An oversight/agency Approver will review an SCM Contract Document after it has been signed by the vendor, the State agency and any other Approvers that came before him/her.

The Approver can review the contract, insert Approvers and approve or deny the SCM Contract Document.
Email Notification

Approval Email Notifications

Below is an example of an email an Approver will receive when the State’s Contract Administrator has sent the SCM Contract Document for review and approval. The User’s profile must have a valid email address with notifications turned on in PeopleSoft to be able to receive it.

Read the information for each (?) question mark to learn about each item.

The email’s subject line will include “Approval is Requested for Document” followed by the contract ID number.

The email will provide the document/contract ID number, the contract description, number of contract amendments, and the Contract Administrator.

This link is directed to the PeopleSoft login page. Log in to review and deny/approve the SCM contract. This link can be used to directly navigate to the specific contract provided in the email message.

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.
Find the Contract to Approve

Log in to PeopleSoft Financials

1. Enter the assigned user ID and password
2. Click the Sign In button

If there is trouble logging in or there are problems with the user ID or password, submit a GMIS issue.

Navigate to the Contract

There are three types of navigation...

From email

If the link provided in the Approver’s email was used to navigate to the PeopleSoft login page, once logged in the Document Management page for the Contract ID that was included in the email will open.

From Worklist

Click the Worklist link provided in the upper right hand corner of the PeopleSoft homepage to navigate to the Worklist page.

Resort the columns as needed by clicking the column headers to locate the appropriate contract ID that was provided.

Click the link provided and the Document Management page will open.

From Main Menu Navigation

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

Use the search criteria page to locate the appropriate contract ID that was provided.

Enter the Contract ID in the Contract ID field either as the full 25 digits or use the wild card % (example: %14374). Click Search, then click the document hyperlink.
Document Management Page

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

Below is the top half of the Document Management Page that is used to complete the approval process.

Read the information for each item.

<table>
<thead>
<tr>
<th>Document Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>SetID: STIND</td>
</tr>
<tr>
<td>Vendor: MILESTONE CONTRACTORS LP</td>
</tr>
<tr>
<td>Document Type: SSI Professional Services</td>
</tr>
<tr>
<td>Description: 061 build a walking bridge</td>
</tr>
<tr>
<td>Administrator: Poole, Kyle-00001</td>
</tr>
<tr>
<td>Sponsor:</td>
</tr>
<tr>
<td>Department: 039085</td>
</tr>
<tr>
<td>DOA - Management Info Systems</td>
</tr>
<tr>
<td>Status: Pending Approval</td>
</tr>
<tr>
<td>Created On: 05/05/16 11:21AM</td>
</tr>
<tr>
<td>Last Modified On: 05/05/16 1:07PM</td>
</tr>
</tbody>
</table>

This document requires your approval. Review the document as directed, then click Approve or Deny.

1. **This is the Contract ID number. Clicking the hyperlink will open the Transactional Contract Document.**

2. **The contract type, description, and Contract Administrator are displayed.**

3. **The SCM Contract Document status is Pending Approval.**

4. **Click the View Document button to review the contract.** Validate content including, but not limited to, Duties of Contractor, Consideration, Term, and Signatures.

5. **The Approve and Deny buttons are used to take the desired action.** Prior to taking an action, please review the document for detail/content.
Document Management Page Continued

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

Below is the bottom half of the Document Management Page that is used to complete the approval process.

Read the information for each item.

6 The Signing Details section provides information about actions completed by the Contract Administrator. These actions are displayed in reverse chronological order.

7 Click the View Document button to review the contract. Validate content including, but not limited to, Duties of Contractor, Consideration, Term, and Signatures.

8 Click the Add or Edit Supplemental Documents hyperlink to display documents added by the Contract Administrator. These may include, but are not limited to, documentation that explains the purchasing method and evaluation/award, minority or women business certification letters, clearance check results, email correspondence, research information and specifications/qualifications to consider. The documents can be accessed by clicking the View button on the corresponding line.

9 Click the Document Version History hyperlink to review the history of the contract. The history is displayed in reverse chronological order. It can be used to compare two documents at a time by clicking the checkboxes in the select column for the desired documents and clicking the Compare Word Documents button.

10 Click the Clearance Check hyperlink to display information affirmed by the Contract Administrator concerning the vendor passing the clearance requirements.
Review the Contract

Determine if the Contract should be Approved or Denied

Validate the contract content including, but not limited to, Duties of Contractor, Consideration, Term, and Signatures. Also verify that the tracked changes from the contract draft have not come forward to the final document.

1. Click View Document
   A pop-up will open, prompting the user to open or save the document.

2. Click Open

3. Review the Contract
   It is recommended to verify the accuracy of this document. Examples of areas to be verified include, but are not limited to: that the Vendor on the first page of the document matches the Vendor signatory and that the Agency signatory is valid.

4. Close the Document
   Return to PeopleSoft and log in if session timed-out.
Compare the Contract with its Previous Versions

Review the SCM Contract Original Drafts

1. Click **Document Version History**
   When a contract is modified, a new version number is assigned. The Document Version History shows a record of each version of the contract.

2. Select the **Versions** of the Contract to Compare
   Select a minimum of two versions.

3. Click **Compare Selected Word Documents**
   A pop-up will open, prompting the user to open or save the document.

4. Click **Open**

5. Review the **Changes** made between the **Versions**
   Use the Review Tab in Microsoft Word to click Next and Previous while reviewing the document changes.

6. Click **Return to Document Management** when finished with the comparison.
Insert Ad hoc Approvers

Adding Additional Approvers when Necessary

Ad hoc Approvers must have security to approve contracts. This is possible through either the Contract Administrator (SOI_CS_CONTRACT_AUTHOR) role or by requesting the SOI_CS_ADHOC_Approver role through a GMIS issue.

If an Ad hoc Approver needs to be added, the security must be set-up before you approve.

1. Click the Plus Sign
   This must be done prior to approving the document.

2. Find the User ID
   a. Click the Magnifying Glass
   b. Change the Name: drop down to Contains
   c. Enter the user's last name
   d. Click Search
   e. Select the appropriate User ID

3. Select the Insert Status
   Select Approver if the user will be required to take action or Select Reviewer if the user will need the ability to read the document, but not take action.

4. Click Insert

There is now an inserted Approver. Continue with the approval process instructions.
Approve or Deny the Contract

Submit the Decision

Prior to this section, review the contract and add any additional Approvers if the contract will be approved.

Approve the Contract

1. **Click Approve**
   - The Document Approval Status page will open.

2. **Add Comments at the bottom of the page if necessary**

3. **Click Approve to confirm**
   - The Contract Administrator will receive an email notification of this approval.
   - Warning: This is the last chance to cancel the approval process. Click Cancel if you want to return without approving.

Deny the Contract

1. **Click Deny**
   - The Document Approval Status page will open.

2. **Add Comments at the bottom of the page**
   - Comments are required when denying.

3. **Click Deny to confirm**
   - The Contract Administrator will receive an email notification of this denial.
   - Warning: This is the last chance to cancel the denial process. Click Cancel if you want to return without denying.