



## Procedures

# SDAS Contract Maintenance For OpenSD

Compliance with SDCL 5-18-xx

Page	Contents
=====	=====
2	Background
3	Categories of Contracts
4	Accessing the OpenSD Contracts Module
5	Adding/Editing Contract Information
7	Locating an Existing Contract
8	Placing the Contract Image on the Web
9	Deleting Contracts and Images
10	Frequently Asked Questions

## SDAS Contract Maintenance for OpenSD Procedures

### Background

Senate Bill 82, passed during the 2010 legislative session, codified as §5-18-xx, reads:

Section 1. That chapter 1-27 be amended by adding thereto a NEW SECTION to read as follows:  
The state shall display on the searchable internet **website** created pursuant to § 1-27-45 copies of each written contract for **supplies**, **services**, or **professional services** of ten thousand dollars or more, each written contract filed with the state auditor pursuant to § 1-24A-1, and each written contract filed with the attorney general pursuant to § 1-11-15. Each contract shall be displayed electronically not less than sixty days after commencement of the contract term and for not less than one year following the end of the contract term.

Definitions used in this bill are:

- the **website** created by §1-27-45 is [Open.SD.gov](http://Open.SD.gov) (OpenSD)
- **supplies** are any property, including equipment, materials and printing
- **services** involve the furnishing of labor, time or effort by a contractor not involving the delivery of a specific end product
- **professional services** are services arising out of a vocation, calling, occupation or employment involving specialized knowledge, labor or skill that is predominately mental or intellectual rather than physical or manual

What this means to state government is that beginning July 1, 2010, any contract for \$10,000 or more, any consultant contract filed with the state auditor, and any legal contract filed with the attorney general needs to be displayed on OpenSD within 60 days of the contract start date and for one year after the end of the contract.

BFM recognizes that most agencies already have their own internal procedures for managing contracts, and that SB82 may cause some additional work and adjustment of procedures.

Functionality has been added to the SDAS PC Interface to provide state agencies the ability to link their contracts to OpenSD with the intent of trying to minimize duplication of effort, to link with the existing Register of Proposals (§5-18-60) procedures, and to avoid having to re-enter information already recorded in the state's central accounting system.

## **SDAS Contract Maintenance for OpenSD Procedures**

### **Categories of Contracts**

Contracts that are covered by the statute will tend to fall into 3 categories:

- **Contracts awarded under an RFP and listed on the Register of Proposals on OpenSD**

If a contract for professional services was awarded under an RFP as required by §5-18-57 and the agency has followed the Register of Proposals procedures (for executive branch agencies), nothing further needs to be done to comply with SB82.

- **Contracts entered on a Service Purchase Order in the central accounting system**

If an agency has entered a contract on a Service Purchase Order on the central accounting system, the only thing the agency needs to do to comply with the statute is to follow the procedures on page 8 (making the image of the contract available.)

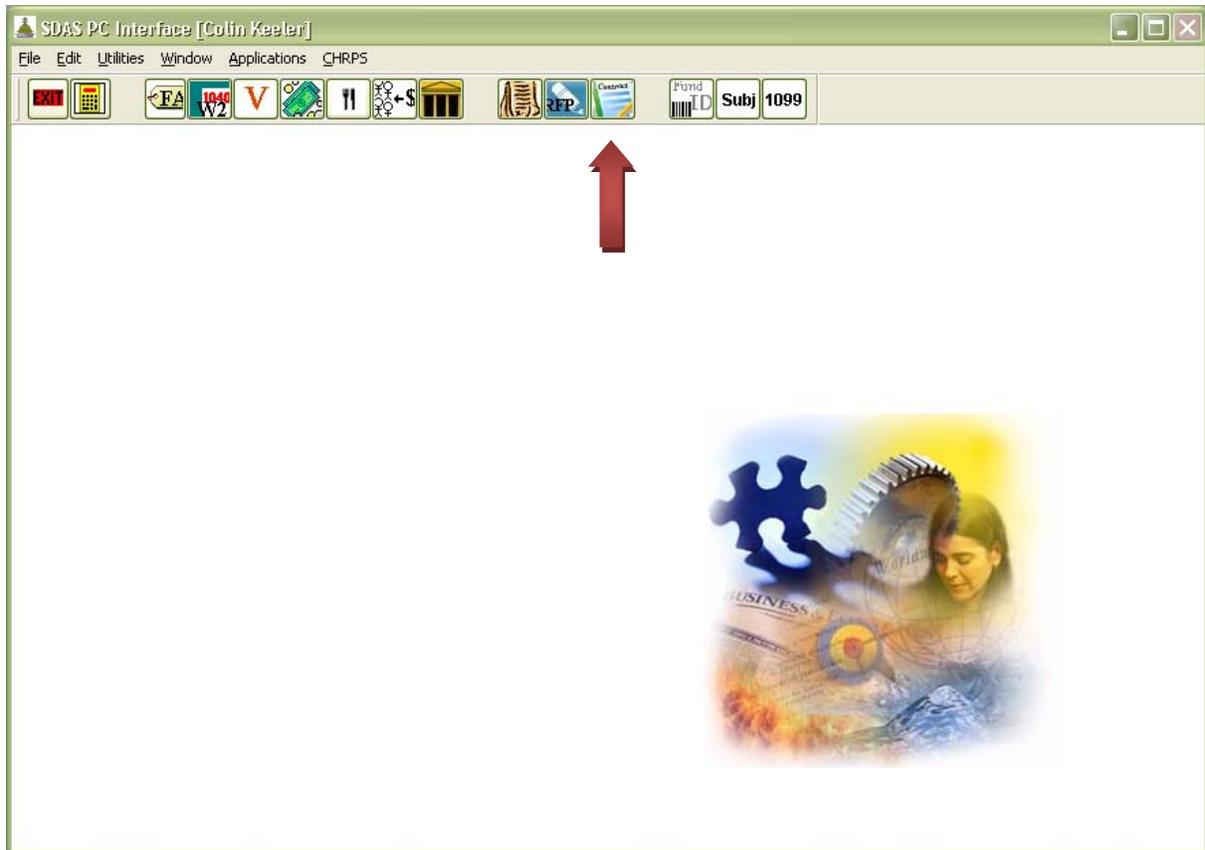
\*\* see the FAQ about putting Service POs on the web

- **Contracts not falling into the first two categories**

Any contracts that an agency determines fall within the scope of SB82 which were not recorded on the Register of Proposals and were not entered as a Service Purchase Order on the central accounting system will need to be posted on OpenSD using the procedures contained in the remainder of this document.

## SDAS Contract Maintenance for OpenSD Procedures

### Accessing the OpenSD Contracts Module

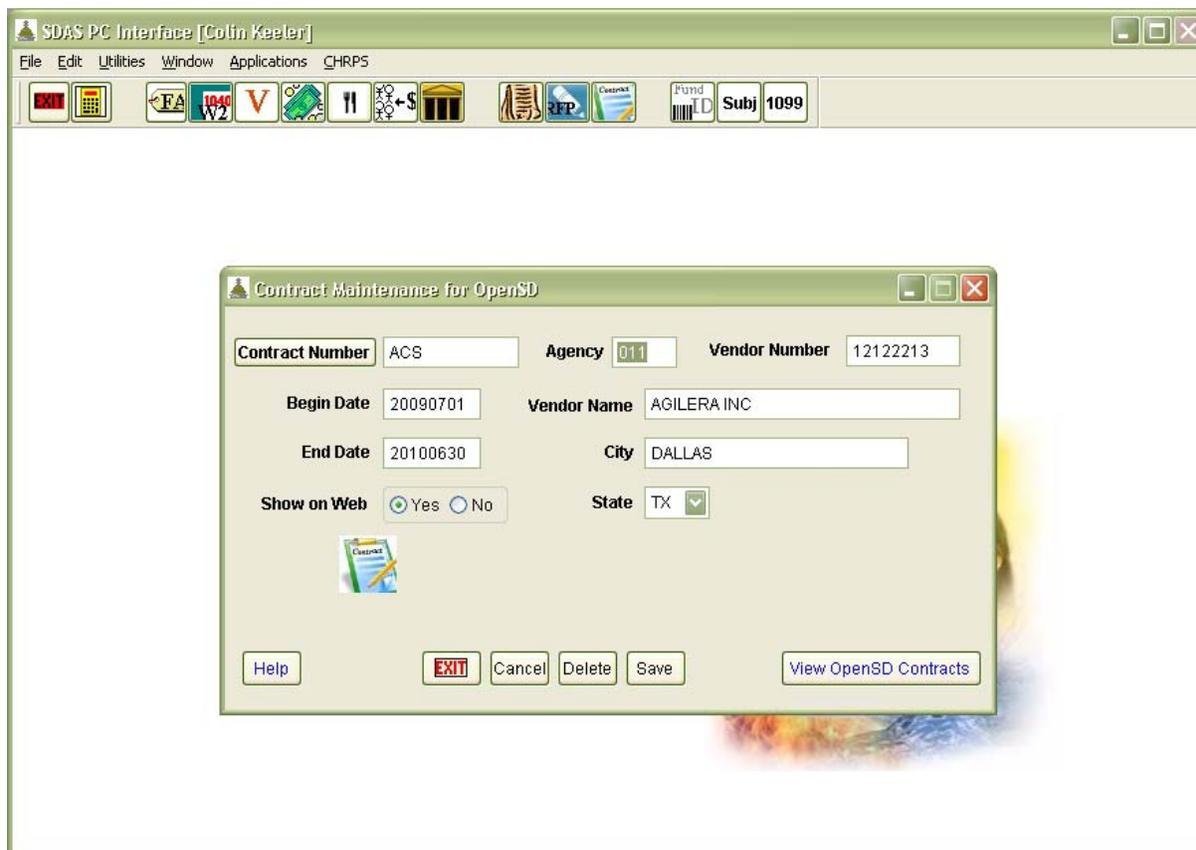


Any SDAS user with access to the RFP Register module will automatically have access to the Contract Maintenance for OpenSD module.

Access is requested through the person in your agency designated to submit security requests to BFM through CAPS (<http://www.state.sd.us/bfm/caps/>).

## SDAS Contract Maintenance for OpenSD Procedures

### Adding/Editing Contract Information



The screenshot displays the SDAS PC Interface [Colin Keeler] window. The main window has a menu bar (File, Edit, Utilities, Window, Applications, CHRPS) and a toolbar with various icons. A dialog box titled "Contract Maintenance for OpenSD" is open, containing the following fields and controls:

Contract Number	ACS	Agency	011	Vendor Number	12122213
Begin Date	20090701	Vendor Name	AGILERA INC		
End Date	20100630	City	DALLAS		
Show on Web	<input checked="" type="radio"/> Yes <input type="radio"/> No	State	TX		

At the bottom of the dialog box, there is a "Help" button, a group of buttons including "EXIT", "Cancel", "Delete", and "Save", and a "View OpenSD Contracts" button.

To add a new contract, simply type the contract number in the field and press <TAB>. If the contract already exists the information will be brought up, otherwise you simply continue to enter the other fields and then click (SAVE).

The fields are:

**Contract Number:** Whatever unique contract number is assigned by the agency. This could be the state auditor contract number, the service PO number, or any other number chosen by the agency.

**Agency:** This field will contain the 2 or 3 digit agency code assigned to your department or bureau. Typically you will not be able to enter this information; it will be displayed for you in a read-only format.

**Vendor Number:** This is the vendor number (no vendor group) assigned by the central accounting system. Typically this is an 8 digit number. The Vendor Name, City and State fields will default to the values on the first vendor (if there are multiple groups) found in the accounting system that matches.

## SDAS Contract Maintenance for OpenSD Procedures

**Begin Date:** Enter the beginning date of the contract in CCYYMMDD format.

**End Date:** Enter the ending date of the contract in CCYYMMDD format.

**Show on Web:** Click “Y” to enable this contract to be available on the OpenSD search list. “N” will prevent this record from showing up on the search list. This flag is not dependent upon whether or not a .PDF image of the contract exists on the M:\ drive. In other words, the image may not exist but if you set this flag to “Y” the contract record will still show up. At that point, if somebody attempts to view the contract from OpenSD they will get a “Page Not Found” error until you place the image of the contract on the M:\ drive.



The picture below the “Show on Web” field will look like the first icon above if the contract .PDF is present, or like the second with the red X on it if the contract image is not present.

**Vendor Name:** This field will default to the name on the accounting system associated with the first vendor group found matching the vendor number entered. You may freely change this name here in Contract Maintenance with no effect to the vendor at all. This is simply the name used to search for contracts and shown on the web.

**City:** The vendor’s city, shown on the web.

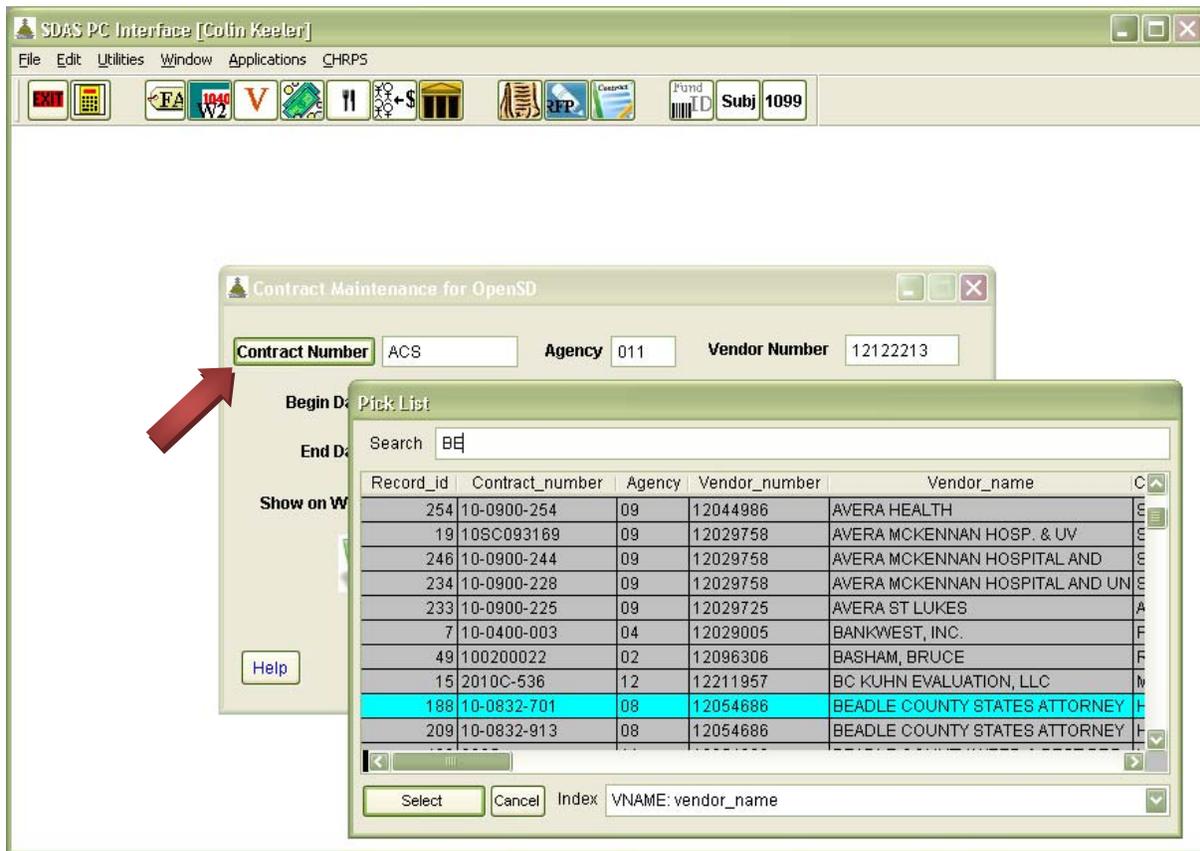
**State:** The vendor’s state, shown on the web.

The buttons on the bottom of the Contract Maintenance form have the following functions:

- (Help) Brings up this procedure document.
- (Exit) Exits the Contract Maintenance form.
- (Cancel) Clears all the information on the Contract Maintenance form.
- (Delete) After confirmation, deletes the contract record (not the .PDF).
- (Save) Saves the existing record.
- (View OpenSD Contracts) Opens a browser window with the contract search page.

# SDAS Contract Maintenance for OpenSD Procedures

## Locating an Existing Contract



If you've entered contract information in the RFP Register of Proposals module, or if a service contract has already been entered on the central accounting system, your basic contract information will already be entered for you. You can select the contract from a list by clicking on the (Contract Number) button, or simply type in the contract number in the field and the information will be retrieved.

From the pick list you can search for a contract by Vendor Name by simply starting to type the vendor name in the search field. You can also change the search index at the bottom of the pick list to be by contract number instead of vendor name.

Click (Select) from the pick list to retrieve that contract information.

## SDAS Contract Maintenance for OpenSD Procedures

### Placing the Contract Image on OpenSD

Agency personal who are given security to the RFP Register of Proposals and the Contract Maintenance for OpenSD modules are also provided access to your agency's directory on the shared M:\ drive to store copies of your contracts.

This process involves:

1. Scan (and then electronically redact as necessary);  
-or-  
Photocopy, (manually redact as necessary), then scan.
2. Save the scan as a .PDF document, with the file name the same as the contract number that was entered in SDAS or as the Service PO number in the central accounting system.
3. Copy the .PDF file into the **M:\All\_SD\Contracts\XXX\** directory (where XXX is your agency department number.)
4. Verify that the link works from Open.SD.gov. You can use the button on Contract Maintenance form to bring up the contract search page.

## **SDAS Contract Maintenance for OpenSD Procedures**

### **Deleting Contracts and Images**

If you wish to delete a contract from the OpenSD Contracts table, simply select the contract on the form and click the (Delete) button. You will be asked to confirm the deletion.

Deleting the record from the table does not delete the image from the web, however the image will no longer be able to be searched and won't be linked from anywhere.

You do not need to delete contracts one year after they have ended. The contract record and the image of the contract will both be automatically deleted during month-end processing one year after the ending date of the contract.

Special notes regarding deletions:

- If you delete a contract record for a Service Purchase Order entered on the accounting system, it will be automatically re-added during the next accounts payable cycle.
- If the image of the Service PO contract is still on the M:\ drive, the "Show on Web" flag will be automatically set to "Y" and your contract will re-appear on OpenSD.
- If the image of the Service PO is not on the M:\ drive, the "Show on Web" flag will be set to "N".
  
- If you delete a contract record that was entered as part of the Register of Proposals, it will automatically be re-added during the next accounts payable cycle.

## SDAS Contract Maintenance for OpenSD Procedures

### Frequently Asked Questions

Q: Who is responsible for complying with SB82?

A: **The state agency entering into a contract is responsible for determining if the contract falls under the statute.**

Q: What contracts have to be shown on the “searchable website created pursuant to §1-27-45?

A: **Any contract for services, professional services, or supplies that has an amount greater than \$10,000 or is for consulting or legal services.**

Q: What constitutes services, professional services, or supplies?

A: **These terms are defined in the procurement code in §5-18.**

"Services," furnishing of labor, time, or effort by a contractor not involving the delivery of a specific end product other than reports which are merely incidental to the required performance;

"Professional services," services arising out of a vocation, calling, occupation, or employment involving specialized knowledge, labor, or skill, and the labor or skill involved is predominantly mental or intellectual, rather than physical or manual;

"Supplies," any property, including equipment, materials, and printing;

Q: I deleted a service purchase order from the contract table and it keeps coming back, but I don't want it to appear on OpenSD because the statute doesn't apply to it. How do I make sure it doesn't show up on the web?

A: **Delete, or don't create, the .PDF on the M:\ drive. Then when the service PO re-appears the “Show on Web” flag will be set to “N”.**

Q: What's the easiest way to get my Service POs listed on the web, and flagged so they show up on OpenSD?

A: **Scan the image and place it on the M:\ drive at the time you enter your service PO on the accounting system. Then the next time an AP payment cycle is run everything will be automatically set up for you.**