

## Maintain Contract Purchase Agreements Including Change Orders

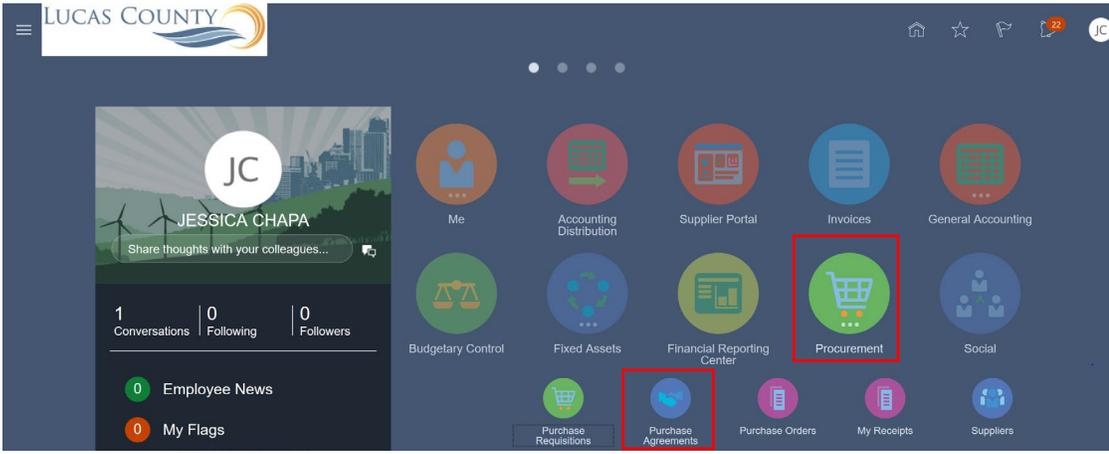
**Audience:** Procurement Agent, Catalog Administrator, Supplier

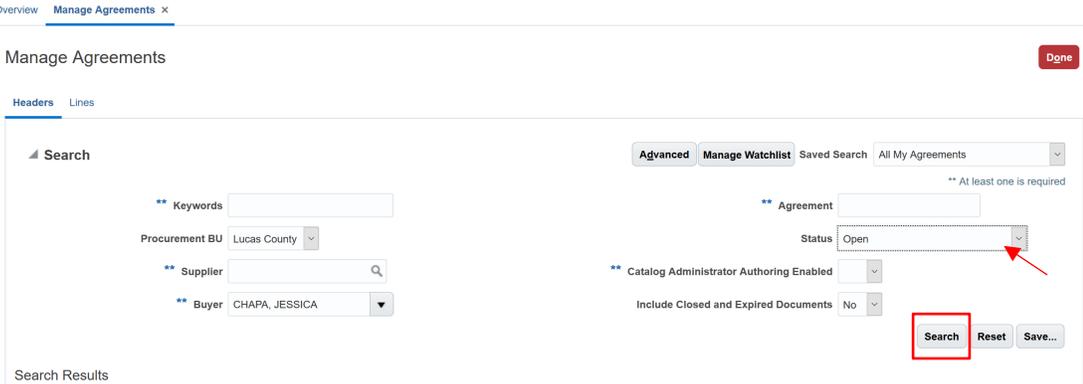
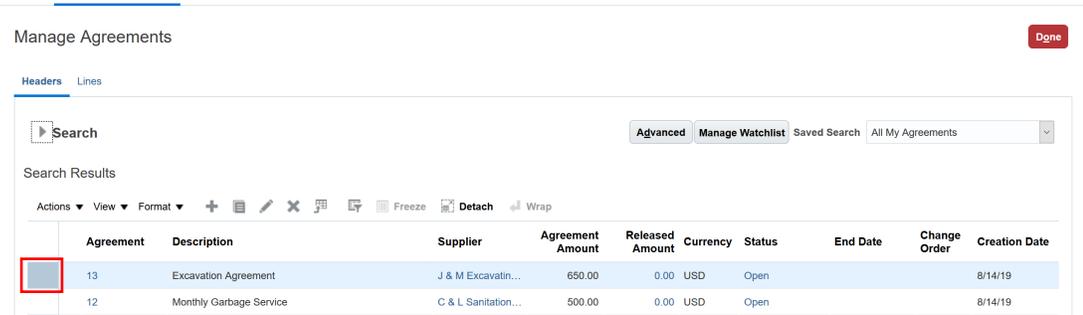
**Purpose:** Managing the supplier agreement life cycle enables all key stakeholders of the supplier agreement; the procurement agent, the catalog administrator, and the supplier to track and monitor the execution cycle of the agreement and initiate and manage changes to the agreement including cancellations.

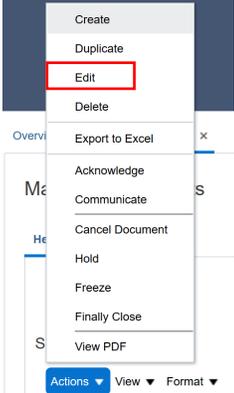
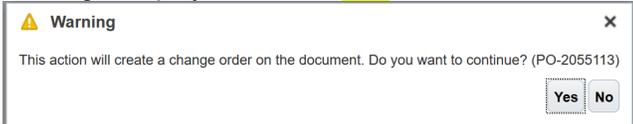
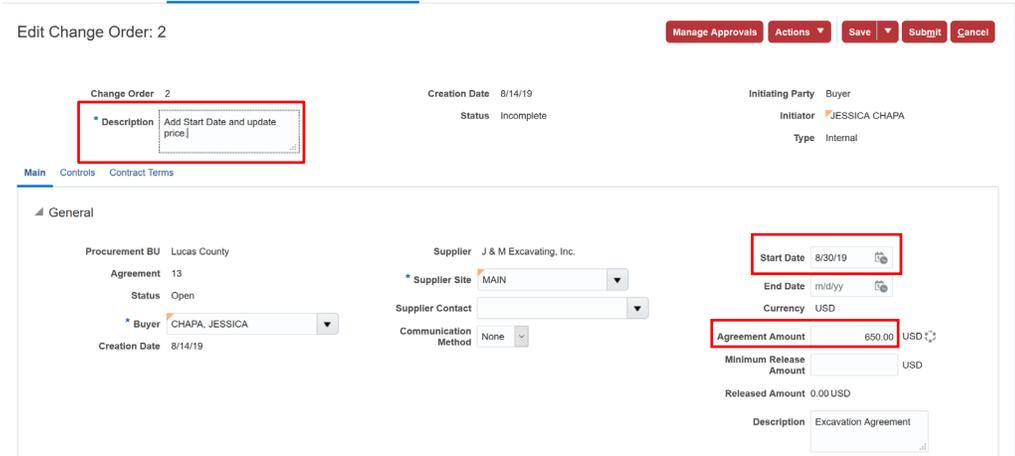
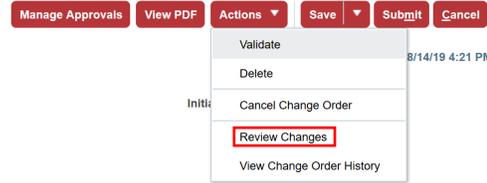
Supplier Agreement Life Cycle Tasks include:

- Open agreement for release once approved and accepted
- Track agreement execution status
- Reassign agreement ownership from one agent to another
- Control downstream activities
- Control amendment activities
- Notify agent when agreement nears expiration
- Finally close the document

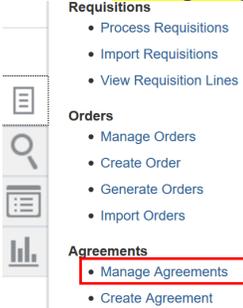
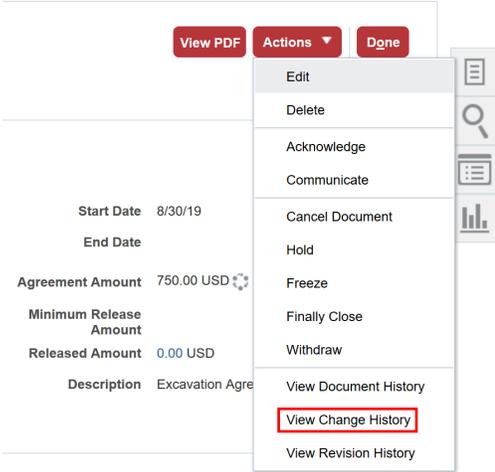
This job aid provides steps to maintain contract purchase agreements, including change orders.

Step	Action
1	<p>Log into Oracle  <b>Home page -&gt; Procurement.</b></p> 
2	Click the <b>Purchase Agreements</b> icon.
3	Click on the <b>Tasks</b> icon.

																															
4	<p>Click the <b>Manage Agreements</b> link.</p> <ul style="list-style-type: none"> <li>Requisitions             <ul style="list-style-type: none"> <li>Process Requisitions</li> <li>Import Requisitions</li> <li>View Requisition Lines</li> </ul> </li> <li>Orders             <ul style="list-style-type: none"> <li>Manage Orders</li> <li>Create Order</li> <li>Generate Orders</li> <li>Import Orders</li> </ul> </li> <li>Agreements             <ul style="list-style-type: none"> <li><b>Manage Agreements</b></li> <li>Create Agreement</li> </ul> </li> </ul>																														
5	<p>Click the <b>Status</b> list drop-down.</p>																														
6	<p>Click the <b>Open</b> status to select it.</p> 																														
7	<p>Click the <b>Search</b> button.</p>																														
8	<p>Highlight the row of the <b>Contract Purchase Agreement</b> to be edited.</p>  <table border="1"> <thead> <tr> <th>Agreement</th> <th>Description</th> <th>Supplier</th> <th>Agreement Amount</th> <th>Released Amount</th> <th>Currency</th> <th>Status</th> <th>End Date</th> <th>Change Order</th> <th>Creation Date</th> </tr> </thead> <tbody> <tr> <td>13</td> <td>Excavation Agreement</td> <td>J &amp; M Excavatin...</td> <td>650.00</td> <td>0.00</td> <td>USD</td> <td>Open</td> <td></td> <td></td> <td>8/14/19</td> </tr> <tr> <td>12</td> <td>Monthly Garbage Service</td> <td>C &amp; L Sanitation...</td> <td>500.00</td> <td>0.00</td> <td>USD</td> <td>Open</td> <td></td> <td></td> <td>8/14/19</td> </tr> </tbody> </table>	Agreement	Description	Supplier	Agreement Amount	Released Amount	Currency	Status	End Date	Change Order	Creation Date	13	Excavation Agreement	J & M Excavatin...	650.00	0.00	USD	Open			8/14/19	12	Monthly Garbage Service	C & L Sanitation...	500.00	0.00	USD	Open			8/14/19
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9	<p>Click the <b>Actions</b> menu.</p>																														
10	<p>Click the <b>Edit</b> menu.</p>																														

	
11	<p>Message Displays. Click the <b>Yes</b> button to continue.</p> 
12	<p>Click in the <b>Description Field</b>. This field is mandatory for the Change Order. Enter a description to indicate reason for change. For example, 'Add Start Date and update price'.</p> 
13	<p>Click in the <b>Start Date</b> field and select a date equal to or greater than today's date.</p>
14	<p>Click in the <b>Agreement Amount</b> field, and change the Agreement amount.</p>
15	<p>Click the <b>Save</b> button.</p>
16	<p>Click the <b>Actions</b> menu drop-down icon.</p>
17	<p>Click the <b>Validate</b> menu item.</p>
18	<p>Click the <b>OK</b> button.</p>
19	<p>Click the <b>Actions</b> menu.</p>
20	<p>Click <b>Review Changes</b> on the menu.</p> 
20	<p>Review the changes and click the <b>Done</b> button.</p>



23	<p>Navigate back to the <b>Mange Agreements</b> link. Click the <b>Manage Agreements</b> link.</p> 																														
	<p>Click <b>Search</b>.</p>																														
24	<p>Highlight the same <b>Contract Purchase Agreement</b> row. Notice the updated <b>Amount Limit</b>.</p>  <table border="1"> <thead> <tr> <th>Agreement</th> <th>Description</th> <th>Supplier</th> <th>Agreement Amount</th> <th>Released Amount</th> <th>Currency</th> <th>Status</th> <th>End Date</th> <th>Change Order</th> <th>Creation Date</th> </tr> </thead> <tbody> <tr> <td>13</td> <td>Excavation Agreement</td> <td>J &amp; M Excavatin...</td> <td>750.00</td> <td>0.00</td> <td>USD</td> <td>Open</td> <td></td> <td></td> <td>8/14/19</td> </tr> <tr> <td>12</td> <td>Monthly Garbage Service</td> <td>C &amp; L Sanitation...</td> <td>500.00</td> <td>0.00</td> <td>USD</td> <td>Open</td> <td></td> <td></td> <td>8/14/19</td> </tr> </tbody> </table>	Agreement	Description	Supplier	Agreement Amount	Released Amount	Currency	Status	End Date	Change Order	Creation Date	13	Excavation Agreement	J & M Excavatin...	750.00	0.00	USD	Open			8/14/19	12	Monthly Garbage Service	C & L Sanitation...	500.00	0.00	USD	Open			8/14/19
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25	<p>Click on the <b>Agreement number</b> that was updated.</p>																														
26	<p>Click the <b>Actions</b> menu.</p>																														
27	<p>Click the <b>View Change History</b> menu.</p> 																														
28	<p>Click the <b>Description</b> link.</p>																														

Overview Manage Agreements x Contract Purchase Agreement: 13 x **Contract Purchase Agreement: 13 x**

Change History: 13 Done

Currency = US Dollar

Actions View Format Freeze Detach Wrap

Change Order	Description	Resulting Revision	Creation Date	Initiating Party	Initiator	Type	Agreement Amount Changed	Status
2	Add Start Date and update price.	1	8/14/19	Buyer	JESSICA CHAPA	External	+100.00	Processed
1	Added Description		8/14/19	Buyer	JESSICA CHAPA	Internal	0.00	Processed

29 Review the details of the Change Order. Click the **Done** button.

Review Changes: 2 Done

Currency = US Dollar

Change Order 2 Creation Date 8/14/19 Initiating Party Buyer

Description Add Start Date and update price. Status Processed Initiator JESSICA CHAPA

Type External

Main Controls Contract Terms

General

View Format Freeze Detach Wrap

Attribute	Changed From	Changed To
Amount Limit (USD)	650.00	750.00
Start Date		8/30/19
Agreement Amount (USD)	650.00	750.00

30 Click the **Status** link to view the status of the Change Order.

Change Order History: 2 Done

Buyer JESSICA CHAPA Supplier J & M Excavating, Inc.

Procurement BU Lucas County Supplier Site MAIN

Agreement 13 Status Processed

Description Add Start Date and update price.

View Format Freeze Detach Wrap

Action	Performed By		Action Date	Additional Information
	Party	Name		
Submit	Buyer	JESSICA CHAPA	8/14/19 4:23 PM	
Approve	Approver	JESSICA CHAPA	8/14/19 4:30 PM	
Implement Revision 1	Application		8/14/19 4:30 PM	Add Start Date and update price.

31 Click the **Done** button.

32 Highlight the **Change Order** row.

33 Click the **Actions** menu.

34 Click the **Compare to Original** menu.

Change History: 13 Done

Currency = US Dollar

Actions View Format Freeze Detach Wrap

- Export to Excel
- Review Changes
- View PDF
- View Change Order History
- Compare to Original**

Change Order	Description	Resulting Revision	Creation Date	Initiating Party	Initiator	Type	Agreement Amount Changed	Status
2	Add Start Date and update price.	1	8/14/19	Buyer	JESSICA CHAPA	External	+100.00	Processed
1	Added Description		8/14/19	Buyer	JESSICA CHAPA	Internal	0.00	Processed

35 Compare the Changes made.

36	Click the <b>Done</b> button.
37	Click the <b>Done</b> button.
38	Click the <b>Actions</b> menu.
39	<p>Click the <b>View Revision History</b> menu.</p>
40	Notice that the <b>Revision</b> is not the same as the Change Order.
41	Click the <b>Done</b> button.
42	Click the <b>Actions</b> menu.
43	<p>Click the <b>View Document History</b> menu.</p>
44	Click the <b>Expand</b> icon to view the <b>Approval Details</b> . Drill down to the details.
45	Review the document history.
46	Click the <b>Done</b> button.
47	Click the <b>Done</b> button.
48	Click the <b>Home</b> icon.