ProjectTeam Quick Reference Guide

CONTRACTS-PROCUREMENT REQUEST (PR)

*The **Procurement Request (PR**) approval process is managed in the Contracts form. The Procurement Team will create the form, enter the applicable data and then start the corresponding workflow(s). **Preferred Vendors** and **Sole Source** data is tracked in the same record.*

*The first step sends the record to the **Project Manager (PM)** for approval. When the PM passes the workflow, the **SAP Admistrator** is notified with instructions to run the applicable Merge Template to submit to SAP. If approved, the SAP Administrator will pass the workflow which notifies the **Procurement Team**.*

PR Approval Workflow Diagram:

To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

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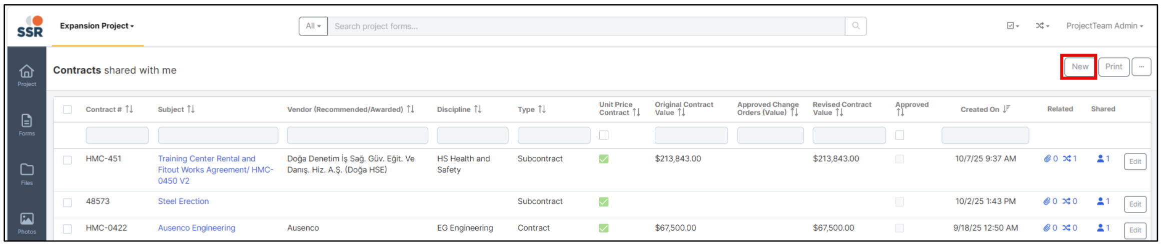
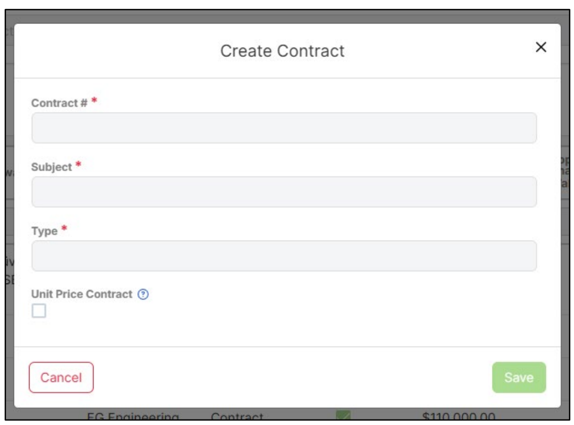
CREATE THE CONTRACT

1) The Procurement Team will create a new Contract record and enter the Details at the top of the page and then complete the data fields for the applicable process(s).
   a. Clicking **New** from the Contracts log view will open the Create Contract modal with all the required fields.



      i. Enter the **Contract #.**
      ii. Enter the **Subject.**
      iii. Select **Subcontract** in the **Type** field.
      iv. Check **Unit Price Contract** if you want the Schedule of Values to include Qty, and Unit Cost fields.
      v. Click **Save** to open the full list of available fields.



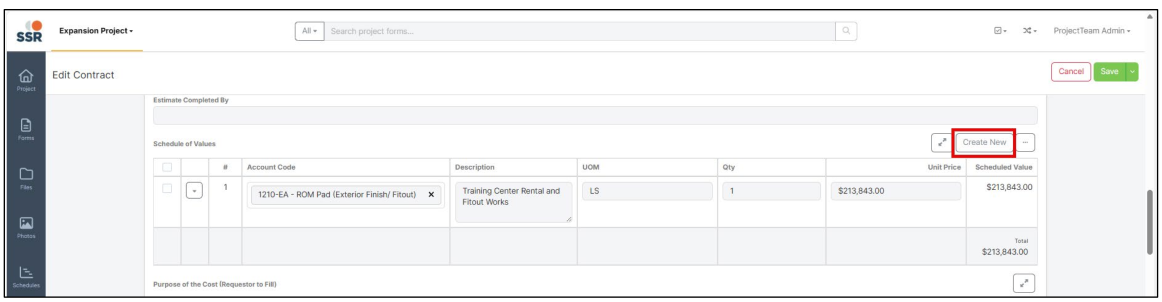
   b. Enter any additional information in the fields at the top of the page.

*The bidding process is managed outside of ProjectTeam but the **Bidding Data** section of the Contracts form is an *optional* section that allows you to also store bidding information in the project within ProjectTeam. Data entered in this section is available to be accessed internally; external users will not see the Bidding Data section in the Contract. If the bidders list is added to this section, there is a Bidders List Merge Template available to print.

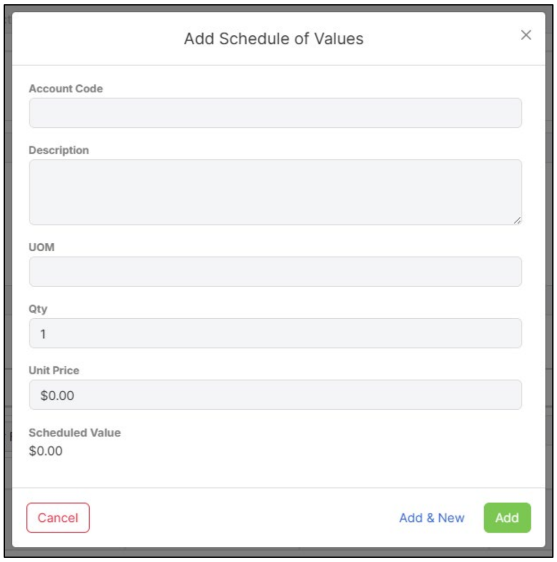
If the PR is a **Preferred Vendor** or **Sole Source** **Award**, there are additional fields to be completed.

   a. **Purchase Request Data**

i. Enter the **SAP PR Number**.
ii. Enter the **PR Date**.
iii. Select **Requested For** and **Budget Owner** contacts. *If the contact is not in the list, you can type in the field*.
iv. Enter data in the **Department**, **Cost Center**, **Scope of Purchase**, **Description of Purchase**, **Delivery Address**, and **Justification of PR** fields.
v. Enter the Date Needed.
vi. Add additional notes clarifying details of the purchase in the **PR Notes** field.
vii. Check **Trend Notice Required?** and **Need Assistance with Tender Process?,** as applicable.
viii. Select the **Source Strategy**.
ix. Enter the **Estimated Value** for the PR.
x. Check **Already Budgeted?** and **Price Estimate Received from Vendor?,** as applicable.
xi. Select the **Estimate Completed By** contact. *If the contact is not in the list, you can type in the field*.
xii. Click **Create New** at the top of the **Schedule of Values** collection.



1. Select the **Account Code**.
2. Enter a **Description**.
3. If you selected Unit Price Contract when creating the record, you will enter the **UOM** (Unit of Measure), **Qty**, and **Unit Price** fields to calculate the **Scheduled Value** amount.
4. Click **Add** to add the data entered in the Add Schedule of Values modal as a row in the Schedule of Values (SOV) or click **Add & New** to create another row for the SOV.



xiii. Select each applicable **Purpose** and enter **Notes** for each one in the **Purpose of the Cost** fields.

b. **Bidding Data** *(optional)*

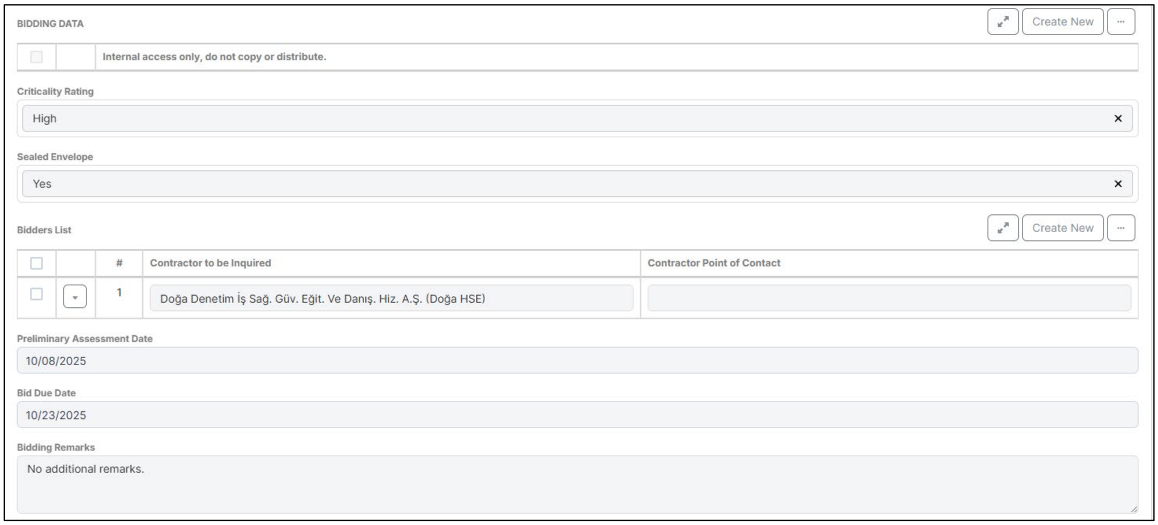
i. Select The **Criticality Rating** and *Yes* or *No* for the **Sealed Envelope** field.

ii. Click **Create New** at the top of the **Bidders List** collection.

5. Enter the **Contract to be Inquired** and the **Contractor Point of Contact** in the Add Bidders List modal.
6. Click **Add** to add the data entered in the Add Bidders List modal as a row in the Bidders List or click **Add & New** to create another row for the list.

iii. Enter the **Preliminary Assessment Date**, **Scheduled Inquiry Issue Date**, and **Bid Due Date**.

iv. Enter any applicable **Bidding Remarks**.


BIDDING DATA

Internal access only, do not copy or distribute.

Criticality Rating: High

Sealed Envelope: Yes

Bidders List

#	Contractor to be Inquired	Contractor Point of Contact
1	Doğa Denetim İş Sağ. Güv. Eğit. Ve Danış. Hiz. A.Ş. (Doğa HSE)	

Preliminary Assessment Date: 10/08/2025

Bid Due Date: 10/23/2025

Bidding Remarks: No additional remarks.

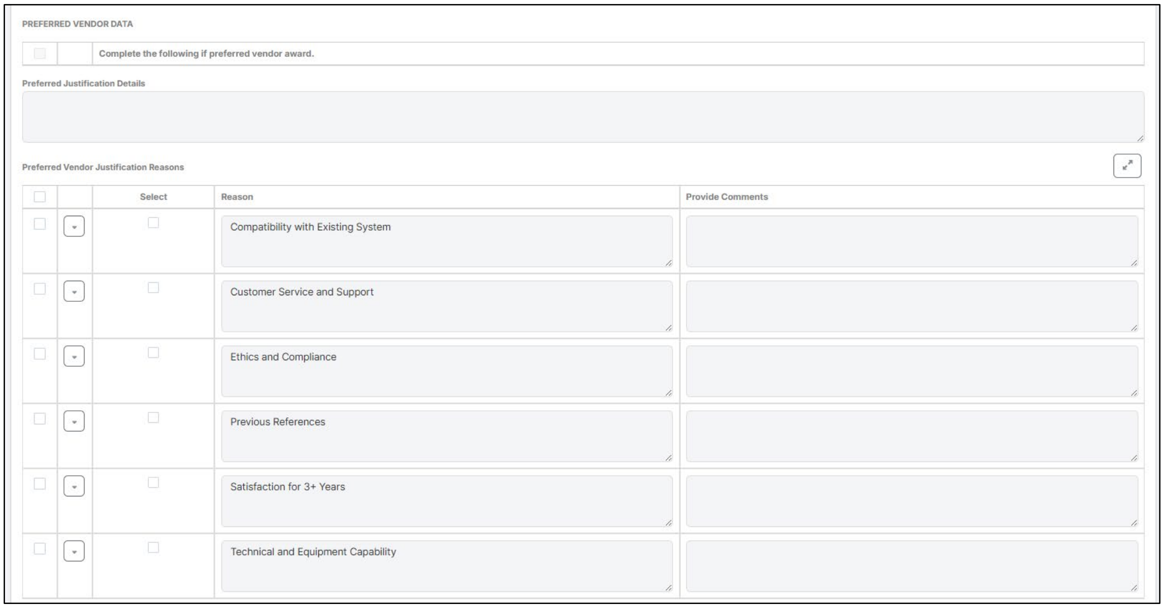
v. Run the Bidders List Merge Template. *See the steps in 4a of the* ***Run the Merge Template*** *in this QRG for help.*

c. For **Preferred Vendor Awards:**

i. Enter the **Preferred Justification Details**.

ii. Complete the **Preferred Vendor Justification Reasons** collection.

7. Select each applicable **Reason**.
8. **Provide Comments**.


PREFERRED VENDOR DATA

Complete the following if preferred vendor award.

Preferred Justification Details

Preferred Vendor Justification Reasons

Select	Reason	Provide Comments
	Compatibility with Existing System	
	Customer Service and Support	
	Ethics and Compliance	
	Previous References	
	Satisfaction for 3+ Years	
	Technical and Equipment Capability	

d. For **Sole Source Awards**:

i. Check the **Sole Source Contract** box.

ii. Select the **Sole Source Request Date, Purchase Risk Level,** and **Procurement Threshold.**

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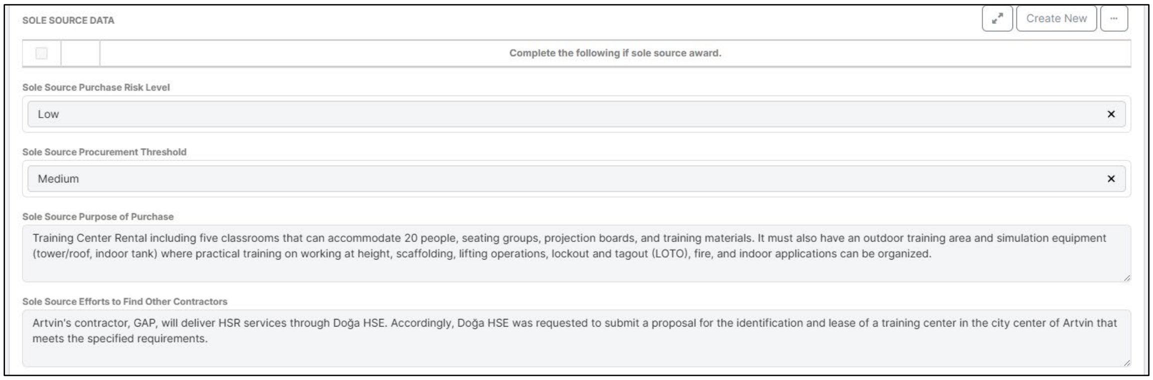
iii. Enter the **Purpose of Purchase** and **Efforts to Find other Contractors.**



iv. Check the box and enter **Notes** for each applicable **Reason** in the **Sole Source Justification Reasons** fields.

v. Entered the **Scheduled Inquiry Issue Date**.

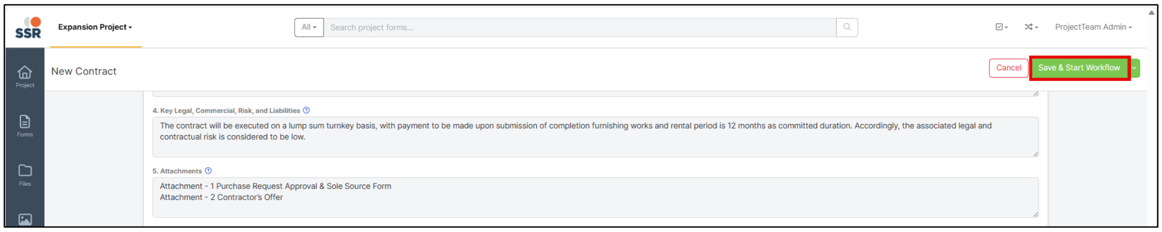
e. Start the **PR Approval** workflow. *See **Start the Workflow** in this QRG for help.*

f. Upload any applicable documents to the **Attachments** section of the record. *See **Adding Attachments to Forms** for help with Attachments.*

START THE WORKFLOW

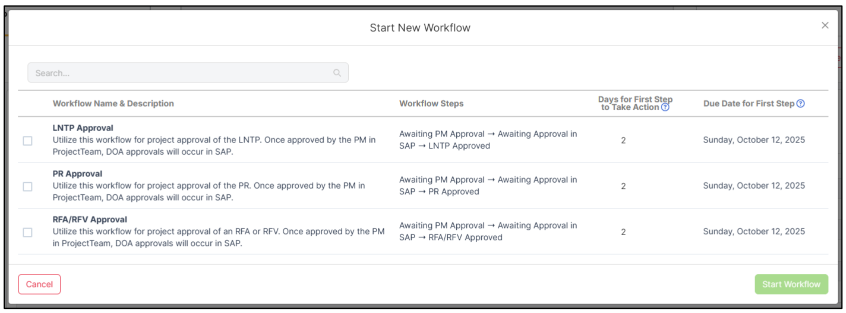
After a record is saved, a user can navigate to the Workflows panel of the open record and click **Start New** to open the list of workflows.

a. Click **Save & Start Workflow** in a new record or **Start New** in the Workflows panel of an existing record.



b. Check the box beside the PR Approval workflow.

c. Click **Start Workflow** to send the first workflow step to the PM for review and approval. *See* ***Approve for SAP Submittal*** *in this QRG.*

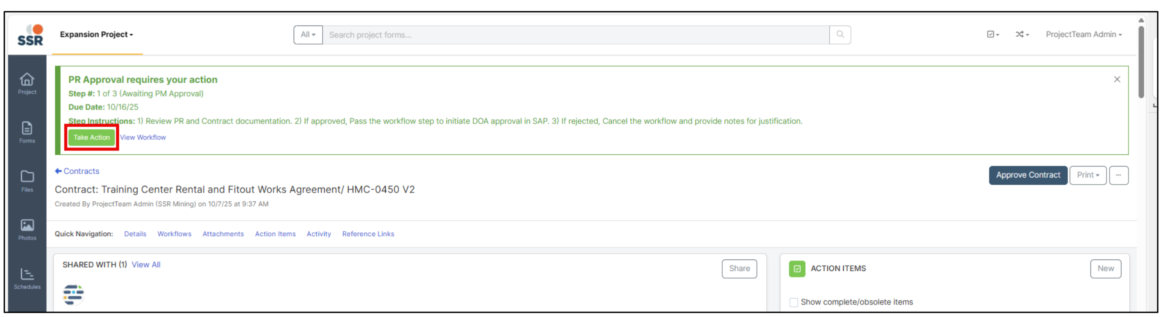


APPROVE FOR SAP SUBMITTAL

1) When the workflow is started for any of the three approval processes, the **Project Manager** will be assigned the first step.

   a. **Review** the applicable section of the record.

   b. Click **Take Action** from the top of the page or from the Workflow panel.



   c. If Approved, **Pass** the workflow step to initiate DOA approval in SAP.

      i. **Pass** moves the workflow to the SAP Administrator with instructions to Run the Merge Temple and submit in SAP. *See* ***Run the Merge Template*** *in this QRG.*

   d. If Rejected, **Cancel** the workflow and provide notes for justification.

      i. **Cancel** notifies the workflow initiator and marks the workflow Cancelled.

      ii. The Procurement Team can **Restart** the workflow at any time.

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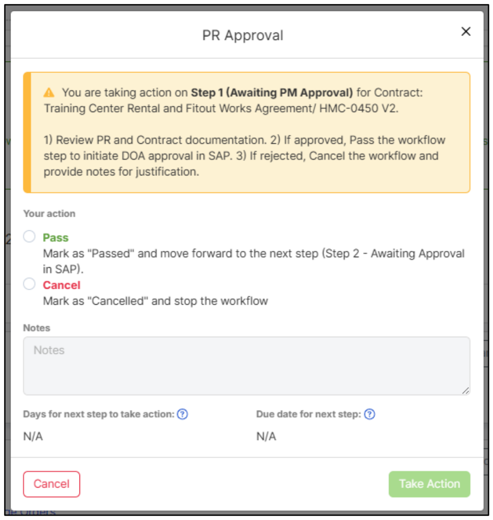


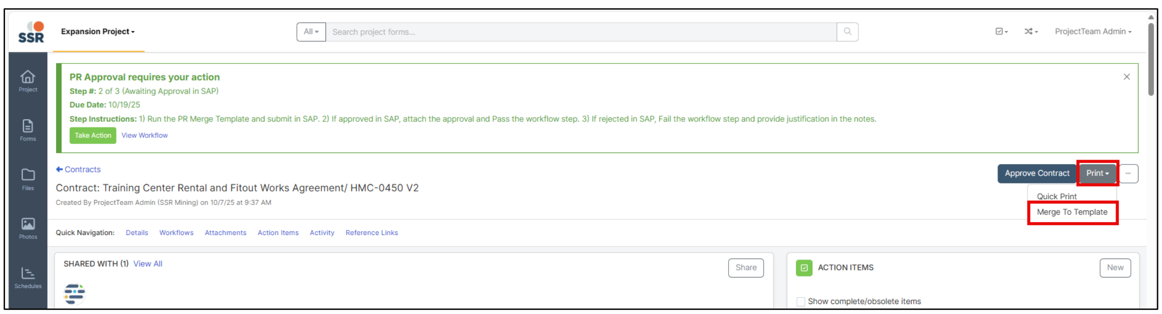
RUN THE MERGE TEMPLATE TO SUBMIT TO SAP

2) When the Project Manager approves the PR and passes their workflow step, the workflow moves to the **SAP Administrator** with instructions to run the merge template to submit to SAP. The **Bidders List** is also available as a merge template.

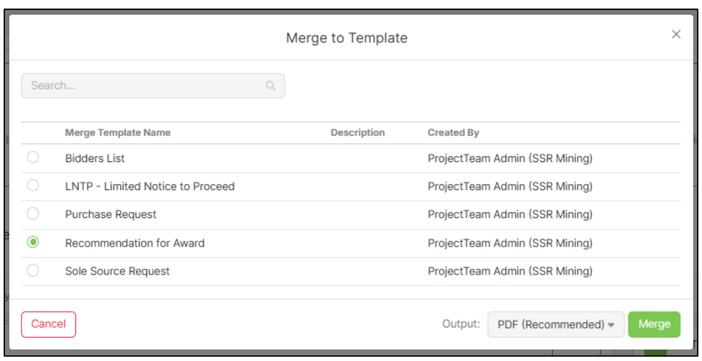
a. Run the **Merge Template**.

i. From the open Contract record, click **Print**.

ii. Select **Merge to Template**.



iii. **Select** and **Run** the Merge Template for the applicable approval process.



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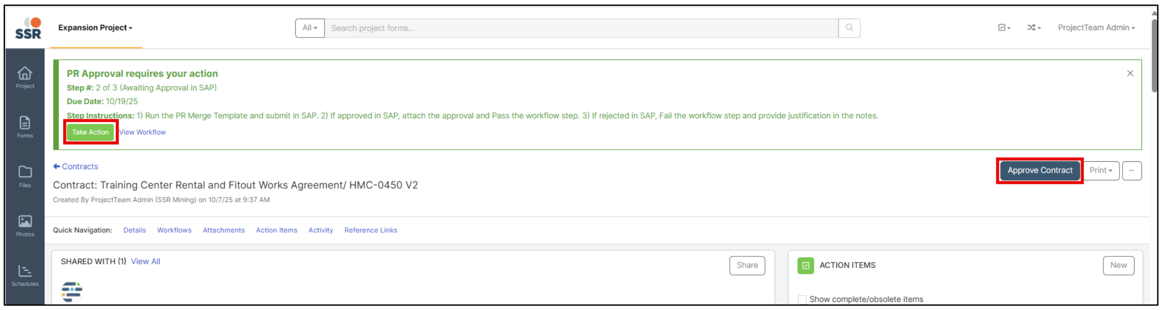
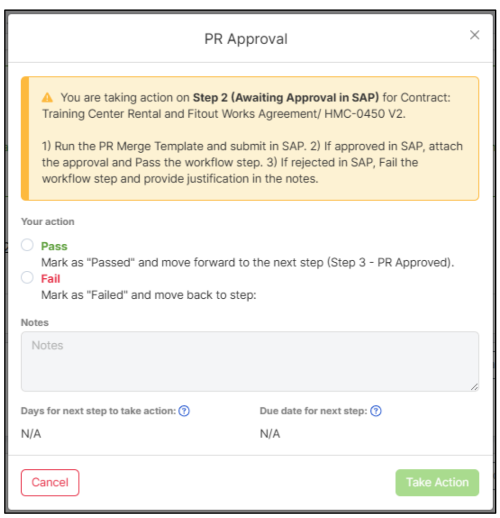
- iv. **Save** and **Download** the document. *Saved Merge Templates are accessible in the Merge Documents Form.*
- b. **Submit** the downloaded document to SAP.
- c. If **Approved in SAP**:
  - i. Open the record and click **Approve Contract** from the top of the page.
  - ii. Upload the approval to the **Attachments** panel of the Contract record. *See **Adding Attachments to Forms** in the help pages for more help.*
  - iii. Click **Take Action** from the top of the page or from the Workflow panel.



  - iv. Enter any applicable **Notes.**
  - v. **Pass** the workflow step.
    1. **Pass** returns the workflow to the Procurement Team.
- d. If **Rejected in SAP**:
  - i. Click **Take Action** from the top of the page or from the Workflow panel.
  - ii. Provide justification in the **Notes.**
  - iii. **Fail** the workflow step.
    1. **Fail** returns the workflow to the PM.



PROCEEDING WITH AN APPROVED PR

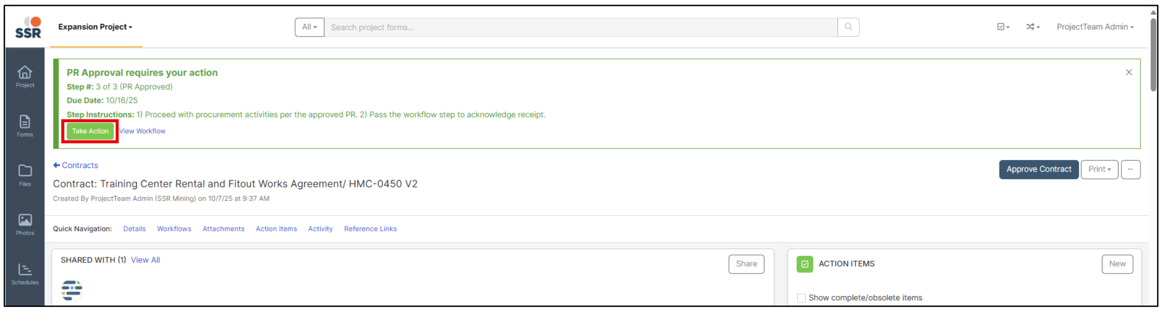
3) When the PR is approved in SAP and the SAP Administrator passes the workflow step, the workflow will be returned to the **Procurement Team** with instructions for proceeding.

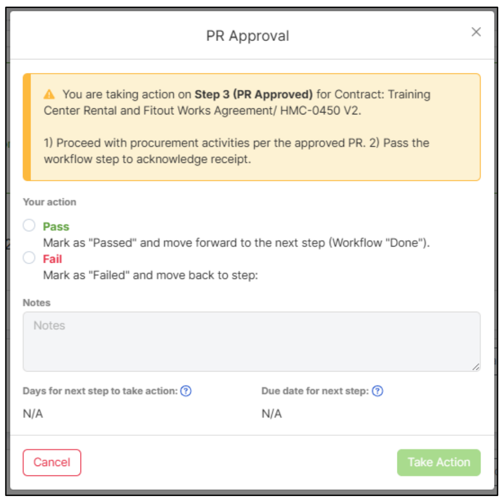
a. **Procurement Request**

i. Proceed with procurement activities per the approved PR.

ii. Click **Take Action** from the top of the page or from the Workflow panel.

iii. **Pass** the workflow step to acknowledge receipt.





RESOURCES

Help Pages:

[Start a workflow on a document]

[Print a Merge Template]

[Adding Attachments to Forms]

Additional Resources:

Basic Navigation

Batch Import

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Sharing Records

Adding Attachments

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