



Master Contract Training Guide

Date Created: 7/14/2021

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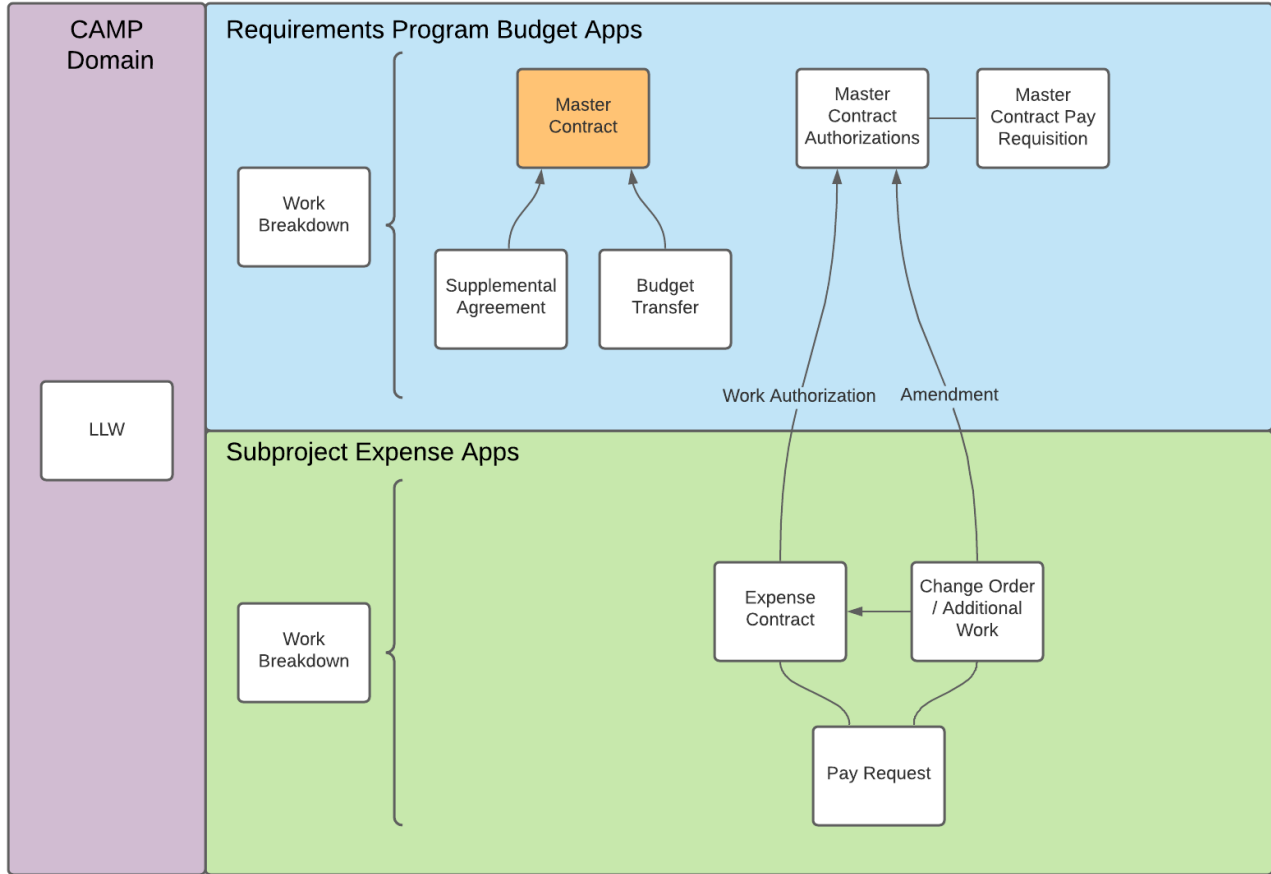
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About

The Master Contract (previously the Work Type cost lines of the Budget Contract in PCM) contains the contract value with Work Type cost items.

Workflow Diagram



Process Overview

The SCA CM Facilitator creates Master Contracts using the contract summary information e.g., Contract Number, Date, Title, Description of Work, Type, etc.

Note: The SCA CM Facilitator enters the same Work Type cost items in Master Contract that Finance entered in Oracle Financials.

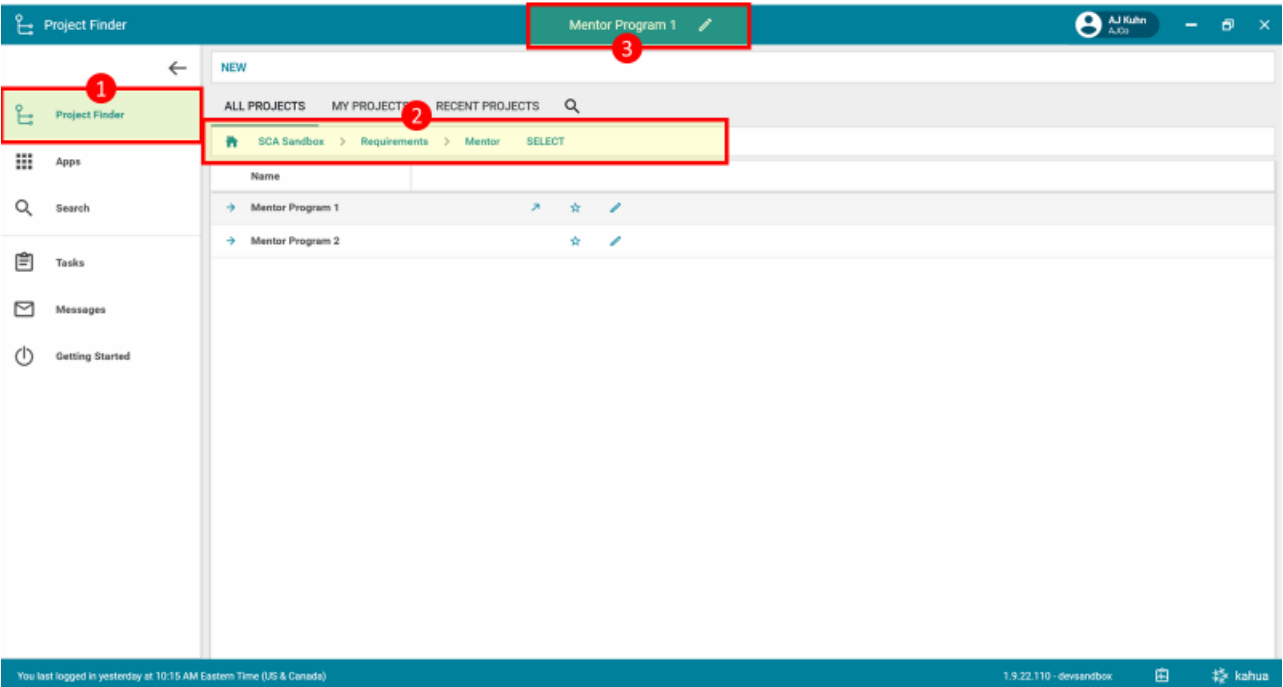
Step-by-Step Instructions

Create Master Contract

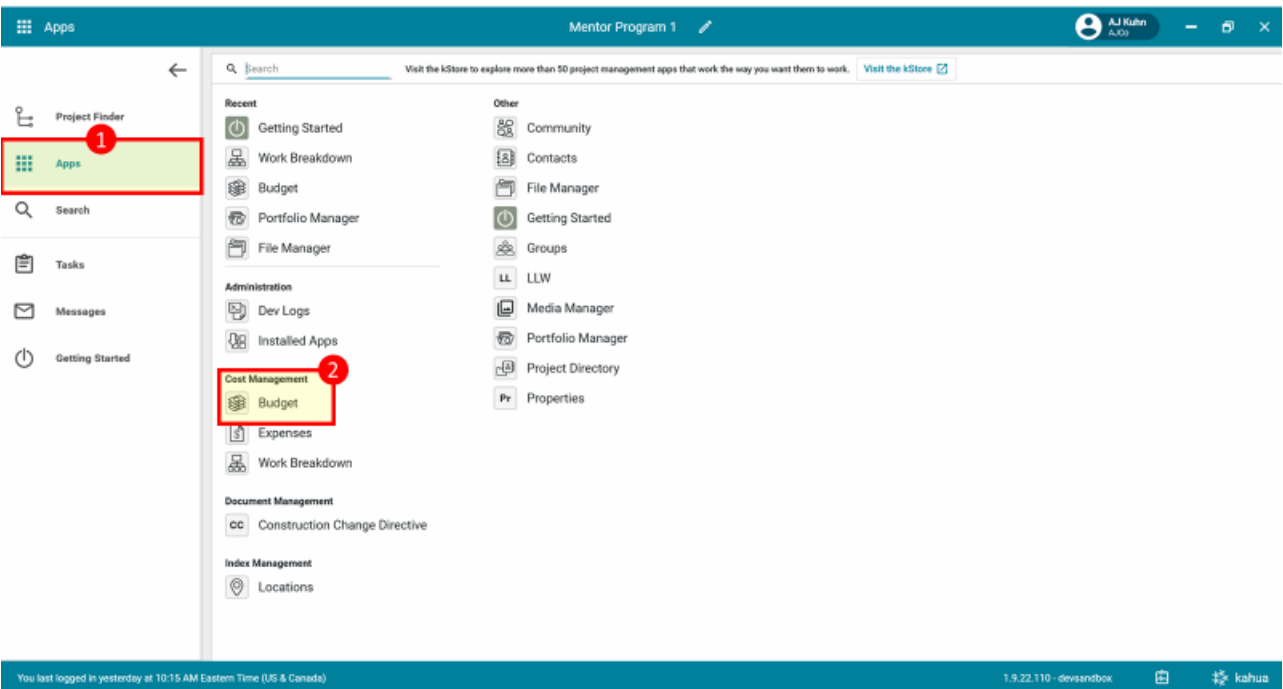
Role	Preceding Steps	Outcome
Operations Manager	Budget entered in Oracle Financials.	Master Contract is created with Work Type cost items.

Steps

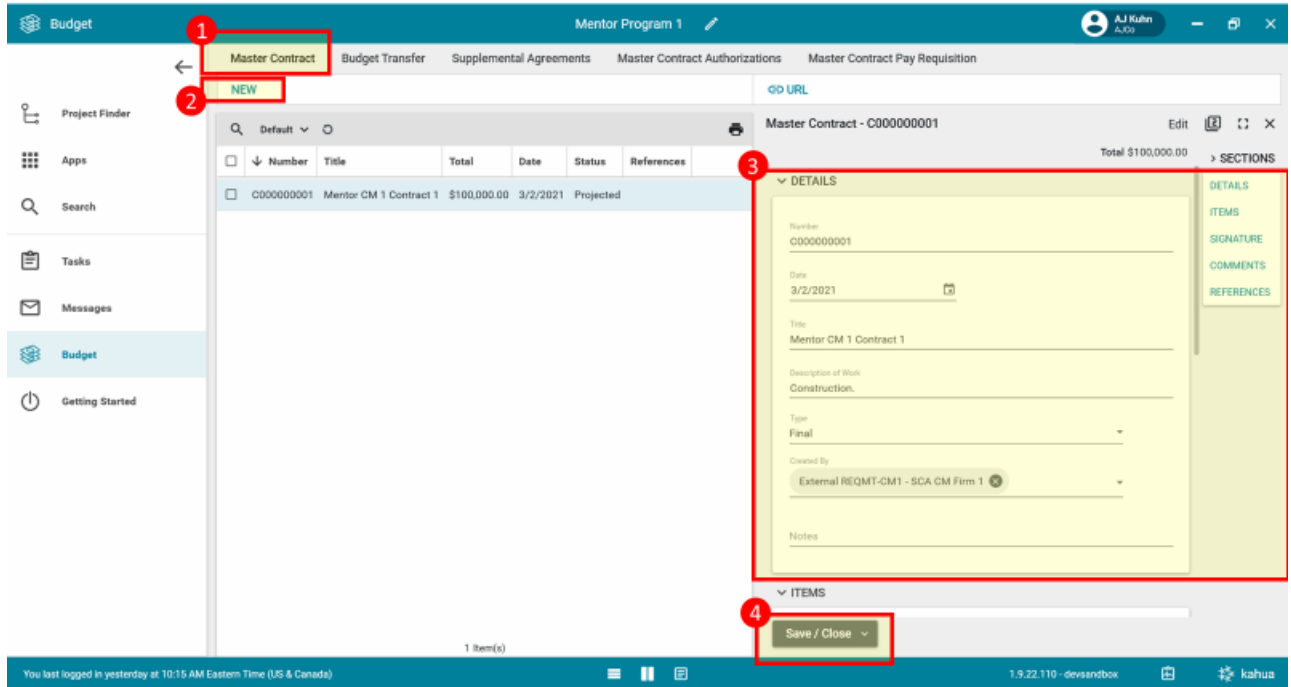
1. Go to Project Finder > Navigate to Mentor Program > Confirm you are in the correct Mentor Program



2. Go to 'Apps' > Select 'Budget' App



3. Select the 'Master Contract' tab > Click 'New' > Enter Required Fields > Click 'Save/Close'

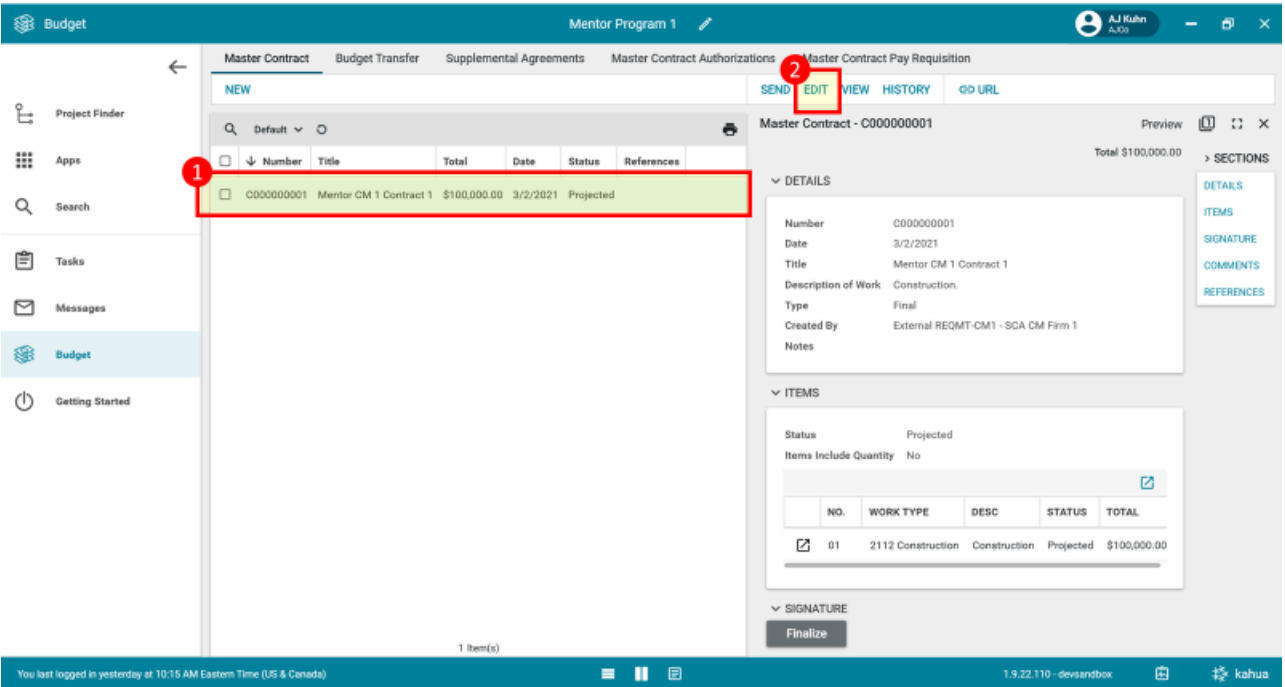


Update Master Contract

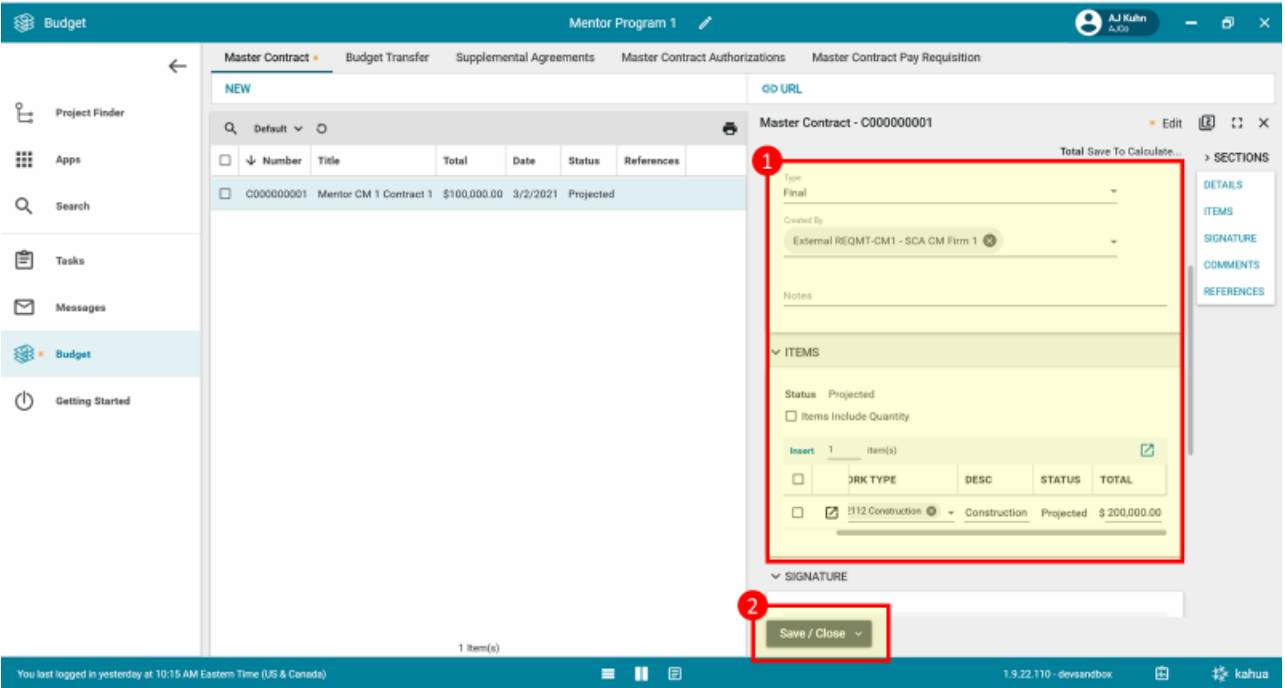
Role	Preceding Steps	Outcome
Operations Managers	Existing Master Contract is saved, not finalized.	Master Contract is updated.

Steps

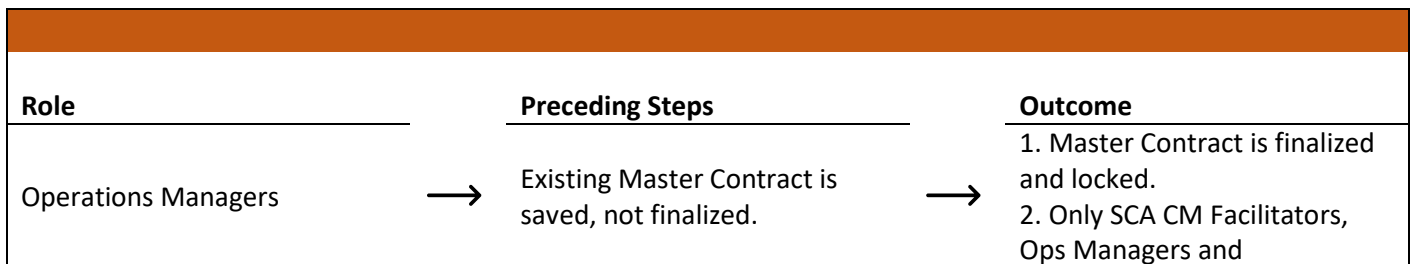
1. Go to 'Apps' > Select 'Budget' App > Select the 'Master Contract' tab > Click on Master Contract > Click 'Edit'



2. Update fields > Click 'Save/Close'



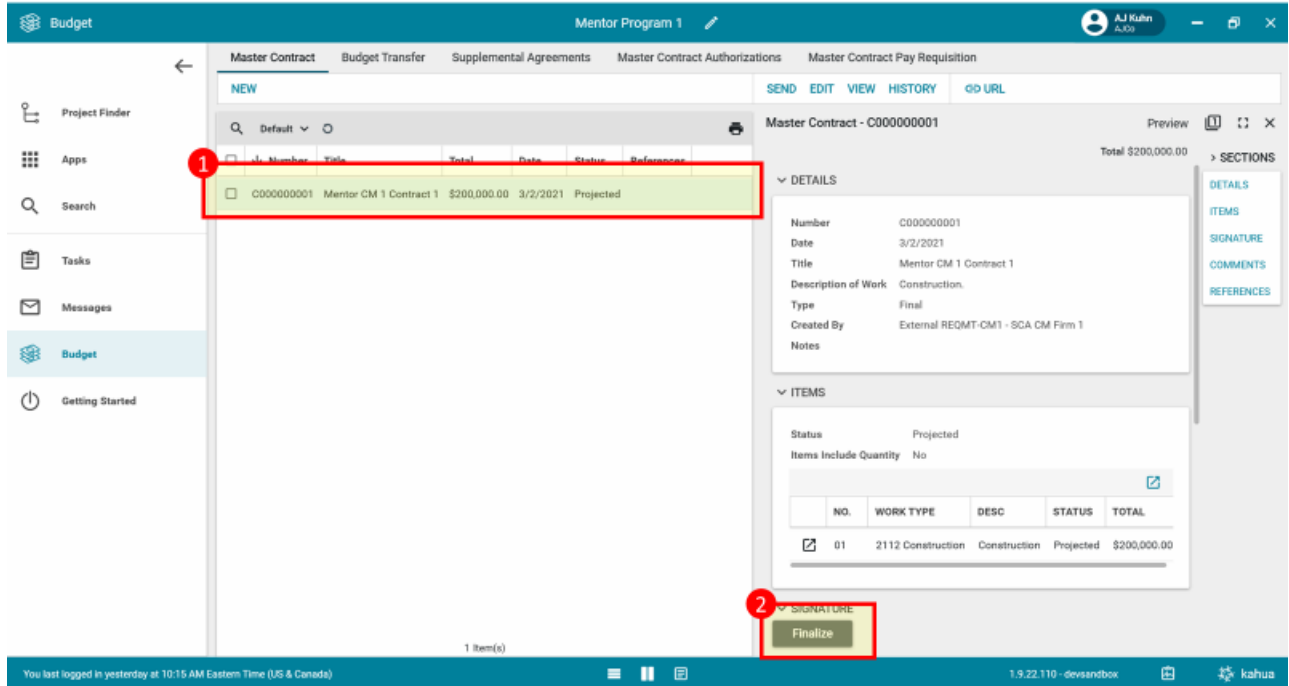
Finalize Master Contract



Administrators can unlock.
 3. Master Contract Work Authorizations can be made against Master Contract.

Step

Go to 'Apps' > Select 'Budget' App > Select the 'Master Contract' tab > Click on Master Contract > Click 'Finalize'

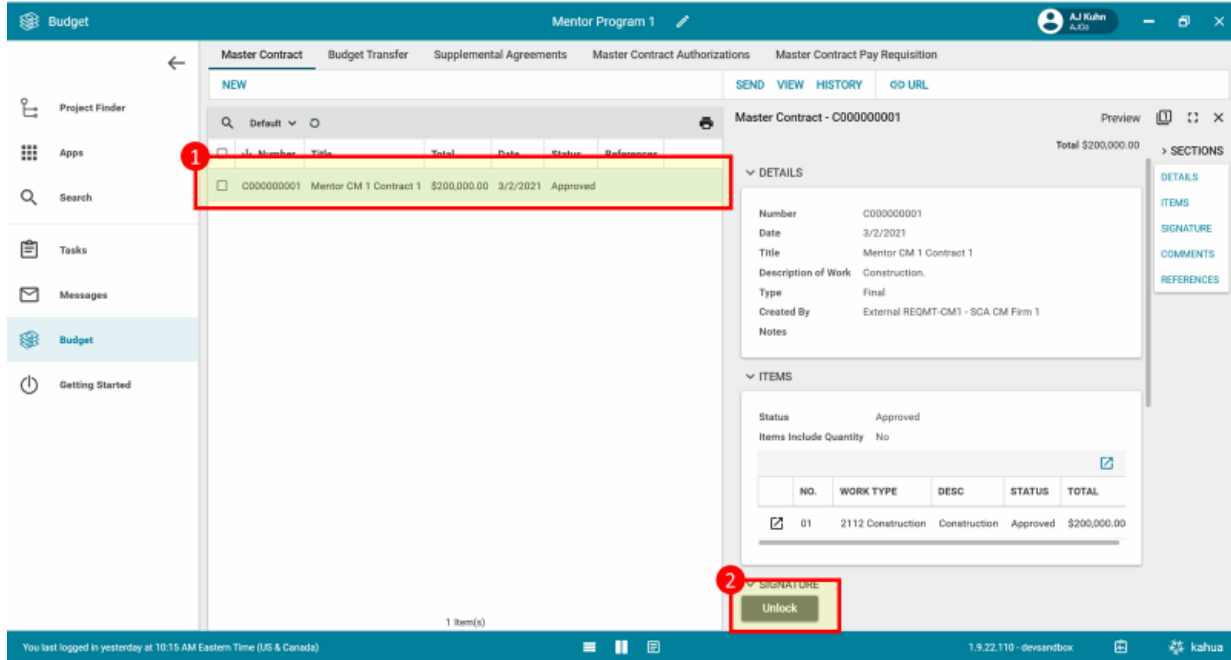


Unlock Master Contract

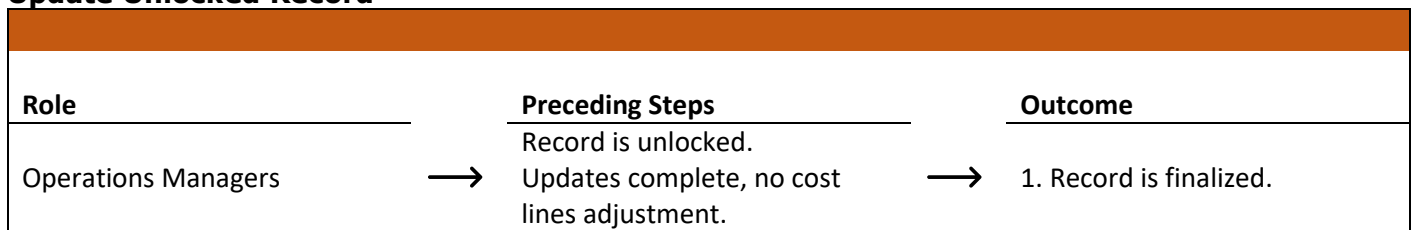
Role	Preceding Steps	Outcome
Operations Managers	→ Record is finalized (locked).	→ 1. Record is unlocked.

Step

Go to 'Apps' > Select 'Budget' App > Select the 'Master Contract' tab > Click on Master Contract > Click 'Unlock'



Update Unlocked Record



Step

Go to unlocked record > Click 'Edit' to update fields (do not modify Items table) > Click on 'Lock'

