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 ................................................................. 4

### Considerations when Using the Importing Contracts and Amendments Manual ........................................................................................................ 5

### Financials Procedure Overview .............................................................................. 7

- Purchase that does require solicitation and an SCM contract ....................... 7
- Phase 1: Create the Transactional Contract Document ........................................... 7
  - Sample of Transactional Contract Document ...................................................... 8
- Phase 2: Upload the Text Contract Document(s) ................................................ 8
  - Importing Only the Original Contract/Document .............................................. 10
  - Importing the Original Contract/Document and One Amendment/Renewal ........................................ 10
  - Importing the Original Contract/Document and Multiple Amendments/Renewals ............................. 10
  - Sample of Imported Document Management Page ........................................ 10
- Phase 3: Update the Transactional Contract Document ........................................ 10
- Phase 4: Create the Text Contract Document ...................................................... 10
  - Step 1: Initiate the Text Contract Document ...................................................... 10
  - Step 2: Choose Configurator ID .......................................................................... 10
  - Step 3: Build the Text Contract Document ....................................................... 10
  - Document Management Page ............................................................................ 10
  - Step 4: Review/Edit the Text Contract Document ............................................... 10
    - Check Out the Text Contract Document .......................................................... 10
    - Edit the Text Contract Document ................................................................... 10
    - Save the Text Contract Document ................................................................... 10
    - Check In the Text Contract Document ............................................................ 10
  - Step 5: Supplemental Documents ....................................................................... 10
  - Step 6: Internal Collaboration ........................................................................... 10
    - Set up Internal Contact(s) ............................................................................. 10
    - Launch Internal Collaboration ....................................................................... 10
  - PeopleSoft Email Notifications ....................................................................... 10
  - Finalize Internal Collaboration ........................................................................ 10
  - Recreate Document (If Necessary) ................................................................. 10
  - Step 7: External Signer Set Up ........................................................................... 10
    - Find the Bidder ID through the Bidder File ..................................................... 10
Find the Bidder ID through the Vendor ID .................................. Phase4-22
Identify Existing External Signer’s User ID ............................... Phase4-23
Creating a New External Signer .............................................. Phase4-24
Assign the External Signer ................................................... Phase4-25
Step 8: Prepare Document for Signing ..................................... Phase4-26
Step 9: Upload the Prepared Document .................................... Phase4-28
Step 10: Send the SCM Contract Document for External Signature ........................................... Phase4-29
Step 11: Send the SCM Contract Document for Internal Signature ................................................ Phase4-32
Sign the SCM Contract Document on the State’s Behalf ................. Phase4-33
Set up Internal Contacts/Signers ........................................ Phase4-34
Route for Internal Signatures ............................................... Phase4-36
To Correct Internal Signature Errors ................................. Phase4-37
Step 12: Document Completion of Contract Clearance Checks ............................................. Phase4-39
Step 13: Send for SCM Contract Document Approvals (Workflow) ........................................ Phase4-40
Phase 5: Execute the SCM Contract Document .......................... Phase5-1
Step 1: Dispatch ........................................................................ Phase5-1
Step 2: Execute the SCM Contract Document ................................ Phase5-2
Step 3: Update Transactional Contract Document .......................... Phase5-4
Step 4: Copy Requisition to Existing Purchase Order ..................... Phase5-5
Record of Document Updates  ................................................ Update1-1
Version 18.08-06 .................................................................... Update1-1
Version 17.08-25 .................................................................... Update1-1
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?
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 to 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
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 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

![Image of PO Defaults](image)

6. Complete PO Defaults page

   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)

   ![Image of Tier 2 Details](image)

   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.

STOP These values are critical to route the SCM Contract Document through the correct approval workflow.
8. Click **Contract** tab

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

**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.

   **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.
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**

The Original EDS field is available to enter the EDS number as a reference.
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 Phase2-4

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

Complete actions on Phase2-5 through Phase 2-6

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

Complete actions on Phase2-7 through Phase 2-9
Importing Only the Original Contract/Document

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

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)

3. Click **Upload**

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

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

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

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.

8. Continue to Document Management Page on **Phase2-10**

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.
1. Select **Original and Amendment**

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)

3. Click **Upload**

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

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

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)
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.

10. Click **Done with Import**

    A warning pop-up box will appear.

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.

12. Continue to Document Management Page on **Phase2-10**

    **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.
1. Select **Original and Amendment**

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)

3. Click **Upload**

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

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

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.
     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.

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
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.
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 Image]

**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 |

<table>
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<th>Line Item</th>
<th>Description</th>
<th>Quantity</th>
<th>UOM</th>
<th>Unit Price</th>
<th>Ext Amt</th>
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<td>1.0000</td>
<td>ANN</td>
<td>1,250.000</td>
<td>1,250.00</td>
</tr>
</tbody>
</table>

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
   b. Update Maximum Amount to include the amendment/renewal amount if there is a change in funds
   c. Update Expire Date (if applicable)

2. Verify PO Defaults page
   a. Click PO Defaults hyperlink
   b. Verify Business Unit
   c. Verify Ship To
   d. Verify Dept
   e. Click OK

3. Click Save
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.

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

3. Click **Yes**
Step 2: Choose Configurator ID

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

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

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.
Step 3: Build the Text Contract Document

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

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

3. Leave Version as defaulted (do not change)

4. Add Comments (optional)

5. Click OK

6. Click OK to the Generation Error Message
Below is the updated Document Management Page.

Hover over the question marks to learn more about each item on the page.
Step 4: Review/Edit the Text Contract Document

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

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

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

5. Click **Save**

6. Click **Open**

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 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.

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.

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**Save the Text Contract Document**

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

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

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**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)
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**

5. Click any **hyperlink** in the row of the appropriate SCM Contract Document
   The Transactional Contract Document will open.
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 Document Management page when the Text Contract Document has been successfully uploaded.
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.

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.

5. Click **OK** when finished
   The screen will return to the Document Management page.

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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.
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 the search options. The Description field will populate with the name of the User ID entered/selected.

   ![Internal Contacts List](image)

   ![Collaboration Settings](image)

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.

Adding or Removing Collaborators

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

Click Delete (-) to remove a Collaborator.

5. Click OK
The screen will return to the Document Management page.

Launch Internal Collaboration

1. Click Route Internally

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

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.

The Document Management Page will open.

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

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

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

4. 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.

Your collaboration is requested for Document "000000000000000015033".

Set ID/BU: STIND
Document: 0000000000000000015033
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”.

Main Menu >> My System Profile

Verify that the correct email address is listed.
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 Phase4-5).

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 Amendment Configurator ID (if applicable)

3. Update response to IOT approval question
   ! Leave the Version as defaulted.

4. Enter Comments (if applicable)

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

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**
  - Complete Steps on Phase4-21

- **Find the Bidder ID through the Vendor ID**
  - Complete Steps on Phase4-22

- **Identify Existing Signer’s User ID**
  - 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](http://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**

2. Enter Bidder ID (10 Characters) or 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: EXS000000911) Do not create a new signer.

   ! 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 (Phase4-24) to create a new signer.

5. Click **OK**

6. Continue to Assign the Signer (Phase4-25)
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**

2. Enter Bidder ID (10 Characters)

3. Enter the signer’s first and last name

   ! 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.

4. Enter the signer’s email address

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.

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

6. Note the New User ID

7. Click **OK**
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.

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 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.
   
   !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

6. Click **OK**

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.
Step 8: Prepare Document for Signing

1. Click **Prepare Document for Signing**
   The Prepare Document for Signatures page will open.

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.

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.

4. Click **OK**
   to the usage rights for Adobe Reader pop-up message.

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

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.**

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.

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.

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### 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.
Step 10: Send the SCM Contract Document for External Signature

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.

5. Click OK

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**.
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.

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.

**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. 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.
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,

- 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.

If the Contract Administrator is not the Internal Signer,

- complete steps on Phase4-33
- complete steps on Phase4-34 through Phase 4-36
Sign the SCM Contract Document on the State’s Behalf

1. Click Sign Document (On Behalf)

Set up Internal Contacts/Signers

1. Click **Internal Contacts/Signers**

   ![Internal Contacts/Signers](image1)

   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

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Step 11: Send the SCM Contract Document for Internal Signature
5. Verify that the Visible Signer checkbox is checked

6. Click OK

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

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.

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

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.

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.
Phase 5: 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.

2. **Click OK**
   The status displayed on the Document Management page will update to Dispatched.
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**

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.
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.
Step 3: Update Transactional Contract Document

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)

2. Change status to Approved

3. Click **Save**
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](http://www.in.gov/idoa/2934.htm) 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