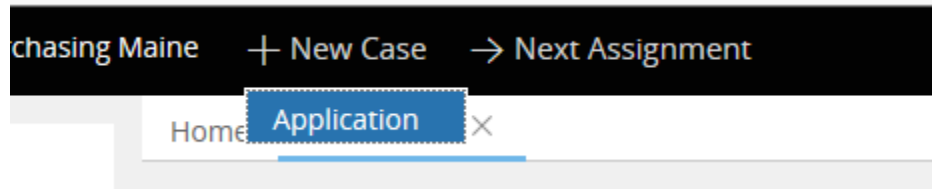


HOW TO DO A CONTRACT DOCUMENT

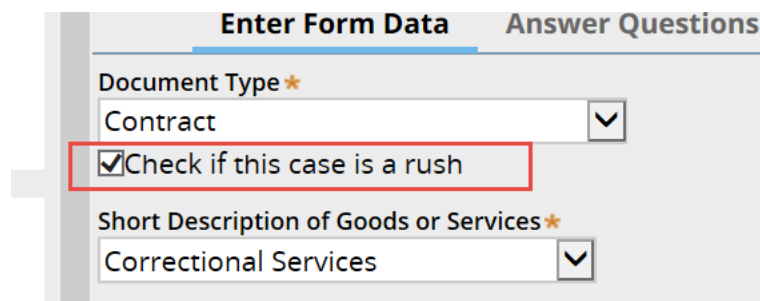
- 1) LOG INTO THE PURCHASING ME APPLICATION
- 2) CLICK ON NEW CASE AND THEN APPLICATION



YOU WILL SEE THAT A CASE NUMBER IS ESTABLISHED FOR YOUR DOCUMENT; IN THIS CASE IT IS PM-1895. YOUR CASE NUMBER WILL BE LOCATED NEXT TO “PURCHASING MAINE” IN THE UPPER LEFT HAND CORNER OF YOUR CASE.



- 3) FILL OUT THE FOLLOWING FIELDS:
 - a. Document Type (Choose “ Contract”)
 - b. Department (select your department by putting in either your agency number or department name.)
 - c. If applicable you can check the “Check if this case is a rush” button



- d. Short Description of Goods or Services (use drop down to select your service)

POINT OF INFORMATION - WHEN PICKING YOUR SERVICE, IF YOU DO NOT SEE ANY SERVICE LISTED THAT WOULD APPLY TO THE SERVICE YOU ARE OBTAINING, THEN SELECT “Other” AND DIRECTLY ACROSS, A FIELD WILL APPEAR WHERE YOU CAN ENTER IN THE SERVICE.

- e. Contractor Name (enter in your vendor name)
- f. Select your Contract Start Date and Contract End Date by using the drop down feature or by using the date icon.

- g. Advantage CT or RQS Number (enter in the Advantage number associated with the contract) **Please put the entire number in this field – you can copy the Advantage number by highlighting it using (ctrl C) and paste into the Purchasing ME case field by using (ctrl V). Sample 20161005000000001221**
- h. Internal Department Contract Number (optional only if applicable to your agency)
- i. Under “What is the dollar amount of the contract?” (enter in the amount of the contract)

NOW CLICK THE “Next” BUTTON

Purchasing Maine (PM-1895) Save draft Other actions

Enter Form Data Answer Questions Upload Documents

Document Type *
Contract

Department *
13A-Department of Marine Resources

Short Description of Goods or Services *
Marine Resource Services

Contractor Name *
Marine Specialists

Contract Start Date *
Mar 17 2017

Contract End Date *
Mar 16 2018

Advantage CT or RQS Number *
20161005000000001221

Internal Department Contract Number

What is the dollar amount of the contract? If this is an amendment, enter only the amendment amount. *
\$11,000.00

4) THE NEXT PAGE WILL ASK VARIOUS QUESTION DEPENDING ON WHAT YOU SELECT

- I. The first question will ask “Is this contract for a temporary staffing position?”

Is this contract for a temporary staffing position? *

Yes

No

If you select YES – the forms you must use will be displayed

Is this contract for a temporary staffing position? *

Yes

No

You must use contract form [BP54](#).

You must also submit a [BP37TEMP](#) form.

If you select NO, then two additional questions will appear

Enter Form Data **Answer Questions** Upload Documents

Is this contract for a temporary staffing position? *

Yes

No

Is this contract related to information technology services or infrastructure? *

Yes

No

Is this contract the result of a competitive process (including the exercising of optional/renewal years)? *

Yes

No

II. For the next question “Is this contract related to information technology services or infrastructure?” If you select YES – the forms you must use will be displayed

Enter Form Data **Answer Questions** Upload Documents

Is this contract for a temporary staffing position? *

Yes

No

Is this contract related to information technology services or infrastructure? *

Yes

No

You must use the [BP54-IT](#) contract template and coordinate with the State’s Office of Information Technology.

If you select NO – the forms you must use will be displayed

Enter Form Data **Answer Questions** Upload Documents

Is this contract for a temporary staffing position? *

Yes

No

Is this contract related to information technology services or infrastructure? *

Yes

No

You must use contract form [BP54](#).

- III. For the next question “Is this contract the result of a competitive process (including the exercising of optional/renewal years)?” if you select NO – the forms you must use will be displayed

Enter Form Data **Answer Questions** Upload Documents

Is this contract for a temporary staffing position? *

Yes

No

Is this contract related to information technology services or infrastructure? *

Yes

No

You must use contract form [BP54](#).

Is this contract the result of a competitive process (including the exercising of optional/renewal years)? *

Yes

No

You must also submit a [BP37WCB](#) form.

If you select YES – an additional question will appear “Is this competitively awarded contract the result of a multi-state cooperative contract?” If you select NO, the forms you must use will be displayed

Enter Form Data Answer Questions Upload Documents

Is this contract for a temporary staffing position? *

Yes
 No

Is this contract related to information technology services or infrastructure? *

Yes
 No

You must use contract form [BP54](#).

Is this contract the result of a competitive process (including the exercising of optional/renewal years)? *

Yes
 No

Is this competitively awarded contract the result of a multi-state cooperative contract? *

Yes
 No

You must also submit a [BP37CA](#) form.

If you had selected YES, the forms you must use will be displayed

Is this contract for a temporary staffing position? *

Yes
 No

Is this contract related to information technology services or infrastructure? *

Yes
 No

You must use contract form [BP54](#).

Is this contract the result of a competitive process (including the exercising of optional/renewal years)? *

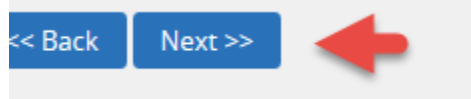
Yes
 No

Is this competitively awarded contract the result of a multi-state cooperative contract? *

Yes
 No

You must also submit a [BP37PA](#) form.

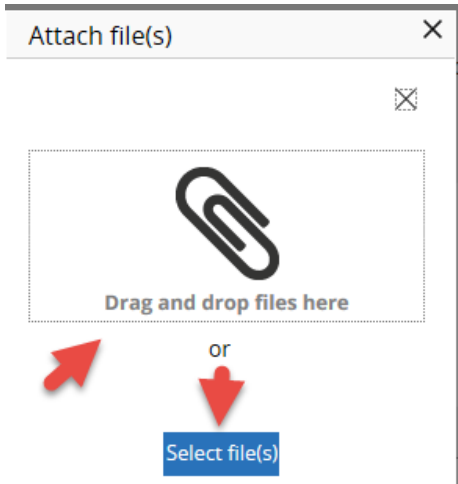
5) AFTER YOU HAVE ANSWERED ALL QUESTIONS YOU CAN PROCEED TO CLICK “Next”



BASED ON THE QUESTIONS THAT WERE ANSWERED ABOVE – THE NEXT PAGE WILL INDICATE WHAT FORMS NEED TO BE ATTACHED. CLICK ON ATTACHMENT/ATTACH FILE TO ATTACH THE DOCUMENTS. **NOTE: Please keep the file names of attachments to less than 64 characters AND with no special characters**

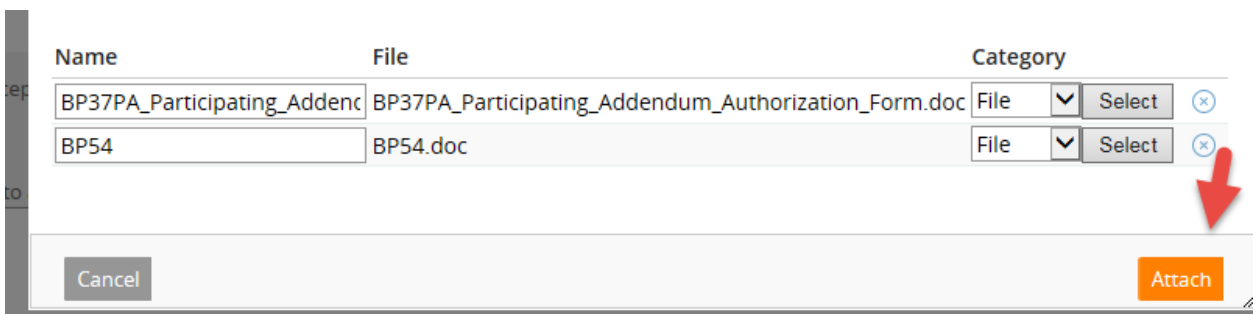
A screenshot of a web form interface. At the top, there are three tabs: 'Enter Form Data', 'Answer Questions', and 'Upload Documents', with the latter being selected. Below the tabs, there is a bold instruction: 'Before uploading any documents, ensure that you have all necessary signatures for each document.' This is followed by a sub-heading: 'You are required to submit the following documents:'. Two lines of text follow: 'You must also submit a BP37PA form.' and 'You must use contract form BP54.', with 'BP37PA' and 'BP54.' highlighted in red boxes. Below this is an 'Attachments' section with a large upward-pointing arrow icon. Underneath the icon is a '+ Attach new' link, which has opened a dropdown menu with 'File from device' selected. A red arrow points to this menu item. Below the dropdown, there is a question: 'Do you have exceptions to the State of Maine standard contract terms and conditions? *' with radio button options for 'Yes' and 'No'.

6) YOU CAN CHOOSE TO EITHER DRAG AND DROP YOUR FILE OR TO CLICK ON “Select File(s)”



FOR THIS EXERCISE I'M GOING TO CLICK ON "Select File(s)" WHICH YOU WOULD THEN FIND AND SELECT YOUR DOCUMENTS AND ATTACH

NAME	Date modified	Type	Size
AWARD NOTIFICATION LETTERS.docx	11/1/2016 3:35 PM	Microsoft Word D...	13 KB
BP18.doc	10/27/2015 2:07 PM	Microsoft Word 9...	174 KB
BP37AM.doc	9/25/2015 9:37 AM	Microsoft Word 9...	46 KB
BP37CA_Competitive_Award_Authorizati...	11/17/2015 9:05 AM	Microsoft Word 9...	57 KB
BP37PA_Participating_Addendum_Autho...	2/26/2016 11:10 AM	Microsoft Word 9...	50 KB
BP37TEMP.doc	10/8/2015 3:12 PM	Microsoft Word 9...	86 KB
BP37WCB.doc	7/13/2016 1:30 PM	Microsoft Word 9...	81 KB
BP37WCB_FAQ.docx	9/20/2016 8:05 AM	Microsoft Word D...	221 KB
BP54.doc	12/17/2015 8:29 AM	Microsoft Word 9...	70 KB



7) ONCE YOU SEE THAT YOUR DOCUMENTS ARE ATTACHED , YOU WILL SEE A QUESTION THAT YOU WILL NEED TO ANSWER

Attachments



BP54 revised 11 16

PM-1895 | File | Terry.L.DeMerchant



BP37PA_Participating_Adde...

PM-1895 | File | Terry.L.DeMerchant

[+ Attach new](#)



Does your contract have any exceptions to the State of Maine standard contract terms and conditions? *

Yes

No

Notes, comments, or questions to add to your submittal.

- 8) QUESTION “Does your contract have any exceptions to the State of Maine standard contract terms and conditions?” If you select YES, then you’ll have another question to answer “Is a legal review attached covering the changes to the State’s standard terms and conditions?” If you select YES to this question, then proceed to attach a file with legal’s review.

Does your contract have any exceptions to the State of Maine standard contract terms and conditions?*

Yes
 No

Is a legal review attached covering the changes to the State's standard terms and conditions?*

Yes
 No

Notes, comments, or questions to add to your submittal.

[Empty text input area]

- 9) If you select YES to the exceptions but NO to a legal review – please put in a comment as to why you did not get the review.

Does your contract have any exceptions to the State of Maine standard contract terms and conditions?*

Yes
 No

Notes, comments, or questions to add to your submittal.

IT ALWAYS HAS BEEN APPROVED IN PREVIOUS CONTRACTS

OPTIONAL FEATURE

- 10) There is an “Add a party” feature that will allow you to put in a member of your workgroup so that they will receive all notification e-mails that you do. In the upper right, click on the Other actions button and choose Add a party

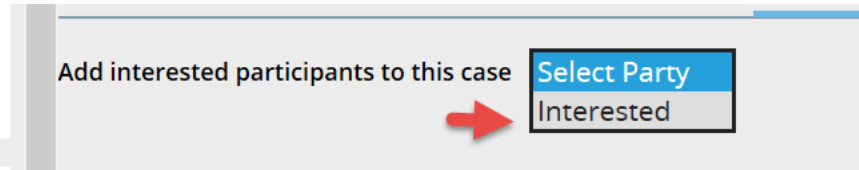
Save draft Other actions ▾ Discard Case Close

Refresh
Add a party

Upload Documents

I have all necessary signatures for each document.

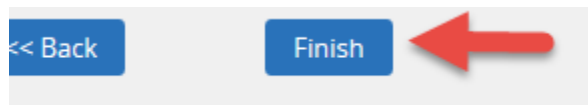
Under Select Party choose Interested



The page will open up where you can add the First Name, Last Name and E-mail. When done you would click on the Finish button.

A screenshot of a web form. The form is divided into two main sections: "Owner" and "Interested".
The "Owner" section contains:
- Operator ID: Terry.L.DeMerchant (with a dropdown arrow)
- Name: Terry.L.DeMerchant (with a trash icon)
- Phone number: 624-7334
- Title: _____
The "Interested" section contains:
- First Name *: Terry
- Middle Initial: _____
- Last Name *: DeMerchant
- Address: _____
- City: _____
- State: Select a state... (with a dropdown arrow and a trash icon)
- Phone: _____
- Zip: _____
- E-Mail *: Terry.L.DeMerchant@maine.g...
- Country: _____ (with a dropdown arrow)
At the bottom right of the form are two buttons: "<< Back" and "Finish".

YOU ARE ALL SET TO CLICK THE "Finish" BUTTON



11) YOU WILL THEN SEE THE STATUS OF SUBMITTED, WHICH MEANS IT HAS ROUTED TO THE DIVISION OF PURCHASES AND THE CASE IS CLOSED TO YOU FOR EDITING.

The screenshot displays a web interface for case management. At the top, there are navigation tabs: **Overview** (selected), Information, Attachments, Tools, and Audit. Below the tabs is the **Case details** section, which is organized into three columns. The first column contains: **Case ID** (PM-1895), **Created** (5 minutes ago), and **Created by** (Terry.L.DeMerchant). The second column contains: **Urgency** (10), **Goal** (4 days from now), and **Deadline** (7 days from now). The third column contains: **Status** (Submitted, with a red arrow pointing to it), **Last Update** (less than a minute ago), and **Last Updated By** (Terry.L.DeMerchant). Below this is the **Case information** section, titled **Enter Form Data**. It lists several fields: **Document Type *** (Contract), **Short Description of Goods or Services *** (Marine Resource Services), **Contractor Name *** (Marine Specialists), **Contract Start Date *** (3/17/17), **Advantage CT or RQS Number *** (20161005000000001221, with a red arrow pointing to it), **Department *** (13A-Department of Marine Resources), **Contract End Date *** (3/16/18), and **Internal Department Contract Number** (blank). At the bottom, a progress bar shows the following steps: **Submit Application** (green button with a checkmark), **Assign** (blue button), **Review** (grey button), **Disposition** (grey button), **Finalize** (grey button), and **Show all steps** (blue link).

YOU WILL ALSO SEE THAT THE BUTTON OF THE PAGE Submit Application IS IN GREEN AND CHECKED.