Indiana Department of Administration
Procurement Division

Supplier Contract Management (SCM)
Importing Contracts and Amendments

Using this process, an existing executed contract is imported into SCM so that a new amendment/renewal can be processed in SCM.

The existing contracts may be governed by the Professional Services Contract manual posted at www.in.gov/idoa/3000.htm or the Delegation of Purchasing Authority Program manual posted at www.in.gov/idoa/2865.htm.

If questions arise when SCM is being used, refer to www.in.gov/idoa/3016.htm for:

- Archived News Flashes
- Supporting Materials
- Online Trainings
-

You will find video resources (include audio) throughout this manual indicated by the Watch It icon. The videos are also posted on the SCM Video Resources Center at https://www.in.gov/idoa/3016.htm.

Browser and Software Requirements

Internet Explorer(IE) version 11.0 or earlier and Mozilla Firefox are the acceptable browsers to use when signing a contract. Google Chrome is not compatible and cannot be used. Adobe Reader version 10.0 or later is required. Adobe Reader can be downloaded for free from www.adobe.com/reader/

Table of Contents

Importing Existing Executed Documents

A Transactional Contract Document does not exist in SCM and must be created prior to creating the SCM Amendment Document. The executed document(s) need(s) to be imported into PeopleSoft in order to do a future amendment/ renewal within SCM.

Before beginning the process, gather the following information/documents:

1. Vendor must be in PeopleSoft and tied to an active Bidder ID. Does the vendor have an active Bidder Registration? What is the Bidder ID? If not, Bidder Registration must be completed by the vendor.

Main Menu > Vendors > Vendor Information > Add/Update > Vendor

ary | Contacts | Profile

SetID: STIND   Vendor ID: 0000009015   THE UNIFORM HOUSE

Bidder Buy Indiana self-certification

dor Activation Date: 08/23/2005

stered by Procurement   Bidder ID: 0000001254   Certified:

Registered   Buy Indiana: PrincipalPlace of Business

2. What is the original contract's last signature date?

Jessica Robertson, Commissioner   Brian E. Bailey, Director

Date: 10/20/2015   Date: 11-20-15

APPROVED as to Form and Legality:
Office of the Attorney General

Donald Hannah (for)
Gregory F. Zoeller, Attorney General

Date: 11.24.15

3. Are amendments/renewals to be imported as well? How many? Are the amendment/renewal documents available electronically? What is the last signature date for each amendment/renewal?

Considerations when Using the Importing Contracts and Amendments Manual

1. Does the Vendor/Contractor/Grantee have an Active status with the Auditor of State? Yes _____ No _____
   What is the Vendor ID number? _____

2. Information required from the original contract, previous Amendments and/or previous Renewals:
   a. How many Amendments/Renewals are there to import? _____
   b. Who should be listed as the Administrator? _____
   c. What was the original contract begin date? _____
   d. What is the most current expiration date? _____
   e. What should be entered as the contract description? _____
   f. What should be entered as the maximum amount? _____
   g. What should be entered as the business unit, ship to, and department number? _____
   h. What should be entered as the line item information or UNSPSC category? _____
   i. Is there any subcontractor commitment?   Yes___ No _____
      The required details: Tier 2 Type, bidder id, participation percentage, utilization date and scope of work for each one.

3. Document Type – which contract template was used on the original contract? _____

4. Requisition Type – what was the type of the original contract document? _____

5. You must select the appropriate import path – just the original, the original plus one Amendment/Renewal, or the original plus many Amendments/Renewals
   a. Do you have the last signature date for each document?   Yes___ No _____
   b. Do you have electronic versions of each document?   Yes___ No _____
   c. Are the file name(s) less than 60 characters?   Yes___ No _____

6. You must have an approved and valid Requisition if there will be an increase in funds as a result of the new Amendment/Renewal being created in SCM

7. You must be able to select the appropriate Import Configurator ID for the Amendment/Renewal being created in SCM

8. Does the Amendment/Renewal require IOT approval?   Yes___ No _____

9. Is the Amendment/Renewal a zero dollar amount?   Yes___ No ____

10. You must edit the Amendment/Renewal appropriately – add, delete or edit contract clauses

11. Where should your working files should be saved? _____

12. Do you have electronic versions of the supplemental documents?   Yes___ No ____

13. If using internal collaboration, does the collaborator have the required access?   Yes___ No ____

14. Has the Vendor/Contractor/Grantee at least started the bidder registration process? Yes___ No ____
    What is the Bidder ID number? _____

15. Who is the External Signer? You will need the first name, last name and email address so you can identify or create the signer id _____
    a. Is it the person listed to the right of the Bidder ID to copy field?   Yes____ No _____
    b. Is the person already in the existing Signers Table?   Yes____ No _____
    c. Do you need to create a new Signer ID?   Yes____ No _____

16. Who is the Internal Signer? _____
    Does the user have the required access?   Yes___ No ____

17. Do you have access to the contract clearance check results? Yes____ No ____
18. Which oversight agencies should be in the approval workflow? _____
19. Should the contract be placed on the Indiana Transparency Portal? Yes____ No ____
20. Who do you need let know that the contract has been executed? _____

Financials Procedure Overview

Purchase that does require solicitation and an SCM contract
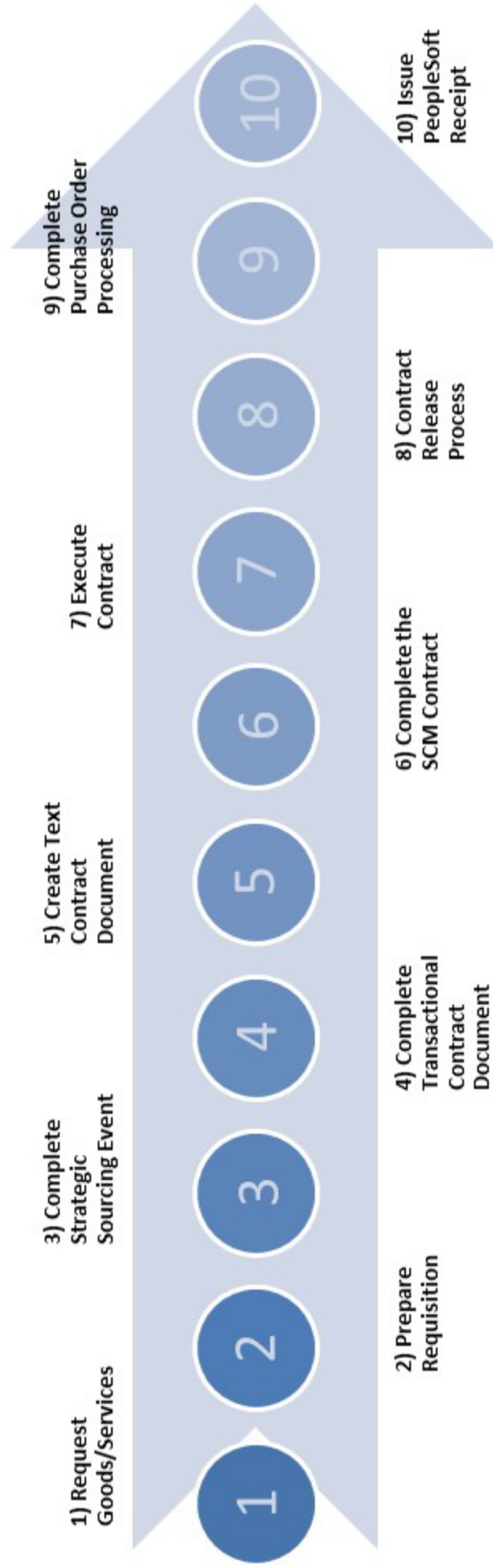
1) Request Goods/Services

2) Prepare Requisition

3) Complete Strategic Sourcing Event

4) Complete Transactional Contract Document

5) Create Text Contract Document

6) Complete the SCM Contract

7) Execute Contract

8) Contract Release Process

9) Complete Purchase Order Processing

10) Issue PeopleSoft Receipt

1. Click the **Add a New Value** tab

2. Click **Add**

3. Review/Complete the Header Requirements
   a. Enter/Look up Administrator/ Buyer (PS User ID of contract author)
   b. Enter/Look up Vendor Name or Vendor ID (found on the most current Executive Document Summary [EDS])
   c. Enter Begin Date (original contract Date)
   d. Enter the Expire Date (the most current expiration date)
   e. Enter the Maximum Amount (this includes original contract and all amendment/renewal amounts even if entering .001 for a zero dollar contract)
   f. Enter Contract Description (enter the 3 digit Business Unit followed by a description; 30 character limit)

4. Enter Line Items or a Line Category - Choose only one of the two options.

   ❗ If this is a Zero based contract, the Line Category must be 01234567.

5. Click **PO Defaults** hyperlink

6. Complete PO Defaults page

STOP

These values are critical to route the SCM Contract Document through the correct approval workflow.

a. Enter/Look up Business Unit (required)

b. Enter/Look up Ship To: (required)

All Ship To codes begin with the three-digit Business Unit number. By entering the three digit Business Unit number before clicking Look Up (magnifying glass), a list of every Ship To code for that agency will be returned.

c. Enter/Look up Dept (agency department ID) (required)

d. Click **OK**

7. Click **Tier 2 Details** tab (Minority/Women/Veteran Business Enterprises participation)

All minority, women-owned and veteran business enterprises participating as subcontractors in fulfillment of the Contractor's duties should be recorded on the Transactional Contract Document. The entry accurately documents sub-participation.

a. Review the original contract to acquire participants' information
b. Select Tier 2 Type (If no participation, select **NONE** and go to 8 on Phase1-3)
c. Enter/Look up Bidder ID
d. Enter participation Percentage
e. Enter Utilization Date
f. Enter Scope

g. Click **Add (+)** to insert additional lines, then repeat b-f above.

8. Click **Contract** tab
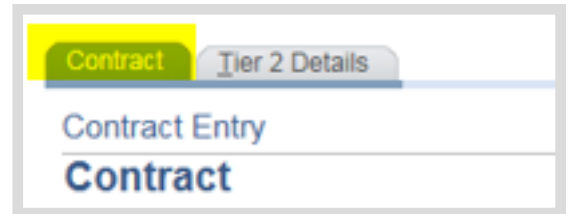
9. Click **Save**
   Make note of the 25 digit Contract ID assigned by PeopleSoft.
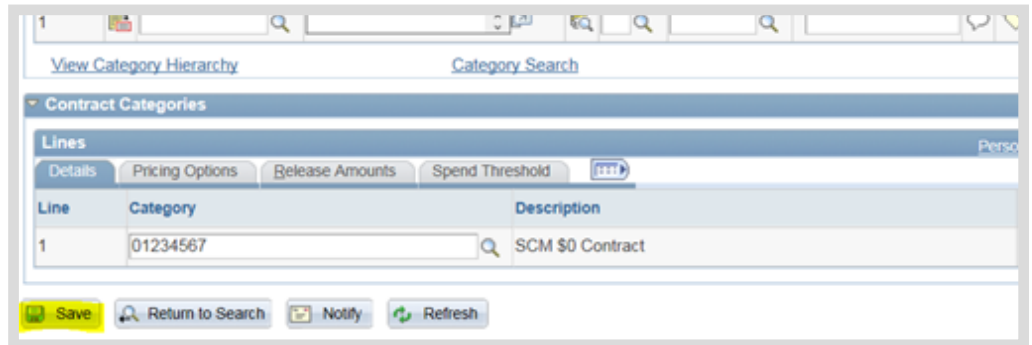
Sample of Transactional Contract Document

Contract Entry
Contract

SetID: STIND			
Contract ID: 00000000000000000015045	**Seq#:**		
*Status: Open	**Location:** None		
Administrator/Buyer: J005563		Werner,Jeanla-061	

Contract Version

Version: 1 **Status:** Current
Approval Due Date:

[Add a Document]

Set ID

Populated as STIND (State of Indiana).

Contract ID

A 25 digit contract number auto-assigned by PeopleSoft. The Contract ID number replaces the EDS number.

Status

All Transactional Contract Documents will be created and edited in Open status.

Administrator/Buyer

The PeopleSoft ID of the contract author.

Add a Document

Clicking this begins the creation process of the SCM Contract Document after all fields have been completed. *(Displayed only for new Transactional Contract Documents where no SCM Contract Document exists)*

Header

Process Option:	General Contract
Vendor:	FAWILHELMC-00
*Vendor ID:	0000109045
	FA WILHELM CONSTRUCTION CO INC
*Begin Date:	12/01/2016
Expire Date:	11/30/2017
Renewal Date:	
Currency:	USD CRRNT
Primary Contact:	Contact Name:
Vendor Contract Ref:	
Description:	061 Consulting

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

Activity Log
Document Status
Thresholds & Notifications

Amount Summary

Maximum Amount:	1,000.000	USD
Line Item Released Amount:	0.000	
Category Released Amount:	0.000	
Open Item Released Amount:	0.000	

Vendor/Vendor ID

Confirm that the Vendor name or Vendor ID matches the most current Executed Document Summary (EDS).

Begin Date & Expire Date

Dates that should reflect the expected term of the contract. Confirm the Begin Date is the original contract date and the Expire Date is the most current expiration date.

Description

Confirm entry of the 3 digit Business Unit and description.

Maximum Amount

Confirm this includes original contract and all amendment/renewal amounts.

Add Comments

Can be used to document information specific to the Transactional Contract Document.

Contract Activities

Can be used to record action/activities concerning the Transactional Contract Document.

Contract Header Agreement

Not to be used at this time.

Contract Releases

Used to issue a Purchase Order when the SCM Contract Document has been executed.

Activity Log

Displays system-recorded activity concerning this Transactional Contract Document.

Document Status

A search tool that locates all documents associated with this Transactional Contract Document.

(Requisition, Sourcing Event, Purchase Order, Receipt(s), Voucher(s), Payment(s), etc.)
\

Thresholds & Notifications

Not available at this time.

WATCH IT!

1. Click **Add a Document**

   The Create Document page will appear

Werner,Jeania-061	**Add a Document**

2. Choose Criteria to Build Template

   a. Click **Look Up (magnifying glass)** to select Document Type (should represent the boilerplate used on original executed contract)

Document Type	Description
00061_OFFICE_SUPPLY	00061 Coordi
00061_PW_CONS<$150K	00061_PW_C
00061_PW_CONS>$150K	00061_PW_C
00061_PW_CONSULTANT	00061 PW Co
00061_PW_DESIGNER	00061 PW De
SOI_ADDENDUM	SOI Addendum
SOI_COUNSEL	SOI Agreement with Outside Cou
SOI_EDU	SOI Educational/Institutions
SOI_EQUIP_LEASE_PURC	SOI Equipment Lease Purchase
SOI_EQ_LEASE_RENTAL	SOI Equipment Lease Rental
SOI_GRANTS	SOI Grant Template
SOI_IBM_BOA	SOI IBM Basic Ordering Agreeme

   SetID: STIND
   Vendor: FA WILHELM CONSTRUCTION CO INC
   Document Type: SOI_PROF_SERVICES
   Configurator ID: SOI_PROF_SERVICES SO
   Description: 061 Consulting
   Administrator: J005563 We
   Sponsor:
   Department: 039095 DOA - Procurement - Admi

   b. Review/update Description

      A 60 character field used to describe this contract.

   c. Review/update Administrator

   d. Enter Sponsor (if desired)

      Not required, this field provides an option to note a secondary/alternate agency contact. SCM generated email notifications are not sent to the sponsor.

   e. Review/update Department

      Required for all SCM Contract Documents as it designates workflow approval route; comes from PO Defaults.

STOP

The Requisition Type is critical to route the SCM Contract Document through the correct approval workflow.

   f. Click the **drop down arrow** to select Requisition Type (Represents the Req/PO type used on the original executed contract.) See list on next page.

   Requisition Type: Professional Service Contract

! This is a critical decision point. Every subsequent document created will be impacted through the Requisition type chosen. The Requisition Type and the Document Type should be as similar as possible.

Requisition Types that are used for SCM Contract Documents

Equipment Lease Agreement

Equipment Lease to Purch Agree

Grant

IBM Basic Ordering Agreement

Info Tech Addendum

Info Tech Prof Services

Maintenance of Equipment

Memo of Understanding

Procurement Service Contract

Professional Service Contract

g. Click **Import Document**

Create Document	Import Document

! The Original EDS field is available to enter the EDS number as a reference.

Administrator:	R003621	Q	Roxie Coble - 00061
Department:	039095 Q	DOA - Procurement - Admin Svcs	Original EDS: SOBC-4-3050-20 Q

3. Determine the appropriate path based on what is being imported

SCM will consider the document an "amendment" if it was an amendment and/or a renewal when originally executed.

Only the Original Contract/ Document	Original Contract/Document and 1 Amendment/Renewal	Original Contract/Document and Multiple Amendments/Renewals
Complete actions on **Phase2-4**	Complete actions on **Phase2-5 through Phase 2-6**	Complete actions on **Phase2-7 through Phase 2-9**

Importing Only the Original Contract/Document

1. Verify **Current Contract/ Document** is selected

Import Option

⦿ **Current Contract/Document**
(Current Contract/Document with no formal amendments or history to load.)

○ **Amended Contract**
(Single current contract as fully amended requiring an amendment number. History is optional.)

2. Enter the appropriate information for the Original Contract/Document
   a. Enter Version = 1.0
   b. Enter Status Date (last signature date of the contract)

Basic Info	Details			
Type	**File Name**	**Version**	**Status**	**Status Date**
Contract Document		1.0	Executed ▾	10/04/2008 🗓

3. Click **Upload**

Status Time	Upload	Clear	
	Upload	Clear	

4. Click **Browse**

   Search the network file directories and locate/select the saved Text Contract Document.

   ? Hel

   C:\Users\idoatraining\Desktop\SCM_Import\33614-000 [Browse...]

   [Upload] [Cancel]

5. Click **Upload**

   ❗ If the message below is received, decrease the size of the file name to less than 60 characters.

   Message

   Attachment failed to upload. (18036,10013) Attachment operation failed for unknown reasons. (Attachment built-in error 12). (18036,10003)

   OK

6. Click **Done with Import**
   A warning pop-up box will appear.

   Prior Version is not applicable

   [Done with Import] [Cancel]

7. Select the appropriate option to indicate if changes are needed.
   a. Click **Yes** if no changes needed. No further edits will be available.
   b. Click **No** if changes are necessary.

   Are you sure you are done with import? (10420,576)

   If you click Yes, system will save the imported files. You may no longer change them. If you click No, you may go back to reload a previously imported file.

   [Yes] [No]

STOP

If the Contract Administrator answered Yes when the answer should have been No, a GMIS issue will need to be submitted to cancel the Transactional Contract Document. It will be necessary to restart the Create the Transactional Contract Document process.

8. Continue to Document Management Page on Phase2-10

Importing the Original Contract/Document and One Amendment/Renewal

1. Select **Original and Amendment**

   (Current Contract/Document with no formal amendments or history to load.)

   ⚪ **Amended Contract**
   (Single current contract as fully amended requiring an amendment number. History is

   ⚪ **Amended Contract and Amendment**
   (Current contract as fully amended and a current separate amendment summary file.

   🔘 **Original and Amendment**
   (Original contract as originally signed and a current separate amendment summary fil

2. Enter the appropriate information for the Original Contract/Document

   a. Enter Version = 1.0
   b. Enter Status Date (last signature date of the contract)

File Name	Version	Status	Status Date
ent	1.0	Executed ⌄	10/04/2008 📅

3. Click **Upload**

Status Time	Upload	Clear	
	Upload	Clear	

4. Click **Browse**

   Search the network file directories and locate/select the saved Text Contract Document.

   C:\Users\idoatraining\Desktop\SCM_Import\33614-000   Browse...

   Upload   Cancel

5. Click **Upload**

   ⚠ If the message below is received, decrease the size of the file name to less than 60 characters.

   Message

   Attachment failed to upload. (18036,10013) Attachment operation failed for unknown reasons. (Attachment built-in error 12). (18036,10003)

   OK

6. Enter the appropriate information for the Amendment/Renewal Document

   ⚠ SCM will consider the document an amendment if it was an amendment and/or a renewal when originally executed.

   a. Enter **Version** = 2.0
   b. Enter **Amendment** = 1
   c. Enter **Status Date** (last signature date of the amendment/renewal)

   Current Version

   Basic Info   Details   📰

Type	File Name	Version	Amendment	Status	Status Da
Original Contract	Original.pdf	1.00		Executed	10/04/20
Amendment File		2.00	1	Executec ⌄	1003200

7. Click **Upload**

8. Click **Browse**

   Search the network file directories and locate/select the saved Text Contract Document.

9. Click **Upload**

   ! If the message below is received, decrease the size of the file name to less than 60 characters.

   Message

   Attachment failed to upload. (18036,10013) Attachment operation failed for unknown reasons. (Attachment built-in error 12). (18036,10003)

   OK

10. Click **Done with Import**

    A warning pop-up box will appear.

    Amendment File   33614-001_Renewal.pdf   2.00

    To specify Prior Versions enter an Amendment number greater than 0 in the Cu

    Done with Import   Cancel

11. Select the appropriate option to indicate if changes are needed.

    a. Click **Yes** if no changes needed. No further edits will be available.
    b. Click **No** if changes are necessary.

    Are you sure you are done with import? (10420,576)

    If you click Yes, system will save the imported files. You may no longer change them. If you click No, you may go back to reload a previously imported file.

    Yes   No

STOP   If the Contract Administrator answered Yes when the answer should have been No, a GMIS issue will need to be submitted to cancel the Transactional Contract Document. It will be necessary to restart the Create the Transactional Contract Document process.

12. Continue to Document Management Page on

1. Select **Original and Amendment**

○ **Current Contract/Document**
(Current Contract/Document with no formal amendments or history to load.)

○ **Amended Contract**
(Single current contract as fully amended requiring an amendment number. History i:

○ **Amended Contract and Amendment**
(Current contract as fully amended and a current separate amendment summary file

● **Original and Amendment**
(Original contract as originally signed and a current separate amendment summary f

2. Enter the appropriate information for the Original Contract/Document
   a. Enter Version = 1.0
   b. Enter Status Date (last signature date of the contract)

ile Name	Version	Status	Status Date
	1.0	Executed ∨	10/04/2008 📅

3. Click **Upload**

Status Time	Upload	Clear	
	Upload	Clear	

4. Click **Browse**
   Search the network file directories and locate/select the saved Text Contract Document.

C:\Users\idoatraining\Desktop\SCM_Import\33614-000 | Browse...

Upload   Cancel

5. Click **Upload**
   If the message below is received, decrease the size of the file name to less than 60 characters.

Message

Attachment failed to upload. (18036,10013) Attachment operation failed for unknown reasons. (Attachment built-in error 12). (18036,10003)

OK

6. Enter the appropriate information for the Amendment/Renewal Document
   SCM will consider the document an amendment if it was an amendment and/or a renewal when originally executed.

   Enter **Version** = 2.0
   a. Enter **Amendment**
      The quantity is the total number of amendments/renewals being uploaded.

	Version	Amendment	Status	Status Date
	1.00		Executed	10/4/2008 📅
	2.00	4	Execute ∨	10/3/2016 📅

   b. Enter **Status Date** (last signature date of the most current amendment/renewal)

7. Click the **triangle** left of Prior Versions to add additional Amendments/Renewals

8. Enter the appropriate information for the Amendment Document
   a. Enter **Version** = 3.0
   b. Notice the **Amendment** defaults
   c. Enter **Status Date** (last signature date of corresponding amendment/renewal)

9. Click **Upload**

10. Click **Browse**
    Search the network file directories and locate/select the saved Text Contract Document.

11. Click **Upload**
    If the message below is received, decrease the size of the file name to less than 60 characters.

12. Repeat steps 8-11 for all remaining amendment/renewal documents
    Increase the version number by one with each additional amendment/renewal document entered.

13. Click **Done with Import**
    A warning pop-up box will appear.

14. Select the appropriate option to indicate if changes are needed.

      a.   Click **Yes** if no changes needed. No further edits will be available.

      b.   Click **No** if changes are necessary.

Are you sure you are done with import? (10420,576)

If you click Yes, system will save the imported files. You may no longer change them. If you click No, you may go back to reload a previously imported file.

Yes   No

STOP

If the Contract Administrator answered Yes when the answer should have been No, a GMIS issue will need to be submitted to cancel the Transactional Contract Document. It will be necessary to restart the Create the Transactional Contract Document process.

15. Continue to Document Management Page on Phase2-10

Sample of Imported Document Management Page

After the original contract/document and amendments/renewals have been imported, the Document Management page will open.

Hover over the   question marks to learn more about each item on the page.

Document Management

SetID:	STIND	Contract ID:	00000000000000000000015046
Vendor:	FA WILHELM CONSTRUCTION CO INC		
Document Type:	SOI Professional Services		
Description:	061 Consulting		
Administrator:	Werner,Jeania-061		
Sponsor:		Department:	039095 DOA - Procurement - Admin Svcs

				Document Details
Amendment:	4	Created On:	10/03/16 12:00AM	
Version:	2.00	Amended On:	10/03/16 12:00AM	
Status:	Executed	Last Modified On:	12/06/16 9:35AM	
		Executed On:	10/03/16 12:00:00AM	

Reset to Dispatch

Create Amendment

Imported Document

View and Edit Options:

View Original Document

View Amendment File

Add Supplemental Documents

Document Version History

Review and Approval:

Internal Contacts/Signers

External Contacts/Signers

Clearance Check

Add External User

Other Document A

Send to

Import Pric

Creating Amendments/Renewals

(From Imported Contracts)

Main Menu >> Supplier Contracts >> Create Contracts & Documents >> Contract Entry

For Amendments/Renewals that require an increase in funds there must be a Requisition that is approved and has a valid budget status.

REQUISITION

Ship To:	IDOA, MIS Division 402 W WASHINGTON ST RM W478 INDIANAPOLIS IN 46204	

Requisition No.	Date	Required Date	Page
0000015757	09/07/2016		1 of 1

Fund/Account: 10560 / 532022
Dept Number: 039095
Project Number:
Requisition Number: 0000015757
Requestor: T207204 Bucker,Teresa-Proc-0
Agency Number: 00061 Administration
Facility:

Bill to: Indiana Dept of Administration
Controller's Office
402 W WASHINGTON ST RM W478
INDIANAPOLIS IN 46204

MUST COMPLETE FOR ICPR
_____ Print REQ
_____ Streamline Eligible

Line	Item	Description	Quantity	UOM	Unit Price	Ext Amt
	window washing services					
1-1		2017 window washing	1.0000	ANN	1,250.0000	1,250.00
		The following UN/CEFACT Unit of Measure Common Codes are used in this document: ANN Year				

Requisition Total $ 1,250.00

Phase 3: Update the Transactional Contract Document

Main Menu >> Supplier Contracts >> Create Contracts & Documents >> Contract Entry

1. Update the Header Information
   a. Change Status to Open

SetID:	STIND
Contract ID:	0000000000000000000015046	Seq#:
*Status:	Open	Location: None

   b. Update Maximum Amount to include the amendment/renewal amount if there is a change in funds

   Amount Summary ?
   Maximum Amount: 2,000.000 × USD
   Line Item Released Amount: 0.000

   c. Update Expire Date (if applicable)

   *Begin Date: 12/02/2016
   Expire Date: 12/01/2017
   Renewal Date:

2. Verify PO Defaults page
   a. Click **PO Defaults** hyperlink

   PO Defaults   Add Open Item Price Adjustme

   b. Verify Business Unit

   Header
   Business Unit: 00061   Copy fron
   Vendor Loc: REMIT001
   Buyer:
   Origin: NON
   Currency: USD CRRNT   Billing
   Payment Terms ID: AREAR   ☑ Tax E

   c. Verify Ship To

   Shipping Information
   Ship To: 061MIS   Ship To Address   AM Bu
   Location:
   IN Unit: Profile
   Freight Terms: FOB DEST   Cost T
   Ship Via: Ultimat
   Charge By: Quantity   Where

   d. Verify Dept

   Distributions

*GL Unit	Fund	Account	Program	Dept	Bud Ref	PC Unit
00061				039095		

   Add Comments

   e. Click **OK**

   OK   Cancel   Refresh

3. Click **Save**

   Save   Notify   Refresh

Step 1: Initiate the Text Contract Document

1. Click **Add a Document**

   The Create Document page will appear

   | This becomes Maintain Document
   : if the Contract Administrator logged out of PeopleSoft.

Approval Due Date:

Add a Document

2. Click **Create Amendment**

   A message window will open regarding Clearance Checks

   Reset to Dispatch

   Create Amendment

3. Click **Yes**

Message

Creating an amendment will delete the existing clearance check and require a new one, continue? (30000,228)

Yes   No
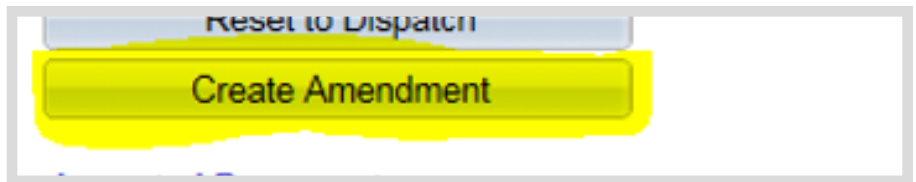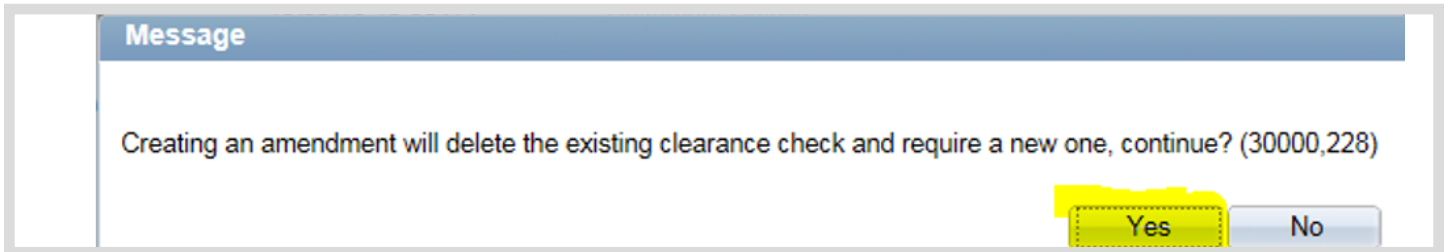
Step 2: Choose Configurator ID

1. Leave **Amendment Option** as Amendment Files Only (do not change)

Create an Amended Version

Select amendment option, desired version and comment as to why the amendment is necessary and press OK. Document(s) will then be generated based on amendment option.

Amendment Option: Amendment Files Only

Amendment Configurator ID: [   ] 🔍 Does this

Zero Amount Amendment: [▾]

Version: ○ Reset Version back to 0.00

2. Click **Look Up (magnifying glass)** to select the Amendment Configurator ID

Create an Amended Version

Select amendment option, cesired version and comment as to why the amendment is necessary and press OK. Document(s) will then be generated based on amendment option.

Amendment Option: [Amendment Files Only ▾]

Amendment Configurator ID: [   ] 🔍 Does tl

3. Select the appropriate Configurator ID specifically with "IMPORT" in the name to determine the amendment/renewal boilerplate based on the original executed contract.

⏐ If the user does not select one with the word "import", then the approval boxes will not be present on the document.

00499 AMENDMENT INC	PCON	00499 ISDH Amendment to increase for WIC Contracts
00502 FA CP FUNDING	PCON	DCS CP Funding Amendment
00510 GRANT AMEND	PCON	00510 DWD Grant Amendments
00719 AMENDMENT	PCON	00719 Amendment
00800 AMEND CONS	PCON	00800 Consulting Amendment
00800 AMEND IMPORT	PCON	00800 Import Consulting Amendment
SOI AMEND	PCON	SOI Amendment
▶ SOI AMEND IMPORT	PCON	SOI Imported Amendment
SOI IBM BOA AMENDMEN	PCON	IBM Ordering Agreement Amendment
▶ SOI IBM IMPORT AMEND	PCON	IBM Ordering Agreement Amendment used for Imported Docs
SOI LEASE AMENDMENT	PCON	SOI Real Estate Lease Amendment
SOI MOU AMEND	PCON	SOI MOU Amendment
▶ SOI MOU AMEND IMPORT	PCON	SOI Imported MOU External Amendment
▶ SOI RENEW IMPORTED	PCON	Renewals that DO allow a price increase.
▶ SOI RENEW NO IMPORT	PCON	Renewals that DO NOT allow a price increase
SOI RENEW NO PRICE	PCON	Renewals that DO NOT allow a price increase.
SOI RENEW PRICE INC	PCON	Renewals that DO allow a price increase.

Step 3: Build the Text Contract Document

1. Select whether this Amendment/ Renewal requires IOT approval; **Yes** or **No**

   🔍 Does this contract require IOT approval? [▼]

2. Select whether this is a Zero Amount Amendment; **Yes** or **No**
   a. **If no,** enter only the amount of the new amendment/ renewal in the Amendment field
   b. **If Yes,** no further action is required

Zero Amount Amendment:	No ▼
Amendment Amount:	1000.00 ×

3. Leave **Version** as defaulted (do not change)

Version:	○ Reset Version back to 0.00
	⦿ Minor Version (2.01)

4. Add **Comments** (optional)

5. Click **OK**

*Comments:	Amendment Created:
[OK] [Cancel]	

6. Click **OK** to the Generation Error Message

   Message

   Generation errors have been logged (10420,356)

   Check Generation Log.

   [OK]

Document Management Page

Below is the updated Document Management Page.

Hover over the 〔〕 question marks to learn more about each item on the page.

Document Management

SetID:	STIND	Contract ID:	00000000000000000000015046
Vendor:	FA WILHELM CONSTRUCTION CO INC		
Document Type:	SOI Professional Services		
Description:	061 Consulting		
		Transparency ID:	
Administrator:	Werner,Jeania-061		
Sponsor:		Department:	039095 DOA - Procurement - Admin Svcs

Amendment:	5	Created On:	10/03/16 12:00AM	Document Details
Version:	2.01	Amended On:	12/06/16 10:57AM	
Status:	Draft	Last Modified On:	12/06/16 10:57AM	

Includes Imported Document

View and Edit Options:
- View Original Document
- View Amendment File
- Edit Amendment File

Add Supplemental Documents
Document Modification Summary
Document Version History

Review and Approval:
- Route Internally
- Preview Approval
- Perform Clearance Checks
- Bypass Approvals

Internal Contacts/Signers
External Contacts/Signers
Clearance Check
Add External User

Other Document Act
- Send to C
- Recreate D
- Prepare Docume
- Import Prior

Generation Log

Step 4: Review/Edit the Text Contract Document

WATCH IT!

The check-out process ensures the integrity of the Text Contract Document is maintained by preventing revisions by other Contract Administrators until the Text Contract Document is checked in again.

The Contract Administrator should at a minimum review the Text Contract Document carefully after it is created to make sure the language and required information is complete.

Check Out the Text Contract Document

WATCH IT!

1. Click **Edit Amendment File**
   A pop-up message will offer the option to open or save the file.

   | View Amendment File |
   | Edit Amendment File |

2. Click the **drop down arrow** to the right of Save

   t to open or save STIND_000000000000000000015046_2.01.xml from devfs853.gmis.in.gov?   Open | Save ▼ | Cancel

3. Select **Save As**

4. Select location to save file
   ❗ Do not change the file name or file extension (XML) and remember where it is saved.

   ▷ Pictures
   ▷ Videos
   ▷ Computer

   File name: STIND_000000000000000000015046_2.01
   Save as type: XML Document

   ▲ Hide Folders   Save | Cancel

5. Click **Save**

6. Click **Open**

   2.01.xml from devfs853.gmis.in.gov?   Open | Save ▼ | Cancel | ✕

The determination to open or first save the Text Contract Document is based on the Contract Administrator's personal preference. Once the Text Contract Document is opened the Document Management page in PeopleSoft will update indicating that the

Status: Draft   Last Modified On: 12/06/16 11:21AM
                                        Checked Out On: 12/06/16 11:21AM
                                        Checked Out By: J005563

Includes Imported Document

View and Edit Options: **Review and Approval:**
   View Original Document   Internal Contacts/Signers
   View Amendment File   External Contacts/Signers
   Check In   Clearance Check
   Cancel Check Out   Add External User
Add Supplemental Documents

SCM Contract Document has been checked out. The Text Contract Document must be saved before it can be checked in again.

Edit the Text Contract Document

Complete the Text Contract Document according to the contractual obligations and/or negotiations that have taken place.

The Text Contract Document will be checked out in Microsoft Word with Track Changes turned on.

It is recommended that Track Changes remain on at this point if the Text Contract Document will be routed for internal collaboration (see Internal Collaboration, Phase4-12).

For additional information, refer to the *Microsoft Word: How to Track Changes in Documents* training video on http://www.in.gov/idoa/3016.htm.

How to Accept/Reject Tracked Changes

a. Select Review

b. Locate Accept or Reject Icon

c. Click the Accept or Reject Arrow for all options
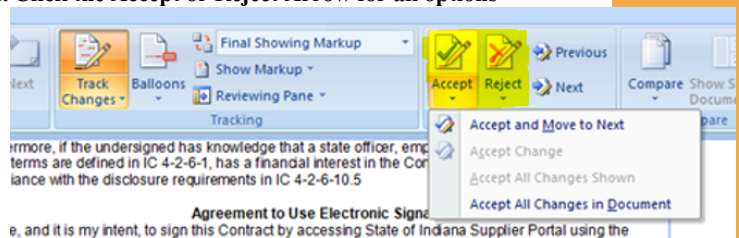
d. Select the option that best fits the business practice

1. Enter missing variables

   Look for "%%" and blanks.

> This is an Amendment to the Contract (the "Contract") entered into by and between the %%AGENCY_NAME%% (the "State") and FA WILHELM CONSTRUCTION CO INC (the "Contractor") approved by the last State signatory on _____.
>
> In consideration of the mutual undertakings and covenants hereinafter set forth, the parties agree as follows:
>
> 1. The Contract is hereby [renewed] [extended] for an additional period of _____. It shall terminate on December 01, 2017.
>
> ... Total remuneration under
>
> into this Amendment. The parties, having read and understood the foregoing terms of this Amendment, do by their respective signatures dated below agree to the terms thereof.
>
> FA WILHELM CONSTRUCTION CO INC   (Enter Agency Name)

2. Add Attachments/Exhibits

   Attachments/exhibits that need to be incorporated as part of the legally binding SCM Contract Document must be inserted into the Text Contract Document directly following the signature/approval page. The entire SCM Contract Document will be posted to the Transparency Portal if designated by the Contract Administrator.

Exhibit/Attachment Formatting Considerations
- **Inserting PDF files into the Text Contract Document**
  Convert PDF files to TIFF files.
- **Microsoft Word Functions**
  Copy/paste can be used. Microsoft Excel tables can be used, but be careful with the formatting.
- **Graphics/Images**
  Graphics can be included, but be careful with the formatting.
- **File Size Limitations**
  There is no file size limit as long as the SCM Contract Document is not being emailed. If the file needs to be emailed, then the file size must be less than 25 MB.

If there is an ERROR with the following fields, it will be necessary to follow the below instructions.

- **State Name**
  If this is wrong, recreate the document (Phase4-19)

- **Vendor Name**
  If this is wrong, update the Transactional Contract Document and recreate the document (Phase4-19)

- **Start /End Date**
  If this is wrong, update the Transactional Contract Document and recreate the document (Phase4-19)

- **Consideration Amount**
  If this is wrong, the Contract Administrator must have the individual who completed the sourcing event update the amount in Sourcing. Then, recreate the document (Phase4-19)

Save the Text Contract Document

It is critical that users are cautious and mindful of the location where the Text Contract Document is saved.

WATCH IT!

1. Save the Text Contract Document using one of the following methods.
   When checking out the Text Contract Document initially if
   a. **Save As** was selected, click **Save**

   b. **Open** was selected,
      - Click **File**
      - Click **Save As**
      - Select location to save file

   ⏐ Do not change the file name or file extension (XML) and remember where it is saved.
      - Click **Save**

2. Click the **X** in the upper right hand corner to close the Text Contract Document

Check In the Text Contract Document

Once the Text Contract Document has been reviewed and any necessary adjustments made, the Word (XML) document must be checked in through PeopleSoft. If the Contract Administrator did not have the opportunity to check in the Text Contract Document in a reasonable time and is logged out of PeopleSoft, the process begins from the Document Management page.

1. Navigate to the Contract Entry page
   Main Menu > Supplier Contracts > Create Contracts and Documents > Contract Entry

2. Ensure the **Find an Existing Value** tab is selected

3. Enter search criteria for the Transactional Contract Document

4. Click **Search**

Find an Existing Value	Add a New Value

Search Criteria

SetID:	= ▾	STIND
Contract ID:	contains ▾	15046
Contract Version:	= ▾	
Version Status:	= ▾	
Contract Process Option:	= ▾	
Description:	begins with ▾	
Short Vendor Name:	begins with ▾	
Vendor Name:	begins with ▾	
Master Contract ID:	begins with ▾	

☐ Correct History   ☐ Case Sensitive

Search   Clear   Basic Search   💾 Save Search Criteria

5. Click any **hyperlink** in the row of the appropriate SCM Contract Document

   Search Results

   View All

SetID	Contract ID	Contract Version	Version Status	Contract Process Option
STIND	0000000000000000000015046	1	Current	General

   The Transactional Contract Document will open.

Contract Entry

Contract

SetID: STIND
Contract ID: 0000000000000000000015046   Seq#:
*Status: Open   Location: REMIT001

Administrator/Buyer: J005563   Werner,Jeania-061

Contract Version

Version: 1   Status: Current
Approval Due Date:

▾ **Authored Document**

| Authored Status: | Draft | Document Version: | 2.01 | Amendment: | 5 | Maintain Document |

6. Click **Maintain Document**

   The Document Management page will open in a new tab.

   | ment Version: | 2.01 | Amendment: | 5 | Maintain Document |
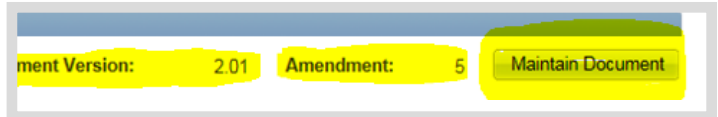
7. Click **Check In**

   The Check In Document page will open.

   View Amendment File

   Check In

   Cancel Check Out
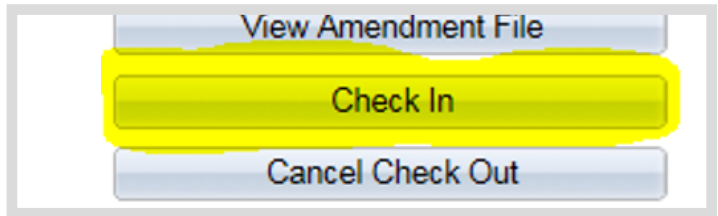
8. Verify that the correct SCM Contract Document and version will be checked in.

   elect the desired versioning option and enter a brief description describing the changes. Click the OK button to proceed and you will then t e filename for where the file you are checking in resides.

   etID: STIND   **Contract ID:**   0000000000000000000015046
   endor: FA WILHELM CONSTRUCTION CO INC
   ersion: ○ Same Version (2.01)
                  ◉ Minor Version (2.02)
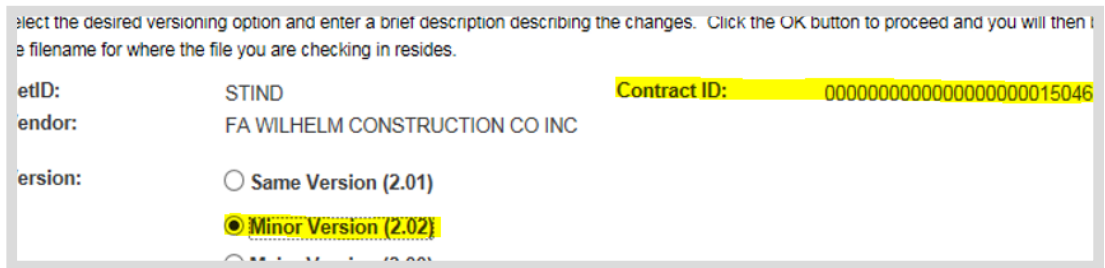
   The **Minor Version** option will be selected by default. Do not change.

9. Add Comments concerning this check in action (if applicable)

   *Comments: Check In:
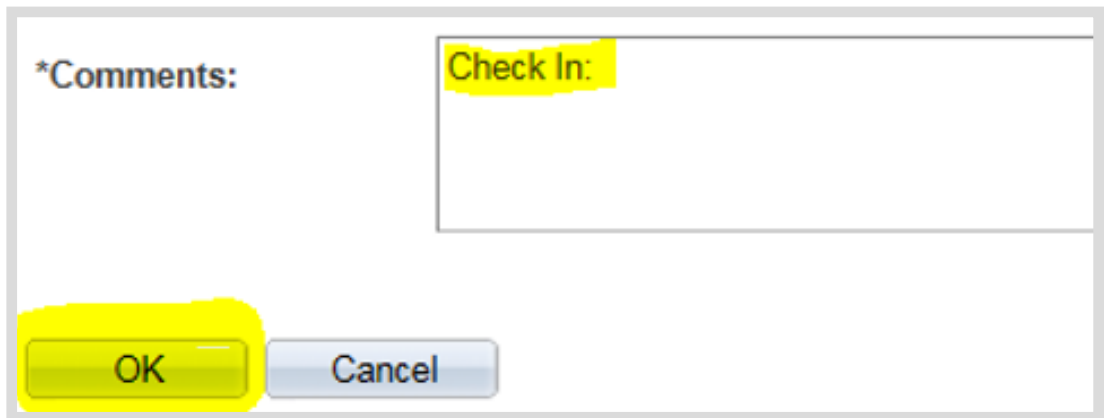
10. Click **OK**

    A pop-up window will open.

    OK   Cancel

11. Click **Browse**

    Search network file directories and locate/select the saved Text Contract Document.

    Check In Amendment File   ? Help

    C:\Users\jwerner\Desktop\STIND_0000000000000000   Browse...

    Upload   Cancel
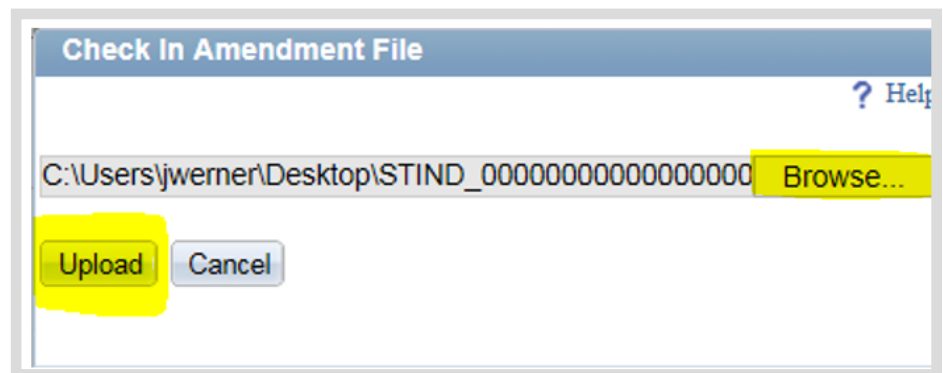
12. Click **Upload**

    The check in process will return to the Document Management page when the Text Contract Document has been successfully uploaded.

WATCH IT!

Required Supplemental Documents

To validate the procurement method used, the Contract Administrator must upload the appropriate supplemental document(s) that may include:

- RFP Award Letter

- Subcontractors' Minority or Women Business Certification letters

- DPAP Solicitation Summary

- Special Procurement Form and Approval

- Any documentation that explains the purchasing method and evaluation/award

- Clearance check results

    ❗ Failure to provide these details may delay SCM Contract Document approval.

An agency's business process may require other supplemental documents such as:

- Email correspondence concerning negotiations

- Research information gathered during planning phases

- Notes outlining specifications/qualifications to consider

Supplemental documents are references that are only accessible by internal resources and are not incorporated into the SCM Contract Document. These documents do not appear on the Transparency Portal. The Contract Administrator may elect to allow the supplemental documents to be emailed to the External Signer when the SCM Contract Document is sent for signature.

Any attachment, exhibit, or extraneous document referenced must be inserted into the SCM Contract Document and must follow the signature/approval page (See Edit the Text Contract Document, Phase4-6).

1. Click **Add Supplemental Documents**
   The Supplemental and Related Documents page will open.

> Edit Amendment File
>
> Add Supplemental Documents
>
> Document Modification Summary
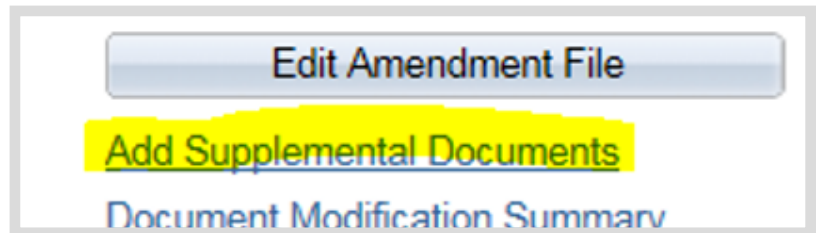
2. Click **Upload a Supplemental Document File**
   A pop-up window will open.

> **Supplemental and Related Documents**
>
> | | | |
> |---|---|---|
> | SetID: | STIND | Contract I |
> | Vendor: | FA WILHELM CONSTRUCTION CO INC | |
>
> WARNING - Supplemental Documents are not included as part of the legal co... or attachments. Anything that should be part of the legal document must be i...
>
> Upload a Supplemental Document File
>
> **Supplemental Documents**
> Files   Description   ▦▸

3. Click **Browse**

    Search network file directories and locate/select the saved supplemental document.

Upload Contract Document Supplemental File
? Help
C:\Users\jwerner\Desktop\Special Procurement Form an   Browse...
Upload   Cancel
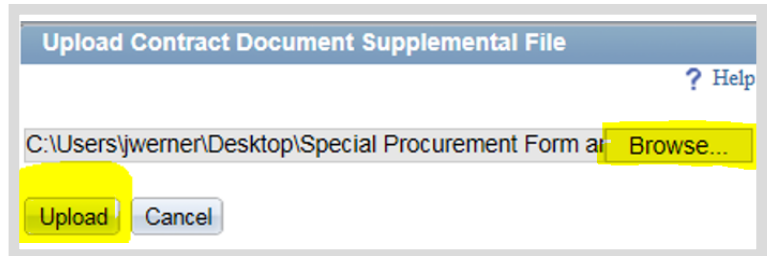
4. Click **Upload**

    The uploaded file will be displayed under the Supplemental Documents section.

Allow Email/Dispatch	File Name	Title	View	Delete
☐ ❷	Special_Procurement_Form_and_Approval.doc ❸	❹	View ❺	➖ ❻
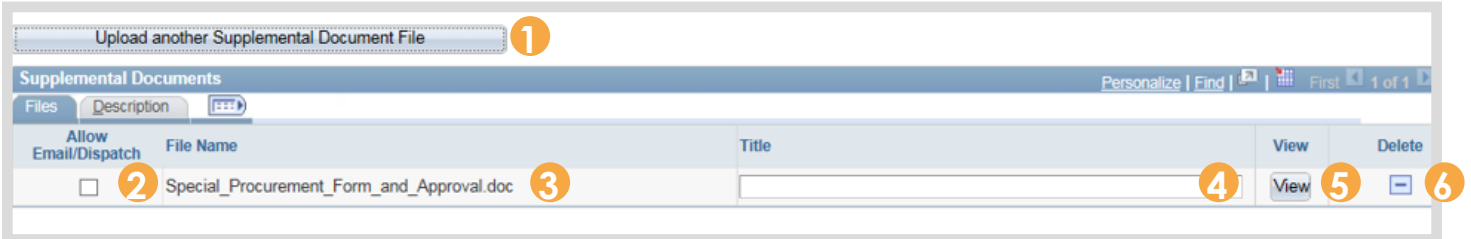
❶ **Click Upload Another Supplemental Document File to include additional documents.**

❷ **Check Allow Email/Dispatch to prepare the supplemental document to be shared with the External Signer. (If applicable)**

❸ **The File Name is what the supplemental document was originally titled when uploaded into PeopleSoft.**

❹ **Use the Title field to rename the supplemental document according to the agency's business process. (If applicable)**

❺ **Click View to open and review the supplemental document.**

❻ **Click Delete (-) at the end of the row to remove the supplemental document if needed.**

5. Click **OK** when finished

    The screen will return to the Document Management page.
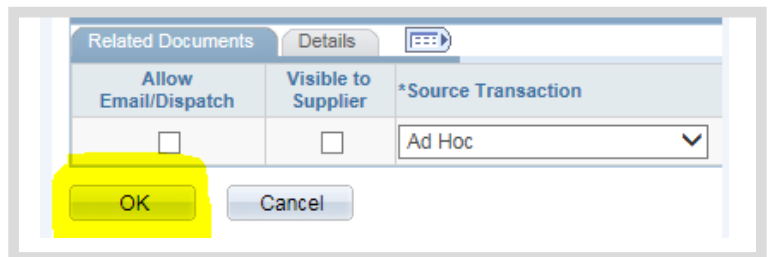
Step 6: Internal Collaboration

SCM provides an opportunity for the Contract Administrator to work with other agency personnel in preparing/authoring the Text Contract Document through the collaboration feature. The access granted (review or edit) to the Collaborator is set up by the Contract Administrator.

View Access

This provides the Collaborator the ability to review the Text Contract Document draft and provide comments to the Contract Administrator.

Edit Access

This provides the Collaborator the ability to review and edit the Text Contract Document draft and provide comments to the Contract Administrator.

> The Collaborator role is granted after completing the IDOA Contract Administrator training or the online collaboration training and a GMIS issue is submitted by the Agency Fiscal Security Coordinator. If there are access problems, submit an issue to GMIS.

> The Internal Collaboration process may be completed as many times as appropriate for the Business Unit's business process.

Collaboration must be finalized before the External Signer and Internal Signer can sign the SCM Contract Document.

Set up Internal Contact(s)

1. Click **Internal Contacts/Signers**

Review and Approval:

Route Internally

Preview Approval

Perform Clearance Checks

Bypass Approvals

Internal Contacts/Signers

External Contacts/Signers

The Internal Contacts List page will open.

Internal Contacts List

SetID:	STIND	Contract ID:	0000000000000000000013032
Vendor:	3M COMPANY		

The following list contains both internal collaborators and internal signers (if enabled). Use the 'Signature Settings' tab to specify which users are required to sign and have access the 'Sign Document' button for prepared documents. Depending on your setup Internal signatures can be collected either during workflow approvals, or after approval using the 'Route for Internal Signatures' button.

Note that the actual signature field(s) which appear in the document are determined by your configurator, clause, and rule setup, and not necessarily the Signature list.

Internal Contacts List   Personalize | Find | View All | 🗷 | 🏢   First ◄ 1 of 1 ► Last

Collaboration Settings | Signing Settings

*User	Description	Collaborator	Edit/ Check In	Collaboration Status	Collaborated On	
🔍		☐	☐	Initial		➕ ➖

OK   Cancel

2. Select the **Collaboration Settings** tab

Note that the actual signature field(s) which appear in the document are determined by y
Signature list.

Internal Contacts List

Collaboration Settings | Signing Settings

*User	Description	Collaborator

3. Enter the User ID
Manually enter the Collaborator's User ID or use the Look Up (magnifying glass) to locate it using the search options. The Description field will populate with the name of the User ID entered/selected.

list.

Internal Contacts List

Collaboration Settings | Signing Settings

*User	Description
R003621 🔍	Roxie Coble - 00061

❗ Best Practice: Verify that the user being set up as a collaborator has the required PeopleSoft access. PeopleSoft will allow users to be entered who do not have the appropriate access.

4. Select the security access
   for this Collaborator
   a. **For view access**
      only, select the
      Collaborator
      checkbox.
   b. **For edit access**, select
      the **Collaborator** and **Edit/Check In** checkboxes.

ion	Collaborator	Edit/ Check In	Collaboration Status
ble - 00061	☑	☑	Initial

Adding or Removing Collaborators

Click **Add (+)** to insert an additional
Collaborator and repeat steps 3 and 4.

Click **Delete (-)** to remove a Collaborator.

or	Edit/ Check In	Collaboration Status	Collaborated On		
	☐	Initial		+	−

5. Click **OK**

   The screen will return to
   the Document Management
   page.

Collaboration Settings | Signing Settings

*User	Description	Collaborator	Edit/ Check In	Collaboration Status	C
R003621	Roxie Coble - 00061	☑	☑	Initial	

OK   Cancel

Launch Internal Collaboration

WATCH IT!

1. Click **Route Internally**

t Options: Review and Approval:
Original Document   Route Internally
Amendment File   Preview Approval
Amendment File   Perform Clearance Checks
emental Documents   Bypass Approvals
odification Summary   Internal Contacts/Signers
rsion History   External Contacts/Signers
                                    Clearance Check

The Internal Contacts/
Collaborators page will
open for review.

> Collaborators may be
> added or removed from
> this page. The access for
> each Collaborator can also
> be changed.

Internal Contacts / Collaborators

SetID: STIND   Contract ID: 000000000000000000000015046
Vendor: FA WILHELM CONSTRUCTION CO INC

Internal Contact Details — Personalize | Find | View All | First

	*User	Description	Collaborator	Can Edit During Collaboration	Collaboration Status	Date Time
1	R003621	Roxie Coble - 00061	☑	☑	Initial	

Collaboration Instructions

Collaboration Comments

Save   Route Internally   Return to Document Management

2. Enter instructions
    or comments for the
    Collaborator(s) in the
    Collaboration Instructions
    field

	*User	Description	Collaborator	Can Edit During Collaboration	Collab Status
1	R003621	Roxie Coble - 00061	☑	☑	Initial

Collaboration Instructions

Collaboration Comments

3. Click **Route Internally**
    An email will be sent
    to all the contact(s)
    requesting collaboration.
    If there is more than one
    Collaborator, they will
    access the SCM Contract
    Document in a "first come,
    first served" basis.

| 1 | R003621 | Roxie Coble - 00061 | ☑ | ☑ |

Collaboration Instructions

Collaboration Comments

Save   Route Internally   Return to Document Management

The Document Management Page will open.

Sponsor:		Department:	039095	DOA - Procurement - Admin Svcs

Amendment:	5	Created On:	10/03/16 12:00AM	Document Details
Version:	2.02	Amended On:	12/06/16 10:57AM	
Status:	Pending Collaboration ❶	Last Modified On:	12/20/16 10:36AM	

Includes Imported Document

▶ **Collaboration Comments** ❷

View and Edit Options:
View Original Document
View Amendment File
Modify Supplemental Documents

Review and Approval:
Cancel Collaboration ❸
Modify Collaboration ❹
Internal Contacts/Signers

Other Document Actions:
Import Prior Document
Generation Log

❶ **Once Internal Collaboration has been routed, the Document status will be Pending Collaboration.**

❷ **Click the Expand icon to open the Collaboration Comments section if collapsed.**

❸ **Collaboration may be canceled at any time by the Contract Administrator. Canceling will remove all Collaborators and associated comments.**

❹ **Collaboration may be modified if additional Collaborators are necessary or additional comments/instructions are required. Collaborators can be added, but Collaborators who are pending cannot be deleted.**

PeopleSoft Email Notifications

PeopleSoft will send notifications throughout the SCM process.

Below is an example of an email a Collaborator may receive.

Tue 12/13/2016 12:56 PM

XXAHackett@idoa.IN.gov

Collaboration Review Invitation for Document "000000000000000000015033"

To   Thayer, Jessica (IDOA)

Enterprise Vault   + Get

Your collaboration is requested for Document "000000000000000000015033".

Set ID/BU: STIND
Document: 000000000000000000015033
Contract Description: 061 non skid shoes
Amendment: 0
Document Owner: Hackett, Angelina - 00061

Instructions:

You can navigate directly to the page by clicking the link below.

https://devfs853.gmis.in.gov/psp/fs91qa2_2/EMPLOYEE/ERP/c/CONTRACT_MGMT.CS_DOC_MAINT.GBL?Page=CS_DOC_MAINT&Action=U&CS_DOC_ID=1001887

If email notifications and/or worklist access is desired, **Email User** and/or **Worklist User** must be selected under Workflow Attributes in "My System Profile".

Workflow Attributes ❓

☑ Email User   ☑ Worklist User

Main Menu >> My System Profile

Verify that the correct email address is listed.

Primary Email Account	Email Type	Email Address
☑	Business	xxJWerner@idoa.IN.gov

Finalize Internal Collaboration

An email notice is sent to the Contract Administrator when the last Collaborator clicks "**Mark as Reviewed**".

1. Access the SCM Contract Document's Document Management Page using one of the following methods:

   a. **Email Hyperlink**
   Click the **hyperlink** provided in the email notification.
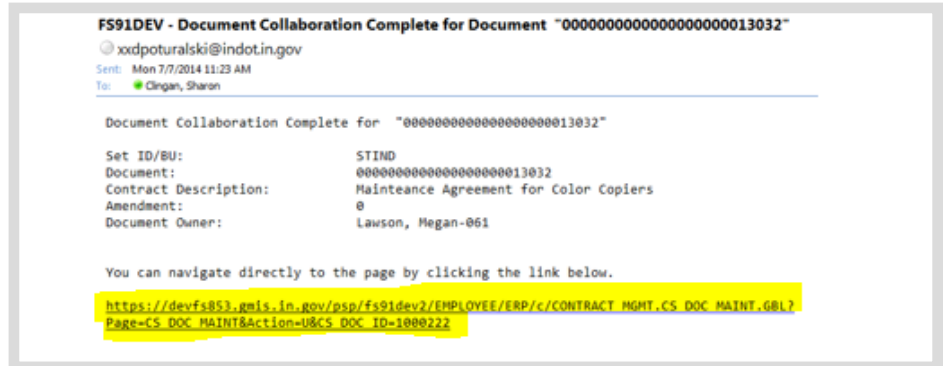
   b. **Worklist**
   Click the **hyperlink** to access the collaboration item (will be marked as "Collaboration Complete").
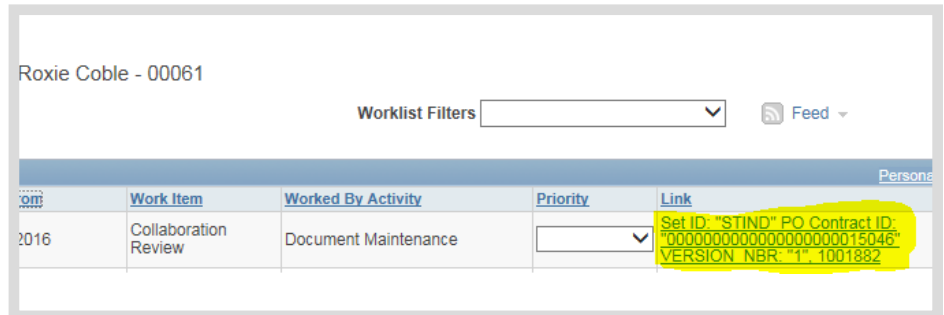
   c. **Navigation**
   Main Menu >> Supplier Contracts >> Create Contracts and Documents >> Contract Entry.

   Click **Maintain Document** after locating the appropriate SCM Contract Document.
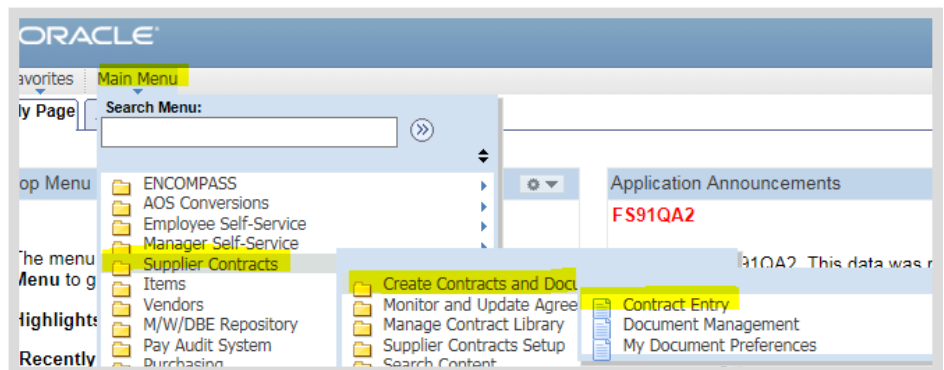
2. Review Collaboration
    Comments

Includes Imported Document

This document is ready for final review. Please review and accept any changes made by the collaborators and then press the Fin

▼ Collaboration Comments

[Roxie Coble - 00061 2016-12-20-10.42.26.000000]
This looks great. Please proceed with processing.

Add Collaboration Comments
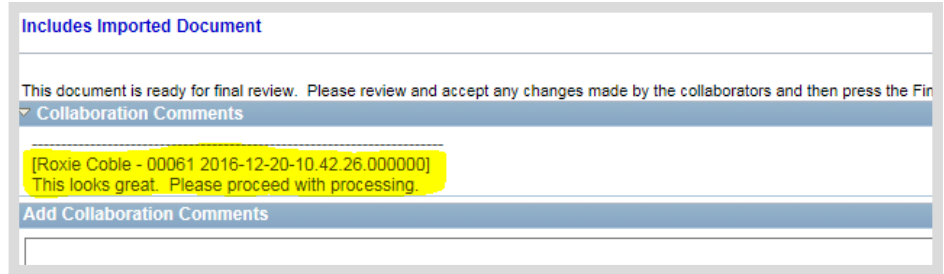
3. Click **Edit Amendment File**

    ❗The Contract Administrator
    must accept/reject the
    changes as appropriate. The
    Text Contract Document should
    represent the version that will
    be prepared for signature. When finished, save and check the Text Contract Document in. (See Review/Edit the
    Text Contract Document Phase4-5).

View and Edit Options:

| View Original Document |

| View Amendment File |

| Edit Amendment File - |
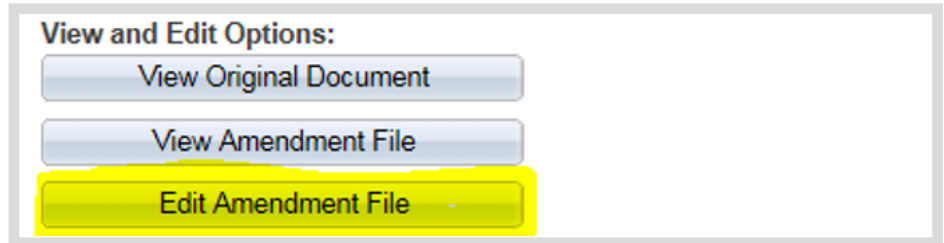
4. Click **Finalize Collaboration**

    ❗If needed, additional
    collaboration can be set up,
    launched and finalized.

Amendment:	5
Version:	2.02
Status:	Collaborated, Pending Review

| Finalize Collaboration |

Includes Imported Document
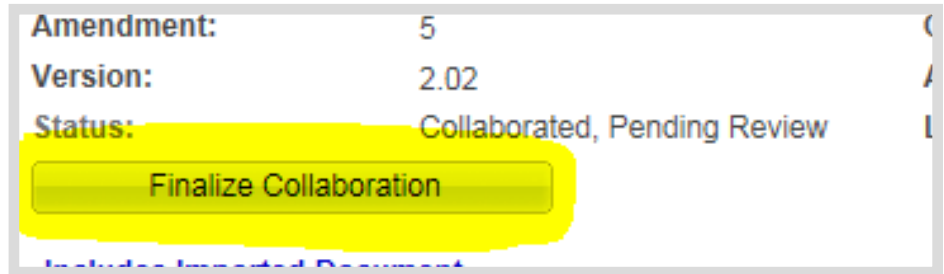
Recreate Document (If Necessary)

Use the Recreate Document process to:

- rebuild the Text Contract Document completely
- correct the Document Type
- update answers to wizard questions
- return to the boilerplate template

1. Click **Recreate Document**
   The Recreate Document
   Options window will open.

te Internally		Send to Contacts
ew Approval		**Recreate Document**
Jlearance Checks		Prepare Document for Signing

2. Update Amendment
   Configurator ID (if
   applicable)

| Amendment Option: | Amendment Files Only ▾ |
| Amendment Configurator ID: | SOI_AMEND_IMPORT 🔍 |

3. Update response to IOT
   approval question

   ❗ Leave the Version as defaulted.

   Does this contract require IOT approval? ▾

   Version: ○ Same Version (1.01)
   ⦿ Minor Version (1.02)
   ○ Major Version (2.00)

4. Enter Comments (if
   applicable)

   *Comments: Document Recreated:

5. Click **OK**
   A pop-up will open.

   OK   Cancel

6. Click **Yes**
   Continue to confirm previous wizard answers and make changes as necessary to rebuild the Text Contract
   Document.

Warning: This will recreate this document. (10421,84)

ALL manual edits made to this document will be lost when the document is recreated. Are you sure you want to continue to recreate this document?

   Yes   No

Step 7: External Signer Set Up

To set up the External Signer, the Contract Administrator must have the person's first and last name. In addition, the SCM electronic signature process requires that every company has completed Bidder Registration Part 1 (Collect the Required Materials) and Part 2 (Request New Profile Creation) in PeopleSoft. The resulting User ID and password is necessary for the External Signer to access SCM Contract Documents prepared for signature through the State's Supplier Portal.

This process covers finding an existing User ID or creating one if necessary for the External Signer.

Find the Bidder ID through the Bidder File	Find the Bidder ID through the Vendor ID	Identify Existing Signer's User ID
Complete Steps on Phase4-21	Complete Steps on Phase4-22	Complete Steps on Phase4-23
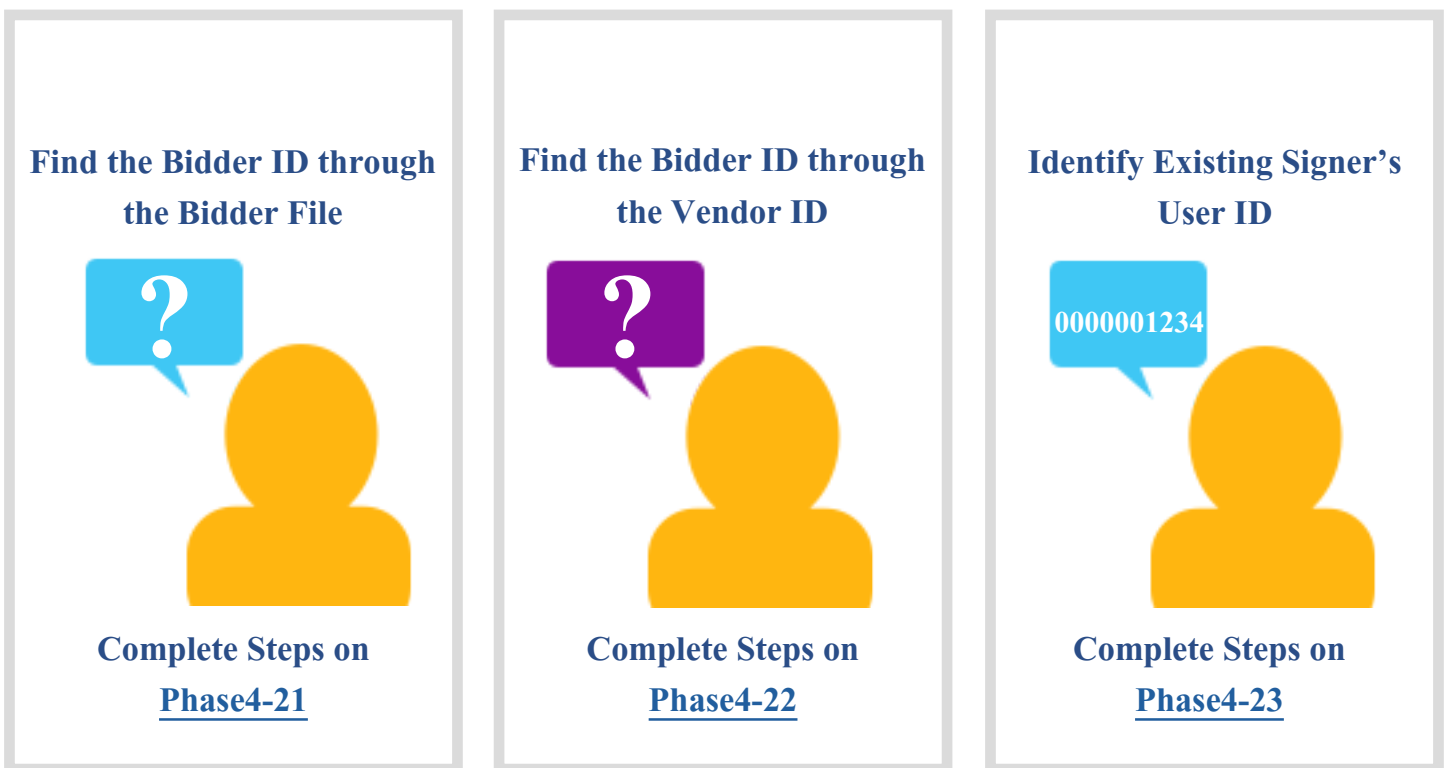
Find the Bidder ID through the Bidder File

Use this process to search for Bidder information.

1. Navigate to the Bidder information

   Main Menu >> Sourcing >> Bidder Information

   ! View access can be granted by submitting a GMIS issue.
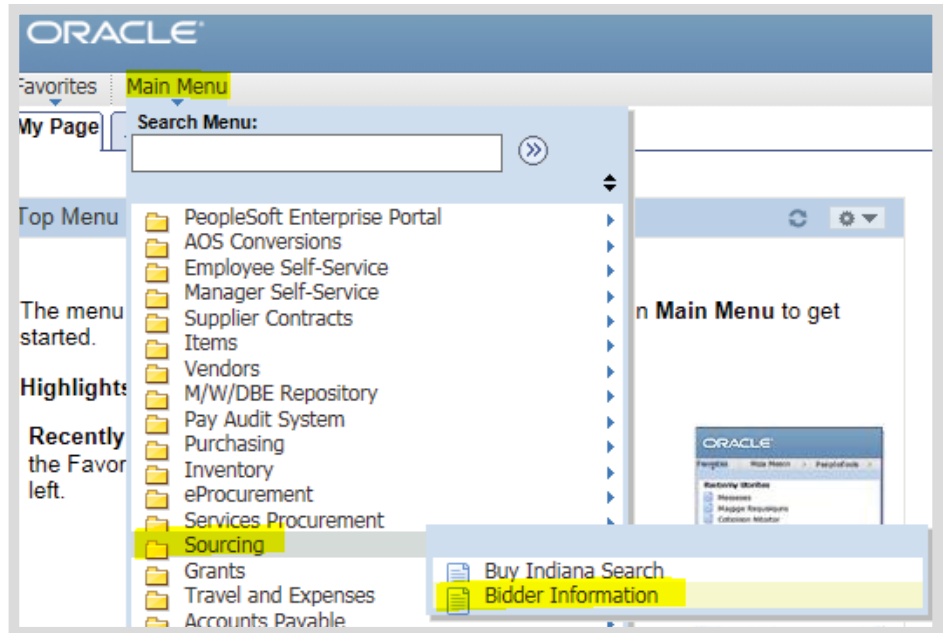
2. Enter search criteria
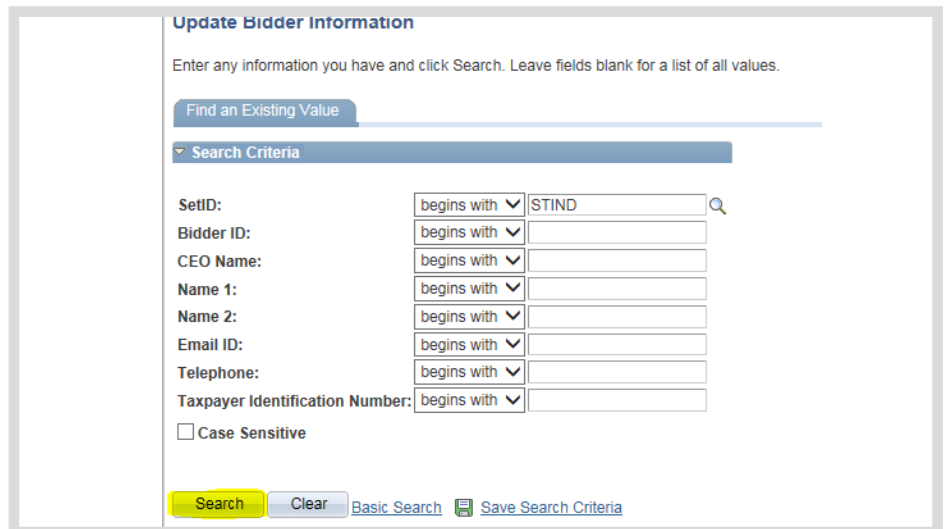
3. Click **Search**

   Click anywhere on the row of the desired bidder

4. Select the **Header** tab
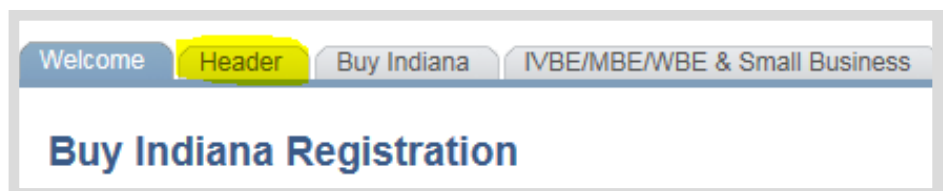
5. Note the ten digit Bidder ID

   In most cases, the person listed under CEO Name will be the EXTxxxxxxxxx external signer (in this example EXT0000030443).

   ! If there is not a Bidder ID, the Contract Administrator must request the vendor complete Part 1 and Part 2 of the Bidder Registration at www.in.gov/idoa/2464.htm.
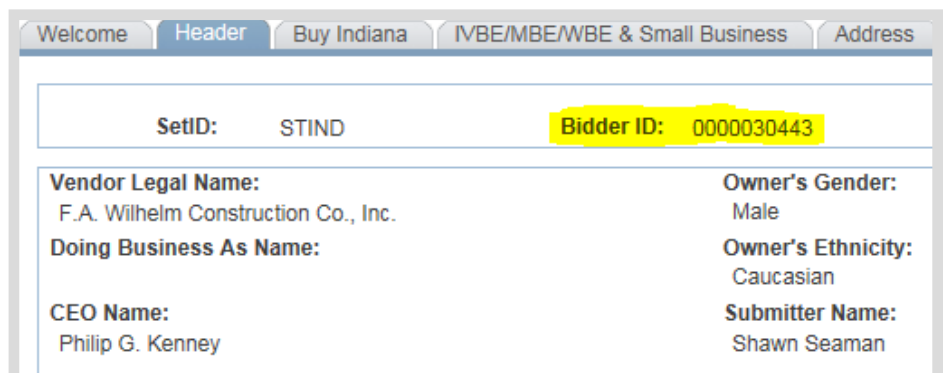
Find the Bidder ID through the Vendor ID

Use this process when the Vendor ID is known/available, but the Bidder ID is not.

1. Copy the Vendor ID from the Transactional Contract Document

2. Navigate to the vendor file
   Main Menu >> Vendors >> Vendor Information >> Add/Update >> Vendor

   ! View access can be granted by submitting a GMIS issue.

3. Enter the Vendor ID as search criteria

4. Click **Search**

5. Select the **Profile** tab

6. Note the ten digit Bidder ID

   ! If there is not a Bidder ID, the Contract Administrator must request the vendor complete Part 1 and Part 2 of the Bidder Registration at www.in.gov/idoa/2464.htm.

Identify Existing External Signer's User ID

It is possible that the designated External Signer may have already been issued his/her own unique ID and password associated with the Bidder ID.

1. Click **Add External User**

Clearance Check
Add External User

2. Enter Bidder ID
   (10 Characters) **or** Click **Look Up (magnifying glass)** to search for the Bidder ID.

Create External User For Electronic Signature
Bidder ID To Copy: 0000030443

3. Tab Out or Click in the User Name field
   This allows PeopleSoft to provide the user name tied to the Bidder ID.

Create External User For Electronic Signature
Bidder ID To Copy: 0000030443   Philip G. Kenney
F.A. Wilhelm Constr

4. Review the existing External Signers tied to the Bidder ID

   a. **If the External Signer's name appears next to the magnifying glass,** note the Bidder ID. Do not create a new signer.

   Create External User For Electronic Signature
   Bidder ID To Copy: 0000030443   Philip G. Kenney
   F.A. Wilhelm Constr

   b. **If the External Signer's name and Email ID appear in the Existing External Signers table,** note the User ID . (Example: EXS0000000911) Do not create a new signer.

3	EXS0000000873	Kelly Garrett
4	EXS0000000889	Patricia Burdine
5	EXS0000000891	Chris Gibson
6	EXS0000000911	Sabrina Duncan

   ! Check all pages of the Existing External Signers table. If there are duplicate entries, submit a GMIS issue to request removal.

   ! If the External Signer's name does not appear click **Cancel**, see Creating a New External Signer to create a new signer.

5. Click **OK**

   OK   Cancel

6. Continue to Assign the Signer

STOP

Do not complete this process if the External Signer was identified on Phase4-23.
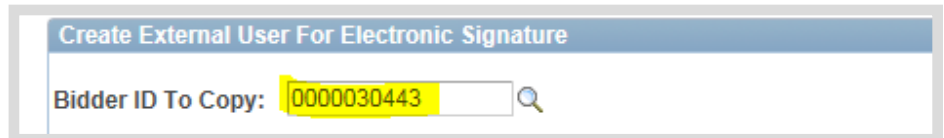
WATCH IT!

Creating a New External Signer

If the External Signer's name did not appear during the Identify Existing External Signer process, a User ID must be created. The External Signer's first and last name and email address are required for this process.
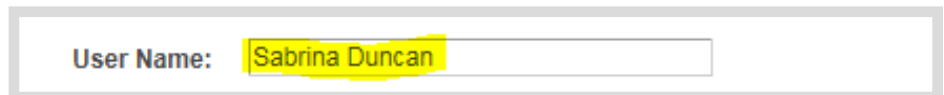
1. Click **Add External User**

   Clearance Check
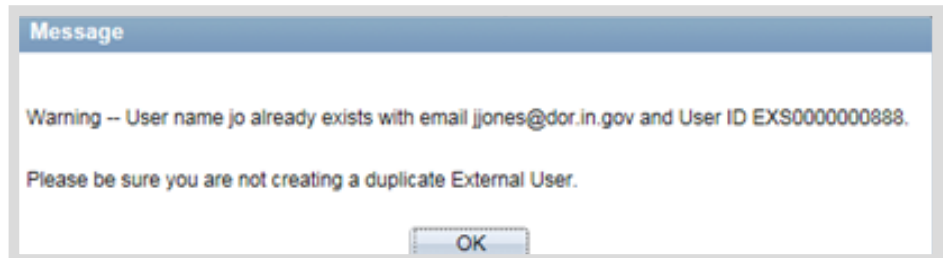   Add External User

2. Enter Bidder ID
   (10 Characters)

   Create External User For Electronic Signature
   Bidder ID To Copy: 0000030443

3. Enter the signer's first and last name
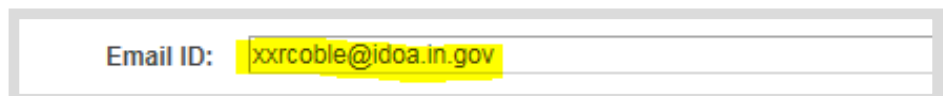
   User Name: Sabrina Duncan

   ⚠ A warning will appear if an External Signer's name is a duplicate. The original User ID will be given as well as a request to not create a new External Signer.

   Message

   Warning -- User name jo already exists with email jjones@dor.in.gov and User ID EXS0000000888.

   Please be sure you are not creating a duplicate External User.

   OK

4. Enter the signer's email address

   Email ID: xxrcoble@idoa.in.gov

5. Click **Create New User**
   The page will refresh and display the assigned User ID and password in red. An email notification will be sent to the signer providing the User ID and initial password.

   Create New User

   ⚠ Do not leave the page until a new User ID populates.

6. Note the New User ID

   e New User

   New User ID: EXS0000000911
   Password:

7. Click **OK**

   OK   Cancel

Assign the External Signer

The External Signer identified (new or existing), must be assigned as an external contact in order to sign the SCM Contract Document. Multiple users may be set up as external contacts for collaboration or review, but only one can be designated as the signer.
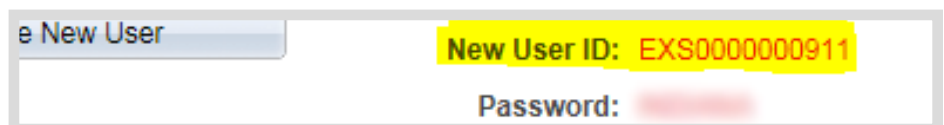
1. Click **External Contacts/Signers**

   The External Contacts page will open.

   > External Contacts/Signers
   > Clearance Check

2. Enter the External Signer's User ID in the External User field (EXT or EXS number)

   a. Enter "EXT" before the 10 digit Bidder ID number noted from step 4a of Identify Existing External Signer. (Example: EXT0000030443)

   b. Enter the User ID noted from step 4b of Identify Existing External Signer. (Example: EXS0000000835)

Contact ID:	1
External User:	EXS0000000911
Contact Name:	
Contact Title:	

   c. Enter the User ID noted from Creating a New External Signer on Phase4-24. (Example: EXS0000000911)

3. Tab Out or Click in the Contact Name field

   The signer's name will populate to the right of the field.

   > If the signer's name is spelled incorrectly, submit a GMIS issue. Do not create another External User ID.

4. Enter the signer's name in the Contact Name field

   The email address for the signer will default based on the User ID.

Contact ID:	1
External User:	EXS0000000911 🔍 Sabrina Duncan
Contact Name:	Sabrina Duncan
Contact Title:	
Email ID:	xxrcoble@idoa.in.gov

   > If the email address does not populate, submit a GMIS issue. Do not create another External User ID.

5. Select the **Allow Document View Access**, **Primary Document Owner** and **Required to Sign Document** checkboxes

   - ☑ Allow Document View Access
   - ☑ Primary Document Owner
   - ☑ Required to Sign Document

More than 1 External User (Non-Signer)

Click **Add (+)** to designate additional contacts. The **Primary Document Owner** and **Required to Sign Document** checkboxes will not be available for these users.
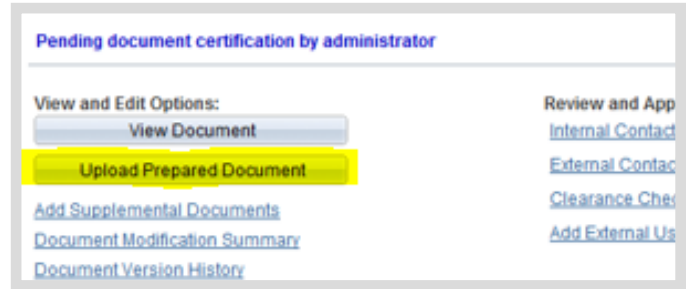
of 1 ▶ Last

➕ ➖

---

6. Click **OK**

   [OK]   [Cancel]

Step 8: Prepare Document for Signing

1. Click **Prepare Document for Signing**

   The Prepare Document for Signatures page will open.

Route Internally	Send to Contacts
Preview Approval	Recreate Document
erform Clearance Checks	Prepare Document for Signing
Bypass Approvals	Import Prior Document

2. Review the External list of Signers and verify the correct person has been designated

   a. **If the list is not correct,** click **Cancel** and return to the external contact list to make any revisions necessary.

   b. **If the list is correct,** proceed to step 3.

   External List of Signers

   Contact Name

   Sabrina Duncan

3. Click **OK**

   When the processing is complete, there will be two pop-up messages. It does not matter which one the Contract Administrator answers first.

   OK   Cancel

4. Click **OK**

   to the usage rights for Adobe Reader pop-up message.

   Message

   You need to enable the usage rights for Adobe Reader (10421,197)

   Before the file can be signed by others, you need to enable the usage rights for Adobe Reader.

   Please enable this in the document that was launched, save the document and upload it back into the system. The document will remain checked out in your name until yo

   OK

5. Click the **drop down arrow** to the right of Save

   evfs853.gmis.in.gov?   Open   Save ▼   Cancel

6. Select **Save As**

7. Select location to save file

   | Do not change the file name or file extension (PDF) and remember where it is saved.

   - Documents
   - Music
   - Pictures
   - Videos
   - Computer

   File name: STIND_000000000000000000015046_2

   Save as type: Adobe Acrobat Document

   Hide Folders   Save   Car

8. Click **Save**

9. Click **Open**

10. Verify that the SCM Contract Document is correct.

    Check that all modifications have been appropriately accepted or rejected.

    ! If the SCM Contract Document does not represent the version that will be prepared for signature and changes need to be made,
    - cancel the signature process
    - edit Text Contract Document
    - accept and/or reject modifications
    - prepare SCM Contract Document for signing

11. Close the SCM Contract Document

The Document Management page will now indicate that the SCM Contract Document has been checked out and is pending document certification by the Contract Administrator.

Step 9: Upload the Prepared Document

After the SCM Contract Document has been prepared for signing, the current format must be uploaded so that it can be circulated for electronic signatures.

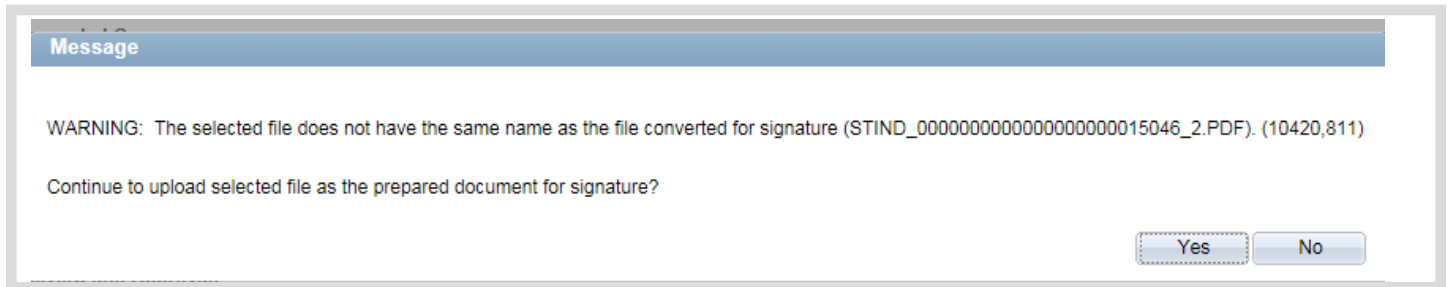1. Click **Upload Prepared Document**
   A pop-up window will open.

   Pending document certification by administrator

   View and Edit Options:
   - View Document
   - Upload Prepared Document
   - Add Supplemental Documents
   - Document Modification Summary
   - Document Version History

   Review and App...
   - Internal Contac...
   - External Contac...
   - Clearance Che...
   - Add External Us...

2. Click **Browse**
   Search the network file directories and locate/select the saved SCM Contract Document.

   Upload Amendment File   ? Help

   C:\Users\jwerner\Desktop\STIND_00000000000000000   Browse...
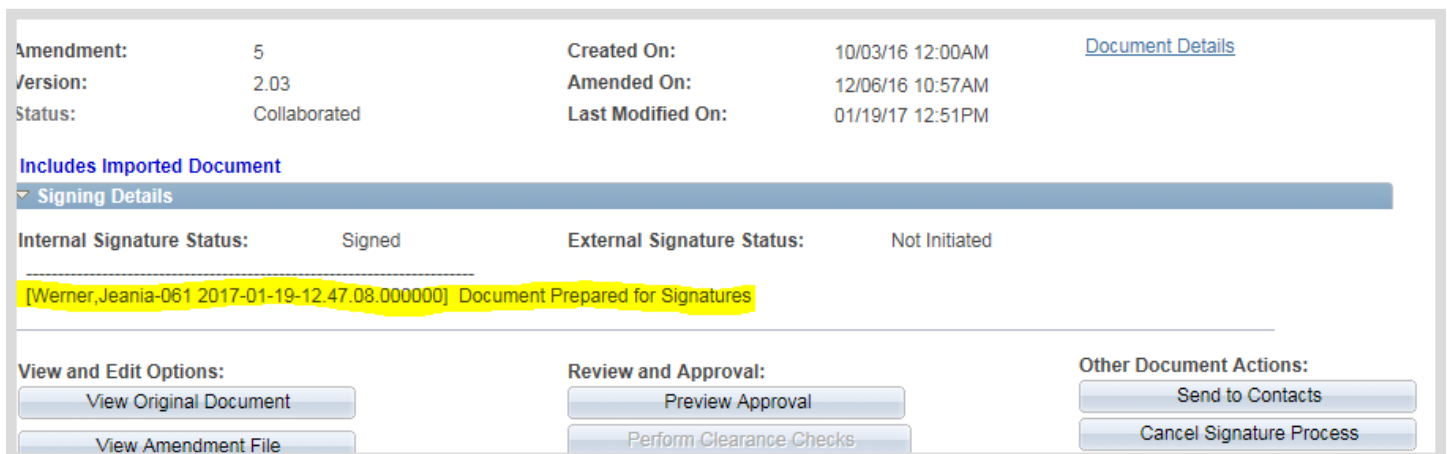
   Upload   Cancel
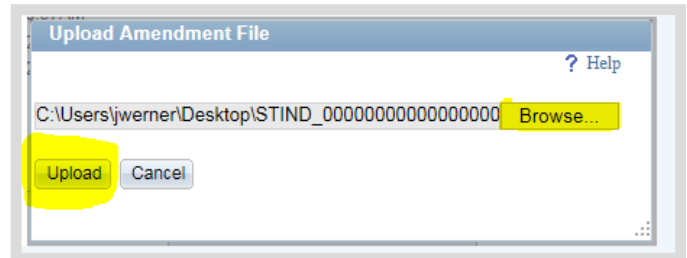
3. Click **Upload**

   ! If the SCM Contract Document was saved under a different title other than what was system-generated, the following warning message will appear in a pop-up window. As long as it is the correct SCM Contract Document, there is no reason to be concerned. Click **Yes**.

   Message

   WARNING: The selected file does not have the same name as the file converted for signature (STIND_00000000000000000000015046_2.PDF). (10420,811)

   Continue to upload selected file as the prepared document for signature?

   Yes   No

Once the prepared SCM Contract Document has been uploaded, the Document Management page will update and display the current status in the Signing Details section.

Amendment:	5	Created On:	10/03/16 12:00AM	Document Details
Version:	2.03	Amended On:	12/06/16 10:57AM	
Status:	Collaborated	Last Modified On:	01/19/17 12:51PM	

Includes Imported Document

Signing Details

| Internal Signature Status: | Signed | External Signature Status: | Not Initiated |

[Werner,Jeania-061 2017-01-19-12.47.08.000000] Document Prepared for Signatures

View and Edit Options:
- View Original Document
- View Amendment File

Review and Approval:
- Preview Approval
- Perform Clearance Checks

Other Document Actions:
- Send to Contacts
- Cancel Signature Process

Step 10: Send the SCM Contract Document for External Signature

WATCH IT!
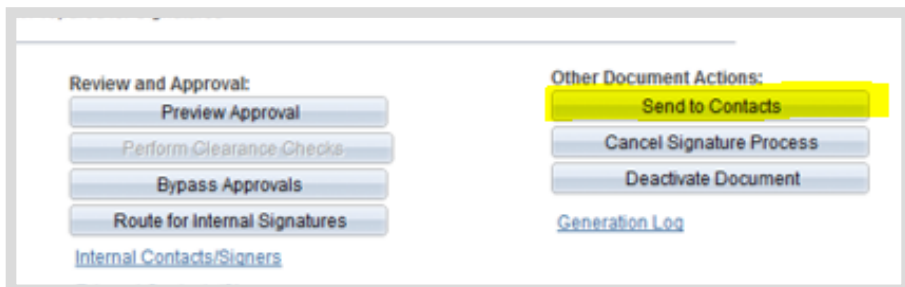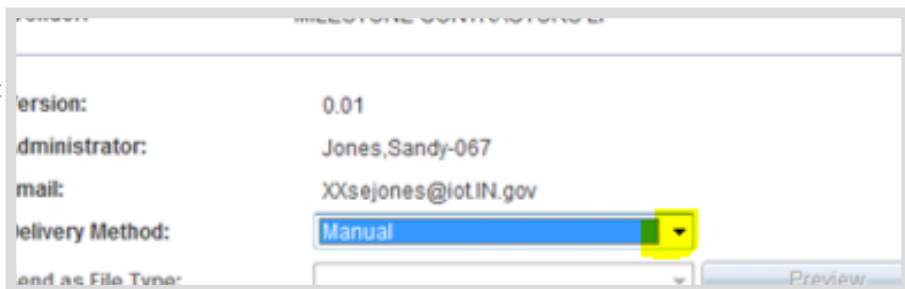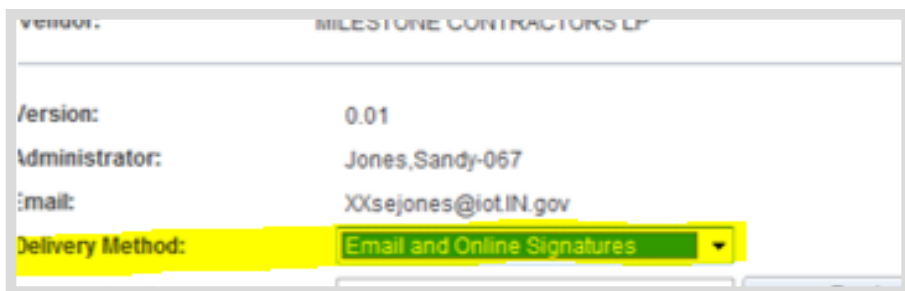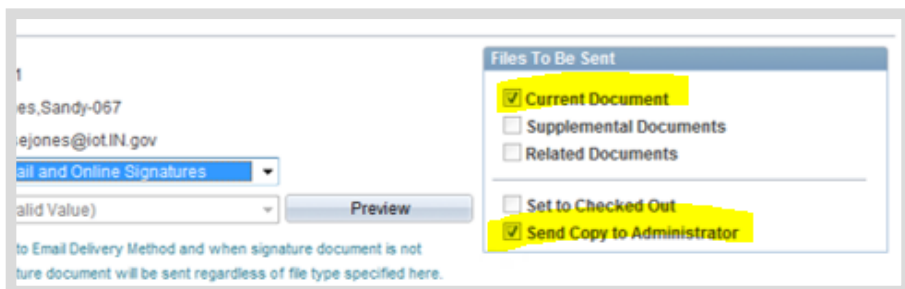
1. Click **Send to Contacts**

   ! If **Send to Contacts** is not displayed, check the External Contact set-up and make certain that **Required to Sign** is selected.

2. Click the **drop down arrow** next to the Delivery Method field

3. Select **Email and Online Signatures**
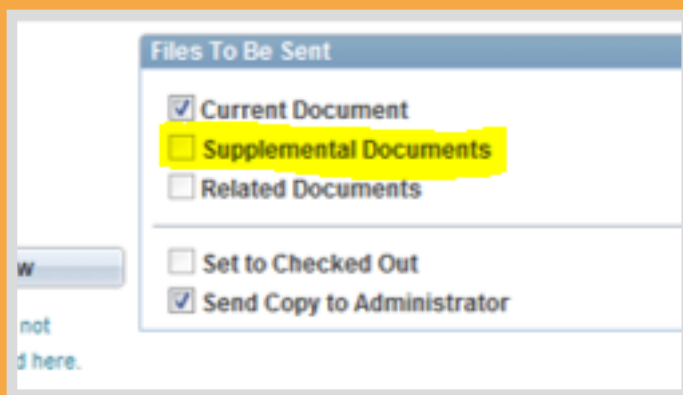   This will automatically check the **Current Document** and **Send Copy to Administrator** checkboxes in the Files to Be Sent section.

   ! The Current Document can be unchecked so a copy is not emailed to the External Signer. This removes the 25MB file size limitation caused by Outlook.

Sending Supplemental Documents to External Contacts

To send Supplemental Documents to an External Contact the following must be completed:

a. The **Allow Email Dispatch** checkbox was checked; *see Supplemental Documents section*

b. The **Supplemental Documents** checkbox must be checked - Verify the documents listed in the Supplemental Documents section are intended to be sent to the External Signer. Uncheck the box next to the file name if the file is not to be sent.

Subject:

Documents for Review/Signature - Contract ID: 00000000000000000013187 **❶**

Description:

Dear CIBER,

Contract 00000000000000000013187 For Carpet Cleanin **❷**

Contacts		
Selected	**Contact ID**	**Name**
☑	1	Megan Fields

Select All Contacts   Clear All Contacts

Dear Aquatic Weed Control,

Contract 00000000000000000018515 For 061 aquatic weed control with the State Of Indiana has been prepared and is ready for your review and electronic signature. Please use the Fill & Sign; Add Text or Sign feature to sign.   PLEASE DO NOT USE A DIGITAL CERTIFICATE FOR SIGNING as it locks the contract when uploaded and prevents the State from signing the document internally.

Before logging in, please review the Step-by-Step instructions for electronically signing the contract at http://www.in.gov/idoa/2977.htm.

To access the contract, the URL/link below will direct you to the Supplier Portal where you'll be required to log in with your User ID (EXT0000009606) and Password.

https://devfin.gmis.in.gov/psp/fs91dev/SUPPLIER/ERP/c/CONTRACT_MGMT_SUPPLIER.CS_DOC_SUPP.G BL?Action=U&CS_DOC_ID=1005081

If you need help with your Password or are unable to log in, click below to request assistance:

https://fs.gmis.in.gov/psc/guest/EMPLOYEE/ERP/c/SOI_CUSTOM_APPS.SOI_GMIS_ISSUE.GBL

---

❶ The Subject field will default and will include the Contract ID number. The Subject can be modified if necessary.

❷ The Description field will default; the Description can be modified if necessary. Do not change the links to the following: the Vendor eSigning guide, the Supplier Portal, and the Password reset option.

4. Review the External Signer's email address

> If there is an error, make the correction and submit a GMIS issue to update the External Signer's email address.

Im Construction Co., Inc.,

00000015046 For Consulting with the State Of Indiana has been prepared and is ready for your review and electronic

Personalize | Find | 📷 | 🛗 First 🔄 1

	Name	**Title**	**Email ID**	**Description**
	Sabrina Duncan		rcoble@idoa.in.gov	Ad Hoc Contact

Clear All Contacts

5. Click **OK**

Select All Contacts   Clear All Contacts

[OK]   [Cancel]

An email notification will be sent to the Contract Administrator and External Signer to let them know an SCM Contract Document is ready for review/signature. A PDF version is attached to the email if the Contract Administrator left the "**Current document**," checkbox selected.

The Document Management page will update displaying the status as **Pending Supplier's Signature**

Version:	2.03	**Amended On:**	
Status:	Collaborated	**Last Modified On:**	

[Cancel Supplier Signing]

Includes Imported Document

** Pending Supplier's Signature **

▽ **Signing Details**

Internal Signature Status:	Signed	**External Signature Sta**

[Werner,Jeania-061 2017-01-19-13.02.52.000000] Sent to Supplier for Signatures

If the External Signer has trouble with the eSigning process, direct him/her to the eSigning Electronic Contracts web page: www.in.gov/idoa/2977.htm and help walk him/her through the steps. If there is still an issue, have him/her submit a GMIS issue.

Vendor eSigning a Contract

A vendor will digitally sign the SCM contract once the State's contract administrator has completed the final version of the contract document.

Training | Launch
This 10 minute video will walk through the steps for a vendor to eSign a contract.

Vendor eSigning a Contract Manual | (.pdf)

Troubleshooting Guide | (.pdf)

When the External Signer has reviewed, signed, and uploaded the signed SCM Contract Document, the Contract Administrator will receive an email notification similar to the one below. Receipt of this message indicates that the SCM Contract Document is ready for Internal signature. The SCM Contract Document may be accessed through the link in the email or from the PeopleSoft Main Menu.

Enterprise Vault   + Get more apps

The Supplier has signed the following document:

Document: 0000000000000000000015046
Description: 061 Consulting

URL:
https://fs85.gmis.in.gov/psp/fs91prd/EMPLOYEE/ERP/c/CONTRACT_MGMT.CS_DOC_MAINT.GBL?Action=U&CS_DOC_ID=1001882

Canceling the Supplier Signing Process   WATCH IT!

If it becomes necessary for any reason to stop the signature process before it is complete, click Cancel Supplier Signing. It can be sent again at any time by repeating the steps in this section. Otherwise,

a. **Verify the External Signer has signed correctly**
   If the External Signer signs using encryption, the Contract Administrator cannot take further action. The Contract Administrator will need to cancel the signature process and request the External Signer to sign the SCM Contract Document correctly.

b. **Verify the External Signer did not change the file name**
   If the External Signer changed the file name, this will cause system issues. The Contract Administrator will need to cancel the signature process and request the External Signer to sign the SCM Contract Document correctly using the appropriate file name.

c. **Verify the External Signer did not change the content**
   If the External Signer changed the content, the Contract Administrator will need to cancel the signature process and request the External Signer sign the SCM Contract Document as prepared.

Administrator: Jones,Sandy-067

Sponsor:

Version: 0.01
Status: Collaborated

Cancel Supplier Signing

** Pending Supplier's Signature **
Signing Details

Internal Signature Status: Signed

Step 11: Send the SCM Contract Document for Internal Signature

Main Menu >> Supplier Contracts >> Create Contracts and Documents >> Document Management

Once the External Signer has completed the eSigning process and the Contract Administrator has reviewed the contract for any errors, the SCM Contract Document is ready for Internal signature.

The next steps of this process are determined by who has authority to sign the SCM Contract Document. Choose the appropriate path.

If the Contract Administrator is the Internal Signer,

ADMIN

complete steps on

Phase4-33

If the Contract Administrator is not the Internal Signer,

ADMIN

complete steps on

Phase4-34 through Phase 4-36

Confirm with the intended signer that he/she has completed the Internal Signer training, has appropriate PeopleSoft access and is authorized to sign on behalf of the agency.

Sign the SCM Contract Document on the State's Behalf

1. Click **Sign Document (On Behalf)**

[Sharon Clingan 2014-07-07-14.11.09.000000] Document Prepared for Signatu

View and Edit Options:

View Document

Sign Document (On Behalf)

Add Attachments/Related Documents

Review and App

Previ

Submi

Bypas

2. Refer to the Internal eSigning a Contract manual (pages 4-8) for reference on completing the signature process: www.in.gov/idoa/files/PeopleSoftGuide_SCM_InternaleSigningContract.pdf.

Set up Internal Contacts/Signers

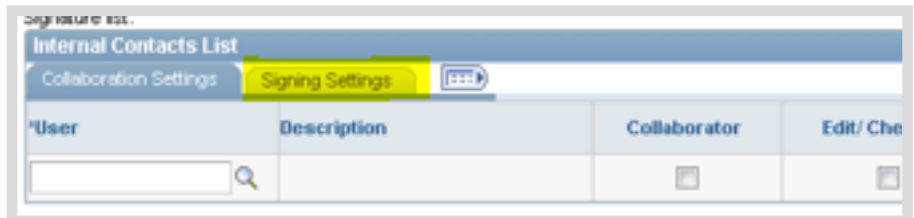1. Click **Internal Contacts/Signers**

The Internal Contacts List page will open.

2. Select the **Signing Settings** tab

3. Enter manually or use Look Up (magnifying glass) to select the Internal Signer's User ID.

4. Select the **Required to Sign Document** checkbox

5. Verify that the **Visible Signer** checkbox is checked

		Required to Sign Document	Visible Signer	Sign Order	Signing Title
Internal Contacts List					
Collaboration Settings	Signing Settings				
*User		Required to Sign Document	Visible Signer	Sign Order	Signing Title
J005563	🔍	☑	☑		

6. Click **OK**

*User		Required to Sign Document	Visible Signer	Sign Order	Signing T
J005563	🔍	☑	☑		

OK   Cancel

If the Internal Signer will also be the Fiscal Approver, nothing more is needed. The user will sign and approve in the same step when the SCM Contract Document is routed for approval.

If the Internal Signer is not included in the fiscal approval workflow, the SCM Contract Document must be routed for internal signatures separately.

Route for Internal Signatures

1. Click **Route for Internal Signatures**

Submit for Approval	Cancel Signature Process
Bypass Approvals	Deactivate Document
Route for Internal Signatures	Generation Log

The Route for Internal Signatures page will open for review.

! Internal Signers may be added or removed from this page. The access for each can be updated.

Route for Internal Signatures

Below is the list of users who are listed as collaborators/signers. Those marked as required to sign, who have not yet signed the document, will be routed an email/worklist in signing order to sign the document. Changes made here will be saved for the document, not just for this particular routing cycle. Since the document is already prepared for signatures, adding/removing users from this list will NOT automatically update any signature fields within the document.

SetID: STIND   Contract ID: 00000000000000000019953
Vendor: THE UNIFORM HOUSE

List of Signers   Personalize | Find | View All | 📷 | 🏫 | First ◀ 1 of 1 ▶ Last

*User	Description	Required to Sign Document	Visible Signer	Sign Order	Sign Status	Signed DTTM		
J005563 🔍	Werner,Jeania-061	☑	☑	1	Initial		➕	➖

Instructions:

2. Enter instructions or comments for the Internal Signer(s) in the instructions field

OK   Cancel

3. Click **OK**

An email will be sent to the designated Internal Signer.

The Contract Administrator will receive an email notification when the SCM Contract Document has been signed. Receipt of this message indicates that the SCM Contract Document is ready for remaining steps.

Document Internal Signature Loop Complete for Document "00000000000000000015046"

JWerner@idoa.IN.gov
Thu 1/19/2017 1:38 PM

To: Werner, Jeania;

Enterprise Vault

Document Collaboration Complete for "00000000000000000015046"

Setid/BU: STIND
Document: 00000000000000000015046
Contract Description: 061 Consulting
Amendment: 5

You can navigate directly to the page by clicking the link below.

https://fs85.gmis.in.gov/psp/fs91prd/EMPLOYEE/ERP/c/CONTRACT_MGMT.CS_DOC_MAINT.GBL?Action=U&CS_DOC_ID=1001882

To Correct Internal Signature Errors

If the Internal Signer needs to be changed because the SCM Contract Document was routed to the wrong person or the wrong person signed the SCM Contract Document, then cancel the signature process.

> A signature cannot be removed from a PDF file once it is uploaded in PeopleSoft. The Contract Administrator must send it again for external signature before re-routing for internal signature(s).

1. Click **Stop Internal Signatures**
   Enter Comment
   Click **OK**

2. Click **Internal Contacts/Signers**

   The Internal Contacts List page will open.
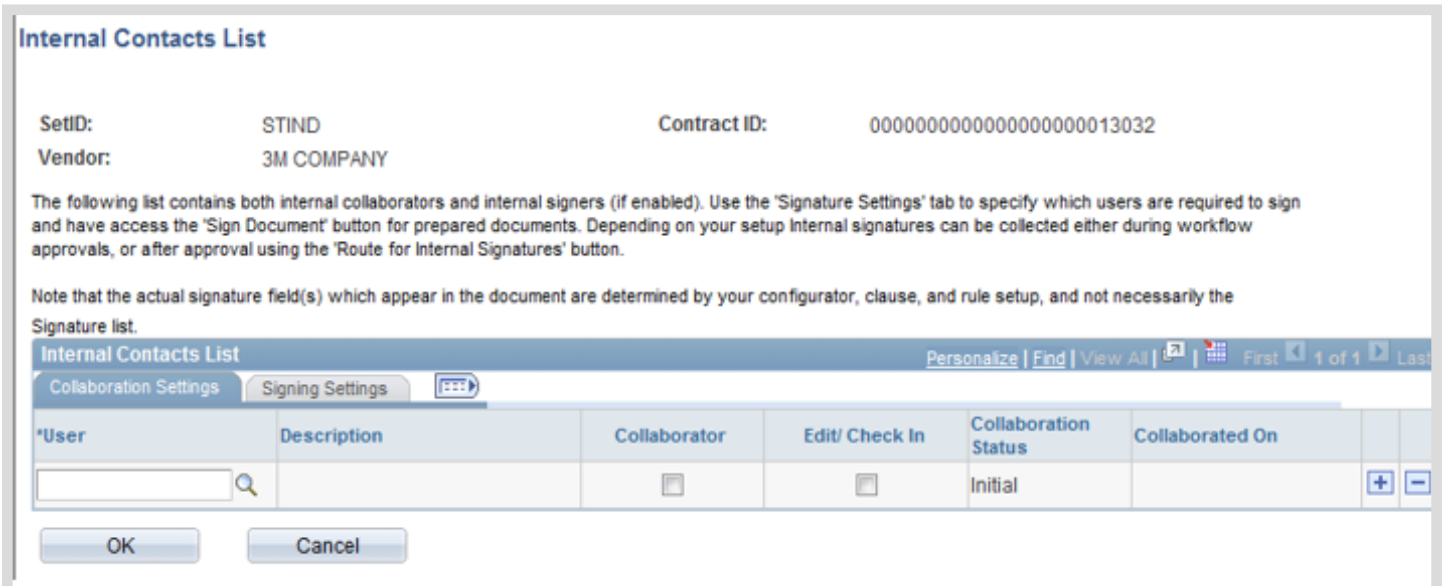
3. Select the **Signing Settings** tab

4. Click **Add (+)** to create a new row

5. Click **Delete (-)** on the row with the previous Internal Signer or uncheck the **Required to Sign Document** checkbox next to the User ID

6. Enter manually or use Look Up (magnifying glass) to select the Internal Signer's User ID.
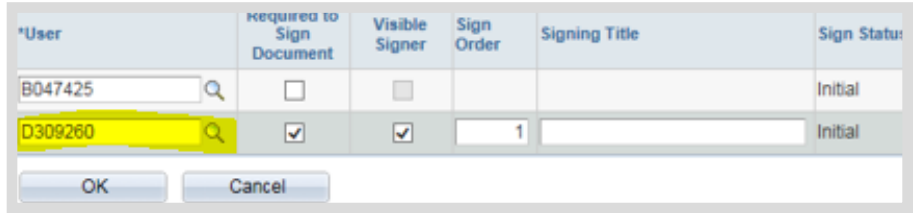
7. Select the **Required to Sign Document** checkbox
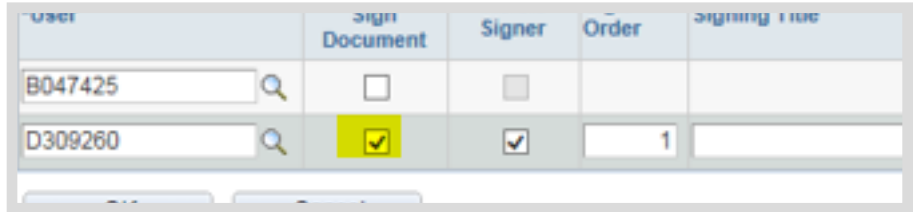
8. Verify that the **Visible Signer** checkbox is checked
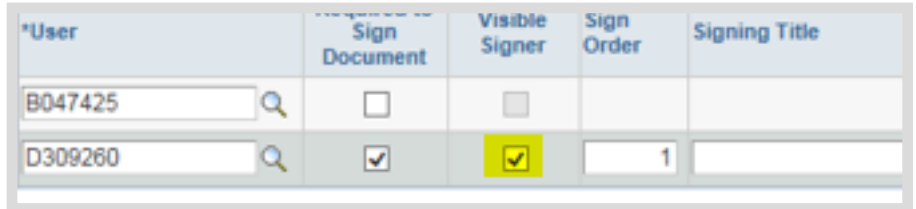
9. Click **OK**
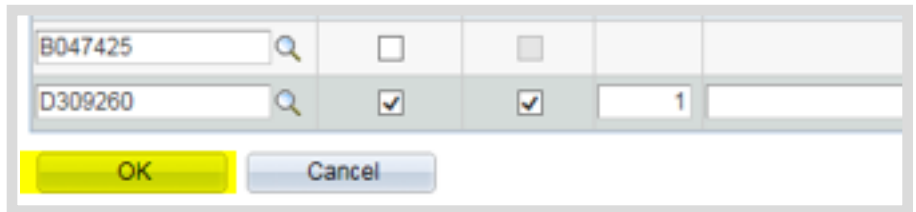
10. Click **Route for Internal Signatures** (See the Route for Internal Signatures section Phase4-35).
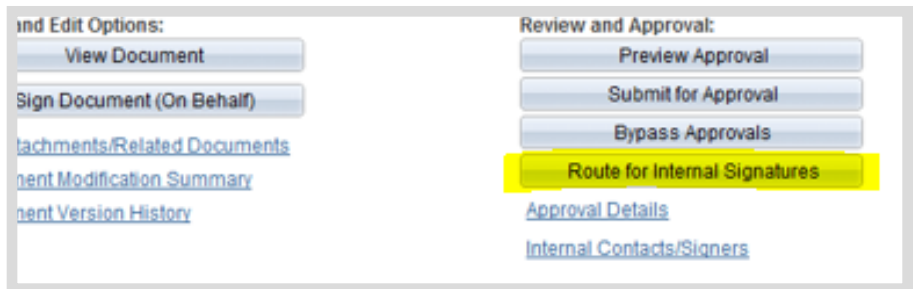
If the Internal Signer failed to Upload the signed PDF,

a. Click **"Recycle Sign Status to Initial"** within the Internal Contacts/ Signers page

b. Click **OK**

c. Click **Route for Internal Signatures** on the Document Management page See the Route Internal Signatures section Phase4-35
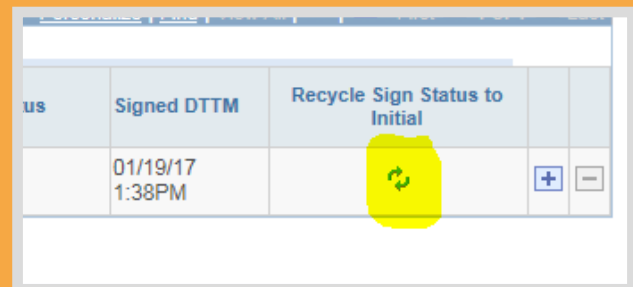
Step 12: Document Completion of Contract Clearance Checks

Before an SCM Contract Document is executed, the State requires the following:

1. That the vendor is in good standing with the Indiana Department of Revenue and the Department of Workforce Development.
2. The vendor must be registered with the Secretary of State's office (if required).
3. The vendor must not appear on the State or federal suspended vendor lists.

These checks and clearances are done outside of PeopleSoft SCM with the results documented manually. This process can be documented at any time but must be completed in order to proceed to Contract Approvals.

> ❗ Clearance Check results must be included as a supplemental document if they are required (see Phase4-10).

1. Click **Clearance Check**
   The Contract Clearance Checklist page will open

2. Use the checkboxes, radio buttons and date cleared fields to document clearance check procedures were followed

   > ❗ Click the **Clearance Check Not Required** checkbox if clearance checks are not required. An explanation must be provided in the Reason text field.

3. Click **OK**
   Returns to the Document Management page.
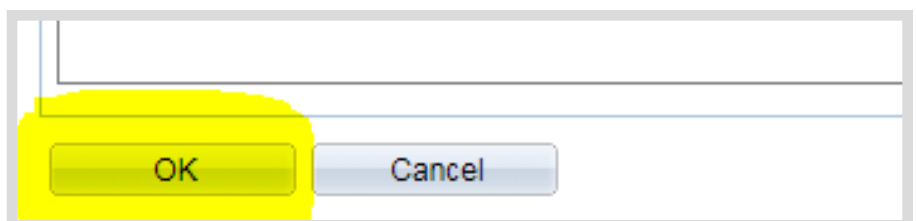
# Step 13: Send for SCM Contract Document Approvals (Workflow)

The oversight agencies (Indiana Office of Technology, State Budget Agency, Indiana Department of Administration, and Attorney General) that manually signed contracts in the paper-based procedures will approve electronically in SCM. The User ID of the Approver and the date/time of the approval will be recorded and documented (in the Document Version History) in lieu of a wet signature.

SCM Contract Documents may be submitted for oversight agency approvals when externally signed, internally signed, and the contract clearances have been documented.

If the Internal Signer is also an Approver within one of the oversight agencies, the SCM Contract Document may be signed and approved by that person in the workflow steps.

1. Click **Preview Approval**
   The Document Approval page will open detailing the required approval path.
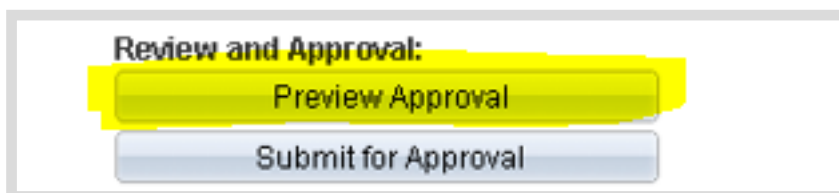

2. Review Approval Workflow
   If an approver is missing or should not be included, click **Return to Document Management** to exit the approval preview and submit a GMIS issue.

3. Click **Submit for Approval** to route the SCM Contract Document through workflow
   If it becomes necessary to cancel the approval process after submission, from the Document Management page, click **Approval Details**, then click **Cancel Approval Process**.
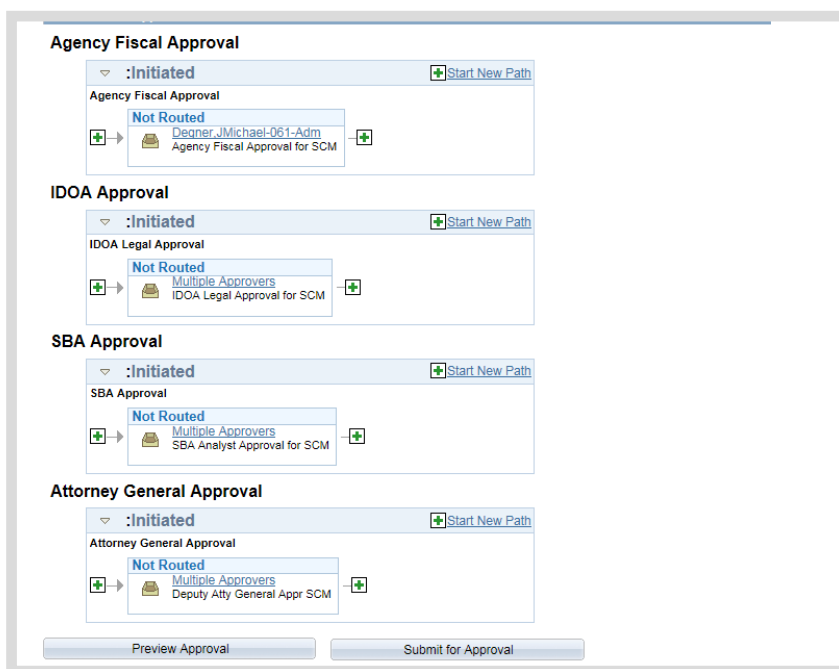
> **If your contract was denied and needs to be edited, click Approval Details, click Cancel Approval Process, click Return to Document Management link, click Cancel Signature Process, and follow the steps to edit the text contract document through sending for SCM Contract Document Approvals.**

After submission, the status displayed on the Document Management page will update to Pending Approval.

When all approvals are completed the Document Management Page will update to Approved Status and the Contract Administrator will receive an email.

Step 1: Dispatch

A signed and approved SCM Contract Document must be dispatched before the final step, Execute. Although required, the Dispatch step does nothing more than prepare the SCM Contract Document so that it may be executed.

1. Click **Dispatch**

    The Dispatch page will open. There are no updates/changes required on this page.

| Favorites | Main Menu | > Supplier Contracts | > Create Contracts and Documents | > Document Management |

SetID:	STIND	Contract ID:	000000000000000
Vendor:	KREAMO BAKERS		
Document Type:	SOI Professional Services		
Description:	testing		
Administrator:	Pierce,William-067		
Sponsor:		Department:	493006 IOT
Version:	0.01	Created On:	07/11/14 9:07AM
Status:	Approved	Last Modified On:	07/11/14 10:47AM

Dispatch

▼ Signing Details

| Internal Signature Status: | Pending Signatures | External Signature Status: | Signed |

2. Click **OK**

    The status displayed on the Document Management page will update to Dispatched.

Dispatch

| SetID: | STIND | Contract ID: | 0000 |
| Vendor: | KREAMO BAKERS | | |

Version:	0.01
Administrator:	Pierce,William-067
Email:	XXBPierce@iot.IN.gov
*Delivery Method:	Manual ▼
Send as File Type:	▼ Preview

Subject:

Documents for Review/Signature - Contract ID: 00000000000000000000013119

Contacts

Selected	Contact ID	Name	Title	Email ID
☐				

Select All Contacts   Clear All Contacts

OK   Cancel

Step 2: Execute the SCM Contract Document

An SCM Contract Document is eligible to be executed when the status on the Document Management page is indicated as Dispatched. Completion of this step sends an email notification when executed and allows the Contract Administrator to indicate whether or not the SCM Contract Document will be viewable to the public on the Transparency Portal.

! If a Ship To ID was not identified on the Transactional Contract Document in the PO Defaults section, an error message will be generated redirecting the Contract Administrator to that page. An SCM Contract Document will not execute without this information.

If the SCM Contract Document has not been internally and/or externally signed, the following message is received:

Message
Not all Internal Signers have signed this document (10421, 198)
This document has not received all internal signatures yet - Are you sure you want to proceed with this action?
You can review who has not signed the document yet by checking the Internal Contacts page vs the signature section in the document. (Please note that if some users signed the document offline, the system will not know about it.)

    a.   Click **No**

    b.   Submit a **GMIS Issue**.

1. Click **Execute Contract**

Version:	0.01	Created On:	07/11/14
Status:	Dispatched	Last Modified On:	07/12/14
	Redispatch		
	Execute Contract		

2. Click **Yes** or **No** as appropriate

STOP

    If answered incorrectly, submit a GMIS issue immediately.

The SCM Contract Document status will update to Executed and the Transparency ID will be assigned.

Message
Should this contract be placed on the Indiana Transparency Portal? (30000,231)
By answering Yes, the contract will be viewable to the public on the Transparency Portal.
By answering No, the contract will be marked as confidential and will NOT be viewable on the Transparency Portal.
Yes   No

After an SCM Contract Document has been executed and if the Contract Administrator indicated that the SCM Contract Document should be viewable

Description:	testing			Transparency ID: 77541
Administrator:	Pierce,William-067			
Sponsor:		Department:	493006	IOT - Service Operations
Version:	0.01	Created On:	07/11/14 9:07AM	Document D
Status:	Executed	Last Modified On:	07/12/14 2:08PM	
Reset to Dispatch		Executed On:	07/12/14 2:08:21PM	
Create Amendment				

to the public, a nightly process initiates that generates a file with Executed SCM Contract Documents for the day and sends them to IDOA.

At that time, IDOA will move SCM Contract Documents to the Transparency Portal and the External Signer and Contract Administrator will receive an email that states the SCM Contract Document has been approved. Allow a few days for the SCM Contract Document to appear on the Transparency Portal.

Step 3: Update Transactional Contract Document

WATCH IT!

Before a Purchase Order can be updated to include additional funds the Transactional Contract Document must be in Approved status.

Return to the Transactional Contract Document

1. Click **Contract ID** on the Document Management page

   or

   navigate to Main Menu >> Supplier Contracts >> Create Contracts and Documents >> Contract Entry >> Find an Existing Value (Search for the Contract ID)

Document Management   Return to Document S₁

| SetID: | STIND | Contract ID: | 00000000000000000000013034 |
| Vendor: | FA WILHELM CONSTRUCTION CO INC | | |

Document Type: 00061_PW_CONS<$150K
Description: Public Works Electrical and Dr

                                                    Transparency ID: 68129

ORACLE

Favorites | Main Menu > Supplier Contracts > Create Contracts and Documents > Contract Entry

Contract Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

SetID:	= ∨	STIND	× 🔍
Contract ID:	begins with ∨		
Contract Version:	= ∨		
Version Status:	= ∨		∨

2. Change status to Approved

Contract Entry

Contract

SetID:	STIND			**Contract Version**	
				Version:	1	Status
Contract ID:	00000000000000000000014127	Seq#:				Appr₀
*Status:	Approved ∨	Location:	REMIT001			

3. Click **Save**

| 1 | | | |

💾 Save   🔍 Return to Search   📧 Notify   🔄 Refresh

Step 4: Copy Requisition to Existing Purchase Order

For Amendments/Renewals that required an increase in funds follow the Instructions for Contract Amendments and Renewals document on the Procurement PeopleSoft Guides Purchase Orders web page: www.in.gov/idoa/2934.htm.

Record of Document Updates

Version 18.08-06

Added Considerations when Creating Contracts	Page 5
Added Financials Procedure Overview	Page 6
Updated Requisition Types that are used for SCM Contract Documents chart	Phase 2-2
Updated Screenshot	Phase 4-30
Added troubleshooting box	Phased 4-40
Added Watch It! Videos	as needed
Updated page references	as needed

Version 17.08-25

Added "even if entering .001 for a zero dollar contract"	Phase 1-1
Updated screenshot 5	Phase 1-2
Added Document Type screenshot	Phase 2-1
Moved Clearance Check bullet point to clarify Clearance Check requirements	Phase 4-10
Added note to clarify Clearance Check requirements	Phase 4-38