Section 1
Introduction

State Contract and Procurement Registration System
(SCPRS)

Procurement Division, DGS
July 1 2003

SCPRS Purpose
The purpose of the State Contract Procurement Registration System (SCPRS) is to identify, develop and distribute a system to facilitate the registration of contract information of state agencies for the Department of General Services (DGS). The primary business objectives for the SCPRS include:

Please review the Overview link on the Introduction page before you log into the SCPRS for background information on the SCPRS. Additionally, refer to Management Memo 03-09, State Contract and Procurement Registration System (SCPRS) May 12, 2003.

MM 03-09 states in part:
"Effective July 1, 2003, all state agencies will be required to enter summary information via the internet regarding all purchases or contracts over $5000. This information will be electronically filed, thus creating an accurate database of all significant state purchases on a near real time basis. As used herein, the term agency shall include all agencies, departments, boards, commissions or other state bodies whose contracts are generally subject to DGS review and approval pursuant to Public Contract Code 10295."

Exemptions
MM 03-09 also addresses exemptions to this requirement: "Requests to exempt specific contracts based on legally required confidentiality or where necessary to protect the State's interest must be submitted to SCPRSAdministrators(dgs.ca.gov)."

Software Requirements
All you need to access SCPRS is an Internet Browser. The following browsers work well with this system but other browsers may be used.

Microsoft Internet Explorer v5.5 or above Netscape Navigator 4.7.2

Printing Information
Many of the screens include a link to a printable version of the data that appears on the screen. This option is available for you to print the contract data without the frames, coloring and borders that are standard to State of California web sites. When you click on Printable Version in blue text in the top right of the screen, a new window opens. At

this time, click on the gray ***Print*** button that is part of the new window's menu across the top of the new window. (Contact your department's computer support or help desk staff if you need further assistance on your office's printing methods.)

If the new window opens part way on your screen and appears to sit on the SCPRS window already opened, you would click on the small 'X' in the far right upper corner of the new window to close it. (See **Reports** in Section 5 of the Users Guide for additional information.)

If the window opens all the way and covers the screen, you will need to click on the gray ***Back*** button on the top left corner of your Browser window. [**Careful**: If you click on the 'X' in this circumstance you will be closing the SCPRS.]

Introduction Page

The SCPRS Introduction page will appear when a user types in the following address in their browser, https://www.scprs.dgs.ca.gov. Remember to include the 's' in the 'https' when you type in the url address to indicate that this is a secure site.

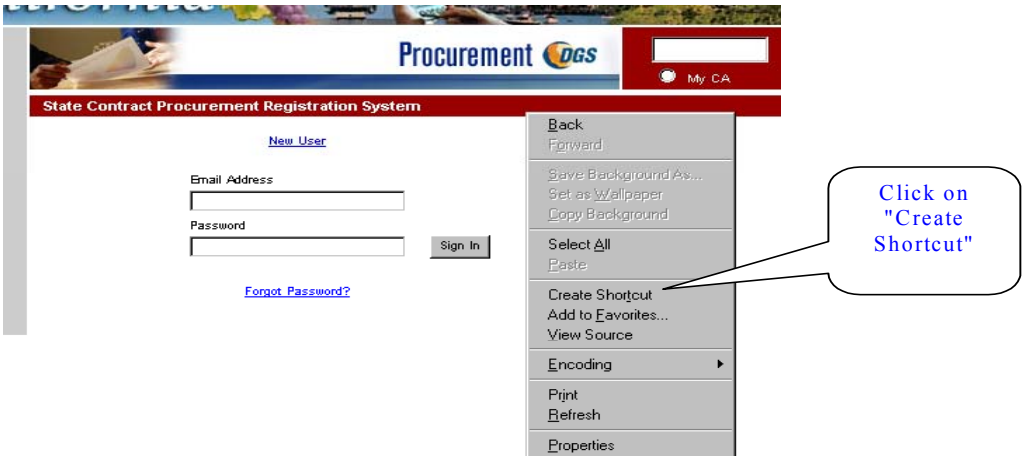
Note: The Introduction Page has a link called Contact Us that will open an email message box. Any comments, suggestions or requests (other than data correction), can be sent to the SCPRS Administrator. For data correction, please go to the Request Corrections/Feedback link that is on the left side of the screen after you are logged into the system.

Log In Page

The log in link on the introduction page takes the user to the screen shown below. This log in screen is the entry point for all users into the SCPRS system.

There is a box for the user to enter their email address and a box below that to enter their password. Please note that first-time users **must** click on the New User link above the email address box. **SCPRS will assign your first password**. **Do not enter the password that you usually use at your office for your own department's automated systems - it will not work.** You must request a new password from DGS through this link and it will be generated by the SCPRS system. Once you enter the system for the first time with this new password, you can easily change it to another.

For convenience, the user may want to add a shortcut on their desktop to provide a quick link to the SCPRS. At the log in screen, click with the **right button** on top of your mouse. A small menu list appears on your desktop. Select the **create shortcut**. A shortcut icon appears on your desktop screen and allows you to quickly return to the SCPRS system (see screen below for this menu that appears when you right-click your mouse). You can also add the SCPRS log in page to your Favorites list on your browser. (For specific training for your particular Browser software, please contact your department/agency's computer support or help desk staff.)

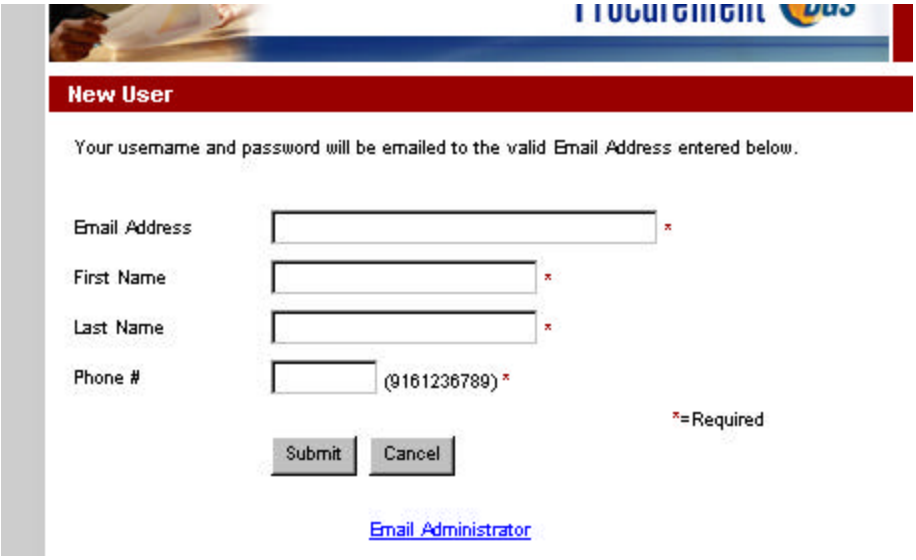


Go to Section 1a to continue the **Introduction** part of the User Manual

Section 1a
Introduction (continued)
SCPRS
July 1 2003

New User

Click on the New User link on the log in page if this is your first time using the SCPRS. The screen below provides a box for the user to type in a **valid** State of California email address. This email is the same one normally used during your daily work and the one assigned to you by your department. All email from the SCPRS uses this email address to communicate with the user. If a user has more than one email, please use the one where you wish to receive SCPRS emails.



After you have correctly entered your email address and other information, click on the gray ***Submit*** button. Within seconds, you will receive an email response with your new first time password from SCPRS in your usual email system, such as Outlook or Lotus Notes. The email address you enter for your log in used by SCPRS to communicate with you.

The first email includes the new password that allows you to log in to the SCPRS for the first time. The password is represented in the example shown below by a box with multiple 'X's. You may want to write down your password and save this email for future reference. The email also contains a link that leads you directly to the log in screen of SCPRS (shown earlier in this document).

Note: Passwords are not case sensitive in the SCPRS.

-----Original Message-----
From: SCPRS Admininistrator [mailto:scprsadministrators@dgs.ca.gov]
Sent: Tuesday, February 25, 2003 11:50 AM
To: dion.campos@dgs.ca.gov
Subject: SCPRS User Registration Confirmation

Dear Customer,

Thank you for registering with the State Contract and Procurement Registration System (SCPRS).

User id: dion.campos@dgs.ca.gov.
Password: xxxxxxxx

Please save your user information in a secure location for future reference.

Please click on the hyperlink below to logon to the State Contract and Procurement Registration System.

www.scprs.dgs.ca.gov/login.asp

Thank You
SCPRS Administrators
SCPRSAdministrators@dgs.ca.gov

SCPRS Users Roles

The SCPRS accommodates a number of different needs by assigning different types of permissions based on the user type. All users are assigned the Agency User role when they initially enter the system for the first time as described in this User Manual. ***If you feel you need a role of Delegated or General Viewer User, you must request the change by contacting the Admin User through the Feedback link (see Section 2).*** The fourth role, Admin User is restricted to DGS Procurement Division Help Desk staff.

The roles and responsibilities for each of the four user types are listed below:

Department/Agency User

- Enter and view Agency level contracts/Admendments
- Generate reports for their agency/department and their sub agencies/departments based on the Uniform Code Manual (UCM) level. (Refer to Section 3a for more information on the Department of Finance assigned codes.

Delegated User - restricted to DGS Buyers

- Enter and view contract and/or amendments for any department/agency.
- Enters initial contract registration that was created in response to a purchase request by a different agency/department. Also, receives first email confirmation for new contracts.
- Change owner of contract to the requesting department/agency. Requesting department/agency will enter data for subsequent amendments to the STD.213 and have the ability to view contract/amendment data. If DGS Buyer originally issued the purchase order, only PD will enter data for subsequent purchase order

changes, although the requesting department/agency will have the ability to view the data.

General Viewer - request will be reviewed by SCPRS Committee.

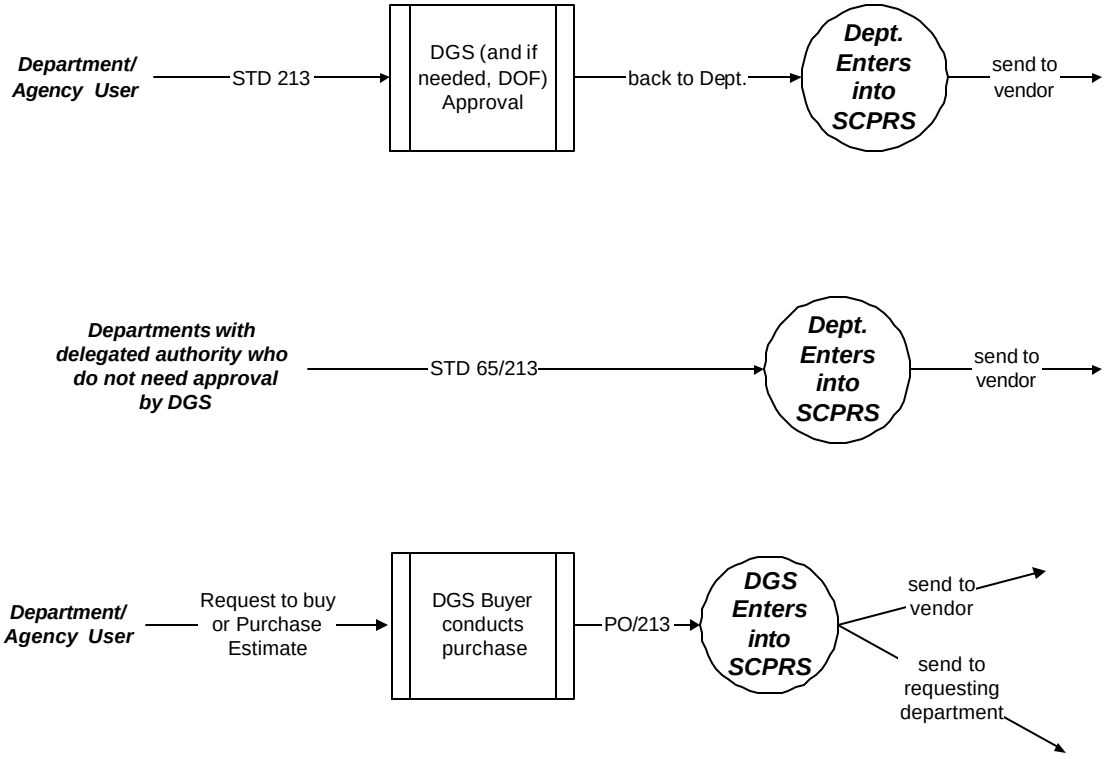
- View contract/amendments/purchase order changes for all departments and agencies statewide.
- Do NOT have permission to enter or change contracts/amendments

Admin User - DGS Help Desk only

- Modify contracts/amendments per user request
- Modify user profile and user roles.
- View all agencies' contracts/amendments
- Do NOT have permission to enter contracts/amendments

SCPRS Registration Process Flowchart

The general rule is that the contract/amendment is entered into the SCPRS system directly before the final documents are sent to the Vendor.



May 28, 2003
SCPRS Users Manual

Forget Password
Another link on the log in screen provides assistance if you forget your password. Click on the link to go to a screen that is similar to the 'Initial Password' screen seen below.

The user must enter the **same email address** used when they initially entered the system. Click on the gray ***Submit*** button and an email will be delivered to you with the last password you used.

Note: If you do not remember your password, you must use this screen to receive assistance. Your password is inaccessible to SCPRS staff and this method provides a response from SCPRS in just seconds.

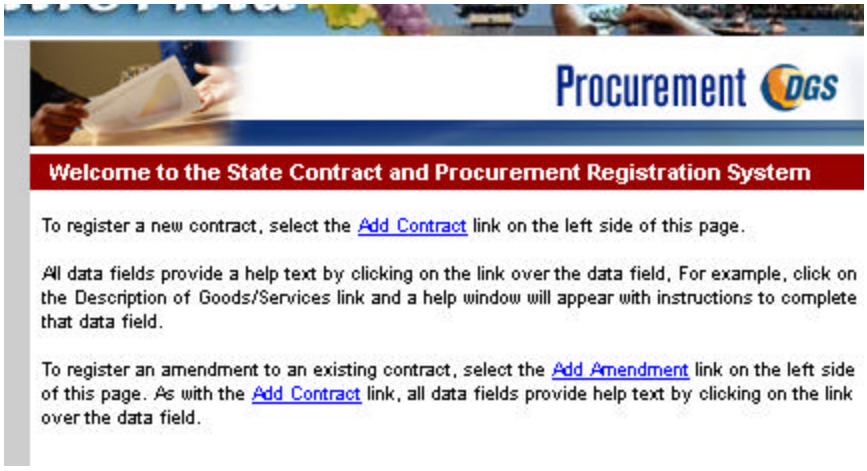
Log In boxes
The first time you log in to SCPRS, enter your normal work email address and the password that the SCPRS system sent you in your first email into the two boxes on the log in screen. Once in the system you can change your password.

Change Password
Click on the link for Change Password that is located in the left hand of the screen in the gray area. The following screen appears.

Type in your current password in the first box and your new password in the next two boxes. The new password must be at least 8 characters long. You may use all capital letters, all small letters, or a combination of both. You may also use a combination of numbers and letters. Do not use special characters such as # signs or % signs. Click on the gray ***Submit*** button. A *thank you* screen appears and states that your password has been changed and your new password has been emailed to you. The email is confirmation that your password was changed.

Sign In and Welcome to SCPRS Page

After a user successfully logs in to the SCPRS by entering a valid email address and valid password, they will come to the first screen in the SCPRS as shown below. Information on this **Welcoming** page is contained in Section 2 of the Users Guide.



Note: ***The system will automatically log you off after 20 minutes*** if you have not actively been working in the system, i.e., if the system sits idle. When

you do attempt to change a screen or add data, the system will inform you that you have been logged off and must log in again (see screen below). Simply click on the SCPRS Log In link and re-enter your ID and your password.

Also, if you were in the process of adding contract or amendment information and had **not** clicked on the gray ***Submit*** button before you were timed out of the system, the data was **not saved** and will need to be re-entered.

Log Off

When you click on the log off link located in the left gray area of the screen, you see the screen below.

Section 2
Welcome
SCPRS

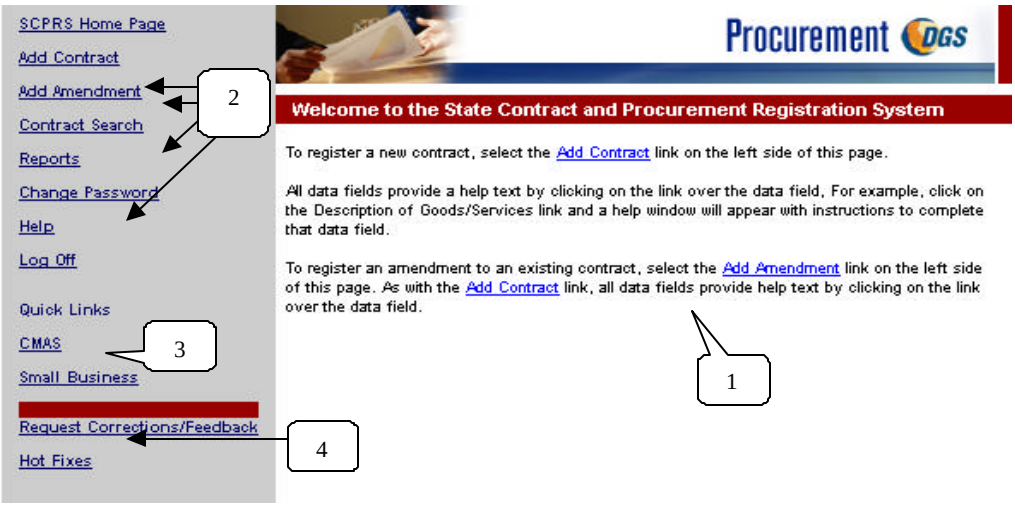
Procurement Division, DGS
July 1 2003

This Users Manual is written for the Agency (or Department) User. This user can enter and view agency level contract/amendment data. They can also generate reports for their agency/department and their sub agencies/departments based on the Department of Finance's Uniform Code Manual (refer to section 3a for information on these codes).

If you have a need for permissions other than those presented above, such as, to view the data only or to delegate the procurement to a department other than your own, please contact the SCPRS Administrator concerning different User types.

Links on the Welcome Page

The first page you will see after successfully logging into the system is the Welcome screen SCPRS Home Page shown below. The gray area on the left of this screen has links to take you to a number of different places and are available throughout your navigation in the SCPRS.



Referring to the numbers in the comment boxes in the screen above, you can do the following from this first page:

1. The middle of the page provides links to allow the user to Add Contract or Add Amendment(s) to a contract that has previously been entered into SCPRS. If the contract was never added, you will not be able to add an amendment. **You must first add a contract before you can add an amendment to that contract**. See Sections 3 and 4 for detailed information.

2. The left side of the page also contains links to add or amend a contract. Additional links take you to the SCPRS Home Page (this is the screen shown above), Contract Search, Reports, the Change Password screen, the Help manual and also permit you to Log Off.
3. *Quick Links* on the left side of the screen will take the user to Procurement Division's Internet pages for CMAS and Small Business.
4. Additionally, there are links in the gray area to permit Request Corrections/Feedback from users to the SCPRS staff and to view announcements (Hot Fixes) from SCPRS to the users.

For additional information on the following links, go to the User Guide section indicated.

Change Password - Section 1	Add Contract - Section 3
Add Amendment - Section 4	Reports - Section 5

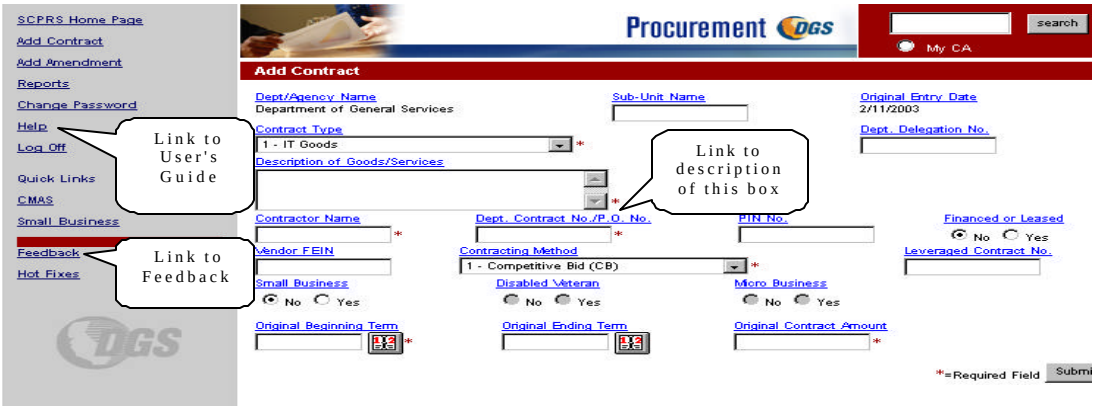
Help Assistance

There are a number of help sources in the SCPRS system to assist the user. If you have suggestions on improving the system, please let us know. We welcome and encourage your input.

The user has the following help support options available.

- A Request Corrections/Feedback link in the gray area on the left of each screen throughout the system is available for the user to send questions and concerns to the SCPRS staff. **Note**: Go to this section to request changes to any data previously entered for a contract or amendment along with reasons for data change. This process provides an audit trail for any changes made to the data once entered by the user.
- *A User's Manual*. This manual can be viewed on screen, printed or saved to your own computer. A click on the Help link in the gray area on any screen will open a new page with the User's Manual table of contents. A click on any of the sections highlighted in blue text will open that section only. To print that section of the manual that appears on your screen, use your normal settings and method of printing from your Browser software.

  Near the bottom of the screen are two links that allow you to download the entire manual in a PDF format or a ZIP format (a smaller file than PDF). The entire manual can then be printed at one time from the PDF file or after the zip file has been downloaded and unzipped in PDF format. (If you need further assistance, please contact your department/agency's computer support or Help Desk staff.)
- Each screen has its own help information for each piece of data on that screen. There is a blue link directly above *each individual box* (see below). This link will open a window that contains a description of the data for that box. The screen below shows these links.



Below is an example of a description window for the ***Department Contract Number or PO Number.***

Note: To open a second help box in SCPRS, you must first close this description window. If you do not close this window, you can still continue, but the description windows remain open and may affect the performance of the system. Either click on the small 'X' in the far right top of the help window or click on the Close link in the top middle of the description screen next to the Print link.

Go to Section 2a to continue the **Welcoming** part of the User Manual

Section 2a
Welcome (continued)
SCPRS
July 1 2003

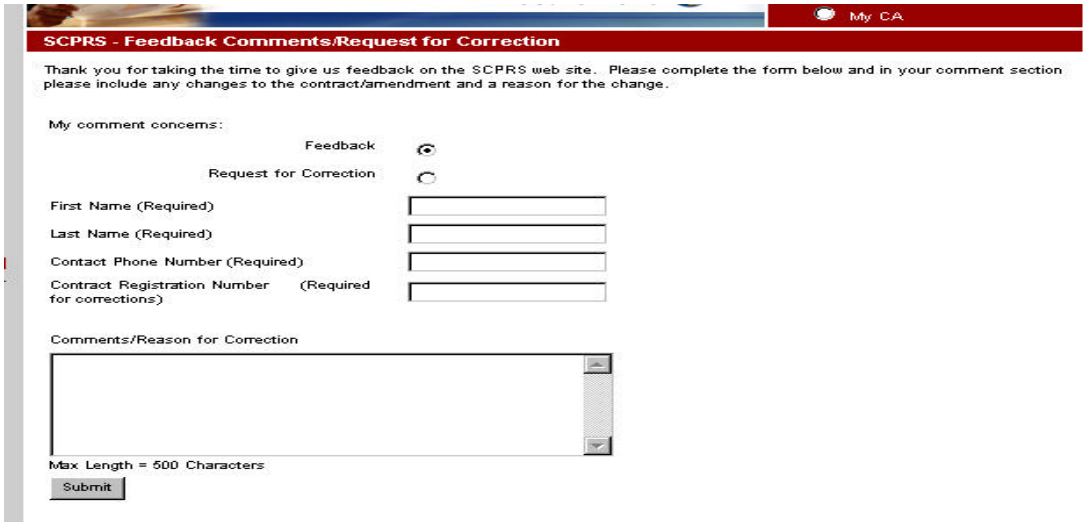
CMAS and Small Business links

If you click on the link for CMAS or Small Business in the gray area on the left side of the screen you will be taken to Procurement Division's (PD) separately maintained web site for these programs. You will not actually leave the SCPRS system, but the new web site will appear to sit on top of the SCPRS screen in a smaller window. This is to ensure that you do not have to log back into the SCPRS when you are done with these PD sites. Once at the CMAS or Small Business web sites, you can browse and search for any information that is normally available at those sites.

To return to SCPRS simply close the PD window sitting on top of the SCPRS window by clicking on the small 'X' in the farthest top right corner of the PD window. See the screen below. (Contact your department's computer support or Help Desk if you need further assistance with closing Browser windows.)

Request Correction/Feedback

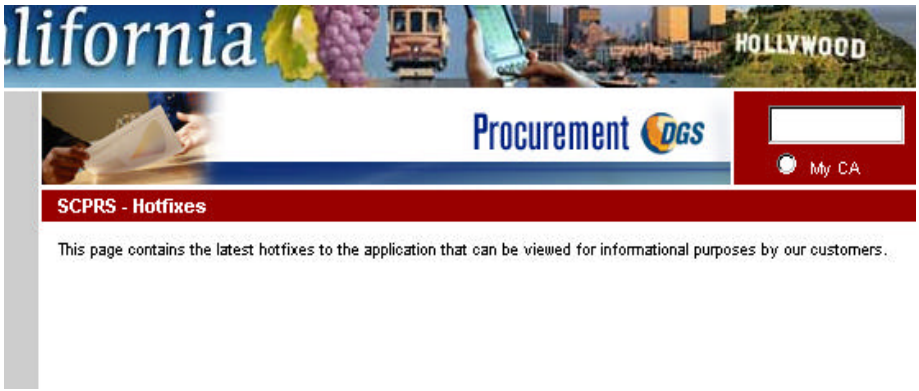
The Request Correction/Feedback link on the left of the screen permits the user to submit problems and questions to the SCPRS staff in addition to data corrections of previously entered data. Once contract and amendment data is submitted to SCPRS the user cannot change the data themselves but must enter a data change request to SCPRS through this screen.



1. Select one of first two items to indicate that your message contains either feedback or is a request for corrections to be made.
2. Type in your name, email address and phone number.
3. If data correction is being requested, enter the SCPRS Contract Registration Number.
4. Use the Comments box to type in your message. Data changes must include the reason for the change. Comments are limited to 500 characters, so be as concise as possible.
5. Remember to click on the gray ***Submit*** button after you are done.
6. A thank you screen will appear when your message has been successfully sent. Click on the small 'X' in the top right corner to close this thank you window.

SCPRS - Hotfixes

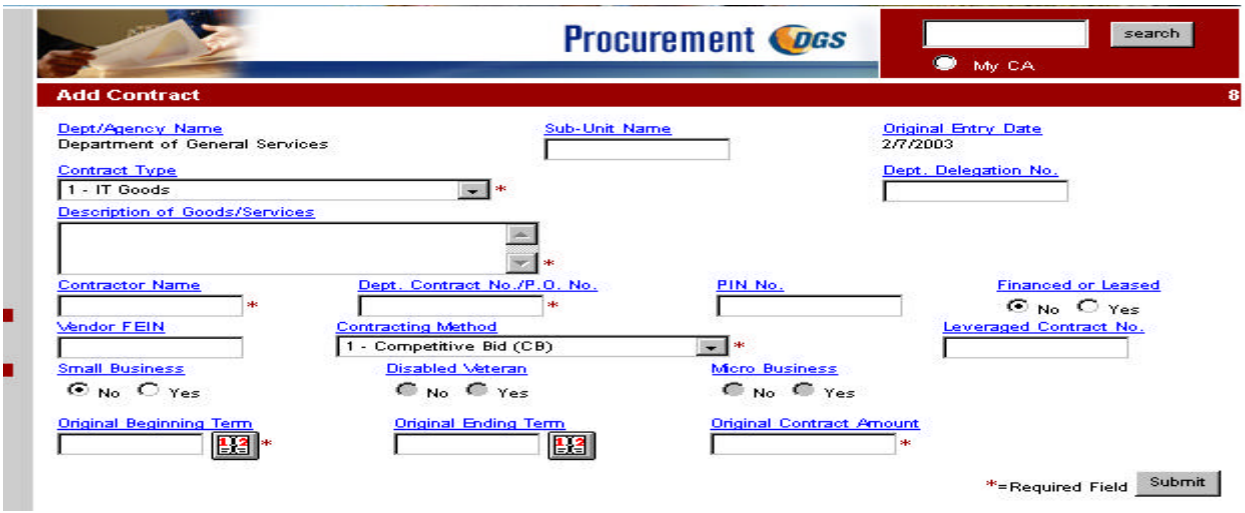
This link will take you to a screen that displays announcements that are of interest to the user. Check this link often to stay informed on fixes, new features or important messages. To close this announcement window click on the gray ***Back*** button on the top left corner of the browser window.



Section 3
Add Contract
SCPRS

Procurement Division, DGS
August 12, 2003

The following screen is used to add a contract. This is the first screen used to enter a new contract into SCPRS. Note that amendments **cannot** be added to the SCPRS until a contract has been first added to the system.



The following pages in the User's Guide address each of the boxes on this first **Add Contract** page. The boxes are listed as they appear on the screen, starting at the top of the screen and going from left to right.

Boxes that have a red asterisk to their right are required and must contain data. If a required field is empty, a message box appears and the system does not allow you to continue when you click on the gray ***Submit*** button on the bottom of the screen.

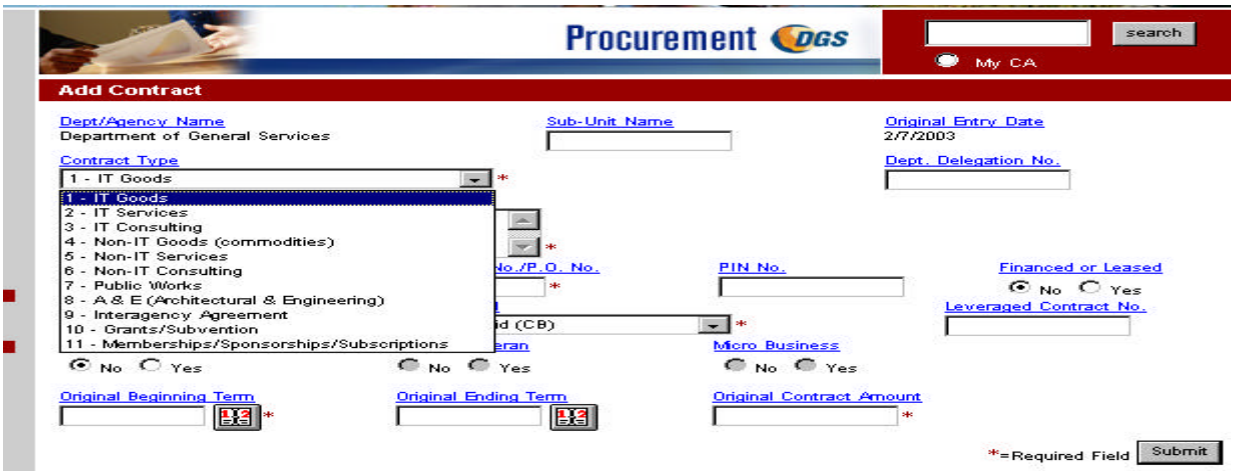
Dept/Agency Name - Defaults
The name of the user's department/agency is defaulted to the Department/Agency associated with the user's email address. The user does not have to do anything for this information to be added to the new contract.

Sub-Unit Name
Enter the full name of the Department/Agency sub-unit. This box allows a large amount of text to be added. **Do Not Abbreviate**. For example: Procurement Division is a sub-unit of the Department of General Services and should not be abbreviated to PD.

Original Entry Date - Defaults
Today's date is automatically entered for a new contract based on the SCPRS computer's system date. The data format is month, day, year order (MM/DD/YYYY). For example: March 22, 2003 is 03/22/2003.

Contract Type* - Required Field; pull-down box
This box permits the user to select from a list of choices for contract type. One of the choices **must** be selected. Unless a different type is selected from the drop down box, the default value of 1-IT Goods is automatically used for the Contract Type.

To select a different contract type than the default '1-IT Goods' click on the small arrow in the gray box at the far right inside of the box to view a pull-down listing. The screen looks like the one below. Move the mouse to the item to be selected and click on that item. The item should now appear in the Contract Type box.



A table of required fields for each Contract Type is included here and appears in the description window when the blue text Contract Type above the box is clicked.

	Contract Types	**Beginning Term**	**Ending Term**	**Delegation #***
1	IT Goods	Required		Required*
2	IT Services	Required	Required	Required*
3	IT Consulting Services	Required	Required	Required*
4	Non-IT Goods (Commodities)	Required		Required*
5	Non-IT Consulting Services	Required	Required	
6	Non-IT Services	Required	Required	
7	Public Works	Required		
8	A & E (Architecture & Engineering)	Required**		
9	Interagency Agreement/Other Public Entities	Required	Required	
10	Grants/Subvention Contract	Required	Required	
11	Memberships/Sponsorships	Required	Required	

*Contract Types that require a Department Delegation Number include IT Goods, IT Services, IT Consulting Services, Non-IT-Goods (Commodities) and Interagency Agreements for select data centers. . A Department Delegation number is not required if the Contracting Method is a CMAS or MA as described in the Contracting Method drop down data field. Once a "formal" delegation for all "leveraged procurement agreements" (these include CMAS and MA's) is granted, that number **must** be included in the "Delegation #" field. **Refer to the A&E definition below for information on ***Required Beginning Term***.

Below is a detailed description of each item that is available for ***Contract Type***. If further assistance is needed, please send a message to the SCPRS staff through the ***Feedback*** link that is located in the gray area on the left of the screen.

Contract Type*

1 - IT Goods

Additional Required Fields: ***Beginning Term; Delegation No.***

Is it a contract for the purchase of a Commodity or Goods? Does the contract have as its sole or main purpose the buying of some tangible items, such as equipment, parts, supplies, or other merchandise? If so, are the items responsible for the predominant value to the contract? Additionally, these goods are specifically of an IT nature.

Example: A mainframe computer would be an IT Good. Although an automobile may contain subsystems that include computerized functions is a Non-IT Good.

2 - IT Services

Additional Required Fields: ***Beginning Term; Ending Term; Delegation No.***

As defined in GC § 11702(e) "Information Technology" includes, but is not limited to, all electronic technology systems and services, automated information handling, system design and analysis, conversion of data, computer programming, information storage and retrieval, telecommunications which include voice, video, and data communications, requisite system controls, simulation, electronic commerce, and all related interactions between people and machines.

3 - IT Consulting

Additional Required Fields: ***Beginning Term; Ending Term; Delegation No.***

Is it a Consulting Services Contract? Does the contract have as its sole or primary purpose some type of recommendation, or product of the mind? Are the unique knowledge of the individual and intellectual abilities of critical importance to the success of the contract?

IT consulting is a subset of IT Services and identifies a specific type of IT Service.

4 - Non-IT Goods (commodities)

Additional Required Fields: ***Beginning Term; Delegation No.***

As described in PCC § 10290 “Goods” means all types of tangible personal property, including material, supplies, and equipment.

As Described in the State Contracting Manual § 1.05:

Is it a contract for the purchase of a Commodity or Goods? Does the contract have as its sole or main purpose the buying of some tangible items, such as equipment, parts, supplies, or other merchandise?

5 - Non-IT Services

Additional Required Fields: ***Beginning Term; Ending Term***

As defined in the State Contracting Manual § 1.05:

Is it a Contract for non-I/T services? Does the contract have as its sole or primary purpose providing non-I/T services? Services contracts are those that have someone doing something. Many Service Contracts are easily identified, e.g. waste removal services, cleaning services, etc. However, some Services contracts are more difficult to determine, especially when they involve other disciplines as well. Example: A contract for carpeting may involve purchase of carpet (commodity) as well as removal of old carpet and pad (Service), and installation of new carpet and pad (Service). The determining factor should be what is the primary focus of the contract and expertise of the contractor. Purchase of the item, or proper installation?

6 - Non-IT Consulting

Additional Required Fields: ***Beginning Term; Ending Term***

As defined in Public Contracting Code: PCC § 10335.5. (a) "Consulting services contract," as used in this article, means services that do all of the following:

(1) Are of an advisory nature.
(2) Provide a recommended course of action or personal expertise.
(3) Have an end product that is basically a transmittal of information either written or verbal and that is related to the governmental functions of state agency administration and management and program management or innovation.
(4) Are obtained by awarding a contract, a grant, or any other payment of funds for services of the above type.

The product may include anything from answers to specific questions to design of a system or plan, and include workshops, seminars, retreats, and conferences for which paid expertise is retained by contract.

Non-IT Consulting is a subset of Non-IT Services and identifies a specific type of Non-IT Service.

7 - Public Works

Additional Required Field: ***Beginning Term***

An Agreement for the erection, construction, alteration, repair, or improvement of any public structure, building, road, or other public improvement of any kind in accordance with PCC § 1101and SCM, Chapter 10, et al. Public Works contracts may have both amendments for administrative changes to the contract and change orders for work and product specification changes. Both amendments and change orders should be entered into the system as an Amendment.

> **Note**: Please refer to **Add Amendment** in Section 4 of the User Guide for instructions to enter Public Works Contracts Change Order information into the SCPRS system and for *important information* on the numbering of amendments of Public Work contracts.

8 - A & E (Architectural & Engineering)

Additional Required Fields: ***Beginning Term***

> **Note***:* Enter the original beginning term of this contract. For contracts with no beginning date, enter the date of execution. The date of execution is the date of Office of Legal Services approval (if required), or the date of signature by the authorizing State Agency (if Office of Legal Services approval is not required due to delegation).

A&E (Architect And Engineering) Contracts: Contracts for the professional services of an architectural, landscape architectural, engineering, environmental, or land surveying nature as well as incidental services that members of these professions and those in their employ may logically and justifiably perform. Also includes construction management services provided by a licensed architect, registered engineer or licensed general contractor which meet the requirements of Government Code 4529.5 for management and supervision of work performed on state construction projects. Section 4529.5 requirements include construction project design review and evaluation, construction mobilization and supervision, bid evaluation, project scheduling, cost-benefit analysis, claims review and negotiation and general management and administration of a construction project.

9 - Interagency Agreements and Other Public Entities

Additional Required Fields: ***Beginning Term; Ending Term; Delegation No. for select data centers***

This includes interagency agreements (as described in the State Contracting Manual § 3.03) and agreements with other public entities, such as federal, county

and city governmental units, non-California state agencies, joint powers authorities, and campus foundations.

10 - Grants/Subvention

Additional Required Fields: ***Beginning Term; Ending Term***

Grant: To bestow or confer a benefit on another, with or without consideration. Grants provided by state agencies must be authorized by the Legislature.

Subvention/local assistance: A contract financed out of the local assistance portion of the budget; includes agreements providing assistance to local governments and aid to the public directly or through an intermediary, such as a nonprofit corporation organized for that purpose.

11 - Memberships/Sponsorships

Additional Required Fields: ***Beginning Term; Ending Term***

Membership: Departmental memberships in professional organizations are considered and processed as a services agreement. Memberships in professional organizations for represented employees are governed by bargaining agreements and payment is by way of reimbursement; memberships in professional organizations for non-represented employees are governed by DPA rules and payment is by way of reimbursement.

Dept. Delegation No

The Delegation Number identifies the specific type of delegated purchasing authority for which the department has been given authorization to acquire goods and/or IT goods and services. This field can hold up to 20 characters. There are no restrictions in this field, therefore dashes, spaces, numbers, letters, etc. are acceptable.

Note: Contract Types that require a Department Delegation Number include IT Goods, IT Services, IT Consulting Services, Non-IT-Goods (Commodities) and Interagency Agreements for select data centers. A Department Delegation number is not required if the Contracting Method is a CMAS or MA as described in the Contracting Method drop down data field. Once a “formal” delegation for all “leveraged procurement agreements” (these include CMAS and MA’s) is granted, that number **must** be included in the “Delegation #” field.

Use a Delegation Number:

- Goods Base Delegation Number - For the acquisition of goods valued at $100 - $25,000, and/or for goods valued at $5,000 - $99,999.99 when acquired under GC § 14838.5.
- Information Technology (IT) Base Delegation Number - For the acquisition of IT goods and services valued to $500,000.
- Expanded, Special, and One-Time Delegation Number - For the acquisition of goods and IT goods or services which exceed the base delegation limits.

Do Not Use a Delegation Number: Acquisitions for non-IT services may not be acquired under the department's delegated purchasing authority; therefore if entering into a non-IT "service" contract, leave this field blank.

The delegation number signifies that the department has been granted delegated purchasing authority by DGS-PD to make purchases as applicable to the specific type of delegated authority granted.

All purchase orders prepared using delegated purchasing authority **must** be prepared using the Contract/Delegation Purchase Order (CDPO) (Std. 65). The delegation number is entered in the "Contract/Delegation Number" box on the Std. 65.

- **Goods Base Delegation Number** - (example: 9-02-1234) Issued for the acquisition of materials, supplies, and equipment up to $25,000 per transaction, or the department's delegated purchasing authority limit as specified in the department's Delegation Authority Approval Memorandum. If acquiring a purchase under GC § 14838.5, departments may make purchases up to $99,999.99 under their Goods Base Delegated Purchasing Authority. See Delegation Guidelines for Goods.
- **Information Technology (IT) Base Delegation Number** - (example: IT-123) Issued for the acquisition of information technology and telecommunications goods and services up to $500,000 per transaction, or the department's delegated purchasing authority limit as specified in the department's Delegation Authority Approval Memorandum. See Delegation Guidelines for Information Technology.
- **Expanded Delegation Number** - (example: 9-02-9123) Issued for the acquisition of goods, information technology or telecommunications goods and services that exceed the base delegation limits. An expanded delegation is a general expansion of authority with no restrictions on the type of goods a department can acquire. See Delegation Guidelines for Expanded Delegations.
- **Special Delegation Number** - (example: 9-02-9123) Issued for the acquisition of goods, information technology or telecommunications goods and services that exceed the base delegation limits. A special delegation is generally for a specific

type of goods or group of identified goods. See Delegation Guidelines for Special Delegations.

- **One-Time Delegation Number** - (example: DO-123) Issued for the acquisition of goods, information technology or telecommunications goods and services that exceed the base delegation limit, but the department is not seeking a special or expanded delegation. Generally, a procurement conducted under this type of delegation is reviewed and approved by PD before the contract is issued.

Description of Goods/Services* - Required Field
Describe the goods and or services related to this contract, i.e., if the contract is for services, describe briefly the contractor deliverables. Be as concise as possible and include key words that might be used later to search by.

Contractor Name* - Required Field
Enter the complete name of the contractor. **Do not abbreviate or use acronyms. Do not enter the Contractor's address or telephone number.**

Dept. Contract No./P.O. No. * - Required Field
The Contract or Purchase Order number is a unique identifier based on the awarding authority's numbering scheme. This number is assigned to the transaction by the user's department/agency.

PIN No.
The PIN Number is the Department of General Services Procurement Information Network (PIN) number assigned by the Procurement Division for a specific contract. Once awarded, either through a one-time competitive buy, or an order against a contract (e.g., master, SCC), PIN generates this unique identifier. Some buyers may call this a Release Order. (PIN terminology).

Note:
If the contract does not have a PIN number leave this field blank.

Financed or Leased
Yes or No buttons. Click on the ***Yes*** or ***No*** button to indicate if this contract is financed or leased.

If the user selects "**Yes**", that means that the contract requires Financing **or** Leasing.

If the user selects "**No**", that means the contract is **neither** Financed **nor** Leased.

Vendor FEIN
Enter the entire Federal Employer Identification Number (FEIN) or the entire Tax Identification or Social Security Number. This number **must** be a 9 digit numeric value with no formatting such as dashes (-) or periods (.) between the numbers. If the number is more or less than 9 digits and contains characters other than numbers, you will see a message stating that it must be 9 numeric digits with no formatting. You will not be able to enter this contract unless data is entered into this FEIN field.

The only time the user will be able to see the entire number on the screen is when they add a new contract or a new amendment. All other SCPRS views will contain only the last 4 digits of the FEIN with an 'X' substituted for all other numbers.

Go to Section 3a to continue the **Add Contract** part of the User Manual

Section 3a
Add Contract (continued)
SCPRS
August 12 2003

Contracting Method ***** **-** Required Field; pull-down box
Use the ***Contracting Method*** pull down list to select the method used for this contract. The system defaults the value of the contract type to the first item on the list, i.e., 1 - Competitive Bid (CB).
This box permits the user to select from a list of choices for contract type. One of the choices **must** be selected. (If you feel that you need a choice that is not available, please send a message to the SCPRS staff through the Feedback link.)

1 - Competitive Bid (CB)
Do not use. Select another Contracting Method. This type will be eliminated from the system in the near future.

2 - Non-Competitive Bid (NCB)
Select this contracting method if the contract/amendment is exempt from competitive bidding based on an NCB application submitted to and approved by DGS.

For information regarding NCBs, refer to Management Memo 03-10 and any subsequent amendments thereto. MM 03-10 is located at the Procurement Division's web site http://www.dgs.ca.gov/pd.

3 - Master Agreements (MA) Do not use. Select another Contracting Method. This type will be eliminated from the system in the near future.

4 - CMAS
California Multiple Award Schedule (CMAS) – Orders issued against DGS/PD developed CMAS agreements.

The CMAS contracts are established using products, services and prices from already existing competitively assessed and cost compared multiple award contracts. The products, services and prices are primarily from the federal General Services Administration (GSA) multiple award schedule program Federal General Services Administration (GSA) but not exclusively. To these products, services and prices, we add California contract terms and conditions and procurement codes and policies and establish a totally independent California contract.

The contracts are utilized statewide by both California State and local government agencies under authority from the Department of General Services. Agencies make best value purchasing decisions according to their own business needs such as price, warranty, and supplier performance.

5 - Emergency

Emergency is defined in PCC §1102 as "a sudden, unexpected occurrence that poses a clear and imminent danger, requiring immediate action to prevent or mitigate the loss or impairment of life, health, property, or essential public services."

6 - Statutorily Exempt

Contracts exempt by statute include those referred to in MM 03-10, including any revisions thereto. Management Memo 03-10 is located at the Procurement Division's web site http://www.dgs.ca.gov/pd.

7 - Special Category NCB

Select this contracting method if the contract/amendment is exempt from competitive bidding based on DGS policy, as set forth in Management Memo 03-10 Attachment D (and any subsequent amendments thereto) or if the contract/amendment is exempt from competitive bidding based on a categorical NCB application submitted to and approved by DGS. MM 03-10 is located at the Procurement Division's web site http://www.dgs.ca.gov/pd.

8 - CB-GC 14838.5/14838.7

Competitive Bid (CB) – Government Code 14838.5
Awards made to California-certified small business, including a microbusiness, or to a disabled veteran business enterprise contractor pursuant to GC 14838.5/14838.7. GC 14838.5 is a simplified process that applies to the procurement of goods and services. GC 14838.7 is a simplified process that applies to construction services estimated not to exceed the project level established and adjusted periodically by the Department of Finance ($120,000 for FY 02/03) in accordance with PCC10105.

9 - CB-Formal

CB - Formal – Formal competition, based on the following:

- IT Goods and Services -- $500,000 or more
- Non-IT Goods (Commodities) -- $25,000 or more
- Non-IT Services -- $5,000 or more

As described in the California Acquisitions Manual § 3.2.2.b.5:

A written solicitation, including either Information Technology (IT) model contract language or General Provisions, or a combination of the two, developed in accordance with established practices for relatively high dollar, highly complex procurements and in accordance with statutory requirements.

10 - CB-Informal

CB – Informal – Informal competition, based on the following:

- IT Goods and Services -- less than $500,000
- Non-IT Goods (Commodities) -- less than $25,000

As described in California Acquisitions Manual § 3.2.2.b.6:

A type of solicitation that can be conducted verbally (by telephone) or in writing and used for the purchase of goods (including information technology) or information technology services of relatively low value and complexity in accordance with statutory requirements.

11 - CB-Request for Qualifications (A&E)

Selection for professional services of A&E consultants must be on the basis of demonstrated competence and on the professional qualifications necessary for the satisfactory performance of the services required at a fair and reasonable price. The Request for Qualifications (RFQ) is the solicitation document that sets out the criteria for determining the best qualified professional for the project. The RFQ process is followed in accordance with SCM 11.05 and 11.06.

12 - MA Pre-Qualification Agreements

Master Agreements (MA) – Pre-Qualification Agreements awarded only by DGS-PD.

Master agreements established by DGS-PD, that represent a listing of suppliers who have been pre-qualified typically on the basis of experience and financial status. Users then issue solicitations to the suppliers in pre-defined categories. Award of a contract to one of these pre-qualified suppliers is based on best value as determined by the user.

13 - MA Statewide Commodity Contracts

Orders issued against Statewide Commodity Contracts established by DGS-PD

As defined in Public Contracting Code: PCC §10290 "Statewide contract" means a contract awarded by the Office of Procurement to one or more suppliers for the acquisition of specified goods for a period of time, at a price, and in an amount set forth in the contract.

14 - MA State Price Schedule

Orders issued against Statewide Price Schedules established by DGS-PD.

As defined in Public Contracting Code: PCC § 10290:

"Price schedule" means an agreement between the Office of Procurement and a supplier under which the supplier agrees to accept orders from the office or a state agency for specified goods at set prices for a specified period of time but which does not obligate the office or state agencies to contract for the specified goods from the supplier.

15 - MA Master Service Agreement

Orders issued against Master Service Agreements established by DGS-PD

As described in the State Contracting Manual § 3.04:

There are two types of generally acceptable master agreements: statewide and intra-agency.

A. Statewide master agreements are contracts bid by DGS for services and consulting services that are used by many departments.
    1. Master Agreements take advantage of the state's large buying power. Prices are often less than those a single agency could obtain on its own. Any state agency can use the statewide Master Agreements through the use of a subscription agreement, typically using a Standard Agreement Form.
    2. Master Agreements take care of the bidding process and other administrative details. Depending on the particular agreement, Civil Service justification (GC §19130), and DVBE goals may or may not have been dealt with.
    3. Master Agreements allow an agency to obtain needed services quickly

and easily, avoiding the delay and uncertainty of the bid process. Some Master Agreements, especially those with multiple vendors, have User Guides that explain how the contracts are to be used. User Guides for different agreements have varying requirements. It is the responsibility of the using agency to follow the requirements in the User Guide for that particular Master Agreement.

4. Some subscription contracts to Master Agreements developed by the Department of Personnel Administration and the Procurement Division, DGS, cannot exceed $100,000. Before developing a subscription contract, check with the Master Agreement Contract Manager.

Note: In rare instances DGS has given authority to another agency to bid and supervise a Master Agreement.

B. Intra-agency master agreements are contracts let by an agency for the use of the divisions of that agency. Intra-agency master agreements may differ from agency to agency, depending on program needs and statutory authority. Any agency wishing to enter into such a master agreement should discuss the agreement with its DGS/OLS attorney.

16 - MA Master Rental Agreement

Orders issued against Master Rental Agreements established by DGS-PD

Same benefits of a Master Service Agreement (repeated below), however a Master Rental Agreement generally includes the product, lease term options (i.e. 12 months, 24, months…) maintenance service and warranty.

17 - MA Master Purchase Agreement

Statewide Master Purchase Agreements (MPA's) are one type of Master Agreement contract bid by DGS for Information Technology products and services. These MPA's are used by many departments.

1. MPA's take advantage of the state's large buying power. Prices are often less than those a single agency could obtain on its own. Any state and local agency can use the statewide MPA's through the use of a subscription agreement, typically using a Purchase Order, Standard Agreement Form, or CAL-Card.
2. MPA's take care of the bidding process and other administrative details. Depending on the particular agreement, Civil Service justification (GC §19130), and DVBE goals may or may not have been dealt with.
3. MPA's allow an agency to obtain needed services quickly and easily, avoiding the delay and uncertainty of the bid process. Master Purchase Agreements have User Guides that explain how the contracts are to be used. User Guides for different agreements have varying requirements. It is the responsibility of the using agency to follow the requirements in the User Guide for that particular MPA.

2. MPA's developed by the Procurement Division, DGS, cannot exceed $500,000 unless an exemption request is approved by DGS in advance.
3. Western States Contracting Alliance (WSCA) contracts are also considered MPA's. These contracts also have User Guides that explain how the contracts are to be used. It is the responsibility of the using agency to follow the requirements in the User Guide for that particular contract.

Leveraged Contract No.
If the ***Contracting Method*** is a **CMAS or Masters**, a leveraged contract number must be entered. All other contracting methods do not use a leveraged contract number. Do not use spaces between numbers. This field can hold up to 20 characters.

Small Business
Yes or No button. Defaults to ***No***.
Use the ***Yes*** or ***No*** button to indicate if this is a **Certified** Small Business vendor.

Disabled Veteran (not available at this time)
Yes or No button.

Micro Business (not available at this time)
Yes or No button.

Original Beginning-Term* - Required Field; quick select calendar next to box
Enter the original beginning term of this contract. This date may differ from the Date of Entry of Original Contract. The data format is month, day, year order (MM/DD/YYYY). For example: March 22, 2003 is 03/22/2003.

Original Ending Term - Quick select calendar next to box
Enter the original ending term of the contract. This is not the date resulting from extensions due to amendments to the original contract. For certain contract types, no entry will be required in this data field. The data format is month, day, year order (MM/DD/YYYY). For example: March 22, 2003 is 03/22/2003.

Original Contract Amount* - Required Field
Enter the total amount of the original contract and include tax if it is part of the total. This should not include amounts resulting from amendments to the original contract.

It is not necessary to add a dollar sign. If cents are omitted, the SCPRS will assume two digit zeros. If cents are included in the amount, they must be preceded with a dot, for example 2500.56

The SCPRS system does not separately identify the tax cost for any contract, amendment or purchase orders entered. To aid in the searching, identification and reporting of SCPRS information enter the total dollar amount that is printed on the purchasing document. If tax is included in the document total, it should be included in

the SCPRS data. If tax is not included, it should not be included in the SCPRS data. With this in mind, the SCPRS Reports include tax to the extent that it was noted on the documents used to input data.

The user **must** click on the gray ***Submit*** button in order for the data to be entered into the system and for the generation of a SCPRS Registration Number for this contract. You **must** have a registration number for each contract.

> **Note**: If you were in the process of adding contract or amendment information and did not click on the gray ***Submit*** button before you logged out of the system or if the system logs you off automatically as a result of the "Default" 20 minute system idle time, the data was not saved and will need to be re-entered.

Once the required information is submitted, the system issues a SCPRS registration number. ***This is NOT the number known as the contract number***. The user is notified by a web receipt on the screen and by an email receipt. The SCPRS registration number has the following format:

> 4 digit numeric organizational number from Department of Finance plus a
> 4 digit numeric date in the order of Month Day Year plus a
> sequential number assigned by SCPRS.

The 4 digit numeric organization codes are assigned and maintained by the Department of Finance (DOF). Further information about the DOF codes and their uses are available at http://www.dof.ca.gov/html/calstars/ucm.htm. The second bullet near the bottom of the DOF page provides a link to alphabetical, numerical, or structural listings of the organization codes.

Example: 1770~~10~~0703**100** (bold type is not present in real number)

1770	DOF organization code
0703	July 2003
Sequential Number	**100 (this can be any number of digits from 2 digits for sequential number 12 to 4 digits for sequential number 3,421.)**

Once a contract has been registered, the user can add amendments to the parent contract. Each contract amendment is issued a number. A period and the amendment number will be added to the parent contract number. Example of amendment 1 for the above contract: 1770~~10~~0703100.1

> In the first few months after the SCPRS went live, a handful of departments entered data during FY02/03. These early entries were assigned an additional two digits in the numeric schema. Following the four digit DOF organization code, the Contract

Type number (00 through 10) was added. The number would have looked like: 1770**10**0703100. The number 10 represents the Contract Type. Any amendments made to these early contracts even after July 2003 will still have the Contract Type number as part of newly assigned amendment SCPRS Contract Registration numbers.

This SCPRS registration number is a very important identifier for this contract and should be noted on the newly revised STD 65 or the STD 213. If you need to obtain the SCPRS Contract Registration Number and it is not located on the documents you have available, a search of the SCPRS database can be conducted by the agency's contract number, the purchase order number, vendor name, etc., in the Search Contracts link.

Section 4
Add Amendment
SCPRS

Procurement Division, DGS
July 1 2003

Amendments

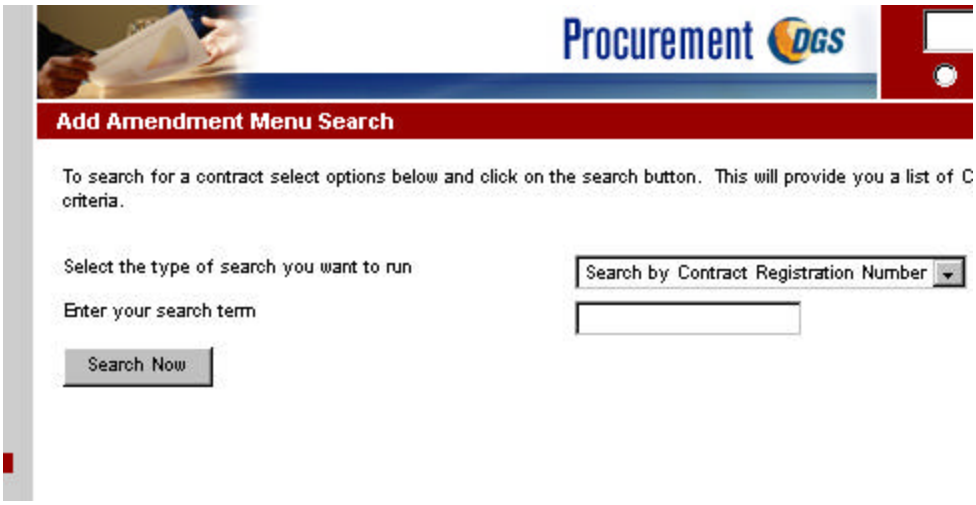
An amendment is a formal modification to a contract. It should contain the same degree of specificity for changes that the original contract contained for the same item. Types of amendments include Standard Agreement Amendments and Purchase Order Changes (POC's).

When you click on the link identified as **Add Amendment** you see the Add Amendment Menu Search screen shown below. *Please be aware that you are only allowed to add amendments to your own department/agency's contracts unless you have special privileges.* If you are a DGS Procurement Professional User, or have other viewing rights, refer to the Users Manual written specifically for those who are not End Users.

> **Note**: Once the system has been in operation and has stored a large volume of data that is multi-year, a search capability for date ranges will be added to allow the user to search more efficiently.

The drop down box on this screen offers a number of search options to locate contracts previously entered into the SCPRS. Once an item is selected from the drop down box, another entry box will appear for the user to enter specific information for that type of search.

1. *Don't Specify (Find All Contracts)* is the default selection. If you click on the gray ***Search Now*** all contracts for your department will appear.
2. *Search by Contract Registration Number*. A new screen with an empty box for the Contract Number will appear as seen below.

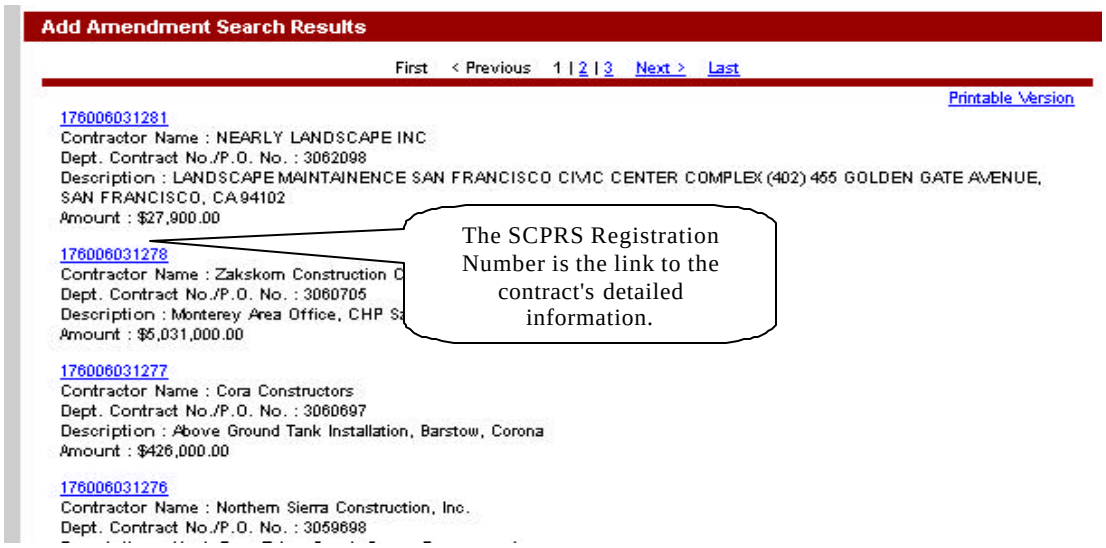


Enter any part of the SCPRS Contract Registration Number into the empty box. Click on the gray ***Search Now*** button. This is the unique number assigned by the SCPRS when a contract is first entered. A part of the number, such as 4-digit organization code type or a 4-digit date will return those contracts that match. (See Section 3 of the Users Guide for more information on the SCPRS contract registration number.) If the number is invalid as shown in the example below, the SCPRS shows you a screen that states that no records were found for the number you entered i.e., 1 - 0 out of 0 Records. Click on the browser's gray ***Back*** button to try again.

3. Select *Search by Description* and enter into the new box a word or phrase that is part of the description entered when the original contract was first added to the SCPRS. Click on the gray ***Search Now*** button.
4. Select *Search by Contractor Name* and enter part of or the entire contractor's name in the new box. This search is not case sensitive and 'MARTIN' will be found as easily as 'martin', but be sure to include blank spaces, periods or commas if the Contractor Name includes them. Click on the gray ***Search Now*** button.
5. Select *Search by Contract Type* and from the new drop down box that appears select one of the *Contract Types* as shown in the following screen. Click on the gray ***Search Now*** button.
6. Select *Search by Contract Method* and from the new drop down box that appears select one of the *Contract Methods*. Click on the gray ***Search Now*** button.
7. Select *Search by Dept. Contract/PO Number* and enter part of or the entire contract/PO number into the new box that appears. Click on the gray ***Search Now*** button.

Search Results

If your search identified contracts in the system, the screen below appears and lists pertinent information for each match. Once you have identified the contract to be amended, click on the registration number (in blue) on the first line of contract information (see screen above). This link takes you to the **Add Amendment** page for that contract.

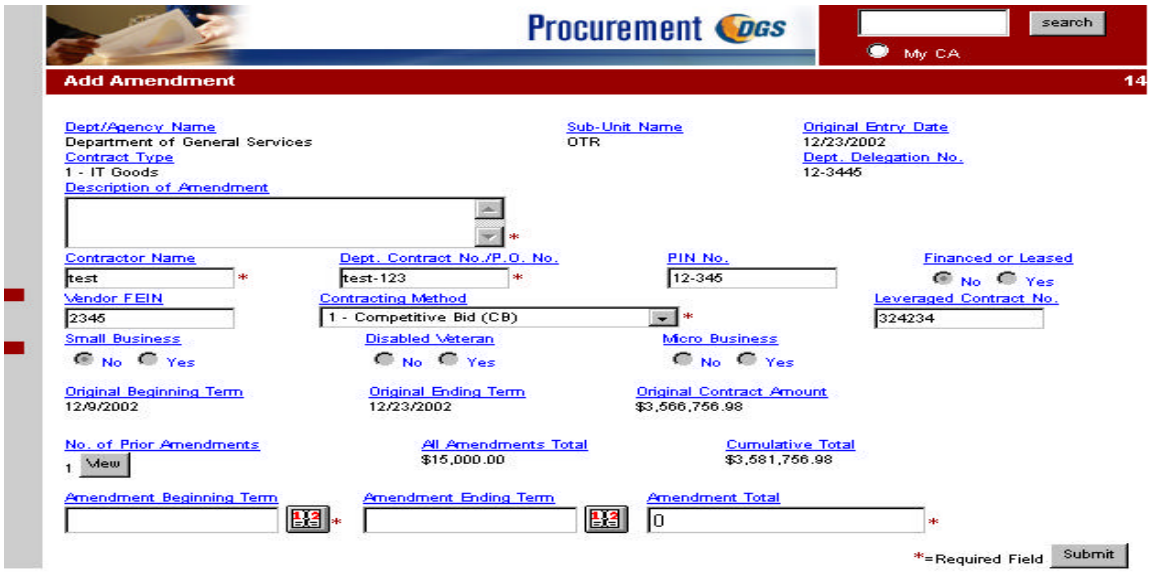


The contract list can be printed as seen above by using your browser or if you click on the link in the top right corner named Printable Version you can print a list without all the web site frames and colors.

Each listed contract includes the following pieces of information:

SCPRS Registration No.	Generated by SCPRS and created when the contract is first entered into SCPRS.
Contract Name	Provided by the user.
Dept. Contract No./P.O. No.	Provided by the user.
Description	Provided by the user.
Amount	**This is the initial contract amount and does NOT include any amended dollars**.

The **Add Amendment** screen is shown below.



Changing Previously Entered Data

Many of the boxes on the **Add Amendment** page already contain information that was entered when the original contract was added to the system. Some of the boxes allow changes to this earlier data and some do not. If you need to edit or change data of a previously entered contract or earlier amendment, you **must contact SCPRS staff** who will do it for you. Go to the Request Corrections/Feedback link at the left of the screen in the gray area.

If the screen permits you to change data from that entered in the original contract, the original contract data will not change. Only the data of that particular amendment will show the changed information. When additional amendments are added, the default data for all new amendment will always be that of the initial contract.

Public Works Contract Type and Change Orders

A Change Order is a written order issued by the State which is used to determine adjustments in the contract based on 1) a change in the work, 2) the amount of the adjustment in the Contract amount, and 3) the extent of the adjustment in contract time. All information that is changed as a result of Change Orders should be reflected in SCPRS. Due to the nature and number of Change Orders, they may be put in batches

and entered into the system with cumulative and/or final changes to reflect the current status of the contract at the time of entry. Batched means that more than one Change Order may be combined together and entered into the SCPRS as a single amendment.

Note: Change Orders may be batched and entered weekly/monthly/quarterly at the discretion of the entry state agency. Each batch entry made into the system must reflect the numbering sequence or other identifiers of each Change Order in the ***Description of Goods/Services*** field.

The **SCPRS amendment number for Public Works contracts will not** reflect the actual numbers on change orders and amendments. The primary purpose in this version of the SCPRS is to capture significant information, such as dollars, scope or schedule adjustments, for change orders and amendments. More specific registration numbering for Public Works contracts will be addressed in future versions of the system.

Go to Section 4a to continue the **Add Amendment** part of the User Manual

Section 4a
Add Amendment (continued)
SCPRS
July 1 2003

Add Amendment Fields

The following pages in the User's Guide address each box on the **Add Amendment** page. For those boxes that already contain data, detailed descriptions are available in the **Add Contract** Section 3 of the User's Manual and are not repeated here. The boxes discussed below are listed as they appear on the screen, starting at the top of the screen and going from left to right.

Boxes that have a red asterisk to their right are required fields and **must** contain data. If a required field does not contain data when the gray ***Submit*** button on the bottom of the screen is clicked, you will get a message and the system will not allow you to continue.

The first fields listed below show the data that was entered in the original contract and cannot be changed on this SCPRS screen by the user. *If any of this data needs to be changed, contact SCPRS.*

Dept/Agency Name
Sub-Unit Name
Original Entry Date
Contract Type
Dept. Delegation No.

Description of Amendment* - Describe the reason for the amendment, including additional goods or services, increases in contract amount, extension of term, changes in contract terms and conditions, etc. This field must contain new information relevant to the new amendment being added.

> **Note**: If the amendment is a batch of Public Works Change Orders, indicate Amendment or Change Order Number(s) in this box - for example, enter "Change Order Numbers 1-33".

Contractor Name - Defaults to original contract contractor. Any changes made subsequent to the original contract entry are reflected only in the new amendment and not in the initial contract data or in subsequent amendments.

Dept. Contract No./P.O. No. * - Defaults to original contract number. Changes are reflected only in the new amendment and not in the initial contract data or in subsequent amendments. If your department uses a numbering convention that identifies amendments, enter it in this box.

Note: The SCPRS registration number assigned by SCPRS identifies the amendment according to the SCPRS convention (see the end of Section 3, **Add Contract)**. The SCPRS registration number is a different number than the ***Dept. Contract No./P.O. No***. In the SCPRS a period and the amendment number are added to the parent contract number for each contract amendment.

PIN No. - Procurement Division's Purchasing Information Network number. Defaults to original contract data. Any changes are reflected only in the new amendment and not in the initial contract data or subsequent amendments.

Financed or Leased - Defaults to original contract data. *If this data needs to be changed, contact SCPRS.*

Vendor FEIN - Defaults to original contract data. Changes are reflected only in the new amendment and not in the initial contract data or in subsequent amendments.

Contracting Method* - Defaults to original contract data. Changes are reflected only in the new amendment and not in the initial contract data or subsequent amendments.

Leveraged Contract No. - Defaults to original contract data. Changes are reflected only in the new amendment and not in the initial contract data or subsequent amendments.

Small Business - Defaults to original contract data. *If this data needs to be changed, contact SCPRS.*

Disabled Veteran - Not available at this time.

Micro Business - Not available at this time.

Original Beginning Term - Defaults to original contract data. *If any of this data needs to be changed, contact SCPRS.*

Original Ending Term - Defaults to original contract data. *If any of this data needs to be changed, contact SCPRS.*

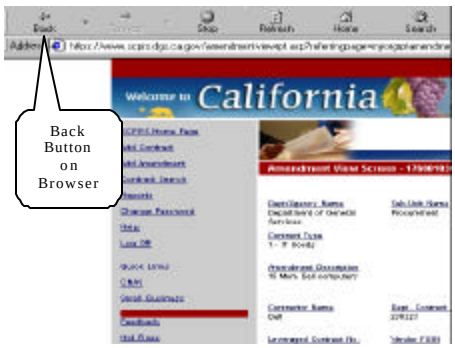
Original Contract Amount - Defaults to original contract data. *If any of this data needs to be changed, contact SCPRS.*

No. of Prior Amendments
The number of prior amendments stored in the SCPRS is located to the left of a small gray button called ***View***. Click on the ***View*** button to see amendments previously added to this contract. See screen below. The example shows that there have been 2 different amendments added to this contract. Note that the last digit of the SCPRS registration number indicates the number of the amendment.

If you click on the blue text on the right titled 'Printer Friendly Version', a window opens on top of the SCPRS screen with the same five lines of amendment information, but without the colored frames, background text or pictures. To print this view, click on the gray ***Print*** button on the menu on the top of the newly opened window. (If needed, please contact your department's computer services or help desk staff for assistance with printing.) Click on the small 'X' in the far right top corner of this window to close the printer friendly version view.

Click on the blue SCPRS registration number on the first line of information of one of the amendments to select an individual amendment to view.

Once an amendment is selected to view, the screen below appears. This page is a 'read-only' view of the amendment information. You are not allowed to change any information yourself once the contract or amendment has been submitted to SCPRS, but must contact SCPRS staff to do the changes.



Note: To leave the amendment view screen shown above, click on the Browser's gray ***Back*** button that is in the upper left corner of your screen. Click on the ***Back*** button again to return to the **Add Amendments** page.

All Amendments Total - This total dollar amount is automatically calculated by SCPRS based on all previously entered amendments. This total does **not** include initial contract dollar value.

Cumulative Total - This total dollar amount is automatically calculated by SCPRS based on original contract amount plus all previously entered amendment totals (and/or Public Works Change Orders). If an amendment reduces the dollar value of the contract and the amendment total is entered as a negative dollar amount, this cumulative total will subtract the negative amount from the previous total.

Amendment Beginning Term* - Enter the beginning term of the amendment. The data format is month, day, year order (MM/DD/YYYY). For example: March 22, 2003 is 03/22/2003.

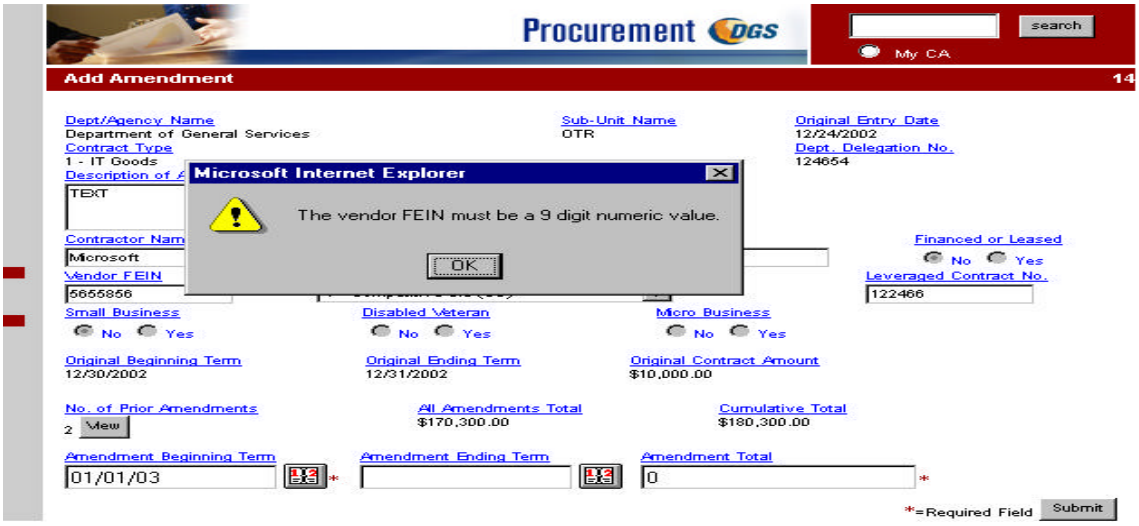
Amendment Ending Term - Quick select calendar; see above for instructions. Some amendments will not have an end term. If this is the case, leave this field blank. The data format is month, day, year order (MM/DD/YYYY). For example: March 22, 2003 is 03/22/2003.

Amendment Total* - Enter only the total dollar amount of this new amendment and include tax if it is part of this total. It is not necessary to add a dollar sign. If cents are omitted, the SCPRS will assume 2 digit zeros. If cents are included in the amount, they must be preceded with a dot, for example 2500.56. Negative dollar amounts of amendments are allowed and will be subtracted from the cumulative total of the contract.

> The SCPRS system does not separately identify the tax cost for any contract, amendment or purchase orders entered. To aid in the searching, identification and reporting of SCPRS information enter the total dollar amount that is printed on the purchasing document. If tax is included in the document total, it should be included in the SCPRS data. If tax is not included, it should not be included in the SCPRS data. With this in mind, the SCPRS Reports include tax to the extent that it was noted on the documents used to input data.
>
> **Note:** If the amendment is a batch of Public Works Change Orders - Enter total amount for amendment or batched change orders if there is a dollar change. SCPRS will add this batched dollar amount to the cumulative total.

The user **must** click on the gray ***Submit*** button in order for the data to be entered into the system.

If a user clicks on the ***Submit*** button and any required data is missing, the SCPRS will respond with a small box on top of the **Add Amendment** page that will tell you what piece of information is missing. Also, some data may require other data, such as a certain contract type may also require a delegation number. The amendment will not be accepted if the amendment data is incomplete or inaccurate. An example of an error message is shown below.



Note: You **must** click on the ***OK*** button in the small box in order for the error message box to disappear and to be able to enter the missing data.

Once the data is successfully submitted, the screen below appears.

In addition the SCPRS sends you an email confirmation of the new amendment such as shown below.

From: SCPRS Administrator [scprsadministrators@dgs.ca.gov]
To: gloria.santos@dgs.ca.gov
Cc:
Subject: SCPRS New Amendment Registration Confirmation

Dear Customer,

A new contract amendment has been registered with the State Contract and Procurement Registration System.

Contract Amendment Number: 176001120250.3
Contractor Name: Microsoft
Amount of the amendment: $0.00
Cumulative amount for this contract: $180,300.00

Thank You
SCPRS Administrators
SCPRSAdministrators@dgs.ca.gov

Click on this link www.scprs.dgs.ca.gov to return to the State Contract and Procurement Registration System.

Note: If you were in the process of adding contract or amendment information and did not click on the gray ***Submit*** button before you logged out of the system or if the system logs you off automatically as a result of the "Default" 20 minute system idle time, the data was not saved and will need to be re-entered.

Section 5
Contract Search/Reports
SCPRS

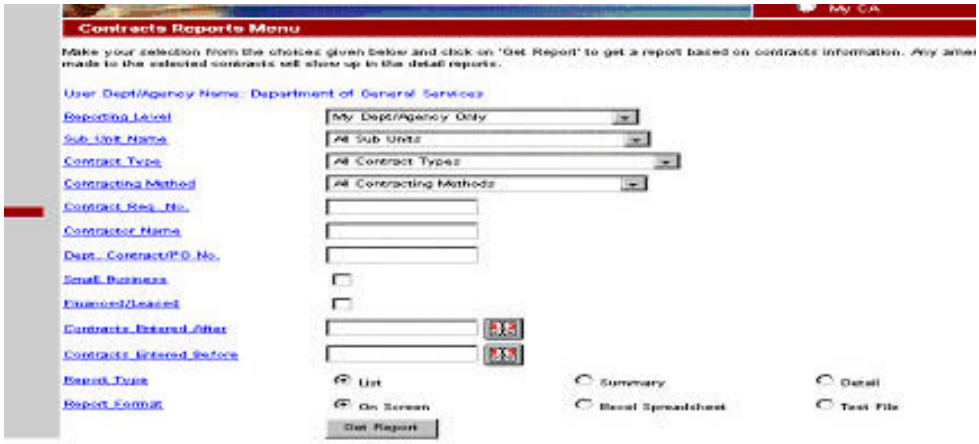
Procurement Division, DGS
July 1 2003

Contract Search

When you click on the link identified as Contract Search in the left gray area of the screen, you see the Search Contract Menu screen shown below.

The drop down box on this screen offers the same options as those seen in the **Add Amendment Menu Search** discussed in Section 4 and will not be repeated here.

After you make your selection and click on the ***Search Now*** gray button, the contracts that match your search appear on the screen. Click on the registration number (in blue) on the first line of contract information to go to the contract data screen shown below. This contract and its amendment data can be viewed or printed.



Reports

When you click on the link for Reports in the gray area of your screen, you will see the Contract Registration Reports Menu screen shown below.

Contracts for Department of General Services

All Contracts & Amendments | Summary | Detail

Registration #	Entry Date	Original Contract Amount	No. of Amendments	Cumulative Total With Amendments	Report Type	Report Type
17600300345	2/27/2003	$0.00	1	$24,000.00	Summary	Detail
17600300346	2/27/2003	$86,000.00	1	$150,500.00	Summary	Detail
17600700356	2/28/2003	$467,400.00	1	$530,226.00	Summary	Detail
17600300357	2/28/2003	$24,500.00	5	$68,000.00	Summary	Detail
17600300359	3/3/2003	$195,000.00	8	$1,747,147.00	Summary	Detail
17600300367	3/3/2003	$0.00	1	$80,540.00	Summary	Detail
17600300368	3/3/2003	$51,000.00	1	$364,291.00	Summary	Detail

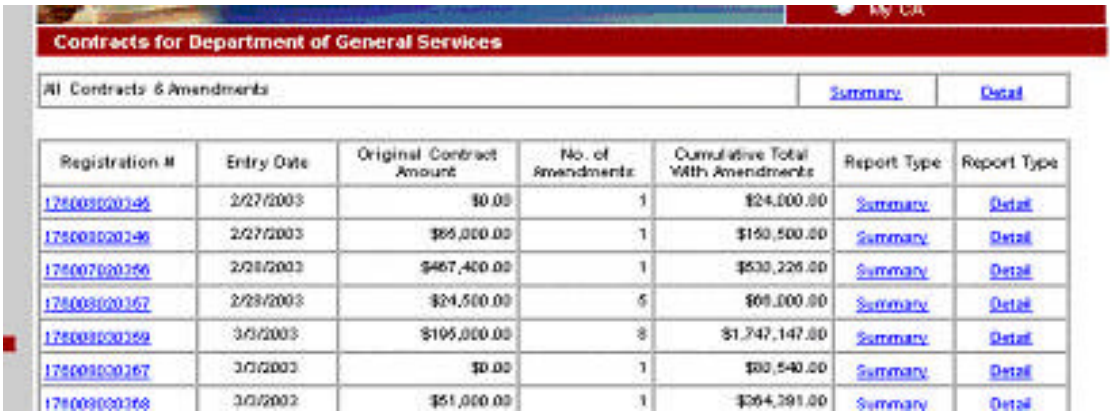
The following items are arranged in the order they appear on the screen from top to bottom. **Note**: Each item underlined in blue text can be clicked for a description of the item.

After all the specifics for a report has been entered, remember to click on the gray ***Get Report*** button at the bottom of the screen to run the report.

1. **Reporting Level**: The SCPRS default is 'My Dept./Agency Only'. This will permit viewing of data at your level in the Department of Finance's Uniform Code Manual organizational structure.
2. **Sub Unit Name**: This drop down box allows the user to select from all the Sub Units that are currently in the system and associated with previously entered contract data.
3. **Contract Type**: This drop down box offers selection of a specific contract type for their report. Options include "All Contract Types", "All IT Contracts" or "All Non-IT Contracts".
4. **Contracting Method**: This drop down box offers selection of a specific contracting method. The default 'All' means all methods will be included in the report.
5. **Contract Reg. No**.: This box allows the User to enter a specific SCPRS Contract Registration Number. The report will include data for only the one contract.
6. **Contractor Name**: This box permits the search to be restricted to a part or an entire contractor name. For example: "De" reports all vendors with Dell, Design or De-Activation in the name and "Dell" will return any vendor names with the word 'Dell', such as Dell, Dell Computers, or Dell Hardware.
7. **Dept. Contract/PO No**.: As with Contractor Name, the more specific the data entered in this box, the more refined is the search for matching data. An entry of "4" is less specific than one of "34" and will include more contracts.

8. **Small Business**: A click in this small square indicates that only Small Business contracts/amendments are to be included in the report.
9. **Financed/Leased**: A click in this square indicates that only contracts/amendments that are financed or leased are to be included in the report.
10. **Contracts Entered After**: This date refers to the date that the contract data was entered into the SPCRS. If a date is entered in this box on the report screen, all contract data entered after this date will be in the report. This is *not* the beginning date of the contract or amendment. (The gray button to the right of the box will bring up a monthly calendar that can also be used to enter a date.)
11. **Contracts Entered Before**: This date refers to the date that the contract data was entered into SPCRS. If a date is entered in this box, SCPRS contract entries made before this date will be in the report. (The gray button to the right of the box will bring up a monthly calendar that can also be used to enter a date.)
12. **Report Type**: The Report Type has three options: list, summary or detail. The items listed earlier will help to narrow and define the contracts in the report, while Report Type will define how much of the contract data is in the report.

List report type (On Screen report format)



Contracts for Department of General Services

All Contracts & Amendments	Summary	Detail

Registration #	Entry Date	Original Contract Amount	No. of Amendments	Cumulative Total With Amendments	Report Type	Report Type
17500[illegible]0346	2/27/2003	$0.00	1	$24,000.00	Summary	Detail
17500[illegible]0346	2/27/2003	$95,000.00	1	$150,500.00	Summary	Detail
17500[illegible]0356	2/28/2003	$467,400.00	1	$530,226.00	Summary	Detail
17500[illegible]0357	2/28/2003	$24,500.00	5	$66,000.00	Summary	Detail
17500[illegible]0359	3/3/2003	$195,000.00	8	$1,747,147.00	Summary	Detail
17500[illegible]0367	3/3/2003	$0.00	1	$80,540.00	Summary	Detail
17500[illegible]0368	3/3/2003	$51,000.00	1	$264,391.00	Summary	Detail

A click on any of the items that appear in blue underlined text will take you to specific data for that contract.

Summary report type (On Screen report format)

Contract Summary

Contract Reg No. :	176000020345	Contract Entry date:	2/27/2003
Dept /Agency Name:	Department of General Services		
Contractor Name:	LIONAKIS BEAUMONT DESIGN GROUP, INC.		
Contract Description:	Northern/Central Region #1 Retainer Budget Packages		
Contract Type:	0 - A & E (Architectural & Engineering)		
Contracting Method:	11 - CB-Request for Qualifications (A&E)		
Original Contract Amount:	$0.00		
Number of Amendments:	1	Cumulative Total:	$24,000.00

Contract Reg No. :	176000020346	Contract Entry date:	2/27/2003
Dept /Agency Name:	Department of General Services		
Contractor Name:	Dean F. Unger, AIA, INC.		
Contract Description:	Sonora Forest Fire Station-Relocate Facility Department of Forestry and Fire Protection Sonora, Tuolumne County, California		
Contract Type:	0 - A & E (Architectural & Engineering)		
Contracting Method:	11 - CB-Request for Qualifications (A&E)		
Original Contract Amount:	$99,000.00		
Number of Amendments:	1	Cumulative Total:	$150,500.00

Contract Reg No. :	176000020356	Contract Entry date:	2/28/2003
Dept /Agency Name:	Department of General Services		

Detail report type (On Screen report format)

Contract Detail

Contract Reg No. :	176000020345	Contract Entry date:	2/27/2003
Dept /Agency Name:	Department of General Services		
Sub-Unit Name:			
Contract Description:	Northern/Central Region #1 Retainer Budget Packages		
Contract Type:	0 - A & E (Architectural & Engineering)		
Contracting Method:	11 - CB-Request for Qualifications (A&E)		
Original Contract Amount:	$0.00		
Dept. Delegation No.:		Contract No./P.O. No.:	30532301
Contractor Name:	LIONAKIS BEAUMONT DESIGN GROUP, INC.	PIN No.:	
Leveraged Contract No.:		Financed or Leased:	No Yes
Vendor FEIN:	xxxxx7598	Small Business:	No Yes
Number of Amendments:	1	Cumulative Total:	$24,000.00
Amendment Reg No.:	176000020345.1	Amendment Entry Date:	2/27/2003
Amendment Description:	TAHOE BASE CENTER ACQUISITION CALIFORNIA CONSERVATION CORPS SOUTH TAKE TAHOE, CA		
Amendment Total:	24000	Contractor Name:	LIONAKIS BEAUMONT DESIGN GROUP, INC.
Amendment Comments:			

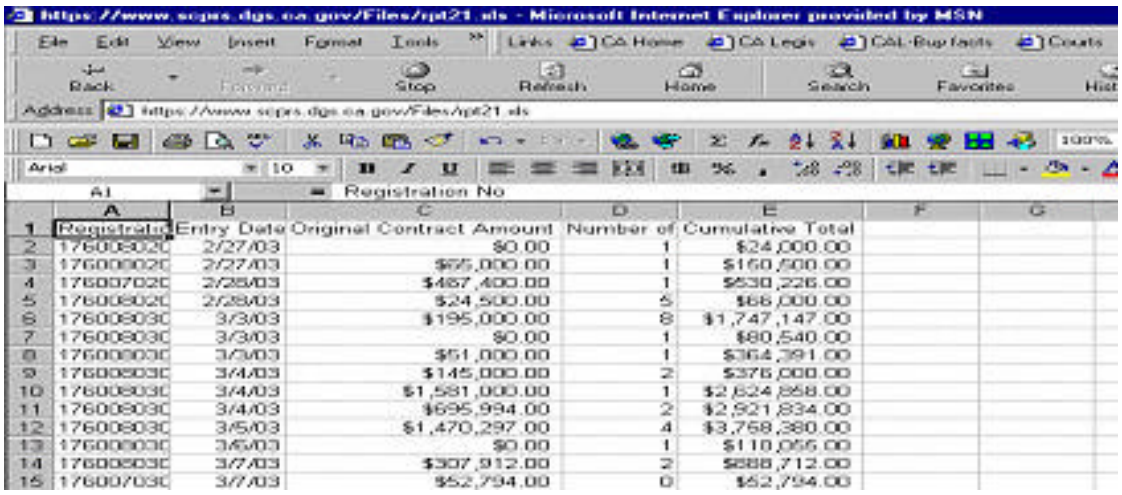
13. **Report Format**: The Report Format has three options: on screen, Excel Spreadsheet and Text File. The items listed earlier will help to define the contracts in the report, the report format defines how much of the contract data is in the report and the Report Format permits on screen views such as shown above as well as Excel or text format. The Excel report can be saved to your own computer to summarize and display the data as you would like. The text report can also be saved and used to import the data into other systems if desired. (To see directions to save the excel or text file, continuing reading Section 5.)

On Screen report format

If the user selects *On Screen* for the Report Format, the three different report types available include *List Option, Summary* or *Detail* and are shown above in item #12.

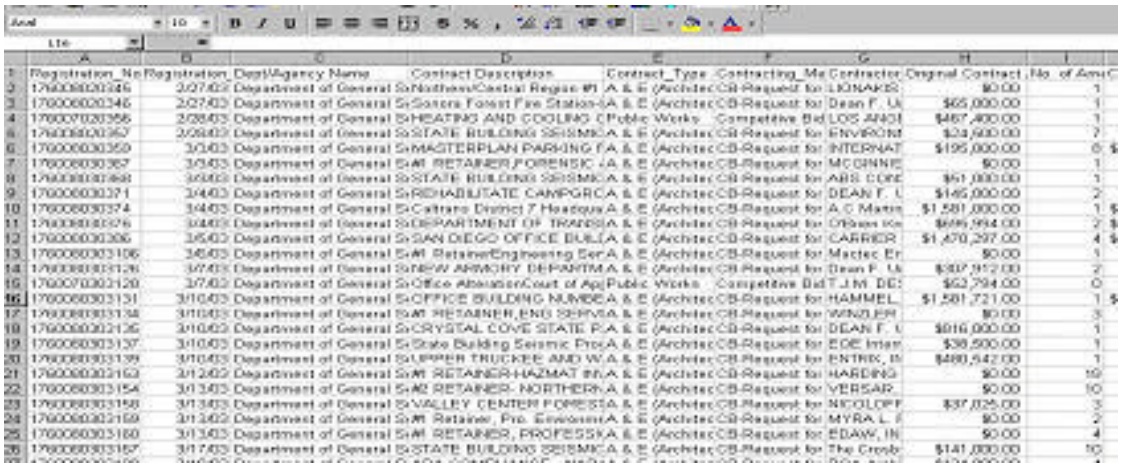
Excel Spreadsheet report format

- List Option report type

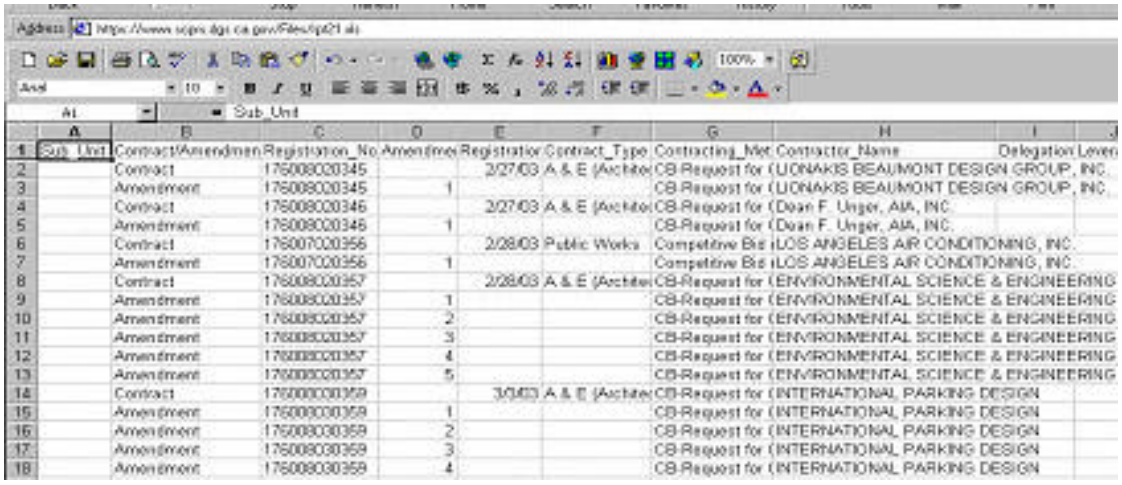


	A	B	C	D	E
1	Registration	Entry Date	Original Contract Amount	Number of	Cumulative Total
2	176008020	2/27/03	$0.00	1	$24,000.00
3	176008020	2/27/03	$65,000.00	1	$160,500.00
4	176007020	2/28/03	$467,400.00	1	$530,226.00
5	176008020	2/28/03	$24,500.00	5	$66,000.00
6	176008030	3/3/03	$195,000.00	8	$1,747,147.00
7	176008030	3/3/03	$0.00	1	$80,540.00
8	176008030	3/3/03	$51,000.00	1	$364,391.00
9	176008030	3/4/03	$145,000.00	2	$376,000.00
10	176008030	3/4/03	$1,581,000.00	1	$2,624,858.00
11	176008030	3/4/03	$695,994.00	2	$2,921,834.00
12	176008030	3/5/03	$1,470,297.00	4	$3,758,380.00
13	176008030	3/6/03	$0.00	1	$110,056.00
14	176008030	3/7/03	$307,912.00	2	$888,712.00
15	176007030	3/7/03	$52,794.00	0	$52,794.00

- Summary report type



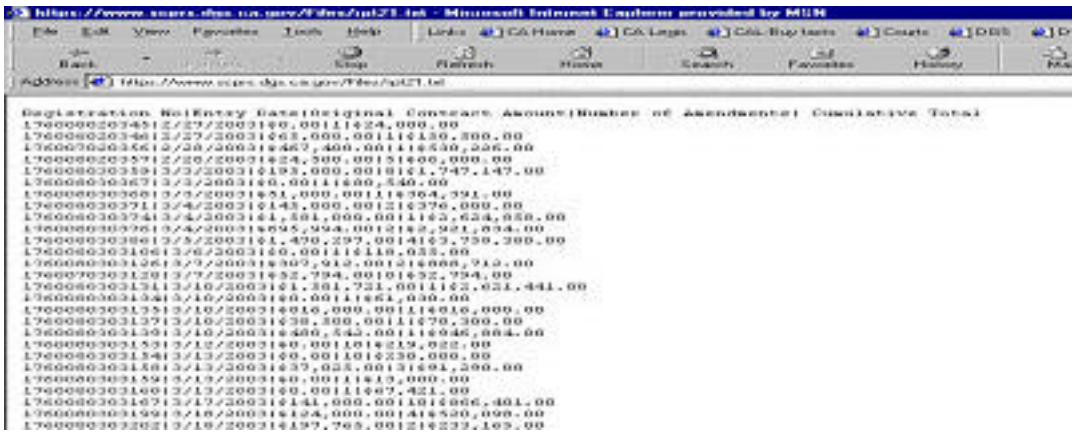
- Detail report type



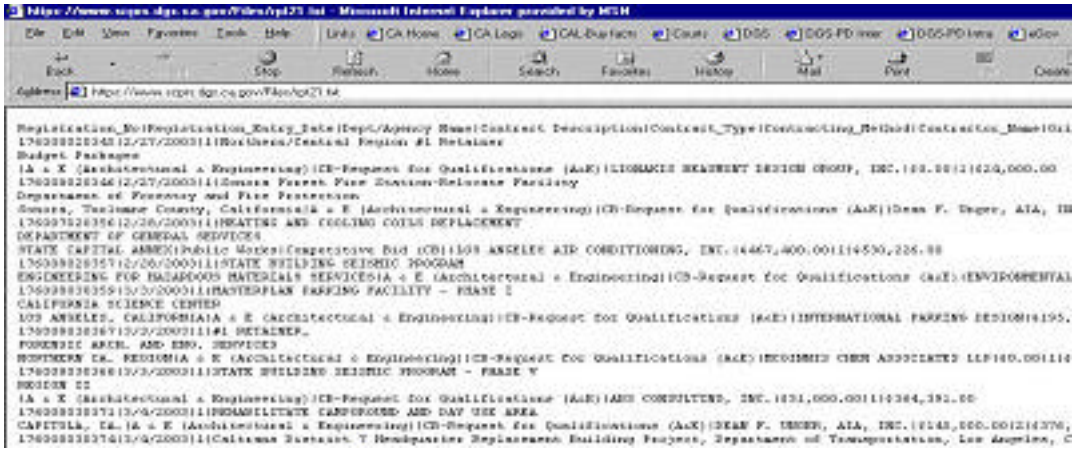
	A	B	C	D	E	F	G	H	I
1	Sub_Unit	Contract/Amendmen	Registration_No	Amendme	Registratior	Contract_Type	Contracting_Met	Contractor_Name	Delegation Leven
2		Contract	176008020345		2/27/03	A & E (Archite	CB-Request for	(UONAKIS BEAUMONT DESIGN GROUP, INC.	
3		Amendment	176008020345	1			CB-Request for	(UONAKIS BEAUMONT DESIGN GROUP, INC.	
4		Contract	176008020346		2/27/03	A & E (Archite	CB-Request for	(Dean F. Unger, AIA, INC.	
5		Amendment	176008020346	1			CB-Request for	(Dean F. Unger, AIA, INC.	
6		Contract	176007020356		2/28/03	Public Works	Competitive Bid	(LOS ANGELES AIR CONDITIONING, INC.	
7		Amendment	176007020356	1			Competitive Bid	(LOS ANGELES AIR CONDITIONING, INC.	
8		Contract	176008020357		2/28/03	A & E (Archite	CB-Request for	(ENVIRONMENTAL SCIENCE & ENGINEERING	
9		Amendment	176008020357	1			CB-Request for	(ENVIRONMENTAL SCIENCE & ENGINEERING	
10		Amendment	176008020357	2			CB-Request for	(ENVIRONMENTAL SCIENCE & ENGINEERING	
11		Amendment	176008020357	3			CB-Request for	(ENVIRONMENTAL SCIENCE & ENGINEERING	
12		Amendment	176008020357	4			CB-Request for	(ENVIRONMENTAL SCIENCE & ENGINEERING	
13		Amendment	176008020357	5			CB-Request for	(ENVIRONMENTAL SCIENCE & ENGINEERING	
14		Contract	176008030359		3/3/03	A & E (Archite	CB-Request for	(INTERNATIONAL PARKING DESIGN	
15		Amendment	176008030359	1			CB-Request for	(INTERNATIONAL PARKING DESIGN	
16		Amendment	176008030359	2			CB-Request for	(INTERNATIONAL PARKING DESIGN	
17		Amendment	176008030359	3			CB-Request for	(INTERNATIONAL PARKING DESIGN	
18		Amendment	176008030359	4			CB-Request for	(INTERNATIONAL PARKING DESIGN	

Text File report format

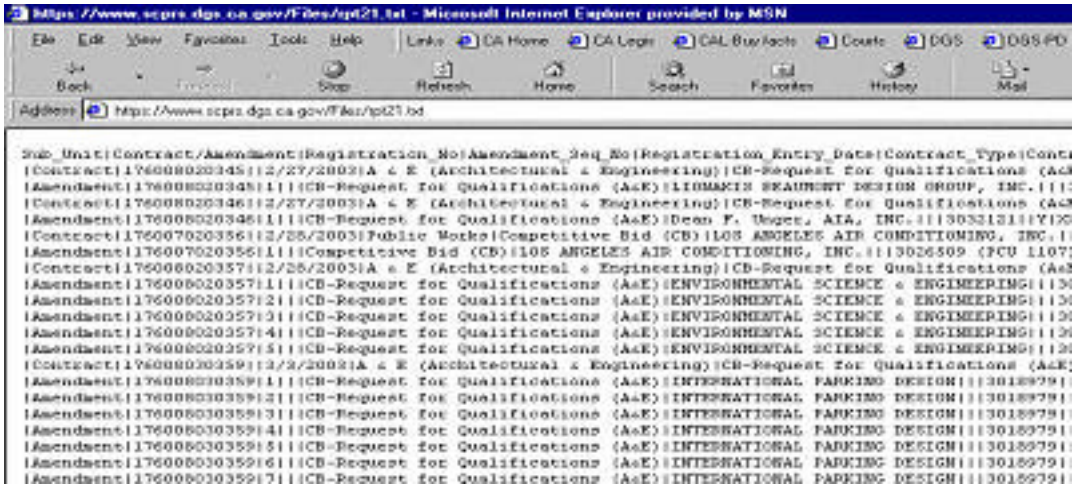
- List Option report type



- Summary report type



- Detail report type

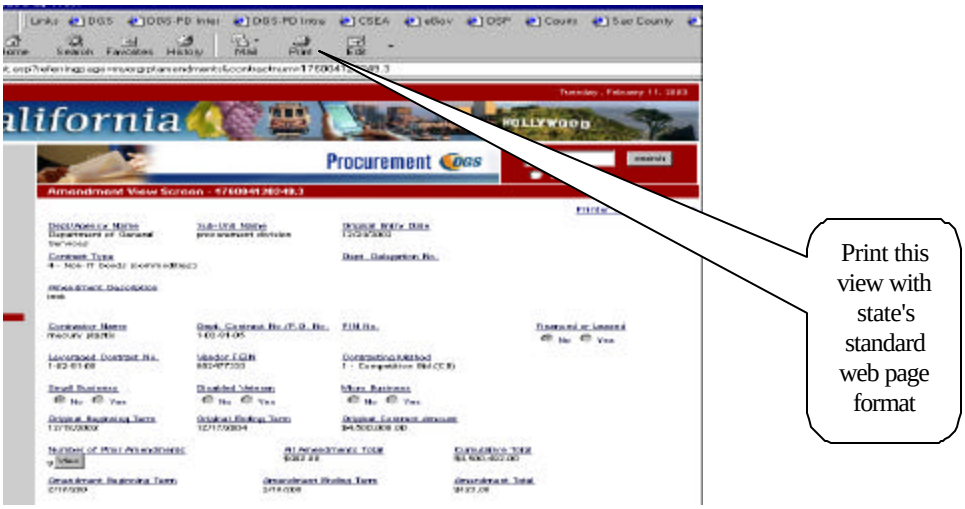


Go to Section 5a to continue the **Reports** part of the User Manual

Section 5a
Query/Reports (continued)
SCPRS
July 1 2003

Printing

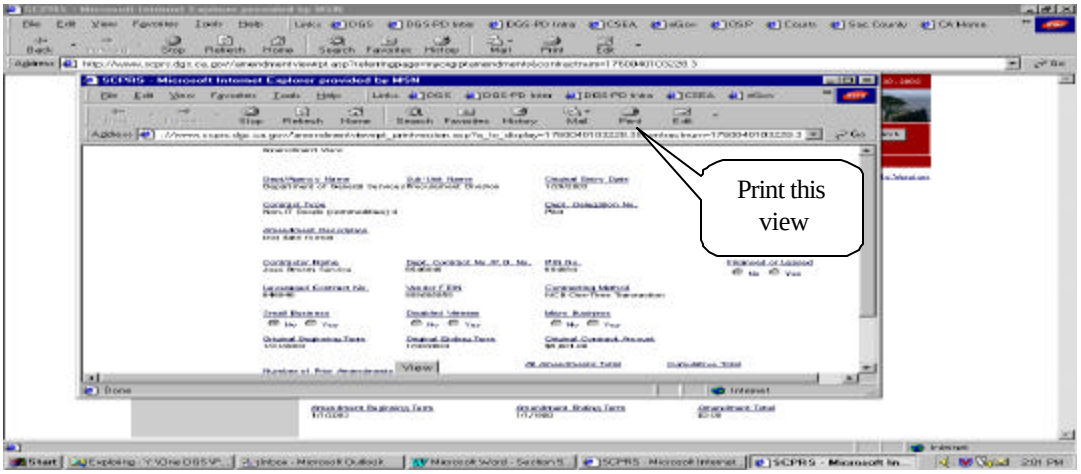
Any screen with the colors and borders can be printed as seen by using the Browser gray ***Print*** button as shown below. The File Menu on the top bar of the Browser window also contains a print selection.



Printable Version

Many screens include a link to permit printing of data only and without the colors and additional text that is part of the state's web page standard.

If you click on the blue link for Printable Version as show above, a new window opens (shown below).



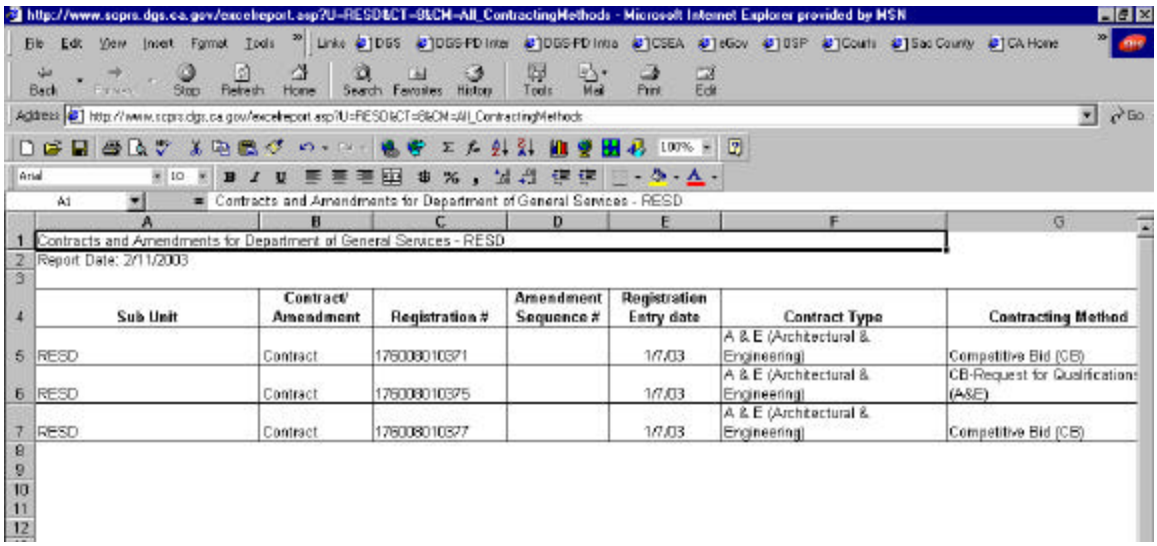
To print the data in this new window, click on the gray ***Print*** browser button that is on the top inside of the new window. (You can also use the print selection on the File Menu on the *inside* window.)

Saving Data

Excel Spreadsheet Format

With the Excel Spreadsheet report format selected, click on the gray button ***Get Report*** at the bottom of the screen.

The report returns to fill the screen and looks like that shown below.



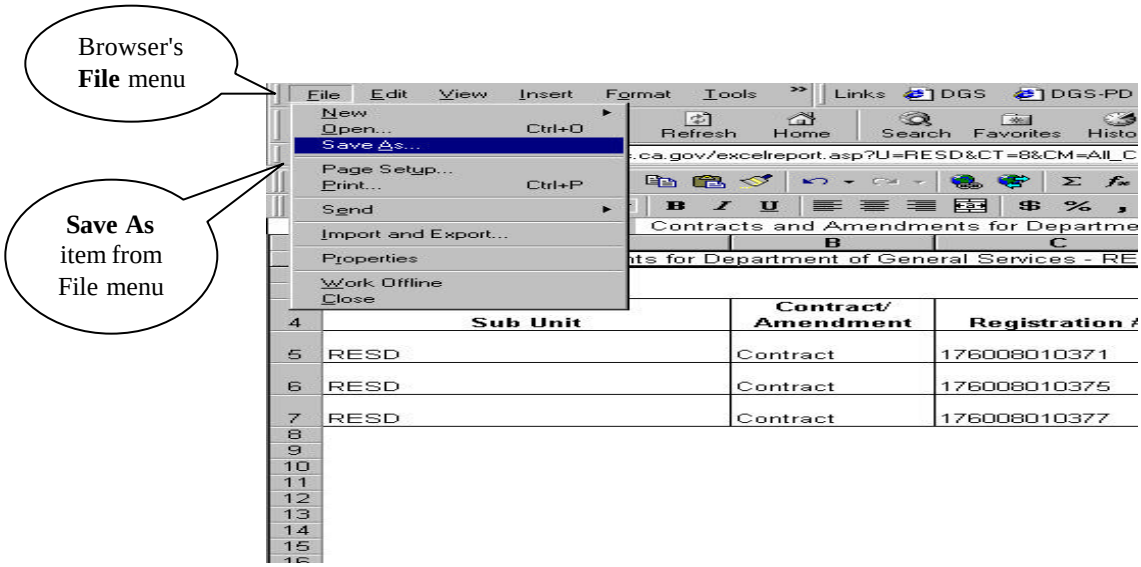
Sub Unit	Contract/ Amendment	Registration #	Amendment Sequence #	Registration Entry date	Contract Type	Contracting Method
RESD	Contract	176008010371		1/7/03	A & E (Architectural & Engineering)	Competitive Bid (CB)
RESD	Contract	176008010375		1/7/03	A & E (Architectural & Engineering)	CB-Request for Qualifications (A&E)
RESD	Contract	176008010377		1/7/03	A & E (Architectural & Engineering)	Competitive Bid (CB)

This data can be saved in an Excel worksheet format onto your local computer or server. Notice that the top most area of the screen contains the Browser buttons and menus. Although the spreadsheet has the Excel buttons available to you based on your

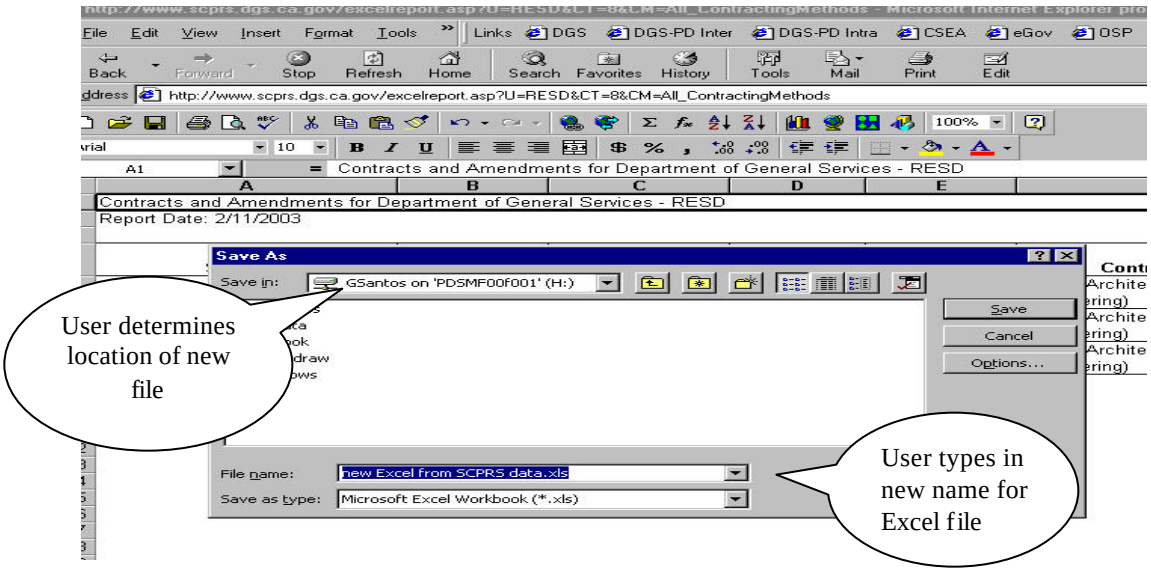
usual Excel settings (see below the Browser menus), **you need to use the Browser's buttons to save the data**.

Follow the screens below to save data in a new Excel file:

- ***Get Report*** - data appears in Excel format as seen above.
- Click on Browser's drop down menu called **File**.



- Click on the **Save As** item in the File menu.
  1. Be sure to identify the location where you want to file save to by using the 'Save in:' drop down box.
  2. From the 'Save as type:' drop down box, select the Excel version you want to save the data with.
  3. In the 'File name:' drop down box, type in a name for this new Excel file



4. Click on the gray ***Save*** button in the **Save As** window. The data can be sorted, deleted or formatted in any manner with your own Excel software.

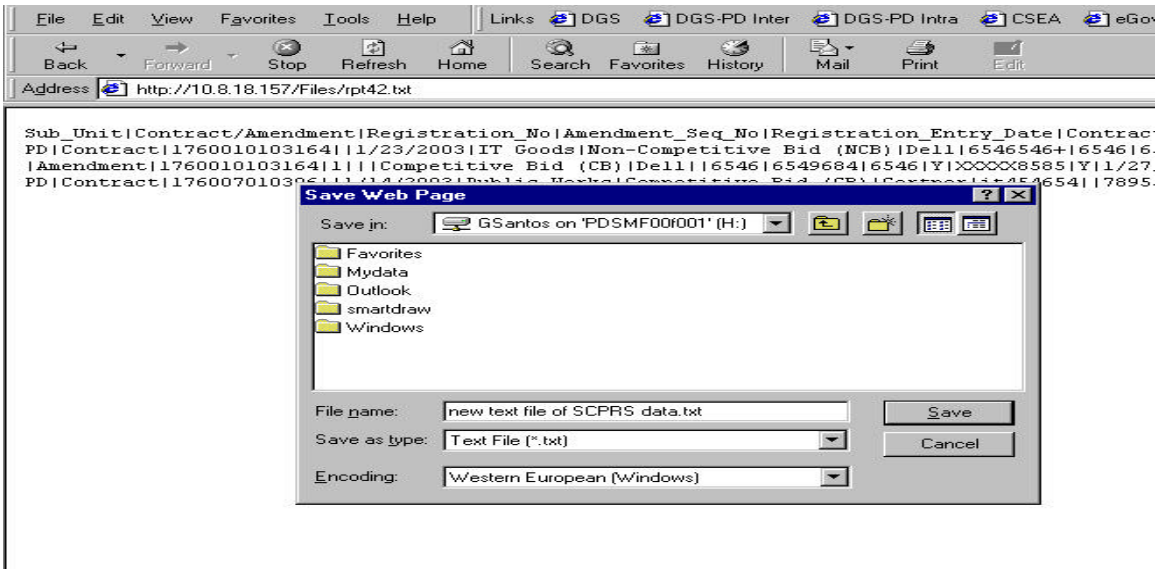
   Note: After the file is saved, and before you can use Excel to open this new file, you must use the gray Back button on your browser while within the SCPRS program to close the SCPRS view of the Excel data. If you attempt to open this new file in Excel before it is closed in SCPRS, your computer will see two files with the same name: the one in SCPRS and the one you are trying to open in Excel. If you use the small 'X' in the top right corner to close the SCPRS Excel Spreadsheet view, you will be closing your internet browser and be logged out of SCPRS.

Text Report Format

The same basic steps as outlined above for excel spreadsheets can be used to save data in a text file.

Click on the gray button ***Get Report***. The report returns to fill the screen and looks like those shown earlier in the Report Format section of this users manual.

When you click on the **Save As** item in the File menu, a new box will appear on the screen as seen below. The title of this box seen in the top dark blue bar is "Save Web Page".



The remaining steps are the same as saving any file. Select the location to save the file, type in a name for the file, select a format method (or in this case, a "Encoding" format and click on the gray ***Save*** button.

Please contact your departments computer support for additional assistance if needed.