

Using the Contract Summary Index

There are three easy ways to search and order basic school supplies and equipment that have been uploaded into FMS iProcurement. Use the Contract Summary Index on the Division of Procurement's website to do the following:

- Locate a specific *external* (outside supplier) item using an Excel spreadsheet.
- Locate all items under a specific contract (*internal and external*) using the Search Term column.
- Locate a specific *internal* warehouse item using an Excel spreadsheet.

Note: Staff who do not have access to iProcurement may use the Contract Summary Index to create a list of items to order.

Best Practices

Follow these best practices to avoid delays due to workflow errors in the approval process:

- Items on the Excel spreadsheets may include both warehouse items and external items. However, *do not* combine warehouse and external items under *one* requisition, even though they are under the same contract. *They must be ordered under separate requisitions* because of different workflow paths.
- Do not combine more than one category per order for external items. The exception is when ordering through the Office Depot Store.
- Only use the Main General Store to search for and order *external* items.
- Only use the DMM Warehouse Store to search for and order *internal* warehouse items.
- *Do not* add a non-catalog request (NCR) item to the same cart. NCR items must be ordered separately.

Step-by-Step Instructions to Place an Order

Follow the step-by-step instructions in this section to do the following:

- [Set up your browser windows for ordering.](#)
- [Order a specific external item.](#)
- [Locate all external items under a specific bid/contract.](#)
- [Locate warehouse items under a specific bid.](#)

Set Up Your Browser Windows for Ordering

You will need two browser windows open—one opened to the iProcurement shopping page and the second browser opened to the Contract Summary Index.

1. Navigate to the iProcurement shopping page in FMS.



2. Open another browser and navigate to the Procurement Unit Contract Summary Index at the following address:

<http://www.montgomeryschoolsmd.org/departments/procurement/contracts.aspx>

Order a Specific External Item

In the step-by-step instructions below, the Art Equipment contract is used as an example.

1. In the **Contract Summary Description** column, locate the bid/contract description for the item needed.

Contract Summary Description:	Go To:	Search Term:
Art Equipment	Main Store	ARTEQ

The Art Equipment contract contains both warehouse items and external items, as indicated in the **Go To** and **Search Term** columns.

2. Note the store in the **Go To** column, then click the bid/contract description to open the Art Equipment Excel spreadsheet.

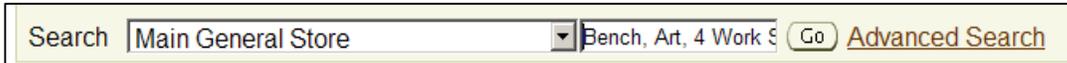
Division of Procurement Department of Materials Management				iProcurement Catalog: DMM Warehouse OR Main General		
MONTGOMERY COUNTY PUBLIC SCHOOLS Rockville, Maryland				Keyword Search: WHSE Item No. OR ARTEQ		
Contract Summary: 4081 Art Equipment Contract Term: 10/15/2012 through 10/14/2013				Buyer: TBD 301-279-3555		
WHSE No.	Supplier	Category	Description	UOM	Price	Notes
	Midwest Technology Products	050.00	Bench, Art, 4 Work Station. All-Welded Heavy Gauge Steel Base With 12 Locker Openings; 6 per side. Includes 2-1/4" thick solid maple top. BRAND: Midwest MODEL: 557167 MW12A	Each	1,163.75	
0833720	DMM Warehouse	050.00	Easel, Elementary, 52", Custom, Glover	Each	322.50	

The Art Equipment spreadsheet lists *all* the items under the specific contract summary. If the item is an *internal* purchase from the warehouse, the warehouse number is indicated in the **WHSE NO.** column. In the example above, the first item is an *external* purchase through Midwest Technology Products, and the second item is a *warehouse* item. *Do not* combine internal and external items under one requisition, even though they are under the same contract. *They must be ordered separately.*

3. Click in the **Description** field of the *external* item, and copy the item description.
4. Navigate to the iProcurement shopping page, and select the Main General Store, which is indicated in the **Go To** column noted in step 2.

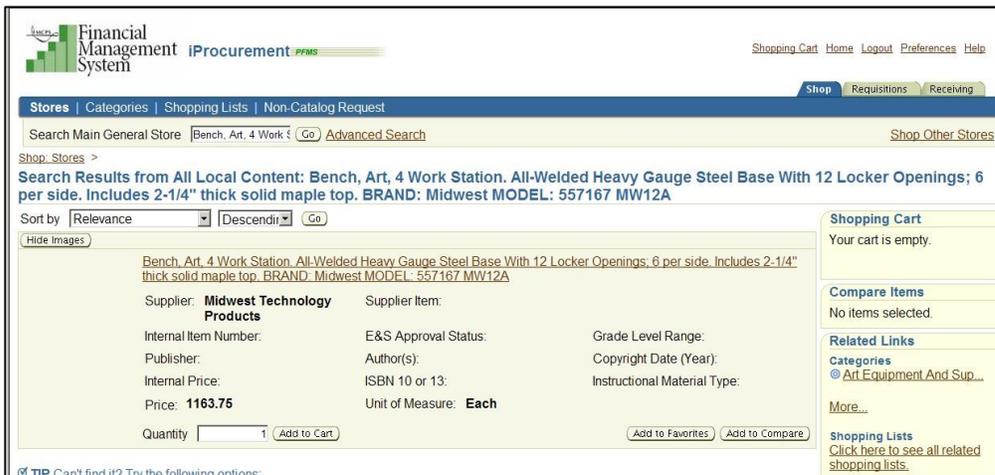


5. Click in the **Search** field, and paste the description into the field.



6. Click the **Go** button.

iProcurement will refresh to display in the results region of the screen the exact item you specified.



7. Change the quantity, if applicable, and click the **Add to Cart** button. Continue the copy and paste process if more *external* items are needed under the contract summary.
8. After adding all needed items under the contract to your Shopping Cart, proceed to **View Cart and Checkout** to start the checkout process.

Locate all External Items Under a Specific Bid/Contract

1. In the **Contract Summary Description** column, locate the bid/contract description for the item needed.

Contract Summary Description:	Go To:	Search Term:
Art Equipment	Main Store	ARTEQ

2. In the **Search Term** column of the bid/contract, copy the search term indicated and note the store in the **Go To** column.

Find what you need...	Find on FMS...	Then enter...
Contract Summary Description:	Go To:	Search Term:
Art Equipment	Main Store	ARTEQ

3. Navigate to the iProcurement shopping page, and select the Main General Store, which is indicated in the **Go To** column noted in step 2.

The screenshot shows the top navigation bar of the iProcurement FMS. The search field contains the text 'Main General Store' and is highlighted with a red box. Other elements include the 'Financial Management System' logo, 'iProcurement FMS' text, and navigation links like 'Shopping Cart', 'Home', 'Logout', 'Preferences', and 'Help'. Below the search field are buttons for 'Shop', 'Requisitions', and 'Receiving'.

4. Click in the **Search** field, and paste the search term.

A close-up of the search field from the previous screenshot. The text 'Main General Store' is in the search box, and 'ARTEQ' is in the dropdown menu. A 'Go' button and an 'Advanced Search' link are visible to the right.

5. Click the **Go** button.
6. iProcurement will refresh to display in the results region of the screen *all* of the *external* items in the contract summary available for ordering.

The screenshot displays search results for 'ARTEQ'. At the top, it says 'Search Results from All Local Content: ARTEQ'. There are sorting options: 'Sort by Relevance', 'Descending', and a 'Go' button. Below this are two items:

- Item 1:** Replacement Blades For Mat Cutter, Item 30357 Brand: Logan 270 Model: 17111-1271 ARTEQ. Supplier: Dick Blick Company. Price: 2.17. Unit of Measure: Package.
- Item 2:** Pug Mill, 15" X 24" X 54", 115V, 11 Amp, 3/4 Ph Motor, 7 X 7 Hopper Opening, 4 1/4" Extrusion Diameter, 1/4 Hp Vacuum Pump & Wheel Stand And Safety Shut Off Switch, Brand: Bluebird Model: BL800 ARTEQ. Supplier: Sheffield Pottery Inc. Price: 4829. Unit of Measure: Each.

7. If needed, use the **Sort By** field to rearrange the listing by description and in either ascending or descending order.

A close-up of the sorting options from the search results page. The 'Sort by' dropdown is set to 'Description', and the order dropdown is set to 'Ascending'. A 'Go' button is next to it.

8. After choosing the sort order, click the **Go** button.
9. Locate the item needed. Change the quantity, if applicable, and click the **Add to Cart** button. Continue the process if other *external* art equipment items (in this example) are needed.

Replacement Blades For Mat Cutter, Item 30357 Brand: Logan 270 Model: 17111-1271 ARTEQ

Supplier: **Dick Blick Company** Supplier Item:

Internal Item Number: E&S Approval Status: Grade Level Range:

Publisher: Author(s): Copyright Date (Year):

Internal Price: ISBN 10 or 13: Instructional Material Type:

Price: **2.17** Unit of Measure: **Package**

Quantity

- After adding all needed items under the contract to your Shopping Cart, proceed to **View Cart and Checkout** to start the checkout process.

NOTE: The search term can be found in most of the item descriptions for the contract summaries listed. However, not all warehouse items or bid/contract items have this feature.

Locate Warehouse Items Under a Specific Bid

Only use the DMM Warehouse Store when searching for or ordering warehouse items. Also, *do not* combine internal and external items under one requisition, even though they are under the same contract. *They must be ordered separately.*

- In the **Contract Summary Description** column, locate the contract description containing the internal warehouse item needed. For contracts that have both internal and external items, the DMM Store also will be listed in the **Go To** column.

Contract Summary Description:	Go To:	Search Term:
Art Supplies	DMM Store	Whse # or Description
	Main Store	Description

- Click the bid/contract description to open the Art Supplies Excel spreadsheet, in this example.

Procurement Unit			
Department of Materials Management			
MONTGOMERY COUNTY PUBLIC SCHOOLS			
Rockville, Maryland			
Contract Summary: Art Tools and Supplies			
Contract Term: 03/16/2016 through 03/15/2017			
Warehouse No.	Supplier	Category	Description
0504017	DMM Warehouse	050.00	Burlap, White, 48" Wide, 5 Yards/ Pkg, James Thompson, 63202-1036-5
0504023	DMM Warehouse	050.00	Burlap, Green, 48" Wide, 5 Yards/ Pkg, James Thompson, 63202-7336-5
0504026	DMM Warehouse	050.00	Burlap, Red, 48" Wide, 5 Yards/Pkg, James Thompson, 63202-3236-5

The Art Supplies spreadsheet opens lists *all* the items under the contract summary. If the item is an *internal* purchase from the warehouse, the warehouse number is indicated in the **WHSE NO.** column.

- Locate the warehouse item needed, and copy the number in the **Warehouse No.** field.
- Navigate to iProcurement, click the **Shop** tab, and select **DMM Warehouse**.

5. In the **Search** field, do one of the following:

- Paste the warehouse number.

- Copy and paste the warehouse description.

6. Click the **Go** button.

iProcurement will refresh to display in the results region of the screen the exact item you specified, whether using the warehouse description or number, *provided* the search is performed under the DMM Warehouse Store.

- 7. Change the quantity, if applicable, and click the **Add to Cart** button. Repeat the process if other *warehouse* items are needed. You *can* combine categories for *warehouse* items, so you may order under other contracts. However, *do not* add any *external* items to the order.
- 8. After adding all needed *warehouse* items to your Shopping Cart, proceed to **View Cart and Checkout** to start the checkout process.

NOTE: If the account manager has approved a warehouse order and a change order is needed, *contact the warehouse*. *Do not* make a change or cancel the warehouse order. iProcurement appears to let you make a change after approval, but it is *not* reflected on the warehouse side.