

Contract Alert and Task Functionality

Introduction/Background

Prior to the new functionality listed in this document, Buyers would receive email and alert notifications for contracts that are approaching their expiration dates and for those that were expired.

The new functionality defined in this document describes how a buyer can manage alert emails and notifications for a contract.

New Functionality

In this section we will discuss the standard fields used to set an alert, how a buyer is notified of an alert, and how to manage alerts.

The field “Alert Expiration” on the Contract Header Tab (shown below) is used to indicate the number of days that the alert should be issued prior to the contract’s expiration date (Valid To date).

The screenshot displays the 'Header' tab of a contract management interface. The 'Basic Data' sub-tab is active, showing a 'Basic' section with the following fields:

- Smart Number: Material Master Prod Cat
- Smart Number is External
- Contract Number: 4400005250
- Contract Name: Material Master Prod Cat
- Contract Type: Central Contract
- Basic Contract:
- Confidential: Not Confidential
- Reason Code: (empty)
- Distribute Contract to Catalog: No

Below the 'Basic' section are the 'Organization' and 'Dates' sections:

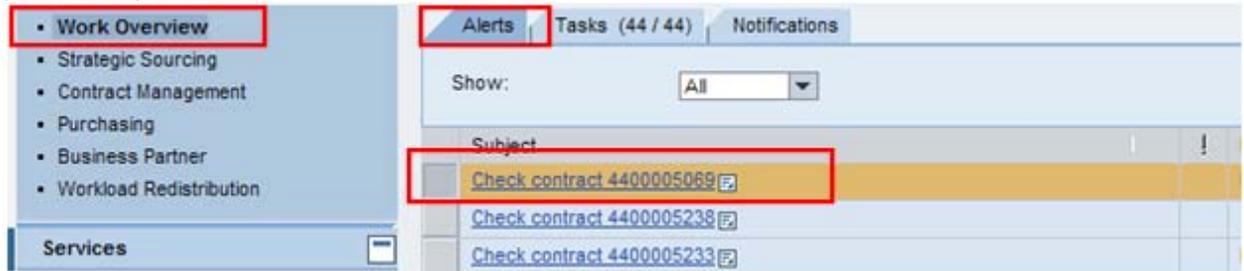
- Organization:
 - Purchasing Organization: * LaGov Purchasing Orgar
 - Purchasing Group: * OSPGEN1
- Dates:
 - FM Posting Date: * 09/26/2011
 - Valid from/to: * 09/26/2011 - 09/26/2011
 - Alert Expiration: 120 Day(s)** (highlighted with a red box)

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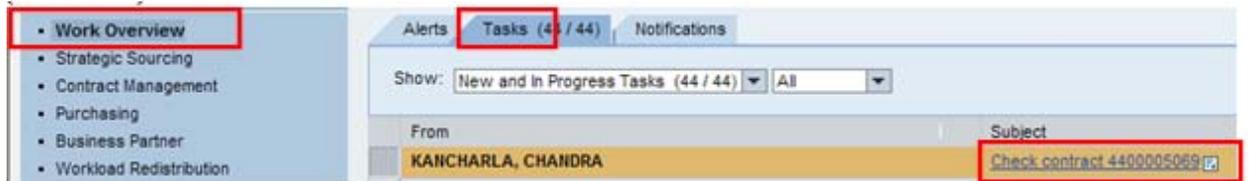
Once the current date is within the number of days indicated in the Alert Expiration field above, an alert will be issued for the contract.

The alert is issued to the buyer in the following 3 ways:

1. An email is sent to the buyer which arrives in their Outlook inbox
2. An alert notification is added to the buyer's "Alerts" Tab in their Work Overview link (see below)



3. A task notification is added to the buyer's "Tasks" Tab in their Work Overview link (see below)



Managing Alerts for Valid Contracts

The buyer may change the Alert Expiration field at any time by editing the contract to set the number of days to an appropriate number. As with any change to a contract, resetting this field will create a new version of the contract and will also change the version number. If an alert has been issued for a contract and the Alert Expiration field is reduced, the alert will continue to exist in the 3 places shown above until the buyer manages them as explained below. The buyer will not receive another alert notification for the contract until the Alert Expiration number of days is reached again.

Once an alert is issued, the alert will NOT be issued again UNLESS one of the following happens:

- Clicking the "Edit" button after displaying the contract, making changes, and releasing or saving the contract.
- Clicking the "Resubmit", "Forward" or "Assign To Me" buttons in the "Task" Tab of the Work Overview

In other words, if the contract is not changed and the buttons listed above are not clicked, the buyer will not receive another alert for the same contract.

Changes made to the alert on the "Alerts" Tab or changes made to the alert email do not affect the alert being issued again. The buyer can delete these as needed.

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If the Contract's Valid To date is extended, an alert will not be issued until the current date is within the Alert Expiration number of days prior to the new Valid To date.

Managing Alerts for Expired Contracts

When a contract's Valid To date is reached, the system will continue to send alerts to the buyer until the contract is "Closed". To close a contract, the buyer must edit the contract and click the "Close Contract" button which indicates that the contract is no longer valid. Alerts will not be issued for Closed contracts.