9.1 Edison FSCM Upgrade

Agency User's Guide

Table of Contents

Objectives

- Identify the changes in functionality from Edison 8.9 to Edison 9.1.
- Understand the functionality that has been added to Edison 9.1.
- Identify limitations and functionality that should not be used in Edison 9.1.

Introduction

The purpose of this manual is to outline the changes that will occur when Edison upgrades from version 8.9 to 9.1. The overall look of the system will change, but much of the functionality will remain the same. Outlined below are the changes in current functionality, additional functionality, and general pieces of information to aid in the use of Edison 9.1.

NOTE: This manual does not include complete navigation or functionality. It is only intended to explain changes that will take place with the Edison 9.1 upgrade.

Requisitions

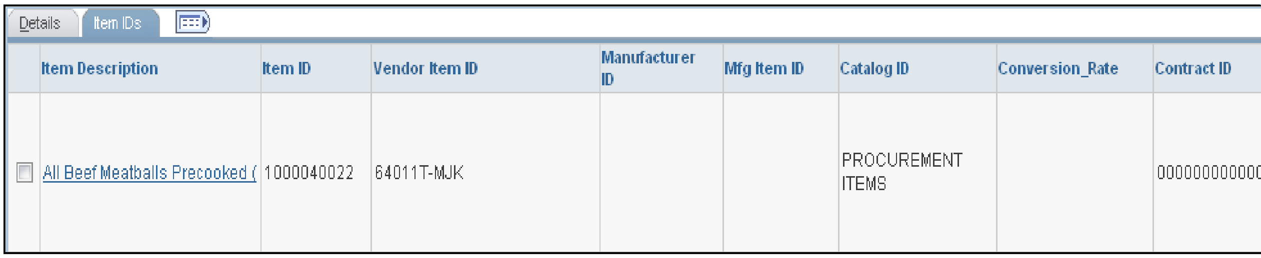
Item Detail

Previously when searching the catalog for items, all item information defaulted under the Details tab.

The contents of the Details tab have now been split into two tabs. The Details tab now contains the following: Item Description, Vendor, Manufacturer, Price, UOM, and Quantity.

The Item ID’s tab contains the following: Item Description, Item ID, Vendor Item ID, Manufacturer ID, Mfg Item ID, Catalog ID, Conversion Rate, Contract ID, SWC Number, More Information, and Corporate Contract. The new fields on this tab include Manufacturer ID and More Information.

9.1



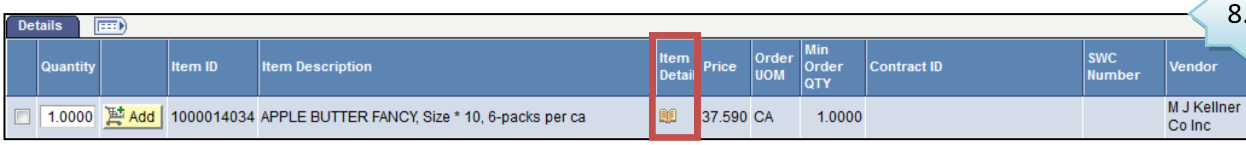
Details | Item IDs

	Item Description	Item ID	Vendor Item ID	Manufacturer ID	Mfg Item ID	Catalog ID	Conversion_Rate	Contract ID
	All Beef Meatballs Precooked (	1000040022	64011T-MJK			PROCUREMENT ITEMS		000000000000

Item Detail/Descriptions

The Item Details for a line were previously accessed by clicking on the Item Detail icon.

8.9



Details

	Quantity		Item ID	Item Description	Item Detail	Price	Order UOM	Min Order QTY	Contract ID	SWC Number	Vendor
	1.0000	Add	1000014034	APPLE BUTTER FANCY, Size * 10, 6-packs per ca		37.590	CA	1.0000			M J Kellner Co Inc

The Item Detail icon no longer exists. The user will click the Item Description link to navigate to the item details.

9.1

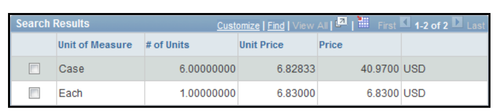
Item Detail — Customize | Find | View

Details | Item IDs

	Item Description	Vendor		Manufacturer	Price		UOM		Quantity	
	BOXES, CORRUGATED, COMPLETE W/	Boxes Etc II LLC			1.18000	USD	Carton		1.0000	Add
	BOXES, CORRUGATED, COMPLETE W/	Dominion Box Co Inc			1.17000	USD	Each		1.0000	Add
	BOXES, CORRUGATED, COMPLETE W/	Boxes Etc II LLC			1.14000	USD	Carton		1.0000	Add

HINT

Click on the look-up icon next to the UOM to reveal more information about quantity, including alternate UOM’s.

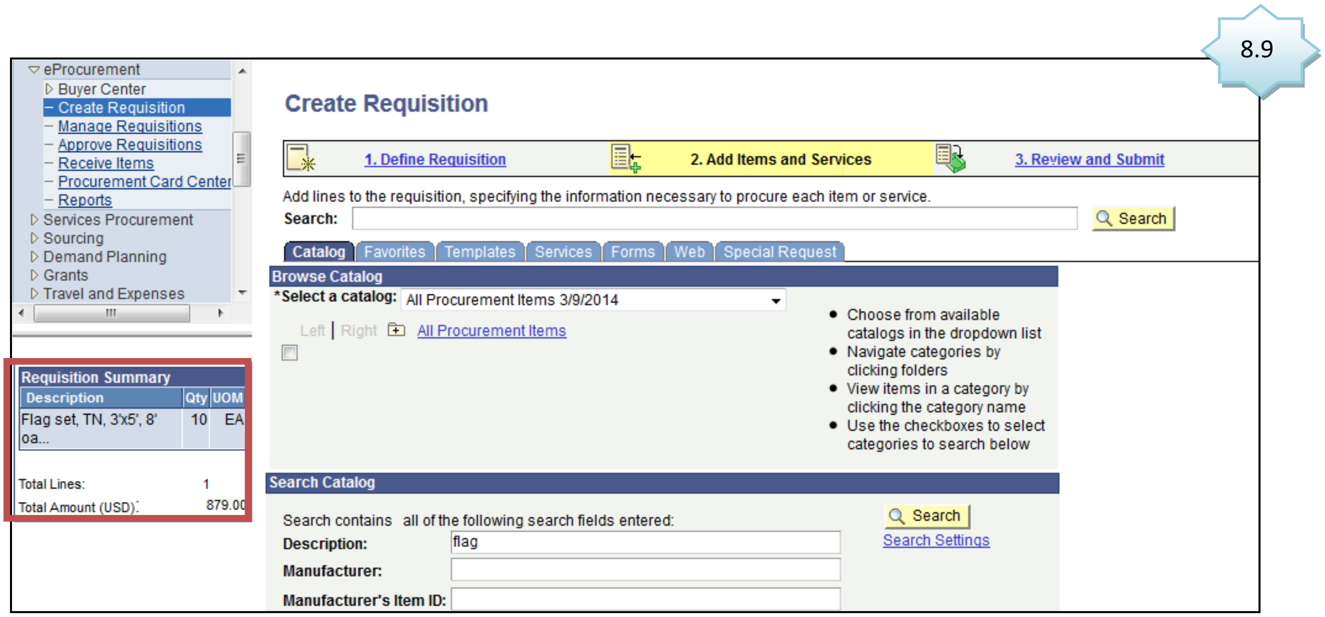


Search Results — Customize | Find | View All | First 1-2 of 2 Last

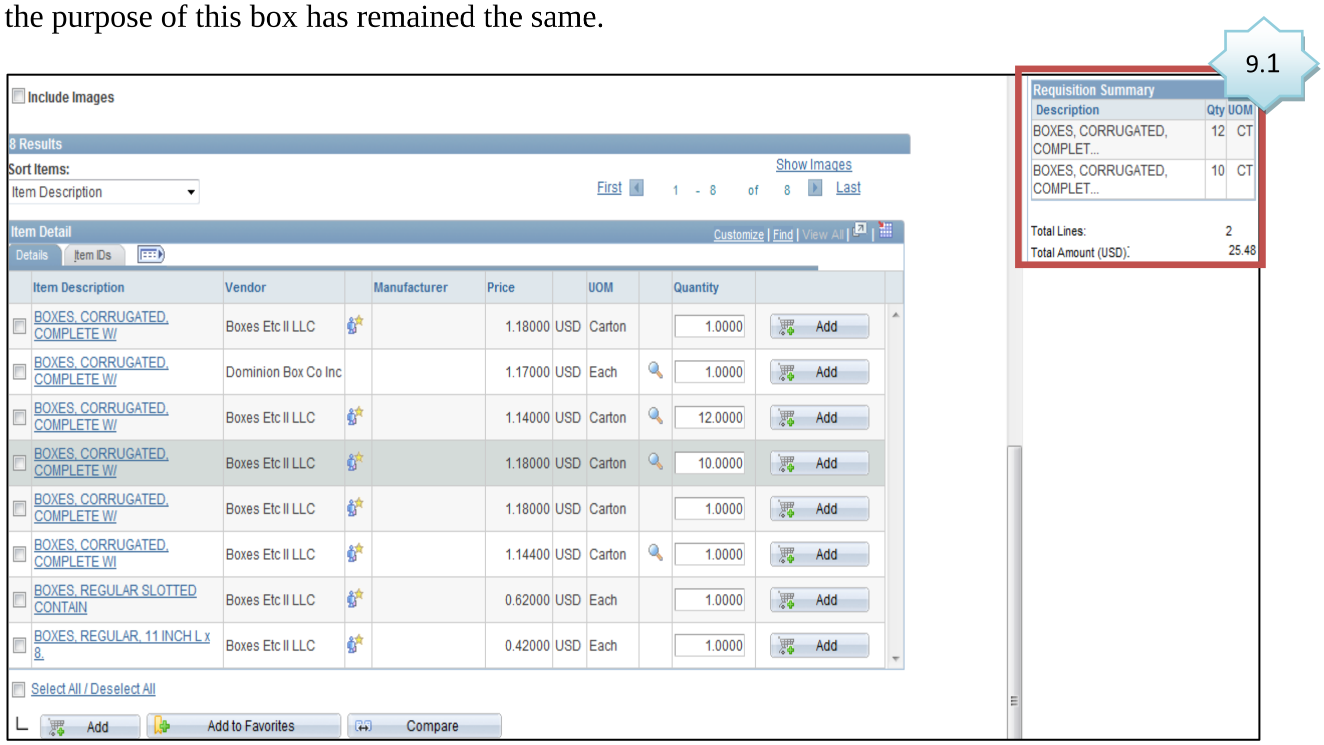
	Unit of Measure	# of Units	Unit Price	Price	
	Case	6.00000000	6.82833	40.9700	USD
	Each	1.00000000	6.83000	6.8300	USD

Requisition Summary Box

Previously the Requisition Summary box was located on the left side of the screen, under the navigation.

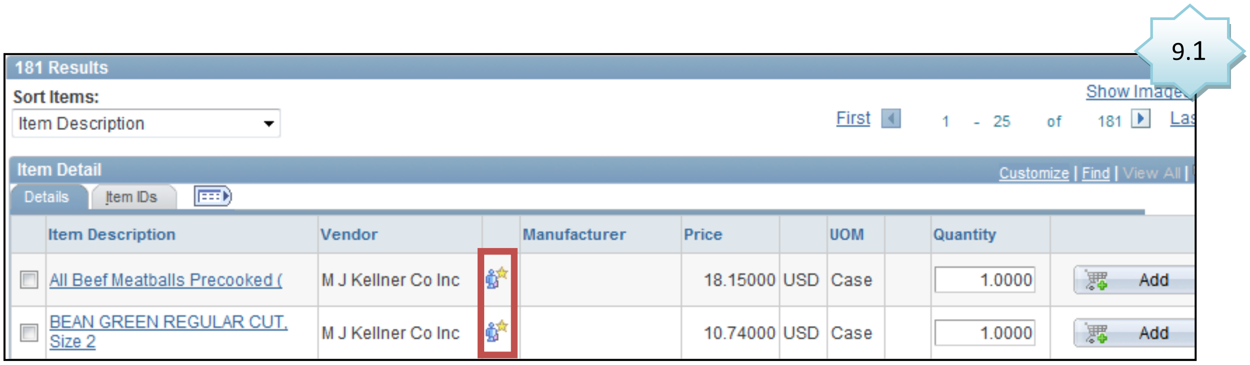


The Requisition Summary box is now located on the right side of the screen. The function and the purpose of this box has remained the same.



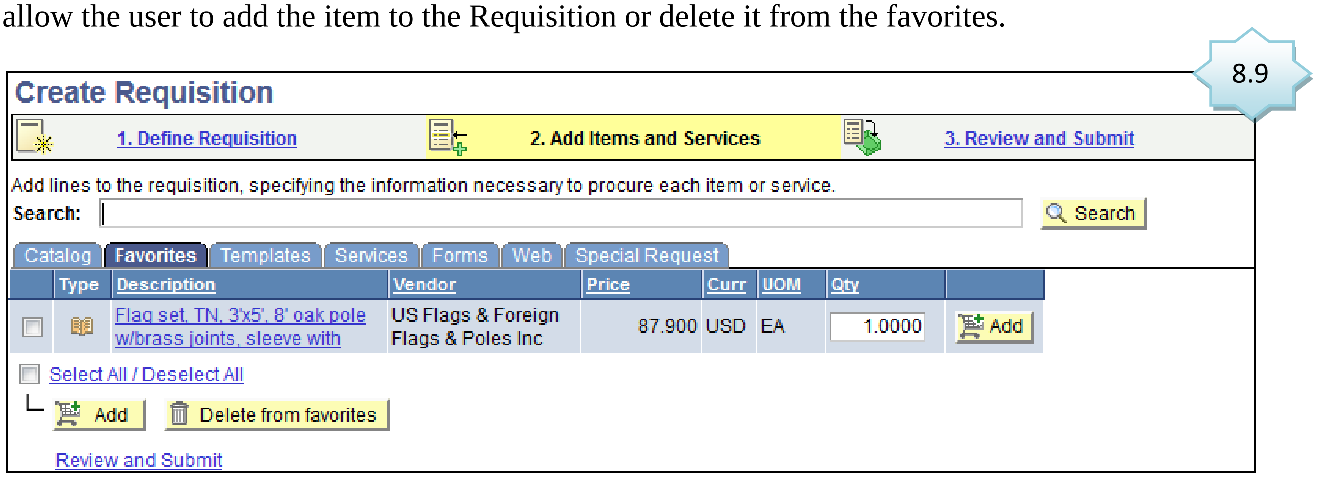
Preferred Vendors

Functionality exists in the Catalog tab in the Requisition that allows the requester to easily identify the items that are available on contract. If an item is a contracted item it will have a preferred vendor icon next to the name of the vendor. This should assist agency users when they are identifying contract versus non-contract items.

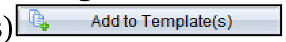


Status Column

The lines that are saved on the Favorites tab previously consisted of the following: Type, Description, Vendor, Price, Curr, UOM, Quantity, and the Add button. Buttons along the bottom allow the user to add the item to the Requisition or delete it from the favorites.



The lines that are saved on the Favorites tab now include a status. <u>This information tells the requester if the line they are adding from their favorites is “Active” or “Item Inactive.”</u> Two new buttons have been added along the bottom allowing the user to Add to Favorites Group 

or Add to Template(s) 

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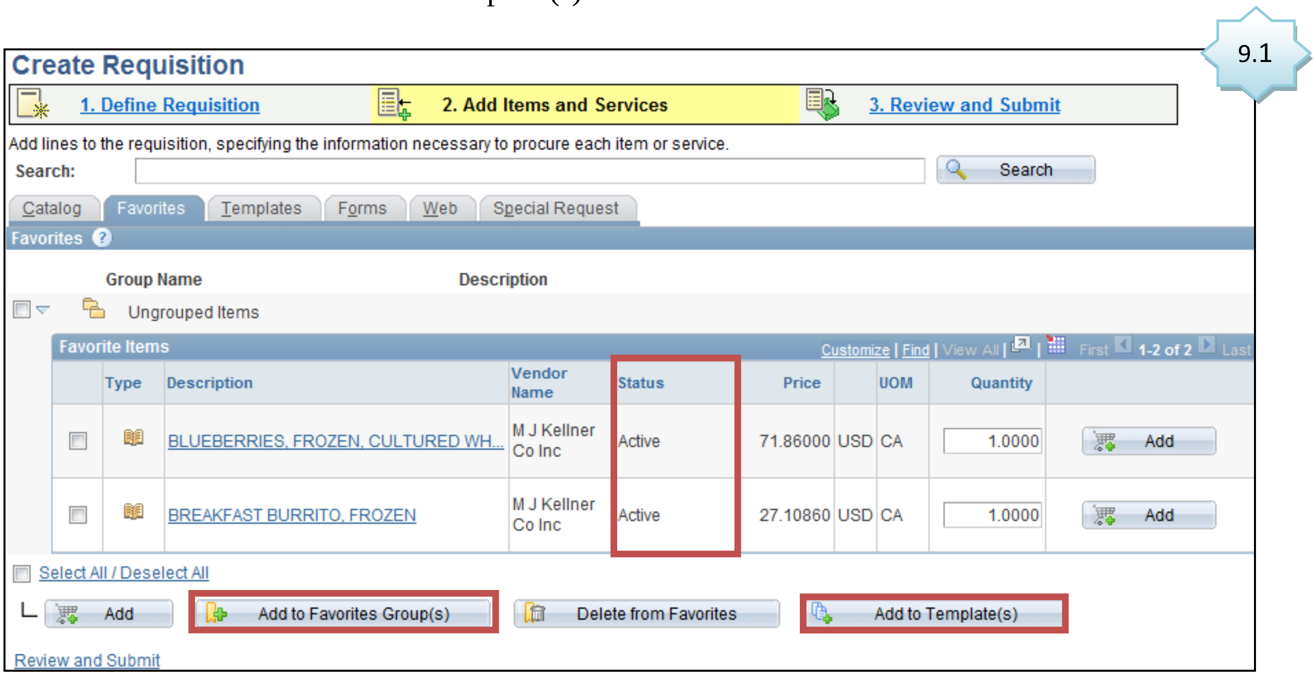
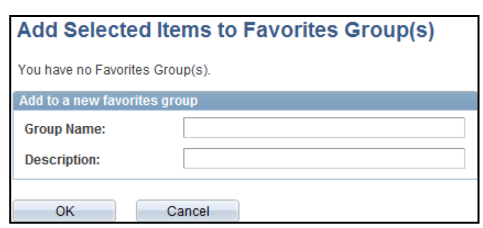


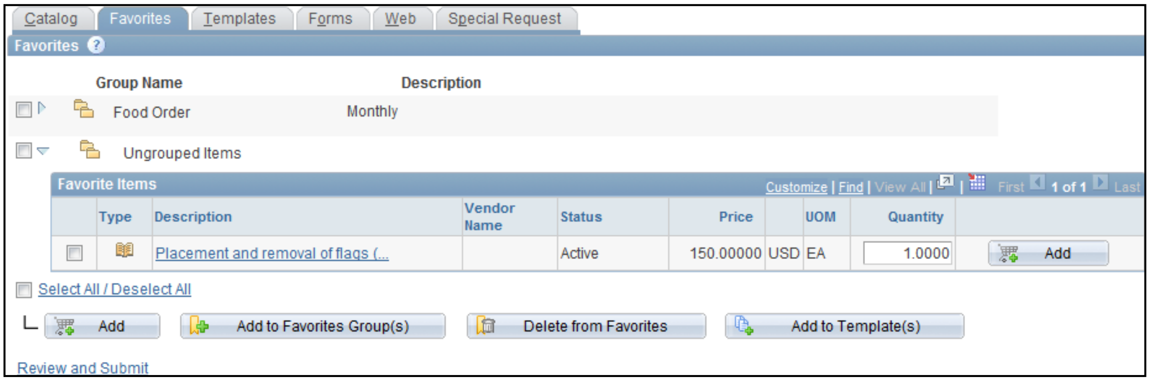
Creating a Favorites Group

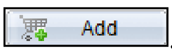
Follow the steps below to create a Favorites Group.



1. Select the lines that you want added to your group. These lines should already be added to your favorite items.
2. Click the **Add to Favorites Group(s)** button. This will populate the Add Selected Items to Favorites Group(s) screen.

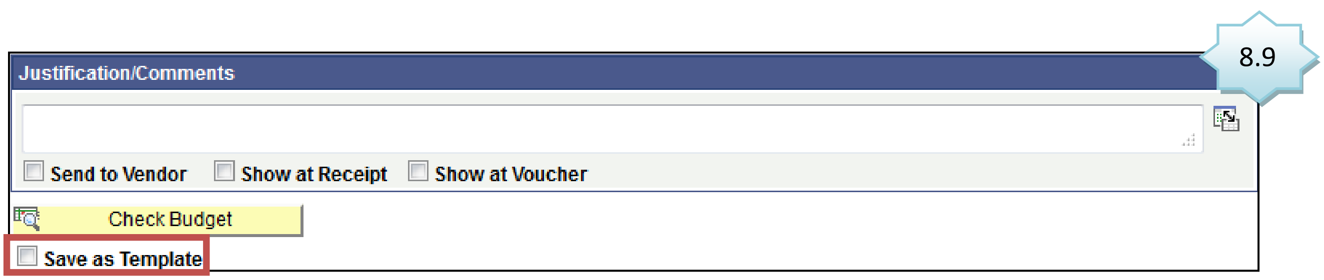
3. Enter a Group Name and Description.
4. Click **OK**. This will return you to the Favorites tab with the Group Name populated under the Favorites tab.



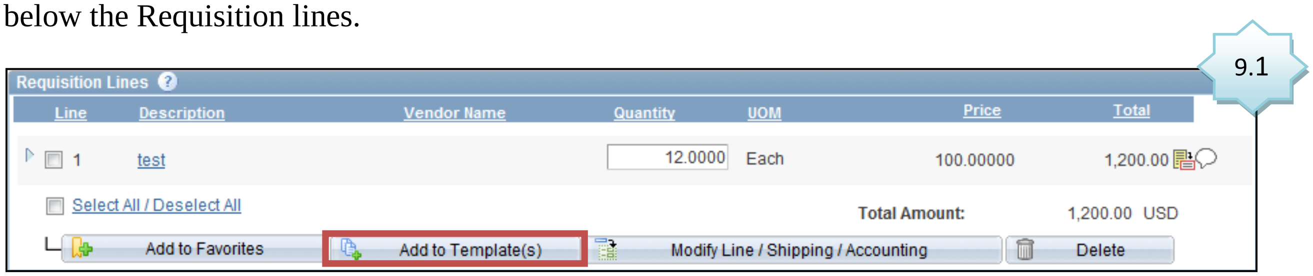
HINT *To order the group, click on the check box next to the Group Name and then click* .

Add to Template(s)

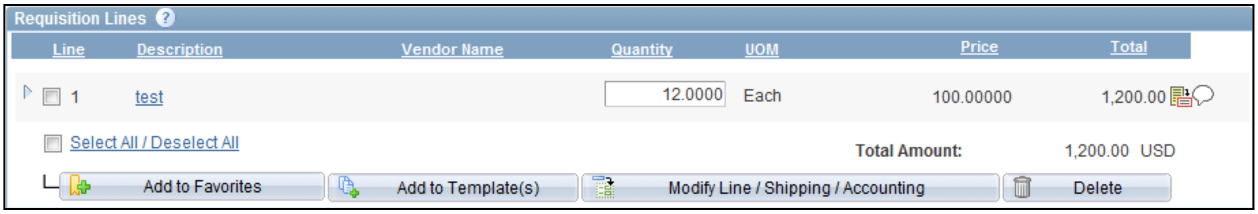
Previously the field that allowed the user to save the Requisition as a template was located under the Check Budget button.



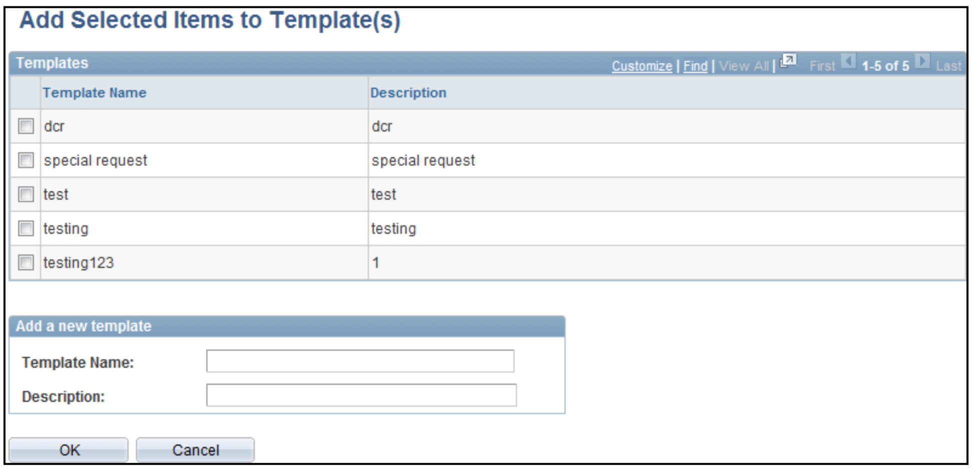
This functionality has now been moved and is now the **Add to Template(s)** button located below the Requisition lines.



Once all necessary information has been entered in to the Requisition the steps below can be followed to create a template.



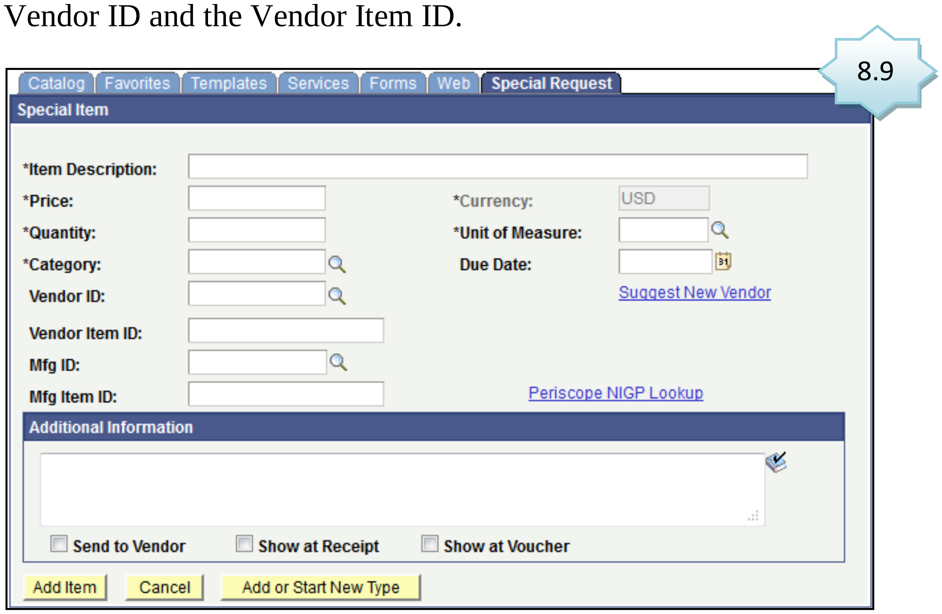
1. Select the lines to be added to the template.
2. Click the **Add to Template(s)** button. This will bring you to the Add Selected Items to Template(s) screen.



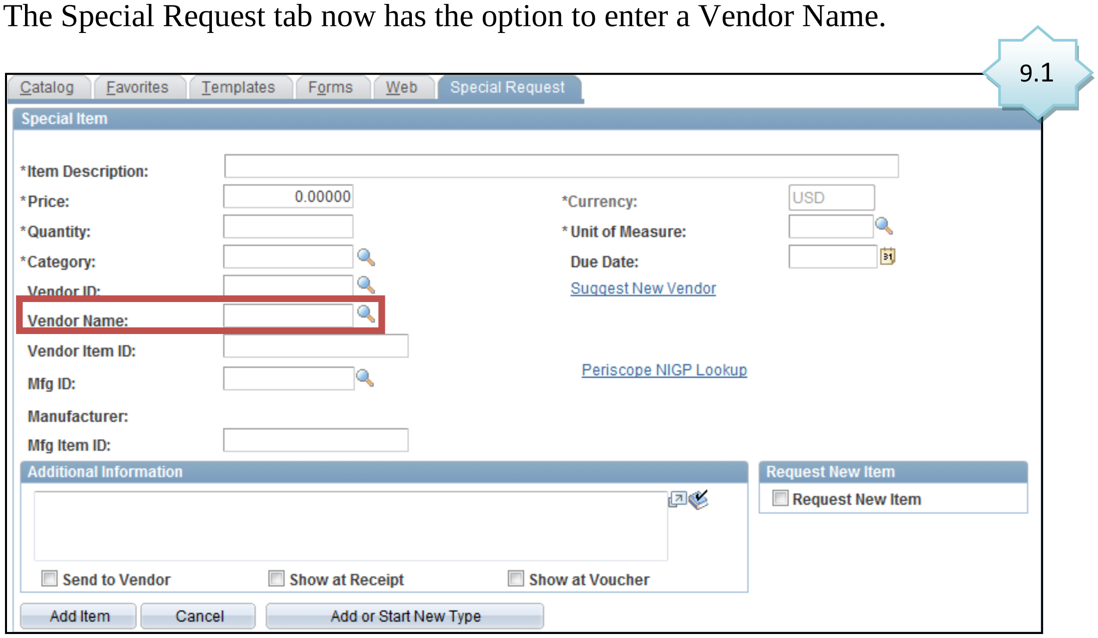
This screen gives the requester the option to add the items to an existing template or add a new template. To add the lines to an existing template click the checkbox beside the template name. To add a new template, enter a template name and description. Click **OK**, this will add your items to or create a new template.

Special Request Tab

Previously the only vendor information that could be input on the Special Request tab was the Vendor ID and the Vendor Item ID.

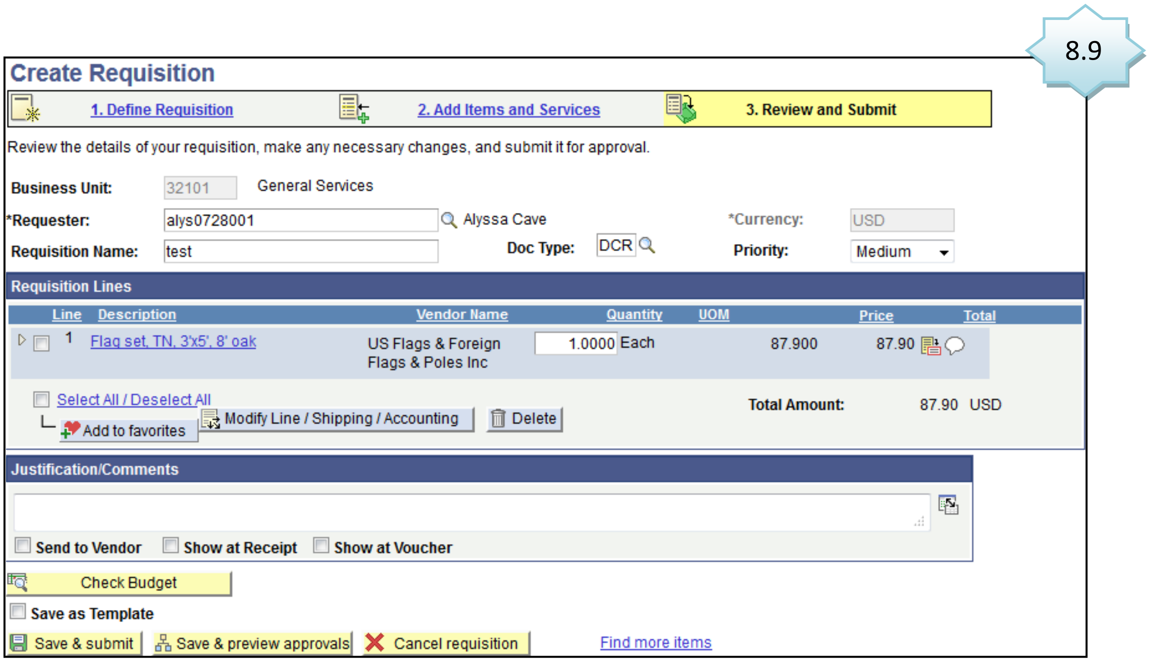


The Special Request tab now has the option to enter a Vendor Name.

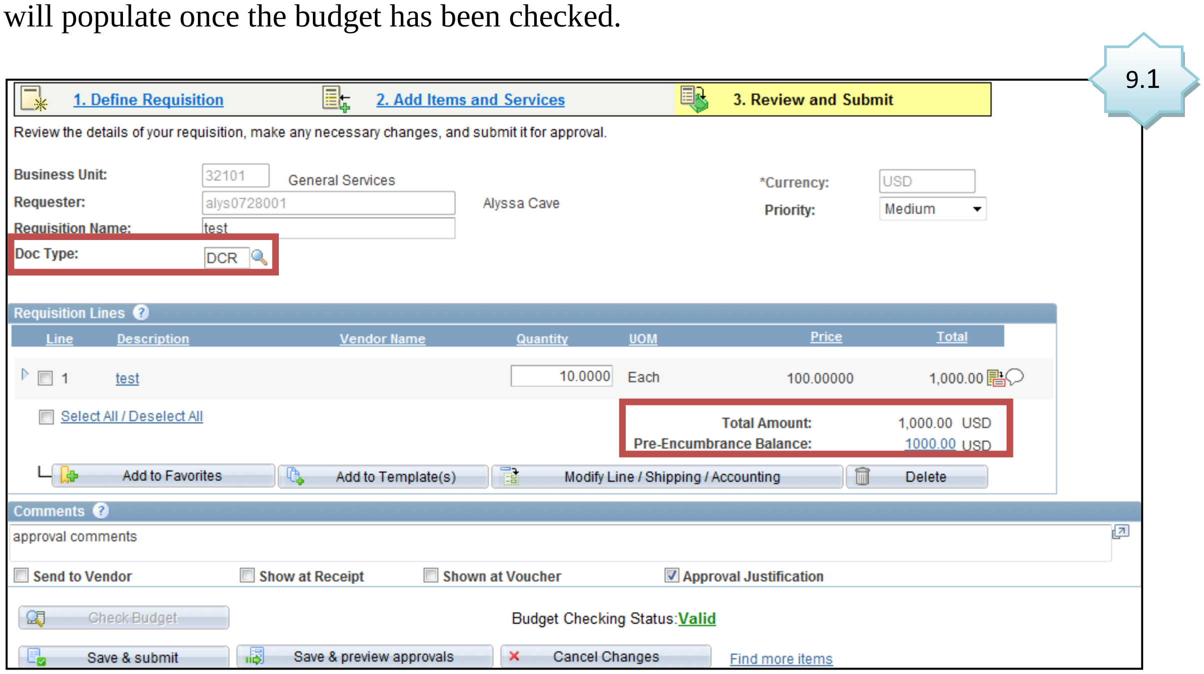


Changes to Review & Submit Page

The field for the Doc Type was previously located beside the Requisition Name field, and there was no option to show the Justification/Comments during the approval.

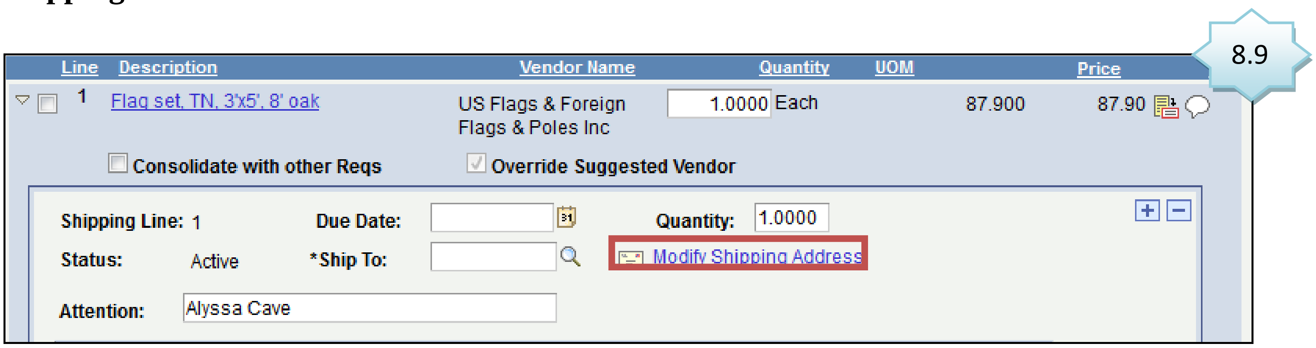


The field for the Doc Type is now located under the Requisition Name field. There is also now the **Approval Justification** checkbox that allows the requester to have the comments entered on the Requisition shown during approvals. The Justification/Comments box has been renamed the Comments box. A Pre-Encumbrance Balance field has been added below Total Amount, this will populate once the budget has been checked.

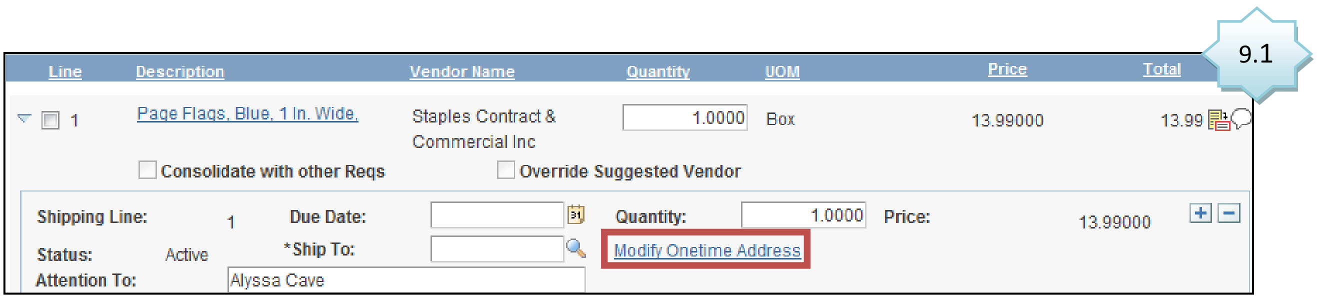


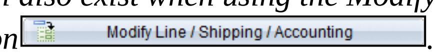
Modify Shipping Address

The link to modify shipping addresses on a Requisition was previously called the **Modify Shipping Address** link.



The link to modify shipping addresses on a Requisition is now called the **Modify Onetime Address**.



This field will allow the requester to enter 20 characters, when all Ship To codes should be limited to 10 characters. Confirm before submitting that the correct Ship To is being used. This issue will also exist when using the Modify Line/Shipping/Accounting button 

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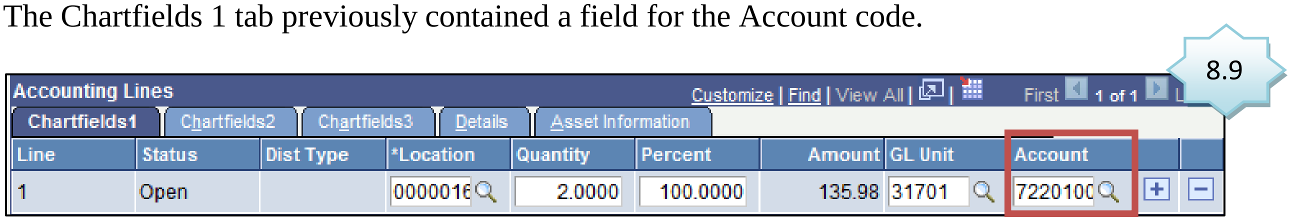
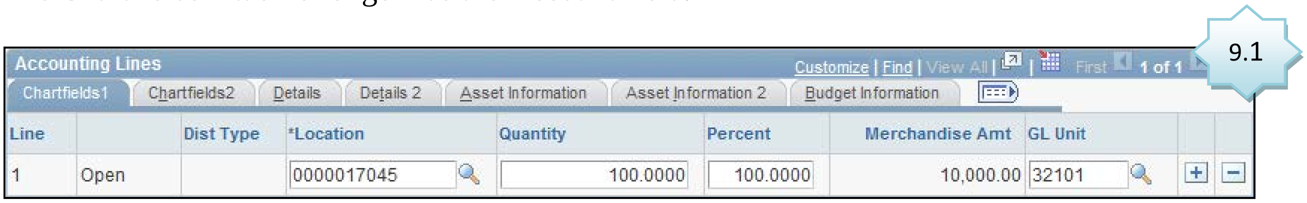
Chartfields

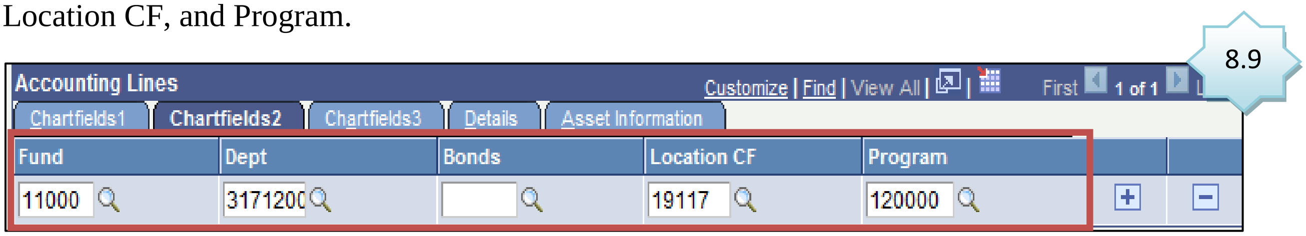
The Chartfields 1 tab previously contained a field for the Account code.



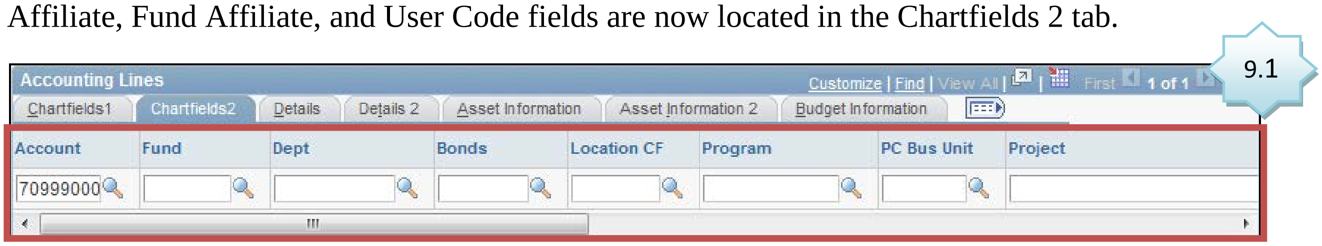
The Chartfields 1 tab no longer has the Account field.



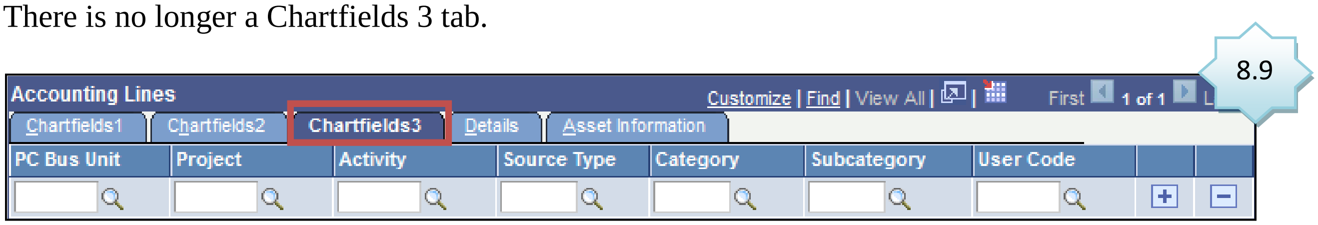
The Chartfields 2 tab previously contained only the following fields: Fund, Dept, Bonds, Location CF, and Program.



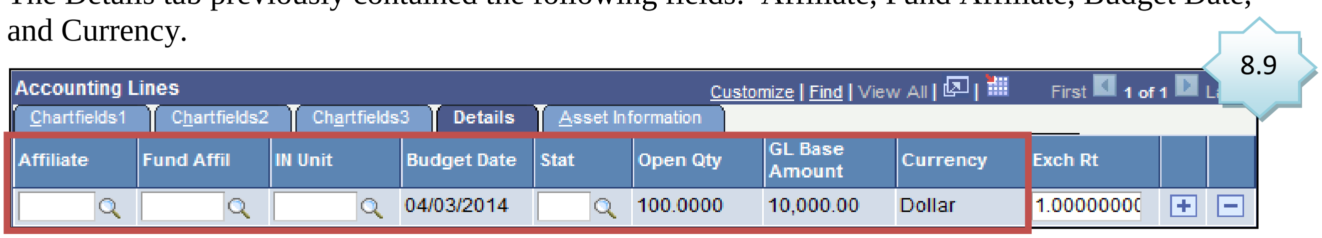
The Account code, PC Bus Unit, Project, Activity, Source Type, Category, Subcategory, Affiliate, Fund Affiliate, and User Code fields are now located in the Chartfields 2 tab.



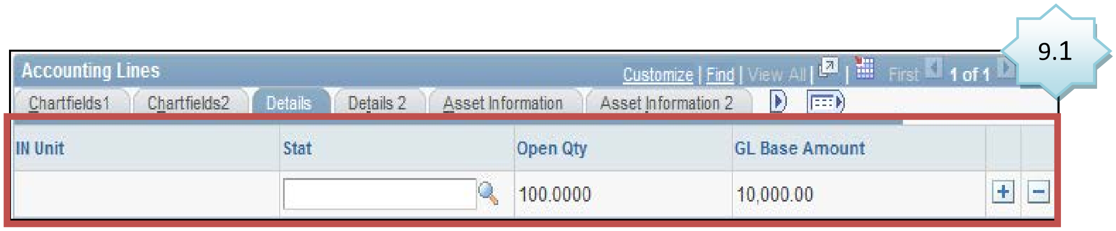
There is no longer a Chartfields 3 tab.



The Details tab previously contained the following fields: Affiliate, Fund Affiliate, Budget Date, and Currency.

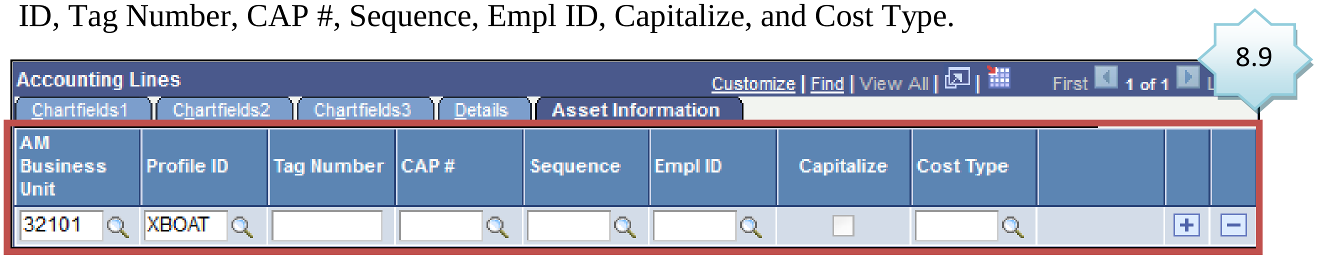


The Details tab still contains the IN Unit, Stat, Open Qty, and GL Base Amount fields.

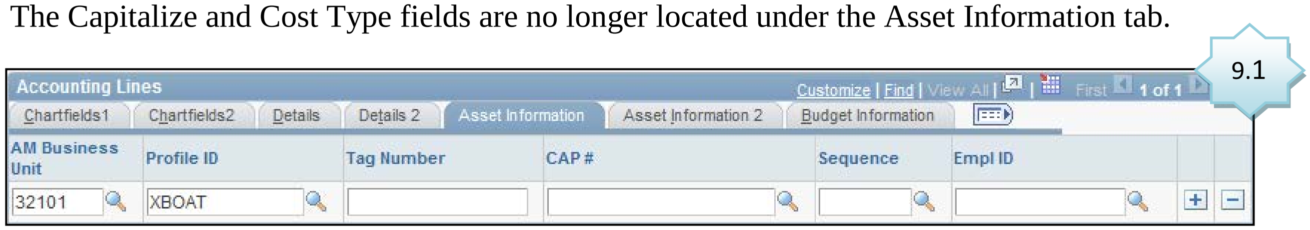


The Currency field is now located under the Details 2 tab. There is a new Exchange Rate Detail icon.

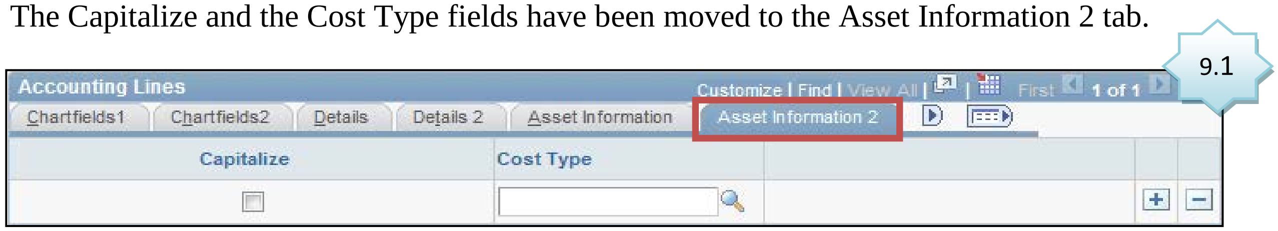
The Asset Information tab previously contained the following fields: AM Business Unit, Profile ID, Tag Number, CAP #, Sequence, Empl ID, Capitalize, and Cost Type.



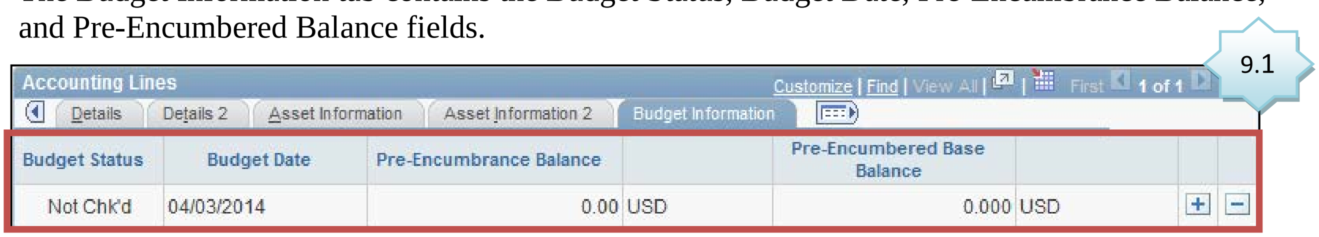
The Capitalize and Cost Type fields are no longer located under the Asset Information tab.



The Capitalize and the Cost Type fields have been moved to the Asset Information 2 tab.



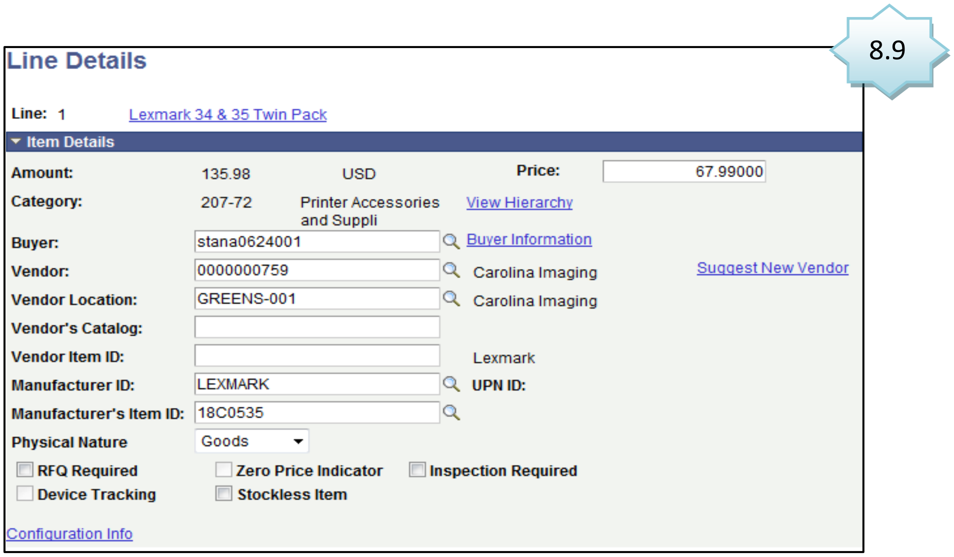
The Budget Information tab contains the Budget Status, Budget Date, Pre-Encumbrance Balance, and Pre-Encumbered Balance fields.



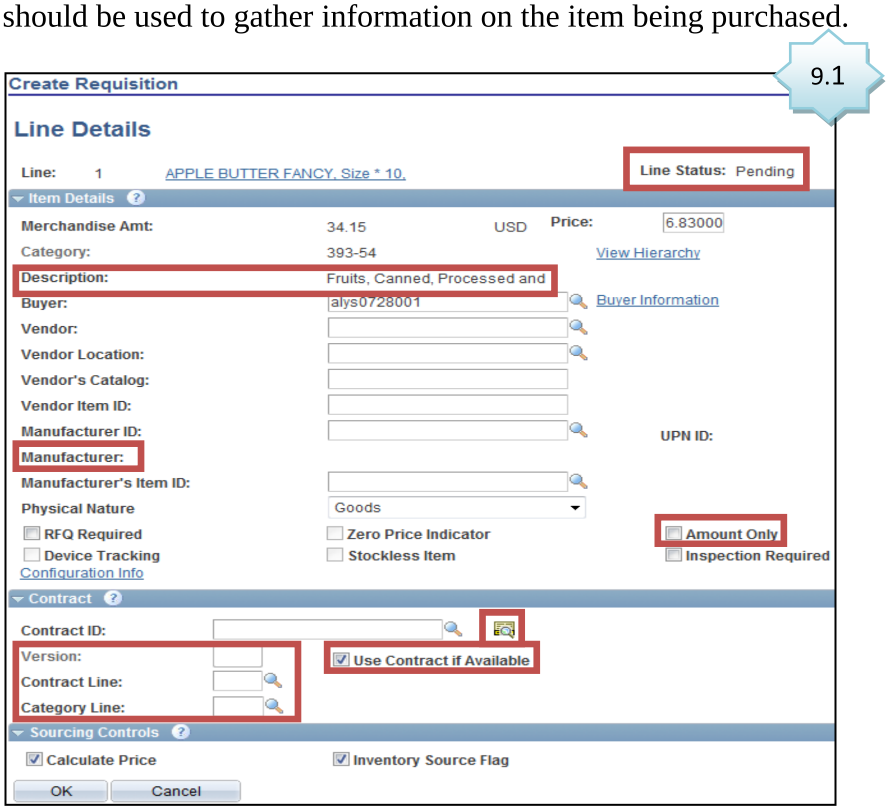
HINT *Contact your agency's Fiscal Office for more information on how these fields are to be used since the information input here will vary from agency to agency.*

Line Details

Previously on the Line Details screen there were fewer fields, and the link to Suggest New Vendors existed.

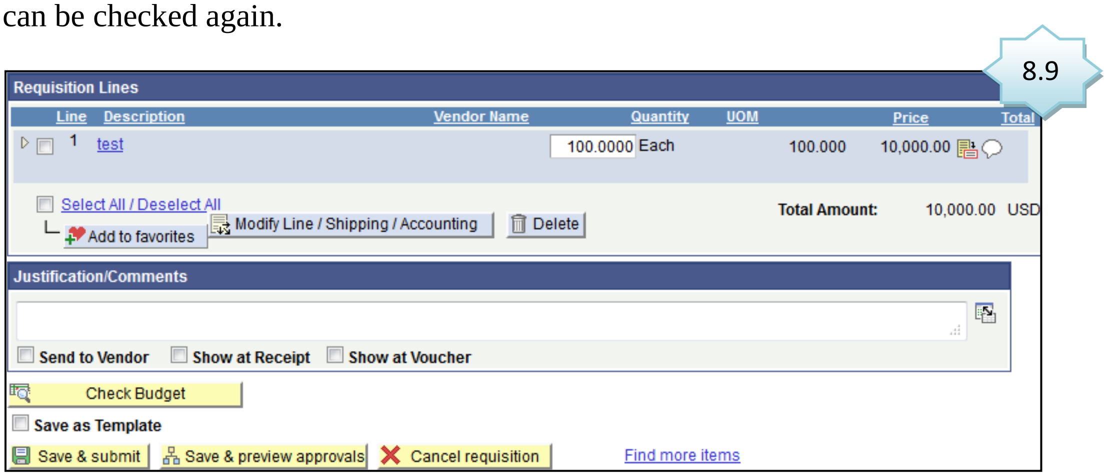


The Suggest New Vendor link has been removed, and the following fields have been added to the Line Details page: Line Status, Description, Manufacturer, Amount Only, Contract Search icon, Version, Use Contract if Available, Contract Line, Category Line. While it is not necessary for the Requester to utilize any of the functionality on the screen, this screen is a resource that should be used to gather information on the item being purchased.

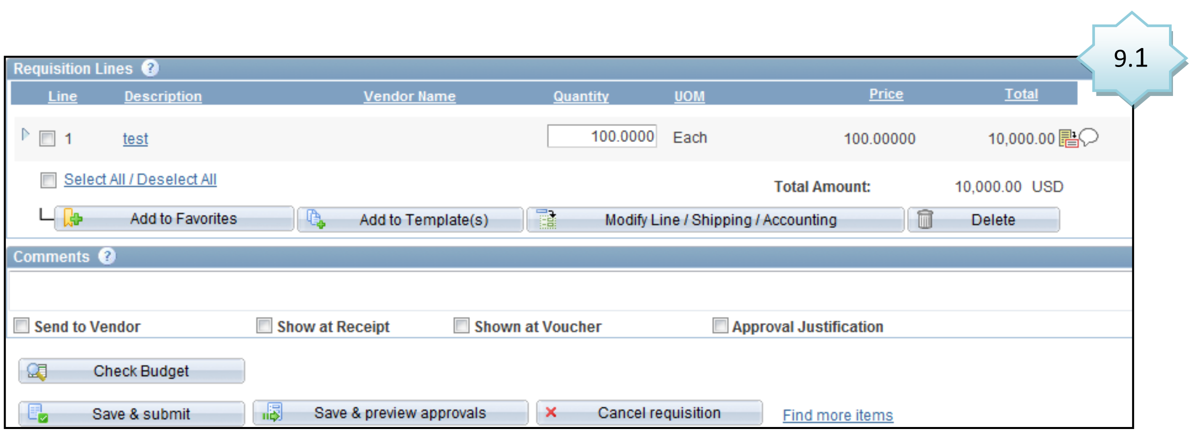


Budget Check

Previously if changes were made to the quantity on a Requisition line after the budget check had occurred, then it would be necessary and click **Save and Preview Approvals** before the budget can be checked again.



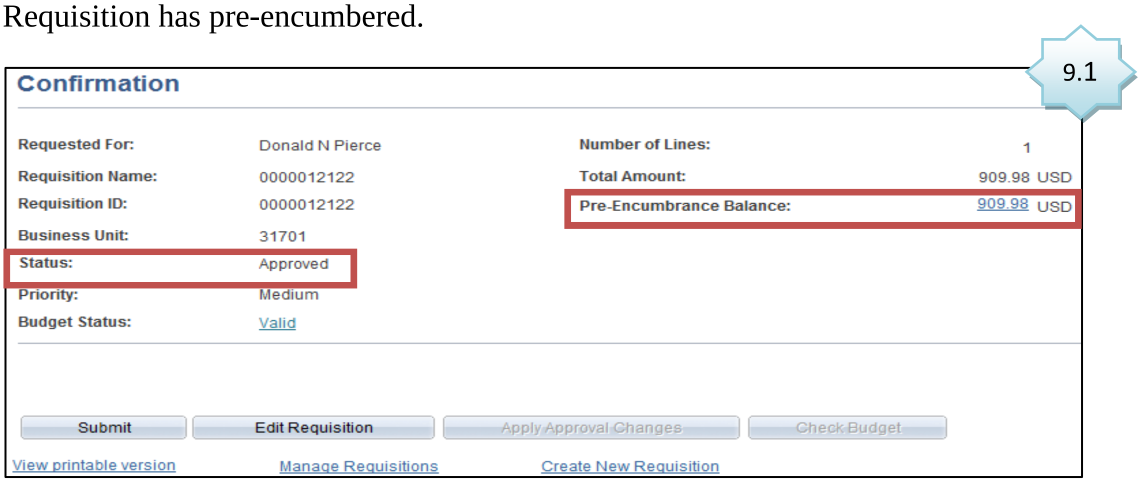
Now if changes are made to quantities on an existing line item, and the Requisition is already budget checked, either click **Save and Preview Approvals** OR **Save and Submit**. There is no need to budget check again, Edison will auto budget check. However, if another line item is added, the budget check will have to be done again.



Requisition Confirmation

Previously the Confirmation screen did not allow you to check the Status of a Requisition, and while the Requisition has always pre-encumbered it did not confirm the balance that was pre-encumbered.

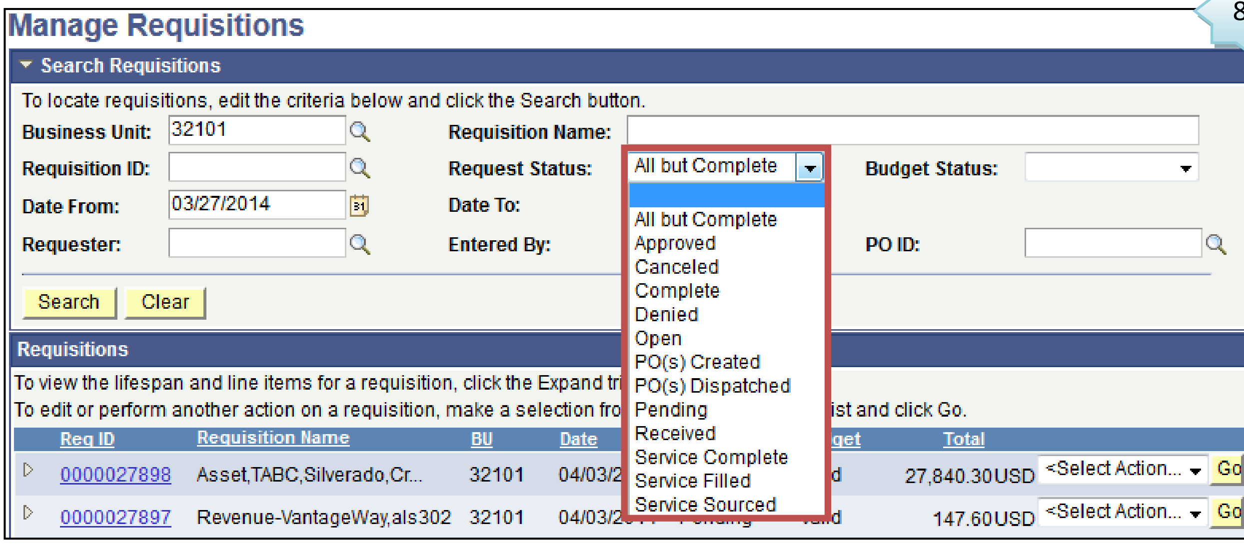
The Confirmation screen now includes the status of the Requisition and the total amount that the Requisition has pre-encumbered.



Manage Requisitions Searching

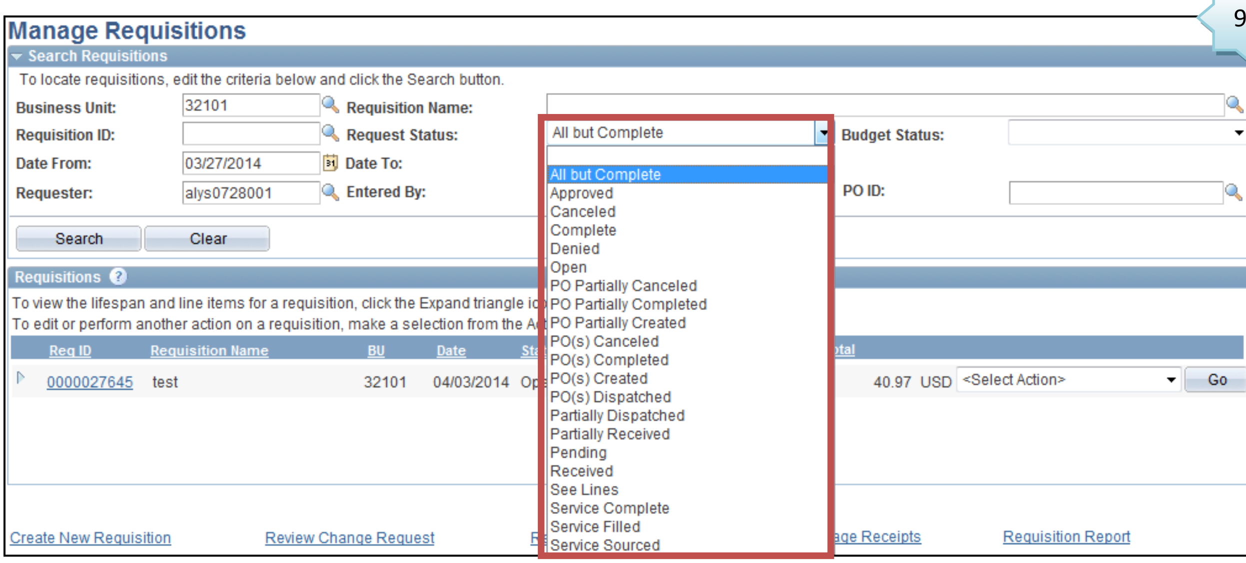
Previously when searching for Requisitions the following Request Statuses existed: All but Complete, Approved, Canceled, Complete, Denied, Open, PO(s) Created, PO(s) Dispatched, Pending, Received, Service Complete, Service Filled, and Service Sourced.

8.9

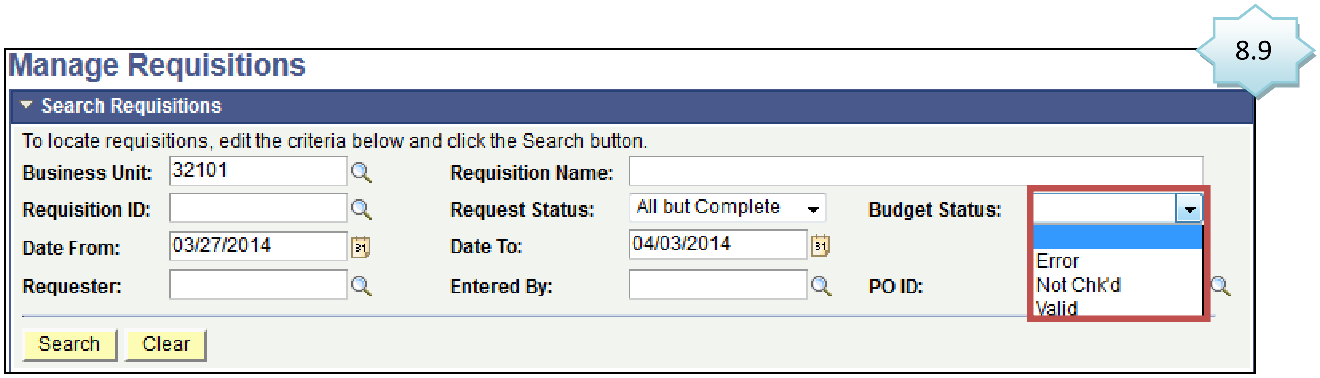


There is now the option to filter by the following additional Request Statuses when searching for a Requisition: PO Partially Canceled, PO Partially Completed, PO Partially Created, PO(s) Canceled, PO(s) Completed, Partially Dispatched, Partially Received, or See Lines.

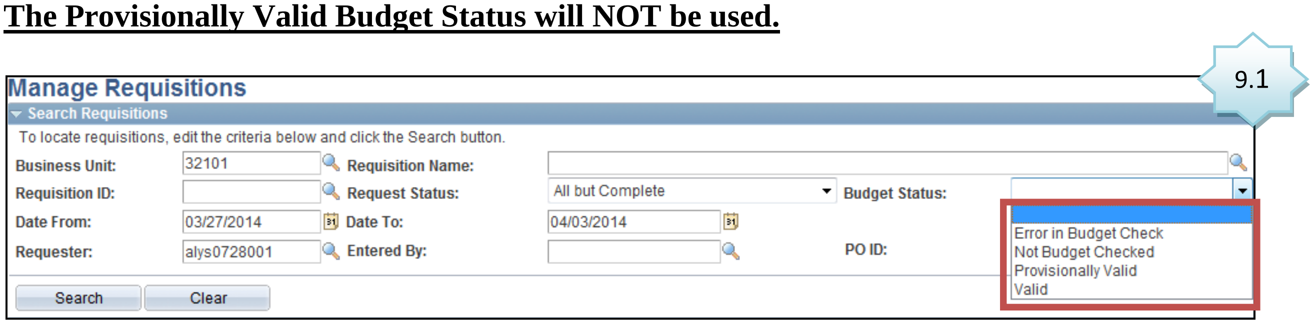
9.1



Previously there were three Budget Status options to use when searching on the Manage Requisition screen. These statuses were Error, Not Chk'd, and Valid.

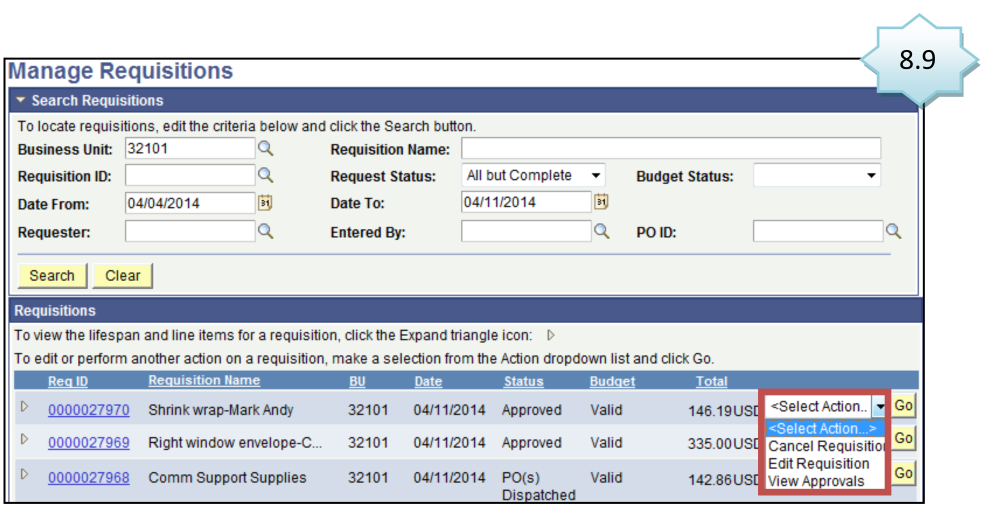


The options for the Budget Status have been updated. The name for an error has now changed to Error in Budget Check, and the name for a budget not being checked is Not Budget Checked. **<u>The Provisionally Valid Budget Status will NOT be used.</u>**

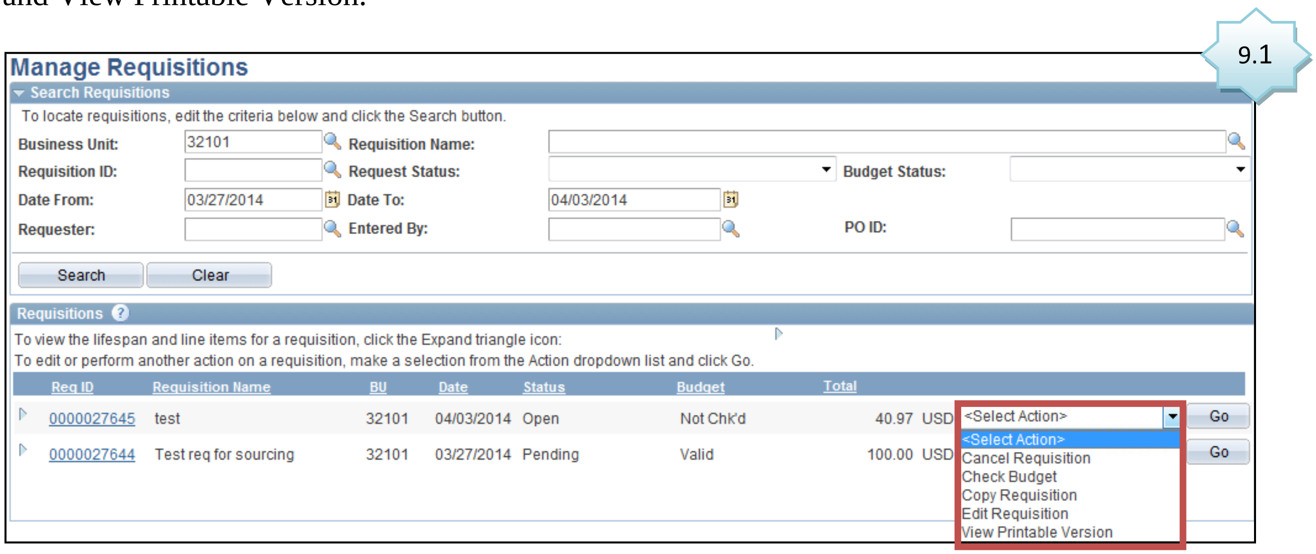


Select Option Drop-Down Menu

The previous options from the Select Action drop-down menu are still available. These options vary depending on the Status of the Requisition and include: Cancel Requisition, Edit Requisition, Change Request, Receive Order, Return to Vendor, and View Approvals.

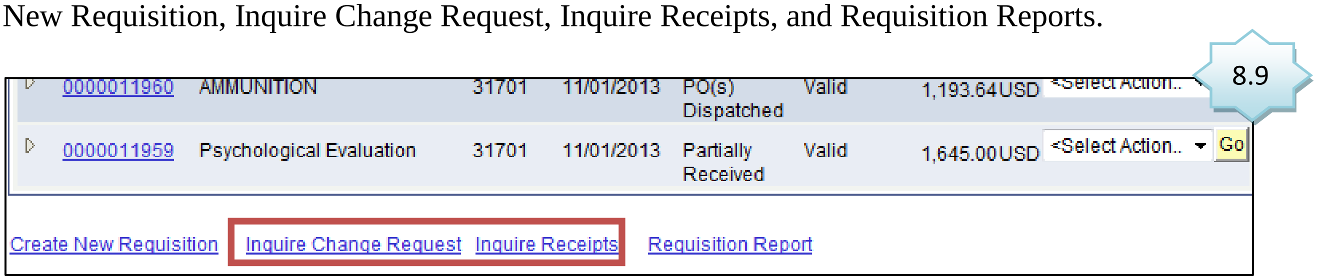


The new options that are available from the Select Action drop-down menu are Copy Requisition and View Printable Version.

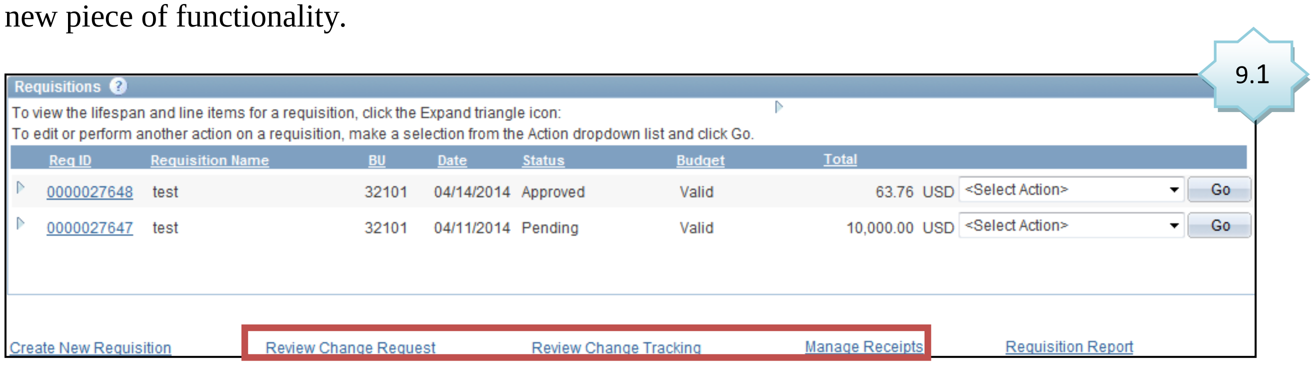


Review Change Tracking

At the bottom of the Mange Requisition there were previously links for the following: Create New Requisition, Inquire Change Request, Inquire Receipts, and Requisition Reports.

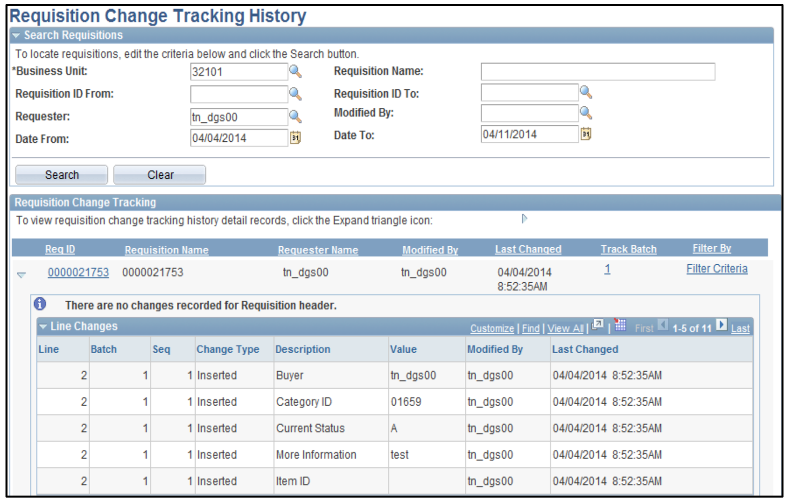


The Create New Requisition and Requisition Report links have remained the same. The link name of Inquire Change Request has been changed to Review Change Request and the link name of Inquire Receipts has changed to Manage Receipts. The Review Change Tracking link is a new piece of functionality.



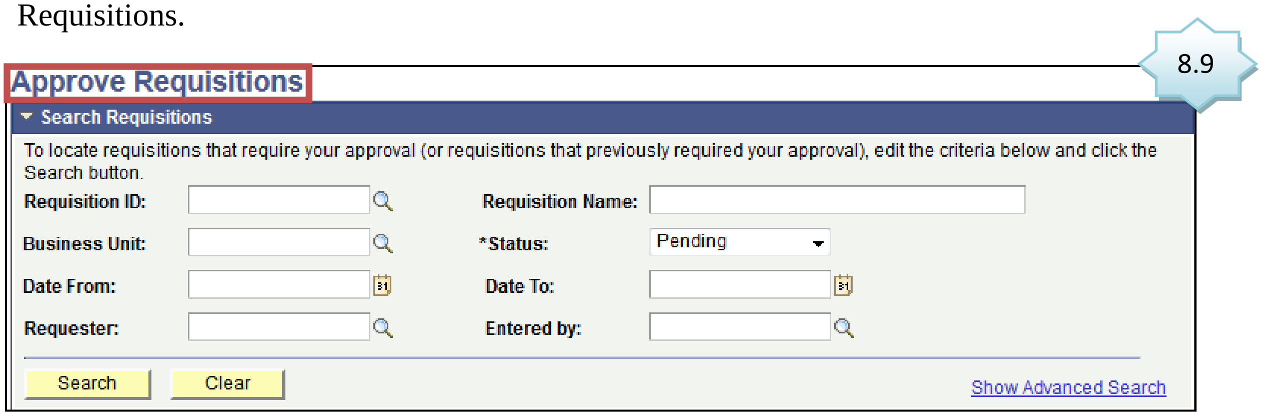
The Change Tracking History feature allows the user to track all changes and actions made in regards to a specific Requisition. Follow the steps below to use the Review Change Tracking feature.

1. Click the **Review Change Tracking** link.
2. Enter the search information.
3. Click **Search**.
4. Click the Expand Section arrow next to the Req ID to view the history of the Requisition.

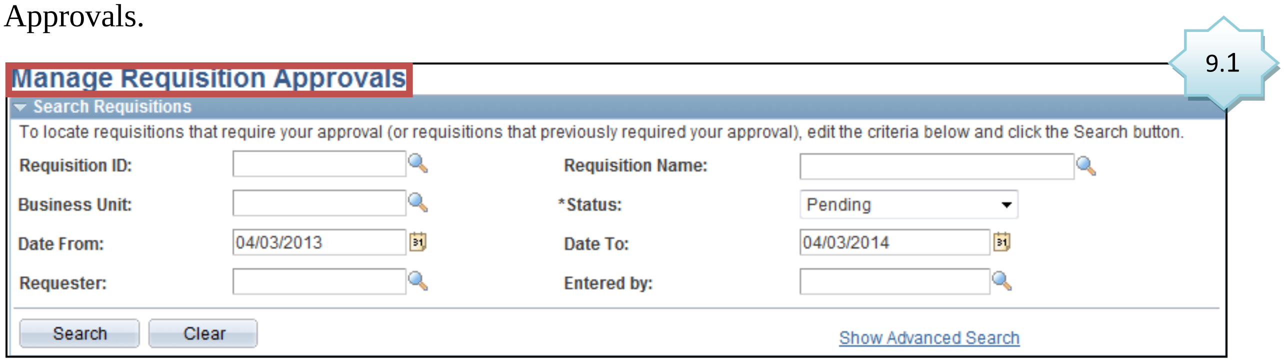


Manage Requisition Approvals

The previous name for the screen that is used to approve Requisitions was called Approve Requisitions.



The name of the screen that is used to approve Requsitions is now called Manage Requsition Approvals.

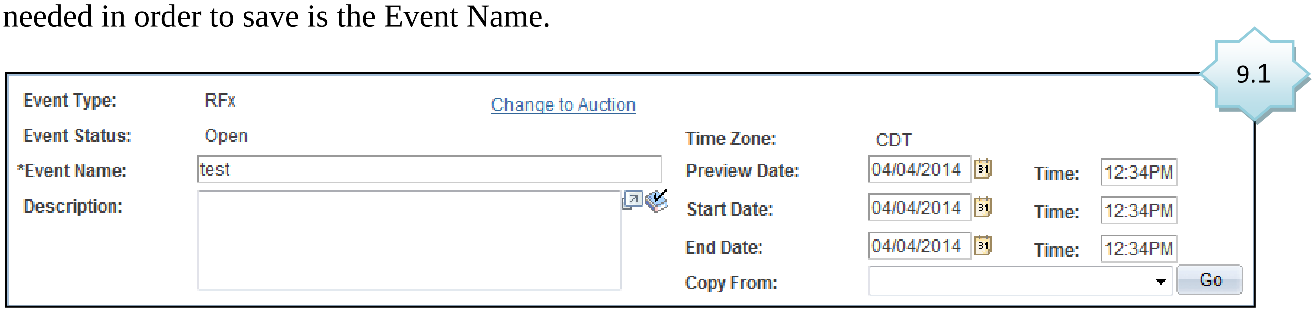


HINT *The navigation to the screen will be reflective of the screens name change.*

Main Menu > FSCM > eProcurement > Manage Requisition Approvals

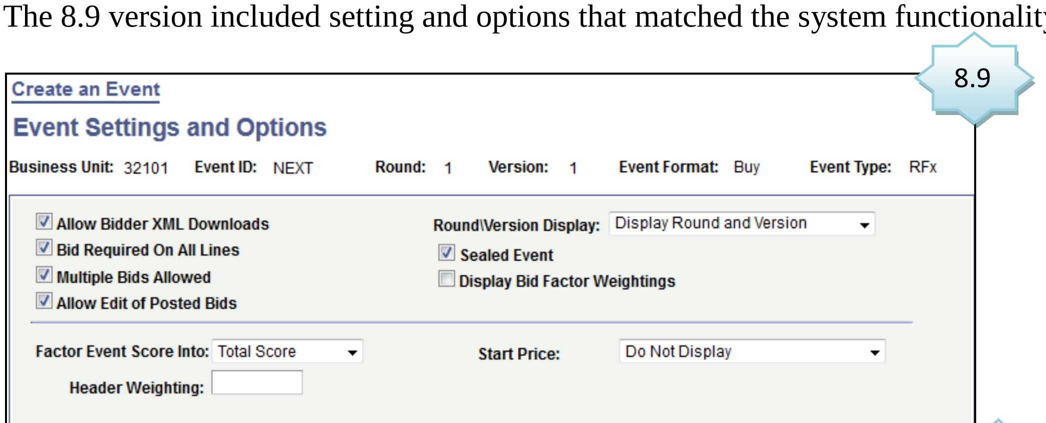
Saving an Event

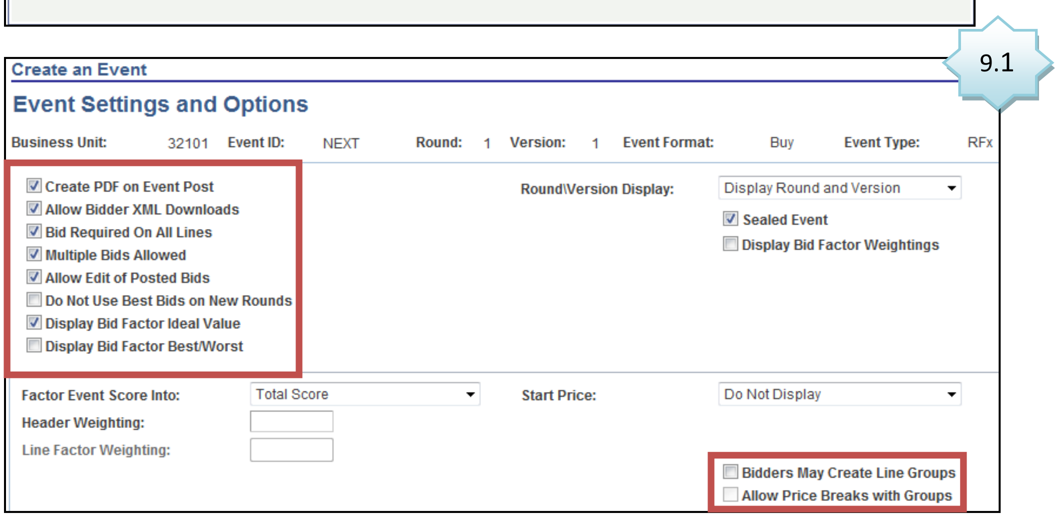
It is no longer necessary to have a line item in order to save an Event. The only item that is needed in order to save is the Event Name.



Event Settings and Options

The options on the Event Settings and Options are reflective of the functionality they control. The 8.9 version included setting and options that matched the system functionality.



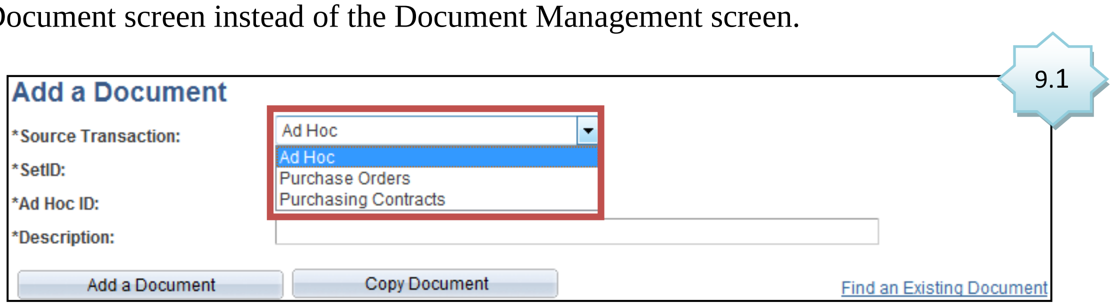


The Event Settings and Options page now includes options for the new functionality. Below are the new settings available in Event Settings and Options:

- Create PDF on Event Post – this creates a PDF copy of the Event Details (leave this selected)
- Do Not Use Best Bids on New Rounds – this functionality is not currently being utilized (leave this deselected)
- Display Bid Factor Ideal Value – this will display an ideal response (leave this selected ONLY if this functionality is being used)
- Display Bid Factor Best/Worst – this functionality is not currently being utilized (deselect this option)
- Bidders May Create Line Groups – this functionality is not currently being utilized (leave this deselected)
- Allow Price Breaks with Groups – this functionality is not currently being utilized (leave this deselected)

Terms and Conditions

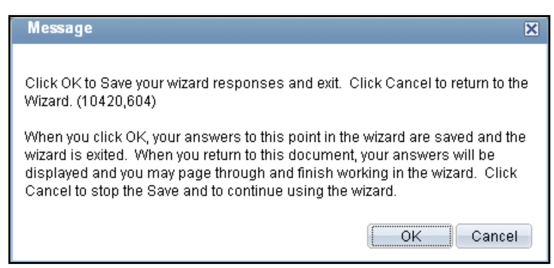
There is a new Source Transaction option on the Add a Document screen, titled Purchase Orders. This option should ***NOT*** be used. The Source Transaction **Ad Hoc** should still be selected when creating Terms and Conditions. Also, the **Description** must now be included on the Add a Document screen instead of the Document Management screen.



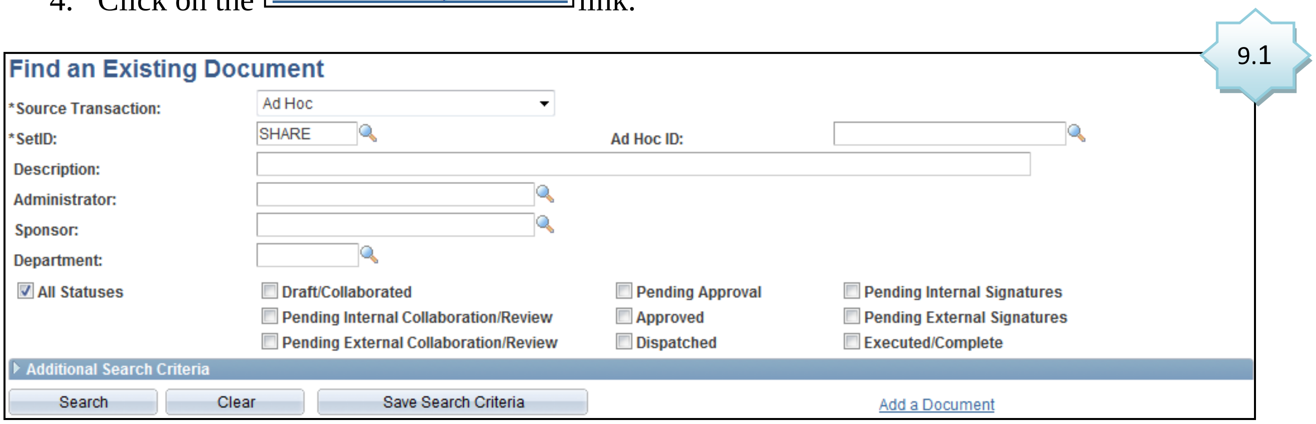
Saving Terms and Conditions

Terms and Conditions now has a feature that allows you to save your progress and continue later. Follow the steps below to save Terms and Conditions.

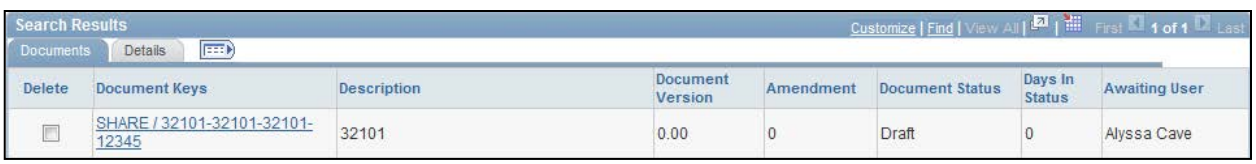
1. Click on Save for Later.
2. Click **OK** on the pop-up message. This will return you to the Create Document screen. You are now able to navigate away without it being necessary to save anything.



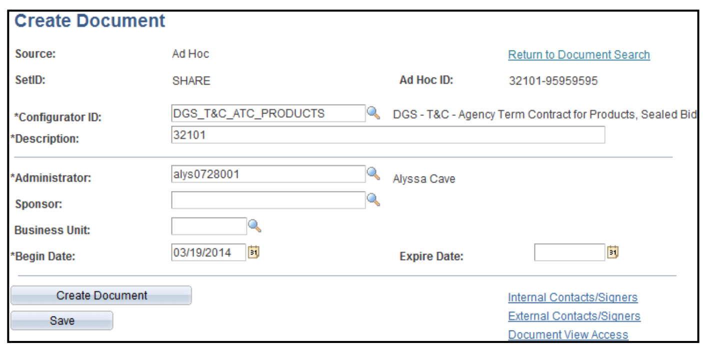
3. Navigate back to the **Add a Document** screen to search for the existing Terms and Conditions.
4. Click on the Find an Existing Document link.

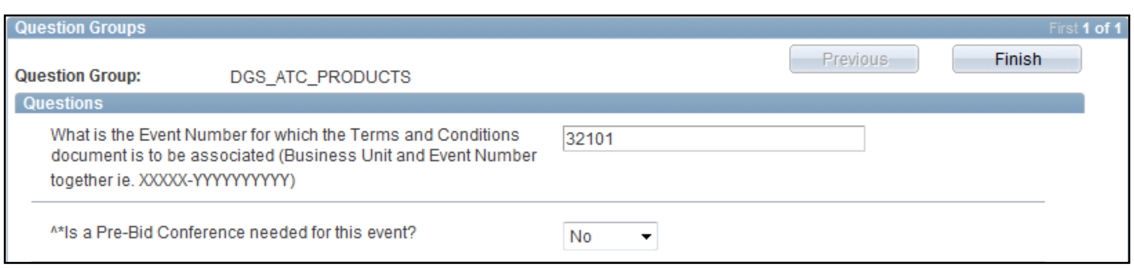


5. Enter the **Ad Hoc ID** of the Terms and Conditions that are being searched for.
6. Click **Search**.

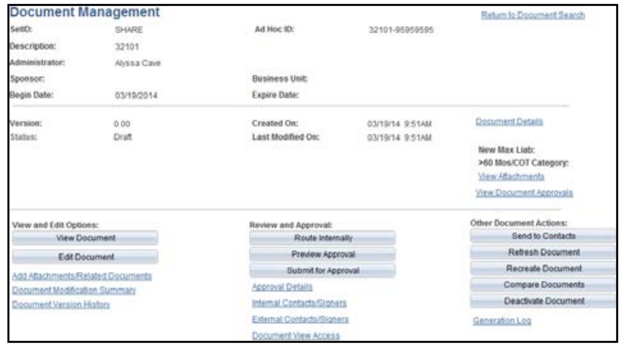


7. Click on the **Document Keys** link to be taken to the Create Document screen.
8. From the Create Document screen, click on **Create Document**.
9. From the Wizard Execution screen, input all missing information into the provided fields.
10. Click **Finish**.





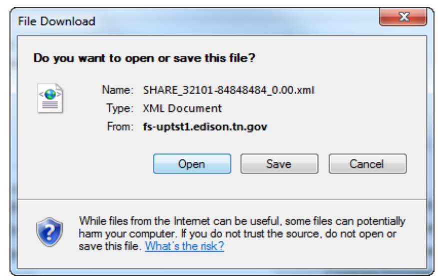
Document Creation

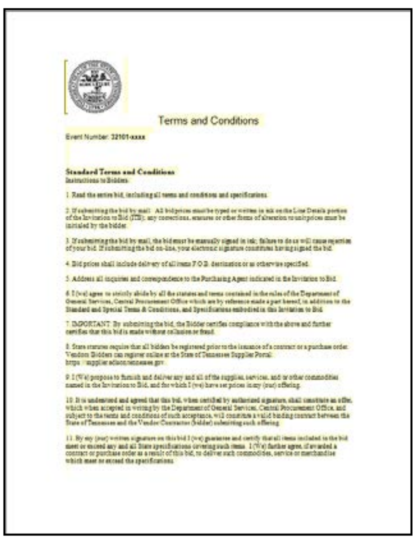


11. From the Document Management screen, click on **View Document**.

HINT *If using Internet Explorer hold down the CTRL key before clicking View Document and Open to avoid receiving pop-up blockers.*

12. Click **Open** to populate the Terms and Conditions. It will no longer be necessary to convert Terms and Conditions to a Word Document. They will now automatically convert. <u>The file will no longer need to be converted to be read; it will automatically save as the file type Word 2003 XML Document.</u> The creator of the Terms and Conditions must manually change the file type if another file type is needed.




Terms and Conditions

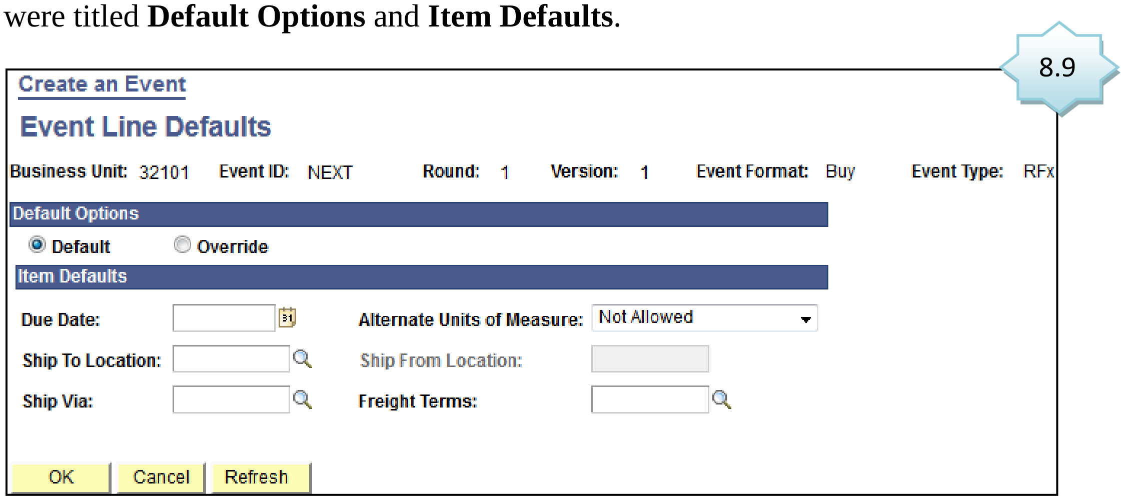
Event Number: 32101-xxxx

Standard Terms and Conditions
Instructions to Bidders

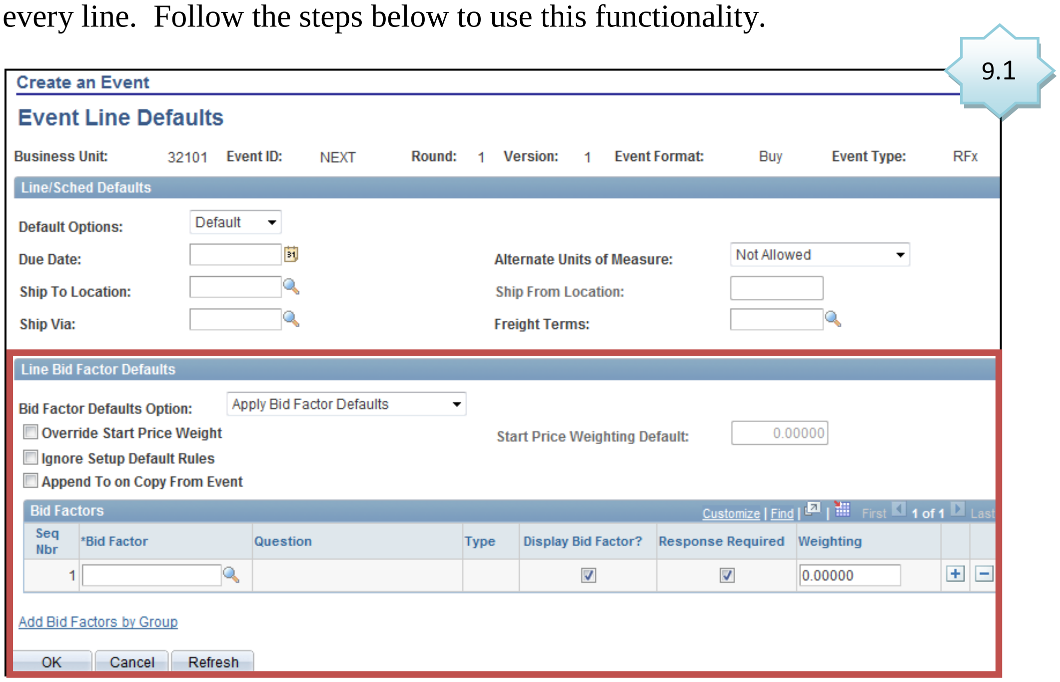
1. Read the entire bid, including all terms and conditions and specifications.

Event Line Defaults

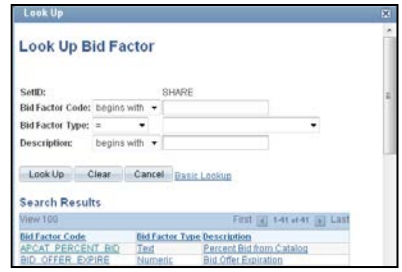
The Event Line Defaults screen was previously limited in functionality. The headers previously were titled **Default Options** and **Item Defaults**.



By using the Line Bid Factor Defaults, the solicitation coordinator can now apply a Bid Factor to every line. Follow the steps below to use this functionality.

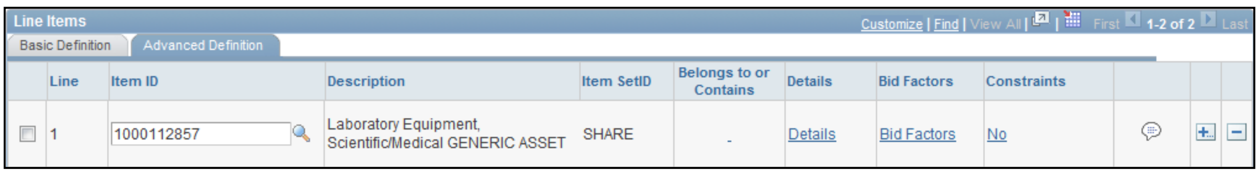


1. Click on the Item Line Defaults link to access the Event Line Defaults screen.
2. Click on the Bid Factor Defaults Option drop-down menu and select **Apply Bid Factor Defaults**.



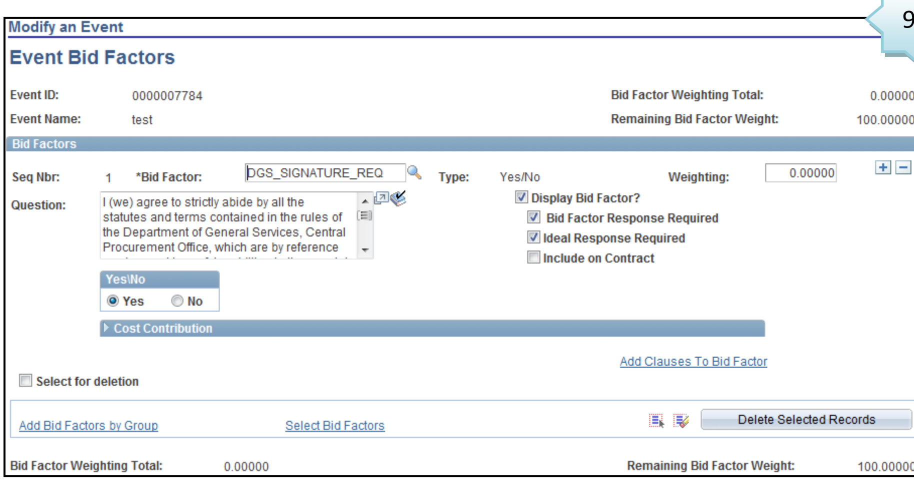
3. To add a Bid Factor click on the Lookup icon next to the empty Bid Factor field.
4. Select the **Bid Factor Code** that is needed for each line. The settings for the bid factor can be controlled from the line. Click the plus icon to add more rows.
5. Click OK to return to the Event Summary screen.

HINT *To confirm the Line Bid Factors click on the **Bid Factor** link on the line under the Advanced Definition tab.*



Bid Factors

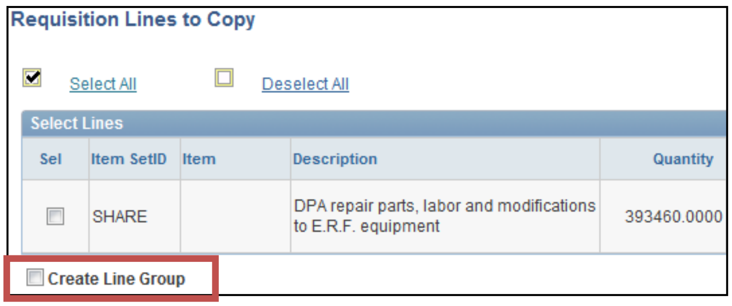
The following Bid Factors will now automatically populate: VNDR RSPNS 01, VNDR RSPNS 02, VNDR RSPNS 03, VNDR RSPNS 04, BID OFFER EXPIRE, REVENUE REQUIRE, and DIVERSITY FORM. Confirm that these bid factors have defaulted for every solicitation.



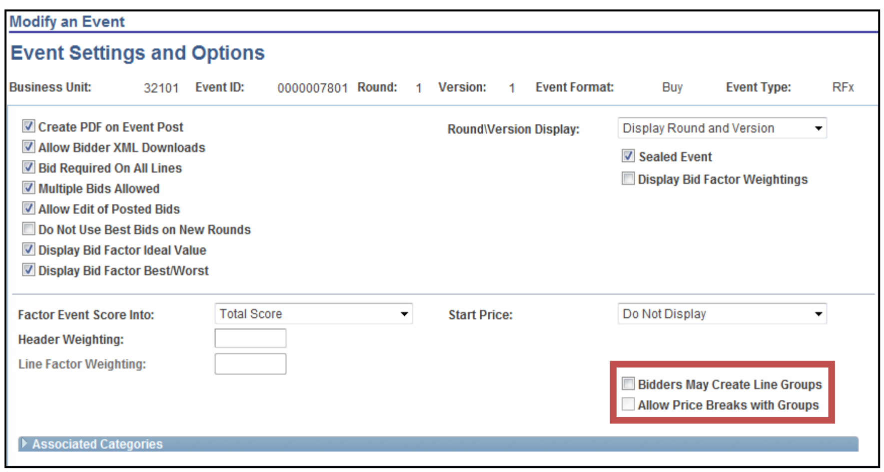
Line Grouping

As users become more familiar with the Edison 9.1 upgrade, they will see multiple opportunities for the solicitation coordinator to configure an Event with groups. ***THIS FUNCTIONALITY SHOULD NOT BE USED.***

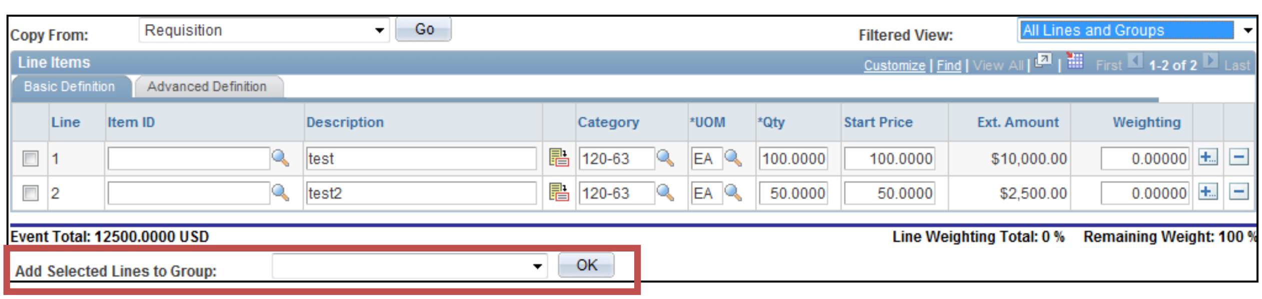
Requisition Lines to Copy



Event Settings and Options

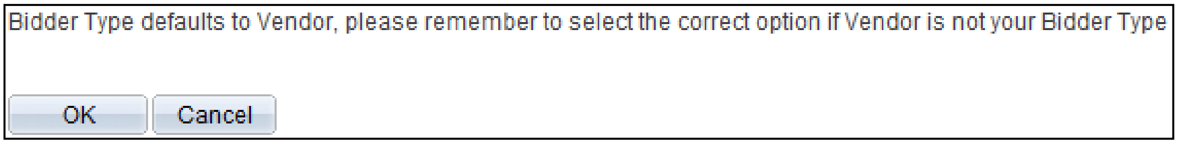


Line Items

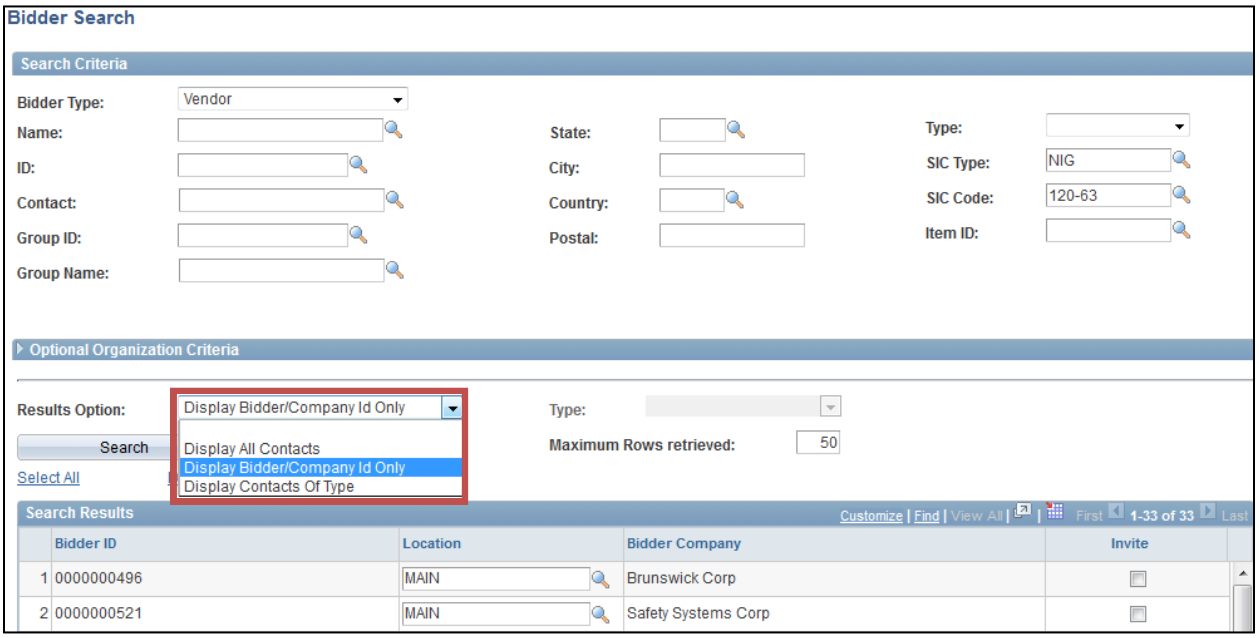


Invite Bidders

When clicking on the Search for Bidders link on the Invite Bidders screen the user will now get the following message before entering the Bidder Search screen. Click **OK** or **Cancel** to continue.

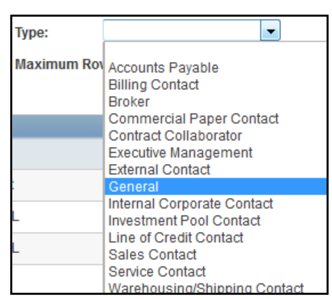


Outlined below is additional functionality that has been added to the Invite Bidders screen.



When searching for bidders/vendors, the option now exists to display various results options. The options from the **Results Option** drop-down menu must be selected before clicking Search. Below is a description of each option.

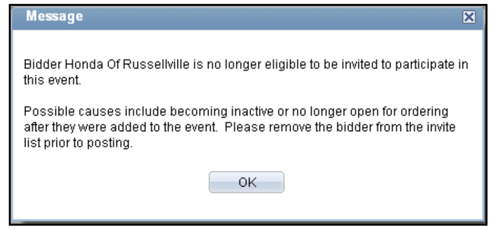
- Display All Contacts – this will display the Bidder ID, Location, Name, and Bidder Company
- Display Bidder/Company Id Only – this will display the Bidder ID, Location, and Bidder Company
- Display Contacts of Type – this option will display the Bidder ID, Location, Name, and Bidder Company by contract type.



HINT *The Display Contacts of Type search option can be used to filter by the type of contact.*

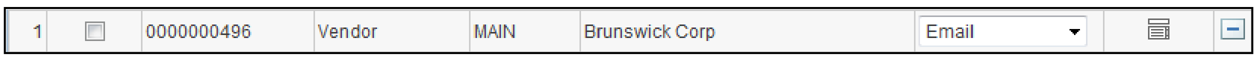
Deleting Ineligible Bidders

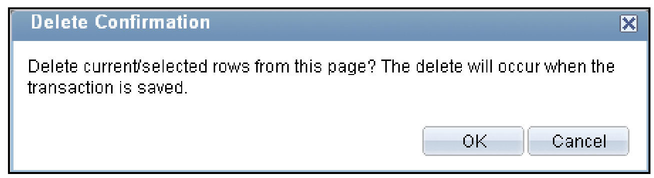
When clicking Post, if one of the Bidders or Vendors on the Bidder Invitation List is no longer active in the system, you will receive the message to the right.



Follow the steps below to remove the Bidder or Vendor from the Invitation List.

1. Click * Bidder Invitations to return to the Invite Bidders screen.
2. Click the View All link to view a complete list of Bidders and Vendors on the Bidder Invitation List. Identify the Bidder that was identified as no longer eligible in the message.



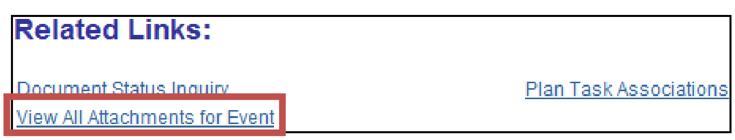


3. Click on the minus icon [−] to remove the Bidder or Vendor that is no longer eligible.
4. Click **OK** to delete the selected row. To confirm the deletion click Save Event Changes.

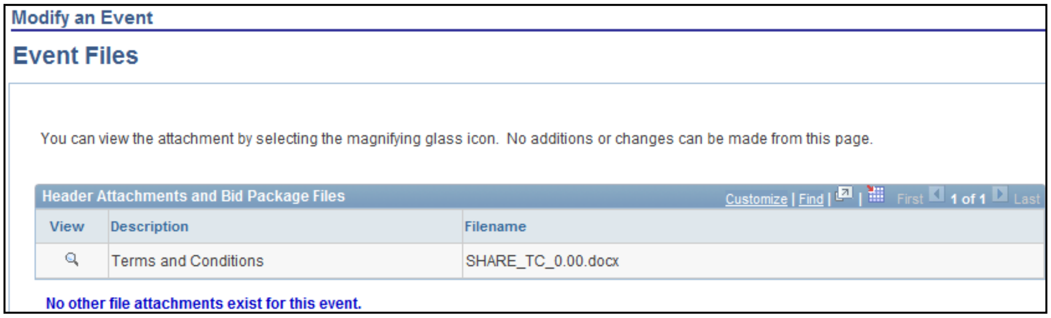
HINT *This message will not be received for undeliverable email, this is only for vendors that have been deemed ineligible.*

View All Attachments for an Event

Additional functionality has been added to the Related Links section of the Event Summary screen. This additional functionality allows the solicitation coordinator to view all attachments for the event. Follow the steps below to utilize this functionality.



1. Click on the **View All Attachments for Event** link to access the Event Files screen.



2. From the Event Files screen, confirm that all necessary attachments have been included.
3. To view the attached documentation, click on the view icon .

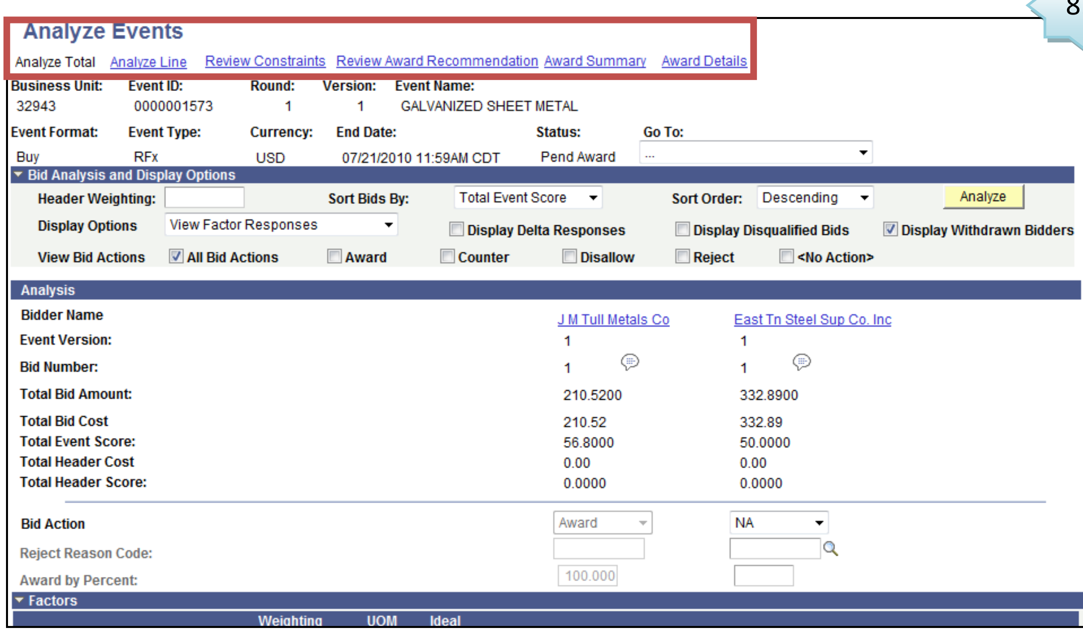
HINT *It may be necessary to hold down the CTRL key while clicking on the view icon. Once the File Download box has populated, choose to either Open or Save the File.*

4. Click on the Return icon to return to the Event Summary screen.

Award an Event

Previously the screen that was used to analyze bids and award an event was the Analyze Events screen.

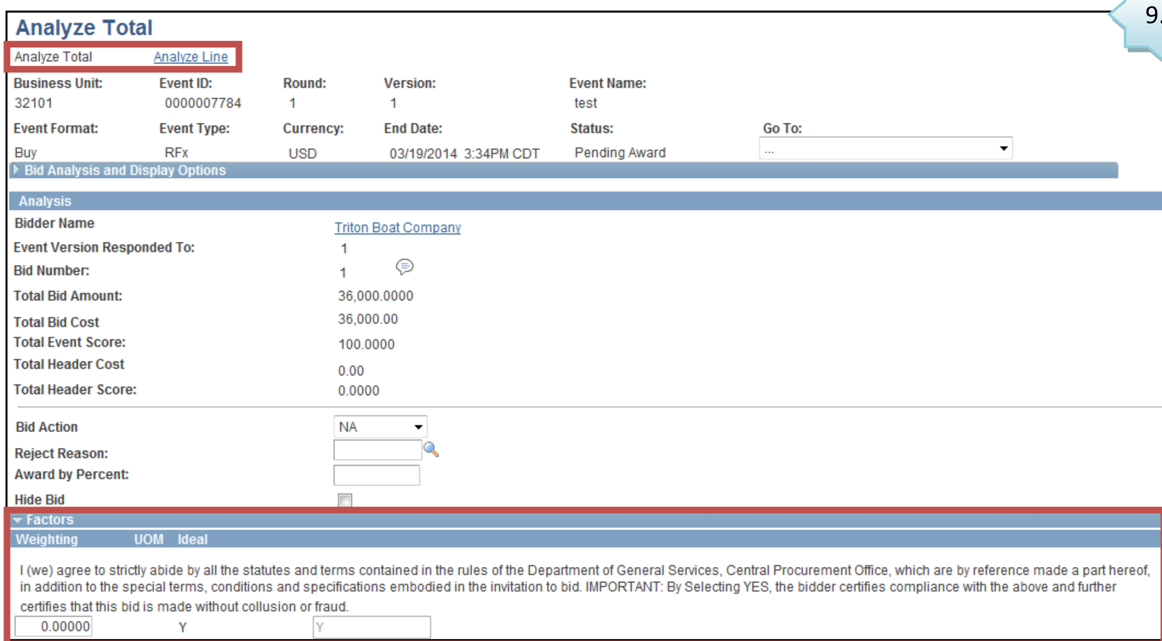
8.9



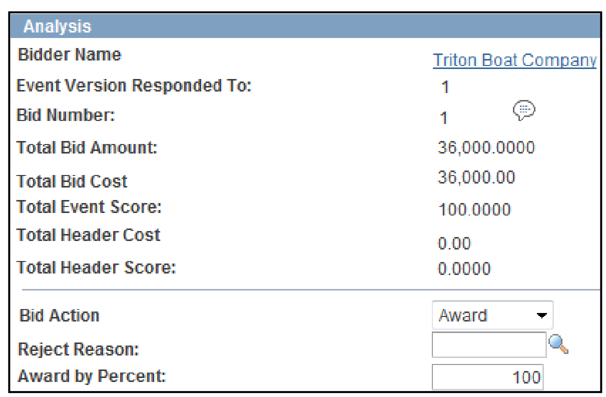
There have been alterations in functionality and changes in the location of screens. Follow the instructions below to award an Event.

HINT *The instructions below do not include analyzing responses, creating a bid analysis export, or adding award comments and justification.   These instructions only outline changes in functionality.*

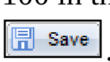
9.1



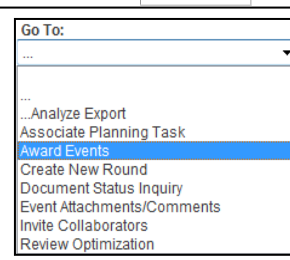
HINT *On the new Analyze Total screen the Bid Factors will not automatically populate. Click the expand section arrow to the left of the Factors header section to reveal the responders answers to the Bid Factor questions.*

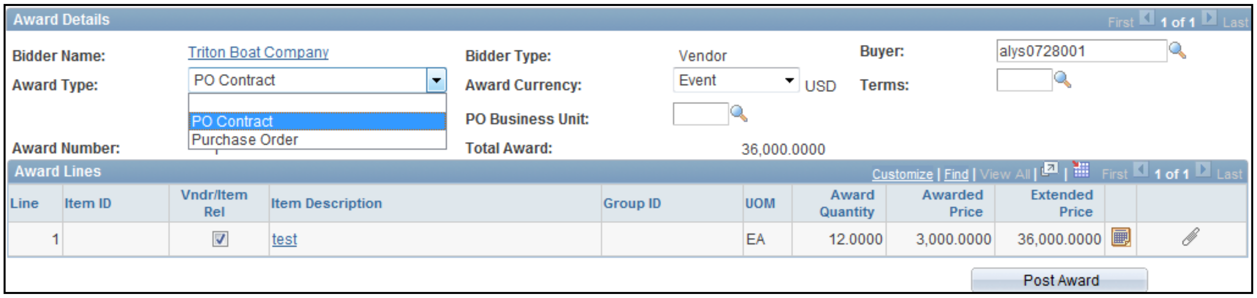


Once the lowest responsive and responsible responder has been identified the award can be made.

1. From the Analysis header section, identify the correct bidder/vendor information and click on the **Bid Action** drop-down menu.
2. Select **Award**.
3. Enter 100 in the **Award by Percent** field.
4. Click 

.
5. Click on the **Go To** drop-down menu and select **Award Events**. A new window containing the **Award Details** screen will populate. This screen is used to post the award and it contains the following tabs: Award Details, Award Summary, and Review Constraints.

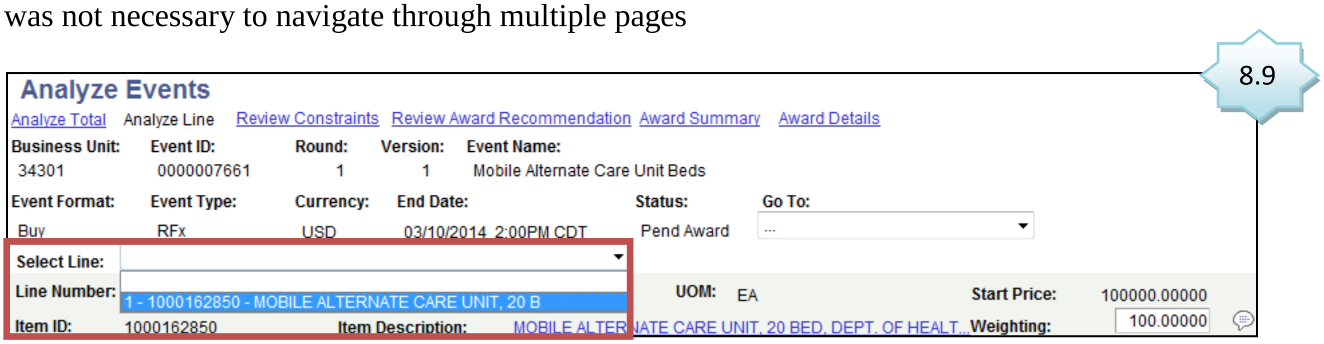




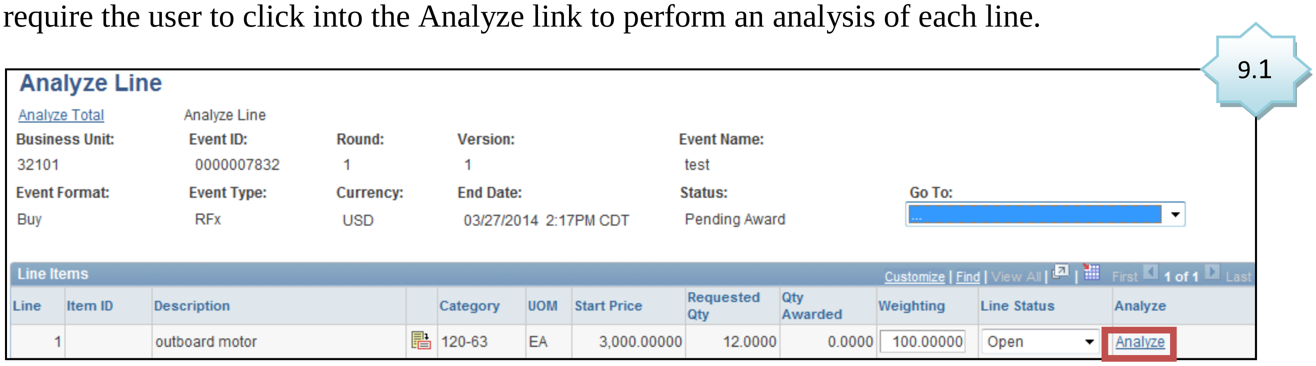
6. Select the **Award Type**. The award choices are now limited to Purchase Orders and PO Contracts.
7. Enter the **PO Business Unit** and click Save.
8. Click **Post Award**. This will populate the Contract Entry Screen or Purchase Order screen.

Analyze Line

Previously each line was accessed by selecting the line from the Select Line drop-down menu. It was not necessary to navigate through multiple pages



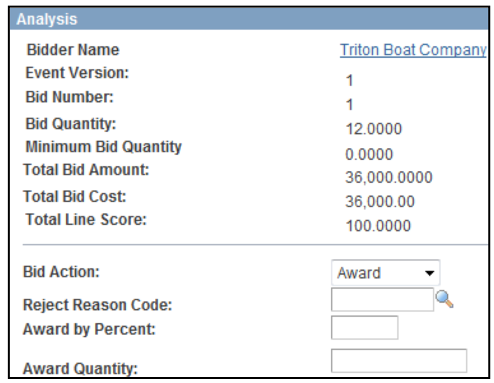
While all lines will now be accessible at once from the Analyze Line screen, the upgrade will require the user to click into the Analyze link to perform an analysis of each line.



Follow the steps provided below to award by line. These steps begin at the Analyze Total screen.

1. Click on the Analyze Line link to go the Analyze Line screen.
2. Identify the line that is being awarded and click on the Analyze link. This will populate all response information for the line.

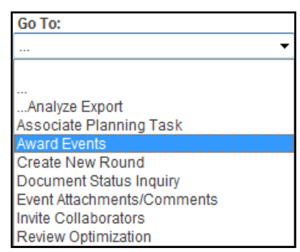
HINT *On the upgraded Analyze Line screen the Line Bid Factors will not automatically populate. It will be necessary to click the expand section arrow to the left of the Factors header section to reveal the responders answers to the line Bid Factor questions.*



3. From the Analysis header section, identify the correct bidder/vendor information and click on the **Bid Action** drop-down menu.
4. Select **Award**.
5. Enter 100 in the **Award by Percent** field.
6. Click Save.
7. Click OK to the main **Analyze Line**.

Repeat steps 2 through 7 for each line.

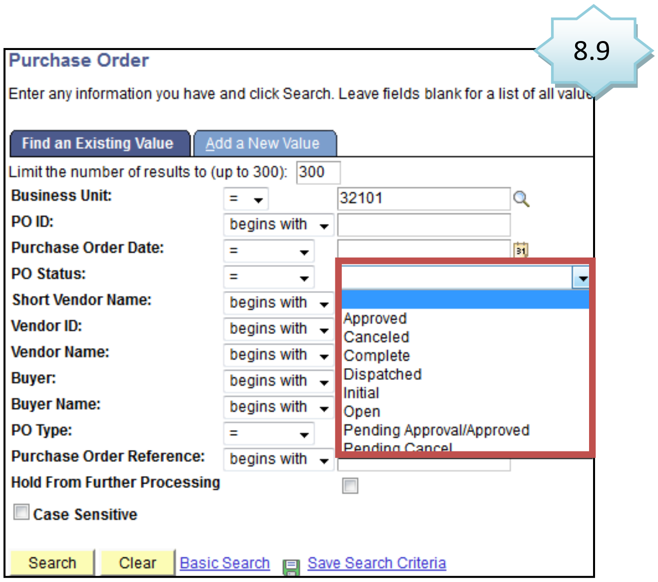
8. Click on the **Go To** drop-down menu and select **Award Events**. A new window containing the **Award Details** screen will populate. This screen is used to post the award and it contains the following tabs: Award Details, Award Summary, and Review Constraints. Follow steps 6 through 8 above to finalize the award process.



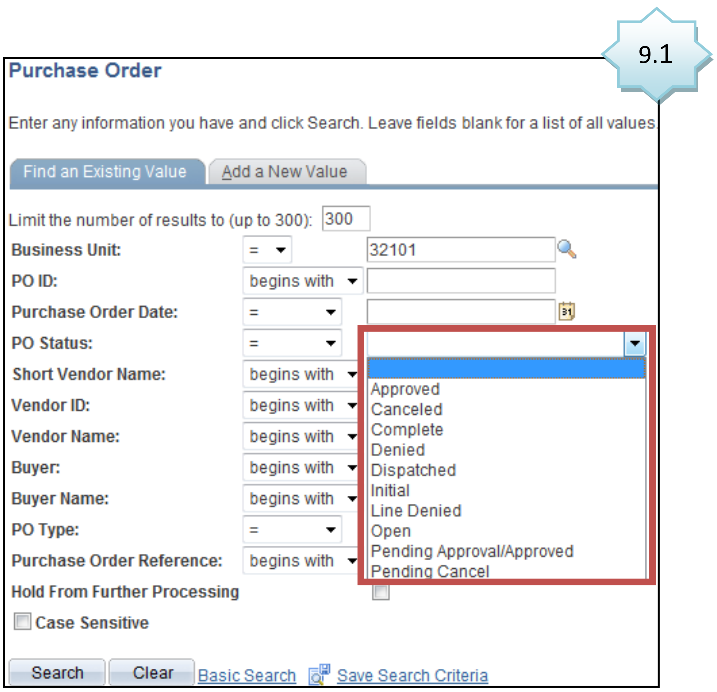
Purchase Orders

Purchase Order Status Options

The previous PO Status search options included the following: Approved, Canceled, Complete, Dispatched, Initial, Open, Pending Approval/Approved, and Pending Cancel.

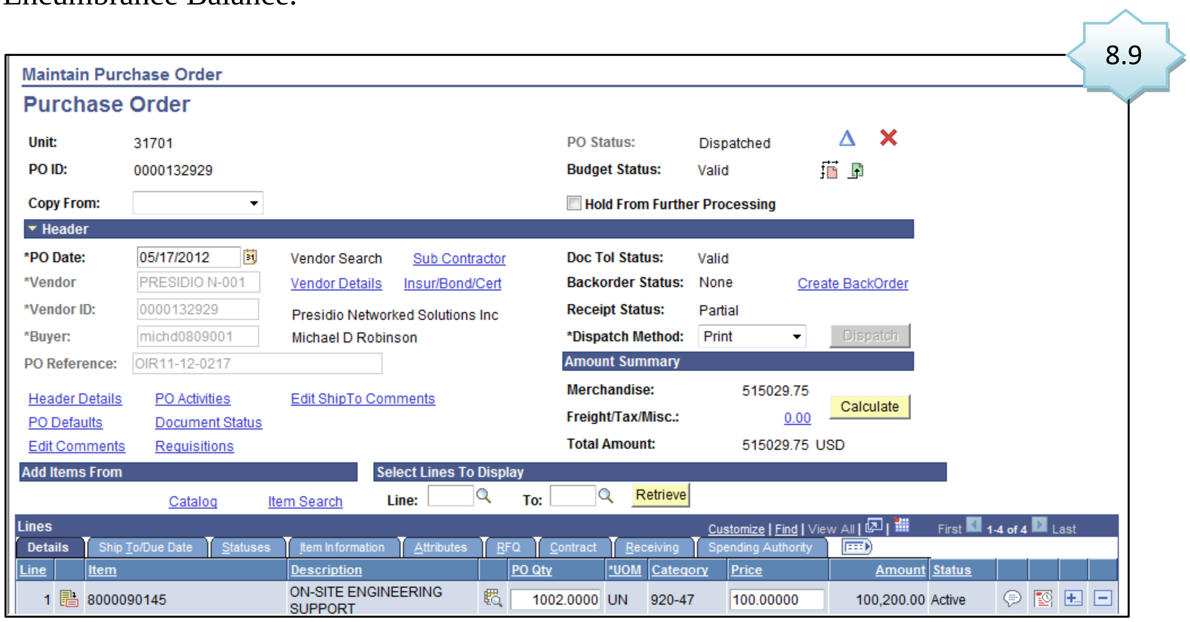


The new options for the PO Status search include Denied and Line Denied.

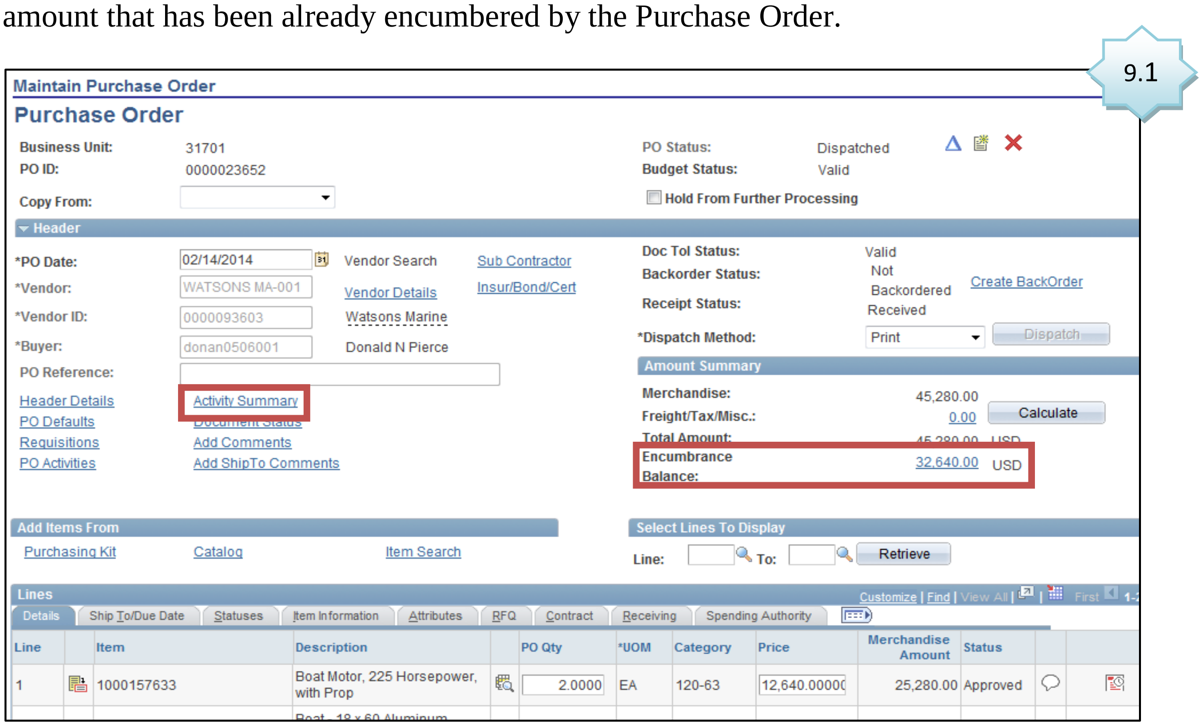


Maintain Purchase Order

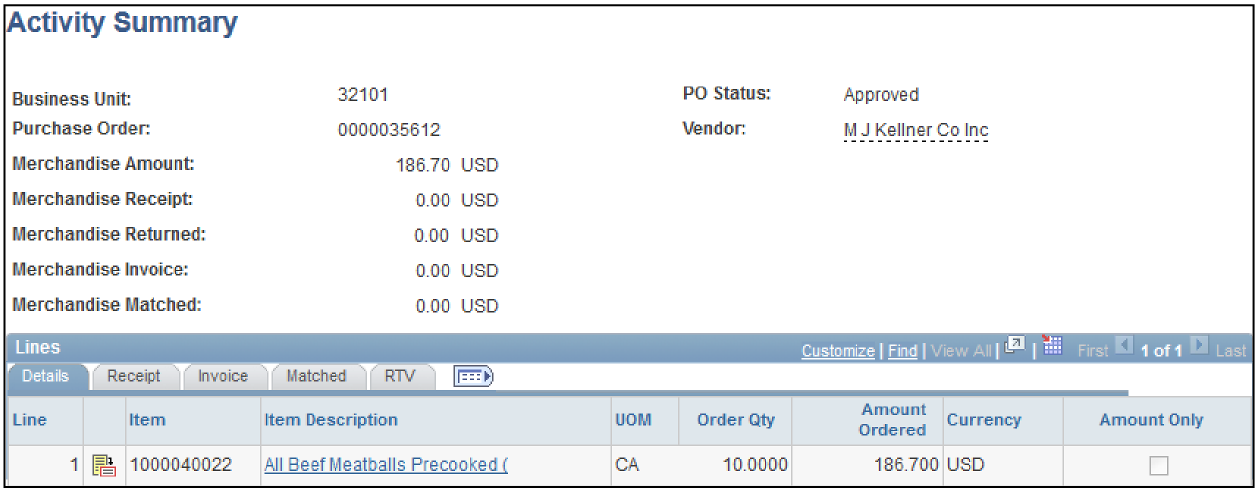
Previously there were no fields on the Maintain Purchase Order screen for Activity Summary or Encumbrance Balance.



There have been two new fields added to the Maintain Purchase Order screen. These fields are Encumbrance Balance and Activity Summary. The Encumbrance Balance field provides the amount that has been already encumbered by the Purchase Order.



The Activity Summary provides a summary of the activity on the Purchase Order.


Activity Summary

Business Unit:	32101	PO Status:	Approved
Purchase Order:	0000035612	Vendor:	M J Kellner Co Inc
Merchandise Amount:	186.70 USD		
Merchandise Receipt:	0.00 USD		
Merchandise Returned:	0.00 USD		
Merchandise Invoice:	0.00 USD		
Merchandise Matched:	0.00 USD		

Lines — Customize | Find | View All | First 1 of 1 Last

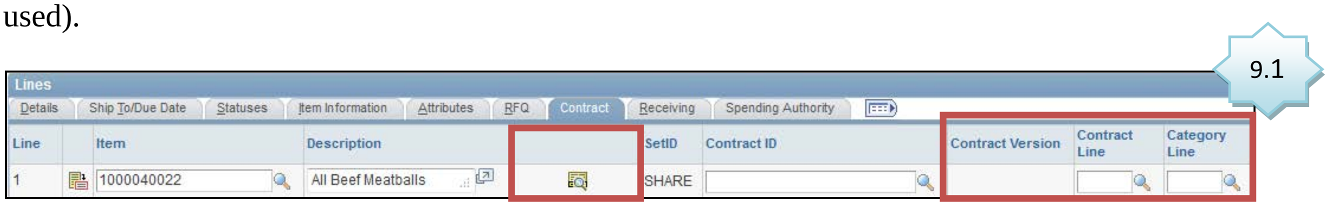
Details | Receipt | Invoice | Matched | RTV

Line		Item	Item Description	UOM	Order Qty	Amount Ordered	Currency	Amount Only
1		1000040022	All Beef Meatballs Precooked (	CA	10.0000	186.700	USD	

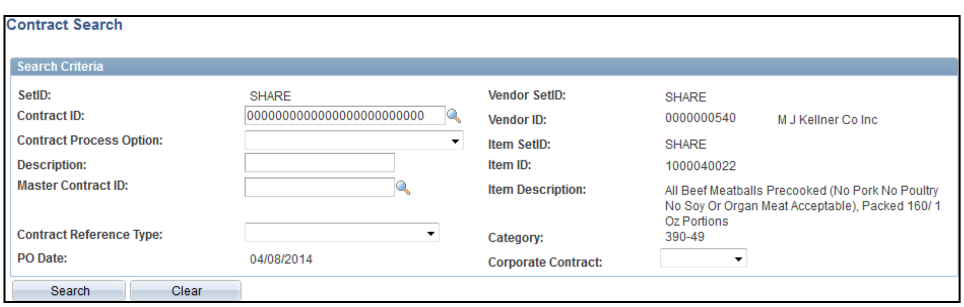
Contract Tab

Previously the Contract tab on the line contained the following fields: Line, Line Details Icon, Item, Description, SetID, ContractID, Contract Line, Release, Milestone Line, GPO ID, GPO Contract, and Rebate ID.

The Contract tab now contains the following additional fields: Contract Search icon, Contract Version (this will be used in the future), and Category Line (this functionality should not be used).



The Contract Search icon can be used to perform an advanced search for the Contract ID.


Contract Search

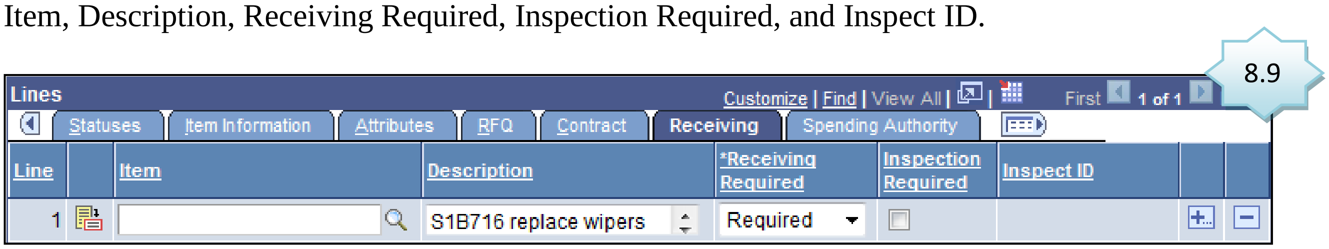
Search Criteria

SetID:	SHARE	Vendor SetID:	SHARE
Contract ID:	0000000000000000000000000	Vendor ID:	0000000540 M J Kellner Co Inc
Contract Process Option:		Item SetID:	SHARE
Description:		Item ID:	1000040022
Master Contract ID:		Item Description:	All Beef Meatballs Precooked (No Pork No Poultry No Soy Or Organ Meat Acceptable), Packed 160/ 1 Oz Portions
Contract Reference Type:		Category:	390-49
PO Date:	04/08/2014	Corporate Contract:	

Search | Clear

Receiving Tab

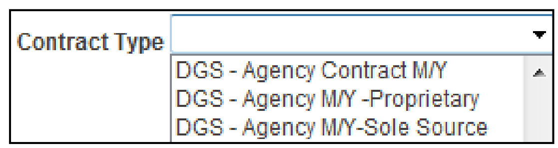
Previously the receiving tab on the line contained the following fields: Line, Line Details icon, Item, Description, Receiving Required, Inspection Required, and Inspect ID.



This tab now has a Close Short checkbox. ***This functionality is not currently being used.***

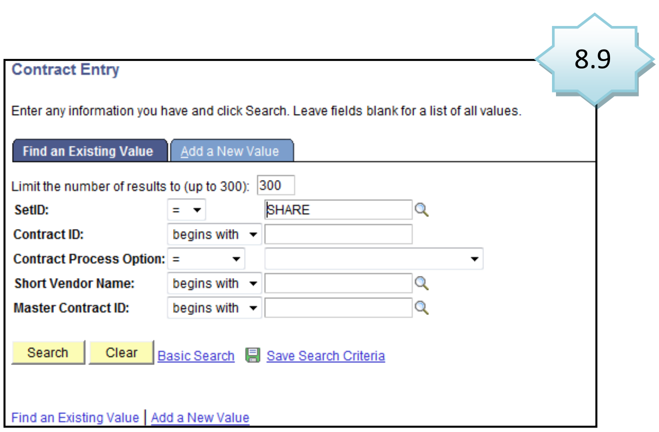
Saving a Contract

In order to save a Contract all the information that is needed is a line and a Vendor ID. It will be necessary to save a contract before the Contract Type drop-down menu will populate.

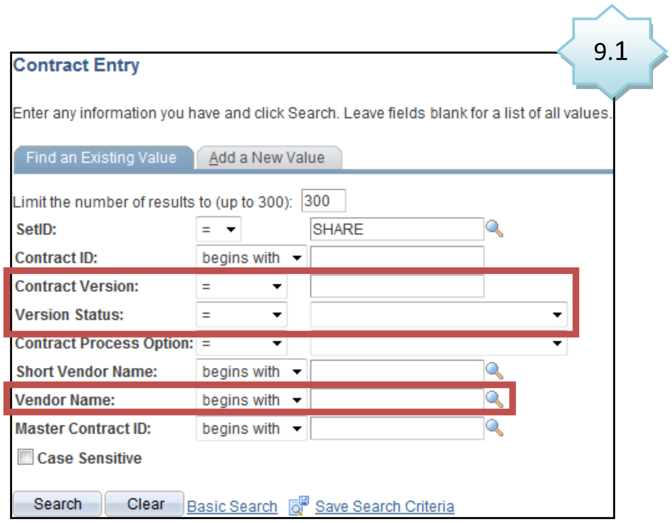


Contract Search Options

Additional search options have been added to the Contract Entry screen under the Find an Existing Value tab. The user is now able to search Contract Version, Version Status and Vendor Name.



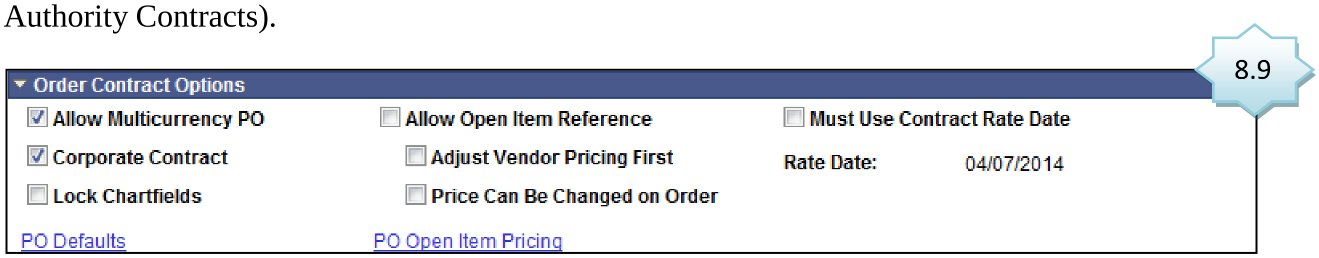
- Contract Version – This is the Version of the contract that is being searched for (This will be applicable with future functionality).
- Version Status – The status will either be Current, Draft or History (This will be applicable with future functionality).
- Vendor Name – This feature allows the user to search by the entire name of the Vendor.



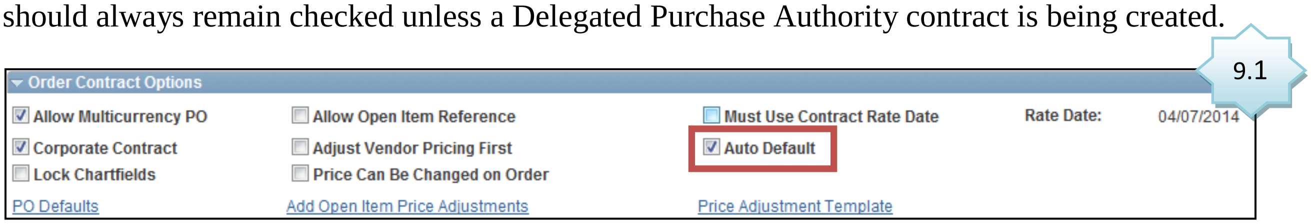
HINT *In order to make the search case sensitive check the* Case Sensitive *checkbox before clicking* ***Search****.*

Order Contract Options

The previous functionality did not allow the user to indicate in the contract if the Vendor or the pricing was not already determined (this functionality is only applicable for Delegated Purchase Authority Contracts).

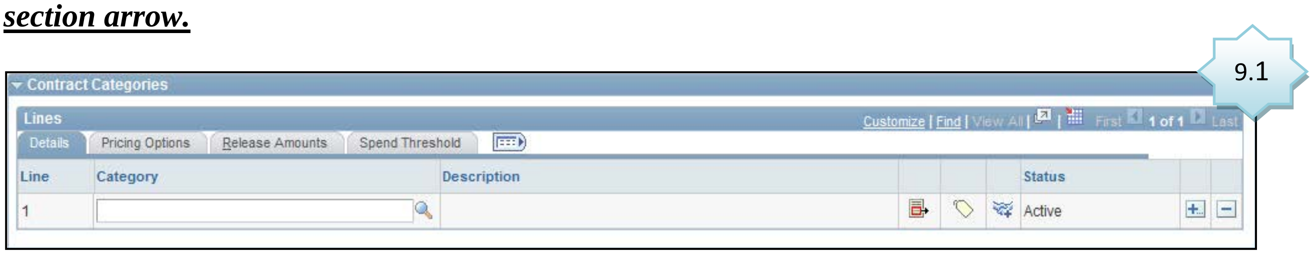


The upgraded Order Contract Options now has an Auto Default checkbox. This checkbox should always remain checked unless a Delegated Purchase Authority contract is being created.



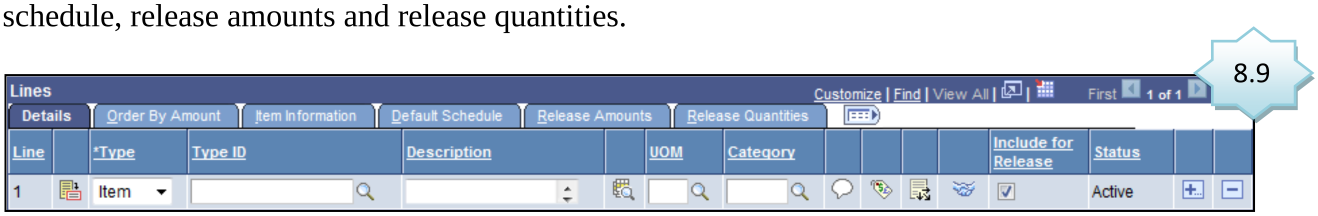
Contract Categories

This functionality is not currently being used. To hide this functionality click on the collapse section arrow.

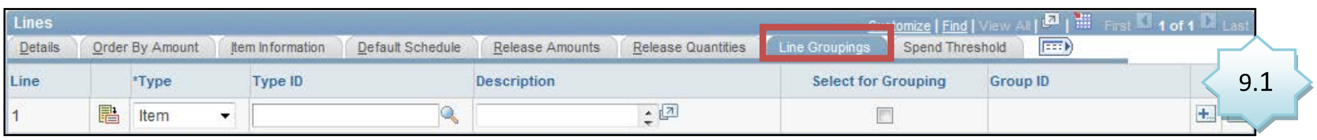


Contract Line Tabs

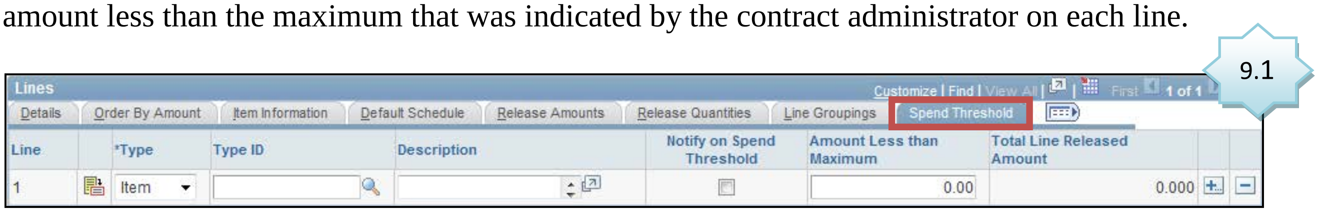
The contract line tabs allow the contract creator to control the usage of the contract line by line. The previous functionality included: details, order by amount, item information, default schedule, release amounts and release quantities.



The Line Groupings tab should NOT be used.



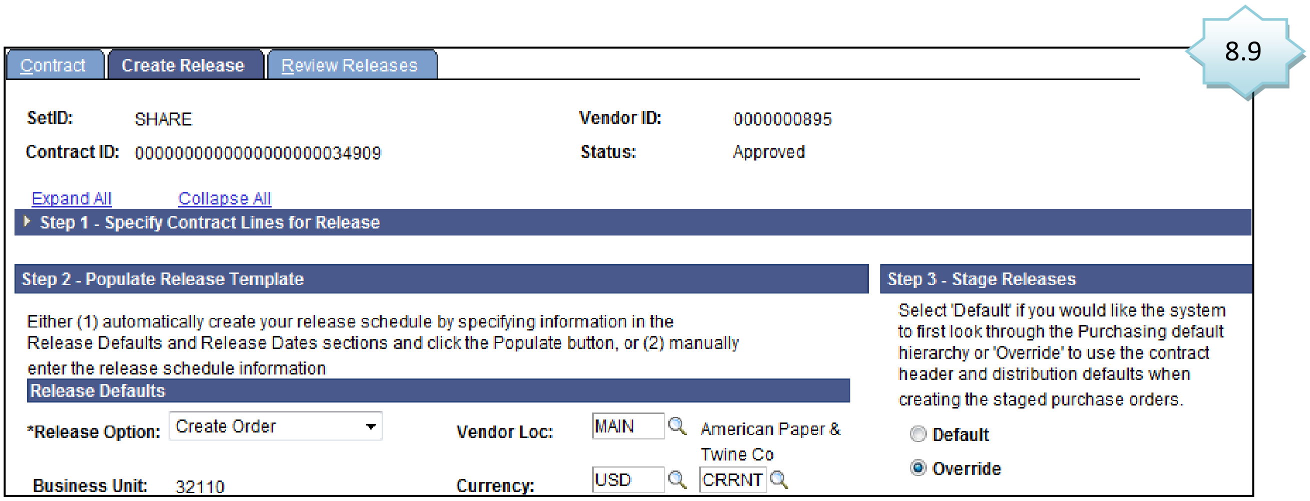
The spend threshold feature allows users to be notified when a specific line has reached the amount less than the maximum that was indicated by the contract administrator on each line.



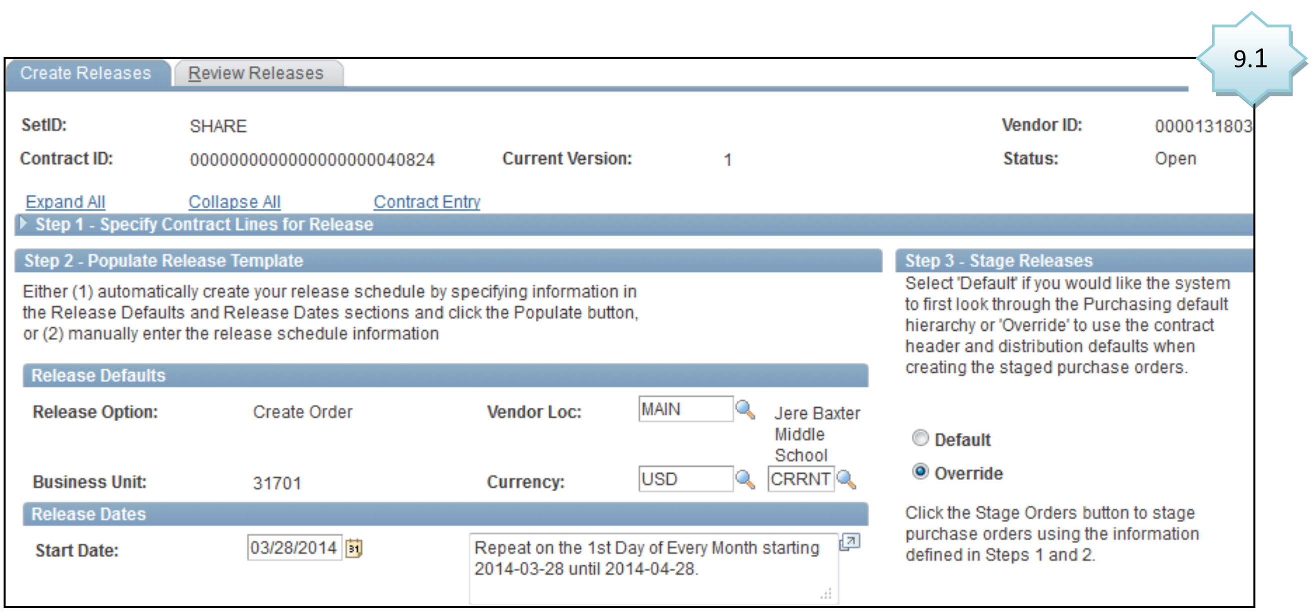
HINT *This feature may be applicable when monitoring fiscal year spend.*

Contract Release

The navigation for the Contract Release function has changed. Contract Releases were previously located under a tab at the top of the Contract Entry screen.

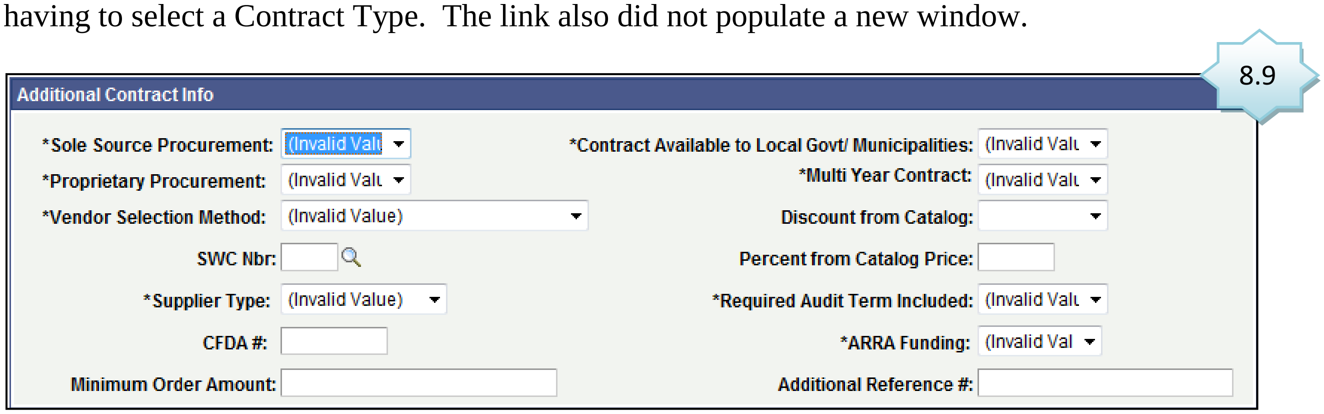


Contract releases can now be accessed by clicking on the Contract Releases link in the Header section of the contract.

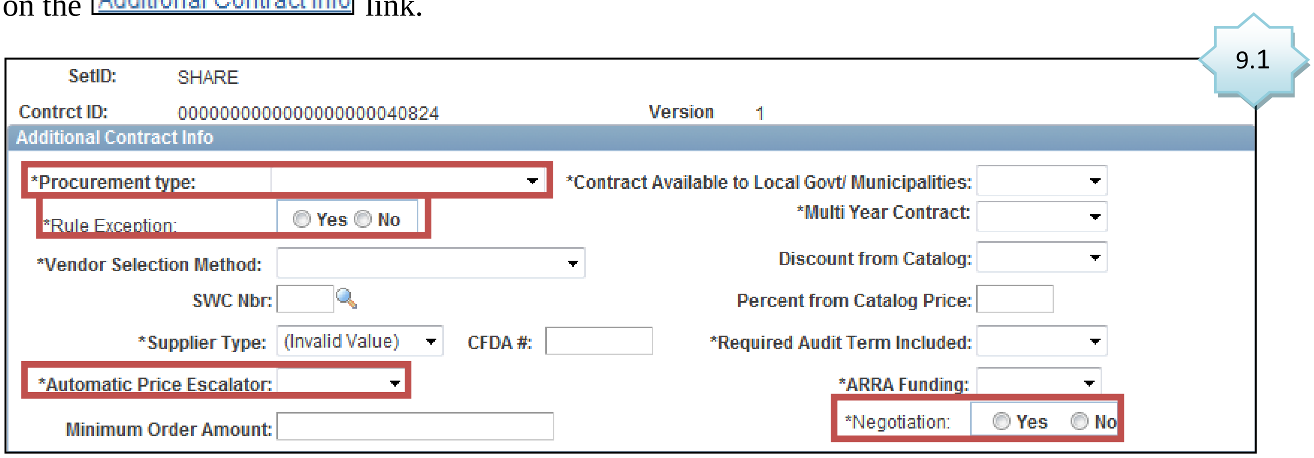


Additional Contract Info

Previously the Additional Contract Info link was visible on the Contract Entry screen without having to select a Contract Type. The link also did not populate a new window.



The Contract Type must now be chosen before the Additional Contract Info link will appear. Once the Contract Type has been selected a window will populate with the Additional Contract Info screen. The Additional Contract Info screen can be accessed again at any time by clicking on the Additional Contract Info link.



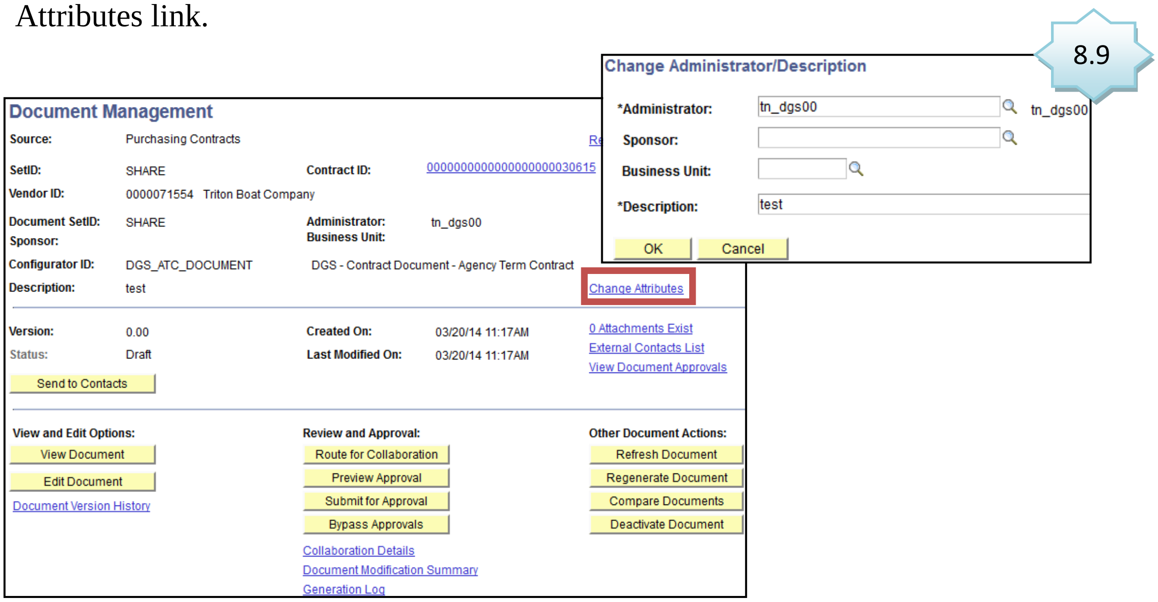
Outlined below is an explanation of the fields contained in Additional Contract Info.

- Procurement Type – Indicate the competitive nature of the solicitation by selecting Sole Source, Proprietary, or Neither.
- Rule Exception – Indicate whether a Rule Exception Request was filed and approved to revise contract language explicitly required by service contracting rules.
- Automatic Price Escalator – This option allows for price escalation in the contract.
- Negotiation – This indicates whether the pricing or Terms and Conditions of the contract was reached through negotiation. **(Negotiation should only be done by the CPO.)**

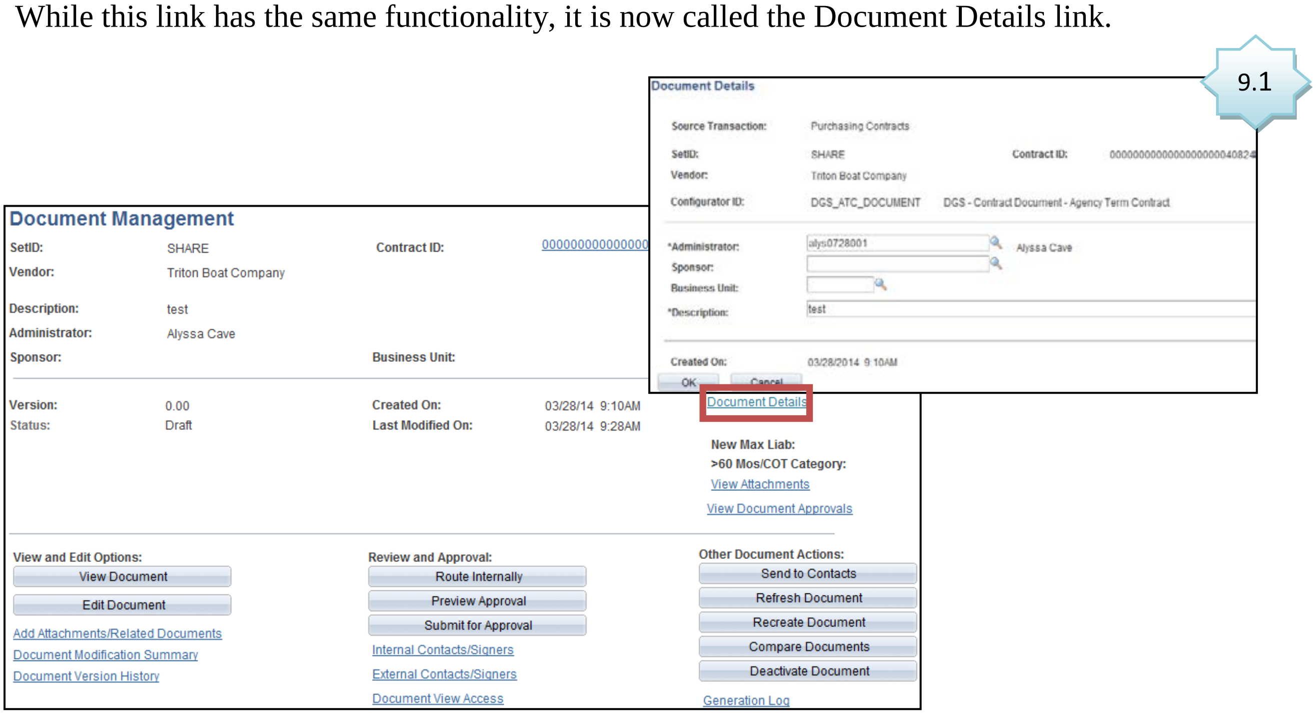
HINT *Click the Save icon* Save *and click the* X *close icon to exit the screen and return to the Contract Entry screen.*

Document Details

Previously the link to change the administrator of the contract document was called the Change Attributes link.

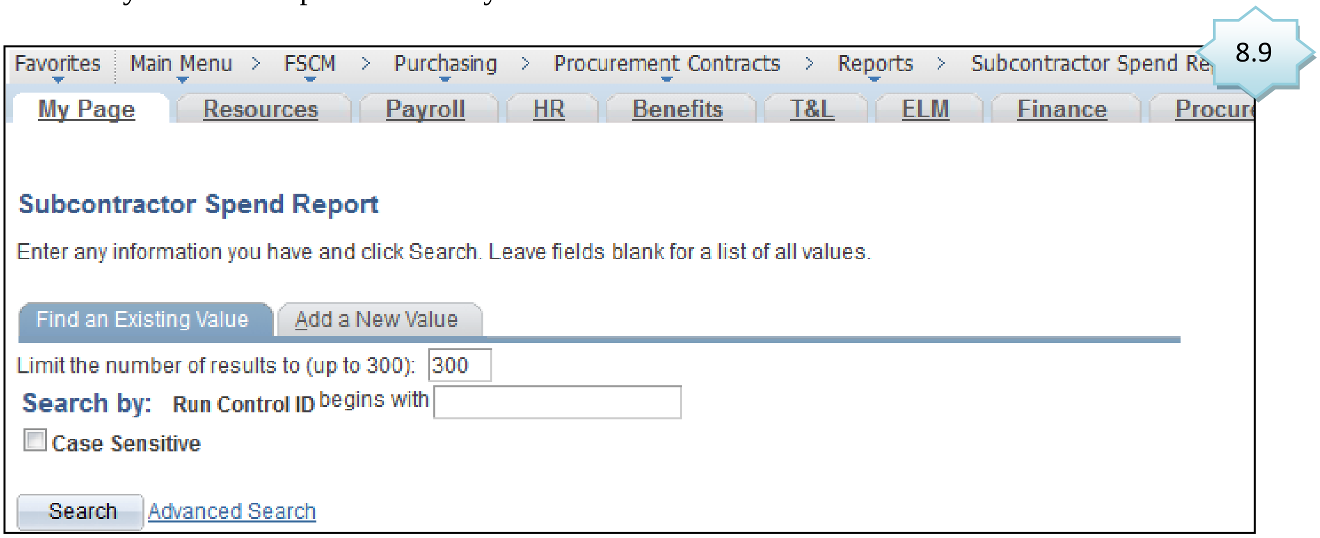


While this link has the same functionality, it is now called the Document Details link.



Contract Reports

Previously Contract Reports were only located in the Procurement Contracts section.

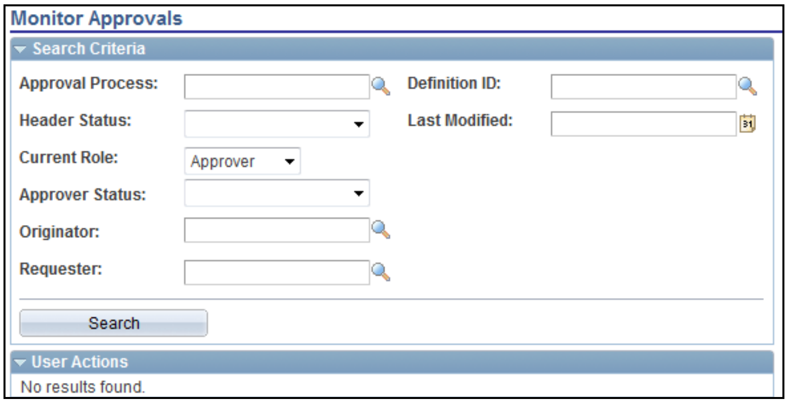


Contract Reports are now also located in the Supplier Contracts section.

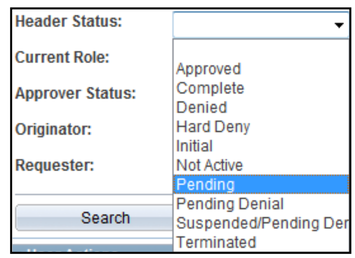
FSCM User Monitor

The functionality of FSCM User Monitor is similar to that of FSCM Worklist, but the User Monitor feature may allow the user to search and approve more quickly. Follow the navigation below to access FSCM User Monitor.

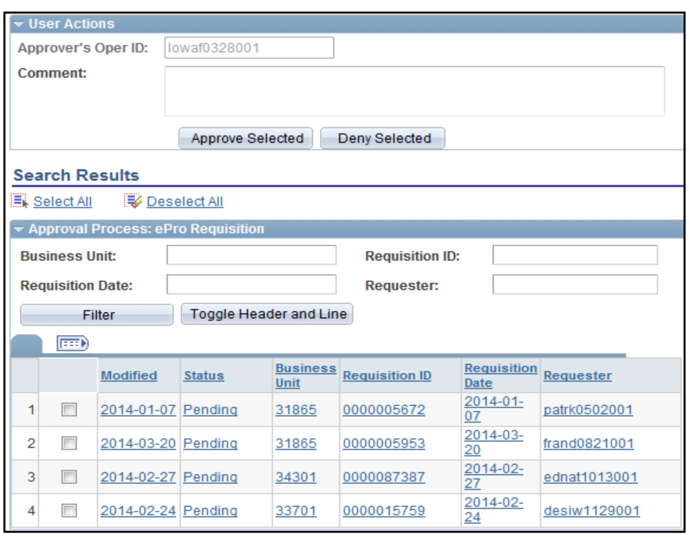
1. Click **Main Menu**.
2. Click **Worklist**.
3. Click **FSCM User Monitor**.



HINT *The Process ID **Document** will search for any necessary contract approvals.*

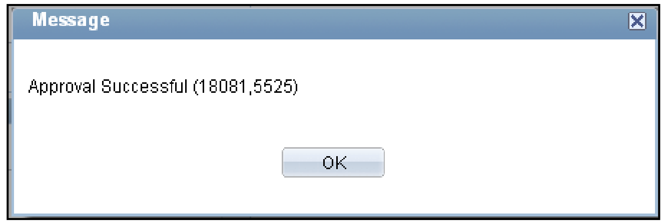


4. To select an action click the look up icon next to the **Approval Process** field.
5. Select the **Process ID** that you are approving.
6. Select a **Header Status** from the drop-down menu. Most often the status that users are seeking is **Pending**.
7. Click **Search**.
8. Select the items needing approval by clicking the check box next to each item.



HINT *Use the Approval Process header section to filter the search results.*

9. Click the on the **Approve Selected** button to approve all previously chosen documents.
10. A confirmation message will generate saying that the approval was successful. Click **OK**.



Additional Functionality

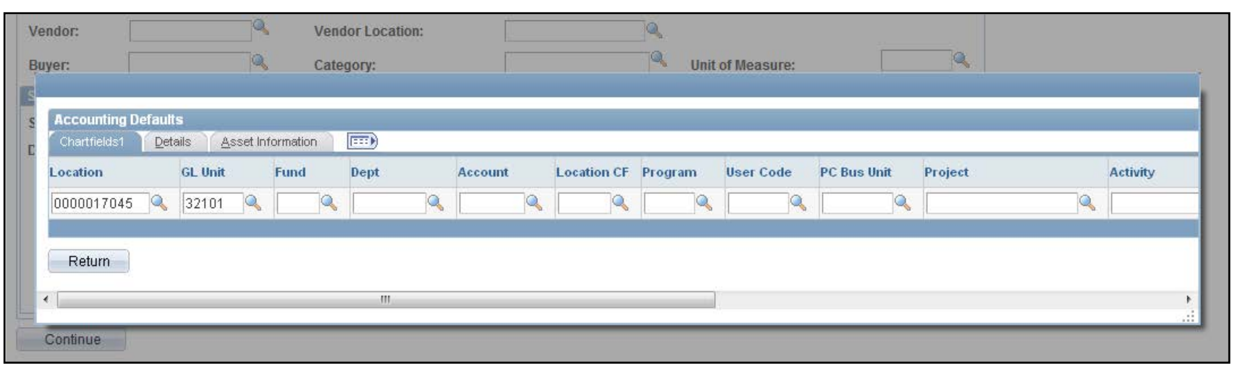
Outlined below are additional pieces of functionality that will impact the user throughout all modules in Edison.

- Edison 9.1 will support up to Internet Explorer 8.

- Password changes will need to meet new criteria: Your new password must be at least eight characters in length and contain at least one number, one capital letter, one special character, such as ! @ # $ % ^ & * ( ) +, and at least one capital letter.

- Home Page Favorites and My Links will not be transferred into Edison 9.1. Users will have to re-create both of these once the upgrade takes place.

- Two new help icons are located throughout the 9.1 modules. The help icon , when clicked will provide information about the functionality on the page. Clicking on the zoom icon  will populate a pop-up with an expanded view of the field that is being worked in. Click the **Return** button to return to the previous screen.



Upcoming Functionality

Additional functionality is forthcoming that will allow contract administrators to create and maintain multiple versions of a contract. This allows for contracts to be approved and active, while still having the ability modify draft versions.