



SB 20 Update

**84th Regular Legislative Session
CAPPS User Group**

February 23, 2016

Overview

- *Develop Standards for Entry into CAPPS*
- *Align CAPPS to LBB and DIR Requirements and Systems*
- *Establish Framework for CAPPS Agency User Training*
- *Design Automated Solution for Meeting SB20 Requirements*

Definitions

Contract

A written agreement where an entity provides goods or services and the agency pays for such goods and services in accordance with the established price, terms and conditions.

<Source, State of Texas Contract Management Guide, Version 1.14, September 1, 2015>



Definitions

Current Contract Value

The Current Contract Value includes the value of the contract, any amendments, and any exercised extensions or renewals; i.e., the total contract amount currently obligated to date. This information specifies how much is currently obligated under the contract.

<Source, LBB Contracts Database Data Dictionary>

Maximum Contract Value

The Maximum Contract Value field should include the value of the contract, amendments, and *all potential* extensions or renewals, i.e. the total amount both currently and potentially obligated. The maximum contract value should be used for determining whether a contract meets a reporting threshold, and can be distinguished from Current Contract Value, which includes the value of the contract, any amendments, and any exercised extensions or renewals, i.e. the total amount currently obligated.

<Source, LBB Contracts Database Data Dictionary>

Definitions

Open Item Released Amount

An amount in the CAPPS Procurement Contract header page showing the amount of Purchase Orders created against a contract record. This is the amount that has been encumbered against the contract.

Total Released Amount

A field within CAPPS that provides a sum of all releases, whether they were made at the line level for a contract (Line Item Released Amount) or at the header level for a contract (Open Item Released Amount). This amount provides the full amount encumbered against a contract record , regardless of appropriation.

Definitions

Purchase Order Record in CAPPS

- Directly impacts the budget
- May be electronically signed by the authorized Purchaser
- Creates a Purchase Order for sending to an awarded vendor
- Used to encumber funds
- May identify specific release against a Procurement Contract for a valid appropriation year
- If the procurement meets the LBB reportable requirement, a Procurement Contract record must be entered in CAPPS with the PO line associated to the contract record.

Definitions

Procurement Contract Record in CAPPS

- Has no direct budget impact
- Captures specific begin and end dates that may span multiple fiscal years
- Identifies full amount of contract for entire term of contract, including all possible renewals and extensions, regardless of appropriation availability.
- May or may not relate to an LBB reportable category.

Electronic Attachments

- Requisition header and line levels;
- Receipt header and line levels;
- RFQ header and line level;
- Procurement Contract header and line;
- Purchase Order header and line.

Electronic Attachments

- **Attachments can include:**
 - **Best Value criteria;**
 - **Bid tabulations and award criteria;**
 - **Approvals from external approving entities;**
 - **Planning documents including timelines and Risk Analysis;**
 - **Statement of Work (SOW);**
 - **Solicitation documents;**
 - **Corrective Action Plans;**
 - **Contract Monitoring components**

Electronic Attachments

- **Points to Consider**

- **Cannot be used as reporting or field look-up criteria;**
- **Provides ease in downstream processing;**
- **Ease in audit compliance.**

Purpose of Procurement

Maintain Purchase Order

Purchase Order

Business Unit 03200 TxSmartBuy Pur
PO ID 0000001377
Copy From Sum

▼ Header ?

*PO Date 10/28/2013 Supplier Search
*Supplier CRESTLINE-001 Supplier Details
*Supplier ID 1010515202 CRESTLINE SP
*Buyer TXTESTBUYR1 Buyer1 User

PO Reference Contract Requirements for SB20

Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Com
Requisitions Document Status
▼ Actions

Contract Entry

Contract

Contract Ver
Version:

SetID: 03200
Contract ID: 000000000000000000000000000012
*Status: Approved

Administrator/Buyer TXTESTBUYR1 Buyer1 User

▼ Header ?

Process Option Purchase Order
Supplier CRESTLINE-001
Supplier ID 1010515202 CRESTLINE SPECIALTIES INC
Begin Date 10/28/2013
Expire Date 10/31/2018 Renewal of
Renewal Date 10/28/2016 Renewals Expire
Currency USD CRRNT Current Contract Value USD
Primary Contact
Supplier Contract Ref
Description Contract Requirements for SB20
Master Contract ID

- **Purchase Order**
 - PO Reference field
- **Procurement Contract**
 - Description field

Conflict of Interest

Sec. 2261.252. DISCLOSURE OF POTENTIAL CONFLICTS OF INTEREST; CERTAIN CONTRACTS PROHIBITED. (a) Each state agency employee or official who is involved in procurement or in contract management for a state agency shall disclose to the agency any potential conflict of interest specified by state law or agency policy that is known by the employee or official with respect to any contract with a private vendor or bid for the purchase of goods or services from a private vendor by the agency.

(b) A state agency may not enter into a contract for the purchase of goods or services with a private vendor with whom any of the following agency employees or officials have a financial interest.....

Conflict of Interest



- Summary
- Identifying Information
- Address
- Contacts**
- Location
- Custom
- TINS Information
- CMBL Information
- Hub Information

SetID 03200

Supplier ID 1010515202

Short Supplier Name CRESTLINE-001

Supplier CRESTLINE SPECIALTIES INC

Supplier Contact

Find | View All First 2 of 2 Last

Contact ID 2
Description Conflict of Interest



Details

Find | View All First 1 of 1 Last

Effective Date 07/03/2015
Effective Status Active
Type Conflict of Interest
Name Jane Doe
Title 03200 Buyer
Address

Internet http:// View Internet Address
Email ID

Phone Information

Personalize | Find | First 1 of 1 Last

*Type	Prefix	Telephone	Extension
Business Phone			

Conflict of Interest

- Public Query in CAPPS available

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
---------	-------	-------------	---------	--------	----------	--------	----------	-----

SetID = 99900

[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#)

First ◀ 1-3 of 3 ▶ Last

	SetID	Supplier ID	Supplier Name	Supplier Status	Contact Status Eff Date	Contact Status	Contact Name	Contact Title
1	99900	1234567890	ABC Corporation	Approved	05/12/2015	Active	John Doe	Buyer
2	99900	1987654321	Corporate Supplier Company of America	Approved	06/15/2015	Inactive	Jane Doe	Purchasing Manager
3	99900	1123456789	XYZ Corporation	Approved	05/12/2015	Active	Connie Conflict	Contract Manager

Procurement Contracts

- Captures Contract Types

Contract | TEXAS Data

SetID: 99900 Contract ID: 000000022 Contract Version 1

Contract Category:	<ul style="list-style-type: none">CCGConsultantEMERGGrantGrnt_SubInteragencInterlocalMANAGEOPMKTOther-2227Prof ServsSubrcptTERMTRAVELTXMAS	Other Contract Category: <input type="text"/>
LBB Contract Reporting		<input type="checkbox"/> Allow Releases to Exceed Max
Contract Contingency:		<input type="checkbox"/> USAS 30 Profile/Contract Wrkfc
HUB Percentage:		<input type="checkbox"/> Outsourced Contract
Contract Retainage:	<input type="text"/>	
Contract Auditor:	<input type="text"/>	

Contract Alternatives and

Contract Alternatives	<input type="text"/>
Contract Explanation	<input type="text"/>

Find | View All First 1 of 1 Last + -

Procurement Contracts

- Captures LBB Contract Types

The screenshot shows a software interface for managing procurement contracts. At the top, there are tabs for 'Contract' and 'TEXAS Data'. Below the tabs, contract details are displayed: 'SetID: 99900', 'Contract ID: 000000022', and 'Contract Version 1'. A sidebar on the left contains several menu items, with 'LBB Contract Reporting' highlighted by a red box. A modal window titled 'LBB Contract Reporting' is open in the foreground, displaying a list of reporting codes with checkboxes. The 'None' option is selected. At the bottom of the modal are three buttons: 'OK', 'Cancel', and 'Refresh'.

Contract Category: [P]

LBB Contract Reporting [N]

Contract Contingency: []

HUB Percentage: []

Contract Retainage: []

Contract Auditor: [00]

Contract Alternatives and Ex []

Contract Alternatives []

Contract Explanation []

SetID: 99900 Contract ID: 000000022 Contract Version 1

LBB Contract Reporting

LBB Reporting Code(s)

- None
- Major Info Sys/Gen > \$100K
- Construction > \$14K
- Professional Services > \$14K
- Consulting Services > \$14K
- Purchases > \$50K
- Purchases > \$10 Million
- Non-Competitive Pur > \$1M
- Emergency > \$1M

OK Cancel Refresh

Procurement Contracts

- Contract Version Availability

The screenshot shows the Oracle Procurement Contracts interface. At the top, there is a breadcrumb trail: Favorites > Main Menu > Procurement Contracts > Add/Update Contracts. The Oracle logo is visible in the top left. Below the breadcrumb, there are tabs for 'Contract' and 'TEXAS Data'. The main section is titled 'Contract Entry' and 'Contract'. On the left, there are fields for 'SetID: 03200', 'Contract ID: 00000000000000000000000000000006', and '*Status: Approved'. On the right, there is a 'Contract Version' section with a red border around it. It contains: 'Version: 1', 'Status: Current', 'Approved Date: 04/08/2013', and a 'New Version' button. Below this is an 'Add a Document' button. At the bottom, there is a 'Header' section with a dropdown arrow and a help icon. It contains a table of contract details: Process Option (General Contract), Supplier (TEXAS STAT-002), Supplier ID (3306306306), Begin Date (04/08/2013), and Expire Date (04/29/2013). The supplier name 'TEXAS STATE LIBRARY' is underlined. To the right of the table are links for 'Contract Activities', 'Add Comments', 'Activity Log', 'Document Status', 'Thresholds & Notifications', and 'ISAS Contract Status: [input]'. At the bottom right, there is a '*Purchasing Method: DG PCC 0' with search icons.

Change Template

Template STANDARD

Type Contracts

*Description

Short Description

Copy Template 

Record

Find | View All First 10 of 13 Last

*Record 

Description Contract Header



Record Fields

Personalize | Find | View 10 |   First 1-66 of 66 Last

Track Change	Field Name	Description	*Label Type
<input type="checkbox"/>	ADJ_BEFORE	Adjust Supplier Pricing First	Rec Long 
<input type="checkbox"/>	ALLOW_MC_PO	Allow Multicurrency PO	Rec Long 
<input type="checkbox"/>	ALLOW_OPEN_ITEM	Allow Open Item Reference	Rec Long 
<input checked="" type="checkbox"/>	AMT_CNTRCT_MAX	Maximum Amount	Rec Long 
<input type="checkbox"/>	BUSINESS_UNIT_AP	AP Business Unit	Rec Long 
<input type="checkbox"/>	BUYER_ID	Buyer	Rec Long 
<input type="checkbox"/>	CNTCT_SEQ_NUM	Contact Sequence Number	Rec Long 
<input type="checkbox"/>	CNTRCT_AUTO_DFLT	Automatic Contract Default	Rec Long 
<input checked="" type="checkbox"/>	CNTRCT_BEGIN_DT	Contract Beginning Date	Rec Long 
<input type="checkbox"/>	CNTRCT_CF_LOCK	Lock Chartfields	Rec Long 
<input type="checkbox"/>	CNTRCT_CORP_FLG	Corporate Contract	Rec Long 
<input type="checkbox"/>	CNTRCT_DISP_MTHD	Contract Dispatch Method	Rec Long 
<input checked="" type="checkbox"/>	CNTRCT_EXPIRE_DT	Expire Date	Rec Long 
<input type="checkbox"/>	CNTRCT_EXPIRY_FLG	Send Date/Amount Notification	Rec Long 
<input type="checkbox"/>	CNTRCT_NOTIFY	Notify Days Before Expires	Rec Long 
<input checked="" type="checkbox"/>	CNTRCT_STATUS	Contract Status	Rec Long 
<input type="checkbox"/>	CURRENCY_CD	Currency Code	Rec Long 
<input checked="" type="checkbox"/>	DESCR	Description	Rec Long 

Procurement Contracts

Contract Entry

Contract

SetID: 03200 Contract Version
 Contract ID: 000000000000000000000000000012 Version: 2 Status: Current
 *Status: Approved Approved Date: 07/12/2015

Administrator/Buyer TXTESTBUYR1 Buyer1 User

Add a Document

Header ?

Process Option Purchase Order
 Supplier CRESTLINE-001
 Supplier ID 1010515202 CRESTLINE SPECIALTIES INC

Contract Activities
 Primary Contact Info
 Contract Header Agreement
 Contract Releases

Add Comments

Activity Log
 Document Status
 Thresholds & Notifications
 ISAS Contract Status: R02 ?

Begin Date 10/28/2013
Expire Date 10/31/2018 Renewal 2 of 4
 Renewal Date 10/28/2016 Renewals Expire 2018

*Purchasing Method: DG ? PCC F ?

Currency USD CRRNT Current Contract Value 500.00 USD

Amount Summary ?

Maximum Amount	7,000.00 USD
Line Item Released Amount	0.00
Category Released Amount	0.00
Open Item Released Amount	500.00
Total Released Amount	500.00
Remaining Amount	6,500.00
Remaining Percent	92.86

Supplier Contract Ref
 Description Contract Requirements for SB20

Tax Exempt Tax Exempt ID

Parent Contract Record HUB Bid Details

Procurement Contracts

Contract Entry

Contract

SetID: 03200 Contract Version
 Contract ID: 00000000000000000000000000000012 Version: 2 Status: Current
 *Status: Approved Approved Date: 07/12/2015

Administrator/Buyer TXTESTBUYR1 Buyer1 User Add a Document

Header ?

Process Option Purchase Order
 Supplier CRESTLINE-001
 Supplier ID 1010515202 CRESTLINE SPECIALTIES INC

Contract Activities Add Comments Activity Log
 Primary Contact Info Document Status
 Contract Header Agreement Thresholds & Notifications
 Contract Releases **ISAS Contract Status: R02**

Begin Date 10/28/2013
 Expire Date 10/31/2018
Renewal Date 10/28/2016 Renewal 2 of 4
Renewals Expire 2018

*Purchasing Method: DG PCC F

Currency USD CRRNT Current Contract Value 500.00 USD

Amount Summary ?

Maximum Amount	7,000.00 USD
Line Item Released Amount	0.00
Category Released Amount	0.00
Open Item Released Amount	500.00
Total Released Amount	500.00
<hr/>	
Remaining Amount	6,500.00
Remaining Percent	92.86

Supplier Contract Ref
 Description Contract Requirements for SB20

Tax Exempt Tax Exempt ID

Parent Contract Record HUB Bid Details

Procurement Contracts

- Values available for selection

Select one of the following values: Help

A	Amendments
C	Cancellations
E	Extension
I	Initial Execution
M	Completions
P	Expirations
R	Renewals
R01	Renewal 1
R02	Renewal 2
R03	Renewal 3
R04	Renewal 4
R05	Renewal 5
R06	Renewal 6
R07	Renewal 7
R08	Renewal 8
R09	Renewal 9
R10	Renewal 10
S	Suspend

Cancel

Activity Log
Document Status
Thresholds & Notifications
ISAS Contract Status: R02

unt	7,000.00	USD
unt	0.00	
unt	0.00	
unt	500.00	
unt	500.00	
unt	6,500.00	
ent	92.86	

Procurement Contracts

- *Create new field on Procurement Contract Header to identify the PCC code for the procurement; and*

Contract
TEXAS Data

Contract Entry

Contract

SetID: 99900

Contract ID: 000000022

*Status: Approved

Administrator/Buyer: 90010009999 Buyer, Betty

Contract Version

Version: 1 Status: Current

New Version

Approval Due Date: 08/15/2014

Add a Document

Header ?

Process Option	Purchase Order	Contract Activities	Add Comments	Activity Log														
Supplier	ABC CONSU-001	Primary Contact Info		Document Status														
Supplier ID	1234567890	Contract Header Agreement		Thresholds & Notifications														
	1234567890	Contract Release		ISAS Contract Status: I														
Begin Date	09/01/2014	*Purchasing Method: DG PCC Q																
Expire Date	08/31/2016	Renewal 1 of 5																
Renewal Date	08/31/2016	Renewals Expire 2020																
Currency	USD CRRNT	Current Contract Value 40,000.00 USD	<p style="text-align: center; margin: 0;">Amount Summary ?</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">Maximum Amount</td> <td style="text-align: right;">200,000.00 USD</td> </tr> <tr> <td>Line Item Released Amount</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Category Released Amount</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Open Item Released Amount</td> <td style="text-align: right;">40,000.00</td> </tr> <tr> <td>Total Released Amount</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Remaining Amount</td> <td style="text-align: right;">160,000.00</td> </tr> <tr> <td>Remaining Percent</td> <td style="text-align: right;">80.00</td> </tr> </table>		Maximum Amount	200,000.00 USD	Line Item Released Amount	0.00	Category Released Amount	0.00	Open Item Released Amount	40,000.00	Total Released Amount	0.00	Remaining Amount	160,000.00	Remaining Percent	80.00
Maximum Amount	200,000.00 USD																	
Line Item Released Amount	0.00																	
Category Released Amount	0.00																	
Open Item Released Amount	40,000.00																	
Total Released Amount	0.00																	
Remaining Amount	160,000.00																	
Remaining Percent	80.00																	
Primary Contact																		
Supplier Contract Ref																		
Description	Consulting Services FY15-20																	
Master Contract ID																		
<input type="checkbox"/> Tax Exempt	Tax Exempt ID																	

Parent Contract Record HUB Bid Details
80.00

CAPPS Enhancements

- Special/Priority Purchase Types

Special/Priority Purchase Types Help

Purchase Type

Sole Source Proprietary Emergency After the fact Confirming Order Other - See Comments

Comments Best Value Flag

This purchase requires a proprietary component based on manufacturer guidelines. Only the specific part specified is able to be procured for the equipment upgrade.

BEST VALUE CRITERIA:
- Price 25%
- Earliest Delivery Date 75%

LBB Notice CPA - TPASS PO#

Renewal Option

Contract Entry

Contract

SetID: 99900
 Contract ID: 000000022
 *Status: Approved

Contract Version
 Version: 1 Status: Current
 New Version Approval Due Date:

Administrator/Buyer

Add a Document

Header ?

Process Option Purchase Order

Contract Activities

Add Comments

Contract Comments

Contract Entry

Header Comments

SetID 99900 Contract ID 000000022 Version 1

*Sort Method Comment Time Stamp *Sort Sequence Ascending

Comments Find | View All First of 1 Last

Use Standard Comments Comment Status Active Inacti

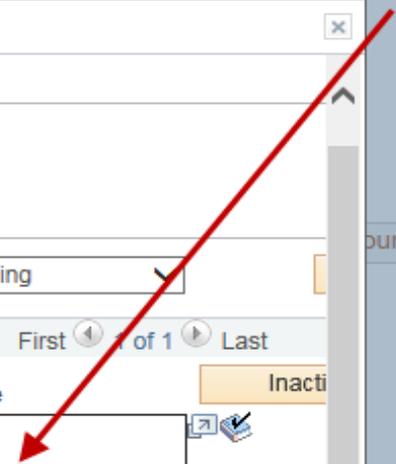
Best Value Criteria used in this procurement.
 Detailed weighted tabulations included in hard copy procurement file.
 Multiple criterion used.

Send to Supplier Show at Receipt Show at Voucher Copy to Purchase Order DLT Comment

Associated Document

Attachment	Attach	View	Delete	Email
From -> CNT 99900-000000022				

OK Cancel Refresh



ount Summary ?

Maximum

Line Item Released

Category Released

Open Item Released

Total Released

Remaining

Remaining

Rate Date 02/15/2016

Receipt Date Indicator

Procurement Contracts

- **Activities**

Contract Activities

Contract Entry

Contract Activities

SetID 03200 Contract ID 00000000000000000000000012 Version 1

Activities Personalize | Find | View All | First 1 of 1 Last

Version	*Due Date	Done	Activity Type	*Comments
1	6/15/2015	<input type="checkbox"/>		

OK Cancel Refresh

- Add Items
- Changd UOM
- Extension
- Item Chng
- New Cntrct
- Other Chgs
- Price Chng
- Renewal
- Rmvd Item
- VndrID Chg
- VndrNme Ch

Contract Activities

Primary Contact Info

Contract Header Agreement

Contract Releases

*Purchasing Method: AT

Process Option: General Contract

*Supplier: CRESTLINE-001

*Supplier ID: 1010515202

*Begin Date: 10/28/2013

Expire Date: 10/31/2013

Renewal: of

Renewals Expire:

Supplier: CRESTLINE SPECIALTIES INC

Activity Log

Document Status

Thresholds & Notifications

ISAS Contract Status:

Amount Summary

Purchase Orders

Maintain Purchase Order

Purchase Order

Business Unit 03200 TxSmartBuy Purchase Order

PO ID 0000001387

PO Status Dispatched  

Budget Status Valid  

Change Order 1

Copy From Summary Document Type Hold From Further Processing

Header 

*PO Date 07/01/2015 Supplier Search Doc Tol Status Valid

*Supplier BM GLASS S-001 Supplier Details Backorder Status Not Backordered

*Supplier ID 1740264229 BM GLASS SERVICES Receipt Status Received [Create BackOrder](#)

*Buyer EXTSTBUYR1 Buyer1 User *Dispatch Method Print

PO Reference FY15 Services

Merchandise	10.00	
Freight/Tax/Misc.	0.00	
Total Amount	10.00	USD
Encumbrance Balance	0.00	USD

Amount Summary 

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

Requisitions Document Status

Actions

HUB Bid Details

HUB Subcontracting

Special/Priority Purchase Types: Other State Use Exception

Add Items From 

Catalog Item Search

Purchasing Kit

Select Lines To Display 

Search for Lines Line  To 

Purchase Orders

- **Activities**

The screenshot shows the Oracle Purchasing 'Maintain Purchase Order' interface. A 'Purchase Order Activities' dialog box is open, displaying a table with one activity row. A red arrow points from the 'PO Activities' link in the left sidebar to the dialog box.

Business Unit: 03200
PO ID: TEST-DLT
Supplier: TEXAS FACI-001

Done	*Due Date	SeqNum	*Comments
1			

Buttons: OK, Cancel, Refresh

Deliverables

- **Deliverables**
 - **Verified by receipt**
 - **Verified by valid inspection of receipt record**
 - **PO or Contract activities**
 - **Attachments to the procurement record**
 - **Activities**

PO Workflow

- **Function is similar to requisition workflow**
- **Multiple approval levels can be established**

PO Workflow

Setup Process Definitions

Clone Approval Process | Approval Process Viewer | Preview Approval

Process ID PurchaseOrder
 Definition ID 03200
 Effective Date 03/09/2011
 Description

Definition Options

Definition Criteria | Alert Criteria | Definition Notifications | Tim

*Admin Role TX_WF_PURCHASEORDER
 *Status Active
 Priority 1

Stages

*Stage Number 10 Description Approval Upto PO Director

Paths

Description Purchase Order Approval - 1 *Source Stat

Steps

Description	Personalize F
1 Project Lead Approval	TX Team Lead
2 Purchase Director Approval	TX PO Director
3 COS Approval	TX COS

Criteria Definition

*Criteria Type User Entered

All Criteria Needed to Satisfy

User Entered Criteria Find | View All First 1 of 1 Last

Description Team Lead for Review and Approval

Field Criteria

Record Field Name

*Criteria Operator	Value	Value	List Values
1			

Monetary Criteria

Amount Record TX_PO_APPR_VW2 Amount Field PO_TOTAL

Currency Field CURRENCY_CD

Operator Greater Than or Equal To

Amount 5,000.000

Currency Code USD

Rate Type

OK Cancel Apply

PO Workflow

Setup Process Definitions

Clone Approval Process | Approval Process Viewer | Preview Approval

Process ID: PurchaseOrder
 Definition ID: 03200
 Effective Date: 03/09/2011
 Description: []

Definition Options

Definition Criteria | Alert Criteria | Definition Notifications | Tim

*Admin Role: TX_WF_PURCHASEORDER
 *Status: Active
 Priority: 1

Stages

*Stage Number: 10 | Description: Approval Upto PO Director

Paths

Description: Purchase Order Approval - 1 | *Source: Stat

Steps

Description	Approver User L
1 Project Lead Approval	TX Team Lead
2 Purchase Director Approval	TX PO Director

Criteria Definition

*Criteria Type: User Entered
 All Criteria Needed to Satisfy

User Entered Criteria Find | View All First 1 of 1 Last

Description: Purchasing Director for Reiew and Approval

Field Criteria

Record: [] Field Name: []

*Criteria Operator	Value	Value	List Values
1	[]	[]	[]

Monetary Criteria

Amount Record: TX_PO_APPR_VW2 | Amount Field: PO_TOTAL
 Currency Field: CURRENCY_CD
 Operator: Greater Than or Equal To
 Amount: 50,000.000
 Currency Code: USD
 Rate Type: []

OK | Cancel | Apply

Maintain Purchase Order

Purchase Order

Business Unit 03200 TxSmartBuy Purchase Order
 PO ID 0000009174

PO Status Dispatched
 Budget Status Valid

Copy From Summary Document Type Hold From Further Processing

Header ?

*PO Date 07/07/2015 Supplier Search
 *Supplier PRESTO LE-001 Supplier Details
 *Supplier ID 1591865606 PRESTO LETTER OPENER CO
 *Buyer 00090009999 Jane Doe

Doc Tol Status Valid
 Backorder Status Not Backordered
 Receipt Status Not Recvd Create BackOrder
 *Dispatch Method Print Dispatch

PO Reference PRESTO LETTER OPENERS
 Header Details Activity Summary
 PO Defaults Edit Comments
 PO Activities Add ShipTo Comments
 Requisitions Document Status
 Actions HUB Bid Details
 HUB Subcontracting
 Special/Priority Purchase Types: N/A

Amount Summary ?
 Merchandise 246.00
 Freight/Tax/Misc. 0.00 Calculate
 Total Amount 246.00 USD
 Encumbrance Balance 246.00 USD
 State Use Exception

Add Items From ?

Catalog Item Search
 Purchasing Kit

Select Lines To Display ?

Search for Lines Line To Retrieve

Lines ? Personalize | Find | View All | First 1 of 1 Last

Details	Class/Item	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving	State Mandate Fields	Texas Smart Buy
Line	Item	Description		PO Qty	*UOM	Price	Merchandise Amount	Status		
1		Presto Letter Style Opener 2-7/8x1/8x1/4 by Rogers		150.0000	EA	1.64000	246.00	Approved		

View Printable Version
[View Approvals](#)

Request For Quote

- **Supplier Quote Group**
- **RFQ Development**
- **Submission to Bidders**
- **Collect and Enter Responses**
- **Analyze and Award**

CAPPS Reports To Be Developed Include

- *LBB Interface;*
- *LBB Interface Report;*
- *Conflict of Interest Report; and*
- *Best Value Report*

Next Steps

- *Complete changes in CAPPS to support legislative requirements;*
- *Continue providing updates to SB20 progress at future User Group sessions;*
- *Update existing CAPPS training materials; and*
- *Develop Rules*

LBB Interface Design

- *Develop daily interface containing new LBB reportable contract data;*
- *Identify amended contract records for LBB updates;*
- *Develop daily report for agencies to identify records sent to LBB;*
- *Deliver inclusive expenditure report to LBB for expenditures made against all LBB reportable contracts*

Agency Considerations and Action Items

- **Contract Versioning and Track Changes**
 - *Due COB March 4, 2016*
- **Review Contract Types**
 - *Due COB March 31, 2016*
- **Provide input on Statewide Reporting needs.**
 - *Ongoing*

Thank you

Sharon.Kemp@cpa.texas.gov
512-475-5645