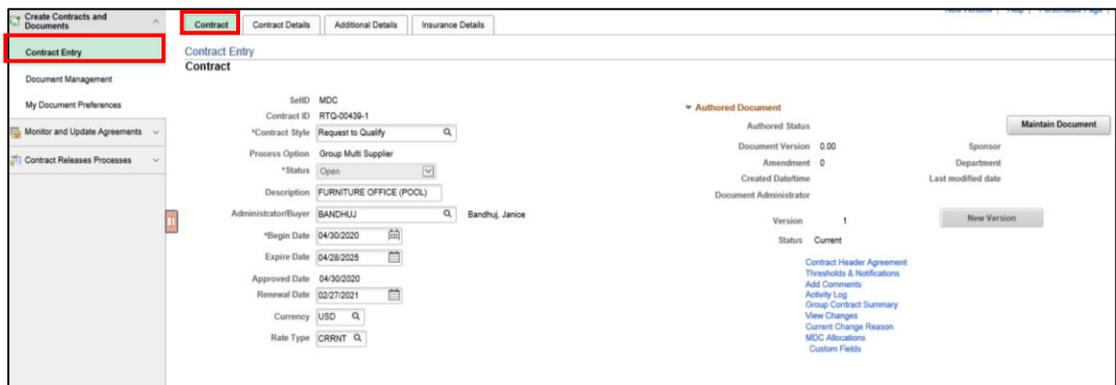
### Lesson 3: Relate Contract to Group Multi Supplier Contract-Customization

Lecture 1:  
Associate  
Supplier  
Contracts to  
Group Multi  
Supplier  
Contracts

A child Supplier Contract can be related to a Group Multi Supplier Contract in one of two ways, either at the parent contract level or the child contract level.

To relate a contract at the parent level:

1. Navigate to the **Supplier Contracts Center: Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contracts Center**
2. Select the **Contract Entry** from the **Create Contracts and Documents** menu.
3. Select for either an existing **Group Multi Supplier contract (parent)** or **Supplier Contract (child)** by selecting the appropriate Contract Process Option.
4. By selecting a **Group Multi Supplier** the select results will display any of the parent contracts the user wishes to establish a Child Supplier Contract for.



5. Then, scroll down to the Related Contracts section of the page and Select the **Add Related Contracts** link.
6. A pop-up window will display for the user to select a Child Supplier Contract to link to the parent Group Multi Supplier Contract.

### Lesson 3: Relate Contract to Group Multi Supplier Contract-Customization

Lecture 1:  
Associate  
Supplier  
Contracts to  
Group Multi  
Supplier  
Contracts

7. Upon checking the **Select** checkbox and Searching the **OK** button, the identified Supplier Contract will be displayed as a related contract for the Group Multi Supplier Contract.
8. This will populate the Supplier Contract with the **UAP/IG** and **GRI values** from the Group Multi Supplier Contract.

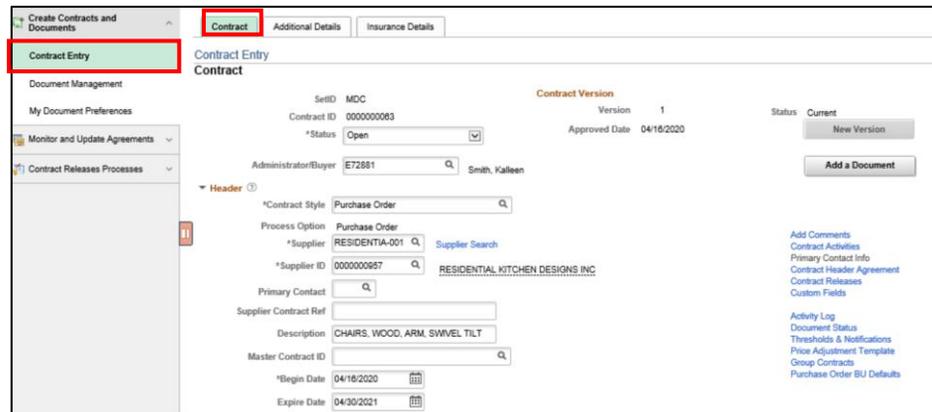
Contract ID	Relationship Status	Begin Date	Contract Style	Supplier	Total Released Amount	Currency	Document	Amendment
1 0000000062	Active	03/26/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	18000.00	USD		
2 0000000063	Active	03/27/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	80000.00	USD		
3 0000000066	Active	04/01/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	18000.00	USD		
4 0000000063	Active	04/16/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	1800.00	USD		
5 0000000069	Active	04/27/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	88175.00	USD		
6 0000000071	Active	04/28/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	180000.00	USD		

### Lesson 3: Relate Contract to Group Multi Supplier Contract-Customization

Lecture 1:  
Associate  
Supplier  
Contracts to  
Group Multi  
Supplier  
Contracts

To relate a contract at the child level:

1. Navigate to the **Supplier Contracts Center: Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contracts Center**
2. Select the **Contract Entry** from the Create Contracts and Documents menu.
3. Select for an existing open contract with Purchase Order as the Contract Process Option.
4. This will display the child level Supplier Contract the user wish to relate to a parent Group Multi Supplier Contract.



**Note:** The Constitutional Office Procurement/Contract Manager can change the approval status for a child contract.

5. Then, select the **Additional Details** tab, displaying the **UAP/IG** and **GRI** fields for the Supplier Contract. To populate these fields, the user would enter or Select from the existing Group Multi Supplier Contact, the user wishes to relate.

GRI Value	GRI Value Description
F	Federal Funding Clauses
A	General Contracts
M	Mixed Funding
N	No Grant Compliance/No Grant Funding Allowed w/ UAP
S	State Funding Clauses
T	Federal Transit Administration Funding Clauses
U	No Grant Compliance/No Grant Funding Allowed - w/o IG
X	No Grant Compliance/No Grant Funding Allowed - w/o UAP

6. Select **Save**.

The Supplier Contract is saved and approved through the **Supplier Contract Approval Workflow**, and all subsequent PO's sourced from the Supplier Contract will carry forward the UAP/IG and GRI values established on the parent Group Multi Supplier.

### Lesson 3: Lesson Summary

#### Lesson Summary



Having completed the Relate Contract to Group Multi Supplier Contract-Customization lesson, users should be able to:

- Associate Supplier Contracts to Group Multi Supplier Contracts

## Module 4: Course Summary

### Course Summary

The Course Summary module covers three topics:

- Course Content Summary
- Additional Training and Job Aids



## Module 4: Course Summary

### Objectives Achieved



Congratulations! Users have completed the Departmental Supplier Contract Management course. Users now should be able to:

- Understand the End-to-End Process for Departmental Supplier Contract Management
- Overview of Group Multi Supplier Contracts
- Set up Purchase Order Contracts
- Relate PO contract to allocation
- Manage Contract Deliverables
- Set up Contract Releases
- Understand Document Management

## Module 4: Course Summary

### Additional Training and Job Aids

Users also have the following resources available:

#### **Job Aids**

- Create Group Multi Supplier (GMS – Parent Contract) Job Aid
- Create a new PO Child Contract Job Aid

For additional Information, be sure to visit:

- [Miamiade.gov/informs](http://Miamiade.gov/informs)

## Module 4: Course Summary

**Key Terms** The following key terms are used in this course:



Term	Definition
<b>Agreements</b>	Agreements, also called deliverables, provide a mechanism to define and manage internal and external agreements for the contract.
<b>Amendment</b>	An amendment is a formal or official change made Supplier Contract.
<b>Collaboration</b>	An optional function used when creating contract documents to share and track edits to documents across internal and external collaborators.
<b>Collaborators</b>	Internal or external users, other than the primary owner of the contract, who can review or change contract documents. Collaborators can be added or deleted by document owners at any time.
<b>Contract Description</b>	Brief detail regarding the abouts of the contract.
<b>Contract Document</b>	A textual document the user can associate with a transactional purchasing contract, solicitation or a Purchase Order. Contract Documents are signed agreements that bind buyers and suppliers to specific terms and conditions.
<b>Contract ID</b>	An Assigned ID for each contract to improve traceability and unique to each contract.
<b>Contract Style</b>	Purchase Order, Sourcing and Ad-hoc are examples of Contract Style
<b>Digital Signatures</b>	Cryptographically-based signature assurance schemes that are tied to users by a digital identity certificate. INFORMS Supplier Contract Management supports the ability to lock down the Microsoft Word version of a contract and prepare an equivalent and separate PDF file that the system uses to capture signatures only. The users can capture signatures at any time.
<b>Invoice</b>	Is a commercial document that itemizes and records a transaction between a buyer and a seller.

## Module 4: Course Summary

**Key Terms** The following key terms are used in this course:



Term	Definition
<b>Supplier</b>	Organizations that are actively doing business or have done business in the past with the County/Constitutional Office or otherwise receive payments from the County/Constitutional Office. Supplier data is used in the following transactions: Sourcing Opportunities (RFPs, RFQs, etc.), contracts, requisition, purchase order entry, receiving/returning goods, voucher entry, payments for goods/services purchased.
<b>Supplier ID</b>	An Assigned ID for each Supplier for traceability and unique to each supplier.
<b>Threshold</b>	A limit at a specified amount in the contract that could trigger an alert or notification.
<b>Transactional Purchasing Contract</b>	System-entered contract data against which the user can reference and enforce contractual agreements, such as contracted items, quantities, and prices on procurement transactions. This type of contract is created and maintained within the Purchasing or Supplier Contract Management modules.