Purchasing Wave 2 Configuration Workshop

BUSN217c Review: Binds, Classes & Libraries

February 24, 2015
Agenda

- Configuration Workshop Objectives and Approach
- Demonstration of Final Product
- Review Submitted Values from DGS/CALTECH
- Configuration Items for the Workshop – navigation and screenshots
  - Binds
  - Classes
  - Libraries
- Review Department Submitted Values
- Completion/Questions
PO Configuration Workshop

- Configuration Workshop Objectives and Approach
  - Starting Point is DGS/CALTECH values
  - Demonstrate “end product” to gain better understanding of the configuration items
  - Review individual department submissions after seeing the demo and the DGS/CALTECH submissions
Demonstration

- Demo using DGS submitted values
Binds

- Binds
  - Practical Use
  - Navigation/Screenshot
  - Discussion on Configuration Values/Template

- Definition
  - Binds are variable definitions that enable a user to map source transactional values, such as a purchase order transactional contract or contract wizard values, to content within contract clauses, sections, and Microsoft Word templates.
  - When the system processes binds during document generation, the value of the record field that is mapped to the transactional bind variable or the response value of a wizard bind variable replaces the bind variable placeholder in the document.
Binds

Bind Definition

Bind Variable: CITY

*Description: City

Bind Type: Wizard

Field Type: String

Field Length: 030

Save Return to Search Previous in List Next in List Notify Add Update/Display
Classes

Definition

- Clause Classes provide a user-defined method of categorizing clauses, particularly for the purposes of clause approvals.
- Each class contains a description and an optional list of approval types, including a default that enables a user to define how the clauses of that class are to be approved.
- For example, when a user creates a new clause, the class must be specified. Based on the class selected, the system can supply the appropriate workflow by the approval type defaulted on the class.
Classes

Clause Class

SetID: SHARE  Class Name: CLASS01
*Description: Standard Procurement Clauses

*Default

Approval Settings

*Approval Type | Description                  | Default
---|---|---
HIGHRISK      | High Risk Clauses            |     |
LOWRISK       | Low Risk Clauses             |     |
MEDI RISK     | Medium Risk Clauses          |     |
Libraries

- Libraries
  - Practical Use
  - Navigation/Screenshot
  - Discussion on Configuration Values/Template

- Definition
  - Clause libraries define a broad grouping of contract clauses.
  - To establish a library, enter a library name and description. After the library is established, contract clauses can be assigned to it using the Library field on the Clause Definition page.
Libraries

Library Definition

SetID: SHARE
Library: AMENDMENT
Description: AMENDMENT RELATED LIBRARY
Department Submissions

- Review Department Submissions
  - State Controller’s Office (SCO), Department of Toxic Substances Control (DTSC), California Children & Families Commission (CCFC), Victim Compensation and Government Claims Board (VCGCB), Alcoholic Beverage Control (ABC), High Speed Rail (HSR)
  - Department of General Services (DGS), California Department of Technology (CALTECH)
Question and Answer

FI$Cal Project Information:
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