



# Thresholds & Notifications

All thresholds and notifications are optional features on Contracts.

**Navigation:** Supplier Contracts > Create Contracts and Documents > Contract Entry  
or Procurement Contracts > Add/Update Contracts  
(either Navigation will work)

Click the Find an Existing Value Tab

Enter or Search for the Contract Id

Click Search



Notifications can be tied to the Approval Due Date.

To use this, enter the Approval Due Date on the Contract.

Click the [Thresholds & Notifications](#) hyperlink

Contract Entry

Contract

SetID STATE  
Contract ID 18DOC76661PSA01  
\*Status Open  
Administrator/Buyer  
State Identified Contract Type PSC Competitive

Contract Version  
Version 1  
Status Current  
Approval Due Date  
Add a Document

Header

\*Contract Style Purchase Order  
Process Option Purchase Order  
\*Supplier 060836524F-001  
\*Supplier ID 0000011046 CONTINUUM OF CARE INC  
\*Begin Date 02/01/2018  
Expire Date 02/01/2020  
Renewal Date  
Currency USD CRRNT  
Primary Contact  
Supplier Contract Ref 0000076661  
Description DOCM1 0000076661  
Master Contract ID  
Tax Exempt ID  
 Tax Exempt

Add Comments  
Contract Activities  
Primary Contact Info  
Contract Header Agreement  
Contract Releases  
Custom Fields

Activity Log  
Document Status  
Thresholds & Notifications

Amount Summary

Maximum Amount	100,000.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Non-PO PCard Transactions	0.00	
Total Released Amount	0.00	
Remaining Amount	100,000.00	
Remaining Percent	100.00	

Order Contract Options

Allow Multicurrency PO  
 Allow Open Item Reference  
 Must Use Contract Rate Date  
 Corporate Contract  
 Adjust Supplier Pricing First  
 Auto Default  
 Lock Chartfields  
 Price Can Be Changed on Order  
Rate Date 01/19/2018

PO Defaults OPM Reporting Add Open Item Price Adjustments Price Adjustment Template

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines

Personalize | Find | View All | First 1 of 1 Last

Line	Item	Description	UOM	Category	Include for Release	Status
1		Clinical Services	EA	85000000	<input checked="" type="checkbox"/>	Active

View Category Hierarchy Category Search

Contract Categories

Save Return to Search Notify Refresh Add Update/Display Correct History

If a notification will be sent out, check the appropriate checkbox at the top of the page for the type of notification to be sent.

Click Expand All

Thresholds & Notifications

Send Date/Amount Notification     Send Threshold Notification

Expand All    Collapse All

▶ Date Notification

▶ Maximum Amount Notification

▶ Spend Threshold Notification

▼ Notification Assignments    Personalize | Find | View All | [Print] | [Grid]    First 1 of 1 Last

Notification Type	User ID	User Description	Email Address
1			

▼ Amount Summary

Maximum Amount	100,000.00	USD
Total Line Released Amount	0.00	
Total Category Released Amount	0.00	
Open Item Released Amount	0.00	
<hr/>		
Remaining Amount	100,000.00	
Remaining Percent	100.00	

OK    Cancel

All sections will display.

Thresholds & Notifications Help

Send Date/Amount Notification     Send Threshold Notification

[Expand All](#)    [Collapse All](#)

**▼ Date Notification**

Notify User when contract is within specified days of Expire Date.

Expire Date        Notify Days Before Expires

Expiration Notification Date 02/01/2020

Notify User when contract is within specified days of Renewal Date.

Renewal Date        Notify Days Before Renewal

Renewal Notification Date

Notify User when New Contract or Draft is within specified days of Approval Due Date.

Approval Due Date        Notify Days Before Approval

Approval Notification Date

**▼ Maximum Amount Notification**

Notify User when the total contract released amount is either within the specified amount , or within the specified percentage, of the maximum contract amount.

Amount Less than Maximum  USD

Percent Less than Maximum

Notification Amount

**▼ Spend Threshold Notification**

Notify User when the released amount exceeds the threshold.

Threshold Notification Amount  USD

**▼ Notification Assignments** Personalize | Find | View All |  |

1	Notification Type	User ID	User Description	Email Address
1	<input type="text"/>	<input type="text"/>		

**▼ Amount Summary**

Maximum Amount	100,000.00	USD
Total Line Released Amount	0.00	
Total Category Released Amount	0.00	
Open Item Released Amount	0.00	
<hr/>		
Remaining Amount	100,000.00	
Remaining Percent	100.00	

Complete the page based upon the types of threshold and notifications needed

Field	Value
Send Date/Amount Notification	Select to notify when a Contract will expire or reaches the maximum amount
Send Threshold Notification	Select to notify when a contract reaches or exceeds a spend threshold

**Date Notification**

Field	Value
Expire Date	Defaults from the Contract Page
Notify Days Before Expires	Enter the number of days before to send notification
Renewal Date	Defaults from the Contract Page
Notify Days Before Renewal	Enter the number of days before to send notification

In each case the system will calculate and display the expiration notification date

**▼ Date Notification**

Notify User when contract is within specified days of Expire Date.

**Expire Date** 02/28/2019                      **Notify Days Before Expires**

**Expiration Notification Date** 01/29/2019

Notify User when contract is within specified days of Renewal Date.

**Renewal Date**    **Notify Days Before Renewal**

**Renewal Notification Date**

**Note:** Updating any of these days on the notification page will update the values on the main page of the Contract

**Maximum Amount Notification**

Field	Value
Amount Less than Maximum	Enter a value below the maximum to send a notification Entering an amount will automatically calculate the percentage
Percent Less than Maximum	Enter a percentage below the maximum to send a notification Entering a percentage will automatically calculate the amount

Once entered, the system will calculate and display the notification amount

**▼ Maximum Amount Notification**

Notify User when the total contract released amount is either within the specified amount , or within the specified percentage, of the maximum contract amount.

**Amount Less than Maximum**  USD

**Percent Less than Maximum**

**Notification Amount**                                      12,000.00

### Spend Threshold Notification

Field	Value
Threshold Notification Amount	Enter a value to send a notification

This will apply to each line on the contract

▼ **Spend Threshold Notification**

Notify User when the released amount exceeds the threshold.

Threshold Notification Amount  USD

### Notification Assignments

Field	Value
Notification Type	Drop down of available notifications
User ID	Select from valid user ids (internal and supplier will use email on profile)

To add multiple users click the +

There is no set limit on how many users may be sent a notification.

Users may also receive multiple types of notifications.

▼ Notification Assignments				Personalize	Find	View 4	Print	Grid	First	1-5 of 5	Last
	Notification Type	User ID	User Description	Email Address							
1	Approval Due	HubertSt	DOC-Hubert Stacey	doit.core.emailtest@ct.gov							
2	Expiration	HubertSt	DOC-Hubert Stacey	doit.core.emailtest@ct.gov							
3	Maximum Anr	HubertSt	DOC-Hubert Stacey	doit.core.emailtest@ct.gov							
4	Renewal	FragolaS	DOC-Fragola Stephanie L	doit.core.emailtest@ct.gov							
5	Spend Thresl	11046TEST		bryan.chavez@ct.gov							

## Amount Summary

These fields are populated based on the transactions against the contract. This section is also displayed on the Contract Entry page.

Amount Summary		
Maximum Amount	100,000.00	USD
Total Line Released Amount	0.00	
Total Category Released Amount	0.00	
Open Item Released Amount	0.00	
<hr/>		
Remaining Amount	100,000.00	
Remaining Percent	100.00	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>		

Once all the values have been entered/updated click OK to return to main contract page.

When a threshold is met, an email is generated and an entry is created in the user's worklist

### Sample E-mail

**Contract Notifications for: SetID = STATE, Contract ID = 18MHASCMTEST**

bryan.chavez@ct.gov

Sent: Wed 1/10/2018 2:42 PM

To:  Guilmartin, Brian

---

The following alerts apply for Contract SetID: STATE, Contract ID: 18MHASCMTEST, Version: 1. This contract begins on 2017-12-01 and is described as: SCMT Testing.

Master Contract ID:

Contract is nearing or has reached its Expiration Date: 2017-12-31

URL: [http://web033.crct.ct.gov:13300/psp/FN92TPR/EMPLOYEE/ERP/c/ADMINISTER\\_CONTRACTS.CNTRCT\\_ENTRY.GBL?Page=CNTRCT\\_HDR&CNTRCT\\_ID=18MHASCMTEST&SETID=STATE&VERSION\\_NBR=1&Action=U](http://web033.crct.ct.gov:13300/psp/FN92TPR/EMPLOYEE/ERP/c/ADMINISTER_CONTRACTS.CNTRCT_ENTRY.GBL?Page=CNTRCT_HDR&CNTRCT_ID=18MHASCMTEST&SETID=STATE&VERSION_NBR=1&Action=U)

### Worklist entry

Worklist

Worklist for HubertSt: DOC-Hubert Stacey

Detail View Worklist Filters Contract Thresholds

From	Date From	Work Item	Worked By Activity	Priority	Link		
DOC-Hubert Stacey	01/22/2018	Contract Thresholds	Expiring Contracts / Max \$	<input type="text" value=""/>	<a href="#">18DOC76681PSA01_STATE_1_2020-02-01_0000011046_HubertSt</a>	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>