Guide to EP010 Contract Summary

Contents

Background ................................................................................................................................................................................. 2

Security Role Mapping .................................................................................................................................................................. 2

How to Find Procurement/Contract Reports ................................................................................................................................. 3

Helpful Information.................................................................................................................................................................... 4

Using Processing Status with Associated Status .......................................................................................................................... 4

Variable Entry Page .................................................................................................................................................................. 5

Select Values (Search, Value Range) .................................................................................................................................. 5

Saving a Variant ..................................................................................................................................................................... 7

Analysis Area ....................................................................................................................................................................... 9

Drag and Drop ..................................................................................................................................................................... 9

Context Menu ................................................................................................................................................................... 10

Using Save As... to save customized report layout to Portal Favorites ............................................................................ 12

Glossary of Terms .................................................................................................................................................................. 13

Other Resources .................................................................................................................................................................. 15

BASE Training Center ...................................................................................................................................................... 15
Guide to EP010 Contract Summary

Background
EP010 Contract Summary primarily contains Contract Header data from SRM (Supplier Relationship Management). This report can be used to track the system agreements that have been approved by the District to issue purchase orders against. The report assists Procurement/Contract staff to track contract expiration dates, remaining balances, sponsoring department and the contract status as well as the contract types.

Security Role Mapping

<table>
<thead>
<tr>
<th>BW Report Name</th>
<th>BW Security Role Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>EP010 Contract Summary</td>
<td>BP001_0000 BW Procurement Reporter</td>
</tr>
<tr>
<td></td>
<td>BP002_0000 BW Shopping Carts Reporter</td>
</tr>
</tbody>
</table>

To request access, log onto SAP, click on Access Request tab, and click on Access Request Form. Go to User Access tab, click on Add, and select Role. Select Roles pop-up opens. From Business Process drop-down, select Procurement, click on Search button. Procurement roles will appear. Select appropriate role and click on OK button. Select Roles pop-up closes and selected role appears under User Access tab. Click on Submit button.
How to Find Procurement/Contract Reports

Log onto bts.lausd.net. Click on Reports tab. Click on Procurement/Contracts sub-tab.

1) Click on Reports tab

2) Click on Procurement/Contracts sub-tab

3) Click on EP010 Contract Summary
# Helpful Information

## Using Processing Status with Associated Status

<table>
<thead>
<tr>
<th>Processing Status</th>
<th>Associated Status</th>
<th>Where Does This Occur in Contract Release Process?</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Released</td>
<td>Not Assigned</td>
<td>Contract has been released</td>
<td>Contract is Released. This group also includes expired contracts.</td>
</tr>
<tr>
<td>Completed</td>
<td>Locked</td>
<td>After Contract has been released</td>
<td>Document is closed. No further actions can take place on the contract.</td>
</tr>
<tr>
<td>Held</td>
<td>Not Assigned</td>
<td>Prior to Contract being released</td>
<td>Started working on the Contract and is saved (Held) for more information or work.</td>
</tr>
<tr>
<td>Document Completed</td>
<td>Awaiting approval</td>
<td>Prior to Contract being Released</td>
<td>Contract is 'Awaiting Approval'.</td>
</tr>
<tr>
<td>Document Completed</td>
<td>Release Rejected</td>
<td>Prior to Contract being Released</td>
<td>Contract was not approved.</td>
</tr>
<tr>
<td>Deleted</td>
<td>Awaiting approval</td>
<td>Prior to Contract being released</td>
<td>Contract is deleted while in approval. Approver could have rejected and initiator deleted.</td>
</tr>
<tr>
<td>Deleted</td>
<td>Not Assigned</td>
<td>Prior to Contract being released</td>
<td>Started working on the Contract but later Deleted.</td>
</tr>
</tbody>
</table>

![Diagram](image_url)
Variable Entry Page
The Variable Entry page allows users to enter filter criteria prior to running the report. Selection criteria can usually be typed in or selected by clicking on the selection button. If manually typing in filter values, separate multiple entries with a semi-colon (;). It is strongly advised that users enter selection criteria before running any BW report. This is because SAP allows a maximum of 500,000 cells for report results.

Select Values (Search, Value Range)
Click on Selection button to open Select Values pop-up.

To search for a filter value, click on Show view: drop down menu, select Search. To search by either Key or Text, click on the drop down next to the field name. Type in your search criteria in the field located to the left of the Search button. Keep in mind, search is CASE SENSITIVE. Also, using a * (wildcard) before and after search may help.
To enter a **Value range**, click on the **Show tool: dropdown** and select **Value ranges**. **Value ranges** can be further customized to **Sign**: Include/Exclude and **Operator**: between, Equal, Greater, Greater or equal, lower, lower or equal, Contains Pattern.

Enter **From** and **To** values. Click on **Add** button to move range to **Selections** screen. Click on **OK** button.
Saving a Variant

A Variant is a filter variation that can be saved and reused whenever running a report. Variants allow users to save filter criteria on the Variable Entry screen for future use.

Creating report variants on the Variable Entry screen can be a time saver. Report Variants can be used to save frequently entered filter criteria. For example, EP010 Contract Summary requires users to enter at least one Contract Number. Creating a Variant for a specific Contract or range of Contracts may be helpful.

To create a Variant:

1) Enter Filter Criteria

Manually type in selection criteria
Or, click on selection button

2) Enter Value Range

Click on drop down for Show tool:
Select Value ranges
Enter From = 0
Enter To = 9999999999
Click on Add button to add range to Selections
Click on OK button
3) Save Variant

Click on Save As button

4) Save Variant pop-up opens

Enter Description
Click on OK button

Variant can be reused by clicking on dropdown next to Available Variants
Clicking on Delete button will delete Saved Variant

5) Available Variants
Analysis Area
The Analysis Area represents the report data. The Analysis Area is defaulted to a layout that is pre-defined by the business owner. The Analysis Area can be changed by dragging and dropping fields, filtering, sorting, etc.

Drag and Drop
Drag and Drop allows users to grab a field and drag it into or out of a report. It also gives users the ability to move or swap fields in a report.
Guide to EP010 Contract Summary

Context Menu
Provides users with additional report options. To get to the Context Menu, place cursor on a field and right click. The Context Menu has 5 primary features: Back, Filter, Change Drilldown, Properties, and Sort.

Back can be used to go Back One Navigation Step or Back to Start. Back One Navigation Step removes the last “action”. Back to Start returns the report to the original, default layout.

Filter allows the user to further filter data. Filter has 3 options: Select Filter Value, Remove Filter Value, and Variable Screen. Select Filter Value adds another filter. Remove Filter Value removes all filter values. Variable Screen re-opens the Variable Entry page for changing variable filter criteria.

Change Drilldown offers an alternative to Drag and Drop. Choose Drilldown by Horizontal (Columns) or Vertical (Rows) to add a field from Free Characteristics to the Analysis Area. Swap can be used to swap one field with another. Use Remove Drilldown to remove a field from the Analysis Area.
**Properties** is used to change the related field’s display. From the **General** tab, users can change the field **Display** to **Key, Text**, or **Key and Text** as well as change **Display Results** to **Never** or **Always**. **Attributes** (if available for the field) allows users to add additional information about the field. Keep in mind, however, that **Attributes** are always as of TODAY’S DATE (even in a historical report).

**Sort** allows users to sort fields. Keep in mind, BW reports automatically sort in the order of the fields displayed in the **Analysis Area**. Clicking on the up or down arrow next to a field will sort the field in ascending or descending order.
Using **Save As...** to save customized report layout to **Portal Favorites**

- Saving a report using the **Save As** button saves the customized report in **Portal Favorites**
- Reports saved to **Portal Favorites** can be stored and organized in custom folders for easy access
- Reports saved to **Portal Favorites** do not “break” like Bookmark links when the underlying report is changed

**Save As** allows you to save report layouts to **Portal Favorites**

Clicking on **Save As...** button opens **Save as** pop-up. Enter **Description** and click on **OK** button.
# Glossary of Terms

<table>
<thead>
<tr>
<th>Field Name (used in report)</th>
<th>Grouping</th>
<th>SRM / ECC</th>
<th>Header / Line</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td># of Option Prds.</td>
<td>Option Prds</td>
<td>SRM</td>
<td>Header</td>
<td>Number of options periods in a contract</td>
<td>1, 2, 3, 4, 5</td>
</tr>
<tr>
<td>% SBE</td>
<td></td>
<td>SRM</td>
<td>Header</td>
<td>Percentage of SBE participation contractor has agreed to use</td>
<td>10, 15, 20, 30, 50, 90, 100</td>
</tr>
<tr>
<td>Assoc. Status</td>
<td>Status</td>
<td>SRM</td>
<td>Header</td>
<td>Supplemental status to Processing Status is an additional status that provides further information on what is happening with the contract prior to Release or after it has been Released.</td>
<td>Awaiting Approval, In Renewal, Locked</td>
</tr>
<tr>
<td>Board Approval</td>
<td></td>
<td>SRM</td>
<td>Header</td>
<td>The Date when the Board approved the contract</td>
<td>mm/dd/yyyy</td>
</tr>
<tr>
<td>Changed On/Created On</td>
<td></td>
<td>SRM</td>
<td>Header</td>
<td>The Changed On date is the last action date on that particular contract</td>
<td>mm/dd/yyyy</td>
</tr>
<tr>
<td>Contract Category</td>
<td>Contract Grouping</td>
<td>SRM</td>
<td>Header</td>
<td>Is the grouping of agreement type</td>
<td>1 A&amp;B Letters, 3 Design-Build, 4 Facilities Provide &amp; Install, 5 Food &amp; Food Related Supplies, 6 Instructional Materials, 8 Lease-Leaseback, 9 Memorandum of Understanding Agreement, 10 Non-Stock Supplies, Equipment, Gen. Services, 11 Professional Services - A&amp;E, 12 Professional Services - Construction, 13 Professional Services - General, 14 Professional Services - Master Bench</td>
</tr>
<tr>
<td>Contract Name</td>
<td>Contract Grouping</td>
<td>SRM</td>
<td>Header</td>
<td>Name of Contract</td>
<td>YARNS &amp; ROVING (C-295 SOUTHWEST SCHOOL), VALUE CONTRACT_EXCEEDS LIMIT, TONER CARTRIDGES</td>
</tr>
<tr>
<td>Contract No.</td>
<td>Contract Grouping</td>
<td>SRM</td>
<td>Header</td>
<td>System generated number and the contract numbering ranges start from 4400000000 to 44999999999</td>
<td>4400000170, 4400000518, 4400001125</td>
</tr>
<tr>
<td>Contract Type</td>
<td>Contract Grouping</td>
<td>SRM</td>
<td>Header</td>
<td>Price structure grouping (describes pricing)</td>
<td>1 Firm Fixed Price, 2 Fixed Unit Rate, 3 Fixed Price with Eco, 5 Time and materials, 6 Cost Plus, 7 Other</td>
</tr>
<tr>
<td>Created On/Created On</td>
<td></td>
<td>SRM</td>
<td>Header</td>
<td>System date when the contract was started</td>
<td>mm/dd/yyyy</td>
</tr>
<tr>
<td>Dept. Contact</td>
<td>Sponsoring Dept</td>
<td>SRM</td>
<td>Header</td>
<td>Sponsoring Department Contact Name; should be the name of an individual in the Sponsoring Department (must be an SAP user)</td>
<td>JOE SMITH, MARY JANE, BILL JOHNSON</td>
</tr>
<tr>
<td>Distr. to Catalog</td>
<td></td>
<td>SRM</td>
<td>Header</td>
<td>Identifies if the contract was sent to the MDM Catalog module</td>
<td>Yes (X), No (#)</td>
</tr>
<tr>
<td>Exempt Comp. Approval</td>
<td>Exempt Comp</td>
<td>SRM</td>
<td>Header</td>
<td>Date exemption (from going through formal competition) was approved</td>
<td>mm/dd/yyyy</td>
</tr>
<tr>
<td>Exempt Comp. Type</td>
<td>Exempt Comp</td>
<td>SRM</td>
<td>Header</td>
<td>Identifies the exemption type from bidding (only populated if contract was exempt)</td>
<td>Federal Exemptions for Federally-Funded Projects, Mandated Service Provider, Other, Piggy-backed Contract, Single Source, Sole Source</td>
</tr>
<tr>
<td>Insurance Approval</td>
<td></td>
<td>SRM</td>
<td>Header</td>
<td>The date in which Risk Management approves the contractors’ insurance</td>
<td>mm/dd/yyyy</td>
</tr>
</tbody>
</table>
## Guide to EP010 Contract Summary

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Location 1 | Contract Location | SRM | Header | Can have up to 4 locations. | 102 LAUSD, 103 Stores Distribution, 104 Foods Distribution
Location 2 | Contract Location | SRM | Header | Can have up to 4 locations. | 102 LAUSD, 103 Stores Distribution, 104 Foods Distribution
Location 3 | Contract Location | SRM | Header | Can have up to 4 locations. | 102 LAUSD, 103 Stores Distribution, 104 Foods Distribution
Location 4 | Contract Location | SRM | Header | Can have up to 4 locations. | 102 LAUSD, 103 Stores Distribution, 104 Foods Distribution

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Location Ltd. NTP | Contract Location | SRM | Header | Date Notice to Proceed was issued | mm/dd/yyyy

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Modification No. | Option Prds | SRM | Header | Free text field, for keeping track of contract modifications | 1090101.05, AMEND #4, AMEND 1, ES-13082, OPTION 1,

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Option Prds. | Option Prds | SRM | Header | Type of Options (duration) | 30 Days, 6 Months, 1 Year (3) , 2 Years (4) , Others (5)

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Option Prds. Remaining | Option Prds | SRM | Header | Number of remaining option periods (unused) | 1, 2, 3, 4, 5, 6

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Purchasing Group (ECC) | Buyer | ECC | Represents the buyer in ECC | 001 Caputo Staging, 004 Construction/JOCS, 006 Hirsch Staging, 011 CENTRAL OFFICES, 104 FPPS, 186 ESC South

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Ref Contract Number | SRM | Header | Free text field, houses old IFS contract numbers and can also be used for Piggyback contract references | 0001446, 000446, 0151252, Piggyback

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Resp. Employee | Buyer | SRM | Header | Represents the buyer (person that created the contract). | 123 Smith, Joe; 555 Jones, Mary; 759 Reed, Manny

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
RFx Advertise | RFx | SRM | Header | When bid was advertised in the newspaper (first day) | mm/dd/yyyy

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
RFx Pre-Solicit. Mtng. | RFx | SRM | Header | Date of pre-bid conference mtg | mm/dd/yyyy

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Sponsoring Dept. | Sponsoring Dept | SRM | Header | Office requesting the contract (Contract Owner); should be a Fund Center/Cost Center | Accts Payable-CC - Gen Stores Whse, Carver MS, Health Education Pro, Manual Arts SH, Sch Polic Dept, Sp Ed Adm Svcs, Translations Unit

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Supplier | SRM | Header | Vendor/Contractor Name | 1000000007 PALLER-ROBERTS, 1000000019 KAMRAN & CO, INC., 1000003637 ACC ENVIRONMENT, 1000006102 AMBIENT

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Surety Approval | SRM | Header | Date bonds were approved | mm/dd/yyyy

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Validity From | Validity | SRM | Header | Contract Validity Dates - Start | mm/dd/yyyy

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Validity To | Validity | SRM | Header | Contract Validity Dates - End | mm/dd/yyyy

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Authorized Amount | SRM | Header | Total contract value (EXCEPTION: sometimes this value is split; in certain cases may not represent total contract value) | mm/dd/yyyy

### Field Name (used in report) | Grouping | SRM / ECC | Header / Line | Description | Examples
--- | --- | --- | --- | --- | ---
Release Amount | SRM | Header | How much of the contract authorized amount has been used to date |
Other Resources

BASE Training Center
All of the BW Report handouts can be found on the BASE Training Center website. [http://www.lausd.net/ol/basetraining/reports.html](http://www.lausd.net/ol/basetraining/reports.html)

Many of the concepts in this handout are covered in greater detail here.