

# SCM MOU Guide

Version 19.05-01

#### This is a reference tool for MOUs.

For the full instructions and troubleshooting guide for SCM Creating Contracts and Amendments please refer to the <u>Electronic Contracting</u> web page.



## Phase 1: Complete the Transactional Contract Document



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

#### 1. Create the Transactional Document

Click **Add a New Value** tab Click **Add** 

#### 2. Complete the Header Requirements

Enter/Look up the Contract Administrator's User ID **Begin Date** Enter/Look up the **Vendor as the** defaults to Current State of Indiana (0000022460) Date - Needs Updated Enter/Adjust Begin Date Enter Expire Date Enter **Description** Use Agency **BU in Front** Enter the Maximum Amount as .001 (if nothing is to be encumbered) searches

Contract					
SetID: STIND Contract ID: NEXT *Status: Open	Copy From Cor Seq# Location	:	Contract Ver Version:	sion 1 Status: Approval Du	Current
Administrator/Buyer:	J005563	Q	Werner, Jean	tia-061	
<ul> <li>Header</li> </ul>					
Process Option: Vendor: Vendor ID: 'Begin Date: Expire Date: Renewal Date:	General Contract STATEOFIND-001 Q 0000022460 Q 01001/2017 F 12001/2017 F USD Q CRRNT Q	Vendor Search STATE OF INDIAN		Add Comments Contract Activities Primary Contact Info Contract Inseder Agreement Contract Releases Amount Summary	Activity Log Document Status Thresholds & Notifications
Currency: Primary Contact:	Q Contact			Maximum Amount: Line Item Released Amount:	0.000
Vendor Contract Ref:	Name:			Category Released Amount:	0.000
Description:	061 MOU			Open Item Released Amount:	0.000
Master Contract ID: Tax Exempt Political Subs Order Contract Options		٩		Total Released Amount:	0.000
Allow Multicurrency PO	Allow Open Item Re		_	Must Use Contract Rate Date	Rate Date: 01

#### 3. PO Order Contract Options

Click PO Defaults link

Enter/Verify Business Unit

Enter/Look up Ship To

Enter/Look up **Dept** (for routing purposes)

Click **OK** 

#### 4. Enter the Line Items and Chartfields

#### **Contract Category**

In Contract Categories area enter the category (UNSPSC) as 01234567



Details	Pricing Options Release Amounts Spend Thr	eshold 💷
Line	Category	Description
1	01234567	SCM \$0 Contrac

#### 5. Record M/W/IVOSB Subcontractor Participation

Click on the Tier 2 Details tab

Select Tier 2 Type: None

Click on the Contract tab

#### 6. Save

Note the Contract ID number

## 3

# Phase 2: Create the Text Contract Document

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

1. Initiate the Text Contract Document Click Add a Document

#### 2. Define the Document Type

Select Document Type SOI MOU2 Edit **Description** (if needed) Verify/Update Administrator Enter/Look Up Sponsor (if needed)

Verify/Update Department

Select Requisition Type Memo of Understanding

Click Create Document

#### 3. Create the Text Contract Document

Select the appropriate answer to "Does this contract require IOT approval?"

#### Click Next

Enter your **Agency Name** – the agency completing the MOU

Click Finish

#### **Fixing Wizard Questions**

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

#### 4. Review/Edit the Text Contract Document

#### Click Edit Document

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

#### Select Save As

Do not rename the file where you

#### Select the location to save the file Click Save

#### Click Open

Revise "State of Indiana" in the header to the agency with whom the MOU is being created

Insert the MOU language to reflect the terms appropriate for the agencies

#### Updating the Text Contract Document

Keep the header, the contract number and revise the remainder of the document as appropriate including exhibits and attachments.

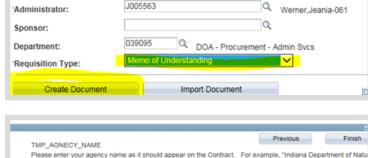
## MEMORANDUM OF UNDERSTANDING

#### 

orandum of Understanding ("Memorandum") is entered into by and be nt of Administration and STATE OF INDIANA. In consideration of the igs, the parties agree as follows:

#### Source: Purchasing Contracts R SetID: STIND Contract ID: 0 STATE OF INDIANA Vendor: SOI\_MOU2 Q Memorandum of Und Document Type: SOI - Memorandum of U Configurator ID: 061 MOU Description: J005563 Werner, Jeania-061 Administrator: Q Sponsor: 039095 DOA - Procurement - Admin Svcs Department: Requisition Type:

#### Previous Finish TMP AGNECY NAME Indiana Department of Natu Please enter your agency name as it should appear on the Contract. For example, Resources". Do NOT enter, (i.e. IN Dept of Natural Resources or DNR or IDOA.) Failure to do this may result in Contract rejection VCY NAME as outlined above DC





Previous

Finish

Revise "State of Indiana" in the In Witness Whereof, STATE OF INDIANA and the Indiana Department of Administration I through their duly authorized representatives, entered into this Memorandum. The parties, signature block to be the name of the having read and understood the foregoing terms of this Memorandum, do by their respectiv Agency with whom the MOU is being signatures dated below agree to the terms thereof created Accept/Reject all changes as STATE OF INDIANA Indiana Department of Administration appropriate By: By: Click Save Title Title: Click Check in Date Date: Click OK Click Browse Select the file to be uploaded Click Upload **Collaboration Role** Collaborator = View Access 5. Add Supplemental Documents Edit/Check in = Edit Access Edit option must have security set-up prior to selection. 6. Internal Collaboration Note that the actual signature field(s) which appear in the document are det Click Internal Contacts/Signers, Signature list Signing Settings Collaboration Settings tab Edit/ Ch Collaborated Description Enter User ID, Security, click OK Initial Once clicked, cannot remove Click Route Internally Cancel collaborator Verify, provide instructions, click Route from process Internally Ensure there are Review/Accept Tracked Changes no visible tracked changes on final Click Finalize Collaboration document **External Signer** There is no External Signer since both are State agencies

#### 7. Send the SCM Contract Document for Internal Signature

#### Set-up Internal Contacts/Signers:

Click Internal Contacts/Signers, Signing Settings tab If multiple Internal Signers, Confirm with the must have a Sign Order Enter/Look up the User ID for the Internal Signer from both agencies intended signers that they have Select Required to Sign Document and Visible Signer checkboxes for completed the both Internal Signers **Internal Signer** training, have Enter the Sign Order for both Internal access and are Collaboration Settings Signers authorized to sign Required to Visible Sign on behalf of the n Title \*User Sign Order Enter the Signing Title for both Internal Signer Document Agency. Signers T004326 Q 1 Director of Training and T < ~ Click OK J235664 Q Image: A start of the start of 2 Director I

OK

Cancel

#### 8. Prepare Document for Signing

Click Prepare Document for Signing

Validate Internal Signers are correct

Click **OK** if Internal Signers correct. Click **Cancel** to update if needed.

Click OK to the "You need to enable the usage rights for Adobe Reader..." warning message

#### 9. Save the Document

Click the drop down arrow to the right of Save

#### Select Save As

 Do not rename the file -Remember where you saved
 Select the location to save the file

 Click Save
 Open the document to review

 Close the PDF when the review is complete

#### 10. Upload the Prepared Document

#### Click Upload Prepared Document

Click **Browse** to find the PDF

Select the file to be uploaded

Click Upload

#### 11. Send the SCM Contract Document for Internal Signatures

Verify list of signers

Click Route for Internal Signature Enter Comments/Instructions for both signers Click OK

It is recommended to include the signature order and placement of signatures since agencies are accustomed to signing only on the right side of a contract.

#### 12. Document Completion of Contract Clearance Checks

Click Clearance Check

For agreements between State agencies, select Clearance Check Not Required and enter a corresponding comment.

Ар	nd for SCM Contract Document provals (Workflow)
It will only route to the Agency Fiscal and State	Click <b>Preview Approval</b> to review the Workflow Approval
Budget Agency approvers	Click Submit for Approval if correct

Agen I⊕⊣	Vot Routed Brenda Richey - 00061 Agency Fiscal Approval for SCM		
SBA App	proval		
$\bigtriangledown$	:Initiated	Start New Path	
SBA	Approval		
<b>+</b>	Not Routed Hilary Anne Alderete-057 SBA Analyst Approval for SCM		
	Preview Approval	Submit for Approval	
eturn to Doc	ument Management		

## Phase 3: Execute the SCM Contract Document

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

Contract Entry



#### 1. Dispatch



#### 2. Execute the SCM Contract Document

Click Execute Contract

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

- 3. Update the Transactional Contract Document status to Approved
- 4. Click Save