Indiana Department of Administration
PROCUREMENT DIVISION

SCM Creating Contracts/ Amendments Quick Guide

This is a quick reference tool.

For the full instructions and trouble shooting guide for SCM Creating Contracts and Amendments please refer to the Electronic Contracting web page.

Phase 1: The Transactional Contract Document

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

1. **Find the Contract ID**

2. **Review/Complete the Header Requirements**

   Begin Date defaults to Current Date - Needs Updated

   Use Agency BU in Front - This helps searches

   Enter the **Contract Administrator's User ID**

   Update **Begin Date**

   Enter the **Expire Date**

   Update **Description** if needed

   Maximum Amount

   Do not change if incorrect - Contact the user who awarded the event

   Populated from Sourcing Event

3. **Review the PO Defaults**

   Verify **Business Unit**

   Verify/Enter **Ship To**

   Enter **Dept** (Only for Imports)

   Chartfields

   Do not change if incorrect - make changes at requisition level

4. **Review the Line Items and Chartfields**

   $0.00 Dollar Contracts

   Use **Contract Categories**

   Do not select the Allow Open Item Reference checkbox

   UNSPSC = **01234567**

   Maximum Amount = **0.001**

   Imported Contracts

   Enter UNSPSC Category associated with the requisition line.

5. **Complete Tier 2 Details**

   Enter M/W/VBE Subcontractor Participation

6. **Save**

Phase 2: The Text Contract Document

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

1. Click **Add a Document**

2. **Choose Criteria to Build Template**
   - Select **Document Type**
   - Verify **Requisition Type**
   - Click **Create Document**

3. **Complete the Wizard Questions**

Fixing Wizard Questions

If a wizard question was answered incorrectly, click Recreate Document to restart.

4. **Review and Edit the Text Document**

   Update the Document

   Do not rename the file - Remember where you saved

   Check-Out, Review, Edit, Save, and Check-In

   Add Supplemental Documents

   Internal Collaboration
   Click **Internal Contacts/Signers,** Collaboration Settings tab

   Enter **User ID, Security,** click **OK**

   Once clicked, cannot remove collaborator from process

   Click **Route Internally**

   Verify, provide instructions, click **Route Internally**

   Click **Finalize Collaboration**

   Ensure there are no visible tracked changes on final document

   Review/Accept **Tracked Changes**

Collaboration Role

Collaborator = View Access

Edit/Check in = Edit Access

Edit option must have security set-up prior to selection.

5. Set up Signatories

Verify Contractor's Signatory Profile Set-up: Click Add External User

If Signatory could not be found, **Create New User**

Click **External Contacts/Signers**

Enter the **External User ID**

Enter the **Contact Name**

Enter the **Email**

Select 3 **checkboxes**: Allow Document View Access, Primary Document Owner, and Required to Sign

Click **OK**

> **Create External User For Electronic Signature**
>
> Bidder ID To 0000008345   Mac Slingerlend
> Copy: CIBER
>
> User Name:
>
> Email ID:
>
> **Existing External Signers**
>
> | | User ID | Name |
> |---|---|---|
> | 1 | EXS0000000835 | Beth Clark |

> **Tab out of Field**
>
> See previously created users. Do not create more than one profile.
>
> If more than one profile, submit GMIS Issue.

6. Prepare Document for Signing

Click Prepare Document for Signing

Click **OK** if external signers correct

Click **OK** to the pop-up

Open the Document to review

Save the PDF

7. Upload the Prepared Document

Click **Upload Prepared Document**

Browse to find the .pdf

Click **Upload**

Click **Yes** to the pop-up

> **Delivery Method Drop Down**
>
> Must be changed to **Email and Online Signatures**, otherwise vendor will not be able to sign the contract.

8. Vendor Signature

Click **Send to Contacts**

If Send to Contacts button is missing,
Check the External Contact set-up and ensure that Required to Sign check box is selected.

> **Send to Contacts**
>
> SetID: STIND
> Vendor: MILESTONE CONTR
>
> Version: 0.01
> Administrator: Jones,Sandy-067
> Email: XXsejones@iot.IN.gov
> Delivery Method: Email and Online Signatures
> Send as File Type: (Invalid Value)   Preview
>
> The Send as File type option only applies to Email Delivery Method and when signature document is not
>
> ☑ Current Documen
> ☐ Supplemental Do
> ☐ Related Documen
>
> ☐ Set to Checked O
> ☑ Send Copy to Adm

Change **Delivery Method** drop down to **Email and Online Signatures**

Click **OK**

> **If Multiple Internal Signers,**
>
> Must have a Sign Order

9. State's Signature

Click **Internal Contacts/Signers,** Signing Settings tab

Enter the User ID of the person signing

Select **Required to Sign Document** and **Visible Signer** checkboxes

Click **OK**

Click **Route for Internal Signatures**

Click **OK**

> **Internal Contacts List**
>
> Collaboration Settings | Signing Settings
>
> | *User | Required to Sign Document | Visible Signer | Sign Order | igning |
> |---|---|---|---|---|
> | P239057 | ☑ | ☑ | | |
>
> OK   Cancel

10. **Document Completion of Contract Clearance Checks**

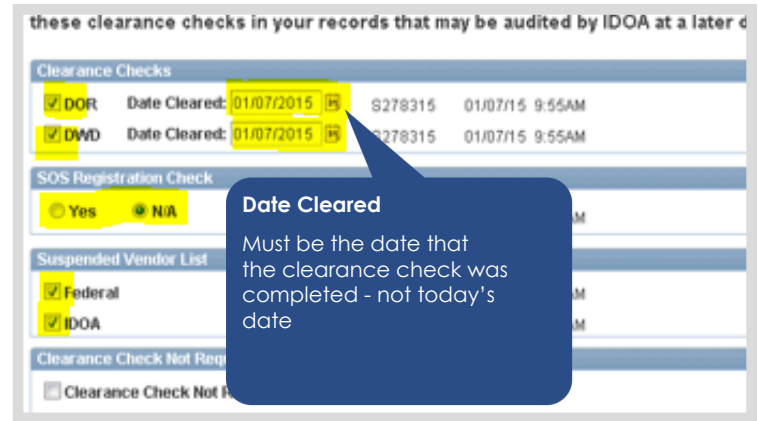   Click **Clearance Check**

    Verify DOR and DWD Clearance Checks

    Verify SOS Registration check

    Verify Suspended Vendor List

    Click **OK**

these clearance checks in your records that may be audited by IDOA at a later d

Clearance Checks
☑ DOR   Date Cleared: 01/07/2015   S278315   01/07/15 9:55AM
☑ DWD   Date Cleared: 01/07/2015   S278315   01/07/15 9:55AM

SOS Registration Check
○ Yes   ● N/A

Date Cleared
Must be the date that the clearance check was completed - not today's date

Suspended Vendor List
☑ Federal
☑ IDOA

Clearance Check Not Req
☐ Clearance Check Not R

11. **Contract Approvals (Workflow)**

    Click **Preview Approval** to review the Workflow Approval

    Click **Submit for Approval**

Phase 3: SCM Contract

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

1. **Dispatch**

    Click **Dispatch**

Do not make any changes to the Dispatch page ▶ Click **OK**

2. **Execute the Contract**

    Click **Execute Contract**

    Click **Yes** to post to Transparency Portal. Click **No** if the contract is not to be posted.

3. **Change Transactional Contract Document status to Approved**

Amendments/Renewals

After new Requisition is approved and budget checked

1. **Update the Transactional Contract Document**

   Change Status to **Open**

   Update **Maximum Amount**

   Update **Expire Date**

   Add/Insert new **Contract Line(s)** to represent new Requisition

   Click **Save**

2. **Create the SCM Amendment**

   Click **Maintain Document**

   Click **Create Amendment**

   Click **Yes**

   Select **Amendment Configurator ID:** and answer **Zero Amount Amendment**

   Input Amendment Amount Only if not zero

   Click **OK**

   Complete **steps 4-13 of Phase 2**