

# SAP Ariba

**PROCUREMENT SERVICES DIVISION**



## **Procurement – USER Training**

*P2P Core*

How to Amend a  
Contract to Update the  
Preload Amount

**The purpose of this job aid is to show how to amend a contract to update the 'Preload Amount'. This field is used to track spend against the contract which occurred before it was published in the system. It may also be used to update the available amount on a Parent/Master contract if the accumulators on its Child/Subagreements were not set up correctly.**

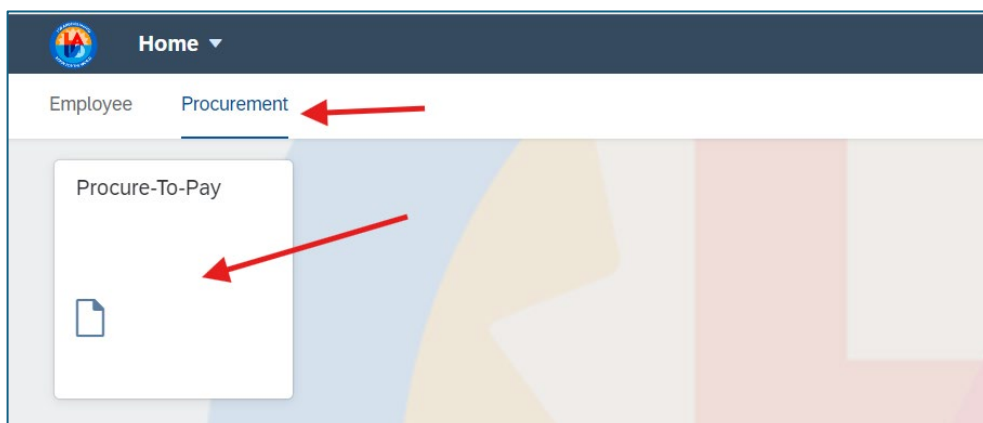
**1**

To access Ariba P2P Core, log in to your ESS (<https://ess.lausd.net/>) using your Single Sign On (SSO).



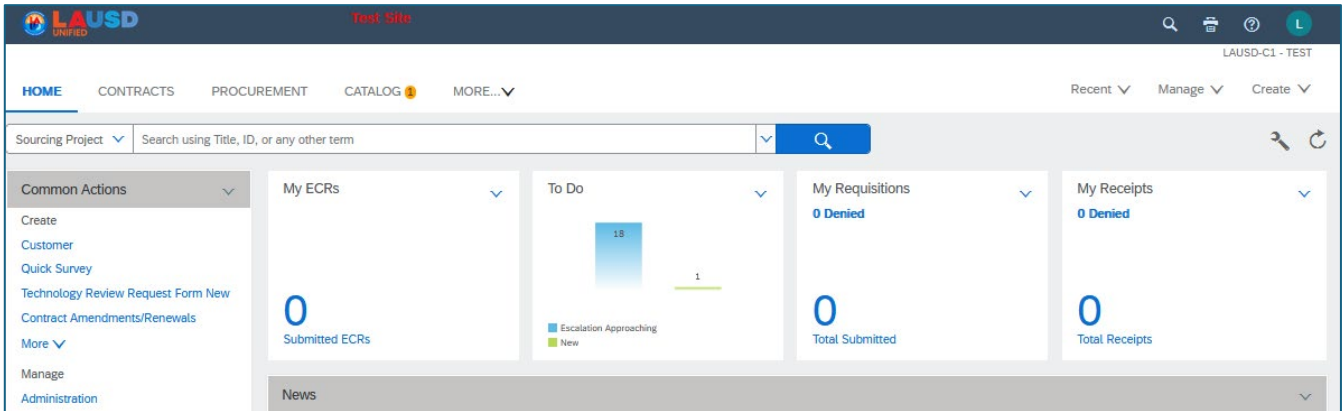
**2**

Click on the "Procure-To-Pay" tile under the Procurement Tab.



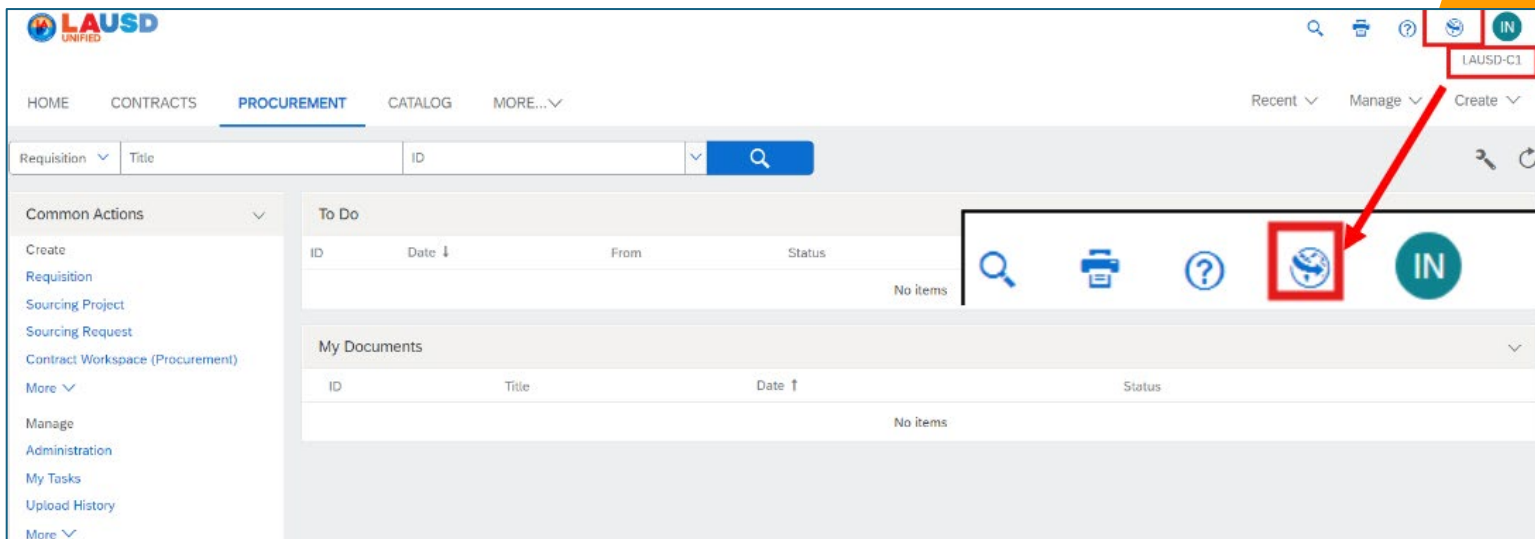
3

You will be directed to the P2P Core home page.



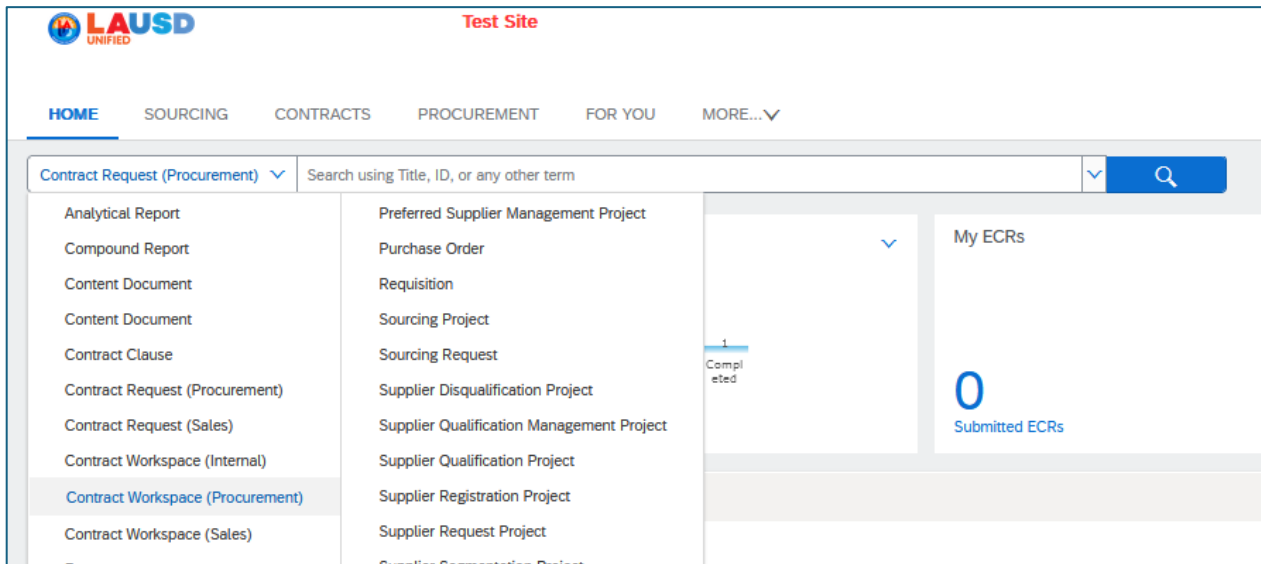
4

Ensure that you are in the **Parent Realm**. To change this, click on the globe icon and select 'LAUSD' from the dropdown menu.



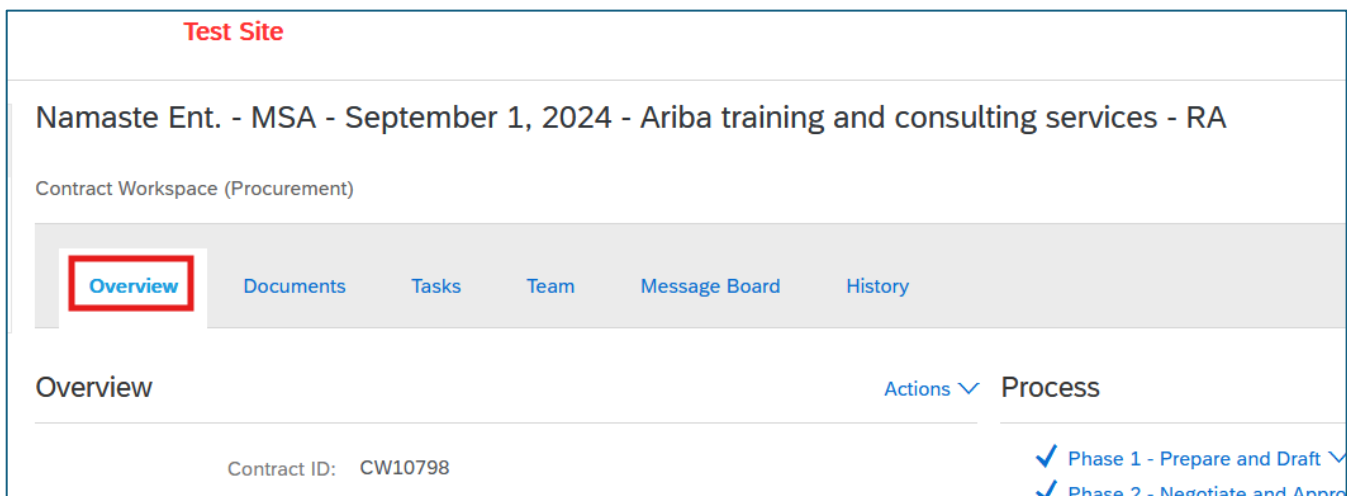
5

You can access **Contract Workspace** in several ways, but you can always search from your Home screen by changing the search dropdown and selecting '**Contract Workspace (Procurement)**'.



6

After opening the Contract Workspace of the contract, you need to amend. Ensure you are on the Overview tab.



7

After opening your Contract Workspace, click on the '**Documents**' tab.

Test Contract HC 03.04

ID CW14179  
Tasks: Incomplete Tasks: 0

Contract Workspace (Procurement)

Overview

Documents

Tasks

Team

Message Board

History

Overview

Actions ▾

Process

All Tasks

Contract ID: CW14179

Phase 1 - Prepare and Draft ▾

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Scroll down to the 'Contract Attributes' section and click the 'Actions' dropdown.

Contract Attributes

Actions ▾

Related ID:

ⓘ

Last Published:

Namaste Ent. - MSA - September 1, 2024 -... (you are currently viewing this)

ⓘ

Hierarchical Type:

Master Agreement

ⓘ

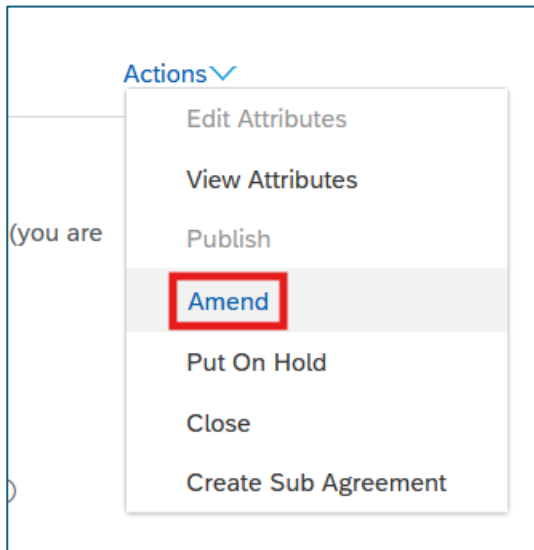
Contract Amount:

\$800,000 USD

ⓘ

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From the '**Action**' dropdown menu, select '**Amend**'.



10

First, open the dropdown for amendment type.

Amend Contract Namaste Ent. - MSA - September 1, 2024 - Ariba training and consulting services - RA OK Cancel

The **Amendment Type** indicates the reason for amending this contract. There are five types of amendments: **Renewal**, **Amendment**, **Administrative**, **Price Update** and **Termination**. [Less](#)

**Renewal type** amendments may be used to only renew a contract. **Amendment type** amendments support the change access throughout the entire project. **Administrative type** amendments only allow modifications to project overview and team data and do not change the project state. **Price Update type** amendments only allow modifications to existing items in line items document and project overview and team data. Price Update type amendments do not change the project state. **Termination type** amendments may only be used to immediately end a contract project.

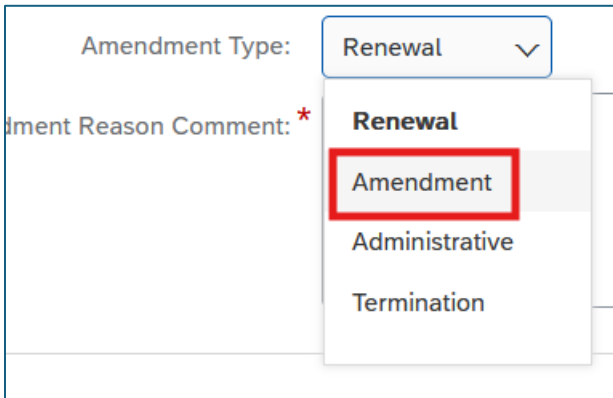
⚠ If the reason you are amending the Contract is not **Administrative**, the newly created version of the Contract is pushed to Contract Compliance.

Amendment Type: Renewal ▼

Amendment Reason Comment: \*

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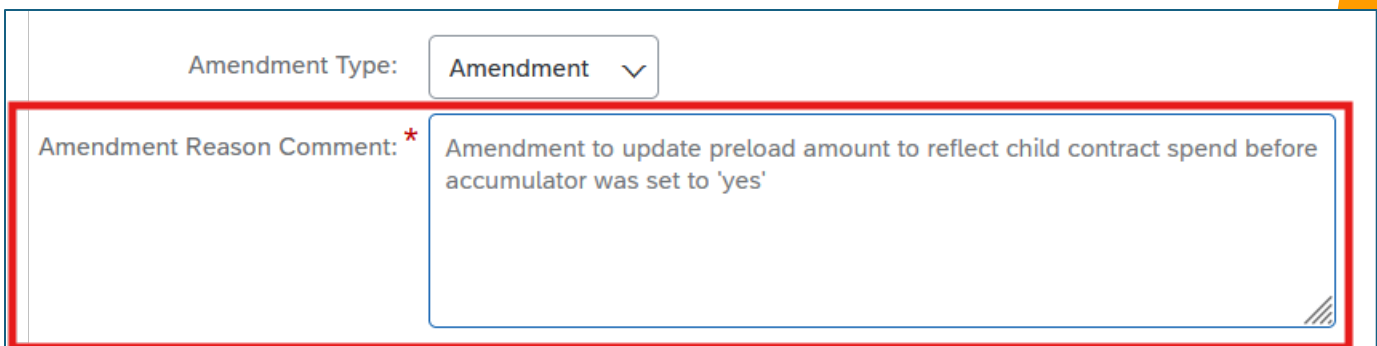
Because we are making changes to the Header details for this contract, select '**Amendment**' for the type of change being made.



A screenshot of a web form. The 'Amendment Type:' dropdown menu is open, showing four options: 'Renewal', 'Amendment', 'Administrative', and 'Termination'. The 'Amendment' option is highlighted with a red rectangular border. To the left of the dropdown, the text 'Amendment Reason Comment: \*' is visible.

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The 'Amendment Reason Comment' field is required. Add a detailed comment explaining the reason for your amendment / change to the preload amount.



A screenshot of a web form. The 'Amendment Type:' dropdown menu is set to 'Amendment'. Below it, the 'Amendment Reason Comment: \*' field is highlighted with a red rectangular border. The text inside the field reads: 'Amendment to update preload amount to reflect child contract spend before accumulator was set to 'yes''. A small icon is visible in the bottom right corner of the text area.

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Click '**OK**' at either the top or bottom of the page.

Amend Contract Test Contract HC 03.04

OK

Cancel

The **Amendment Type** indicates the reason for amending this contract. There are five types of amendments: **Renewal**, **Amendment**, **Administrative**, **Price Update** and [More](#)

❗ If the reason you are amending the Contract is not **Administrative**, the newly created version of the Contract is pushed to Contract Compliance.

Amendment Type:

Amendment

Amendment Reason Comment: \*

Amendment to update preload amount to reflect child contract spend before accumulator was set to 'yes'

OK

Cancel

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You will be returned to the **Contract Workspace Overview** tab where the **Contract Status** has updated to '**Draft Amendment**' and the **Version** shows an updated version in editing status.

Overview

Actions

Contract ID: CW14179

Contract Status: Draft Amendment

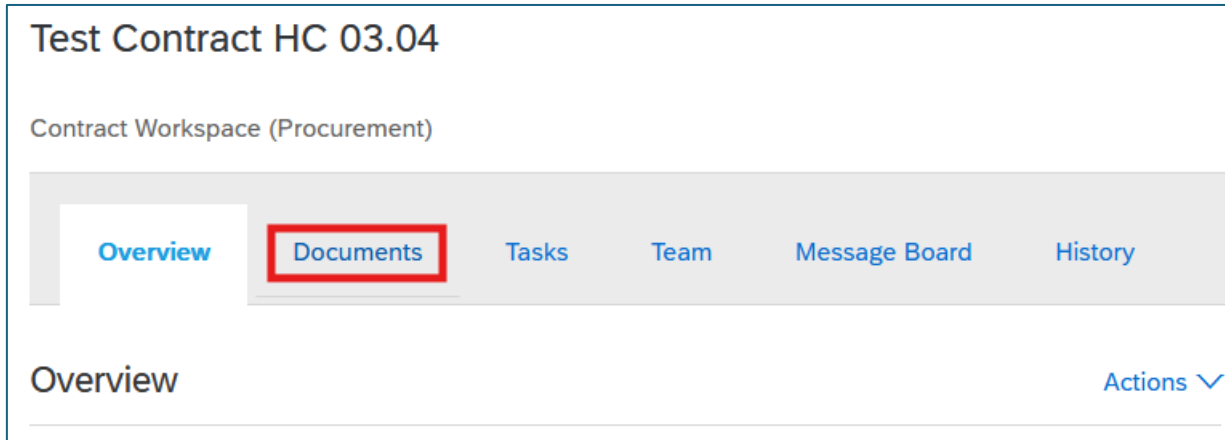
Last Published Date: 03/17/2025 ⓘ

Version: v1 (editing)



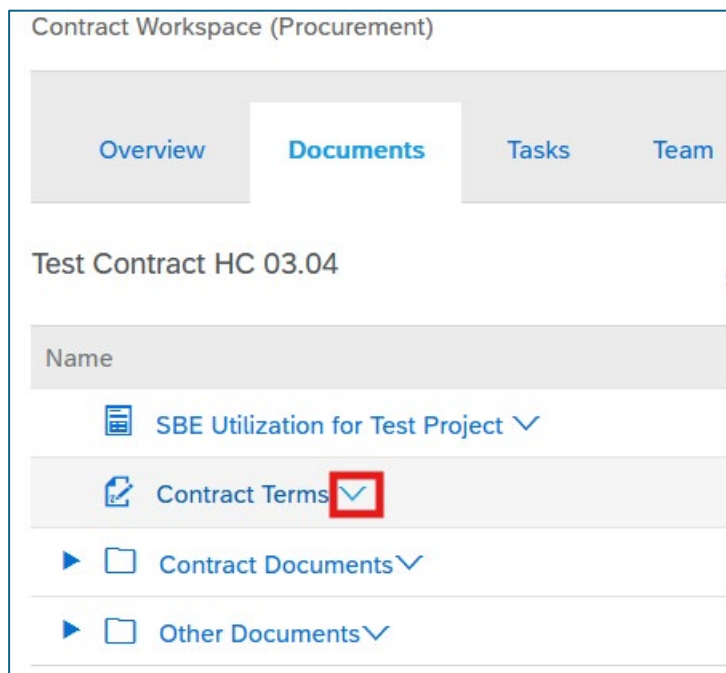
15

Click the 'Documents' tab



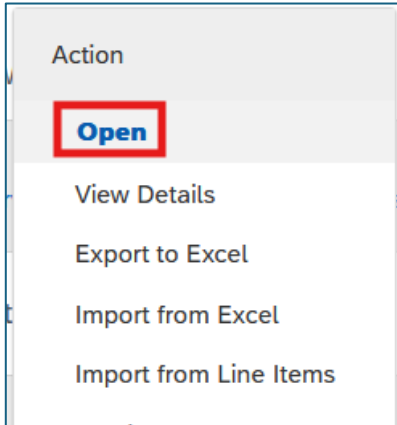
16

Click the 'Contract Terms' dropdown



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From the '**Contract Terms**' dropdown, select '**Open**'



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The '**Preload Amount**' field is located in the '**Limits**' section of the Contract Terms Document. Click '**Limits**' from the wizard menu on the left.

Contract	
CR965-V2: (CW14179) Test Contract HC 03.04	
	Enter general requirements or definitions for the contract.
1 Definitions	Definitions
2 Limits	Physical Location: Related Contract ID:
3 Pricing Terms	

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Scroll down to the '**Preload Amount**' section

#### Preload Amount

Enter a preload amount to preset the spend accumulators for the contract, for example, to reflect prior spending on this contract.

Preload Amount:

USD▼

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For this example, we will say we had a Child Contract/Subagreement for this Parent/Master contract, and that we previously forgot to set up accumulators for the subagreement. We spent \$25,000 on the subagreement which wasn't accumulated to the Master contract. So, in the 'Preload Amount' field, we will enter \$25,000. This will reduce the available value on the master agreement by this amount to account for the previous spend.

#### Preload Amount

Enter a preload amount to preset the spend accumulators for the contract, for example, to reflect prior spending on this contract.

Preload Amount:

25000

USD▼

## 20

Scroll to the top and click 'Next' until you reach the 'Summary' Screen. Or, click 'Summary' directly from the menu on the left.

Contract CR965-V2: (CW14179) Test Prev **Next** Exit

Contract HC 03.04

Define the overall limits for this contract request, and specify how users should Mo

**1** Definitions

**2** Limits

**3** Pricing Terms

**4** Milestones

**5** Access Control

**6** Payment Terms

**7** Appendixes

**8** Summary

**Minimum Commitment**

Minimum Commitment applies to the entire contract. Notifications are sent when the amount spent on the contract does not meet the specified minimum commitment.

Minimum Commitment:  USD

If Amount Spent is below:  0%

Send notification:  0 days before the contract expires

**Maximum Limit**

Maximum Limit applies to the entire contract. Notifications are sent when the remaining amount available on the contract is less than the specified percentage of the maximum limit. Tolerance is the percentage by which you can exceed the maximum limit.

Maximum Limit:  \$500,000.0 USD

Tolerance:  0%

Is Hard Maximum Limit: ☒ Yes ☐ No

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From the Summary screen, review your preload amount and then click 'Save' at the top or bottom of the screen.

CR965-V2: (CW14179) Test Contract HC 03.04 Prev **Save**

Review and edit the contract request. When you are finished, submit the request for approval

**Summary** Pricing Terms Milestones

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If you need to add supporting documentation, you may do so from the 'Documents' tab before publishing your changes. Open the '**Contract Documents**' dropdown.

The screenshot shows a software interface with a top navigation bar containing tabs: Overview, Documents (selected), Tasks, Team, Message Board, and History. Below the navigation bar, the header reads 'Test Contract HC 03.04' with links for 'Show Details' and 'Actions'. A table lists documents with columns 'Name', 'Owner', and 'Status'. The 'Contract Documents' row is highlighted with a red box.

Name	Owner	Status
SBE Utilization for Test Project ✓	BUYER04	Published
Contract Terms ✓	Project Owner	Draft
Contract Documents ✓	Project Owner	
Other Documents ✓	Project Owner	

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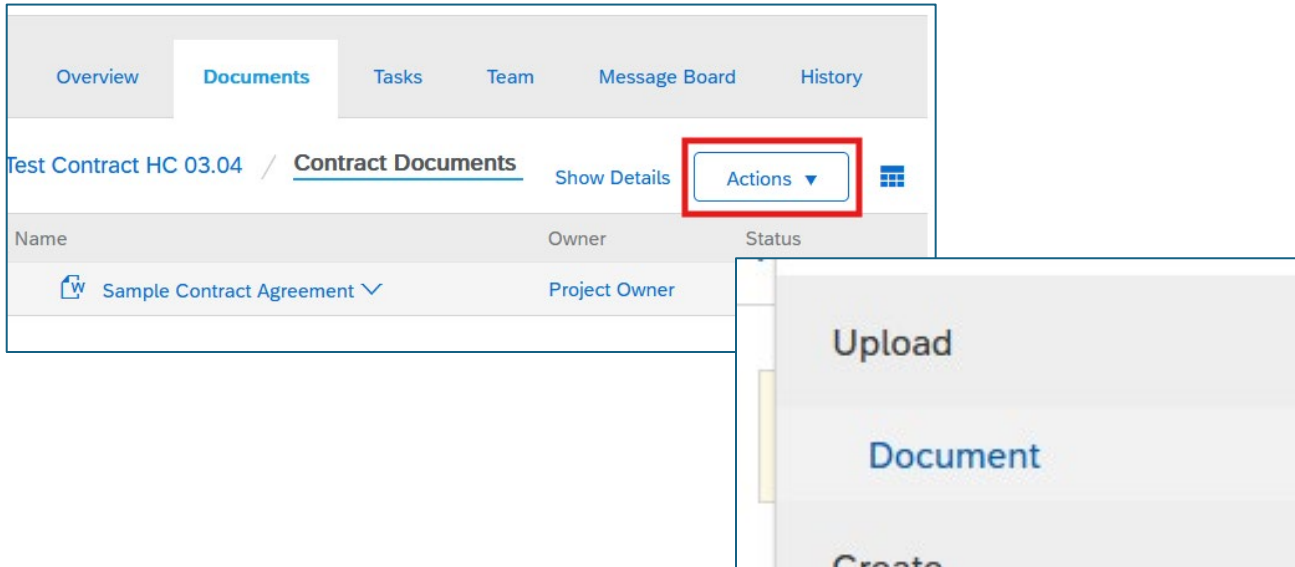
Click '**Open**' from the Action menu

The screenshot shows a dropdown menu titled 'Action'. The 'Open' option is highlighted with a red box. Other options in the menu include View Details, Search, Edit Attributes, Move, Add to Quick Links, Lock Documents, and Unlock Documents.

- Action
  - Open
  - View Details
  - Search
  - Edit Attributes
  - Move
  - Add to Quick Links
  - Lock Documents
  - Unlock Documents

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Open the '**Actions**' menu, then select '**Document**' under the '**Upload**' option.



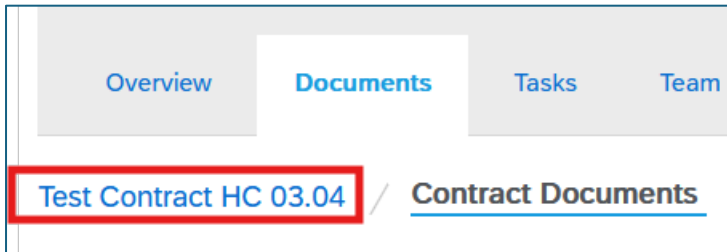
25

Browse for your attachments in your local files, or drag the document into the box, add an optional description and then click 'Create'

A screenshot of the 'Create Document' form. At the top, the title 'Create Document' is on the left, and a blue 'Create' button is on the right, highlighted with a red rectangle. Below the title, the instruction 'Upload the file and fill in additional information.' is displayed. The breadcrumb path is 'Test Contract HC 03.04 / Contract Documents / Untitled Document'. The 'Upload file:' section has a 'Browse...' button and the text 'No file selected.', both highlighted with a red rectangle. Below this is a dashed box with the text 'Or drop file here', also highlighted with a red rectangle. The 'Description:' section has a rich text editor with various formatting icons (bold, italic, underline, link, unlink, bulleted list, numbered list, indent, outdent, size, font, color, background color, image) and a text area below it. A red arrow points from the 'Create' button to the 'Browse...' button.

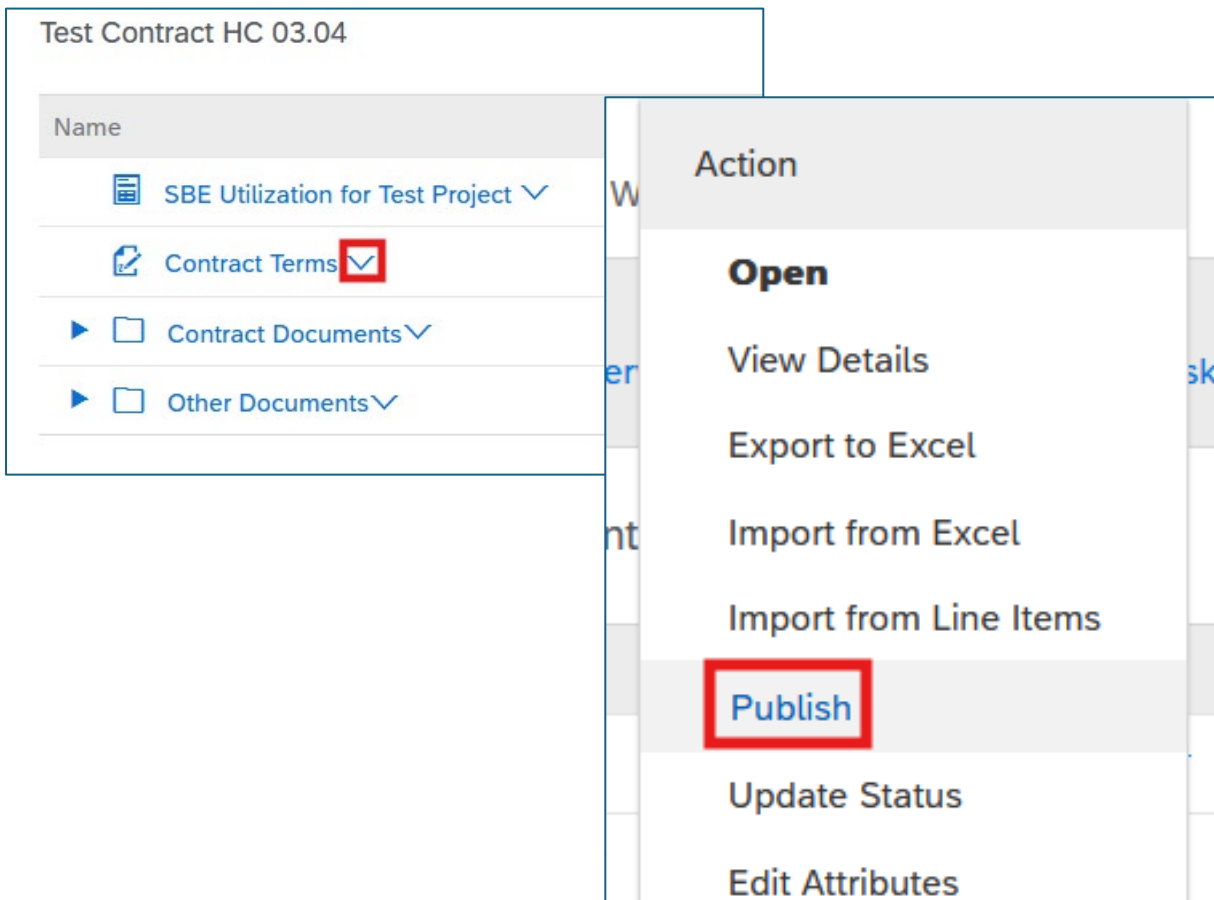
24

Click on your Contract Name to return to the Documents for the Agreement.



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Click the dropdown for '**Contract Terms**', then click '**Publish**' from the dropdown menu.



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Review the changes you made during the amendment. Reminder: the **'Preload Amount'** is found in the **'Limits'** section. When you are ready, click **'Submit'** at the top or bottom of the page.

The screenshot displays a web interface for editing a contract. At the top, the title bar reads "Contract" followed by "CR965-V2: (CW14179) Test Contract HC 03.04". To the right of the title are three buttons: "Prev", "Submit" (highlighted with a red box), and "Exit". Below the title bar is a navigation sidebar on the left with eight items: "1 Definitions", "2 Limits" (highlighted with a red box), "3 Pricing Terms", "4 Milestones", "5 Access Control", "6 Payment Terms", "7 Appendixes", and "8 Summary". The main content area has a header that says "Review and edit the contract request. When you are finished, submit the request for approval, or exit and save the [More](#)". Below this header is a tabbed interface with four tabs: "Summary" (active), "Pricing Terms", "Milestones", and "Approval Flow". Under the "Definitions" section, there are several fields: "Physical Location:" with an empty text box, "Related Contract ID:" with a dropdown menu set to "No", "On Behalf Of:" with a dropdown menu set to "BUYER04", "Contract Type:" set to "Commodity Level", and "Is Blanket Purchase Order:" set to "No". At the bottom, it says "Hierarchical Type: Master Agreement".

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Your amendment will be published after any required approvals.



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Once your amendment has published, your **'Contract Terms'** document will now show your **'Preload Amount'**.

Preload Amount
Enter a preload amount to preset the spend accumulators for the contract, for example, to reflect prior spending on this contract.
Preload Amount: \$25,000.00 USD

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The **'Amount Available'** and **'Amount Percent Left'** fields have updated to include the previous spend you added into the **'Preload Amount'**.

Amount Available:	\$459,600.00 USD
Currency:	US Dollar
Amount Spent:	\$40,400.00 USD
Amount Percent Left:	91.92%
Balance:	\$0.00 USD