Revised 10/15/2019

PURPOSE

The purpose of this quick reference guide is to illustrate the steps in the Advantage system for creating a service contract (CT) document.

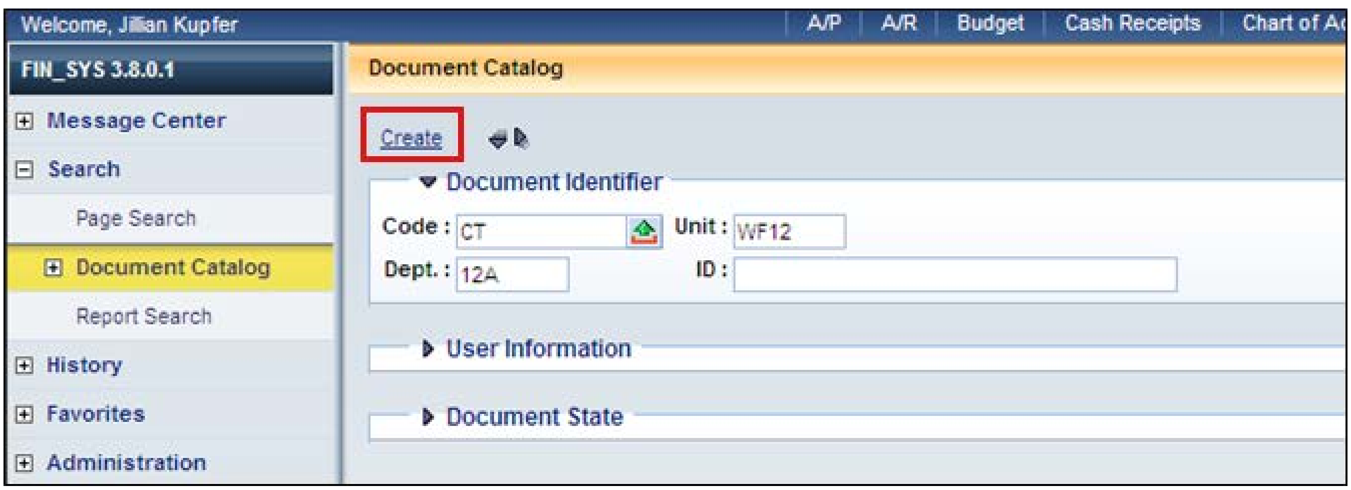
There are two types of CT documents:

- Low Value Service Contract (LVSC)
- Service Contract (SC)

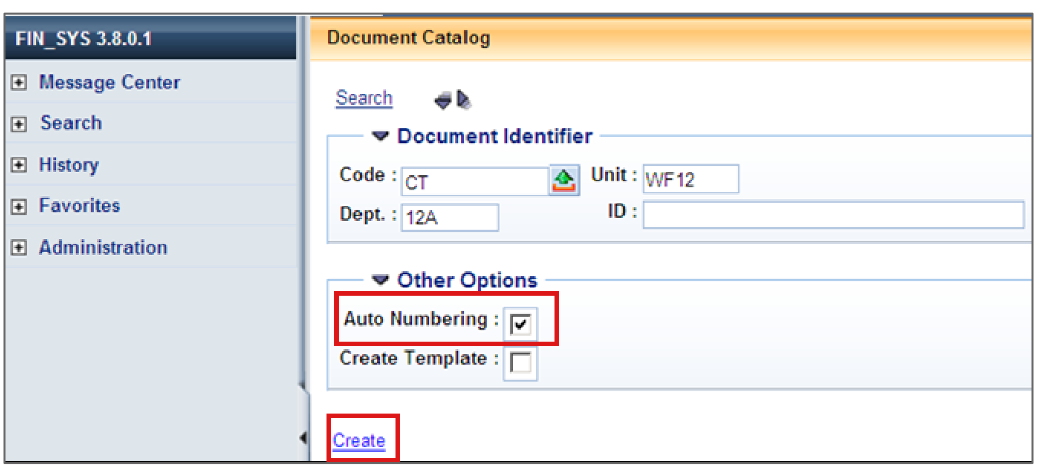
In the Advantage system, the only thing that differentiates the two documents is the **Procurement Type** selected on the Header of the CT document (see step 5 below). All other steps are identical for both documents.

STEPS FOR CREATING A SERVICE CONTRACT (LVSC OR SC)

1. Log into Advantage and navigate to **Document Catalog**.
2. Enter **CT** in the Code field, the **Agency number** in the **Dept.** field, and the **Unit code** in the **Unit** field. (The **ID** field should ALWAYS remain blank.) Then select **Create**.

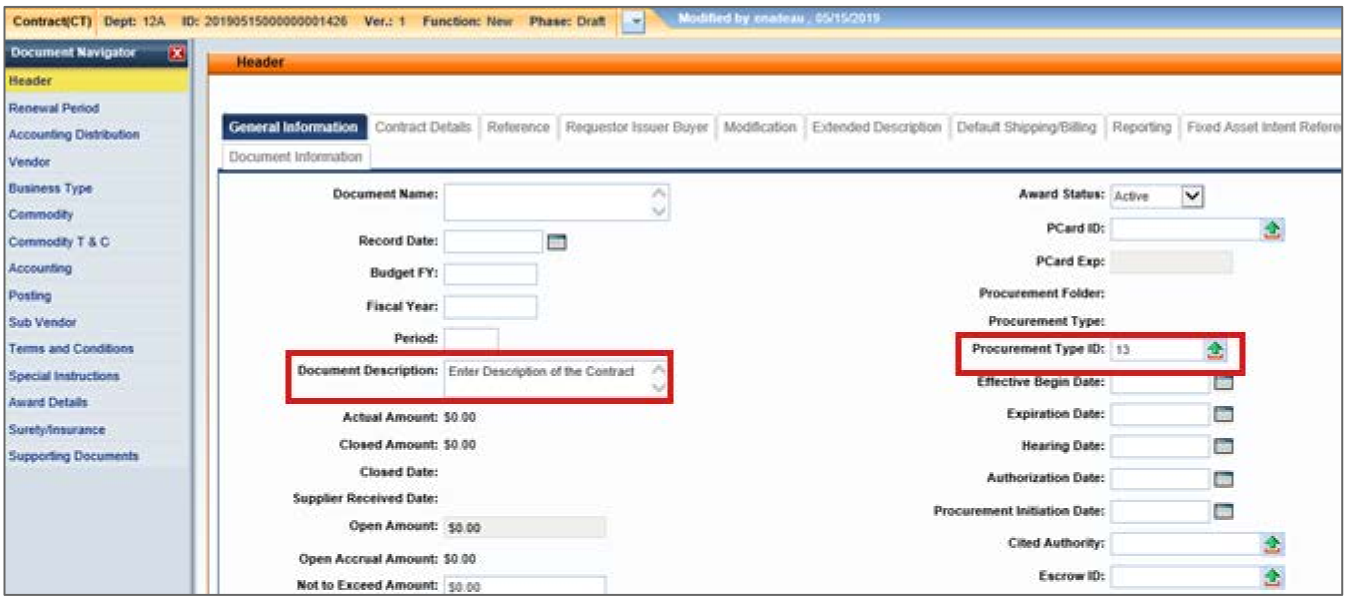


3. Check the **Auto Numbering** box. Select **Create.**

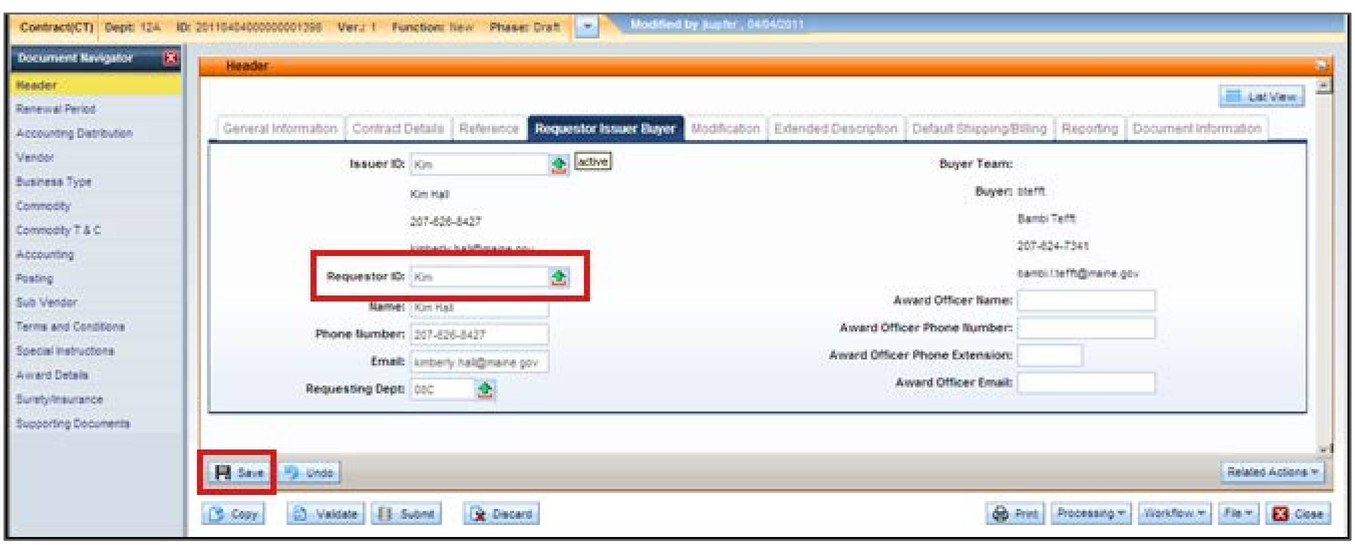


4. A new contract (CT) document opens. Note the unique ID number next to the Dept number at the top of the page. You will use this number on the contract document and supporting document.

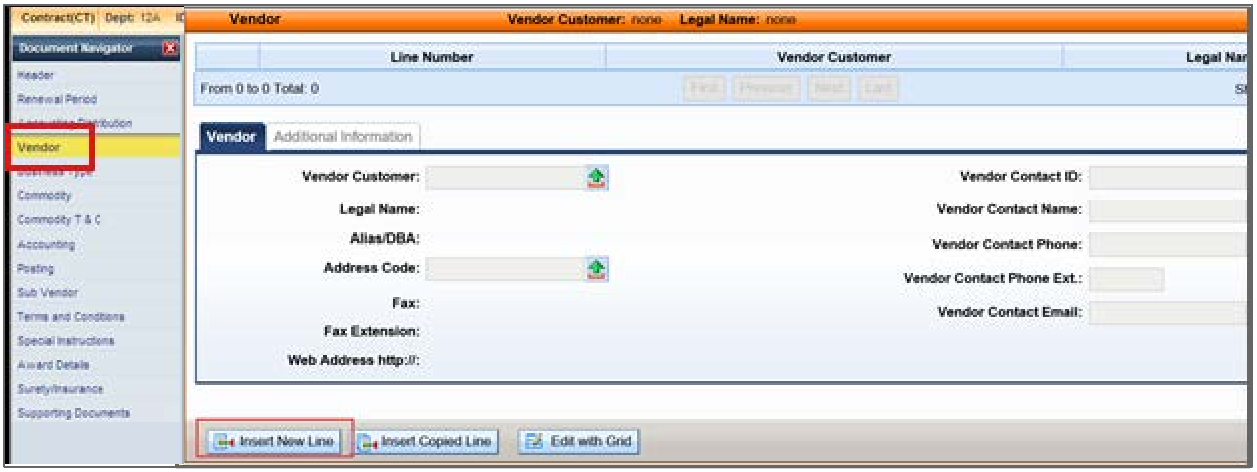
5. Enter the following information on the **Header:**
   - **Document Description** – Enter a brief description of the contract.
   - **Procurement Type ID** – Click the picklist and choose the appropriate selection (SC, LVSC, or Cooperative Agreement); this is a required field.



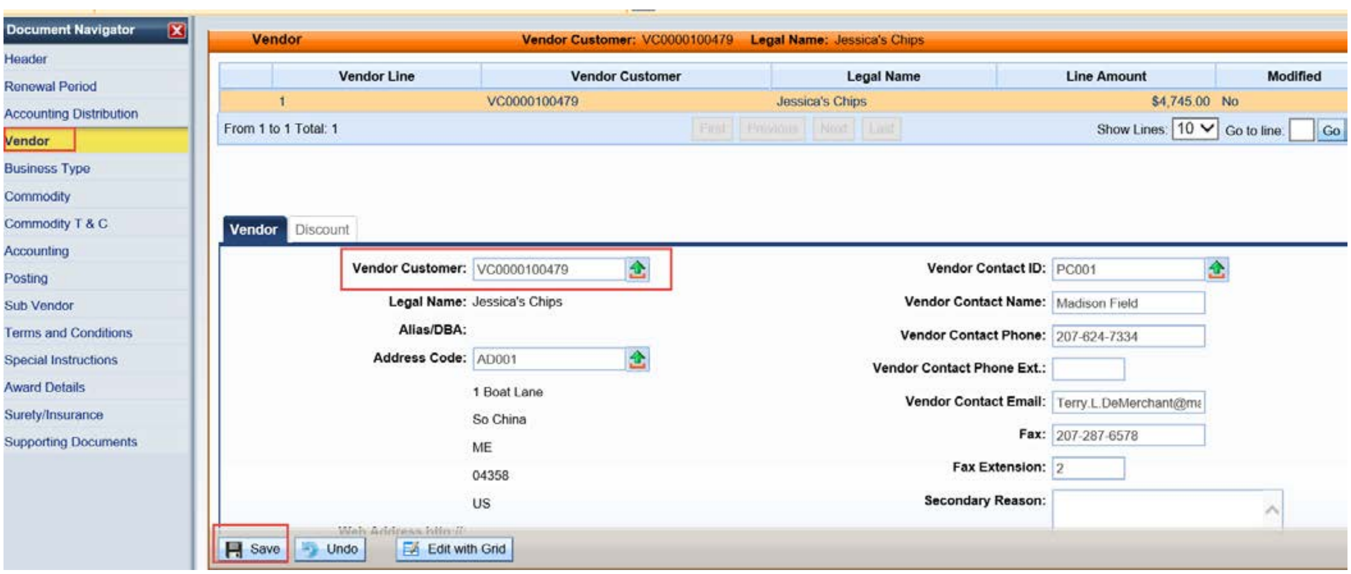
6. Navigate to the **Requestor Issuer Buyer** tab of the Header and select a **Requestor ID** from the picklist. Then click **Save.**



7. Click on **Vendor** from the Document Navigator menu on the left of the screen; then click **Insert New Line**.

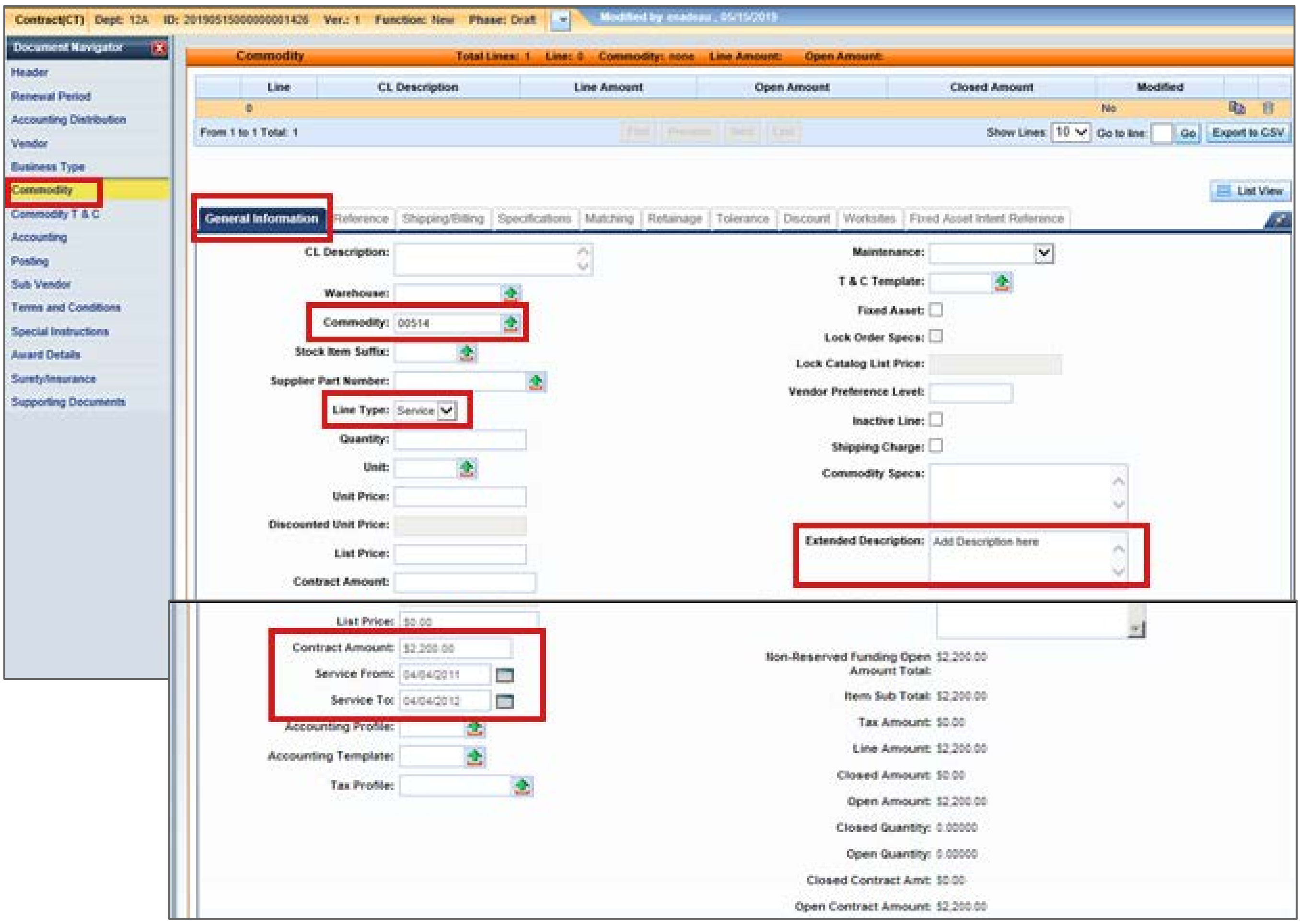


8. In the **Vendor Customer** field, enter the vendor customer number (which must start with a “V”) or click on the picklist to search for your vendor; then select **Save**. This will bring in all the relevant vendor information.

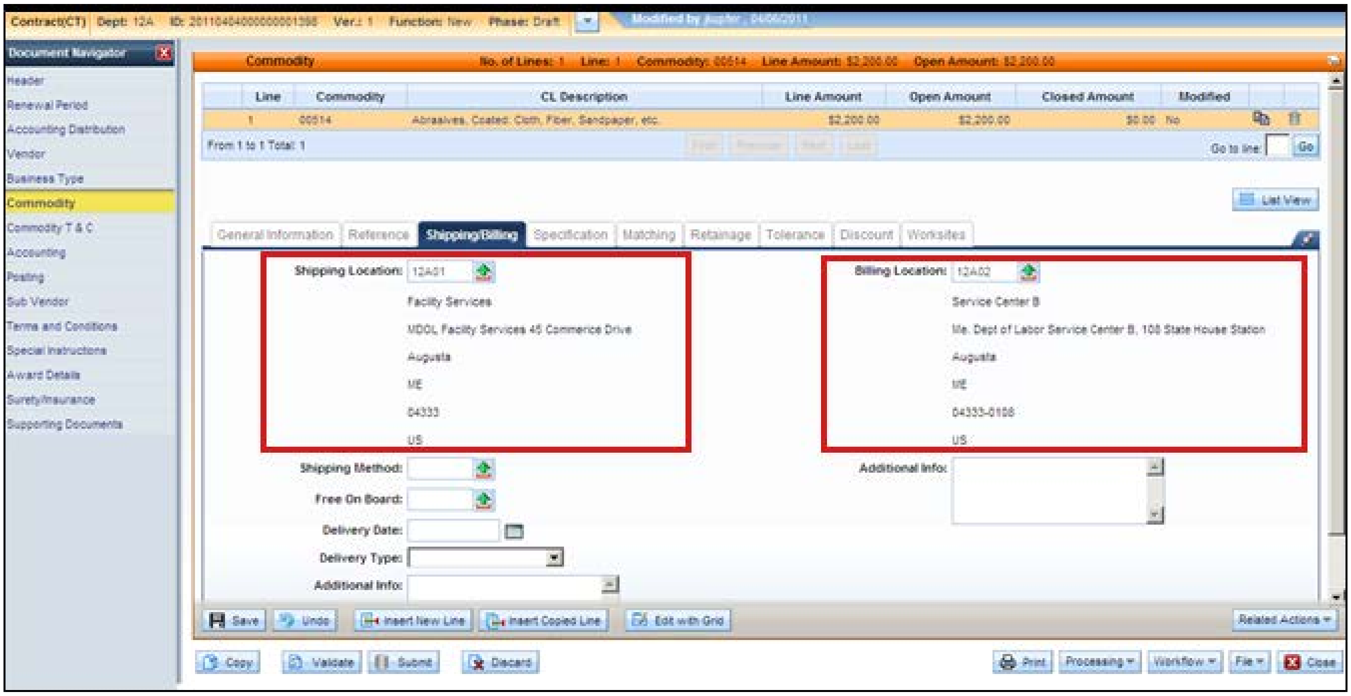


9. Click on **Commodity** from the Document Navigator menu on the left of the screen; then click **Insert New Line**. NOTE: “Commodity” as used in Advantage includes what we have traditionally thought of as services.

10. On the screen that opens, follow these steps:
    a. Enter the **Commodity Code** (e.g., Consultation). The five-digit NIGP codes for services all start with the number 9.
    b. Enter an **Extended Description** of the service to be performed (i.e., Scope).
    c. Set **Line Type** to **Service**.
    d. Enter the **Contract Amount**.
    e. Enter the **Service From** and **Service To** dates.

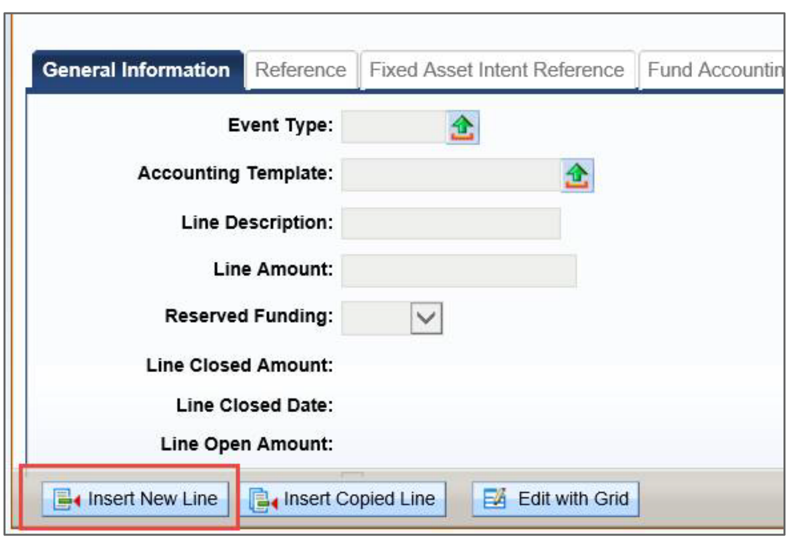


11. Click the **Shipping/Billing** tab and enter the **Shipping Location** and **Billing Location**.



12. Click **Accounting** section from the Document Navigator on the left-hand menu.

13. Click **Insert New Line.**

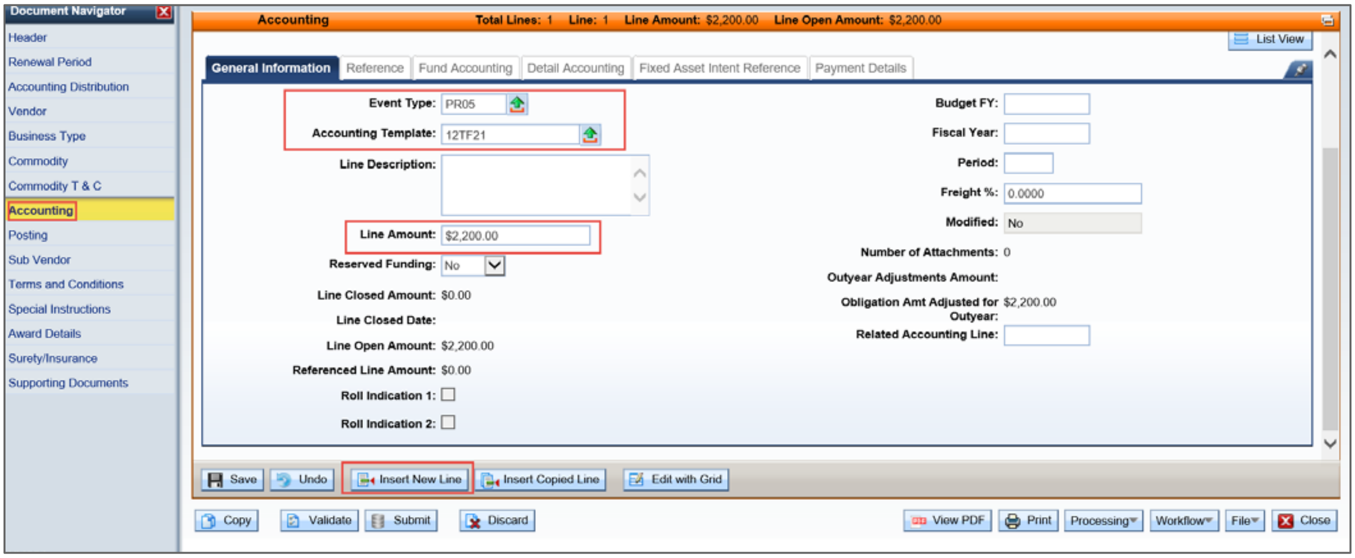


14. Enter the following information:

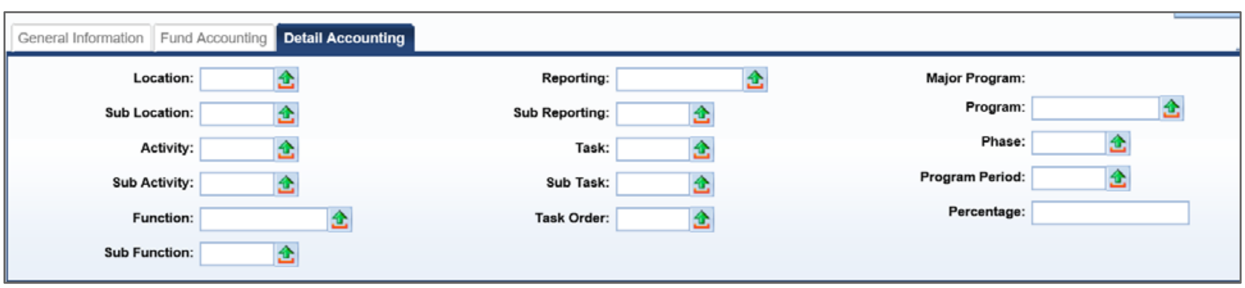
    a. **Event Type** – Enter **PR05.** (If the controller's office has pre-approved your using PR07, you can enter PR07 for non-accounting.)

    b. **Accounting Template** (or complete the chart of account elements in the Fund Accounting section).

    c. **Line Amount** (i.e., contract amount).



15. Optional: If you have detailed accounting that you want to use, you can enter it on the **Detail Accounting** tab.



16. Save, validate and check for errors; then click **Submit.**

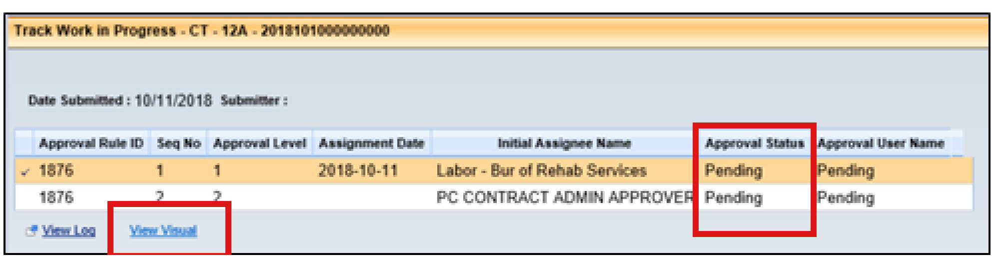
17. After the CT is submitted in Advantage, it will show as **Pending**. You will then need to monitor the status until it is approved by your agency, so you can submit it through PurchasingME.

CHECKING APPROVAL STATUS

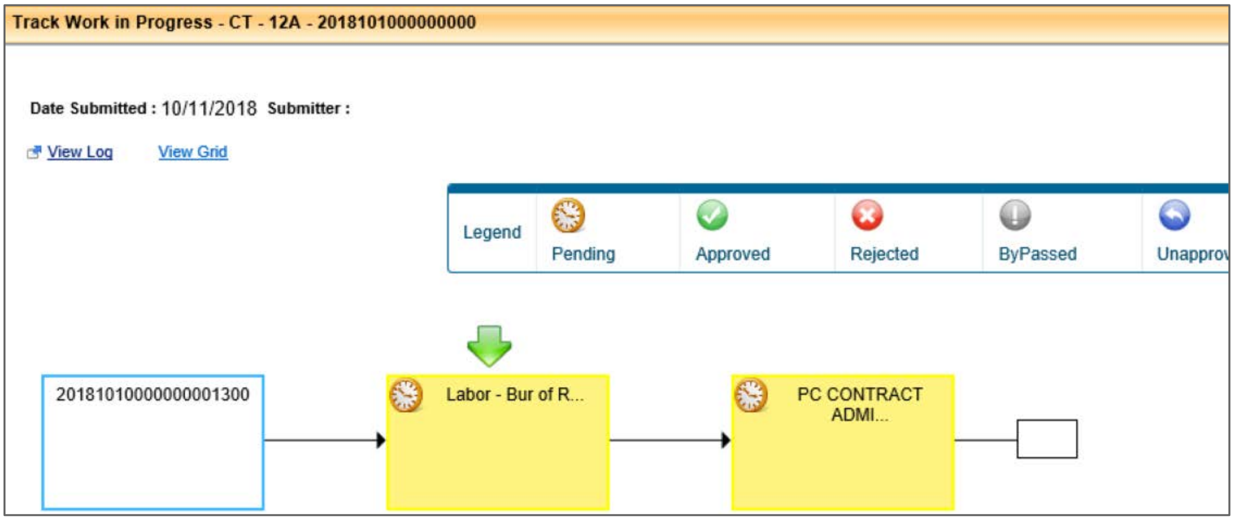
18. If you do not have your procurement folder ID, you can go to the **Document Catalog**, **User Information** to enter your user ID. This pulls up a list of all your documents. Locate your document and click on the **Contract Number** link to bring up your contract.

    To track approvals, click **Workflow**. Then select **Track Work in Progress.**

19. The Approval Status will be displayed, as shown below. If you want to see the Work in Progress in a different format, select **View Visual**.



Visual View



20. Once the CT is approved by your agency approver, you must submit it in PurchasingME.

NOTES ABOUT APPROVAL PROCESS

DHHS contracts may require additional levels of approval depending on the dollar amount.

Division of Procurement Services approval:

- If there are errors, the buyer will use Reject All to send the CT back to you. You will need to correct the errors and re-submit the CT.
- If there are no errors, the Division of Procurement Services' approval finalizes the document and establishes the encumbrance (if encumbering). Procurement Services will also finalize the case in PurchasingME.

ADDITIONAL RESOURCES

- Advantage 303 Procurement Commodities Training Guide

***Questions?** Contact Terry Demerchant in the Division of Procurement Services.*