Indiana Department of Administration
PROCUREMENT DIVISION

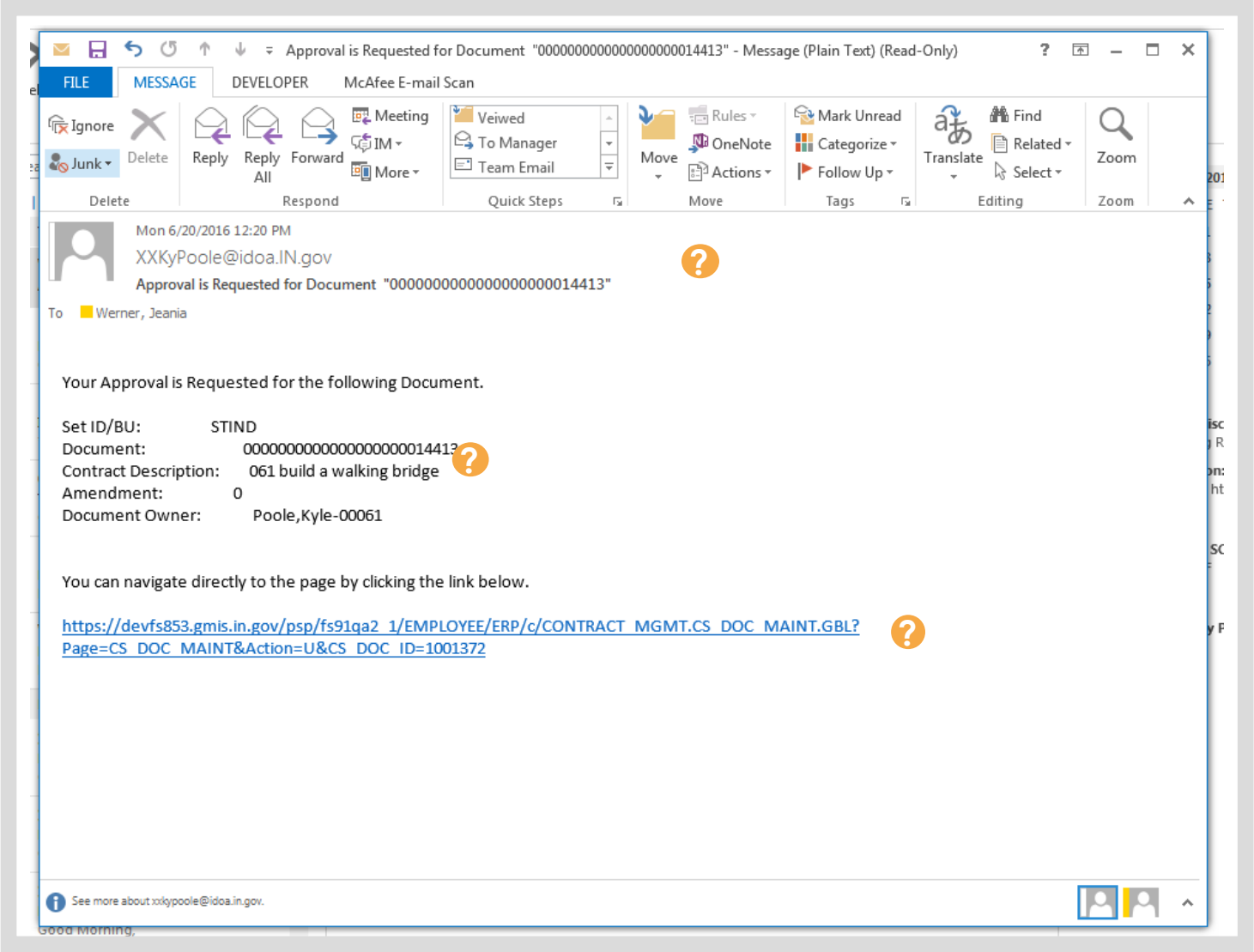
SCM Approval Process

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.

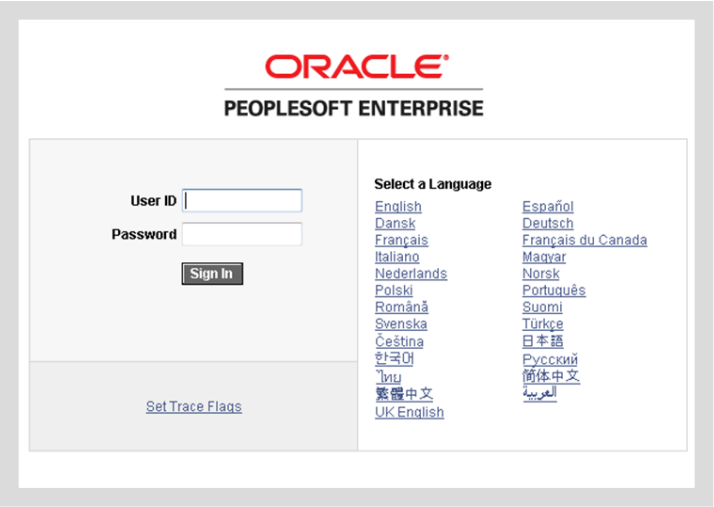
Hover over the ? question marks to learn more about each item in the email.



Find the Contract to Approve

Log in to PeopleSoft Financials

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



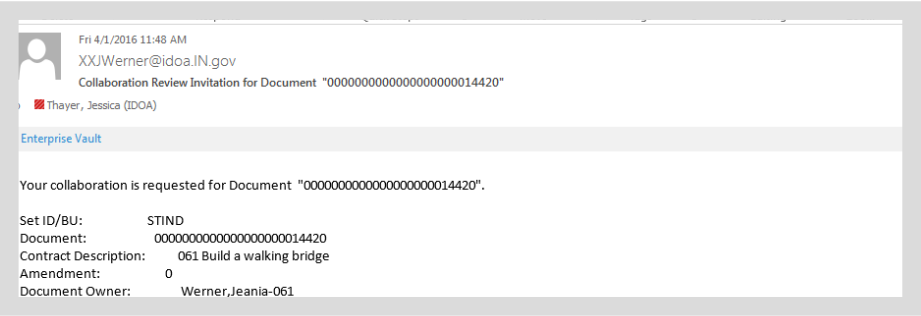
If there is trouble logging in or there are problems with the user ID or password, submit a GMIS issue.

Navigate to the Contract

There are three types of navigation...

From email

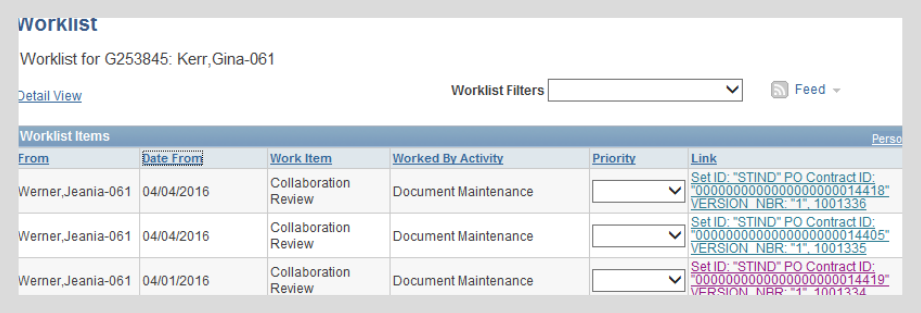
If the link provided in the approver's email was used to navigate to the PeopleSoft login page, once logged in the Document Management page for the Contract ID that was included in the email will open.



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.



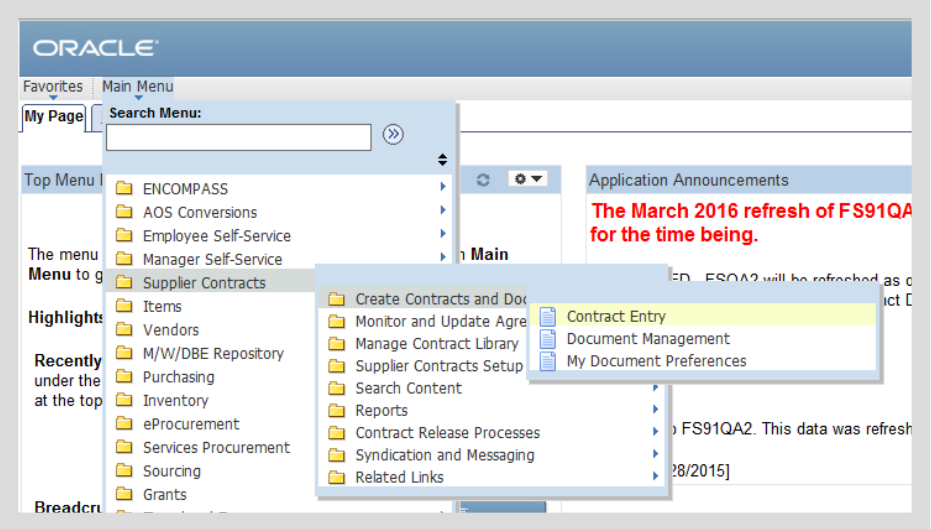
Click the link provided and the Document Management page will open.

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.

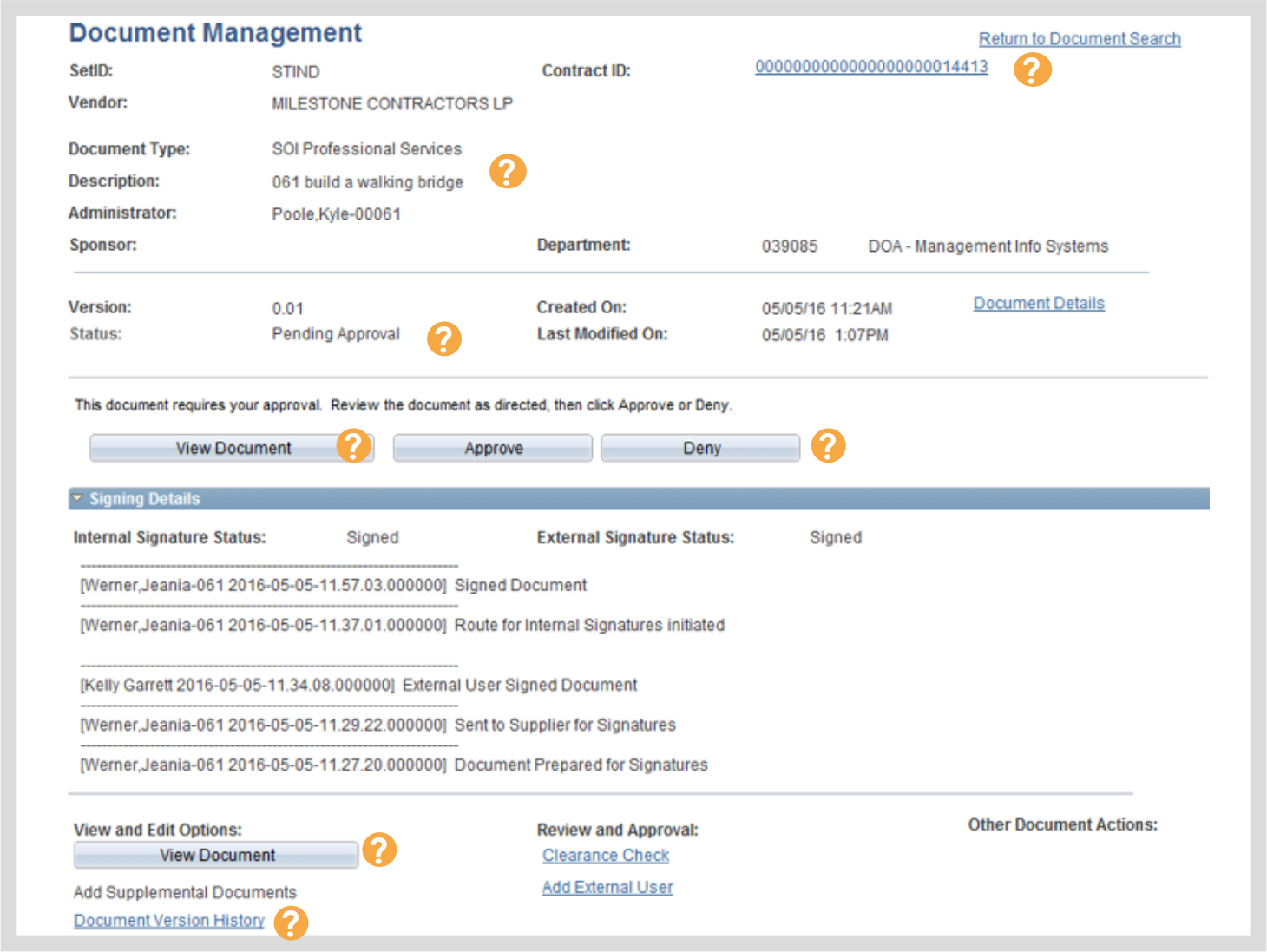


Document Management Page

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

Below is the Document Management Page that will be used to complete the approval process.

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



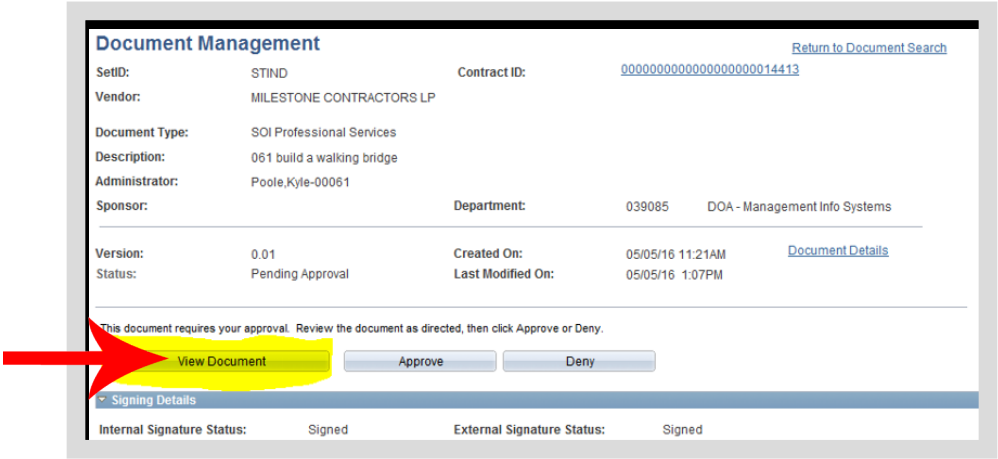
Review the Contract

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**

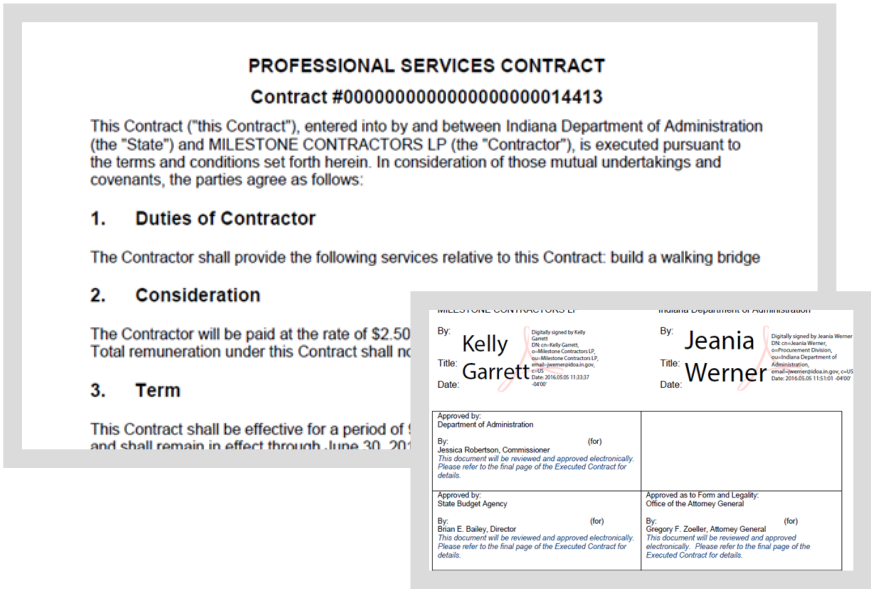
   A pop-up will open, prompting the user to open or save the document.



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.



PROFESSIONAL SERVICES CONTRACT

Contract #0000000000000000000014413

This Contract ("this Contract"), entered into by and between Indiana Department of Administration (the "State") and MILESTONE CONTRACTORS LP (the "Contractor"), is executed pursuant to the terms and conditions set forth herein. In consideration of those mutual undertakings and covenants, the parties agree as follows:

1. Duties of Contractor

The Contractor shall provide the following services relative to this Contract: build a walking bridge

2. Consideration

The Contractor will be paid at the rate of $2.50
Total remuneration under this Contract shall n

3. Term

This Contract shall be effective for a period of
and shall remain in effect through June 30, 20

By: Kelly Garrett
Title:
Date:

By: Jeania Werner
Title:
Date:

Approved by: Department of Administration
By: Jessica Robertson, Commissioner (for)
This document will be reviewed and approved electronically. Please refer to the final page of the Executed Contract for details.

Approved by: State Budget Agency
By: Brian E. Bailey, Director (for)
This document will be reviewed and approved electronically. Please refer to the final page of the Executed Contract for details.

Approved as to Form and Legality: Office of the Attorney General
By: Gregory F. Zoeller, Attorney General (for)
This document will be reviewed and approved electronically. Please refer to the final page of the Executed Contract for details.

4. Close the Document

   Return to PeopleSoft and log in if session timed-out.

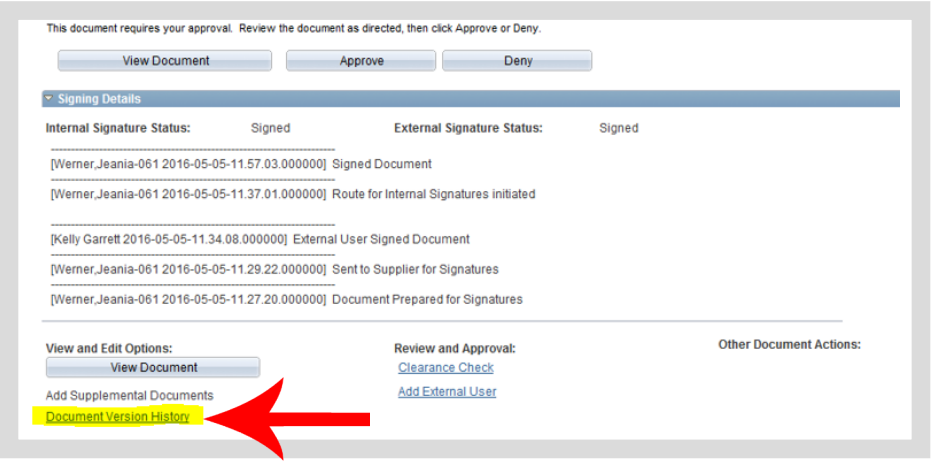
Compare the Contract with its Previous Versions

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.

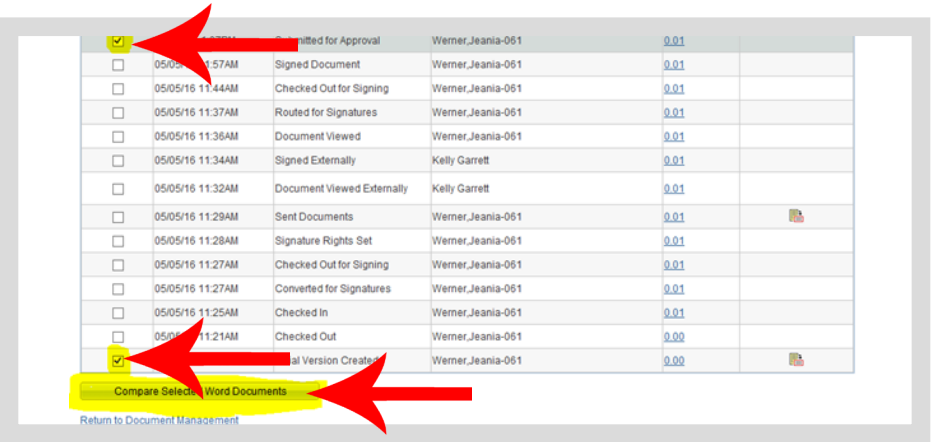


2. Select the **Versions** of the Contract to **Compare**

   Select a minimum of two versions.

3. Click **Compare Selected Word Documents**

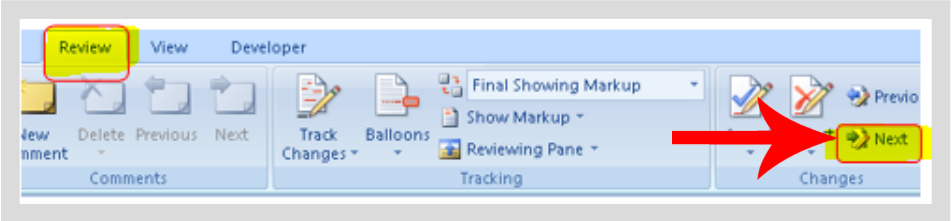
   A pop-up will open, prompting the user to open or save the document.



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

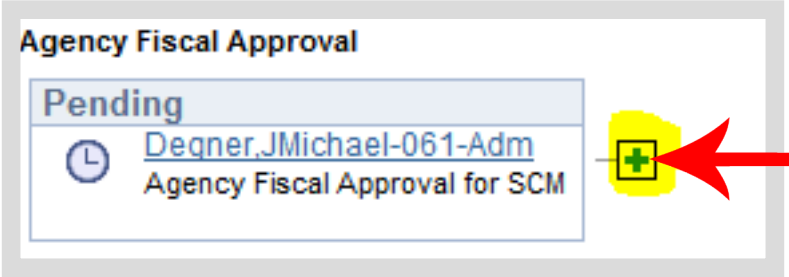
Adding Additional Approvers when Necessary

Ad hoc Approvers must have security to approve contracts. This is possible through either the Contract Author (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.



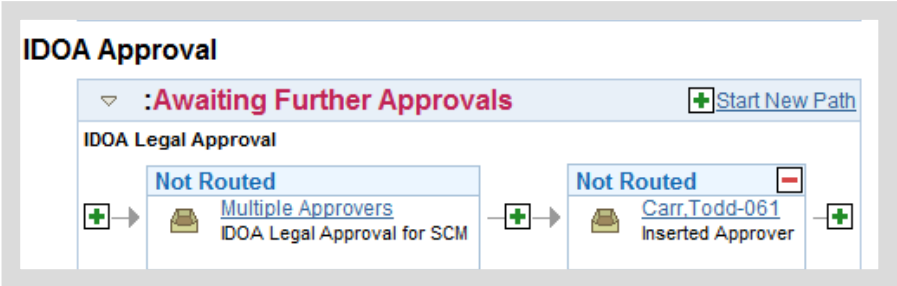
2. **Find the User ID**
   a. Click the **Magnifying Glass**
   b. Change the Name: drop down to **Contains**
   c. Enter the **user's last name**
   d. Click **Search**
   e. Select the appropriate **User ID**

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

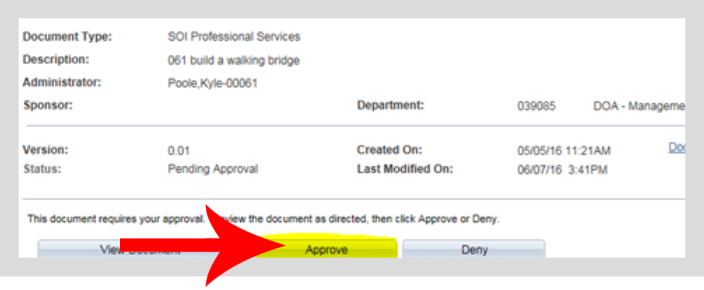
Submit the Decision

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

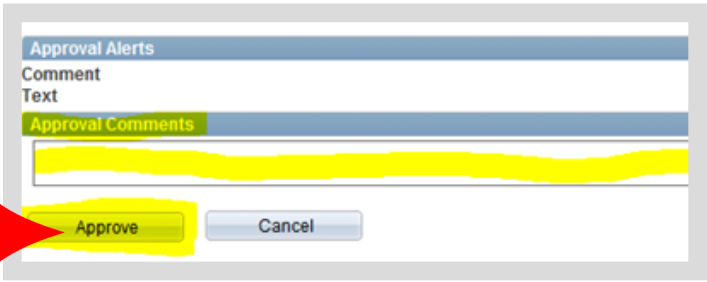
Approve the Contract

1. **Click Approve**

   The Document Approval Status page will open.



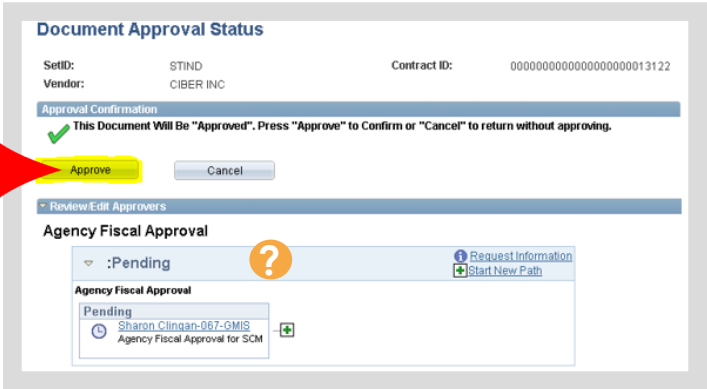
2. **Add Comments at the bottom of the page if necessary**



3. **Click Approve to confirm**

   The Contract Administrator will receive an email notification of this approval.

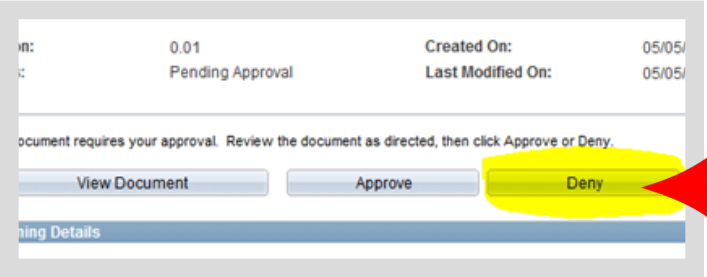
   Warning: This is the last chance to cancel the approval process. Click Cancel if you want to return without approving.



Deny the Contract

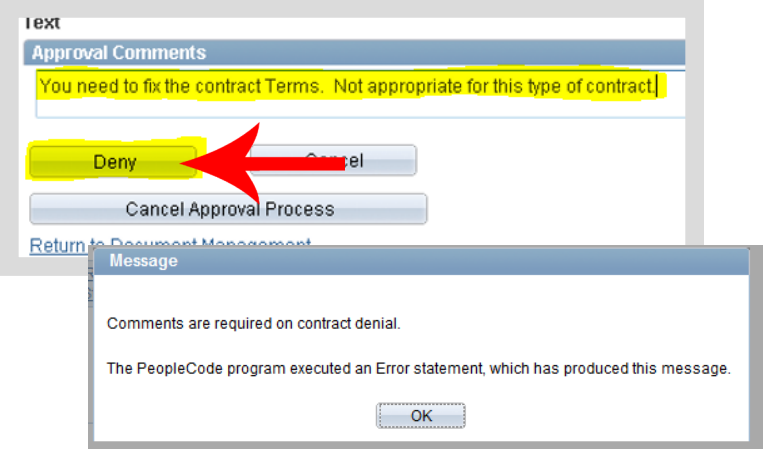
1. **Click Deny**

   The Document Approval Status page will open.

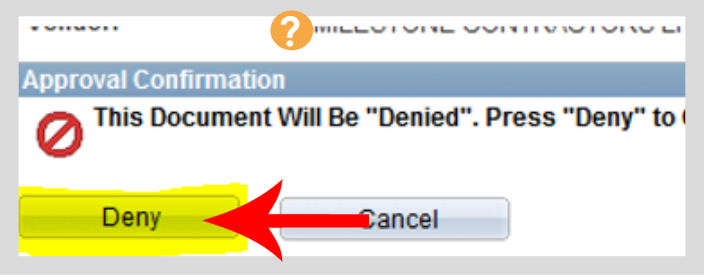


2. **Add Comments at the bottom of the page**

   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.