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# Government of the District of Columbia - *Sourcing and Contracts Project*

**PASS User Forum**  
**June 22, 2010**  
***1 – 3 pm***

# Agenda

## Ariba Sourcing and Contracts Implementation

Update on the Contracts Roll Out

Highlights on Changes to the Ordering Process

Contract Administrators

Ordering from a Contract

Dashboard

Sourcing Module

Questions?

# ***WHAT IS HAPPENING IN CONTRACTS?***

# The Contracts Module Went Live June 7<sup>th</sup>!

- Catalogs are back!
  - When you access Buyer you can search for items and requisition them from a catalog.
- When you order from a catalog you will no longer require involvement or approval from OCP/Independent Buyers.
- District-wide contracts that are available now include contracts for:
  - Business Cards
  - Desktops/ Laptops
- Current OCP Contracts are in the process of being published in the Contracts Module.
- In FY11 POs will be linked to contracts.

# Changes to the Ordering Process

- Why can't the requisitioner select the supplier for a non catalog requisition?
  - ❑ OCP/Independent Buyers will determine the best vendor based on the procurement process
  - ❑ The suggested supplier can be noted in the comments field
- What if the item is in a catalog and the requisitioner doesn't order from it?
  - ❑ The Contract Specialist will deny the order and sending it back to the agency with comments.
  - ❑ The Contracting Specialist will provide the details for the catalog from which the item can be ordered.

# Changes to the Ordering Process

- For orders against OCP created contracts, OCP will not be added to the approval flow.
  - The approval flows for Independent Agencies have not been changed

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# ***CONTRACT ADMINISTRATORS***

# Contract Administrator Role

- Previously known as COTRs
- All Contract Administrators Received Logins to PASS
  - ❑ You need to be added to the contract by the Contract Specialist before you can view contract information.
  - ❑ You will be able to view key information about the contract e.g., contract expiration date, subcontractor information, etc.
- Details on Contract Administrator Training to announced shortly.
- Never been a Contract Administrator; Sign up for Training offered monthly:

<http://ocp.in.dc.gov/ocp/cwp/view.asp?a=3&q=501322>



# ***ORDERING FROM A CONTRACT***

# Ordering from a Contract

- Line item information is fixed and pushed into a catalog (only enter quantity)
- Requisitioner can search for an item and place an order
- Contract number linked to the purchase order (PO)
- OCP not on the approval flow
- The Approval Flow for Independent Agencies has not changed

# Buyer Page

The screenshot shows the PASS Buyer web application interface. At the top, there is a navigation bar with buttons for Home, Help, and Logout. Below this, the user's name (Jeanne Sheridan) and several toggle options (Preferences, Toggle Tips, Toggle Currency) are visible. The main content area features a central graphic with the word "Buyer" in large blue letters, a red and white diamond shape with three stars, and a circular flow diagram with nodes labeled "Status", "Approve", "Receive", and "Explore". A "Create" node is also present. A "DC Links" box is overlaid on the right side of the main content, containing links for "DC Website", "PASS Help Page (Google login required)", "ASMP Home Page", and "Training FAQs". On the left side, there is a sidebar menu with categories: "To Do" (Approve Requests: 2, Watch Requests: 0), "Status" (Composing: 5, Submitted: 4, Approved: 231, Sourcing: 0, Denied: 5), "Create" (Requisition, Company eForm), "Explore" (Searches, Catalogs, Folders, Contracts, Administrator), "Report" (Reports), "Receive" (Purchase Orders), "Reconcile" (Invoices: 0, Charges), and "Spend Management" (My Dashboard). The "Create" category is highlighted with a black box. The browser's status bar at the bottom shows "Internet" and "100%" zoom.

Users log into PASS Buyer like they normally would. Clicking on the “Create Requisition” the user can begin to purchase from the Contract/Catalog.

# Add Title Page

Debug Info | AQL Queries: 7 | Home | Help | Logout

Jeanne Sheridan | Preferences | Toggle Tips | Toggle Currency

Shopping Cart | RQ693865: Untitled Requisition | Items: 0 | Total: \$0.00USD | Next > | Exit

## 1 Add Title Requisition

Enter the requisition title and change one or more of the other requisition fields, if desired. If you are creating the requisition on behalf of another user, the user's accounting, shipping, and delivery information apply. [How To](#)

Title:

Preparer's Agency:

On Behalf Of:

Delay Purchase Until: ?

ePIF#:

Funds Status: No Funds Committed

Planned Procurement:

Retainage Flag:

Procurement Method:

Contract Type:

Next > | Exit

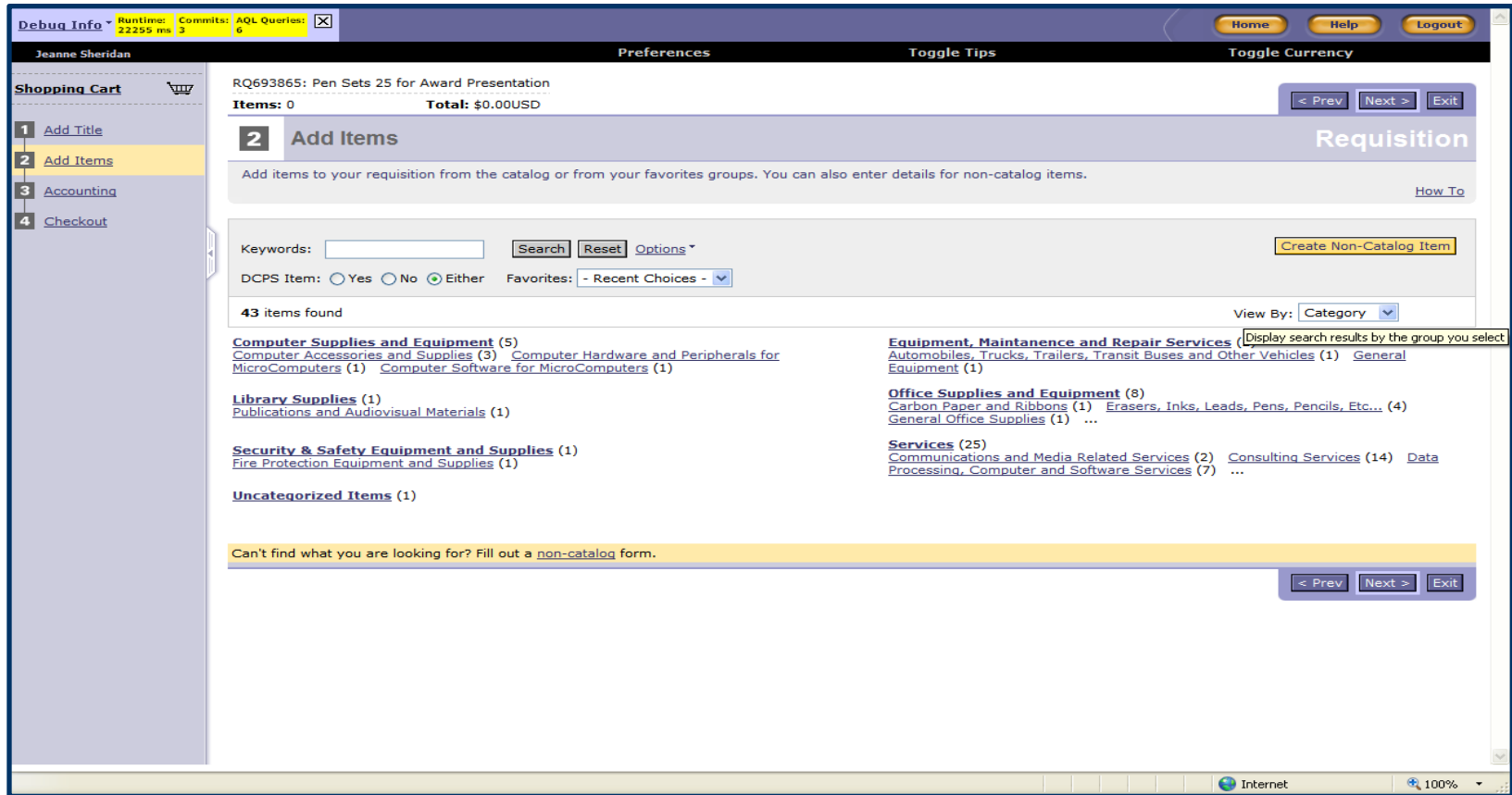
Enter the requisition title and change one or more of the requisition fields if desired. The title should be specific. Click "Next" when Finished.

# Ways to Search for an Item

The screenshot displays a procurement application interface. At the top, there is a navigation bar with 'Home', 'Help', and 'Logout' buttons. Below this, a 'Shopping Cart' sidebar on the left shows a list of steps: '1 Add Title', '2 Add Items' (highlighted), '3 Accounting', and '4 Checkout'. The main content area is titled 'RQ693980: Pen Sets for Award Ceromyony' and shows 'Items: 0' and 'Total: \$0.00USD'. A search bar is present with 'Keywords:' and 'Search' and 'Reset' buttons. Below the search bar, there are radio buttons for 'DCPS Item: Yes No Either' and a 'Favorites:' section. A list of search results is shown, including categories like 'Automotive & Transportation Equipment and Supplies', 'Computer Supplies and Equipment', 'Library Supplies', 'School and Recreational Supplies', and 'Services'. A 'Preferences' dialog box is open over the search results, showing options for 'Keywords' (And, Or, Exact Phrase, Exclude Words), 'Additional' (DCPS Item, LSDBE, Expiration Date, Contract Number, Effective Date, EPP, Supplier, Supplier Part #, Manufacturer, Mfg. Part #, Price, ETA, Type Name, Language), 'Custom' (Favorites, Contract), and 'Views' (Show all search options, Hide search options). A 'Saved searches' section is also visible. At the bottom of the search results, there is a message: 'Can't find what you are looking for? Fill out a non-catalog form.' The interface also includes a 'Requisition' section with 'Prev', 'Next', and 'Exit' buttons, and a 'Create Non-Catalog Item' button. The browser status bar at the bottom shows 'Internet' and '100%' zoom.

There are multiple ways to search for a product / service. It's recommended to use the Key Word Search for the commodity or item / service description.

# Search to Add Items



You can Search for Items by typing in a “Keyword” such as Pen Sets in the keyword box or use the Catalog “Office Supplies and Equipment” to find your Item. When Finished click “Next”.

# Locating the Item

The screenshot displays the PASS web application interface. At the top, the user is identified as Jeanne Sheridan. The main navigation bar includes 'Home', 'Help', and 'Logout' buttons. The left sidebar shows a 'Shopping Cart' icon and a menu with four items: '1 Add Title', '2 Add Items' (highlighted), '3 Accounting', and '4 Checkout'. The main content area shows a requisition for 'RQ693865: Pen Sets 25 for Award Presentation' with 0 items and a total of \$0.00USD. A search bar contains the text 'Pen Sets', and the search results show 3 items found. The results are listed in a table with columns for item name, price, and actions. The items are: 'Pen Sets' at \$25.00USD/each, 'pen set' at \$5.00USD/each, and 'Pen Set' at \$25.00USD/each. All items are supplied by 'OFFICE DEPOT'. A yellow banner at the bottom of the results area says 'Can't find what you are looking for? Fill out a non-catalog form.'

Item Name	Price	Supplier	Supplier Part #	ETA (Days)	Actions
Pen Sets	\$25.00USD / each	OFFICE DEPOT	C121-1_NonCatalogItem	0	<a href="#">Add to Cart</a> <a href="#">Add to Favorites</a>
pen set	\$5.00USD / each	OFFICE DEPOT	1234	0	<a href="#">Add to Cart</a> <a href="#">Add to Favorites</a>
Pen Set	\$25.00USD / each	OFFICE DEPOT	1356	0	<a href="#">Add to Cart</a> <a href="#">Add to Favorites</a>

As a result of the Search” three types of Pen Sets were found. Notice that the Supplier Name, the Price and description are fixed. Requisitioners will now enter the quantity desired and get the best negotiated price.

# The Shopping Cart

Debug Info | Commits: 7 | AQL Queries: 9

Jeanne Sheridan | Preferences | Toggle Tips | Toggle Currency

RQ693865: Pen Sets 25 for Award Presentation  
Items: 1 | Total: \$25.00USD

Back to Catalog | Next | Checkout

### Shopping Cart

### Requisition

These are the items you have added to your requisition. You can edit, copy, or delete selected line items, and add new line items. If you change any values, update the total.  
To hide this screen in the future, click the check box; to show the screen again, reset the default preference. [How To](#)

No.	Type	Description	Qty	Unit	Price	Amount
1		Pen Set	1	each	\$25.00USD	\$25.00USD

Supplier: OFFICE DEPOT | Pen Set

LSDBE:

Mail Code: 000 (OFFICE DEPOT)

\*Commodity Code: PEN SETS, PEN AND MECHANICA...

Contract: C120

EPP (Environmentally Preferable Products): No

EPP Description:

isDCPS:

Edit | Copy | Delete | Add items

Total Cost: \$25.00USD | Update Total

Don't show this page again after adding item(s)(reset in preferences).

\* indicates required field

Back to Catalog | Next | Checkout

The Item is in the “Shopping Cart”. Change the Quantity to reflect the desired amount required and click on Update Total to see the amount of the purchase. Click “Next”.



# Add Accounting

The screenshot displays the PASS web application interface. At the top, the user is identified as Jeanne Sheridan. The main header shows 'RQ693865: Pen Sets 25 for Award Presentation' with 'Items: 1' and a 'Total: \$625.00USD'. The current step is '3 Add Accounting Details', with a 'Requisition' label on the right. A navigation bar includes '< Prev', 'Next >', and 'Exit' buttons. Below this, a text box explains that these are accounting details for each line item and can be edited or split. A 'How To' link is provided. The main section is titled 'Accounting - by Line Item' and shows 'Items in this request: 1'. A table lists the items with columns for No., Type, Description, Qty, Unit, Price, and Amount. The first item is '1 Pen Set' with a quantity of 25, unit 'each', price '\$25.00USD', and amount '\$625.00USD'. Below the table, several fields are listed with their values and status: 'Fixed Asset Indicator: Expenditure', 'Bill To: OFFICE OF FINANCES AND RESOURCE MANAGEMENT', 'Appropriation Year: 2010 (10/1/2009-9/30/2010)', '\*Comptroller Object: (no value) Value must be set.', '\*Agency Object: (no value) Value must be set.', 'Agency: POO (OFFICE OF CONTRACTING AND PROCUREMENT)', '\*Index No: (no value) Value must be set.', '\*Program Cost Account: (no value) Value must be set.', and '\*Fund: (no value) Value must be set.'. A note at the bottom left states '\* indicates required field'. Navigation buttons '< Prev', 'Next >', and 'Exit' are at the bottom right. The browser status bar at the very bottom shows 'Internet' and '100%' zoom.

No.	Type	Description	Qty	Unit	Price	Amount
1		Pen Set	25	each	\$25.00USD	\$625.00USD

You will need to add your accounting as per your typical process.

# Checkout

**4 Checkout** Requisition

Review your requisition, make changes as necessary, and submit the request for approval. [How To](#)

**Summary** Approval Flow

Title:

Preparer's Agency:

On Behalf Of:

Delay Purchase Until: ?

ePIF#:

Funds Status: No Funds Committed

Planned Procurement:

Retainage Flag:

Procurement Method:

Contract Type:

**Line Items (1)** [Hide Details](#)

No.	Type	Description	Qty	Unit	Price	Amount
<input type="checkbox"/> 1		Pen Set box of 25	<input type="text" value="5"/>	each	\$5.00USD	\$25.00USD

Supplier: [OFFICE DEPOT](#) Pen Set box of 25

LSDBE:

Mail Code: [000 \(OFFICE DEPOT\)](#)

\*Commodity Code: [PEN SETS AND REFILLS, CERAM...](#)

Contract: [C76-V2](#)

EPP (Environmentally Preferable Products): No

EPP Description:

isDCPS:

|

When you Check out, you will see some fields pre-populated like the contract number the procurement method, contract type, etc all as a result of using the negotiated contract.

# ***DASHBOARD***

# Dashboard Updates

- On the bottom left-hand corner you will see a link called “My Dashboard”.
- This change doesn’t impact you unless you currently uses Analysis, Contracts, and/or Sourcing.
- With the upgrade of Buyer in early FY2011, the “Swoosh” screen in Buyer will be replaced by the dashboard.
- There will be additional communication at that time.

# Dashboard Changes

The screenshot displays the Buyer dashboard interface. On the left is a navigation menu with the following categories and items:

- To Do**
  - [Approve Requests](#) 80
  - [Watch Requests](#) 22
- Reconcile**
  - [Invoices](#) 4
  - [Charges](#)
- Status**
  - [Composing](#) 30
  - [Submitted](#) 2
  - [Approved](#) 21
  - [Sourcing](#) 0
  - [Denied](#) 1
- Create**
  - [Requisition](#)
  - [Company eForm](#)
- Explore**
  - [Searches](#)
  - [Catalogs](#)
  - [Folders](#)
  - [Contracts](#)
  - [Administrator](#)
- Report**
  - [Reports](#)
- Receive**
  - [Purchase Orders](#)
- Spend Management**
  - [My Dashboard](#)

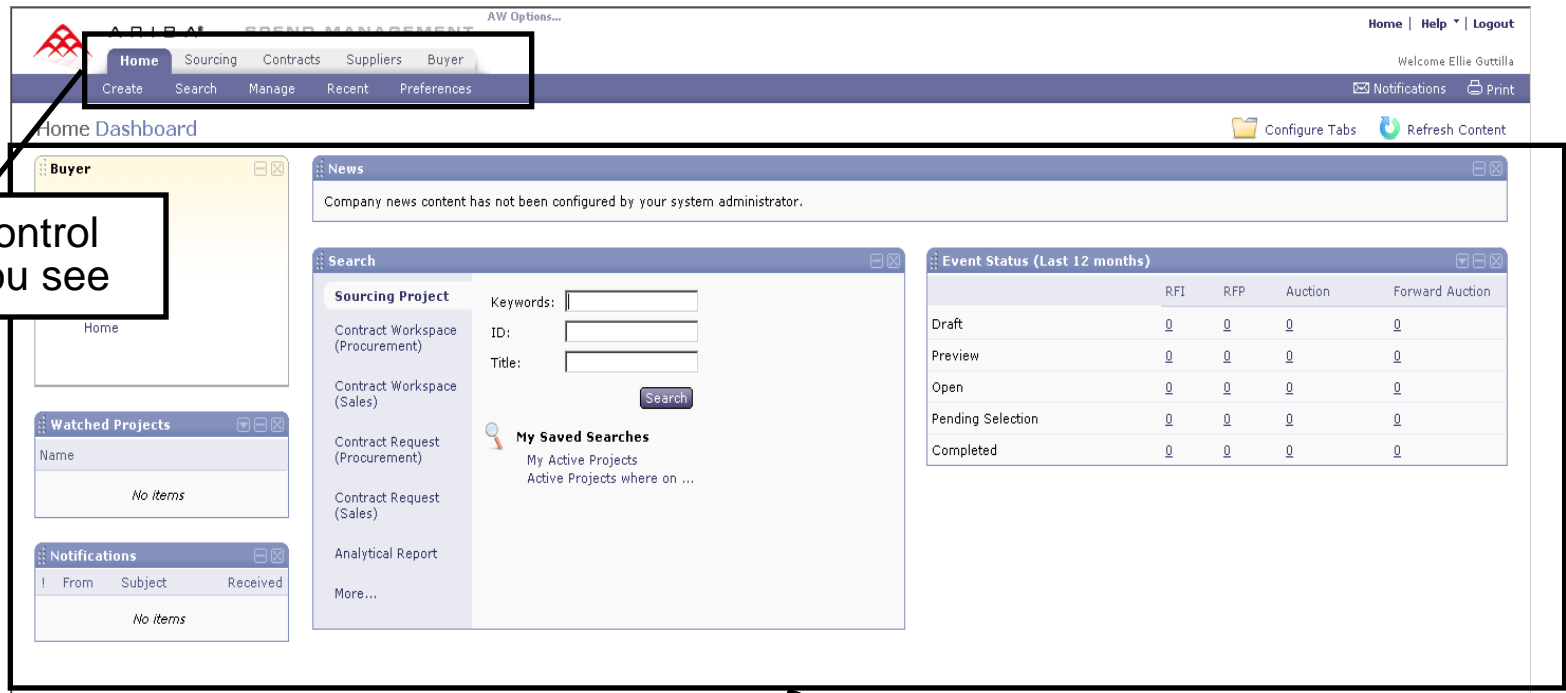
The central content area features a circular process diagram with nodes labeled 'Approve', 'Receive', 'Explore', 'Create', and 'Status'. A large 'Buyer' logo is overlaid on the diagram. Below the diagram is a 'DC Links' box containing the following links:

- [DC Website](#)
- [PASS Help Page](#)
- [ASMP Home Page](#)
- [Training FAQs](#)

An arrow points from the 'My Dashboard' link in the navigation menu to the text below.

My Dashboard on the Buyer page will link you to the Contracts page.

# Dashboards are your “landing pad” or operation center for Ariba products.



Tabs control what you see

Content is what you see

# ***SOURCING BENEFITS***



# Sourcing Benefits

## *Accelerating Bottom Line Results*

### Streamlining Procurement Processes

- ✓ Consistent sourcing processes and process compliance across the government
- ✓ Sourcing program visibility and control
- ✓ Accelerated sourcing project cycles
- ✓ Continuous measurements and improvements

### Increasing Competition

- ✓ Efficient negotiation of lowest-total-cost and best value supplier relationships
- ✓ Bottom-line results and rapid total cost savings
- ✓ Ability to extend strategic sourcing to all spend categories and agencies
- ✓ Broader-reach over vendors and improved communication with the vendors

### Ensuring Compliance

- ✓ Sustainable organizational knowledge by storing, maintaining, leveraging consistent documents, verbiage and tools
- ✓ Cross-Government Reporting on Sourcing Method, Rationale, Savings, Vendors, etc



***QUESTIONS?***

# Resources

- PASS Help: Contracts/Sourcing information, System Updates, Job Aides, Webinars, Roles and Explanations  
<http://passhelp.dc.gov>
- Wiki: OCP Contact Information, Procurement Procedures  
<http://wiki.in.dc.gov/index.php/Category:OCP>
- OCP training information: Procurement 101, SOW, Contract Administration  
<http://ocp.in.dc.gov/ocp/cwp/view.asp?a=3&q=501308&ocpNav=|30660|>
- PASS Help Desk number: 202-727-8700