



# Indiana Department of Administration Procurement Division

Version 17.02-23

## 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](http://www.in.gov/idoa/3000.htm) or the Delegation of Purchasing Authority Program manual posted at [www.in.gov/idoa/2865.htm](http://www.in.gov/idoa/2865.htm).

Contract Administrators and Internal Collaborators will receive periodic emails providing helpful hints. These will be posted on the Electronic Contracting web page available at [www.in.gov/idoa/3016.htm](http://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/](http://www.adobe.com/reader/)

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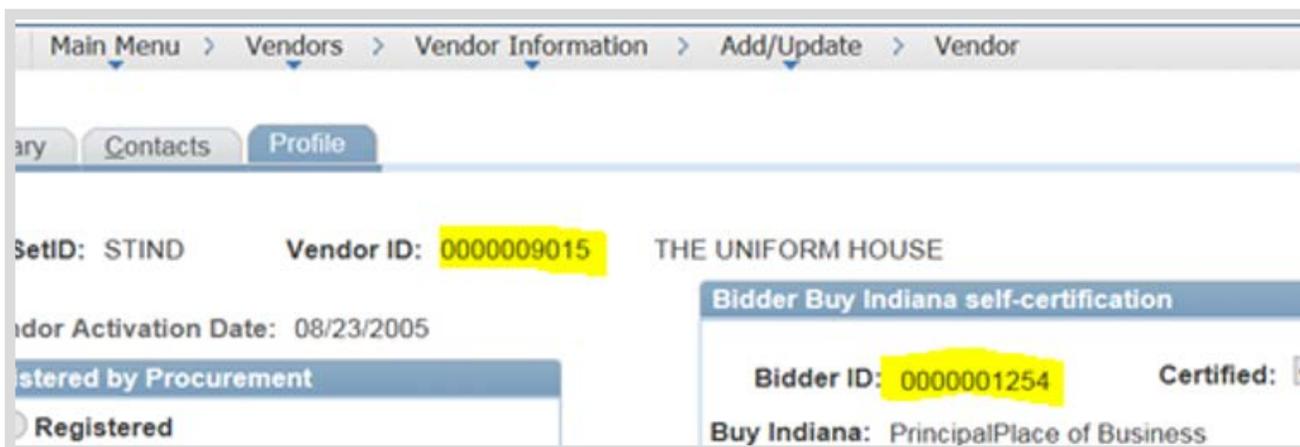
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# Importing Existing Executed Documents

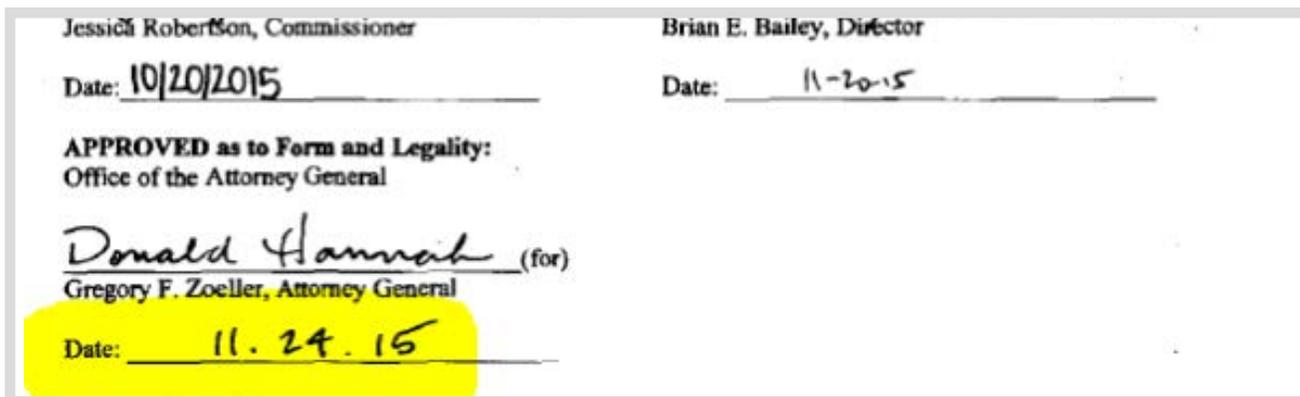
A Transactional Contract Document does not exist in SCM and must be created prior to creating the SCM Amendment Document. The executed document(s) need(s) to be imported into PeopleSoft in order to do a future amendment/renewal within SCM.

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.



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



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?

# Phase 1: Create the Transactional Contract Document

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



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)
- 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

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

- Enter/Look up Business Unit (required)
- Enter/Look up Ship To: (required)
- Enter/Look up Dept (agency department ID) (required)
- Click **OK**

| *GL Unit | Fund | Account | Program | Dept   | Bud Ref | PC Bus Unit | Project | Activity |
|----------|------|---------|---------|--------|---------|-------------|---------|----------|
| 00061    |      |         |         | 039095 |         |             |         |          |

7. Complete **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 and it will default into the Text Contract Document when it is created.

| Tier 2 Type | Bidder ID  | Name                           | Percentage | Utilization Date | Scope              |
|-------------|------------|--------------------------------|------------|------------------|--------------------|
| 1 Minority  | 0000001707 | Alan Stanley & Associates, Inc | 2.500      | 01/01/2017       | Marketing services |

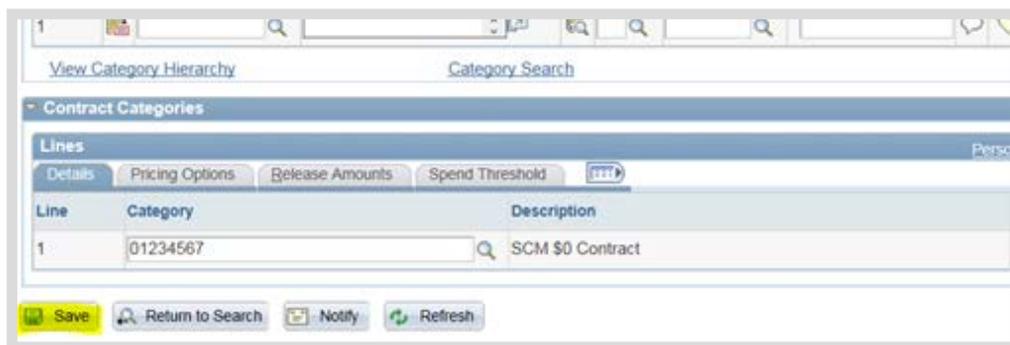
- Review the original contract to acquire participants' information
- Select Tier 2 Type (If no participation, select **NONE** and go to 8 on [pg. 7](#))
- Enter/Look up Bidder ID
- Enter participation Percentage
- Enter Utilization Date
- Enter Scope
- Click **Add (+)** to insert additional lines, then 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**

SetID: STIND

Contract ID: 0000000000000000000015045      Seq#:      Status: Current

\*Status:       Location: None      Approval Due Date:

Administrator/Buyer:       Werner, Jeania-061      [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:       [Vendor Search](#)

\*Vendor ID:       FA WILHELM CONSTRUCTION  
CO INC

\*Begin Date:       [Add Comments](#)      [Activity Log](#)

Expire Date:       [Contract Activities](#)      [Document Status](#)

Renewal Date:

Currency:             [Primary Contact Info](#)      [Thresholds & Notifications](#)

Primary Contact:       [Contract Header Agreement](#)

Vendor Contract Ref:

Description:       [Contract Releases](#)

**Amount Summary**

|                            |  |
|----------------------------|--|
| Maximum Amount:            | <input type="text" value="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.

# Phase 2: Upload the Text Contract Document(s)

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



1. Click **Add a Document**

The Create Document page will appear

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)

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.

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 below.

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

|                                |                                |                                |                                |
|--------------------------------|--------------------------------|--------------------------------|--------------------------------|
| Amendment                      | Equipment Lease to Purch Agree | Memo of Understanding          | Professional/Pers Cntrct Amend |
| Amendment Info Tech            | Grant                          | Proc Serv Contract Continue    | Renewal Equipment Lease Agree  |
| Amendment Grants               | IBM Basic Ordering Agreement   | Procurement Contract Amendment | Renewal Equipment Lease Purch  |
| Amendment Property Lease       | Info Tech Addendum             | Procurement Contract Renewal   | Renewal Maintenance of Equip   |
| Continuation Equip Lease Purch | Info Tech Prof Services        | Procurement Service Contract   |                                |
| Continuation Maint of Equip    | Info Tech Renewal              | Prof Service Contract Renewal  |                                |
| Equipment Lease Agreement      | Maintenance of Equipment       | Professional Service Contract  |                                |

g. Click **Import Document**

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

**STOP**

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**



**Complete actions  
on pg. 11**

**Original Contract/Document  
and  
1 Amendment/Renewal**



**Complete actions  
on pg. 12-13**

**Original Contract/Document  
and  
Multiple Amendments/Renewals**



**Complete actions  
on pg. 14-16**













# Sample of Imported Document Management Page

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

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 [Return to Document](#)

|                |                                |              |   |                                |
|----------------|--------------------------------|--------------|---|--------------------------------|
| SetID:         | STIND                          | Contract ID: | <a href="#">000000000000000000000000000015046</a> |                                |
| 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 |

---

|            |          |                   |                     |                                  |
|------------|----------|-------------------|---------------------|----------------------------------|
| Amendment: | 4        | Created On:       | 10/03/16 12:00AM    | <a href="#">Document Details</a> |
| 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 |                                  |

### Imported Document

|  |   |   |
|--|---|---|
| <b>View and Edit Options:</b><br><input type="button" value="View Original Document"/><br><input type="button" value="View Amendment File"/><br><a href="#">Add Supplemental Documents</a><br><a href="#">Document Version History</a> | <b>Review and Approval:</b><br><a href="#">Internal Contacts/Signers</a><br><a href="#">External Contacts/Signers</a><br><a href="#">Clearance Check</a><br><a href="#">Add External User</a> | <b>Other Document A</b><br><input type="button" value="Send to"/><br><input type="button" value="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

**Bill to:** Indiana Dept of Administration  
Controller's Office  
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:                      |            |                               |        |

**MUST COMPLETE FOR ICPR**

Print REQ  
 Streamline Eligible

| Line                        | Item                    | Description   | Quantity | UOM | Unit Price | Ext Amt         |
|-----------------------------|-------------------------|---|----------|-----|------------|-----------------|
| 1-1                         | window washing services | 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     |     |            |                 |
| <b>Requisition Total \$</b> |                         |   |          |     |            | <b>1,250.00</b> |

# Phase 1: Update the Transactional Contract Document

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



1. Update the Header Information
  - a. Change Status to Open
  - b. Update Maximum Amount to include the amendment/renewal amount if there is a change in funds
  - c. Update Expire Date (if applicable)

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

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

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

\*Begin Date: 12/02/2016 [BT]  
 Expire Date: **12/01/2017** [BT]  
 Renewal Date: [BT]

- b. Verify Business Unit

**PO Defaults**      [Add Open Item Price Adjustme](#)

- c. Verify Ship To

**Header**

Business Unit: **00061** [Q]      [Copy from](#)  
 Vendor Loc: REMIT001 [Q]  
 Buyer: [Q]  
 Origin: NON [Q]  
 Currency: USD [Q]      CRRNT [Q]      Billing  
 Payment Terms ID: AREAR [Q]       Tax E

**Shipping Information**

Ship To: **061MIS** [Q]      [Ship To Address](#)      AM Bu  
 Location: [Q]  
 IN Unit: [Q]      Profile  
 Freight Terms: FOB DEST [Q]      Cost T  
 Ship Via: [Q]      Ultimat  
 Charge By: Quantity [V]      Where

**Distributions**

| *GL Unit  | Fund | Account | Program | Dept              | Bud Ref | PC E Unit |
|-----------|------|---------|---------|-------------------|---------|-----------|
| 00061 [Q] | [Q]  | [Q]     | [Q]     | <b>039095</b> [Q] | [Q]     | [Q]       |

[Add Comments](#)

**OK**      Cancel      Refresh

3. Click **Save**

**Save**      Notify      Refresh

## Phase 2: Create the Text Contract Document

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



### STEP 1: Initiate the Text Contract Document

1. Click **Add a Document**  
The Create Document page will appear

A screenshot of a web form showing the 'Approval Due Date' field with a calendar icon. Below it, the 'Add a Document' button is highlighted in yellow.

2. Click **Create Amendment**  
A message window will open regarding Clearance Checks

A screenshot of a web form showing the 'Create Amendment' button highlighted in yellow.

3. Click **Yes**

A screenshot of a message window with a blue header 'Message'. The text reads: 'Creating an amendment will delete the existing clearance check and require a new one, continue? (30000,228)'. At the bottom right, the 'Yes' button is highlighted in yellow.

### STEP 2: Choose Configurator ID

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

A screenshot of the 'Create an Amended Version' form. The 'Amendment Option' is set to 'Amendment Files Only'. The 'Amendment Configurator ID' field has a magnifying glass icon. The 'Zero Amount Amendment' dropdown is set to a downward arrow. The 'Version' radio button is set to 'Reset Version back to 0.00'.

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

A screenshot of the 'Create an Amended Version' form. The 'Amendment Option' is set to 'Amendment Files Only'. The 'Amendment Configurator ID' field has a magnifying glass icon highlighted in yellow.

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

| Configurator ID      | Configurator Type | Description  |
|----------------------|-------------------|--|
| 00061_AMEND_DESIGNER | PCON              | 00061 Public Works Designer/Consultant Contract Amendmer |
| 00061_PW_AMEND       | PCON              | 00061 Public Works Construction Change Order/Amendment   |
| 00061_PW_RENEWAL     | PCON              | 00061 Public Works Renewal Template                      |
| 00340_AMENDMENT      | PCON              | 00340 Amendment  |
| 00400_AMENDMENT_INC  | PCON              | 00400 ISDH Amendment to Increase for WIC Contracts       |
| 00510_GRANT_AMEND    | PCON              | 00510 DWD Grant Amendments                               |
| 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_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              |

## STEP 3: Build the Text Contract Document

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

Does this contract require IOT approval?

- Select whether this is a Zero Amount Amendment; **Yes** or **No**

Zero Amount Amendment:

Amendment Amount:  x

- If **no**, enter only the amount of the new amendment/ renewal in the Amendment field
- If **Yes**, no further action is required

- Leave **Version** as defaulted (do not change)

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

- Add **Comments** (optional)

\*Comments:

Amendment Created:

- Click **OK**

- Click **OK** to the Generation Error Message

**Message**

Generation errors have been logged (10420,356)

Check Generation Log.





## 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, [pg. 30](#)).

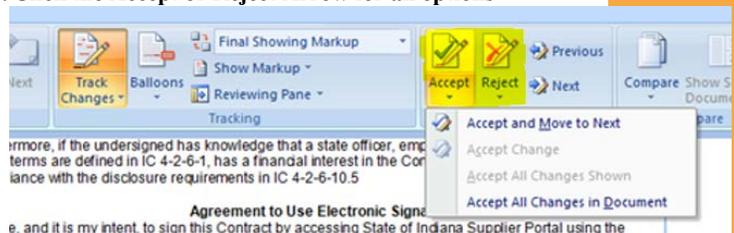
For additional information, refer to the [Microsoft Word: How to Track Changes in Documents](#) training video on <http://www.in.gov/idoa/3016.htm>.

### 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.

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

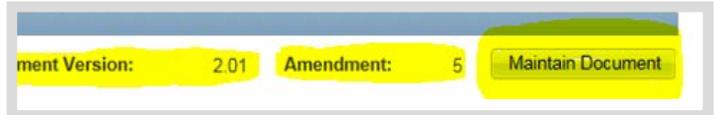
Attachments/exhibits that need to be incorporated as part of the legally binding SCM Contract Document must be inserted into the Text Contract Document directly following the signature/approval page. The entire SCM Contract Document will be posted to the Transparency Portal if designated by the Contract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





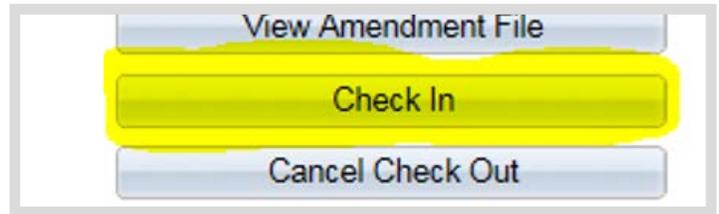
6. Click **Maintain Document**

The Document Management page will open in a new tab

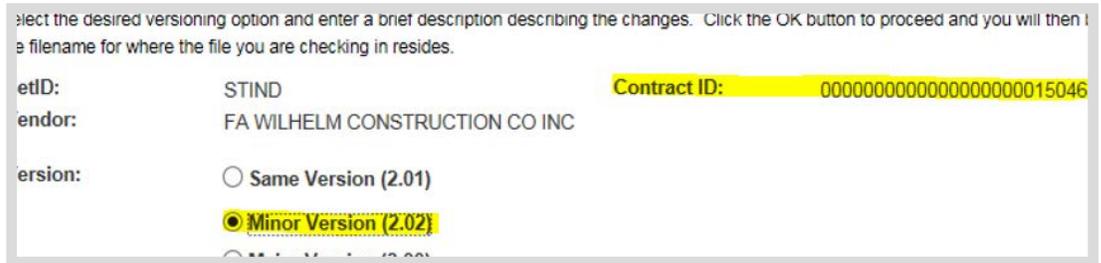


7. Click **Check In**

The Check In Document page will open.



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



The **Minor Version** option will be selected by default. Do not change.

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

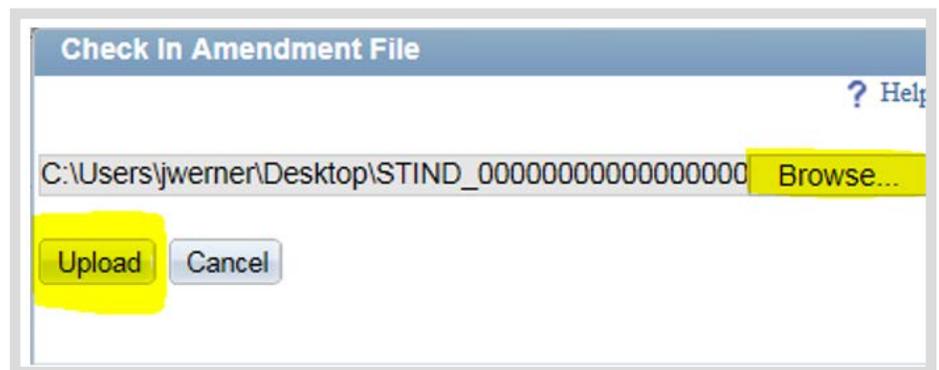


10. Click **OK**

A pop-up window will open.

11. Click **Browse**

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



12. Click **Upload**

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

# STEP 5: Supplemental Documents

## 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

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

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

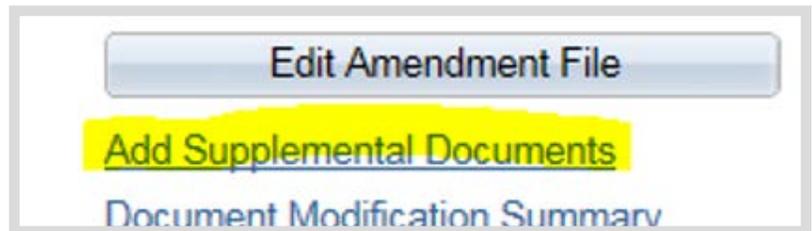
- Clearance check results
- Email correspondence concerning negotiations
- Research information gathered during planning phases
- Notes outlining specifications/qualifications to consider

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 must follow the signature/approval page ([See Edit the Text Contract Document, pg. 24](#)).

### 1. Click **Add Supplemental Documents**

The Supplemental and Related Documents page will open.

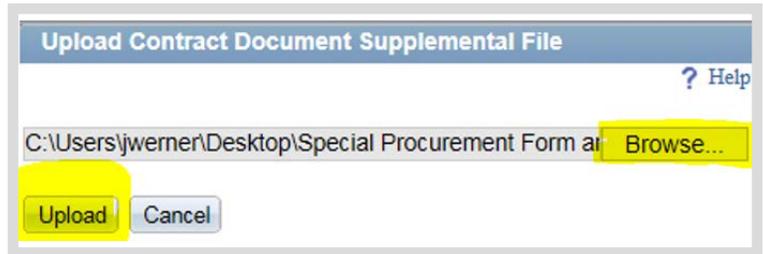


### 2. Click **Upload a Supplemental Document File**

A pop-up window will open



3. Click **Browse**  
Search network file directories and locate/select the saved supplemental document.



4. Click **Upload**  
The uploaded file will be displayed under the Supplemental Documents section.



- 1 Click Upload Another Supplemental Document File to include additional documents.
- 2 Check Allow Email/Dispatch to prepare the supplemental document to be shared with the External Signer. (If applicable)
- 3 The File Name is what the supplemental document was originally titled when uploaded into PeopleSoft.
- 4 Use the Title field to rename the supplemental document according to the agency's business process. (If applicable)
- 5 Click View to open and review the supplemental document.
- 6 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.

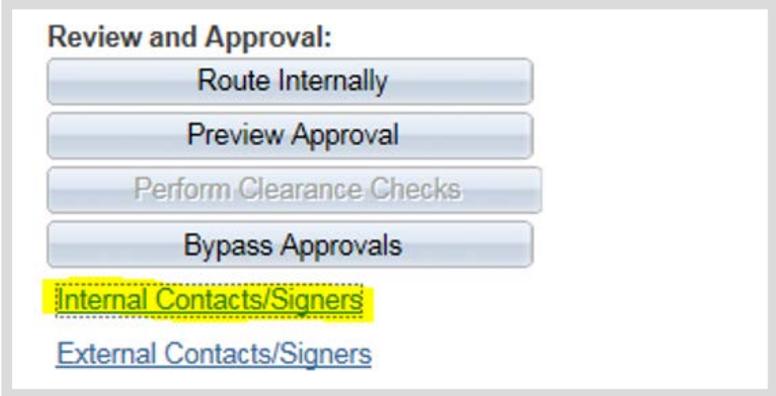
■ The Collaborator role is granted after completing the IDOA Contract Administrator training or the online collaboration training and a GMIS issue is submitted by the Agency Fiscal Security Coordinator. If there are access problems, submit an issue to GMIS.

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

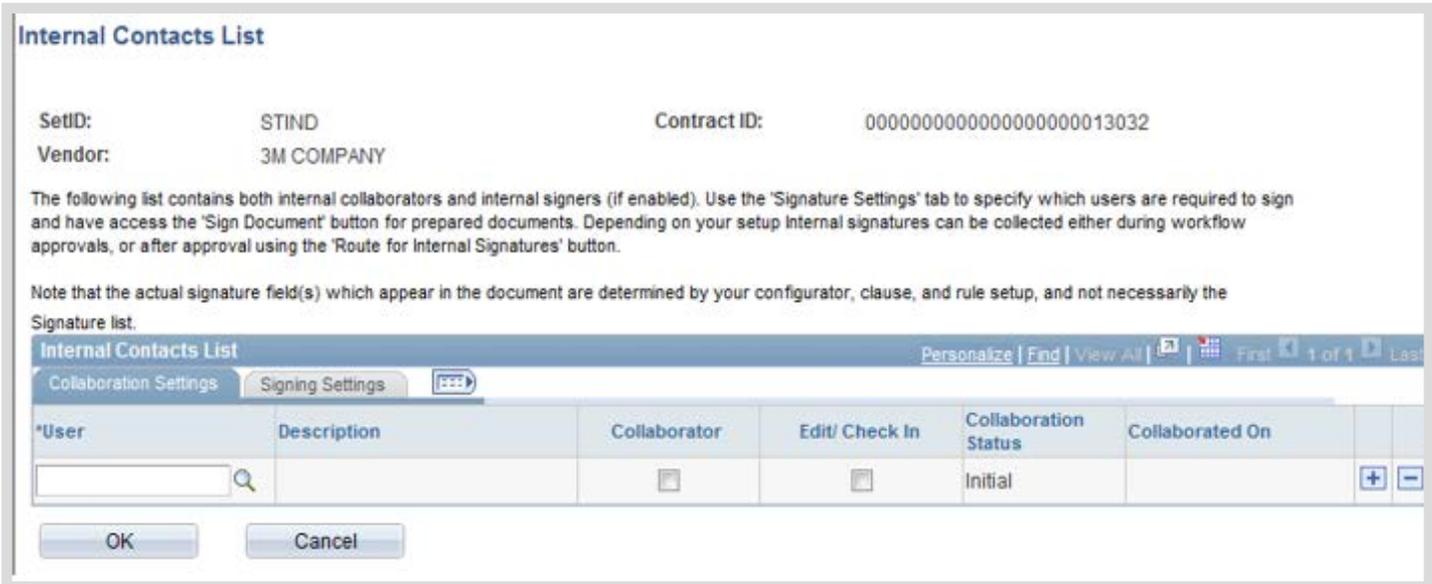
Collaboration must be finalized before the External Signer and Internal Signer can sign the SCM Contract Document.

# Set up Internal Contact(s)

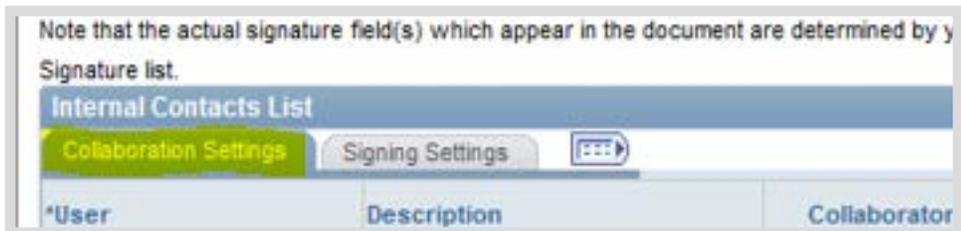
1. Click **Internal Contacts/Signers**



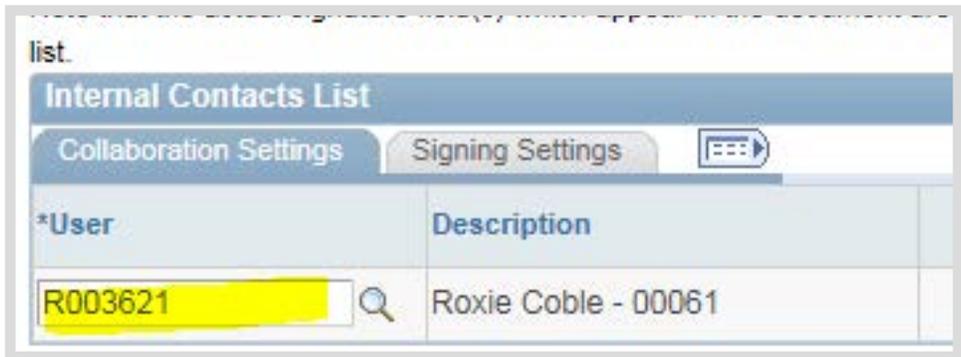
The Internal Contacts List page will open.



2. Select the **Collaboration Settings** tab



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



- Select the security access for this Collaborator

- For view access only, select the **Collaborator** checkbox.

- For edit access, select the **Collaborator** and **Edit/Check In** checkboxes.

| Collaborator                        | Edit/ Check In                      | Collaboration Status |
|-------------------------------------|-------------------------------------|----------------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Initial              |

### Adding or Removing Collaborators

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

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

| Edit/ Check In           | Collaboration Status | Collaborated On |
|--------------------------|----------------------|-----------------|
| <input type="checkbox"/> | Initial              |                 |

- Click **OK**

The screen will return to the Document Management page.

| *User   | Description         | Collaborator                        | Edit/ Check In                      | Collaboration Status |
|---------|---------------------|-------------------------------------|-------------------------------------|----------------------|
| R003621 | Roxie Coble - 00061 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Initial              |

## Launch Internal Collaboration

- Click **Route Internally**

**Review and Approval:**

- Route Internally
- Preview Approval
- Perform Clearance Checks
- Bypass Approvals
- Internal Contacts/Signers
- 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: 0000000000000000000015046  
 Vendor: FA WILHELM CONSTRUCTION CO INC

| *User     | Description         | Collaborator                        | Can Edit During Collaboration       | Collaboration Status | Date Time |
|-----------|---------------------|-------------------------------------|-------------------------------------|----------------------|-----------|
| 1 R003621 | Roxie Coble - 00061 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Initial              |           |

Buttons: Save, Route Internally, Return to Document Management

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

- 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.

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 **1** Last Modified On: 12/20/16 10:36AM

[Includes Imported Document](#)

**2** Collaboration Comments

View and Edit Options: Review and Approval: Other Document Actions:

[View Original Document](#) [Cancel Collaboration](#) **3** [Import Prior Document](#)

[View Amendment File](#) [Modify Collaboration](#) **4** [Generation Log](#)

[Internal Contacts/Signers](#)

- Once Internal Collaboration has been routed, the Document status will be Pending Collaboration.
- Click the Expand icon to open the Collaboration Comments section if collapsed.
- Collaboration may be canceled at any time by the Contract Administrator. Canceling will remove all Collaborators and associated comments.
- 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 "000000000000000000000015033"

To Thayer, Jessica (IDOA)

Enterprise Vault + Get

Your collaboration is requested for Document "000000000000000000000015033".

Set ID/BU: STIND  
Document: 000000000000000000000015033  
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](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       |
|-------------------------------------|------------|---------------------|
| <input checked="" type="checkbox"/> | Business   | JWerner@idoa.IN.gov |

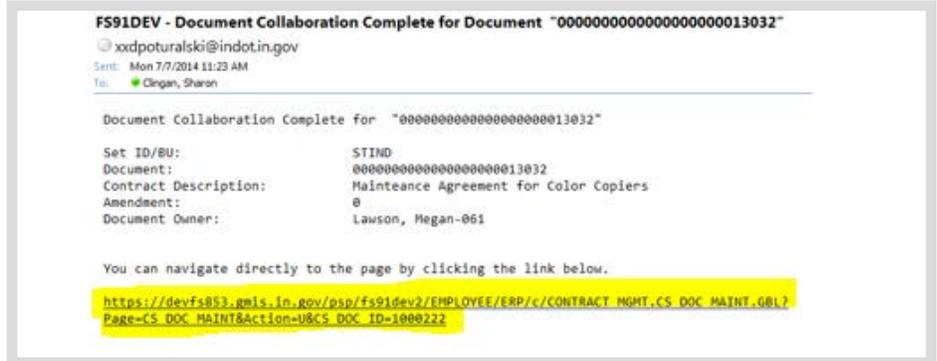
# Finalize Internal Collaboration

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:

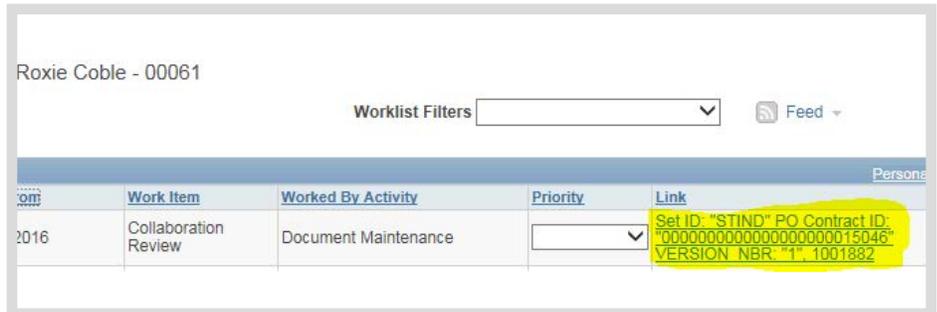
**a. Email Hyperlink**

Click the **hyperlink** provided in the email notification.



**b. Worklist**

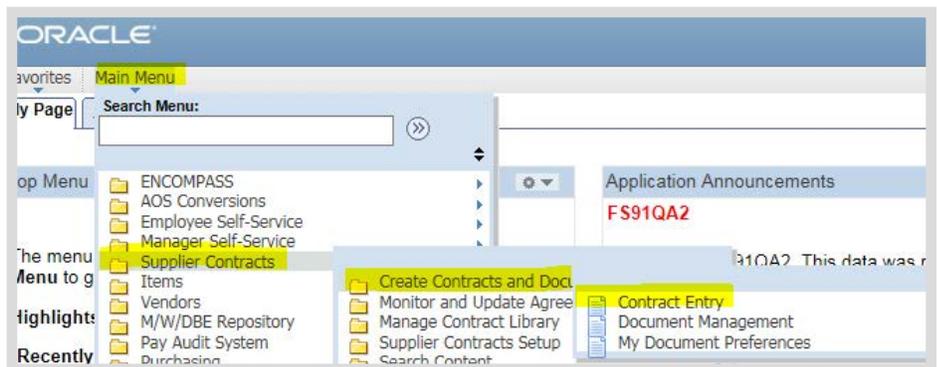
Click the **hyperlink** to access the collaboration item (will be marked as “Collaboration Complete”).



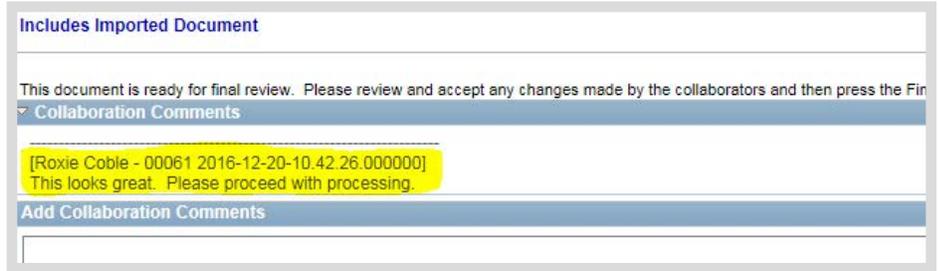
**c. Navigation**

Main Menu >> Supplier Contracts >> Create Contracts and Documents >> Contract Entry.

Click **Maintain Document** after locating the appropriate SCM Contract Document.

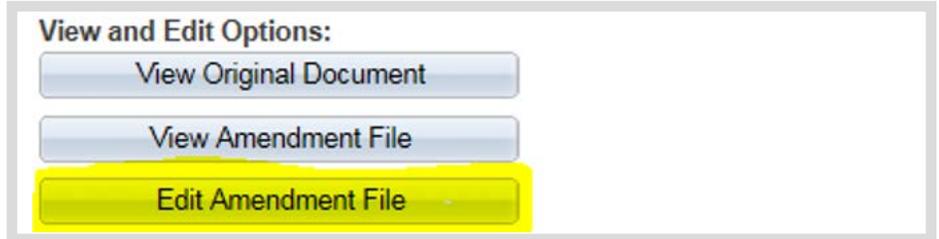


2. Review Collaboration Comments



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 [pg. 23](#)).



4. Click **Finalize Collaboration**

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



# 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



2. Update Document Type (if applicable)

Leave the Version as defaulted

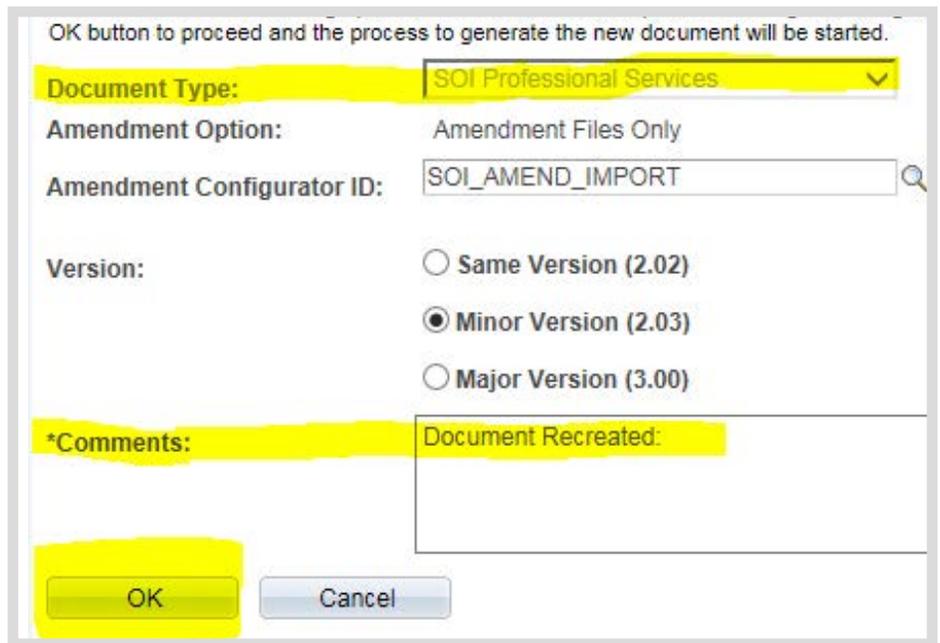
3. Enter Comments (if applicable)

4. Click **OK**

A pop-up will open.

5. 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 in PeopleSoft, receiving a User ID and password. This information 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.

**When the Vendor ID is known/available but the Bidder ID is not.**



**Complete Steps on**  
**Pg. 39**

**When the Bidder ID is known or looked up using search criteria.**

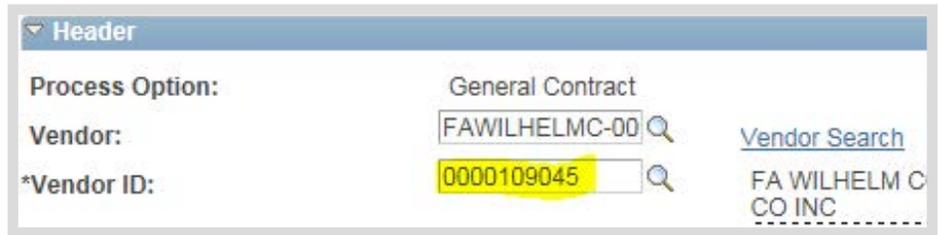


**Complete Steps on**  
**Pg. 40**

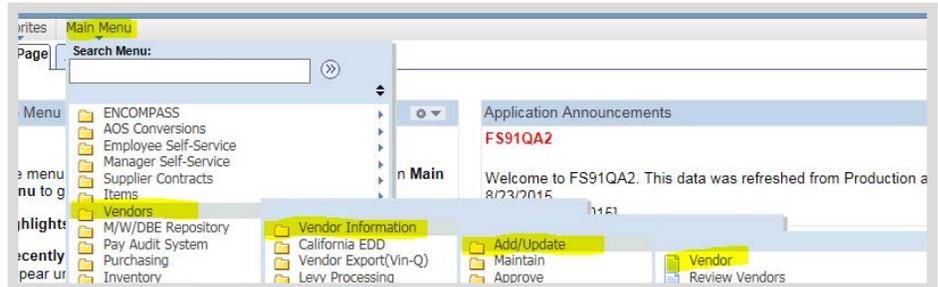
## Find the Bidder ID

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

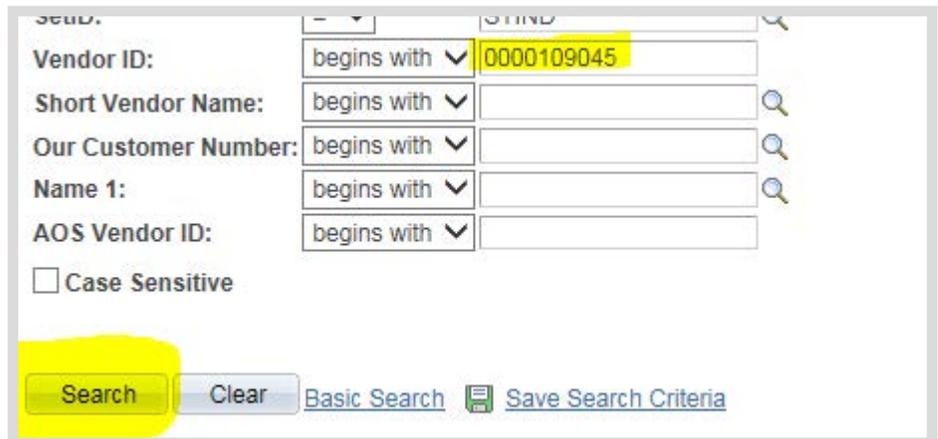


2. Navigate to the vendor file Main Menu >> Vendors >> Vendor Information >> Add/Update >> Vendor



View access can be granted by submitting a GMS issue.

3. Enter the Vendor ID as search criteria



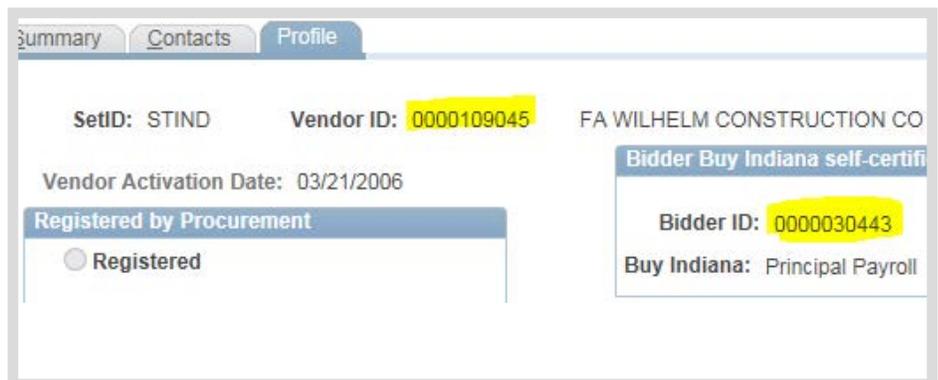
4. Click Search

5. Select the Profile tab



6. Note the ten digit Bidder ID

If there is not a Bidder ID, the entity has not successfully completed the Bidder Registration process. The Contract Administrator must request the vendor complete the registration at [www.in.gov/idoa/2464.htm](http://www.in.gov/idoa/2464.htm).



## Identify Existing External Signer's User ID

It is possible that the required signer will be the specific person who completed the Bidder Registration. It is also possible that the designated signer may have already been issued his/her own unique ID and password associated with the Bidder ID.

1. Click **Add External User**

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

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

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.
  - 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 \(pg. 41\)](#) to create a new signer.

5. Click **OK**

6. Continue to Assign the Signer [\(pg. 42\)](#)

## 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

New User

New User ID: EXS0000000911

Password: [blurred]

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**

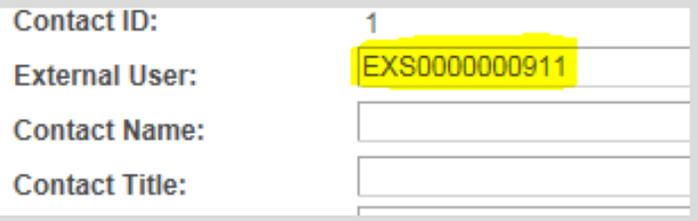
The External Contacts page will open.



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)
- c. Enter the User ID noted from Creating a New External Signer on pg. 41. (Example: EXS0000000911)



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

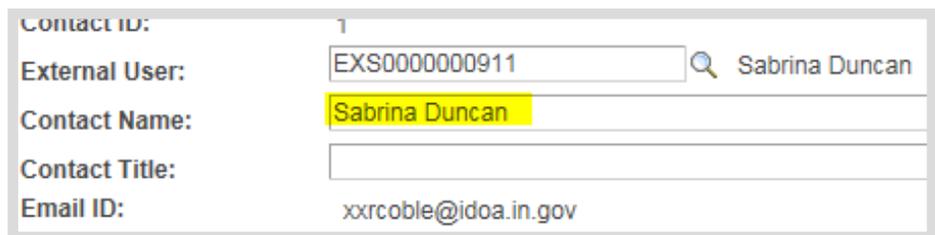
3. Tab Out or Click in the Contact Name field

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

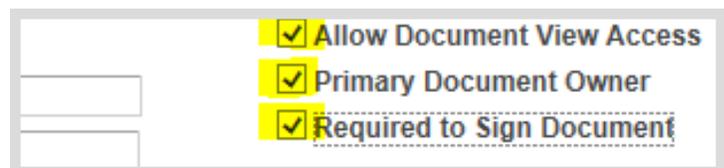
The email address for the signer will default based on the User ID.



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)

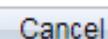
Click **Add (+)** to designate additional contacts. The **Primary Document Owner** and **Required to Sign Document** checkboxes will not be available for these users.



6. Click **OK**



OK



Cancel





# 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.

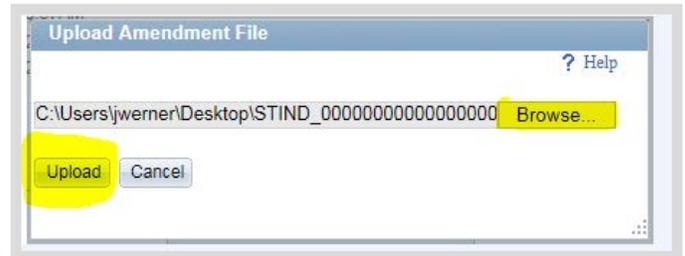
1. Click **Upload Prepared Document**

A pop-up window will open.



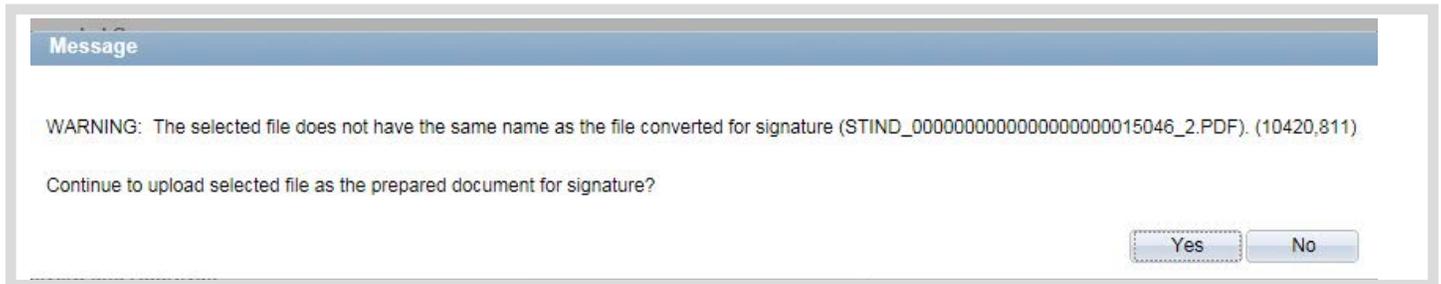
2. Click **Browse**

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

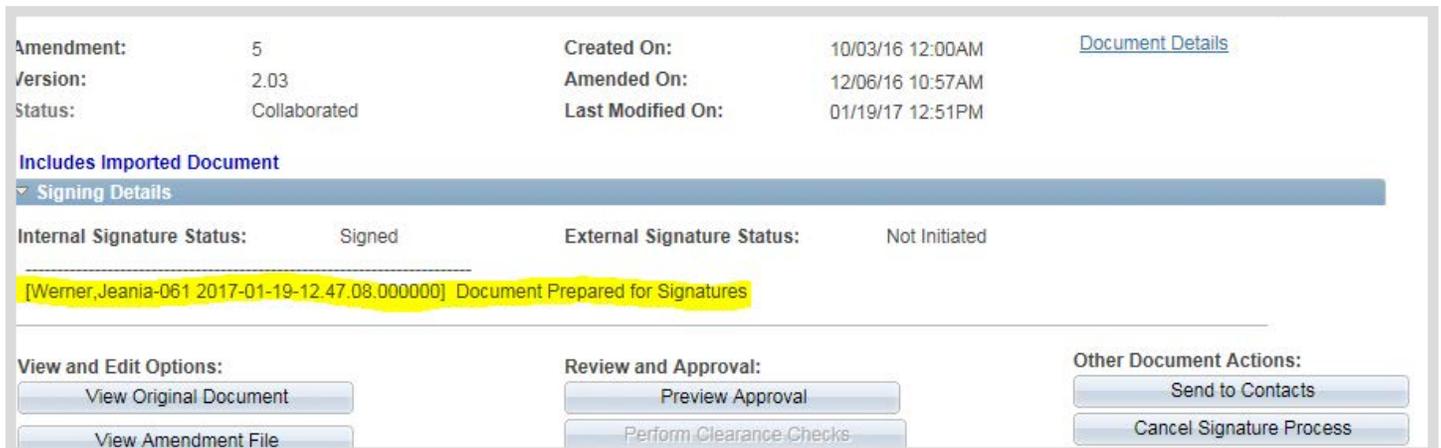


3. Click **Upload**

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**.



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.



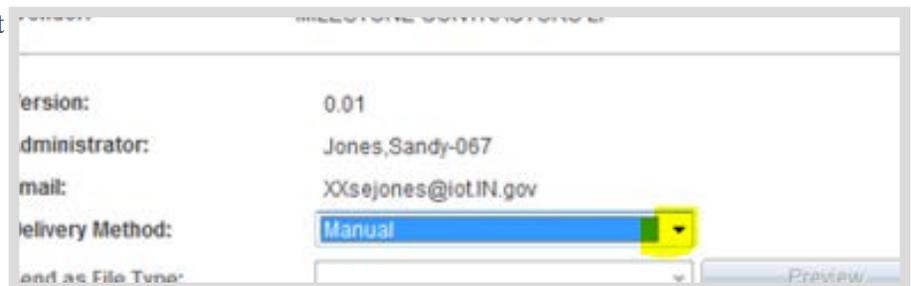
# STEP 10: Send the SCM Contract Document for External Signature

## 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

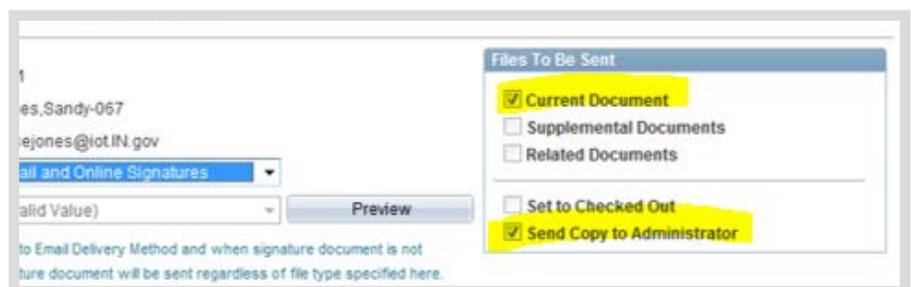


## 3. Select **Email and Online Signatures**

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



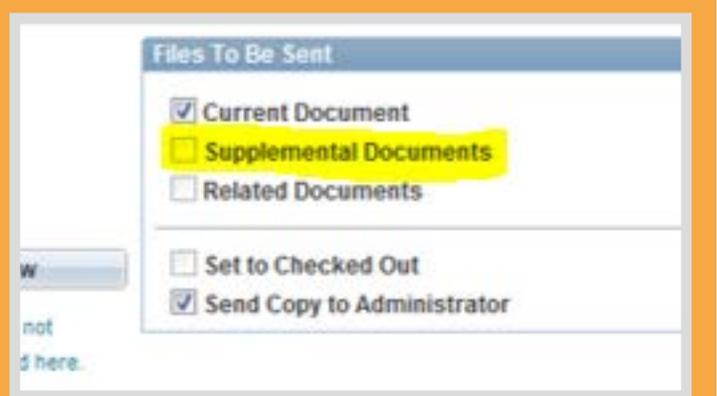
The **Current Document** can be unchecked so a copy is not emailed to the External Signer. This removes the 25MB file size limitation caused by Outlook.



## Sending Supplemental Documents to External Contacts

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

- The **Allow Email Dispatch** checkbox was checked; *see Supplemental Documents section*
- 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: 0000000000000000000013187 1

**Description:**  
Dear CIBER, 2

Contract 0000000000000000000013187 For Carpet Cleanin

| Contacts                            |            |              |
|-------------------------------------|------------|--------------|
| Selected                            | Contact ID | Name         |
| <input checked="" type="checkbox"/> | 1          | Megan Fields |

Select All Contacts      Clear All Contacts

---

Dear Sabrina at F.A. Wilhelm Construction Co., Inc.,

Contract 0000000000000000000015046 For Consulting with the State Of Indiana has been prepared and is ready for your review and electronic signature. 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 (EXS0000000911) and Password.

[https://fs85.gmis.in.gov/psp/fs91prd/SUPPLIER/ERP/c/CONTRACT\\_MGMT\\_SUPPLIER\\_CS\\_DOC\\_SUPP\\_GBL?Action=U&CS\\_DOC\\_ID=1001882](https://fs85.gmis.in.gov/psp/fs91prd/SUPPLIER/ERP/c/CONTRACT_MGMT_SUPPLIER_CS_DOC_SUPP_GBL?Action=U&CS_DOC_ID=1001882)

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

[https://fs85.gmis.in.gov/psc/guest/EMPLOYEE/ERP/c/SOI\\_CUSTOM\\_APPS.SOI\\_GMIS\\_ISSUE.GBL](https://fs85.gmis.in.gov/psc/guest/EMPLOYEE/ERP/c/SOI_CUSTOM_APPS.SOI_GMIS_ISSUE.GBL)

- 1 The Subject field will default and will include the Contract ID number. The Subject can be modified if necessary.
- 2 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.

| Name           | Title | Email ID   | Description    |
|----------------|-------|--|----------------|
| Sabrina Duncan |       | <a href="mailto:rcoble@idoa.in.gov">rcoble@idoa.in.gov</a> | 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](http://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](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

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.

- 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,**



**Complete Steps on  
[pg. 50](#)**

**If the Contract Administrator is not the  
Internal Signer,**



**Complete Steps on  
[pg. 51](#)**









## 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).

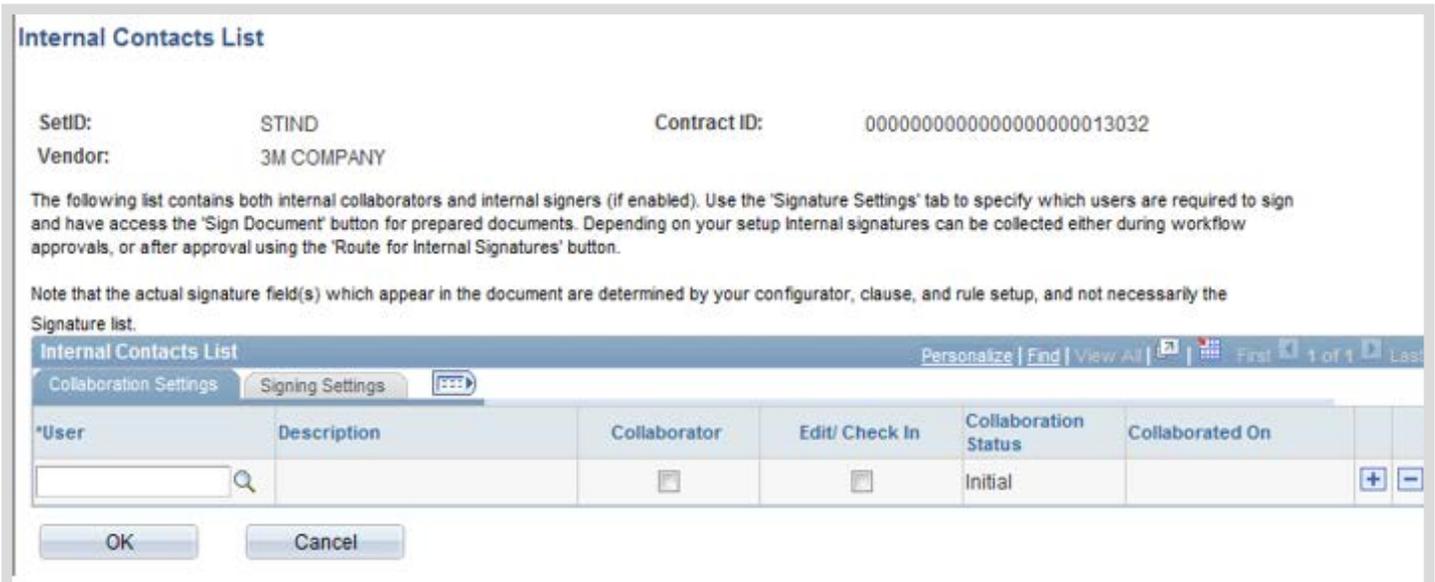
1. Click **Stop Internal Signatures**



2. Click **Internal Contacts/Signers**



The Internal Contact 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**

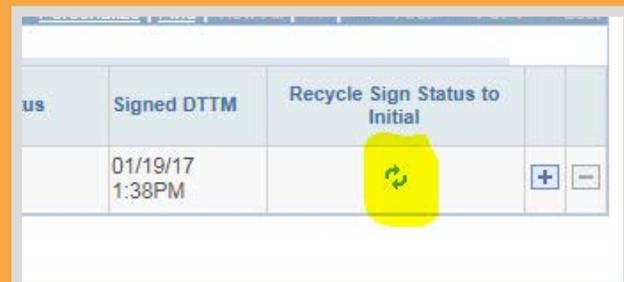


10. Click **Route for Internal Signatures**  
(See the Route for Internal Signatures section [pg. 53](#)).



**If the Internal Signer failed to Upload the signed PDF,**

- Click **"Recycle Sign Status to Initial"** within the Internal Contacts/Signers page
- Click **OK**
- Click **Route for Internal Signatures** on the Document Management page  
*See the Route Internal Signatures section [pg. 53](#)*



# 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.

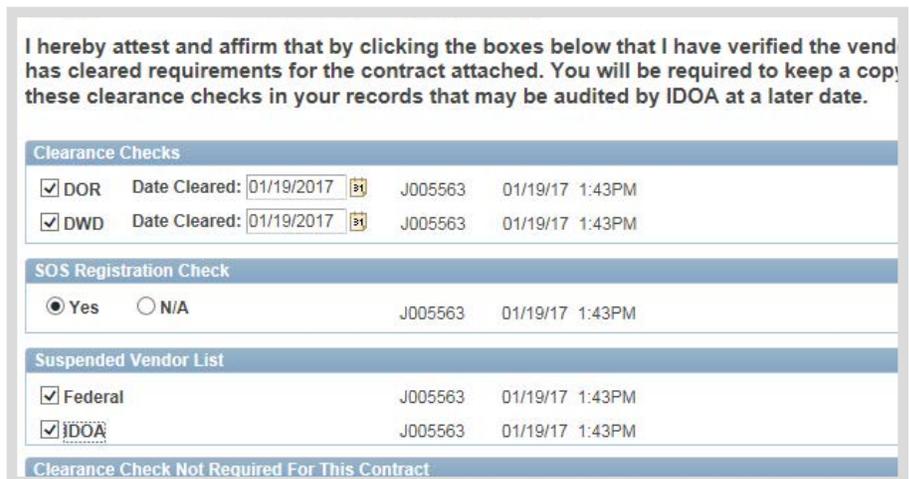
These checks and clearances are done outside of PeopleSoft SCM with the results documented manually. This process can be documented at any time but must be completed in order to proceed to Contract Approvals.

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

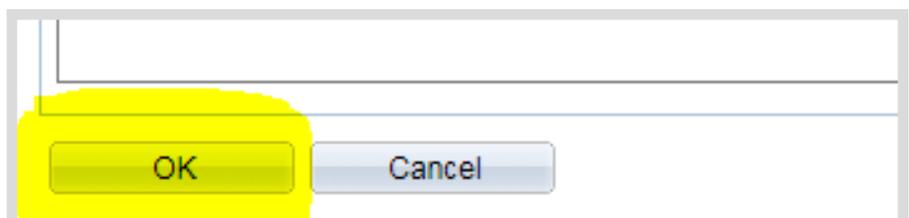


2. Use the checkboxes, radio buttons and date cleared fields to document clearance check procedures were followed

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.

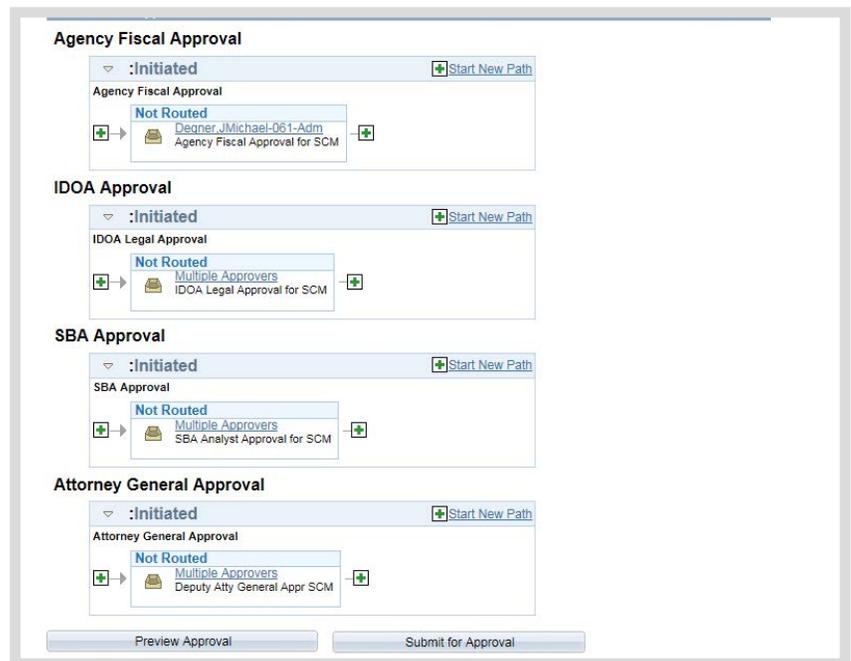


### 2. Review Approval Workflow

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**.



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.

# Phase 3: Execute the SCM Contract Document

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



## 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.

The screenshot shows the Document Management page with the following details:

- SetID: STIND
- Contract ID: 0000000000000000
- Vendor: KREAMO BAKERS
- Document Type: SOI Professional Services
- Description: testing
- Administrator: Pierce,William-067
- Sponsor: [blank]
- Department: 493006 IOT
- Version: 0.01
- Created On: 07/11/14 9:07AM
- Status: Approved
- Last Modified On: 07/11/14 10:47AM

The **Dispatch** button is highlighted in yellow.

**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.

The screenshot shows the Dispatch page with the following details:

- SetID: STIND
- Contract ID: 0000
- Vendor: KREAMO BAKERS
- Version: 0.01
- Administrator: Pierce,William-067
- Email: XXBPierce@jot.IN.gov
- Delivery Method: Manual
- Send as File Type: [blank]
- Preview button
- Subject: Documents for Review/Signature - Contract ID: 000000000000000000000013119

**Contacts**

| Selected                 | Contact ID | Name | Title | Email ID |
|--------------------------|------------|------|-------|----------|
| <input type="checkbox"/> |            |      |       |          |

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.)

- Click **No**
- Submit a **GMIS Issue**.

### 1. Click **Execute Contract**

|   |            |                   |          |
|---|------------|-------------------|----------|
| Version:  | 0.01       | Created On:       | 07/11/14 |
| Status:   | Dispatched | Last Modified On: | 07/12/14 |
| <input type="button" value="Redispatch"/>       |            |                   |          |
| <input type="button" value="Execute Contract"/> |            |                   |          |

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

**STOP**

If answered incorrectly, submit a GMIS issue immediately.

### 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.

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

|  |                    |                   |  |
|--|--------------------|-------------------|--|
| 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 <a href="#">Document D</a> |
| Status:  | Executed           | Last Modified On: | 07/12/14 2:08PM                            |
|  |                    | Executed On:      | 07/12/14 2:08:21PM                         |
| <input type="button" value="Reset to Dispatch"/> |                    |                   |  |
| <input type="button" value="Create Amendment"/>  |                    |                   |  |

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

