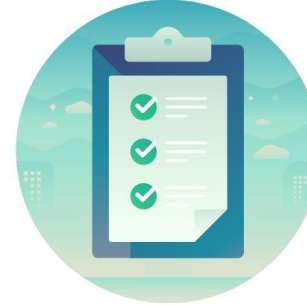


Course ID: SCM 205
Course: Departmental Supplier Contract
Management

Ground Rules



Be on time



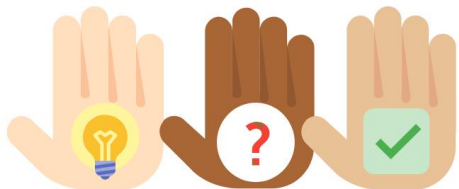
Attendance



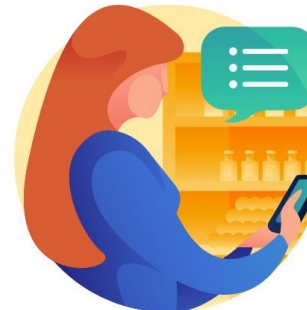
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

Course Overview

Course Description	<p>This course provide comprehensive review of the Departmental Supplier Contract Management processes.</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none">• Module 1: Course Introduction• Module 2: Group Multi Supplier Contracts• Module 3: Supplier Contracts• Module 4: Document Management• Module 5: Course Summary
Training Audiences	<p>The following audience(s), by INFORMS Security role(s) are required to complete th is course prior to being granted related system access:</p> <ul style="list-style-type: none">• Departmental Contract Administrator• QA Specialist• Central GRI• Supplier Contract Collaboration Team Member• Librarian• Librarian Approver• GMS Approver• Central Contract Admin (PCO)

Course Overview

Prerequisites	<p>Participants are required to complete the following End-User Training courses prior to starting this course:</p> <ul style="list-style-type: none">• ERP 101 – Overview of INFORMS• ERP 102 – INFORMS Navigation, Reporting, and Online Help• SCM 101 – Supply Chain Management Fundamentals
Delivery Method	<ul style="list-style-type: none">• This course is intended to be delivered through Instructor-led Training.
Estimated Duration	<ul style="list-style-type: none">• The total duration of this course, when delivered through Instructor-led Training, is 4.5 hours.

Course Outline

Content

Module 1: Course Introduction

Module 2: Group Multi Supplier Contracts

- Lesson 1: Overview of Group Multi Supplier Contracts

Module 3: Supplier Contracts

- Lesson 1: Contract Details
 - Lecture 1: Enter Supplier Contract Header Details
 - Lecture 2: Copy Existing Contract Details
 - Lecture 3: Create and Maintain Spend Thresholds and Notifications
- Lesson 2: Enter Supplier Contract Lines
 - Lecture 1: Enter Supplier Contract Line Details
 - Lecture 2: Assign Contract Category Codes
 - Lecture 3: Create and Maintain Line Level Spend Thresholds and Notifications

Course Outline

Content

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

- Lecture 1: Associate Supplier Contracts to Group Multi Supplier Contracts

Module 4: Document Management

- Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Documents

- Lecture 1: Ad-Hoc Contract
- Lecture 2: Create a Sourcing Event Document
- Lecture 3: Create a Purchasing Contract

- Lesson 2: Collaborate on Documents

- Lecture 1: Collaborate on Documents

- Lesson 3: Negotiate Supplier Contract Document

Course Outline

Content

- Lesson 4: Approve Supplier Contract Document
 - Lecture 1: Submit for Approval
 - Lecture 2: Approve Contract Document
- Lesson 5: Execute Supplier Contract Document
 - Lecture 1: Dispatch Supplier Contract
 - Lecture 2: Execute Supplier Contract Document
- Lesson 6: Amend Supplier Contract Standard
 - Lecture 1: Amend Contract Document

Module 5: Course Summary

Module 1: Course Introduction

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Key Changes to the Business Process

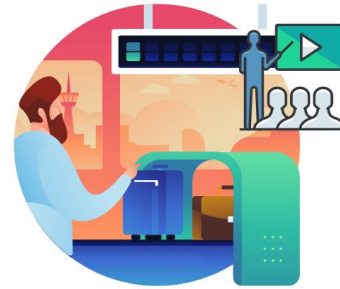
The End-to-End Business Process

Introduction to Demonstrations, Activities and Exercises

Course Administration and Logistics



To receive credit for completing this course, you must record your attendance at the beginning and end of class



Please turn off your cell phones and refrain from checking email and the Internet while in class



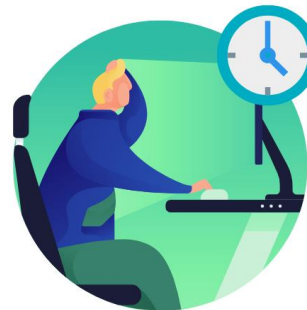
Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



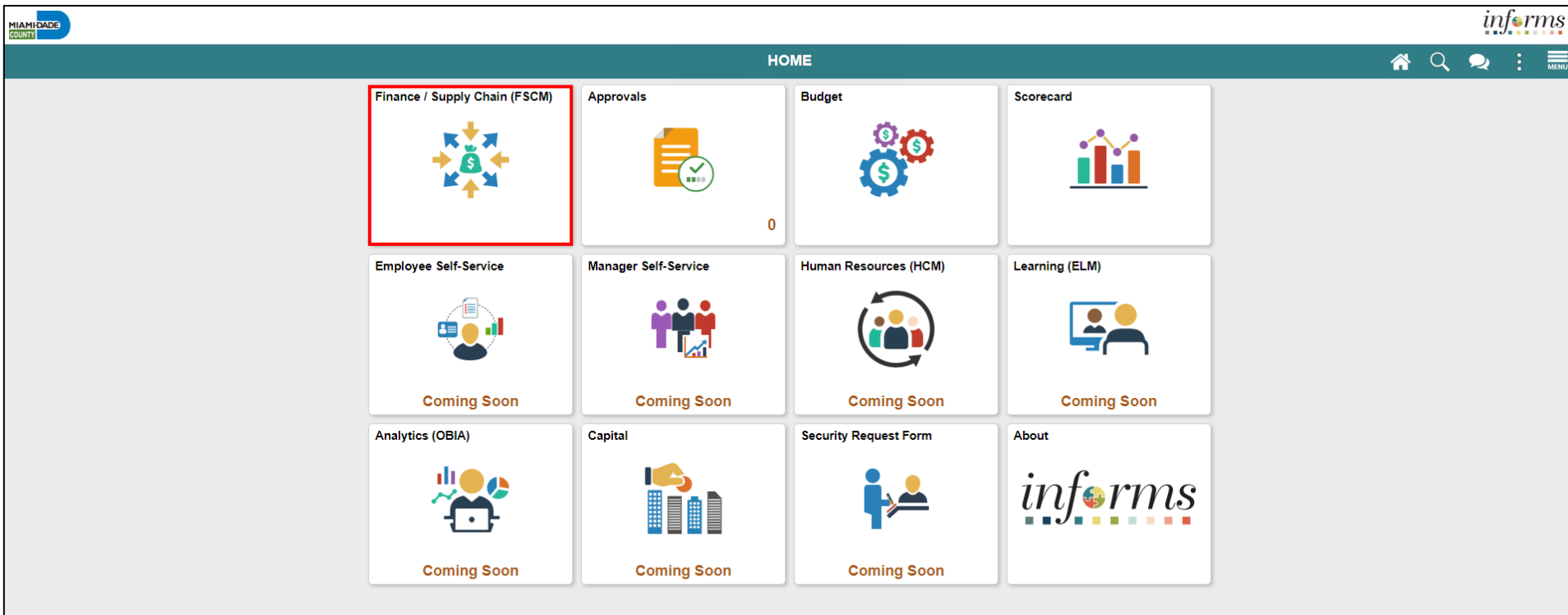
Be back from Breaks on time

Learning Objectives

- 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
- Relate PO contract to allocation
- Manage Contract Deliverables
- Set up Contract Releases
- Understand Document Management

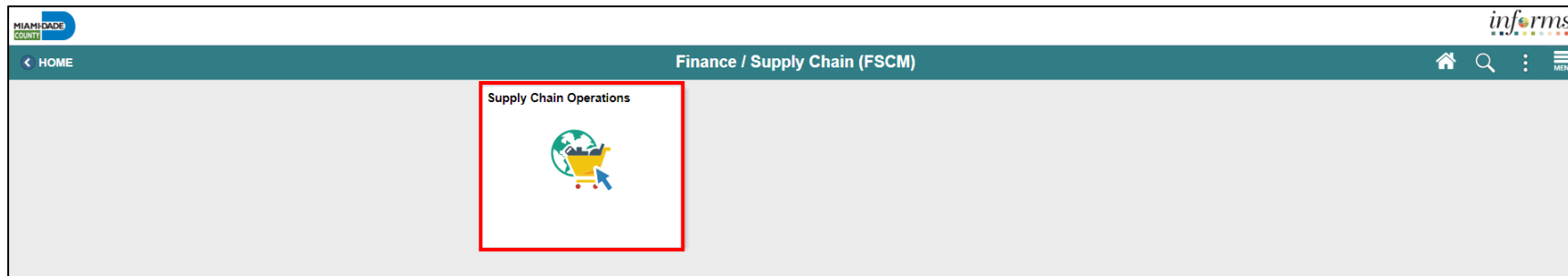
Navigation

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



Navigation

2. Select **Supply Chain Operations**



3. Select **Supplier Contracts Center**



Roles and Responsibilities

Role	Responsibilities
Departmental Contract Administrator	The Department Contract Admin has the ability to create and manage a Supplier Contract.
Central GRI	The Central GRI will assign and modify Grant Restriction Indicator (GRI) value on a Group Multi Supplier Contract.
QA Specialist	The QA Specialist will have the ability to review and update the Group Multi Supplier Contract to ensure compliance with procurement governance.
Supplier Contract Collaboration Team Member	The Supplier Contract Collaboration Team Member has the ability to collaborate and review contract documents.
Librarian	The Librarian is responsible for creating and maintaining the contract clauses library.
Librarian Approver	The Librarian Approver has the ability to approve clauses before they are available to be used in the system.
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.

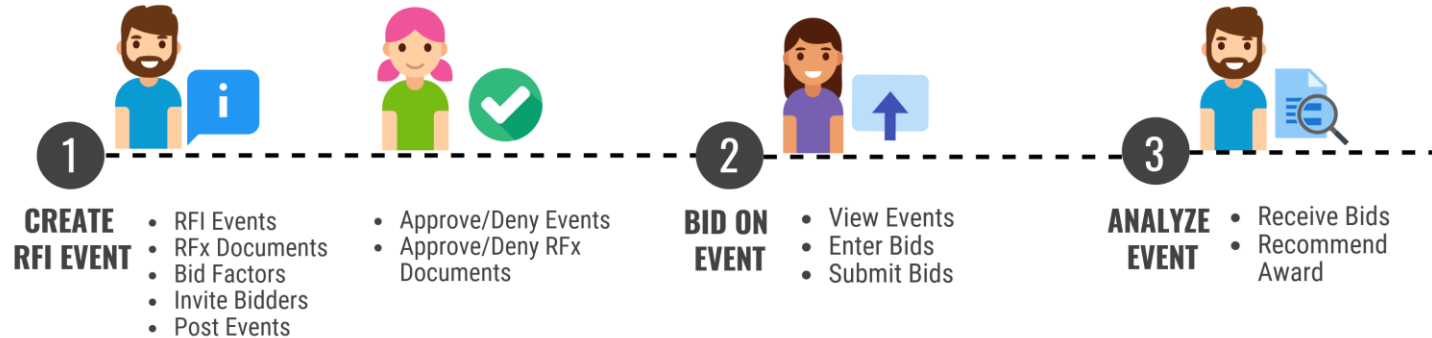
Key Changes to the Business Process

- Supplier Contract
 - DocuSign eSignature will be available to use sign contract documents electronically
 - Document Collaboration functionality which includes routing documents for comments, editing online
 - Contract Administrator will have the ability to establish the transactional contract shell in INFORMS
- Sourcing
 - Sourcing will be automated
 - Enhanced collaboration with key stakeholders
 - Automated approval notifications
 - Effectively track bidder participation and results

The End-to-End Business Process

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.



ROLES

Strategic Sourcing Buyer



Buyer role responsible for creating and analyzing sourcing events.

Strategic Sourcing Event Approver



Approver role responsible for approving or denying sourcing events & RFx Documents.

Bidder/Supplier



Bidder/Supplier role responsible for submitting qualifications on a bid.

Central Contract Administrator

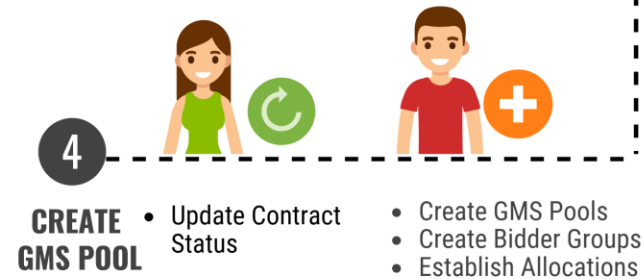


Administrator role responsible for creating and maintaining supplier contract documents to include contract agreements, modifications, OTR etc.

GMS Approver



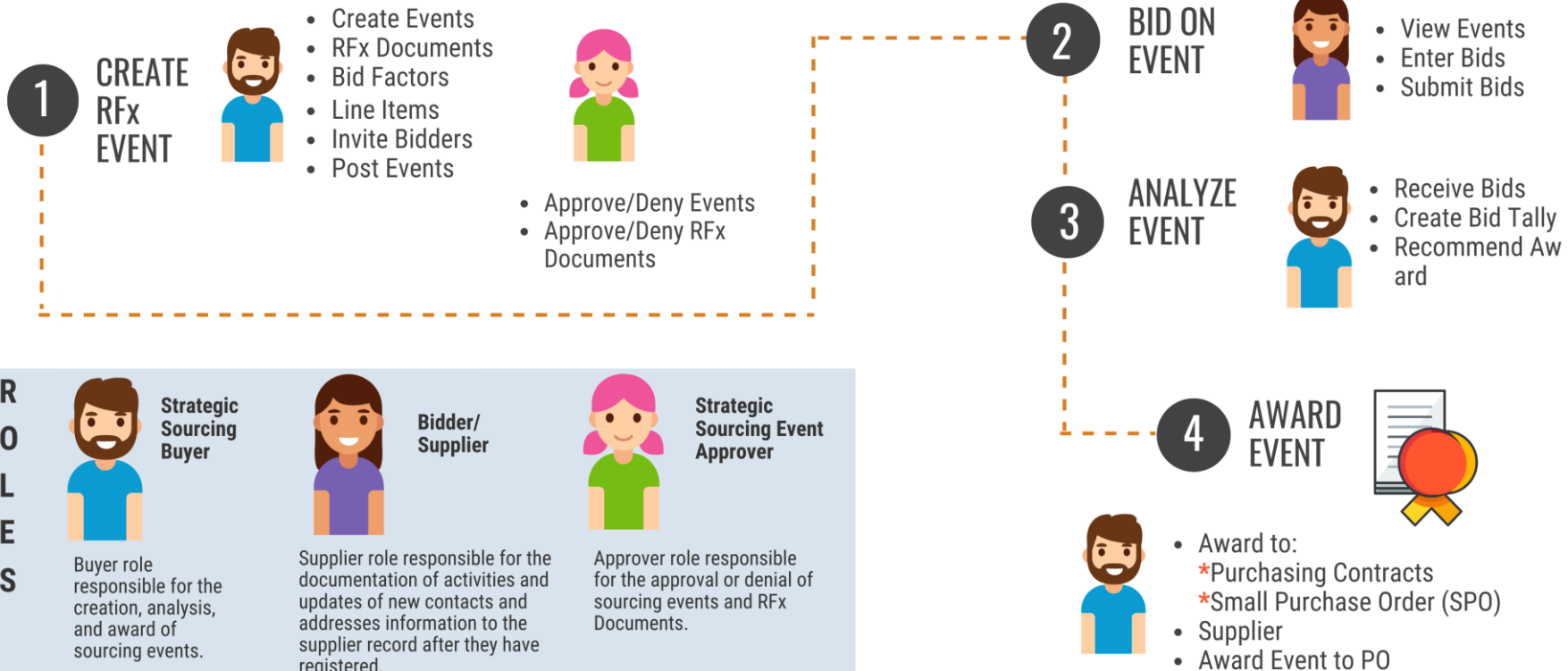
Approver role responsible for updating the contract entry status on a GMS contract.



The End-to-End Business Process

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.

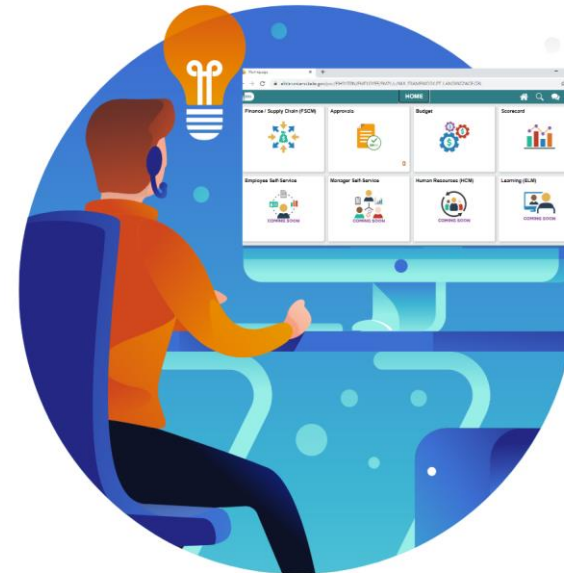


Introduction to Activities and Exercises

- You will take part in two types of hands-on learning throughout this course.



Training
Activities



Training
Exercises

Module 1: Course Introduction Summary

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Key Changes to the Business Process

The End-to-End Business Process

Introduction to Demonstrations, Activities and Exercises

Module 2: Group Multi Supplier Contract

Module Topics

Module Introduction

Lesson 1: Overview of Group Multi Supplier Contract

Lesson 1: Overview of Group Multi Supplier Contract

- Understand Group Contracts Process Options

Lesson 1: Key Terms

Term	Definition
Amendment	An amendment is a formal or official change to the contract
Contract Description	Brief detail regarding the abouts of the contract
Contract ID	An Assigned ID for each contract to improve traceability and unique to each contract
Contract Style	Purchase Order, Sourcing and Ad-hoc are examples of Contract Style
Supplier	Vendor who has an awarded contract with the County.
Supplier ID	A unique auto-assigned ID for each Supplier. Note: INFORMS Supplier ID numbers are different from the Vendor ID numbers (FEIN) in FAMIS. The Vendor ID numbers in FAMIS are an attribute on the Supplier record and can be used on some search pages as a criterion.

Lesson 1: Overview of Group Multi Supplier Contract

- The Group Contract feature enables the users to link multiple standards, manufacturers, or special purpose contracts to an overall parent or group contract for viewing and reporting purposes
- Group Multi Supplier contracts provide the ability 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
- Like other Supplier Contracts, the Group Multi Supplier Contract works with supplier contract documents, agreements, and workflow notifications

Lesson 1: Activities and Exercises



Module 2: Group Multi Supplier Contract Summary

Module Topics

Module Introduction

Lesson 1: Overview of Group Multi Supplier Contract

Module 3: Supplier Contracts

Module Topics

Module Introduction

Lesson 1: Contract Details

Lesson 2: Create Contract Lines

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

Lesson 1: Enter Supplier Contract Details

- Enter Supplier Contract Header Details
- Copy Existing Contract Details
- Create and Maintain Spend Thresholds and Notifications

Lesson 1: Key Terms

Term	Definition
Amendment	An amendment is a formal or official change made contract
Invoice	Is a commercial document that itemizes and records a transaction between a buyer and a seller
Supplier	Suppliers that are already doing business with the County may submit bid responses. Each Supplier will have indicated category codes (commodity codes) that in which they would like to be associated.
Threshold	A limit (on spend); A specified amount that may trigger an alert or notification.

Lesson 1: Enter Supplier Contract Details

- The INFORMS Supplier Contracts module enables users to create and execute revenue – generating contracts between a department and County suppliers for any agreed goods and services to be purchased
- Users will be able 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

Lecture 1: Enter Supplier Contract Header Details

- The INFORMS Supplier Contract Entry Page is comprised of four main sections:
 1. Contract Details
 2. Contract Header
 3. Contract Items
 4. Contract Categories

Lecture 1: Enter Supplier Contract Header Details

To create a Supplier Contract, navigate to: **Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contracts Center**

- **Note:** SetID will default to MDC and Contract ID will default 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.

The screenshot displays the 'Supplier Contracts Center' interface. On the left is a navigation pane with the following items: 'Supply Chain Operations' (selected), 'Create Contracts and Documents', 'Contract Entry' (highlighted), 'Document Management', 'My Document Preferences', 'Monitor and Update Agreements', and 'Manage Contract Library'. The main area is titled 'Contract Entry' and contains three buttons at the top: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. Below these are four input fields: 'SetID' with the value 'MDC', 'Contract ID' with the value 'NEXT', 'Style ID' with the value 'PO', and 'Contract Process Option' with a dropdown menu showing 'Purchase Order'. A green 'Add' button is located at the bottom left of the form area. At the bottom of the screen, there are links for 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'.

Lecture 1: Enter Supplier Contract Header Details

Supply Chain Operations **Supplier Contracts Center**

Header ?

*Contract Style: Purchase Order

Process Option: Purchase Order

*Supplier: BANK OF AM-001 [Supplier Search](#)

*Supplier ID: 0000000010 [Bank of America NA](#)

Primary Contact:

Supplier Contract Ref:

Description: PROCUREMENT CONTRACT

Master Contract ID:

*Begin Date: 10/01/2020

Expire Date: 10/01/2025

Renewal Date:

Control Type: Business Unit

☐ Tax Exempt ☐ Lock Chartfields

☒ Auto Default

Tax Exempt ID:

[Add Comments](#)

[Contract Activities](#)

[Primary Contact Info](#)

[Contract Header Agreement](#)

[Contract Releases](#)

[Custom Fields](#)

[Activity Log](#)

[Document Status](#)

[Thresholds & Notifications](#)

[Price Adjustment Template](#)

[Purchase Order BU Defaults](#)

☐ Corporate Contract

Currency: USD

Rate Date: 07/10/2020 CRRNT

☐ Must Use Contract Rate Date

☒ Allow Multicurrency PO

Lecture 2: 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

Lecture 2: Copy Existing Contract Details

COPY CONTRACT ID

Help

Contract Entry

COPY CONTRACT

SetID MDC

Contract ID NEXT

Contract Search

Contract ID 0000003135

Supplier

Supplier ID

Master Contract ID

Allow Open Item Reference

Search

Select Contract

Contracts More Details

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	

Lecture 3: Create and Maintain Spend Thresholds and Notifications

- Within INFORMS Supplier Contracts, users will have the ability to set a Spend Threshold or a specific monetary amount for a contract or contract item
- In addition to defining a Spend Threshold, Supplier Contract Management provides the Contract Alert Workflow component to notify buyers when Spend Thresholds have been reached
- 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

Lecture 3: Create and Maintain Spend Thresholds and Notifications

Expire Date	09/07/2020	
Approval Due Date		
Renewal Date		
Currency	USD	
Rate Type	CRRNT	

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

[Custom Fields](#)

Thresholds & Notifications

☐ Send Date/Amount Notification ☒ Send Threshold Notification

[Expand All](#) [Collapse All](#)

▼ Date Notification
Notify user when contract is within specified days of Expire Date.
Expire Date 03/22/2025 Notify Days Before Expires
Expiration Notification Date 03/22/2025
Notify user when contract is within specified days of Renewal Date.
Renewal Date 02/22/2025 Notify Days Before Renewal
Renewal Notification Date 02/22/2025
Notify user when New Contract or Draft is within specified days of Approval Due Date.
Approval Due Date Notify Days Before Approval
Approval Notification Date

▼ Maximum Amount Notification
Notify user when the total contract released amount is either within the specified amount, or within the specified percentage, of the maximum contract amount.
Amount Less than Maximum USD
Percent Less than Maximum
Notification Amount

▼ Spend Threshold Notification
Notify user when the released amount exceeds the threshold.
Released Threshold Notification Amount 0.00 USD

Lesson 1: Activities and Exercises



Lesson 2: Enter Supplier Contract Lines

- Enter Supplier Contract Line Details
- Assign Contract Category Codes
- Create and Maintain Line Level Spend Thresholds and Notifications

Lesson 2: Key Terms

Term	Definition
Contract	INFORMS Contracts, revenue recognition and billing are independent decisions, so the users can satisfy customers' demands while adhering to proper revenue recognition practices without manual intervention or accounting workarounds
Contract Document	A textual document the users 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.
Supplier	Suppliers that are already doing business with the County may submit bid responses

Lesson 2: Enter Supplier Contract Lines

- After the user creates a contract header, contract lines for the contract can be created by adding Item IDs or Descriptions to the contract
- Item IDs represent the goods and services that the users is contracted for procurement
- The INFORMS Supplier Contract module allows users to leverage Contract Categories enabling the users 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, the system locates and verifies that it uses the appropriate contracts automatically through the defined category code
- Within the Supplier Contract Lines the users can set and/or override specific Spend Thresholds and Notifications for individual line items

Lecture 1: Enter Supplier Contract Line Details

Contract Entry






Contract Items

Catalog Search Item Search Search for Contract Lines

Lines

1-1 of 1 | View All

Details Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings Spend Threshold ||>

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

[View Category Hierarchy](#) [Category Search](#)

PO Distributions for Line 1

[Contract Entry](#) [Help](#)

PO Distributions for Line 1

Contract 0000003135 Version 1 Line 1 GENERAL CONSTRUCTION

Distribution By Business Unit

Business Unit SpeedChart

Distribution

Details Asset Information ||>

Dist	Percent	GL Unit	Fund	Dept	Account	Grant	PC Bus Unit	Project	Activity	Source Type	Category
1	100.0000	MDADE <input type="text"/>	G4001 <input type="text"/>	PR07030300 <input type="text"/>	5496900000 <input type="text"/>	NO-GRANT <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

Lecture 2: Assign Contract Category Codes

- When linking 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 Supplier.

Contract Entry

Contract Categories

Lines

Details

Pricing Options

Release Amounts

Spend Threshold

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

Lecture 3: Create and Maintain Line Level Spend Thresholds and Notifications

- Similar to how it's defined at the Contract Header level Spend Thresholds can be defined for individual items and category codes
- The Contract Line Entry Spend Threshold tab will allow the users to define Spend Thresholds for purchasing contracts at the line level
- This section defines Spend Threshold amounts for the line or category and whether users should be notified when the Spend Threshold is reached

Lecture 3: Create and Maintain Line Level Spend Threshold and Notification

Contract Entry

Home

Flag

More

Lines

1-1 of 1

View All

Details

Order By Amount

Item Information

Default Schedule

Release Amounts

Release Quantities

Line Groupings

Spend Threshold

Line	Item	Description	Notify on Spend Threshold	Threshold Notification Amount	Total Line Released Amount		
1	<div><div></div><div></div></div>	GENERAL CONSTRUCTION	<input type="checkbox"/>	100000.00	0.00	<div>+..</div>	<div>-</div>

View Category Hierarchy

Category Search

Contract Categories

Lines

1-1 of 1

View All

Details

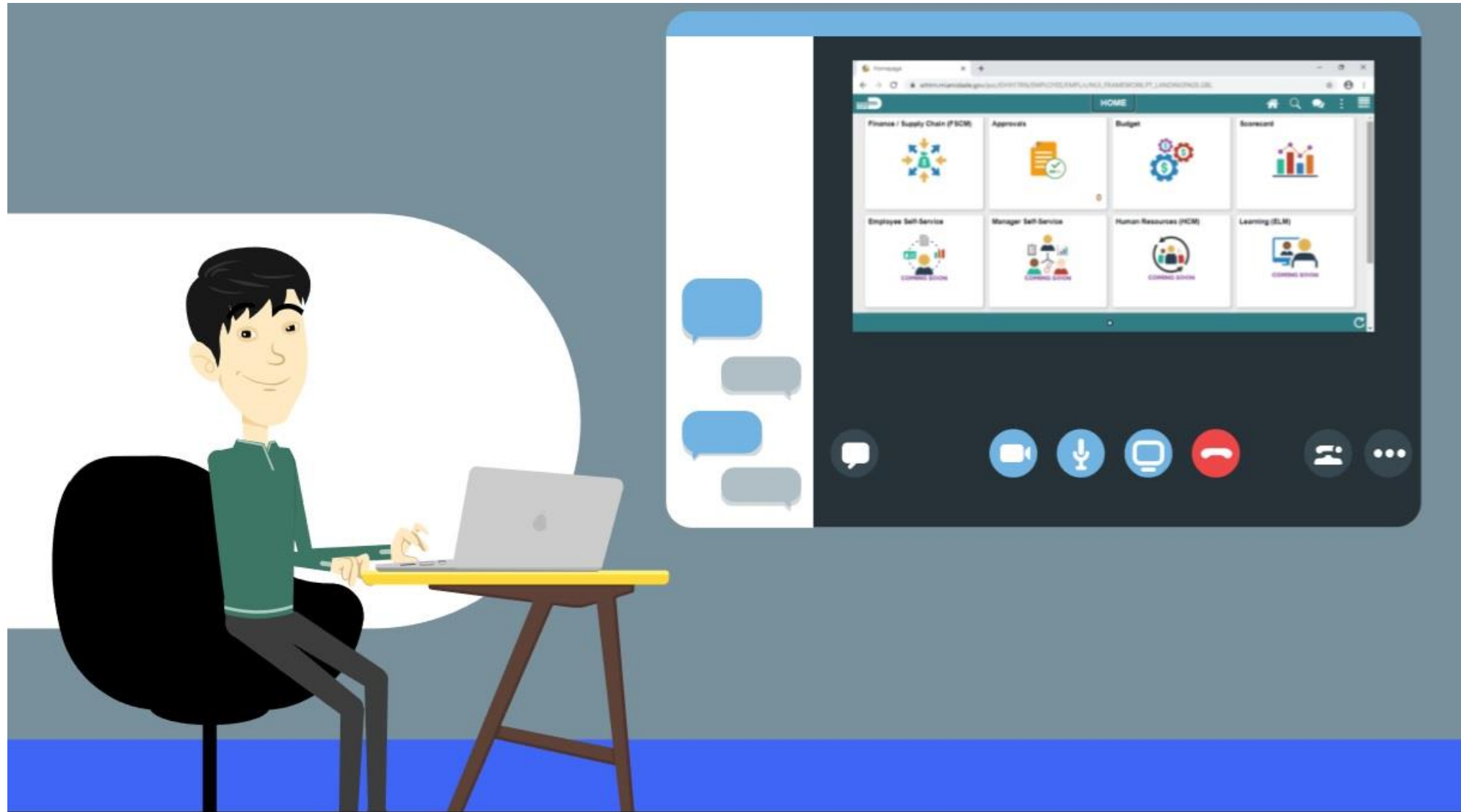
Pricing Options

Release Amounts

Spend Threshold

Line	Category	Notify on Spend Threshold	Threshold Notification Amount	Total Line Released Amount		
1	90638	<input type="checkbox"/>	100000.00		<div>+..</div>	<div>-</div>

Lesson 2: Activities and Exercises



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

- Associate Procurement Contracts to Group Multi Supplier Contracts

Lesson 3: Key Terms

Term	Definition
Agreements	Provide a mechanism to define and manage internal and external agreements for the contract, these are also known as deliverables.
Contract Document	A textual document the users 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.
Supplier	Suppliers that are already doing business with the County may submit bid responses.

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

- INFORMS' Supplier Contracts module will continue to support the UAP/IG business process requirements by establishing a parent-child relationship between Group Multi Supplier Contracts and Supplier Contracts
- GRI (Grant Restriction Indicator) is set at the parent contract level on the Group Multi Supplier Contract for both pool and fixed price contracts

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

- 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
- 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 other GRI values if the users has the proper security permissions

Lecture 1: Associate Supplier Contracts to Group Multi Supplier Contracts

A child Supplier Contract can be related to a Group Multi Supplier Contract on two different levels:

- Parent contract level
- Child contract level

Lecture 1: Associate Supplier Contracts to Group Multi Supplier Contracts

To relate a Contract at the Parent level, navigate to: **Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contracts Center > Create Contract and Document > Contract Entry**

The screenshot displays the 'Supplier Contracts Center' interface. On the left, a sidebar contains navigation links: 'Create Contracts and Documents' (highlighted with a red box), 'Contract Entry' (highlighted with a green box), 'Document Management', 'My Document Preferences', 'Monitor and Update Agreements', and 'Contract Releases Processes'. The main area is titled 'Contract Entry' and 'Contract'. It features a tabbed interface with 'Contract' selected, and sub-tabs for 'Contract Details', 'Additional Details', and 'Insurance Details'. The form contains the following fields:

- SetID: MDC
- Contract ID: RTQ-00439-1
- *Contract Style: Request to Qualify
- Process Option: Group Multi Supplier
- *Status: Open
- Description: FURNITURE OFFICE (POOL)
- Administrator/Buyer: BANDHUJ (Bandhuj, Janice)
- *Begin Date: 04/30/2020
- Expire Date: 04/28/2025
- Approved Date: 04/30/2020
- Renewal Date: 02/27/2021
- Currency: USD
- Rate Type: CRRNT

On the right, the 'Authorized Document' section shows:

- Authorized Status: 0.00
- Document Version: 0.00
- Amendment: 0
- Created Date/time: [blank]
- Document Administrator: [blank]
- Version: 1
- Status: Current

Buttons include 'Maintain Document' and 'New Version'. A list of links is provided at the bottom right: Contract Header Agreement, Thresholds & Notifications, Add Comments, Activity Log, Group Contract Summary, View Changes, Current Change Reason, MDC Allocations, and Custom Fields.

Lecture 1: Associate Supplier Contracts to Group Multi Supplier Contracts

Supply Chain Operations

Create Contracts and Documents

Contract Entry

Document Management

My Document Preferences

Monitor and Update Agreements

Contract Releases Processes

Supplier Contracts Center

Rate Type CRRNT

Current Change Reason
MDC Allocations
Custom Fields

Related Contracts

Add Related Contract

Total Released Amount 359775.00 USD

Related Contracts

	Contract ID	Relationship Status	Begin Date	Contract Style	Supplier	Total Released Amount	Currency	Document	Amendment
1	0000000052	Active	03/26/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	16000.00	USD		
2	0000000053	Active	03/27/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	80000.00	USD		
3	0000000056	Active	04/01/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	16000.00	USD		
4	0000000063	Active	04/16/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	1600.00	USD		
5	0000000069	Active	04/27/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	86175.00	USD		
6	0000000071	Active	04/28/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	160000.00	USD		

Lecture 1: Associate Supplier Contracts to Group Multi Supplier Contracts

To relate a Contract at the Child level, navigate to: **Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contracts Center > Create Contract and Document > Contract Entry**

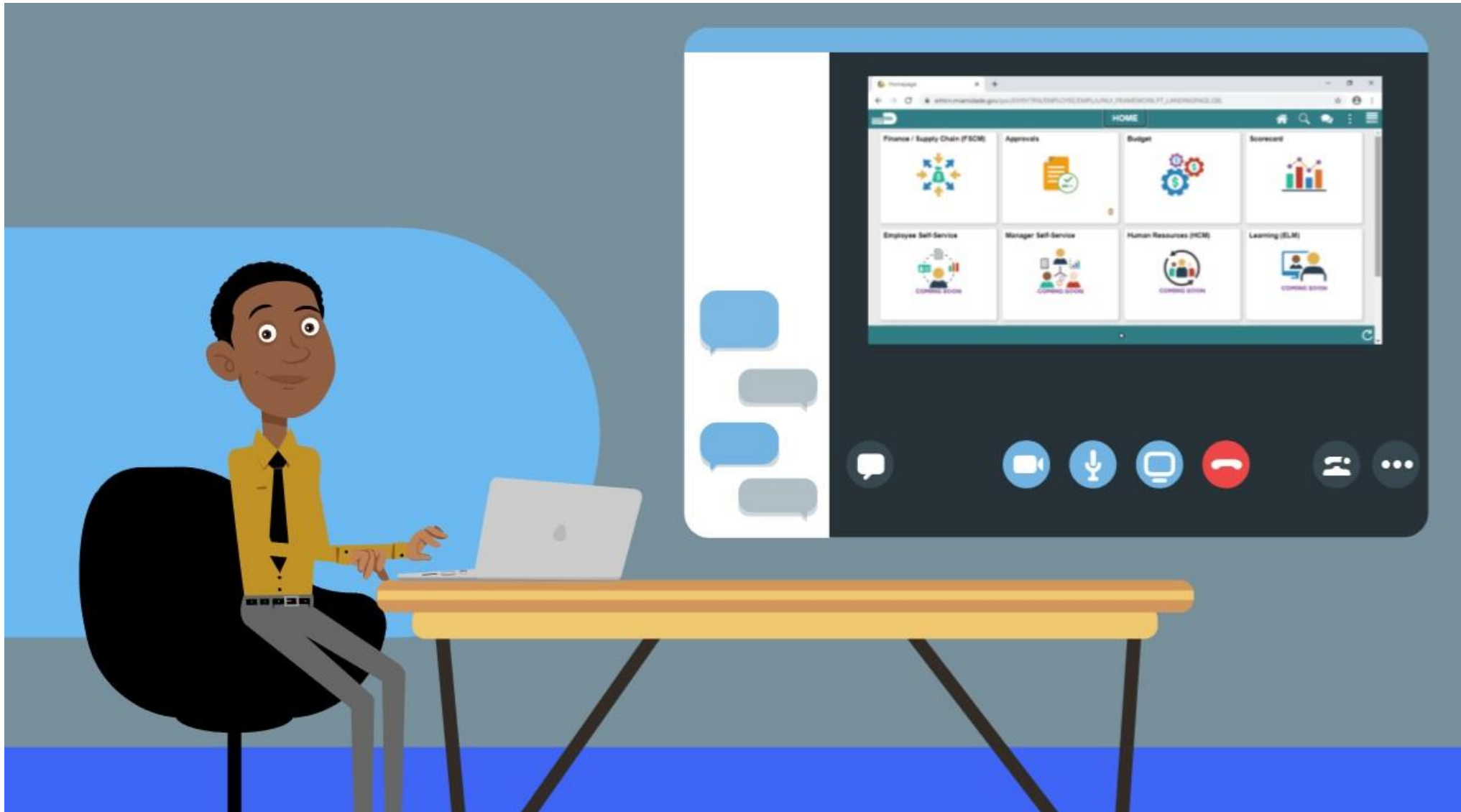
The screenshot displays the 'Supplier Contracts Center' interface. On the left, a navigation pane shows 'Create Contracts and Documents' with 'Contract Entry' highlighted. The main area is titled 'Contract Entry' and contains a form for creating a contract. The form includes fields for 'SetID' (MDC), 'Contract ID' (0000000083), 'Contract Version' (1), 'Status' (Current), and 'Approved Date' (04/18/2020). There are buttons for 'New Version' and 'Add a Document'. The 'Administrator/Buyer' field is set to 'E72881' and 'Smith, Kalleen'. The 'Header' section includes fields for '*Contract Style' (Purchase Order), 'Process Option' (Purchase Order), '*Supplier' (RESIDENTIA-001), and '*Supplier ID' (0000000857). The supplier name 'RESIDENTIAL KITCHEN DESIGNS INC' is displayed. Other fields include 'Primary Contact', 'Supplier Contract Ref', 'Description' (CHAIRS, WOOD, ARM, SWIVEL TILT), 'Master Contract ID', '*Begin Date' (04/18/2020), and 'Expire Date' (04/30/2021). On the right, there are links for 'Add Comments', 'Contract Activities', 'Primary Contact Info', 'Contract Header Agreement', 'Contract Releases', 'Custom Fields', 'Activity Log', 'Document Status', 'Thresholds & Notifications', 'Price Adjustment Template', 'Group Contracts', and 'Purchase Order BU Defaults'.

Lecture 1: Associate Supplier Contracts to Group Multi Supplier Contracts

- GRI Values and its Description

GRI Values	GRI 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

Lesson 3: Activities and Exercises



Module 3: PO Contracts Summary

Module Topics

Module Introduction

Lesson 1: Contract Details

Lesson 2: Create Contract Lines

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

Module 4: Document Management

Module Topics

Module Introduction

Lesson 1: Create Purchasing Contract, Supplier Contract and Ad-Hoc Documents

Lesson 2: Collaborate on Documents

Lesson 3: Negotiate Supplier Contract Document

Lesson 4: Approve Supplier Contract Document

Lesson 5: Execute Supplier Contract Document

Lesson 6: Amend Supplier Contract Document

Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Documents

- The Supplier Contract Document Management application works in conjunction with the transactional contract and Purchasing functionality in the Supplier Contract and Purchasing modules, and Events, in the Strategic Sourcing module
- This integration is accomplished by linking Microsoft Word-based authored documents to source transactional elements
- The source transactions available for creating documents are ad-hoc documents, contract documents, Sourcing Event documents, and purchasing documents

Lesson 1: Key Terms

Term	Definition
Collaboration	An optional function used when creating contract documents to share and track edits to documents across internal and external collaborators.
Supplier	Suppliers that are already doing business with the County may submit bid responses.
Transactional Purchasing Contract	System-entered contract data against which the users 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.

Lecture 1: Ad-Hoc Contract

- To create an ad-hoc contract, navigate to: **Finance/Supply Chain Tile**
> Supply Chain Operations Tile > Supplier Contracts Center Tile > Document Management

The screenshot displays the 'Supplier Contracts Center' interface. On the left is a navigation sidebar with the following items: 'Supply Chain Operations' (selected), 'Create Contracts and Documents' (with an upward arrow), 'Contract Entry', 'Document Management' (highlighted in green), 'My Document Preferences', 'Monitor and Update Agreements' (with a downward arrow), and 'Manage Contract Library' (with a downward arrow). The main content area is titled 'Add a Document' and contains the following fields:





- *Source Transaction: A dropdown menu with 'Ad Hoc' selected.
- *SetID: A text input field containing 'MDC' with a search icon to its right.
- *Ad Hoc ID: A text input field containing 'NEXT'.
- *Description: A text input field containing two blue dots.
- *Contract Style: A dropdown menu.
- *Document Type: A dropdown menu.

At the bottom of the form are four buttons: 'Add a Document' (green), 'Copy Document' (grey), 'Import Document' (grey), and 'Find an Existing Document' (blue link).

Lecture 1: Ad-Hoc Contract

Supplier Contracts Center

Create Document



[New Window](#) | [Help](#) | [Personalize Page](#)

Create Document

[Return to Document Search](#)

SourceAd Hoc

SetIDMDC

Ad Hoc IDMOD0000019

*Contract StyleAdhoc Document

*Document TypeMod Recommendation

Configurator IDMOD RECOMMENDATIONModification Recommendation Memo

*DescriptionBU_MD_CTL_CONTRACT_ADMIN

*AdministratorBU_MD_SC_CTL_CONTRACT_ADMIN

Sponsor

Department

*Begin Date08/21/2020

Expire Date

Cycle Start Date08/21/2020

Cycle Due Date10/01/2020

Create Document

Import Document

Save

[Internal Contacts/Signers](#)
[External Contacts/Signers](#)
[Document View Access](#)

Lecture 2: Create a Sourcing Event Document

- To create a sourcing event, navigate to: **Finance / Supply Chain (FSCM) tile > Supply Chain Operations tile > Supplier Contracts Center > Create Contracts and Documents > Document Management**

The screenshot shows the 'Supplier Contracts Center' interface. On the left is a navigation pane with the following items: 'Create Contracts and Documents' (expanded), 'Contract Entry', 'Document Management' (highlighted in green), 'My Document Preferences', 'Monitor and Update Agreements', 'Manage Contract Library', and 'Contract Releases Processes'. The main area is titled 'Add a Document' and contains the following fields and buttons:

- *Source Transaction: Ad Hoc (dropdown)
- *SetID: MDC (text input with search icon)
- *Ad Hoc ID: NEXT (text input)
- *Description: (empty text input)
- *Contract Style: (empty dropdown)
- *Document Type: (empty dropdown)

At the bottom of the main area are four buttons: 'Add a Document' (green), 'Copy Document' (grey), 'Import Document' (grey), and 'Find an Existing Document' (blue link). The top right of the interface includes a home icon, a search icon, a menu icon, and links for 'New Window', 'Help', and 'Personalize Page'.

Lecture 2: Create a Sourcing Event Document

[New Window](#) | [Help](#)

Find an Existing Document

*Source Transaction	<input type="text" value="Purchasing Contracts"/>	
Contract Style	<input type="text"/>	
Document Type	<input type="text"/>	
*SetID	<input type="text" value="MDC"/>	<input type="text" value="Contract ID"/>
Supplier SetID	<input type="text" value="MDC"/>	<input type="text" value="Supplier ID"/>
Supplier Name	<input type="text"/>	<input type="text" value="Short Supplier Name"/>
Description	<input type="text"/>	
Administrator	<input type="text"/>	
Sponsor	<input type="text"/>	
Department	<input type="text"/>	

☒ All Statuses
☐ Draft/Collaborated
☐ Pending Internal Collaboration/Review
☐ Pending External Collaboration/Review
☐ Pending Approval
☐ Approved
☐ Dispatched

► **Additional Search Criteria**

[Keyword Search](#)

Lecture 3: Purchasing Contract

- To create a purchasing contract, navigate to: **Main Menu > Supplier Contracts > Create Contracts and Documents > Document Management**

Add a Document

*Source Transaction	<input type="text" value="Purchasing Contracts"/>
*SetID	<input type="text" value="MDC"/>
*Contract ID	<input type="text" value="GRP0000044"/>
*Description	<input type="text" value="Training"/>
*Contract Style	<input type="text" value="Request to Qualify"/>
*Document Type	<input type="text" value="General Contract Document"/>

[Find an Existing Document](#)

Lecture 3: Purchasing Contract

Create Document

[Return to Document Search](#)

Source

Purchasing Contracts

SetID

MDC

Contract ID

GRP0000043

Supplier

Group Contract Multiple Supplier

Contract Style

Request to Qualify

*Document Type

General Contract Document

Configurator ID

GENERAL

Used for Group Multi Supplier Import Contract

*Description

GMS Contract

*Administrator

MD_SC_CTL_ADMIN_01

MD_SC_CTL_ADMIN_01

Sponsor

Department

Cycle Start Date

09/30/2020

Cycle Due Date

11/10/2020

Create Document

Import Document

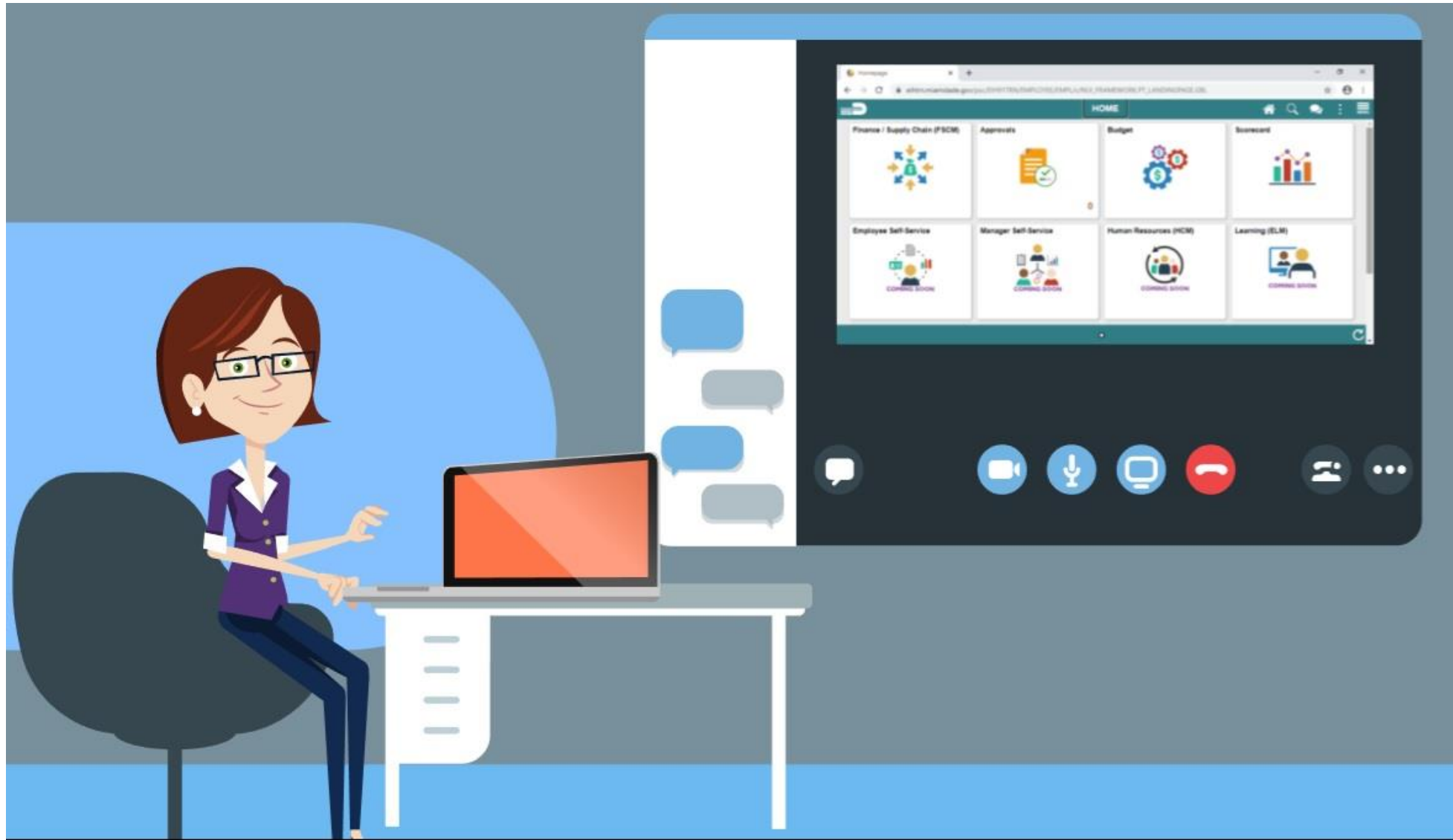
Internal Contacts/Signers

External Contacts/Signers

Document View Access

Save

Lesson 1: Activities and Exercises



Lesson 2: Collaborate on Documents

- The Collaboration function is used when creating contract documents to share and track edits to documents across internal and external collaborators
- Collaboration is initiated when the Route Internally process is initiated as discussed in the previous lesson
- The selected collaborators can access the document using the Worklist

Lesson 2: Key Terms

Term	Definition
Agreements	Provide a mechanism to define and manage internal and external agreements for the contract, these are also known as deliverables.
Contract Document	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
Digital Signatures	Cryptographically-based signature assurance schemes that are tied to users by a digital identity certificate.

Lecture 2: Collaborate on Documents

- To collaborate on documents, navigate to: **Financials / Supply Chain (FSCM) tile > Supply Chain Operations tile > Supplier Contracts Center > Worklist**

← Finance / Supply Chain (FSCM)

Worklist

New Window |

Worklist

Worklist for MD_SC_COLLAB_TEAM_MEMBER_01: MD_SC_COLLAB_TEAM_

Detail View

Worklist Filters

Feed ▾

Worklist Items

From	Date From	Work Item	Worked By Activity	Priority	Link	
MD_SC_CTL_ADMIN_01	09/10/2020	Collaboration Review	Document Maintenance	<input type="text"/>	Set ID: "MDC" Ad Hoc ID: "MOD0000025", 69	Mark Worked
BU_MD_SC_CTL_CONTRACT_ADMIN	09/21/2020	Collaboration Review	Document Maintenance	<input type="text"/>	Set ID: "MDC" Ad Hoc ID: "MRQ0000037", 72	Mark Worked

Refresh

Lecture 2: Collaborate on Documents

[Worklist](#) **Document Management**

Document Management

[Return to Document Search](#)

SetID	MDC	Ad Hoc ID	MOD0000025
Contract Style	Adhoc Document		
Document Type	Mod Recommendation		
Description	TST		
Administrator	MD_SC_CTL_ADMIN_01		
Sponsor	MD_SC_COLLAB_TEAM_MEMBER_01	Department	FN00000000 FINANCE DEPARTMENT
Begin Date	09/09/2020	Expire Date	

Version	0.00	Created On	09/09/20 11:39PM	Document Details
Status	Pending Collaboration	Last Modified On	09/10/20 2:47AM	

This document requires your feedback. Review document, then enter and save comments. When done select Mark as Reviewed.

▼ **Collaboration Comments**

Add Collaboration Comments

Save

Mark as Reviewed

View and Edit Options:

View Document

Edit Document

[Add Attachments/Related Documents](#)
[Document Modification Summary](#)
[Document Version History](#)

Review and Approval:

Other Document Actions:
[Generation Log](#)

View and Edit Options:

View Document

Check In

Cancel Check Out

Check In Document

Select the desired versioning option and enter a brief description describing the changes. Select the OK button to proceed and you will then be prompted to enter the filename.

SetID	MDC	Ad Hoc ID	MOD0000025
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Version ☒ Minor Version (0.01)
☐ Major Version (1.00)

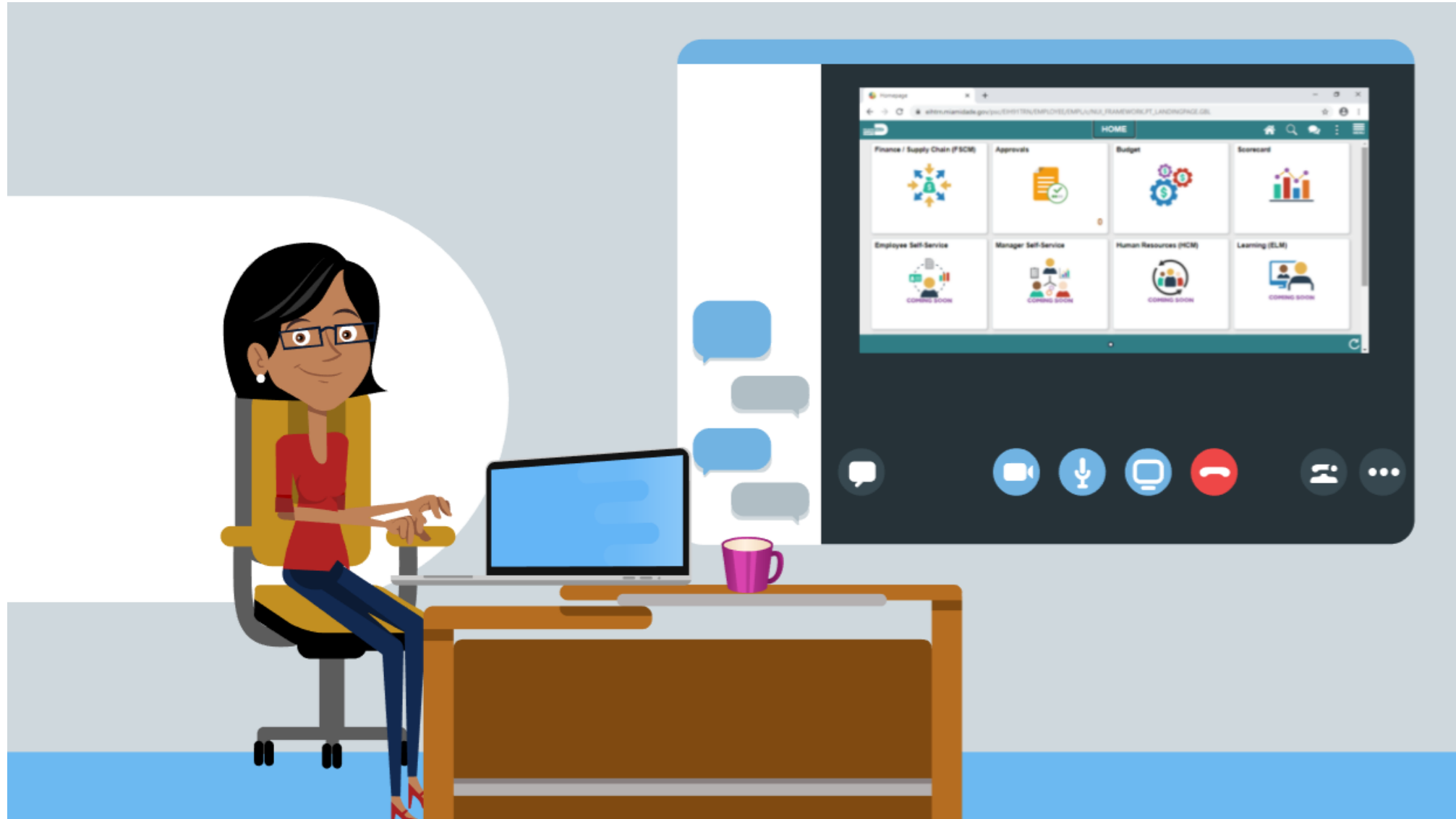
*Comments

237 characters remaining

OK

Cancel

Lesson 2: Activities and Exercises



Lesson 3: Negotiate Supplier Contract Document

Steps for Negotiating a Supplier Contract Document

1. Create Supplier Contract
2. Amend Supplier Contract
3. Make document available for supplier to review
4. Send document to supplier (supplier portal or email)
5. Receive draft contract and review
6. Follow contract acceptance/update process and return to supplier
7. Receive updated draft from supplier

Lesson 3: Negotiate Supplier Contract Document

Steps for Negotiating a Supplier Contract Document

8. Receive updated status, review and incorporate comments, changes, as appropriate
 - If Collaboration is Yes, Go to task number 12
 - If No, Go to task number 9
9. Prepare and route for external/internal signatures before approval, if needed (portal option for supplier)
 - If Action is Refresh reference variables and update new values on document, Go to task number 10
 - If Action is Regenerate document, Go to task number 11
 - If Action is Prepare for signatures, Go to task number 13
 - If Action is Approve Supplier Contract, Go to task number 14
 - If Action is Deactivate document, Go to task number 15

Lesson 3: Negotiate Supplier Contract Document

Steps for Negotiating a Supplier Contract Document

10. Refresh reference variables and update new values on document
11. Regenerate Document
12. Create Supplier Contract
13. Prepare for Signatures
14. Approve Supplier Contracts
15. Deactivate Document

Lesson 3: Key Terms

Term	Definition
Collaboration	An optional function used when creating contract documents to share and track edits to documents across internal and external collaborators.
Collaborators	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.
Contract Document	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.
Digital Signatures	Cryptographically-based signature assurance schemes that are tied to users by a digital identity certificate.

Lesson 3: Activities and Exercises



Lesson 4: Approve Supplier Contract Document

- Submit a contract document for approval
- Approve a contract document

Lecture 1: Submit for Approval

- Once all collaborators and suppliers have reviewed the document as needed, the contract can be submitted for approval
- The document will automatically be routed to the first approver, and then to subsequent approvers as designated in the approval workflow
- The originator and approvers also can add an Ad-hoc approver/reviewer to route the document to individuals who are not in the workflow

Lecture 1: Submit for Approval

- To submit a supplier contract for approval, navigate to: **Finance / Supply Chain (FSCM) tile > Supply Chain Operations > Supplier Contracts Center > Document Management**

The screenshot displays the 'Supplier Contracts Center' interface. On the left is a navigation pane with the following items: 'Create Contracts and Documents' (with a plus icon), 'Contract Entry', 'Document Management' (highlighted in green), 'My Document Preferences', 'Monitor and Update Agreements' (with a minus icon), 'Manage Contract Library' (with a minus icon), and 'Contract Releases Processes' (with a minus icon). The main content area is titled 'Add a Document' and contains several input fields: '*Source Transaction' (a dropdown menu set to 'Ad Hoc'), '*SetID' (a text box with 'MDC' and a search icon), '*Ad Hoc ID' (a text box with 'NEXT'), '*Description' (an empty text box), '*Contract Style' (a dropdown menu), and '*Document Type' (a dropdown menu). At the bottom of the main area are four buttons: 'Add a Document' (green), 'Copy Document' (grey), 'Import Document' (grey), and 'Find an Existing Document' (grey, outlined in red). The top right of the interface includes a header bar with 'Supply Chain Operations' and 'Supplier Contracts Center', and a secondary bar with 'New Window | Help | Personalize Page' and icons for home, search, and menu.

Lecture 1: Submit for Approval

Document Approval Status

SetID MDC

Contract ID 0000000036

Supplier AUTO ELECTRIC SERVICE INC

Review/Edit Approvers

SC ISD Central Procurement

MDC/0000000036:Initiated

Start New Path

ISD Procurement

Not Routed

MD_SC_CTL_ADMIN_02

User Manager

Not Routed

Multiple Approvers

SC Manager

Not Routed

Multiple Approvers

SC Analyst

User Departments

Not Routed

MD_SC_CTL_ADMIN_02

User Manager

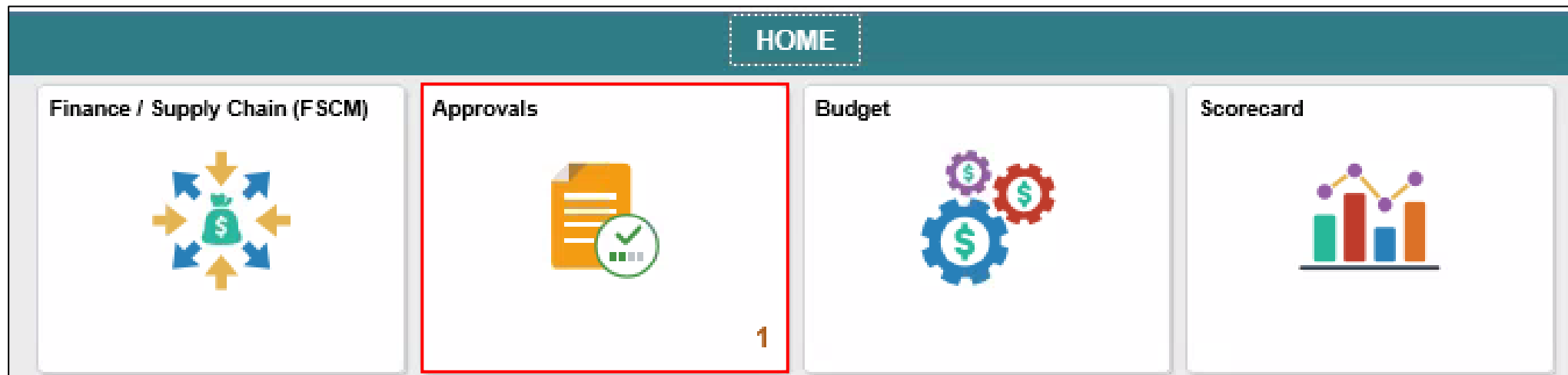
Preview Approval

Submit for Approval

[Return to Document Management](#)

Lecture 2: Approve Contract Document

- To approve a contract document, navigate to: **Approvals**



Lecture 2: Approve Contract Document

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COUNTY

informs

< Supplier Contracts Center

Document Management

Home

Chat

More

MENU

New Window | Help | Personalize Page

Document Management

SetID

MDC

Contract ID

0000000036

[Return to Document Search](#)

Supplier

AUTO ELECTRIC SERVICE INC

Contract Style

Purchase Order

Document Type

Form of Agreement

Description

This is a test simulation

Administrator

Jane Doe

Sponsor

John Smith

Department

ID08000000

STRATEGIC PROCUREMENT (SP)

Version

1.04

Created On

09/21/20 3:34AM

[Document Details](#)

Status

Pending Approval

Last Modified On

09/28/20 11:45PM

This document requires your approval. Review the document as directed, then select Approve or Deny.

Approve

Deny

View and Edit Options:

Review and Approval:

Other Document Actions:

View Document

Add Attachments/Related Documents

[Document Version History](#)

Lecture 2: Approve Contract Document

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informs

Supplier Contracts Center

Document Management

[New Window](#) | [Help](#) | [Personalize Page](#) | [MENU](#)

Document Management

SetID MDC

Contract ID 0000000036

[Return to Document Search](#)

Supplier AUTO ELECTRIC SERVICE INC

Contract Style Purchase Order

Document Type Form of Agreement

Description This is a test simulation

Administrator Jane Doe

Sponsor John Smith

Department ID08000000 STRATEGIC PROCUREMENT (SP)

Version 1.04

Created On 09/21/20 3:34AM

[Document Details](#)

Status Pending Approval

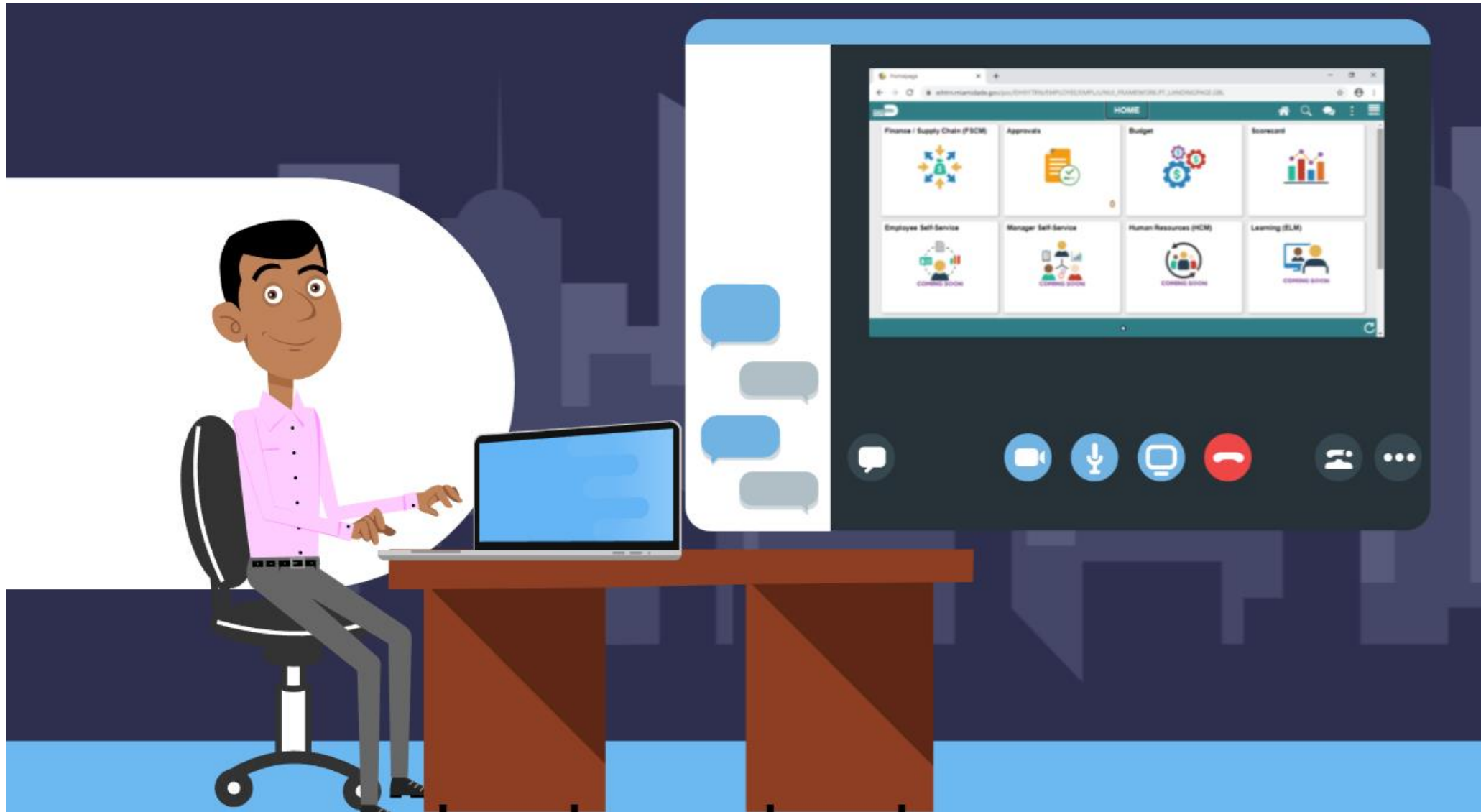
Last Modified On 09/28/20 11:45PM

This document requires your approval. Review the document as directed, then select Approve or Deny.

Approve

Deny

Lesson 4: Activities and Exercises



Lesson 5: Execute Supplier Contract Document

- Dispatch Supplier Contract Document
- Execute Supplier Contract Document

Lesson 5: Key Terms

Term	Definition
Agreements	Provide a mechanism to define and manage internal and external agreements for the contract, these are also known as deliverables.
Contract Document	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.
Digital Signatures	Cryptographically-based signature assurance schemes that are tied to users by a digital identity certificate.

Lecture 1: Dispatch Supplier Contract Document

- After a contract document has been approved the document will be routed to signers for signature
- The contract document must have all signatures to be executed. If signatures are missing, the contract can be routed again.
- After all parties sign the contract, the document is **dispatched** to the suppliers
- After a document is executed, transactions such as Requisitions and Purchase Orders can be processed against the contract
- Once executed, contracts are available for amendment

Lecture 1: Dispatch Supplier Contract Document

- To dispatch a supplier contract, navigate to **Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contract Center > Document Management**

Document Management

SetID	MDC	Contract ID	GRP0000168
Supplier	Group Contract Multiple Supplier		
Contract Style	Request to Qualify		
Document Type	Form of Agreement		
Description	LOTUS SOFTWARE		
Administrator	MD_SC_CTL_CONTRACT_ADMIN		
Sponsor	Department		
Version	0.01	Created On	06/29/20 1:22PM
Status	Approved	Last Modified On	07/06/20 1:54PM
<div>Dispatch</div>			

Lecture 2: Execute Supplier Contract Document

- Navigate to the supplier contract using the steps showed earlier

Version	0.01	Created On	06/29/20 1:22PM
Status	Dispatched	Last Modified On	10/07/20 1:16PM
<div><div>Redispatch</div><div>Execute Contract</div></div>			

Document Management			
SetID	MDC	Contract ID	GRP0000168
Supplier	Group Contract Multiple Supplier		
Contract Style	Request to Qualify		
Document Type	Form of Agreement		
Description	LOTUS SOFTWARE		
Administrator	MD_SC_CTL_CONTRACT_ADMIN		
Sponsor	Department		
<hr/>			
Version	0.01	Created On	06/29/20 1:22PM
Status	Executed	Last Modified On	10/07/20 1:19PM
<div>Reset to Dispatch</div>		Executed On	10/07/20 1:19:12PM
<div>Create Amendment</div>			

Lesson 5: Activities and Exercises



Lesson 6: Amend Supplier Contract Document

- A contract document amendment is an update to an existing executed contract document
- Supplier Contract Management provides three options for processing amendment updates.
- INFORMS generates and manages document processing based on an amendment option. Available Amendment options include the following
 1. Amend Contract Only
 2. Amend Contract with Amendments
 3. Amendment Files Only

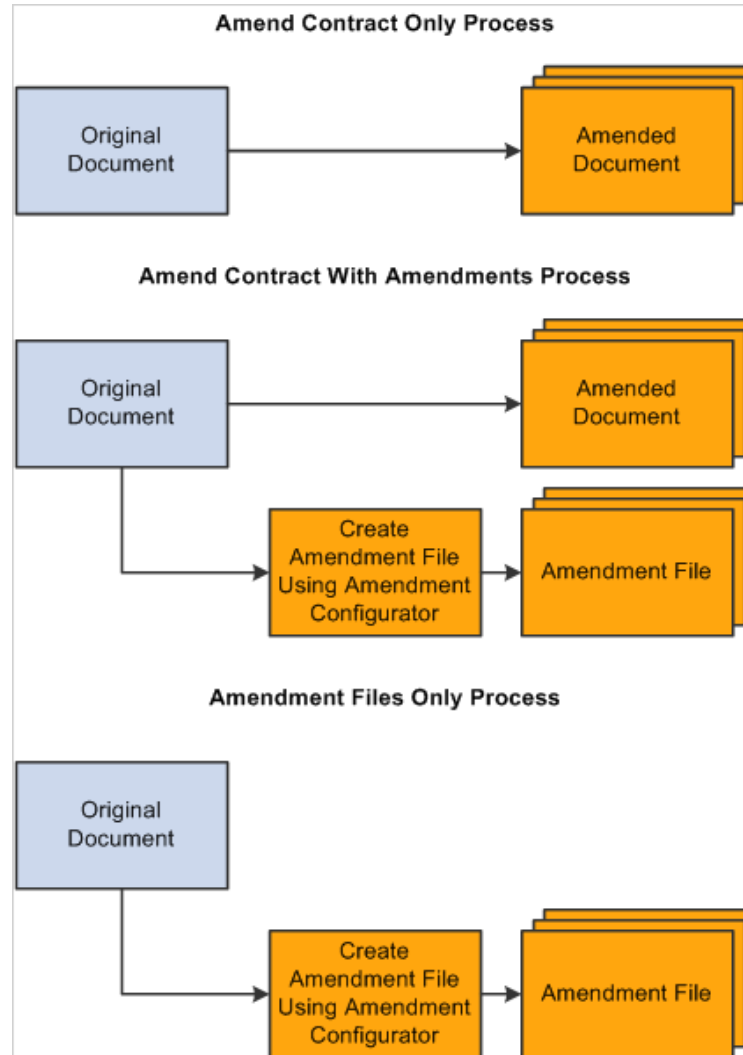
Lesson 6: Amend Supplier Contract Document

- The **Amend Contract only** option supports a single-document process used to make changes to the original document that has been executed.
- The **Amend Contract with Amendments** option supports a two-document process to make changes to both the original executed document and a newly created amendment file.
- The **Amendment Files only** option supports a single-document process used to make changes to a newly created amendment file

Lesson 6: Amend Supplier Contract Document

- After a contract document has been approved the document will be routed to signers for signature
- The contract document must have all signatures to be executed
- After all parties sign the contract, the document is **dispatched** to the suppliers
- After a document is executed, transactions such as Requisitions and Purchase Orders can be processed against the contract
- Once executed, contracts are available for amendment

Lesson 6: Amend Supplier Contract Document



Lesson 6: Key Terms

Term	Definition
Agreements	Provide a mechanism to define and manage internal and external agreements for the contract, these are also known as deliverables.
Contract Document	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.

Lecture 1: Amend Contract Document

- To amend a contract document, navigate to: **Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contract Center > Document Management**

The screenshot displays the 'Supplier Contracts Center' interface. On the left is a navigation sidebar with the following items: 'Create Contracts and Documents', 'Contract Entry' (highlighted), 'Document Management', 'My Document Preferences', 'Monitor and Update Agreements', 'Manage Contract Library', 'Contract Releases Processes', and 'Worklist'. The main content area is titled 'Contract Entry' and includes a sub-header 'Supplier Contracts Center'. Below this, there is a search bar with the text 'Enter any information you have and click Search. Leave fields blank for a list of all values.' and three buttons: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. The 'Find an Existing Value' button is active. Below the search bar is a section titled 'Search Criteria' with a dropdown arrow. This section contains several search fields: 'SetID' (with a dropdown menu), 'MDC' (with a search icon), 'Contract ID' (with a 'begins with' dropdown and a search icon), 'Contract Version' (with a dropdown menu), 'Version Status' (with a dropdown menu), 'Contract Style' (with a 'begins with' dropdown and a search icon), 'Contract Process Option' (with a dropdown menu), 'Group Multi Supplier' (with a dropdown menu), 'Short Supplier Name' (with a 'begins with' dropdown and a search icon), 'Supplier Name' (with a 'begins with' dropdown and a search icon), 'Master Contract ID' (with a 'begins with' dropdown and a search icon), and 'Description' (with a 'begins with' dropdown and a search icon). At the bottom of the search criteria section is a checkbox labeled 'Case Sensitive'. Below the search criteria section are three buttons: 'Search', 'Clear', and 'Basic Search'. To the right of the 'Basic Search' button is a link 'Save Search Criteria'. At the very bottom of the page, there is a footer with the text 'Find an Existing Value | Keyword Search | Add a New Value'.

Lecture 1: Amend Contract Document

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Supplier Contracts Center

informs

Supply Chain Operations

Contract

Contract Details

Additional Details

Insurance Details

Contract Entry

Contract

SetID MDC

Contract ID RTQ-01404

Contract Style Request to Qualify

Process Option Group Multi Supplier

*Status

Approved

Description TRAINED CANINES AND TRAINING

Administrator/Buyer BANDHUJ Bandhu, Janice

Begin Date 01/01/2020

Expire Date 12/31/2024

Authored Document

Authored Status

Document Version 0.00

Amendment 0

Created Date/time

Document Administrator

Version 1

Status Current

Maintain Document

New Version

96

MIAMI-DADE
COUNTY

Lesson 5: Activities and Exercises



Module 4: Document Management Summary

Module Topics

Module Introduction

Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Documents

- Lecture 1: Ad-Hoc Contract
- Lecture 2: Create a Sourcing Event Document
- Lecture 3: Create a Purchasing Contract

Lesson 2: Collaborate on Documents

- Lecture 1: Collaborate on Documents

Lesson 3: Negotiate Supplier Contract Document

Lesson 4: Approve Supplier Contract Document

- Lecture 1: Submit for Approval
- Lecture 2: Approve Contract Document

Lesson 5: Execute Supplier Contract Document

- Lecture 1: Dispatch Supplier Contract
- Lecture 2: Execute Supplier Contract Document

Lesson 6: Amend Supplier Contract Document

- Lecture 1: Amend Contract Document

Module 5: Course Summary

Module Topics

- Course Content Summary
- Additional Training and Job Aids
- Course Summary

Course Content Summary

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

Additional Training and Job Aids

User Productivity Kits (UPKs)

- Approve Supplier Contract Document
- Author a Contract Document
- Create Procurement Contract and Relate to GMS
- Negotiate Supplier Contract Document
- Execute Supplier Contract Document
- Amend Supplier Contract Document
- Manage Supplier Contract Standard

For additional information, be sure to visit:

- Miamiidade.gov/informs



CONGRATULATIONS

Congratulations on successfully completing the *Department Supplier Contract Management* course!

SCM 205 – Department Supplier Contract Management