LAUSD UNIFIED

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

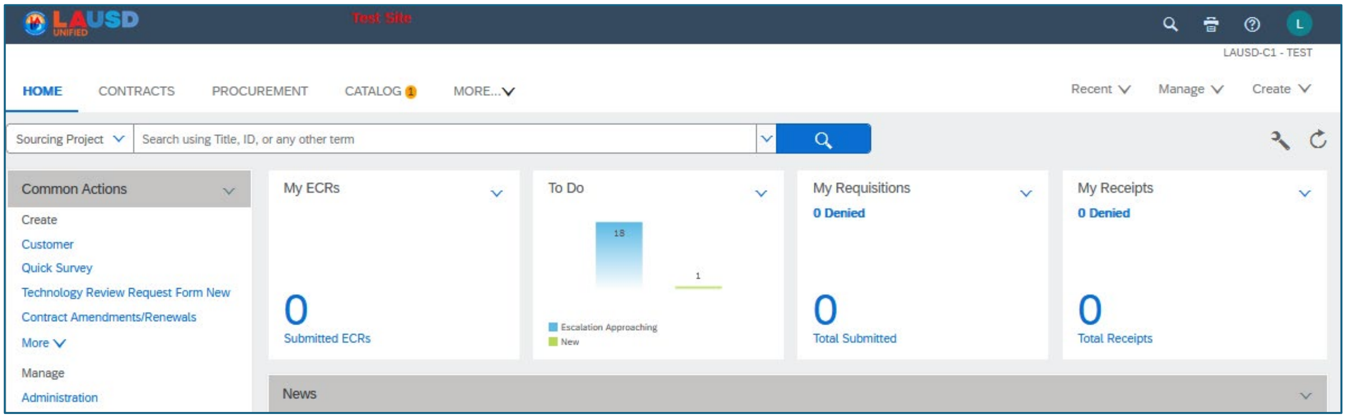
To access Ariba P2P Core, log in to your ESS (https://ess.lausd.net/) using your Single Sign On (SSO).

2

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

3

You will be directed to the P2P Core home page.



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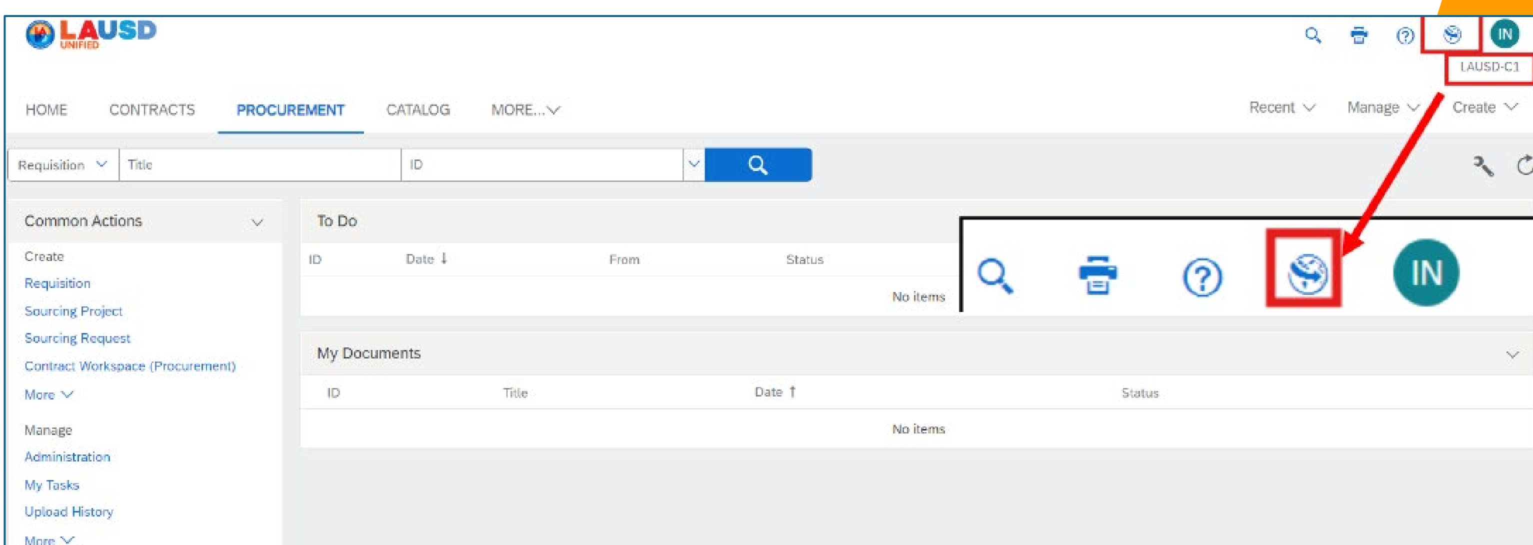
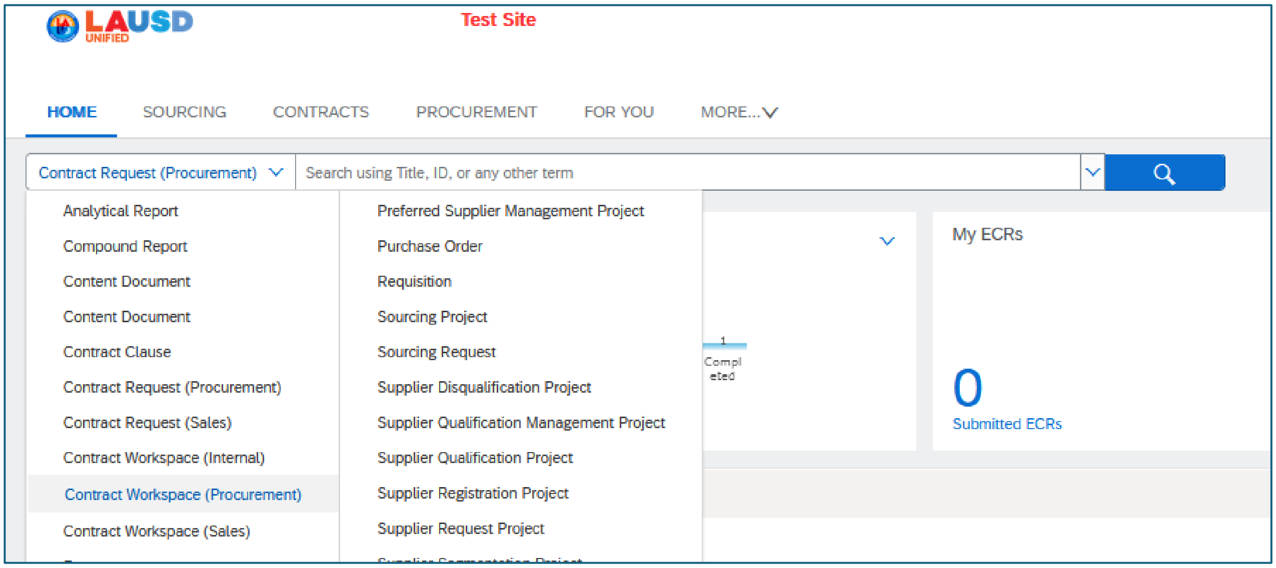
Ensure that you are in the **Parent Realm**. To change this, click on the globe icon and select ‘LAUSD’ from the dropdown menu.



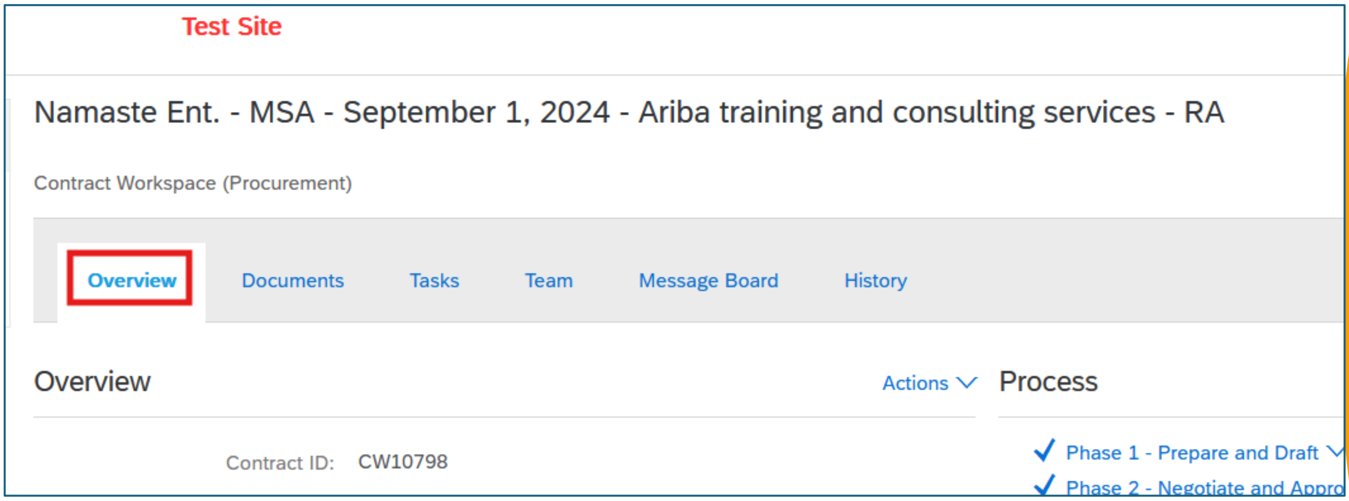
5

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)**'.



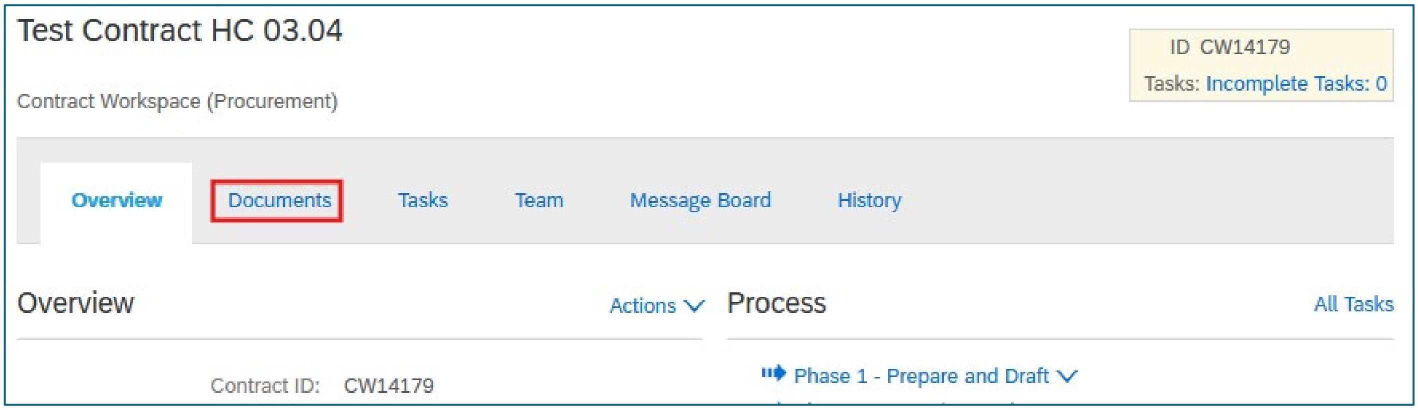
6

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



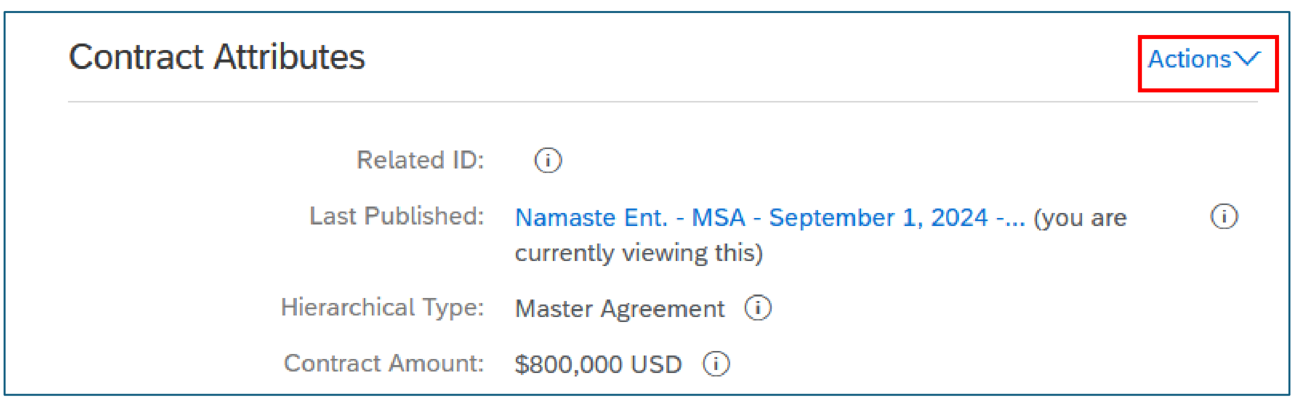
7

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



8

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



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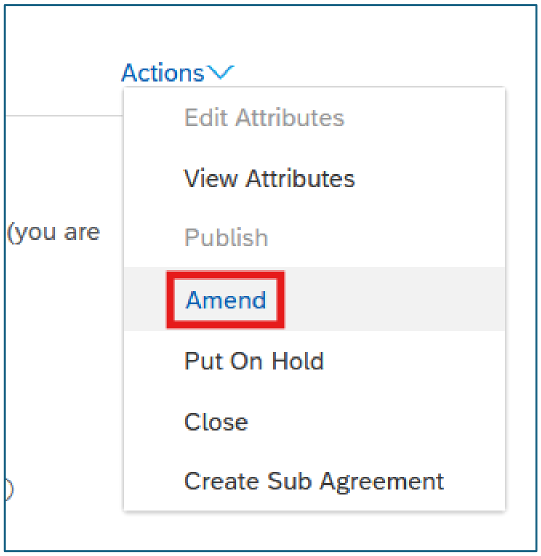
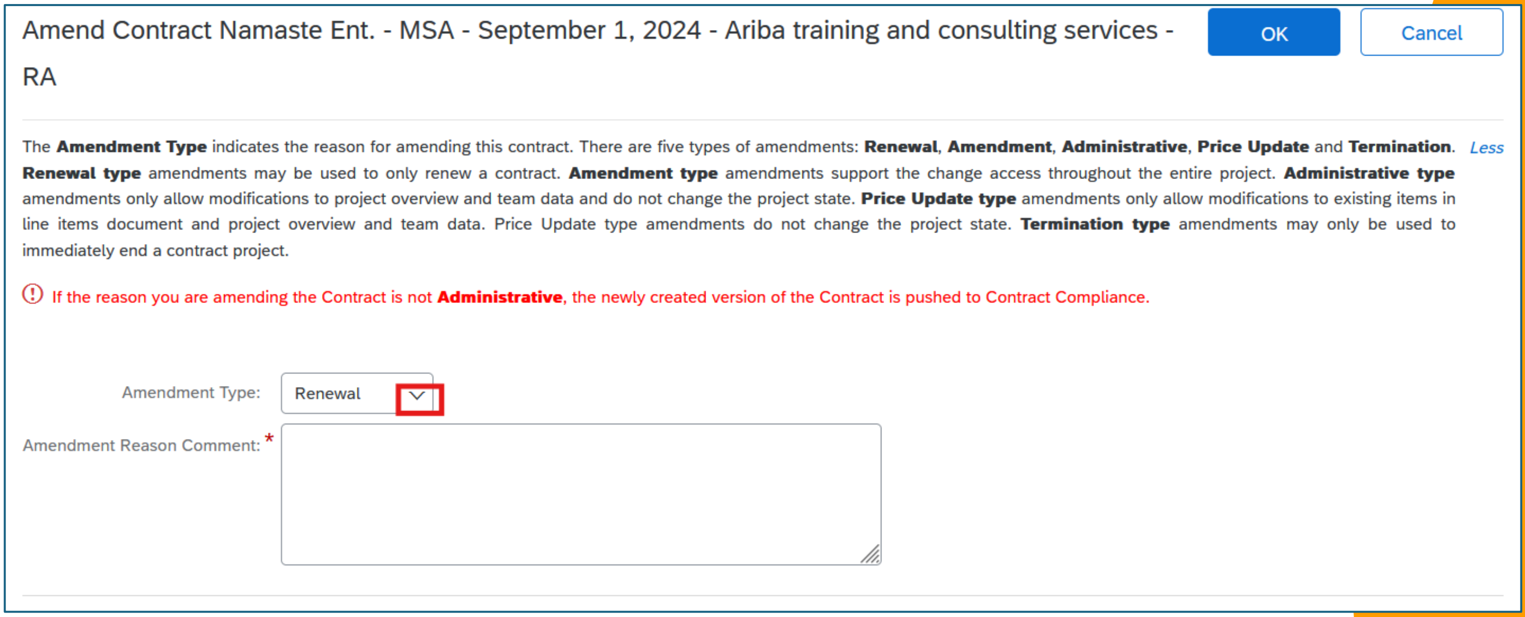
From the '**Action**' dropdown menu, select '**Amend**'.



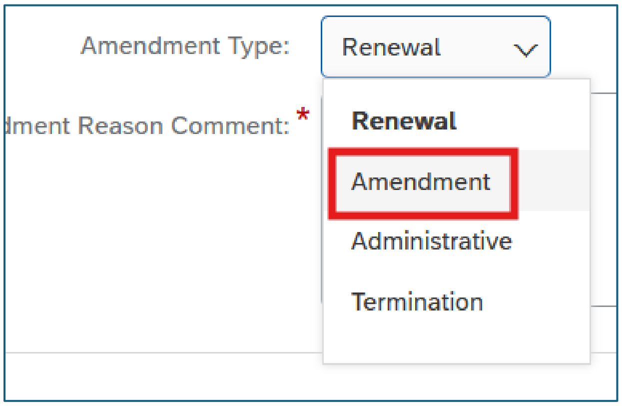
10

First, open the dropdown for amendment type.



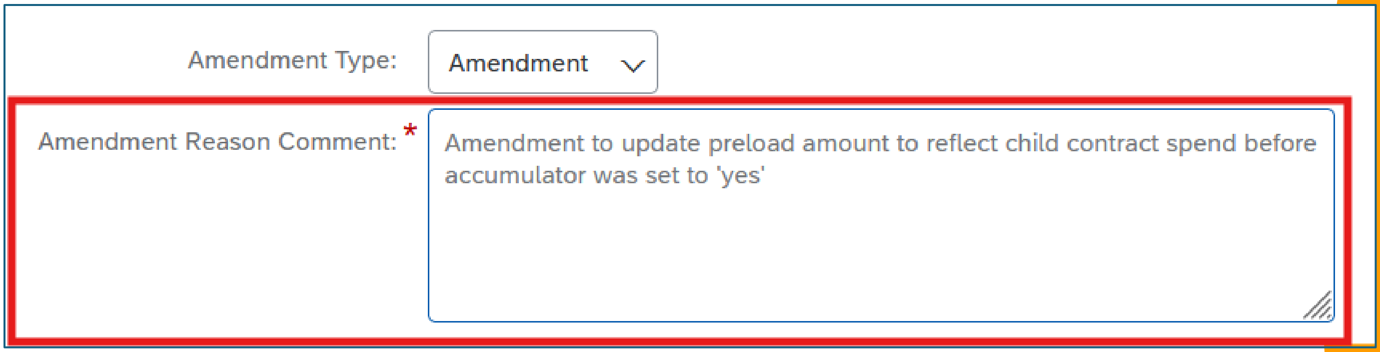
11

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



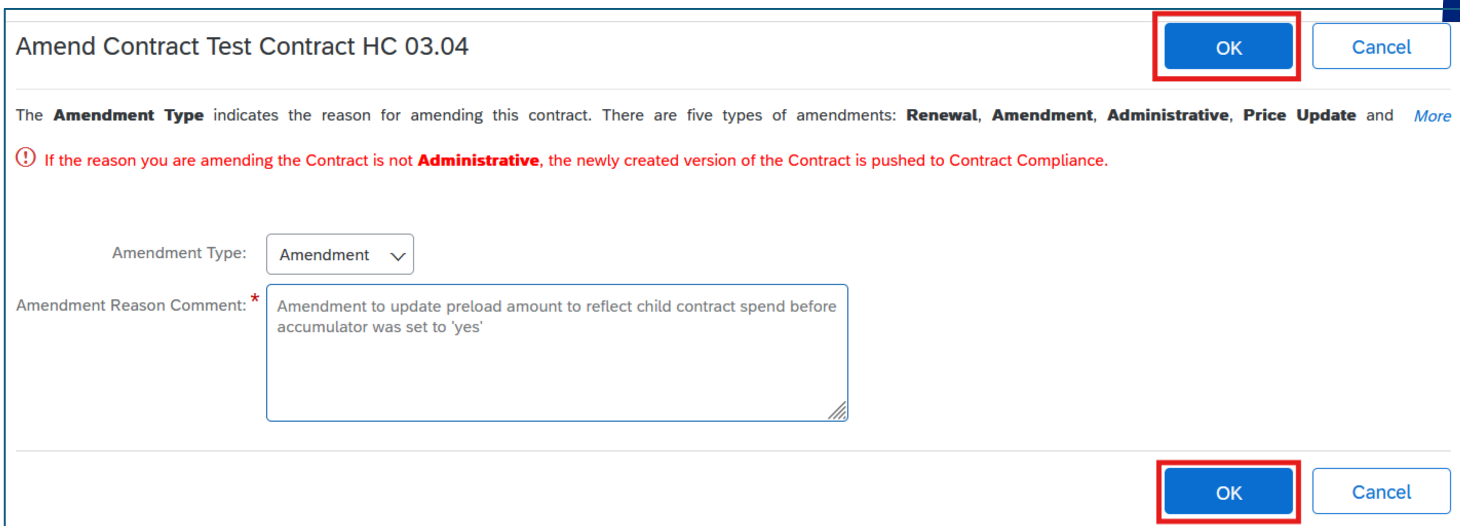
12

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



13

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



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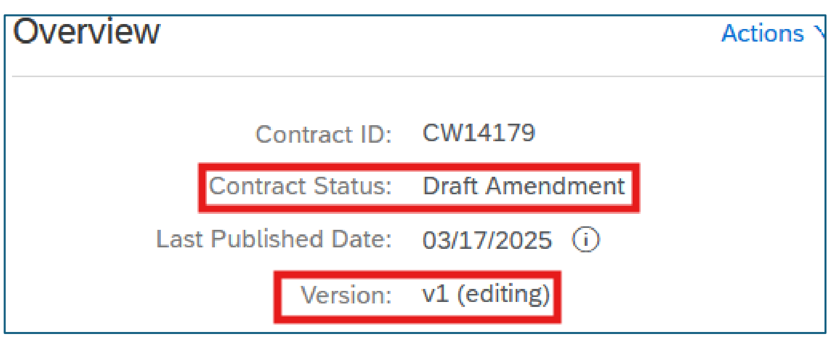
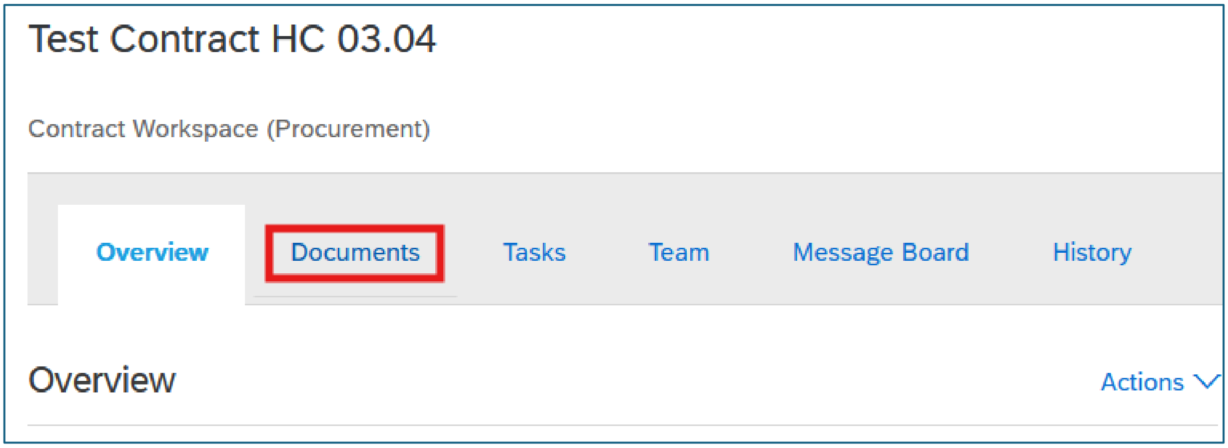
You will be returned to the **Contract Workspace** Overview tab where the **Contract Status** has updated to ‘**Draft Amendment**’ and the **Version** shows an updated version in editing status.



15

Click the 'Documents' tab



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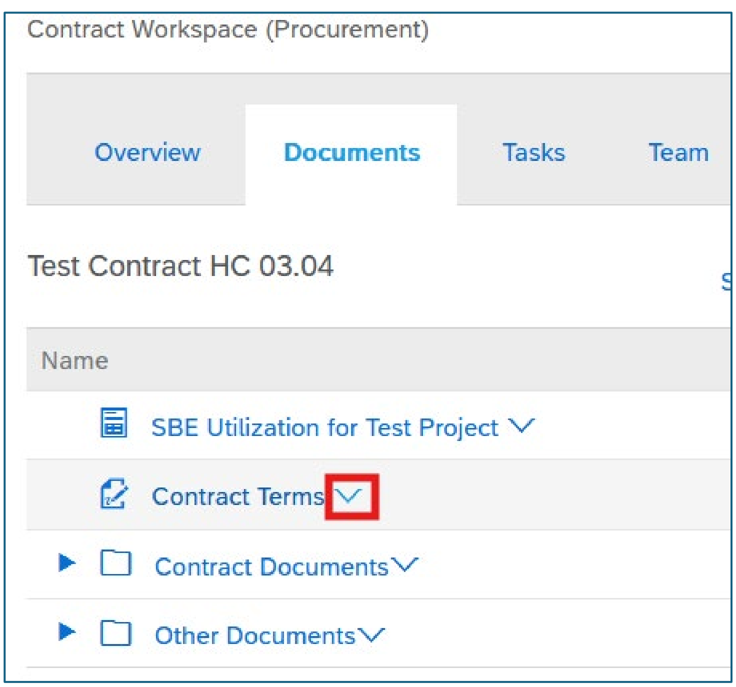
Click the 'Contract Terms' dropdown



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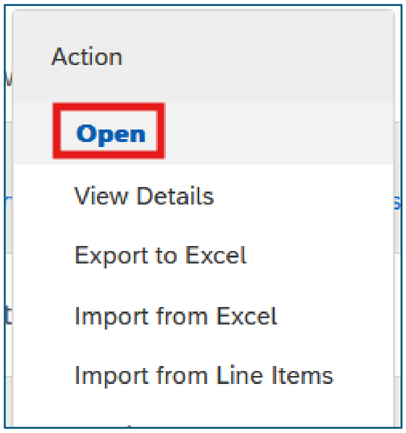
From the ‘**Contract Terms**’ dropdown, select ‘**Open**’



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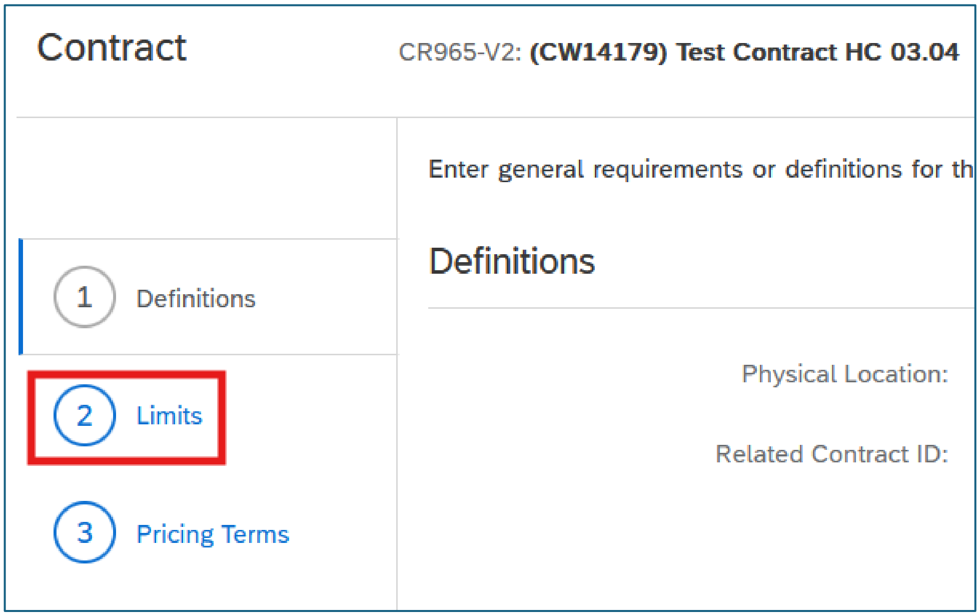
The ‘**Preload Amount**’ field is located in the ‘**Limits**’ section of the Contract Terms Document. Click ‘**Limits**’ from the wizard menu on the left.



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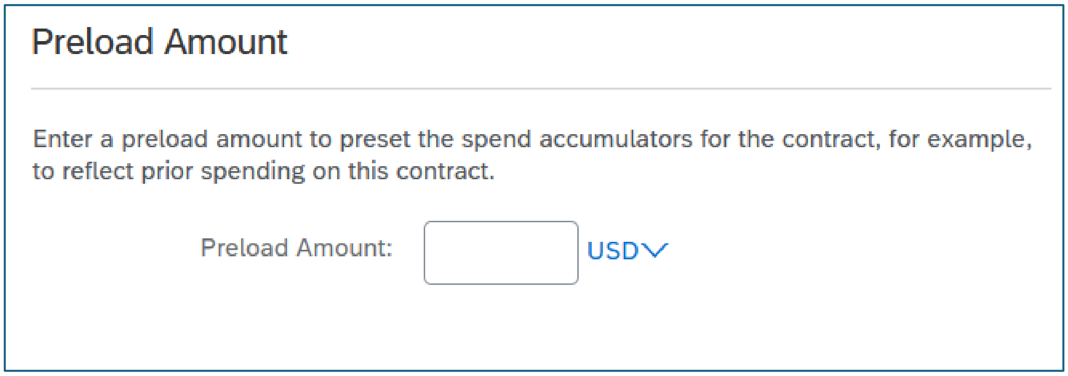
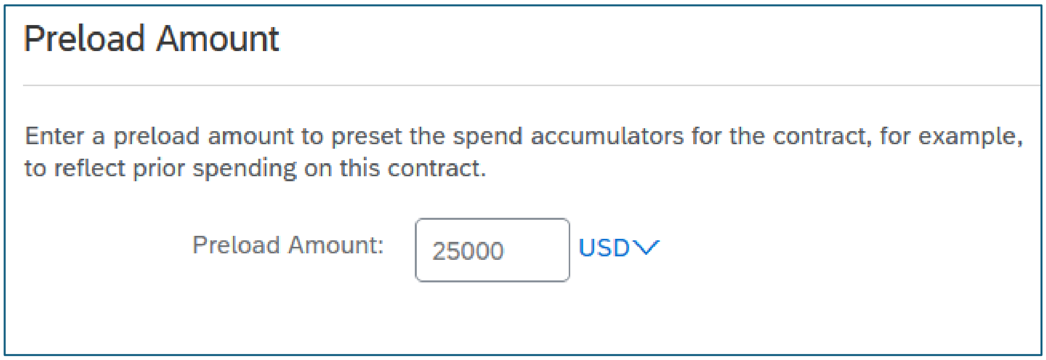
Scroll down to the '**Preload Amount**' section



20

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.



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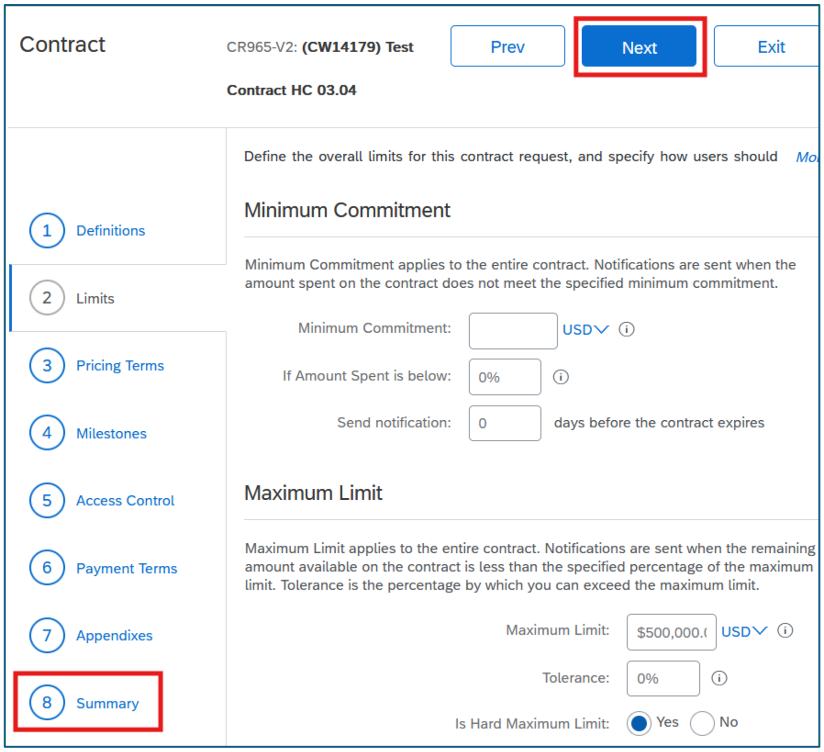
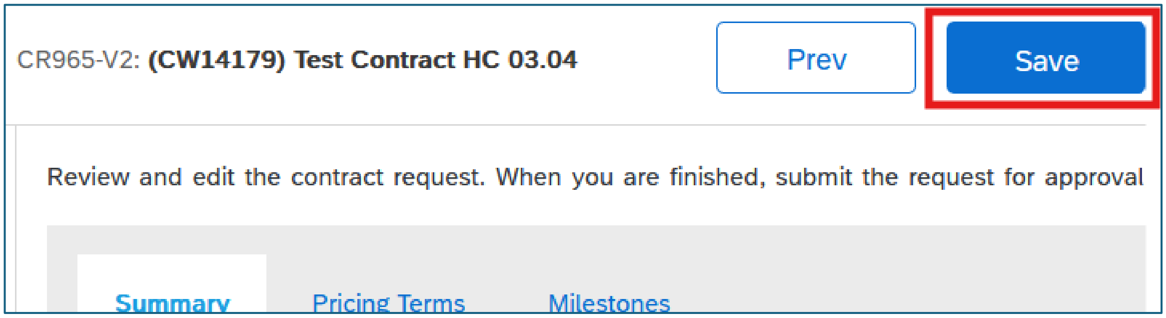
Scroll to the top and click ‘Next’ until you reach the ‘Summary’ Screen. Or, click ‘Summary’ directly from the menu on the left.



21

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



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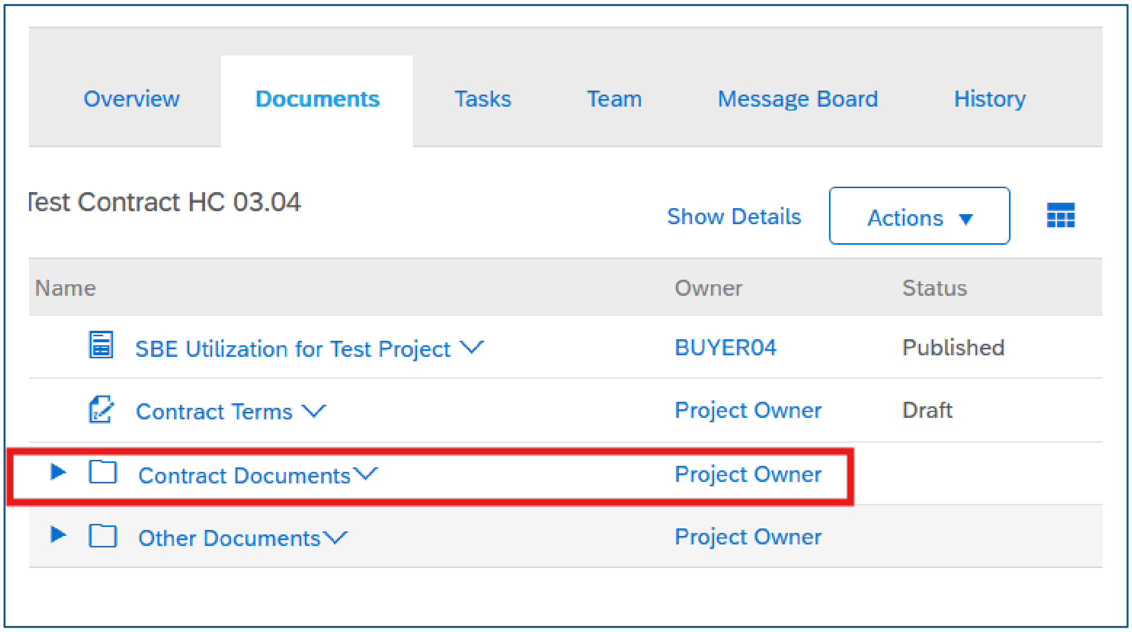
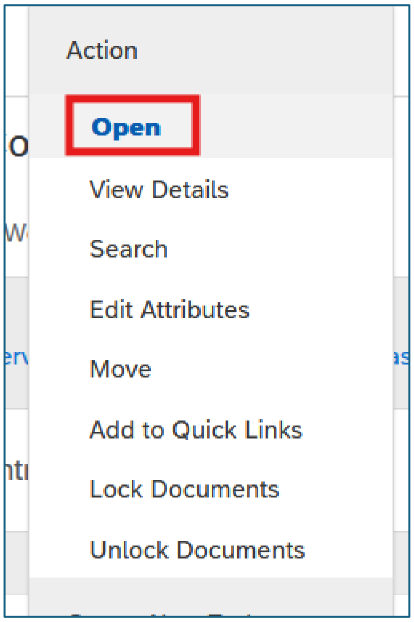
If you need to add supporting documentation, you may do so from the 'Documents' tab before publishing your changes. Open the '**Contract Documents**' dropdown.



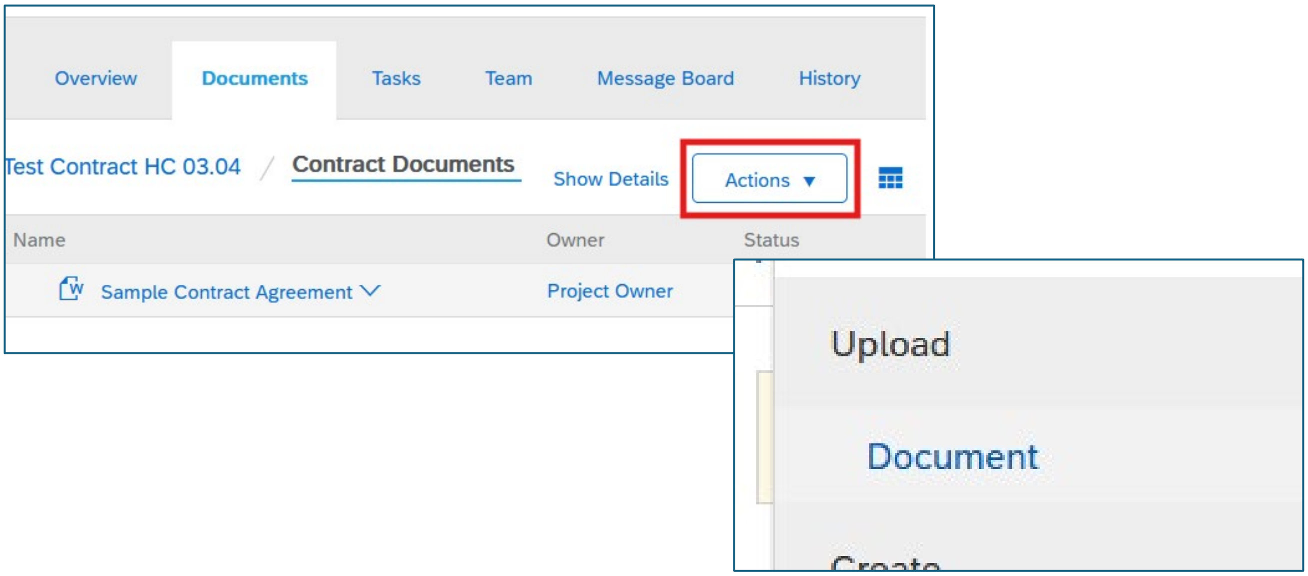
23

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



24

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



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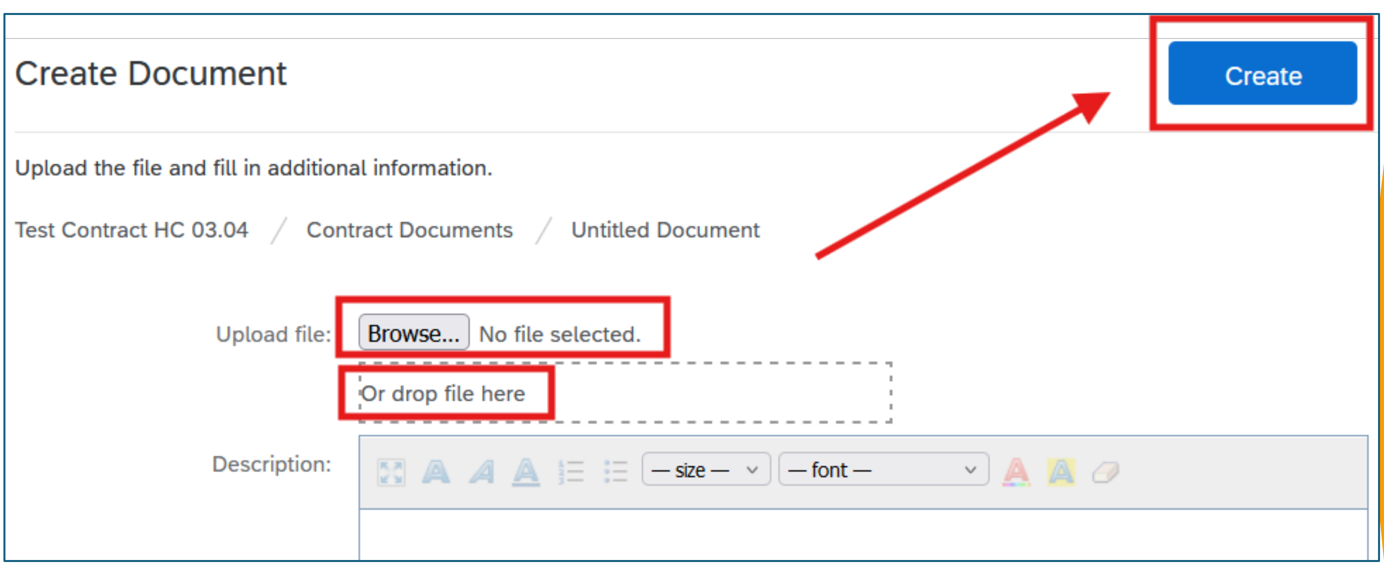
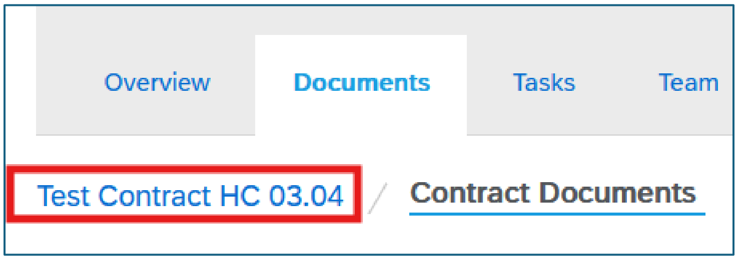
Browse for your attachments in your local files, or drag the document into the box, add an optional description and then click 'Create'



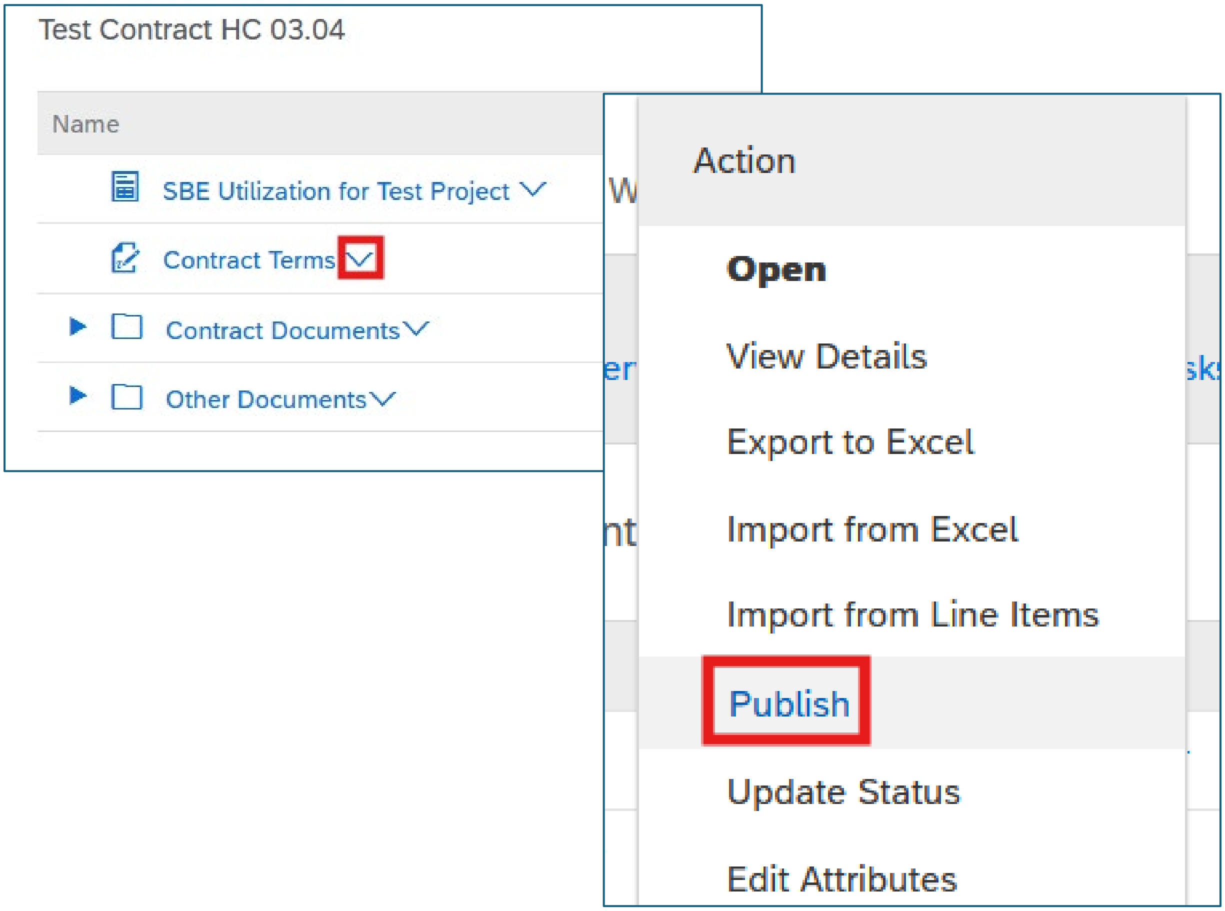
24

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



25

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



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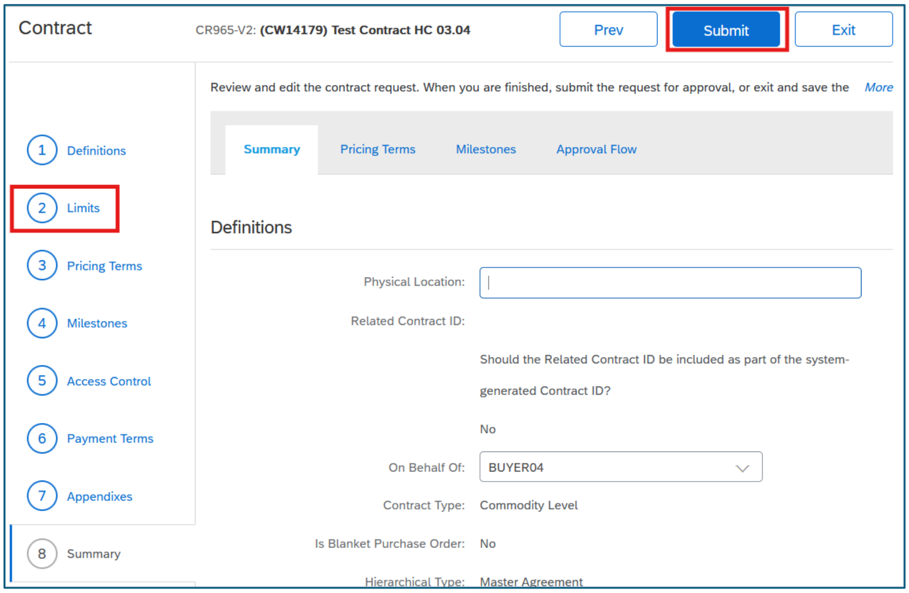
Review the changes you made during the amendment. Reminder: the '**Preload Amount**' is found in the '**Limits**' section. When you are ready, click '**Submit**' at the top or bottom of the page.



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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%