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## **End-User Training Guide**

**Course Code: SCM 205**

**Course: Departmental Supplier Contract  
Management**



## Course Overview

### Course Description

This course provides a comprehensive review of the Departmental Supplier Contract Management processes.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: Group Multi Supplier Contracts
- Module 3: Supplier Contracts
- Module 4: Document Management
- Module 5: Course Summary

### Training Audiences

The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related system access:

- Supplier Contract Collaboration Team Member
- GMS Approver
- Central Contract Admin (PCO)
- QA Specialist
- Librarian
- Librarian Approver
- Central GRI
- Supplier Contract Collaboration Team Member - central
- Departmental Contract Administrator

### Prerequisites

Participants are required to complete the following end-user Training courses prior to starting this course:

- ERP 101 – Overview of INFORMS
- ERP 102 – INFORMS Navigation, Reporting, and Online Help
- SCM 101 – Supply Chain Management Fundamentals

### Delivery Method

This course is intended to be delivered through Instructor-led Training.

### Estimated Duration

The total duration of this course, when delivered through Instructor-led Training, is 4.5 hours.



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## Module 1: Course Introduction

### Topics

#### **This module covers the following topics:**

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Key Changes to the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations, Activities, and Exercises



## Module 1: Course Introduction

### Course Administration and Logistics

To get the most benefit from this course, participants should:

- Actively participate in class, and ask questions as needed
- Turn off cell phones, and refrain from the use of email and the Internet
- Take breaks as scheduled and return to the classroom promptly



## Module 1: Course Introduction

### Learning Objectives

At the conclusion of this course, participants will have:

- Better understanding of the End-to-End Process for Departmental Supplier Contract Management
- Completed overview of Group Multi Supplier Contracts
- Set up Purchase Order Contracts
- Related PO contract to allocation
- Managed Contract Deliverables
- Set up Contract Releases
- Understood Document Management

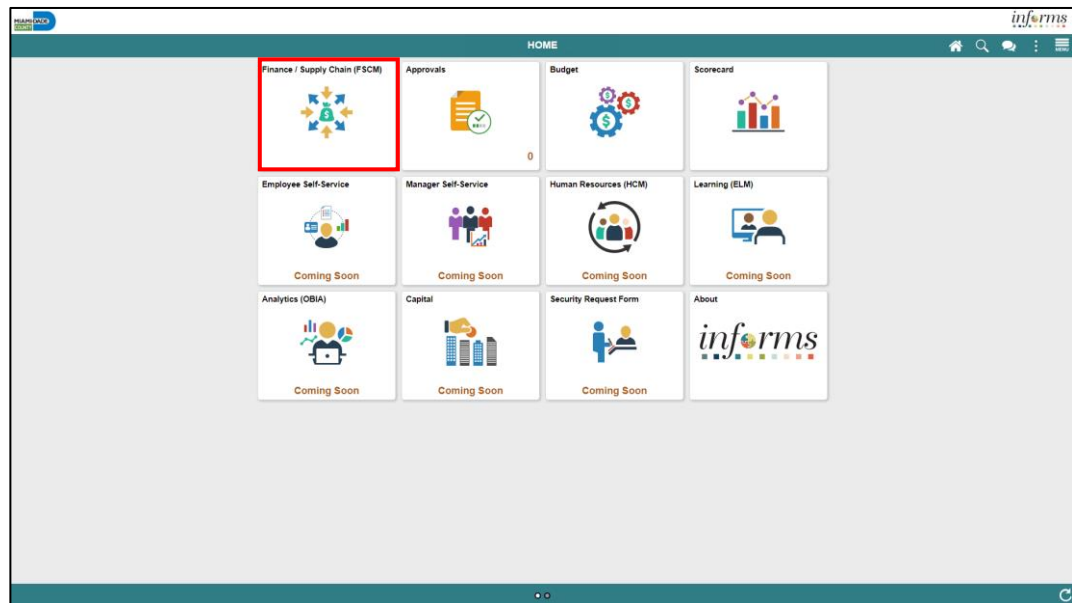


## Module 1: Course Introduction

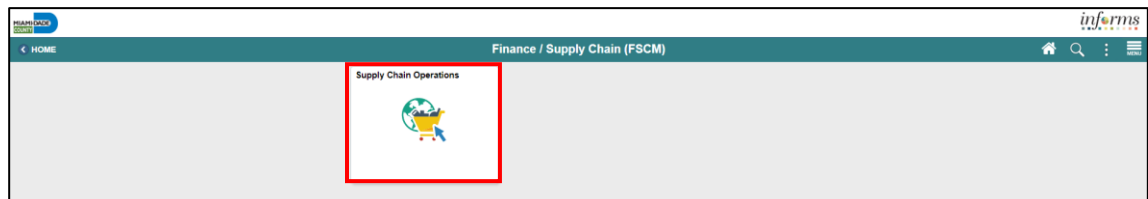
### Navigation

Below are the steps to navigate to the Supplier Contract Collection, which will be used for navigation in the rest of this course:

1. Login to INFORMS and select the **Finance/ Supply Chain (FSCM)** Tile from the home landing page below.



2. Select **Supply Chain Operations**.



3. Select **Supplier Contracts Center**.





## Module 1: Course Introduction

### Training Audience:

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

### Roles and Responsibilities

- **Department Contract Administrator:** The Department Contract Admin has the ability to create and manage a Supplier Contract.
- **QA Specialist:** The QA Specialist will have the ability to review and update the Group Multi Supplier Contract to ensure compliance with procurement governance.
- **Central GRI:** The Central GRI will assign and modify Grant Restriction Indicator (GRI) value on a Group Multi Supplier Contract.
- **Supplier Contract Collaboration Team Member:** The Supplier Contract Collaboration Team Member has the ability to collaborate and review contract documents.
- **Librarian:** The Librarian is responsible for creating and maintaining the contract clauses library.
- **Librarian Approver:** The Librarian Approver has the ability to approve clauses before they are available to be used in the system.
- **GMS Approver:** The GMS Approver has the ability to review and update the Group Multi Supplier Contract status to Approved, Canceled, Closed, on-hold and Open.
- **Central Contract Admin (PCO):** The Central Contract Admin has the ability to create and manage the Group Multi Supplier Contract and related Allocation and Contract data.



## Module 1: Course Introduction

### Key Changes to the Business Process

The INFORMS Supply Chain Management (SCM) provides the ability to manage the lifecycle of procurement of goods and services contracts. The modules provide the functionality to request, solicit, contract, procure, receive, and pay for goods and services.

The Key Changes to the Departmental Supplier Contract Management business process include:

- Supplier Contract:
  - DocuSign eSignature will be available to use to sign documents electronically
  - Document Collaboration functionality which includes routing of documents for comments and online editing
  - Contract Administrators will have the ability to establish the shell of transactional contract in INFORMS
- Sourcing:
  - Sourcing will be automated
  - Enhanced collaboration with key stakeholders
  - Automated approval notifications
  - Effective tracking of bidder participation and results

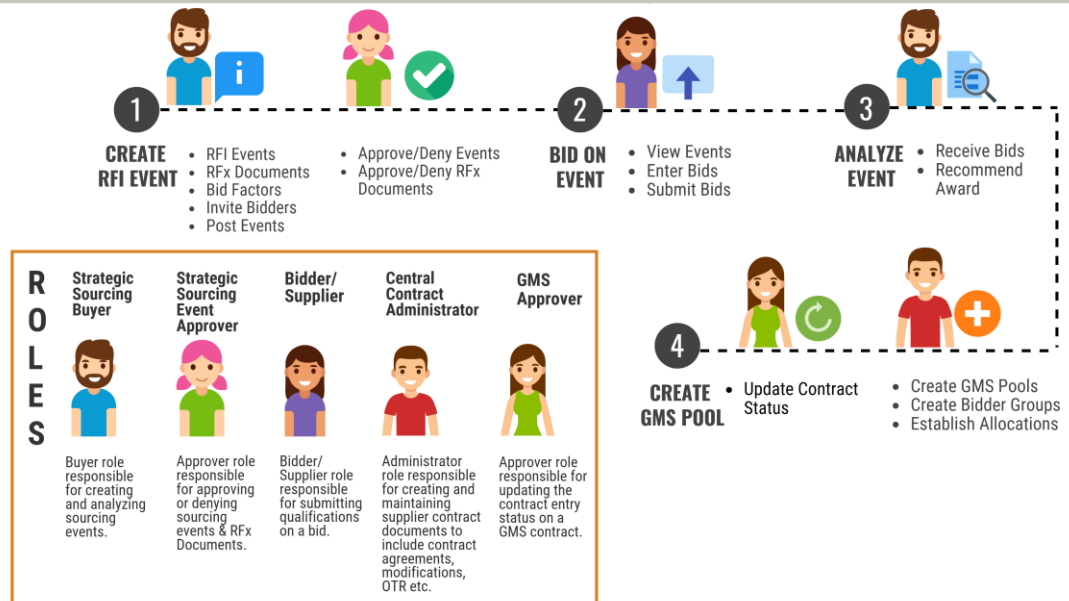


## Module 1: Course Introduction

### The End-to-End Business Process

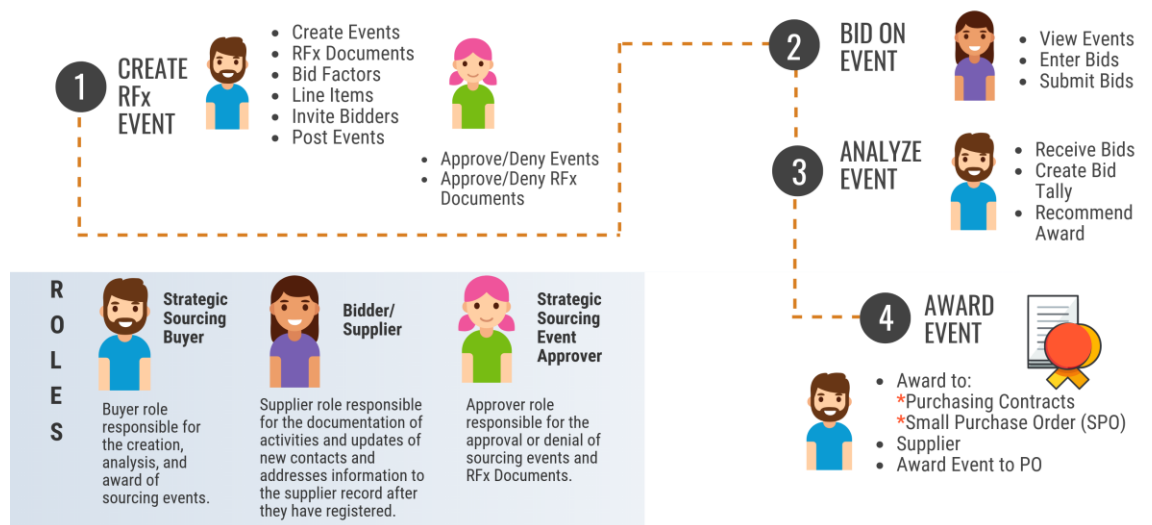
#### SOURCE TO CONTRACT (RFI) Business Process

This Source to Contract process covers the creation and analysis of a Request for Information (RFI) sourcing event and the creation of the Group Multi Supplier (GMS) Pool.



#### DEPARTMENTAL SOURCE TO CONTRACT (RFx) Business Process

This Source to Contract process covers the creation, analysis, and awarding of an RFx sourcing event and the creation of the Purchasing Contract.





## Module 1: Course Introduction

### Introduction to Demonstrations Activities, and Exercises

Users will take part in three types of hands-on learning throughout this course: Instructor Demonstrations, Training Activities, and Training Exercises. The definitions and descriptions of each are below.

### Instructor Demonstrations



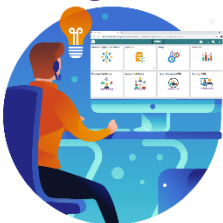
Instructor demonstration activities involve a walk-through of tasks and processes in INFORMS. Instructors will demonstrate how to perform these activities while users follow along.

### Training Activities



Users will perform tasks and processes in the INFORMS training environment by using the Training Activity and Data Sheet provided, and by using this training guide as a reference.

### Training Exercises



The Instructor will ask questions related to the lecture content and training activities, which are used to check users' knowledge and understanding of course content.



## Module 1: Course Introduction

### Module 1: Course Introduction Summary

This module covers the following topics:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Key Changes to the Business Process
- End-to-End Business Process
- Introduction to Demonstrations, Activities, and Exercises

The following key concepts were covered in this module:

- Group Multi Supplier Contract
- PO Contracts
- End-to-End Business Process for Document Management



## **Module 2: Group Multi Supplier Contract**

### **Lessons**

This module includes the following lesson:

- Overview of Group Multi Supplier Contracts



## **Lesson 1: Overview of Group Multi Supplier Contracts**

**Lesson 1:** At the conclusion of this lesson, users will be able to:

**Introduction**

- Understand Group Contracts Process Options



## Lesson 1: Overview of Group Multi Supplier Contracts

### Lesson 1: Introduction

The Group Contract feature enables the users to link multiple standards, manufacturers, or special purpose contracts to an overall parent or group contract for viewing and reporting purposes. These contracts are called Group Multi Supplier contracts.

Group Multi Supplier contracts provide the ability to view consolidated spend information across linked child contracts. When linking the child contracts to a Group Multi Supplier contract, the child contracts can be for different suppliers.

Like other Supplier Contracts, the Group Multi Supplier Contract works with supplier contract documents, agreements, and workflow notifications. The Process Option along with the contract style is used to distinguish the Group contracts and Special Purpose contracts from other types of Supplier Contracts. In addition, some links are controlled by the contract style. Group Multi Supplier Contract is a header level contract that does not allow for voucher or purchase order processing. This means that users cannot associate or link a Group Multi Supplier contract number to a Purchase Order or Voucher. Instead, the Child Contract is linked or associated to a Purchase Order or Voucher.



## Module 1: Course Introduction

### Lesson 1: Overview of Group Multi Supplier Contracts

#### Create a Group Multi Supplier Contract

The Group Multi Supplier Contract groups together related child contracts. All child contracts can have different suppliers. Since releases are not allowed against the Group Multi Supplier contracts, a Purchase Order or Voucher can only be associated with child contracts.

Navigate to the **Contract Entry** search page: **Finance/ Supply Chain > Supply Chain Operations > Supplier Contracts Center > Contract Entry**

**Contract Entry**

**Contract**

SellID: MDC  
 Contract ID: QS-07F-0638M-2  
 Contract Style: Accessed Contracts  
 Process Option: Group Multi Supplier  
 \*Status: Approved  
 Description: LAW ENFORCEMENT AND SECURITY E  
 Administrator/Buyer: BANDHUJ Bandhu, Janice  
 Version: 1  
 Status: Current  
 Begin Date: 05/11/2018  
 Expire Date: 09/22/2022  
 Approved Date: 05/21/2020  
 Renewal Date:  
 Currency: USD  
 Rate Type: CRRINT

[Add a Document](#)

[New Version](#)

[Contract Header Agreement](#)  
[Thresholds & Notifications](#)  
[Add Comments](#)  
[Activity Log](#)  
[Group Contract Summary](#)  
[MDC Allocations](#)  
[Custom Fields](#)

▼ **Related Contracts**

Add Related Contract: Total Released Amount: 0.00 USD

**Related Contracts**

	Contract ID	Relationship Status	Begin Date	Contract Style	Supplier	Total Released Amount	Currency	Document	Amendment	View Contra
1	0000000782	Active	05/11/2018	Purchase Order	REMOTEC INC	0.00	USD			



## Lesson 1: Overview of Group Multi Supplier Contracts

### Key Terms

The following key terms are used in this Lesson:



Term	Definition
<b>Amendment</b>	An amendment is a formal or official change made Supplier Contract.
<b>Contract Description</b>	Brief detail regarding the abouts of the contract.
<b>Contract ID</b>	An Assigned ID for each contract to improve traceability and unique to each contract.
<b>Contract Style</b>	Purchase Order, Sourcing and Ad-hoc are examples of Contract Style
<b>Supplier</b>	Organizations that are actively doing business or have done business in the past with the County, or otherwise receiving payments from the County. Supplier data is used in the following transactions: Sourcing Opportunities (RFPs, RFQs, etc.), contracts, requisition, purchase order entry, receiving/returning goods, voucher entry, payments for goods/services purchased.
<b>Supplier ID</b>	An Assigned ID for each Supplier for traceability and unique to each supplier



## Lesson 1: Training Activity 1

**Demonstration** The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

**Instructions** Please refer to Activity 1 on the SCM 205 Training Activity and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 205 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available if users have questions.



## Lesson 1: Training Exercise

### Debrief



1. Can a Group Multi Supplier Contract be used on a Purchase Order or Voucher?

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2. Will a Supplier ID in INFORMS be the same Vendor ID that was used in FAMIS?

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## Lesson Summary



- 18



## Module 3: Supplier Contracts

### Lessons

This module includes the following lessons:

- Enter Supplier Contract Details
- Create Contract Lines
- Relate Contract to Group Multi Contract-Customization



## Lesson 1: Enter Supplier Contract Details

**Lesson 1:** At the conclusion of this lesson, users will be able to:

### Introduction

- Enter Supplier Contract Header Details
- Copy Existing Contract Details
- Create and Maintain Spend Thresholds and Notifications



## Lesson 1: Enter Supplier Contract Details

### Lesson 1: Introduction

The INFORMS Supplier Contracts module enables users to create and execute contracts between a department and County suppliers for any agreed goods and services to be purchased. This application will allow the users to define products on a contract and specify the terms and conditions. Supplier Contracts can be established through the awarding of a Sourcing Event response or as a child contract from a previously existing Group Multi Supplier contract.

The INFORMS Supplier Contracts module allows a number of user-defined contract statuses. These statuses help User manage the contract life cycle, trigger an email notification when a status change occurs, and enforce contract security.



## Lesson 1: Enter Supplier Contract Details

### Key Terms

The following key terms are used in this Lesson:



Term	Definition
<b>Amendment</b>	An amendment is a formal or official change made Supplier Contract.
<b>Invoice</b>	Is a commercial document that itemizes and records a transaction between a buyer and a seller.
<b>Supplier</b>	Organizations that are actively doing business or have done business in the past with the County, or otherwise receiving payments from the County. Supplier data is used in the following transactions: Sourcing Opportunities (RFPs, RFQs, etc.), contracts, requisition, purchase order entry, receiving/returning goods, voucher entry, payments for goods/services purchased.
<b>Threshold</b>	A limit at a specified amount in the contract that could trigger an alert or notification



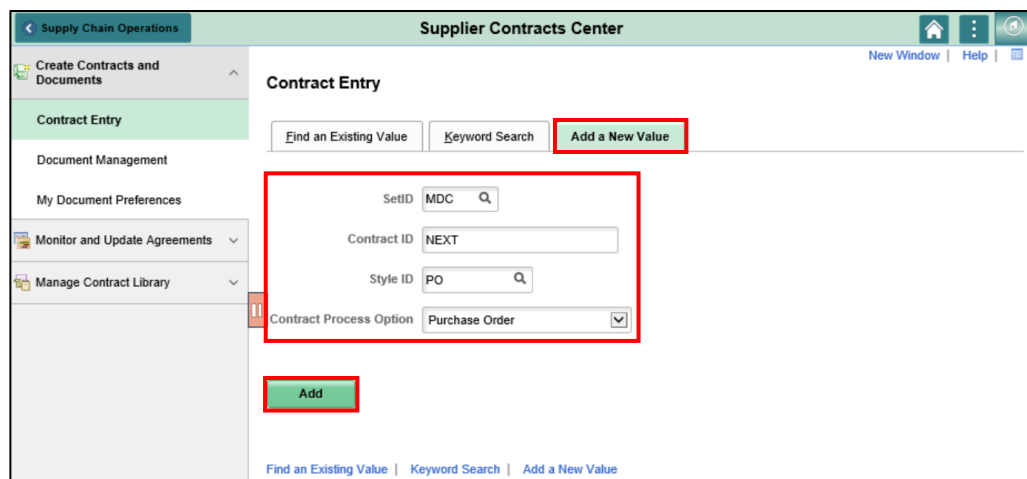
## Lesson 1: Enter Supplier Contract Details

### Lecture 1: Enter Supplier Contract Header Details

The INFORMS Supplier Contract Entry Page is comprised of four main sections:

Contract Details, Contract Header, Contract Items, and Contract Categories.

1. To create a Supplier Contract, navigate to: **Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contracts Center**
  2. Select the **Contract Entry** from the **Create Contracts and Documents** menu.
  3. Select the **Add a New Value** tab, **Style ID**, and **Contract Process Option**.
- **Note:** SetID will default to MDC and Contract ID will default to NEXT. These values should not be changed. The only SetID value is MDC and the Contract ID should be auto generated by keeping NEXT in the Contract ID field.



The screenshot shows the 'Supplier Contracts Center' interface. On the left is a navigation menu with 'Create Contracts and Documents' expanded, showing 'Contract Entry', 'Document Management', and 'My Document Preferences'. Below this are 'Monitor and Update Agreements' and 'Manage Contract Library'. The main area is titled 'Contract Entry' and has three tabs: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value' (which is highlighted with a red box). The 'Add a New Value' tab contains a form with the following fields: 'SetID' (MDC), 'Contract ID' (NEXT), 'Style ID' (PO), and 'Contract Process Option' (Purchase Order). A red box highlights the 'SetID', 'Contract ID', 'Style ID', and 'Contract Process Option' fields. Below the form is a green 'Add' button, also highlighted with a red box. At the bottom, there are links for 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'.

4. Within the **Contract Entry** section, users will be able to enter and review the **Contract ID, Status, Administrator/Buyer, Contract Version, and Approval Due Date**.



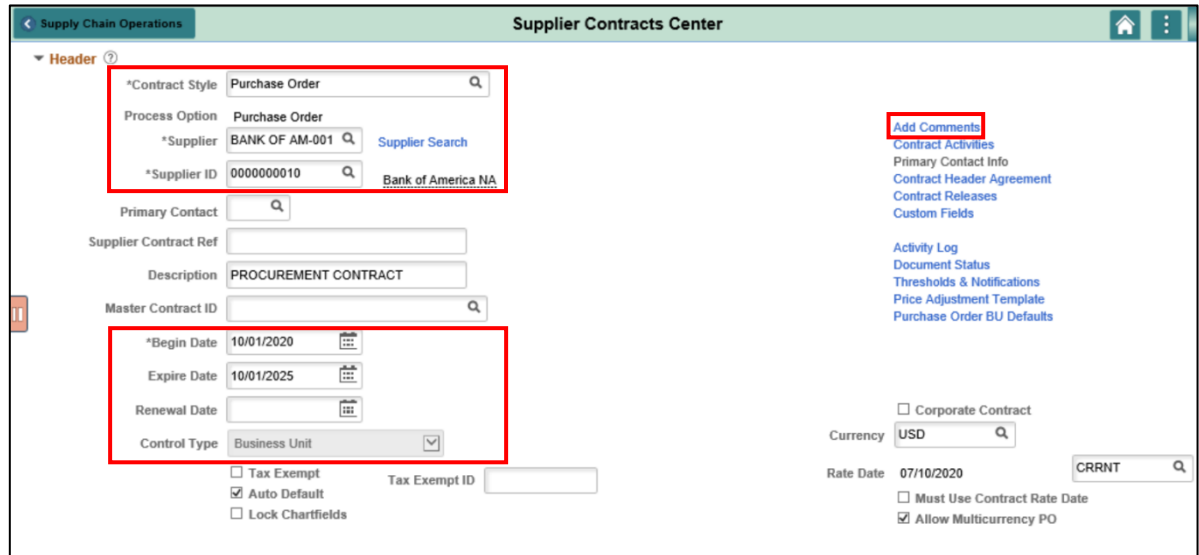
The screenshot shows the 'Supplier Contracts Center' interface with the 'Contract' tab selected. The 'Contract Entry' section is active. The form displays the following details: 'SetID' (MDC), 'Contract ID' (NEXT), 'Status' (Open), 'Administrator/Buyer' (MD\_PO\_DPT\_BUYER), 'Contract Version' (1), and 'Approval Due Date' (10/01/2020). A red box highlights the 'SetID', 'Contract ID', 'Status', 'Administrator/Buyer', 'Contract Version', and 'Approval Due Date' fields. To the right of the form are buttons for 'New Version' and 'Add a Document'. The top navigation bar includes 'Supply Chain Operations', 'Supplier Contracts Center', and links for 'New Window', 'Help', and 'Personalize Page'.



## Lesson 1: Enter Supplier Contract Details

### Lecture 1: Enter Supplier Contract Header Details

- Next, enter or review the **Contract Header Details** which outline the **Contract Style**, **Supplier ID** (10 Digit ID Number), **Description** (Free Form Text Field), **Begin and End Dates**, and Comments (Comments are first added by clicking on the **Add Comments** hyperlink).



The screenshot displays the 'Supplier Contracts Center' interface. The 'Header' section is expanded, showing various fields for contract details. Two red boxes highlight specific areas: one around the supplier information fields and another around the date and control type fields.

**Supplier Information Fields (Red Box 1):**

- \*Contract Style: Purchase Order
- Process Option: Purchase Order
- \*Supplier: BANK OF AM-001 (with a search icon and a 'Supplier Search' link)
- \*Supplier ID: 0000000010 (with a search icon and a 'Bank of America NA' link)

**Date and Control Fields (Red Box 2):**

- \*Begin Date: 10/01/2020 (with a calendar icon)
- Expire Date: 10/01/2025 (with a calendar icon)
- Renewal Date: (with a calendar icon)
- Control Type: Business Unit (dropdown menu)

**Other Fields and Options:**

- Primary Contact: (with a search icon)
- Supplier Contract Ref: (text field)
- Description: PROCUREMENT CONTRACT
- Master Contract ID: (with a search icon)
- Tax Exempt: ☐ Tax Exempt, ☒ Auto Default, ☐ Lock Chartfields
- Tax Exempt ID: (text field)
- Corporate Contract: ☐ Corporate Contract
- Currency: USD (with a search icon)
- Rate Date: 07/10/2020 (with a search icon)
- Must Use Contract Rate Date: ☐ Must Use Contract Rate Date
- Allow Multicurrency PO: ☒ Allow Multicurrency PO

**Right Sidebar (Add Comments):**

- Add Comments** (highlighted with a red box)
- Contract Activities
- Primary Contact Info
- Contract Header Agreement
- Contract Releases
- Custom Fields
- Activity Log
- Document Status
- Thresholds & Notifications
- Price Adjustment Template
- Purchase Order BU Defaults



## Lesson 1: Enter Supplier Contract Details

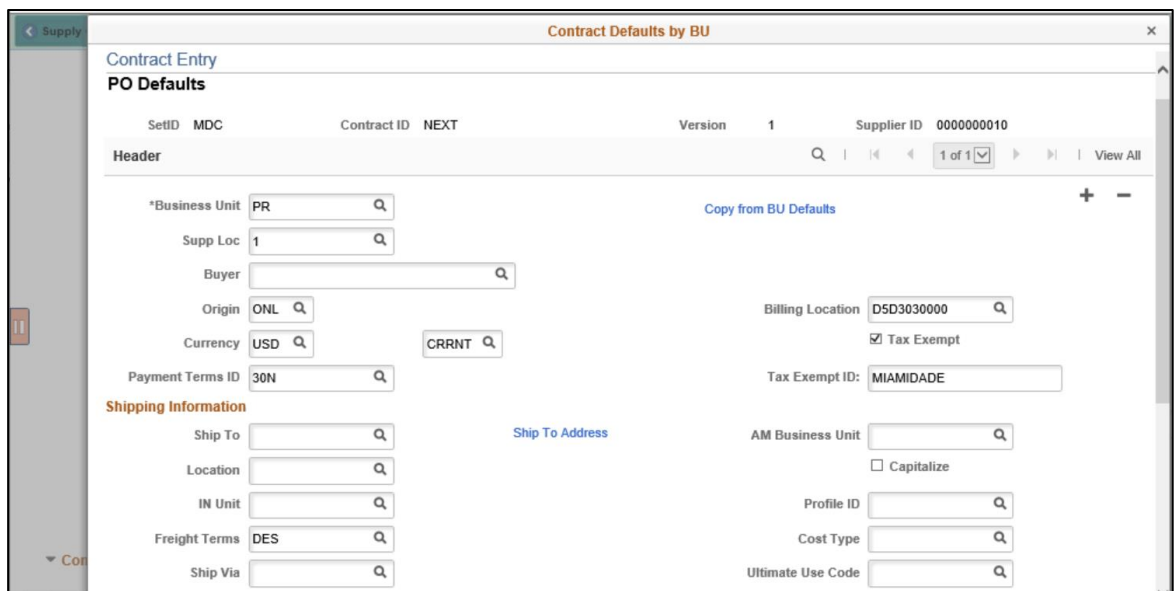
### Lecture 1: Enter Supplier Contract Header Details

6. In the Contract Controls section, each department will enter their own **Business Unit** on the Supplier Contract so that no other Business Unit will be able to use this Supplier Contract. Users have the ability to procure the items identified in the Contract Lines.



The screenshot shows the 'Supplier Contracts Center' interface. Under the 'Contract Control' section, the 'Business Unit' table is displayed. The table has columns for 'Business Unit' and 'Description'. A red box highlights the 'Business Unit' field in the first row, which contains the value 'PR'. The description for this unit is 'Parks & Recreation'.

	*Business Unit	Description
1	PR	Parks & Recreation



The screenshot shows the 'Contract Defaults by BU' interface. The 'PO Defaults' section is active, displaying various fields for setting defaults. The 'Business Unit' is set to 'PR'. Other fields include 'Supp Loc' (1), 'Buyer', 'Origin' (ONL), 'Currency' (USD), 'Payment Terms ID' (30N), 'Billing Location' (D5D3030000), 'Tax Exempt' (checked), 'Tax Exempt ID' (MIAMIDADE), 'Ship To', 'Location', 'IN Unit', 'Freight Terms' (DES), 'Ship Via', 'AM Business Unit', 'Profile ID', 'Cost Type', and 'Ultimate Use Code'.

Users will also have the ability to set default **Header**, **Shipping**, and **Distribution** values on Purchase Orders created from the contract through the **Purchase Order BU Defaults** for each of the contract associated with business units. When a Purchase Order Buyer copies a Contract into a Purchase order, these values will automatically default, so double entry will not be needed.

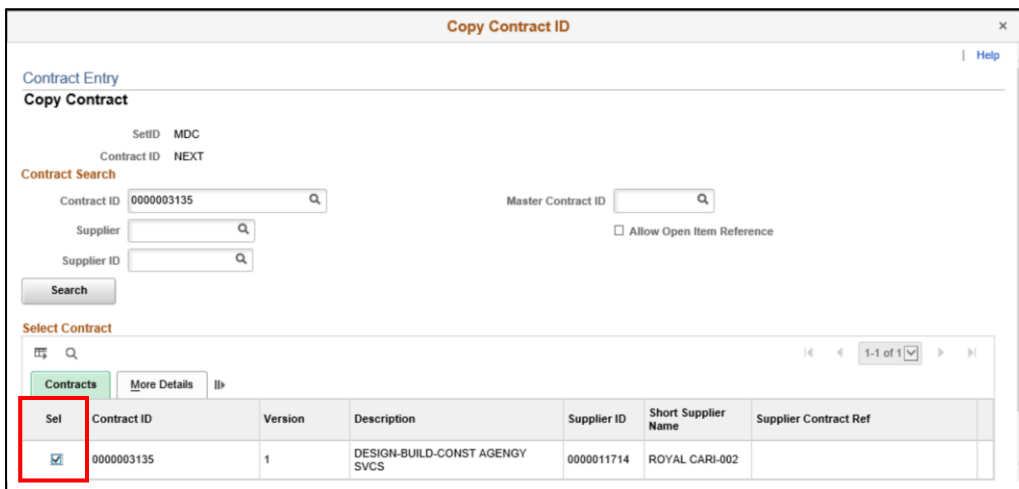


## Lesson 1: Enter Supplier Contract Details

### Lecture 2: Copy Existing Contract Details

The INFORMS Supplier Contract module provides a tool to assist users with entering similar or multiple contracts with the same header details. By searching and selecting an existing **Contract ID** to copy, users can minimize the amount of time needed to repeat similar or related data entry points for a new Supplier Contract's Header Details. Even if a user needs to change a handful of values on the copied contract, it is still advantageous to copy a Contract that has already been created to reduce data entry.

1. When creating a new Supplier Contract, select the **Copy From Contract** hyperlink.
2. Users will be directed to a page to help them identify a specific **Contract ID** they wish to copy or all of the Contract IDs for a given Supplier.



**Copy Contract ID**

Contract Entry

**Copy Contract**

SetID MDC  
Contract ID NEXT

**Contract Search**

Contract ID 0000003135  
Supplier  
Supplier ID  
Search

Master Contract ID  
Allow Open Item Reference

**Select Contract**

Contracts More Details

Sel	Contract ID	Version	Description	Supplier ID	Short Supplier Name	Supplier Contract Ref
<input checked="" type="checkbox"/>	0000003135	1	DESIGN-BUILD-CONST AGENCY SVCS	0000011714	ROYAL CARI-002	



## Lesson 1: Enter Supplier Contract Details

### Lecture 3: Create and Maintain Spend Thresholds and Notifications

In INFORMS, Supplier Contracts users will have the ability to set a **Spend Threshold** or a specific monetary amount for a contract or contract item. When Spend Threshold is defined, the system can notify users when spending on a transactional contract crosses the threshold amount.

The Spend Threshold is available at the contract header, contract line, and contract category levels. The notification is a standard INFORMS workflow event that is triggered through the application engine program.

In addition to the worklist, INFORMS can e-mail notifications. E-mail notifications are triggered using the same conditions as workflow notifications. The decision to create a worklist, send an e-mail, or to do both depends on the user-profile workflow-routing preferences.

A single notification is sent when the amount reaches the threshold. If the user changes the Spend Threshold amount on the header or a line, INFORMS deletes existing notifications on the header or the changed line and reevaluates the threshold when the user runs the application engine job again. This action enables the user to keep increasing the Spend Threshold amount and to be notified as necessary.

To set up INFORMS to process contract-level Spend Threshold amounts:



## Lesson 1: Enter Supplier Contract Details

### Lecture 3: Create and Maintain Spend Thresholds and Notifications

1. Access the **Contract Entry - Contract Page** and select the **Thresholds & Notifications** link.

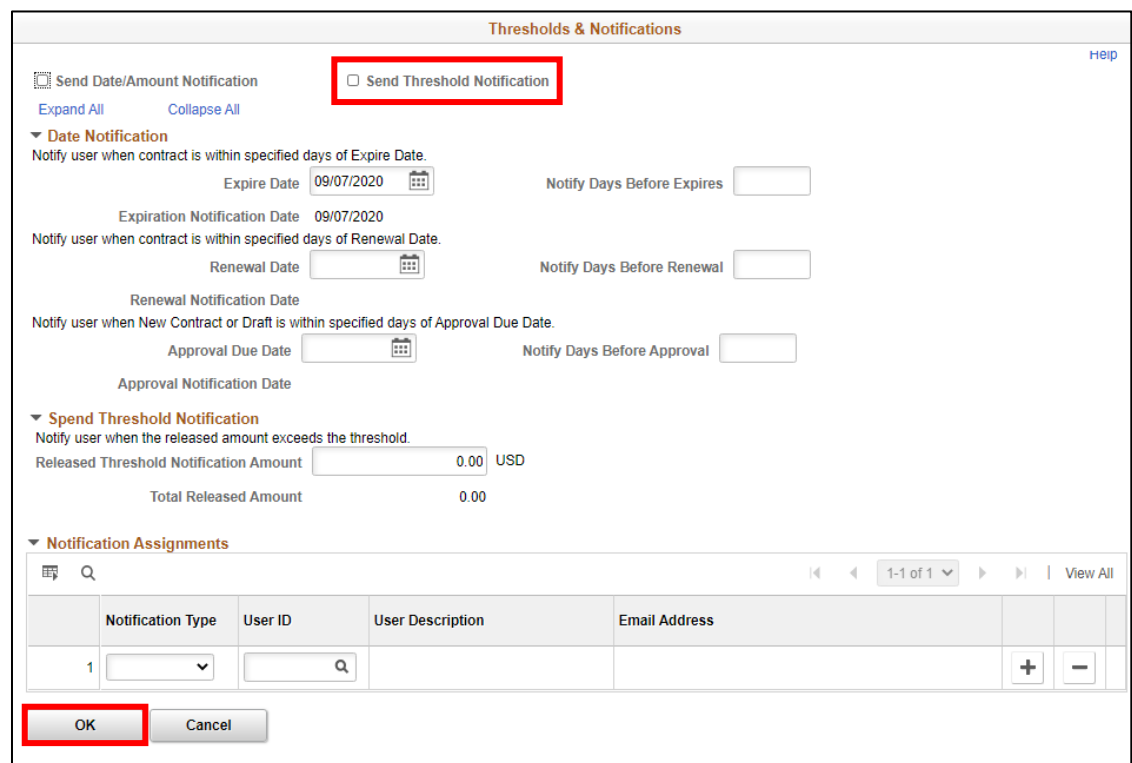


Contract Entry - Contract Page

Contract Header Agreement  
**Thresholds & Notifications**  
 Add Comments  
 Activity Log  
 Group Contract Summary  
 MDC Allocations  
 Custom Fields

Expire Date 09/07/2020  
 Approval Due Date  
 Renewal Date  
 Currency USD  
 Rate Type CRRNT

2. Select the **Spend Threshold Notification** check box.
3. Define the threshold amount.
4. Select the notification type and at least one user to whom the user wants to send notifications.
5. Use the **Notification Assignments** grid to make these selections. Examples of notification types include **maximum amount**, **renew**, and **draft due** notifications.
6. Select **OK**.



Thresholds & Notifications

Send Date/Amount Notification ☐ Send Threshold Notification

Expand All Collapse All

▼ Date Notification  
 Notify user when contract is within specified days of Expire Date.  
 Expire Date 09/07/2020 Notify Days Before Expires  
 Expiration Notification Date 09/07/2020  
 Notify user when contract is within specified days of Renewal Date.  
 Renewal Date Notify Days Before Renewal  
 Renewal Notification Date  
 Notify user when New Contract or Draft is within specified days of Approval Due Date.  
 Approval Due Date Notify Days Before Approval  
 Approval Notification Date

▼ Spend Threshold Notification  
 Notify user when the released amount exceeds the threshold.  
 Released Threshold Notification Amount 0.00 USD  
 Total Released Amount 0.00

▼ Notification Assignments

	Notification Type	User ID	User Description	Email Address		
1					+	-

OK Cancel



## Lesson 1: Enter Supplier Contract Details

### Lecture 3: Create and Maintain Spend Thresholds and Notifications

Use this page to set the Spend Threshold amount and the number of days, before the contract expiration, to notify a buyer or administrator.

The information that the user enter is used with INFORMS Workflow notifications when the contract is about to expire or run out of money. Notifications are a standard INFORMS workflow event that is triggered through the application engine program. In addition to updating a worklist, INFORMS can send email notifications, which are triggered by the same conditions as workflow notifications. The decision to create a worklist, send an email, or both depends on the user-profile and workflow-routing preferences.



## Lesson 1: Training Activity 2

**Demonstration** The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

**Instructions** Please refer to Activity 2 on the SCM 205 Training Activity and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

User will perform the activity by following the SCM 205 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available if user have questions.



## Lesson 1: Training Exercise

### Debrief

1. How does one Business Unit prevent another Business Unit from using their contracts?



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2. What should be set up when a Buyer wants to be informed that a certain amount on a Contract has been released on a Purchase Order?

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## Lesson 1: Lesson Summary

### Lesson Summary



Having completed the Contract Details lesson, users should be able to

- Enter Supplier Contract Header Details
- Copy Existing Contract Details
- Create and Maintain Spend Thresholds and Notifications



## Lesson 2: Enter Supplier Contract Lines

**Lesson 2:** At the conclusion of this lesson, user will be able to:

### Introduction

- Enter Supplier Contract Line Details
- Assign Contract Category Codes
- Create and Maintain Line Level Spend Thresholds and Notifications



## Lesson 2: Enter Supplier Contract Lines

### Lesson 2: Introduction

After creating the contract header, the user can begin creating contract lines for the contract by adding Item IDs or Descriptions to the contract. **Item IDs** represent the goods and services for procurement. These can be defined in advance, or they can be created on an ad-hoc basis specifically for the contract. If users are awarding an event that already has Item IDs on the Sourcing Event, then those items should be used on the Supplier Contract. Attributes assigned to the item appear by default in the contract lines, along with contract header-level data that pertains to the contract line, but these can be overridden at the line level.

The INFORMS Supplier Contract module allows users to leverage **Contract Categories** enabling the user to specify larger groups of items on a contract, rather than having to enter the items one at a time. When creating requisitions and purchase orders tied to a Supplier Contract, INFORMS locates and verifies that it automatically uses the appropriate contracts through the defined category code. These Contract Categories can be used in conjunction with existing contract line item IDs.

Within the Supplier Contract Lines, the user can set and/or override specific Spend Thresholds and Notifications for individual line items similar to how they can be defined at the Contract Header level.



## Lesson 2: Enter Supplier Contract Lines

### Key Terms

The following key terms are used in this Lesson:



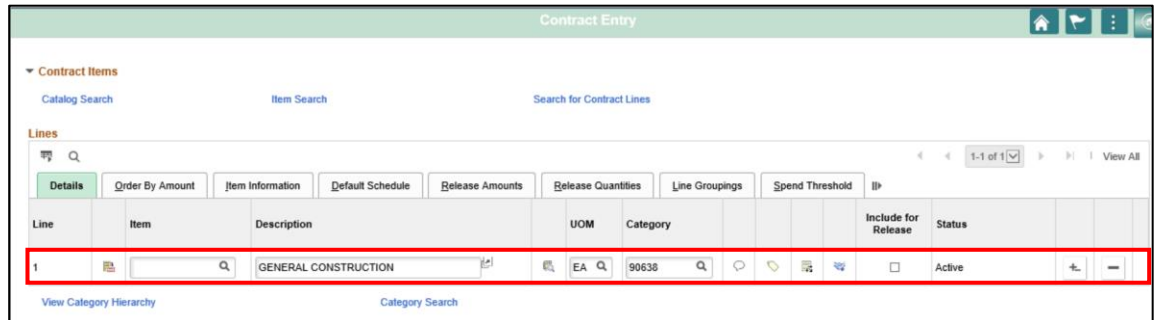
Term	Definition
<b>Contract Document</b>	A textual document the user can associate with a transactional purchasing contract, solicitation or a Purchase Order. Contract Documents are signed agreements that bind buyers and suppliers to specific terms and conditions.
<b>Supplier</b>	Organizations that are actively doing business or have done business in the past with the County, or otherwise receiving payments from the County. Supplier data is used in the following transactions: Sourcing Opportunities (RFPs, RFQs, etc.), contracts, requisition, purchase order entry, receiving/returning goods, voucher entry, payments for goods/services purchased.



## Lesson 2: Enter Supplier Contract Lines

### Lecture 1: Enter Supplier Contract Line Details

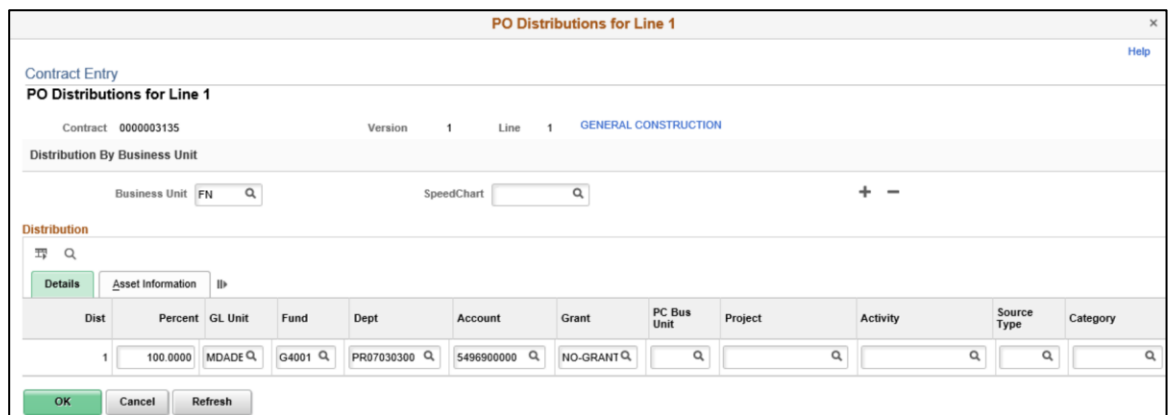
- Each item appears on the contract as a distinct **Contract Line number**. From this page, the user can view or access all details defined for a contract line.



The screenshot shows the 'Contract Entry' interface. At the top, there are tabs for 'Contract Items', 'Catalog Search', 'Item Search', and 'Search for Contract Lines'. Below these, there's a 'Lines' section with a search bar and a table. The table has columns: Line, Item, Description, UOM, Category, Include for Release, and Status. The first row is highlighted with a red border and contains the following data:

Line	Item	Description	UOM	Category	Include for Release	Status
1		GENERAL CONSTRUCTION	EA	90638	<input type="checkbox"/>	Active

- After entering items into the contract, the **Contract - Lines** tabs enable the user to view and enter all required distribution details for the contracted items.
- Each contract line item is associated with its own **Category** and can be associated to ChartFields (i.e. **Accounting Distributions**). When ChartFields will always be the same in all transactions, it is best to enter the ChartFields as part of the Contract so that these values will default on the Purchase Order.



The screenshot shows the 'PO Distributions for Line 1' interface. It displays contract information: Contract 0000003135, Version 1, Line 1, and Category GENERAL CONSTRUCTION. Below this, there's a 'Distribution By Business Unit' section with fields for Business Unit (FN) and SpeedChart. The main section is 'Distribution', which includes a table with columns: Dist, Percent, GL Unit, Fund, Dept, Account, Grant, PC Bus Unit, Project, Activity, Source Type, and Category. The first row is populated with the following data:

Dist	Percent	GL Unit	Fund	Dept	Account	Grant	PC Bus Unit	Project	Activity	Source Type	Category
1	100.0000	MDADE	G4001	PR07030300	\$496900000	NO-GRANT					

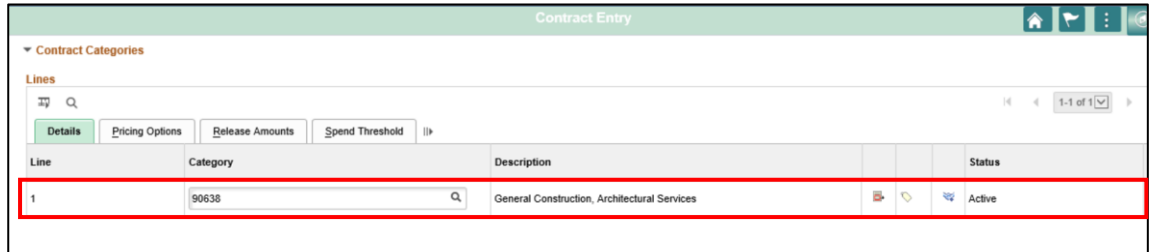
At the bottom, there are buttons for 'OK', 'Cancel', and 'Refresh'.



## Lesson 2: Enter Supplier Contract Lines

### Lecture 2: Assign Contract Category Codes

When the user links a **Category** or a group of categories to a contract, requisitions and purchase orders can reference the contract with any items within those categories. A category can encompass a larger number of items for procurement from a particular Supplier.



Line	Category	Description	Status
1	90638	General Construction, Architectural Services	Active

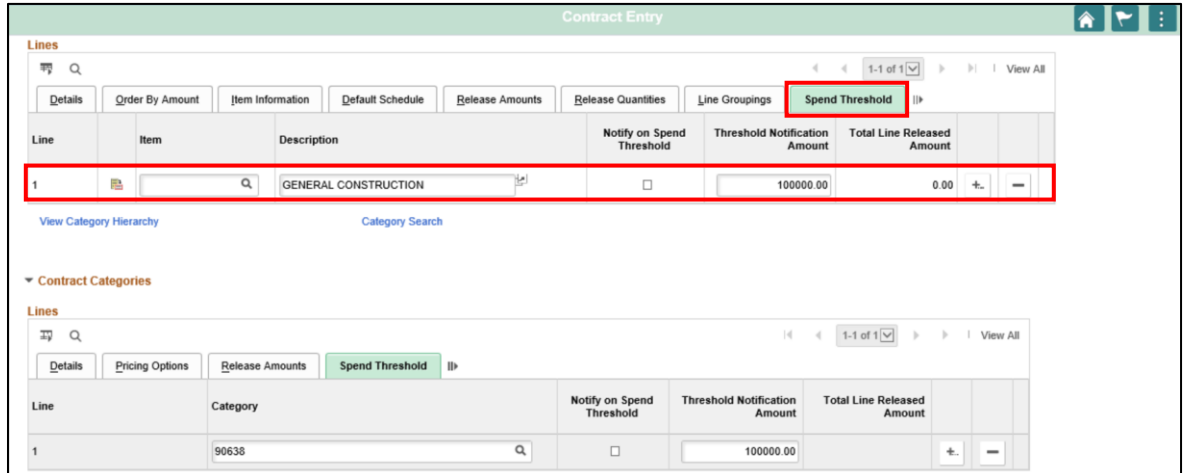
Use the **Lines grid** to define basic information for contract category line items. Category information helps reduce redundant data entry during both item setup and requisition and purchase order processing. Item categories can provide transaction information for requisitions and requests for quotes, contracts, and purchase orders and can serve as the organizational unit for item catalogs. With categories tied to contracts, requisitions and purchase orders can reference the contract with any items within those categories. Most contracts converted from ADPICS will use the Category line functionality. Going forward, though, it is best to use Item IDs on the Supplier Contract.



## Lesson 2: Enter Supplier Contract Lines

### Lecture 3: Create and Maintain Line Level Spend Thresholds and Notifications

Similar to how it's defined at the Contract Header level, users can define **Spend Thresholds** for individual items and category codes. The **Contract Line Entry Spend Threshold** tab will allow the user to define Spend Thresholds for purchasing contracts and each assigned category at the line level.



The screenshot displays the 'Contract Entry' interface with the 'Spend Threshold' tab selected. The interface is divided into two main sections: 'Lines' and 'Contract Categories'.

**Lines Section:**

- Navigation tabs: Details, Order By Amount, Item Information, Default Schedule, Release Amounts, Release Quantities, Line Groupings, **Spend Threshold** (highlighted with a red box).
- Table with columns: Line, Item, Description, Notify on Spend Threshold, Threshold Notification Amount, Total Line Released Amount.
- Row 1: Line 1, Item (searchable), Description: GENERAL CONSTRUCTION, Notify on Spend Threshold: ☐, Threshold Notification Amount: 100000.00, Total Line Released Amount: 0.00.
- Links: View Category Hierarchy, Category Search.

**Contract Categories Section:**

- Navigation tabs: Details, Pricing Options, Release Amounts, **Spend Threshold** (highlighted with a green box).
- Table with columns: Line, Category, Notify on Spend Threshold, Threshold Notification Amount, Total Line Released Amount.
- Row 1: Line 1, Category: 90638, Notify on Spend Threshold: ☐, Threshold Notification Amount: 100000.00, Total Line Released Amount: (empty).

This section defines Spend Threshold amounts for the line or category and whether users should be notified when the Spend Threshold is reached.



## Lesson 2: Training Activity 3

**Demonstration** The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

**Instructions** Please refer to Activity 3 on the SCM 205 Training Activity and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. The Instructor will explain how to log into INFORMS.

User will perform the activity by following the SCM 205 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available if the user have questions.



## Lesson 2: Training Exercise

### Debrief

1. Are users encouraged to use Contract Lines (i.e. Items ID) or Category Lines more on a Supplier Contract?



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2. Why is it advantageous to enter ChartFields (Accounting Information) on a Supplier Contract?

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## Lesson 2: Lesson Summary

### Lesson Summary



Having completed the Relate Contract to Allocation lesson, users should be able to

- Enter Supplier Contract Line Details
- Assign Contract Category Codes
- Create and Maintain Line Level Spend Thresholds and Notifications



### **Lesson 3: Relate Contract to Group Multi Supplier Contract-Customization**

**Lesson 3:** At the conclusion of this lesson, user will be able to:

- Introduction**
- Associate Supplier Contracts to Group Multi Supplier Contracts



### Lesson 3: Relate Contract to Group Multi Supplier Contract-Customization

**Lesson 3:** INFORMS' Supplier Contracts module will continue to support the UAP/IG business process requirements by establishing a parent-child relationship between Group Multi Supplier Contracts and Supplier Contracts.

**Introduction**

As stated previously, the **GRI** (Grant Restriction Indicator) is set at the parent contract level on the Group Multi Supplier Contract for both pool and fixed price contracts. Contracts flagged with all GRI values except *M* (Mixed Funding) will inherit the flag value from the master contract. Each child Supplier Contract and subsequent PO issued to the suppliers will inherit the GRI flag value from the master contract for all contracts except those marked with *M* (Mixed Funding) as GRI value. Department Users will not have access to change the GRI value, set at the master contract level or the Child contract level for all GRI except those marked with *M* (Mixed Funding) GRI value.

Contracts flagged with GRI value of *M* (Mixed Funding) at the master contract level allows for child Supplier Contracts to be created with any of the available GRI values if the user has the proper security permissions. Subsequent Purchase Orders will inherit the GRI of the Supplier Contract they are issued against - the PO Buyer will not be able to change this value.



### Lesson 3: Relate Contract to Group Multi Supplier Contract-Customization

#### Key Terms

The following key terms are used in this Lesson:



Term	Definition
<b>Agreements</b>	Agreements, also called deliverables, provide a mechanism to define and manage internal and external agreements for the contract.
<b>Contract Document</b>	A textual document the user can associate with a transactional Supplier contract, solicitation or a Purchase Order. Contract Documents are signed agreements that bind buyers and suppliers to specific terms and conditions.
<b>Supplier</b>	Organizations that are actively doing business or have done business in the past with the County, or otherwise receiving payments from the County. Supplier data is used in the following transactions: Sourcing Opportunities (RFPs, RFQs, etc.), contracts, requisition, purchase order entry, receiving/returning goods, voucher entry, payments for goods/services purchased.



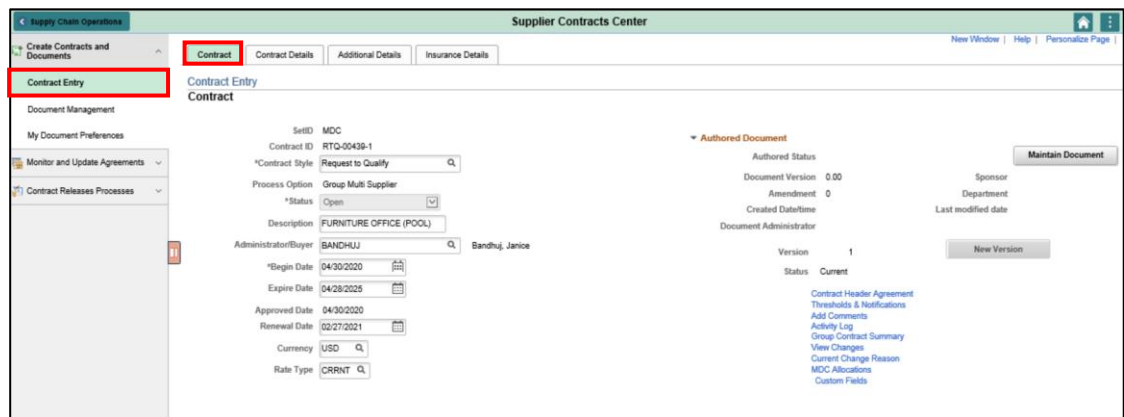
### Lesson 3: Relate Contract to Group Multi Supplier Contract-Customization

#### Lecture 1: Associate Supplier Contracts to Group Multi Supplier Contracts

A child Supplier Contract can be related to a Group Multi Supplier Contract in one of two ways, either at the parent contract level or the child contract level.

To relate a contract at the parent level:

1. Navigate to the **Supplier Contracts Center: Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contracts Center**
2. Select the **Contract Entry** from the **Create Contracts and Documents** menu.
3. Select for either an existing **Group Multi Supplier contract (parent)** or **Supplier Contract (child)** by selecting the appropriate Contract Process Option.
4. By selecting a **Group Multi Supplier** the select results will display any of the parent contracts the user wishes to establish a Child Supplier Contract for.



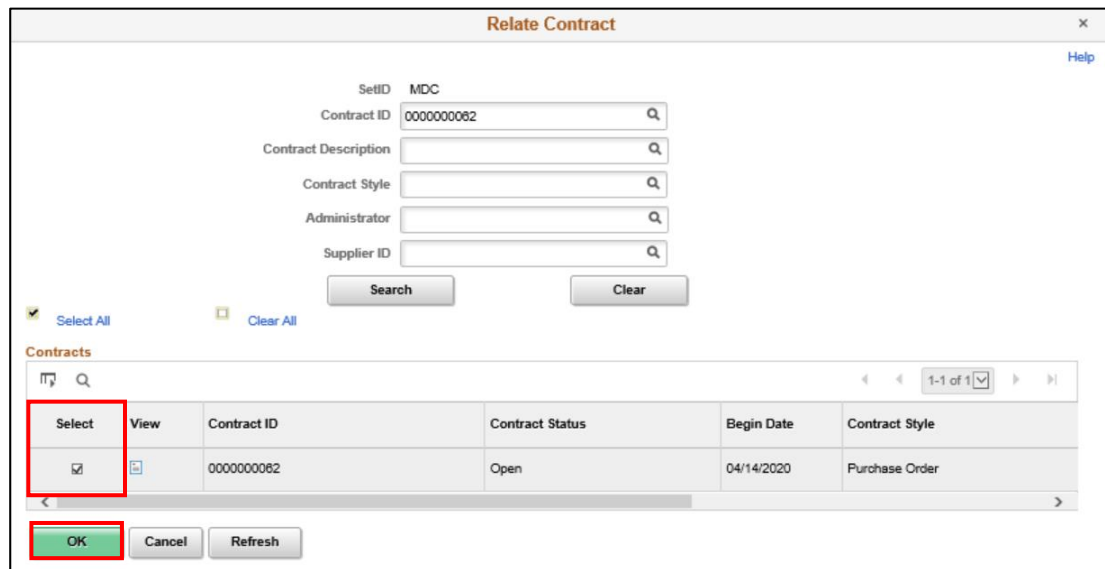
The screenshot displays the 'Supplier Contracts Center' interface. On the left, the 'Contract Entry' option is highlighted under the 'Create Contracts and Documents' menu. The main content area shows the 'Contract Entry' form for a 'Request to Qualify' contract. Key fields include Contract ID (RTQ-00439-1), Process Option (Group Multi Supplier), Status (Open), Description (FURNITURE OFFICE (POOL)), Administrator/Buyer (BANDHUJ), Begin Date (04/30/2020), Expire Date (04/28/2025), Approved Date (04/30/2020), Renewal Date (02/27/2021), Currency (USD), and Rate Type (CRRNT). The right sidebar shows document information, including 'Authorized Document' status, version (1), and a list of links for document management such as 'Contract Header Agreement', 'Thresholds & Notifications', 'Add Comments', 'Activity Log', 'Group Contract Summary', 'View Changes', 'Current Change Reason', 'MDC Allocations', and 'Custom Fields'.

5. Then, scroll down to the Related Contracts section of the page and Select the **Add Related Contracts** link.
6. A pop-up window will display for the user to select a Child Supplier Contract to link to the parent Group Multi Supplier Contract.



### Lesson 3: Relate Contract to Group Multi Supplier Contract-Customization

#### Lecture 1: Associate Supplier Contracts to Group Multi Supplier Contracts



SetID MDC

Contract ID 0000000062

Contract Description

Contract Style

Administrator

Supplier ID

Search Clear

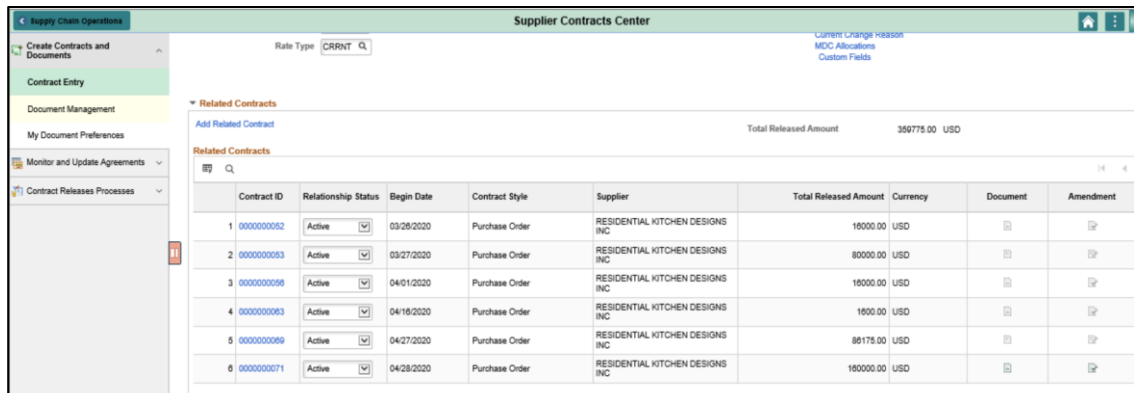
☒ Select All ☐ Clear All

**Contracts**

Select	View	Contract ID	Contract Status	Begin Date	Contract Style
<input checked="" type="checkbox"/>		0000000062	Open	04/14/2020	Purchase Order

OK Cancel Refresh

- Upon checking the **Select** checkbox and Searching the **OK** button, the identified Supplier Contract will be displayed as a related contract for the Group Multi Supplier Contract.
- This will populate the Supplier Contract with the **UAP/IG** and **GRI values** from the Group Multi Supplier Contract.



Supplier Contracts Center

Rate Type CRRNT

Current Change Reason: MDC Allocations, Custom Fields

Total Released Amount: 359775.00 USD

Contract ID	Relationship Status	Begin Date	Contract Style	Supplier	Total Released Amount	Currency	Document	Amendment
1 0000000052	Active	03/26/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	16000.00	USD		
2 0000000053	Active	03/27/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	80000.00	USD		
3 0000000058	Active	04/01/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	16000.00	USD		
4 0000000063	Active	04/18/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	1600.00	USD		
5 0000000069	Active	04/27/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	85175.00	USD		
6 0000000071	Active	04/28/2020	Purchase Order	RESIDENTIAL KITCHEN DESIGNS INC	160000.00	USD		

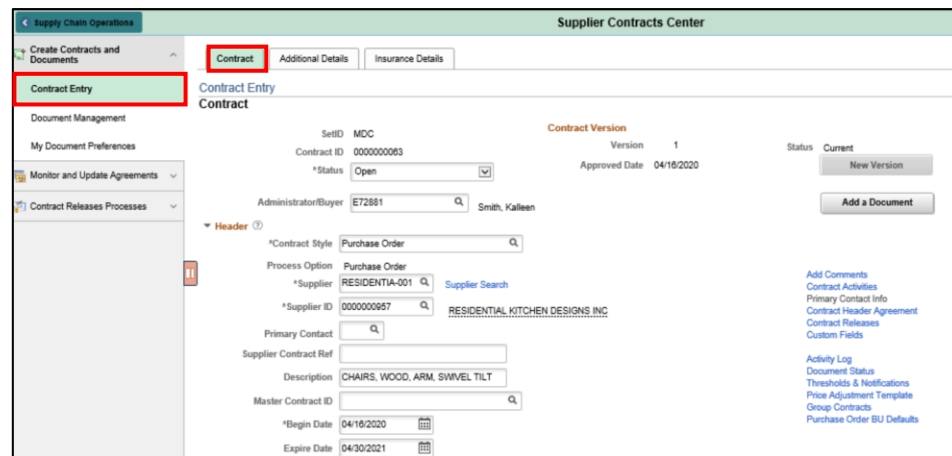


### Lesson 3: Relate Contract to Group Multi Supplier Contract-Customization

#### Lecture 1: Associate Supplier Contracts to Group Multi Supplier Contracts

To relate a contract at the child level:

1. Navigate to the **Supplier Contracts Center: Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contracts Center**
2. Select the **Contract Entry** from the Create Contracts and Documents menu.
3. Select for an existing open contract with Purchase Order as the Contract Process Option.
4. This will display the child level Supplier Contract the user wish to relate to a parent Group Multi Supplier Contract.



5. Then, select the **Additional Details** tab, displaying the **UAP/IG** and **GRI** fields for the Supplier Contract. To populate these fields, the user would enter or Select from the existing Group Multi Supplier Contact, the user wishes to relate.

GRI Value	GRI Value Description
F	Federal Funding Clauses
A	General Contracts
M	Mixed Funding
N	No Grant Compliance/No Grant Funding Allowed w/ UAP
S	State Funding Clauses
T	Federal Transit Administration Funding Clauses
U	No Grant Compliance/No Grant Funding Allowed - w/o IG
X	No Grant Compliance/No Grant Funding Allowed - w/o UAP

6. Select **Save**.

The Supplier Contract is saved and approved through the **Supplier Contract Approval Workflow**, and all subsequent PO's sourced from the Supplier Contract will carry forward the UAP/IG and GRI values established on the parent Group Multi Supplier.



### Lesson 3: Training Activity 4

**Demonstration** The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

**Instructions** Please refer to Activity 4 on the SCM 205 Training Activity and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructor will explain how to log into INFORMS.

User will perform the activity by following the SCM 205 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available if the user has questions.



### Lesson 3: Training Exercise

#### Debrief

1. True or False? The GRI value set on the Supplier Contract will dictate whether IG and/or UAP will be withheld on a payment.



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2. True or False? All GRI Values on a Child Contract is inherited from the Group Multi Supplier Contract.

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### Lesson 3: Lesson Summary

#### Lesson Summary



Having completed the Relate Contract to Group Multi Supplier Contract-Customization lesson, users should be able to:

- Associate Supplier Contracts to Group Multi Supplier Contracts



## Module 4: Document Management

### Lessons

This module includes the following lessons:

- Create Purchasing Contract, Sourcing Contract and Ad-Hoc Documents
- Collaborate on Documents
- Negotiate Supplier Contract Document
- Execute Supplier Contract Document
- Approve Supplier Contract Document
- Amend Supplier Contract Document



## **Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document**

**Lesson 1:** At the conclusion of this lesson, users will be able to:

### **Introduction**

- Create an Ad-hoc Contract Document
- Create a Sourcing Event Document
- Create a Purchasing Contract Document



## **Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document**

### **Lesson 1: Introduction**

The Supplier Contract Document Management application works in conjunction with the transactional contract and Purchasing functionality in the Supplier Contract and Purchasing modules, and Events, in the Strategic Sourcing module. This integration is accomplished by linking Microsoft Word-based authored documents to source transactional elements.

The source transactions available for creating documents are ad-hoc documents, contract documents, Sourcing Event documents, and purchasing documents. The document configurator creates a draft of the document. The draft is reviewed and updated as necessary. The document may be collaborated on, both internally and externally. After all collaborators have provided input, the updated document is returned to the document author to accept and finalize collaboration. Once finalized the document is routed for approval through configured approval workflow. If signatures are required, signatures can be collected via DocuSign.

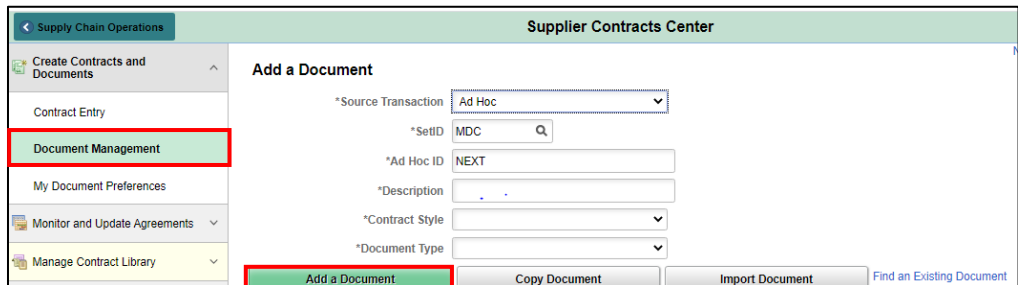


## Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document

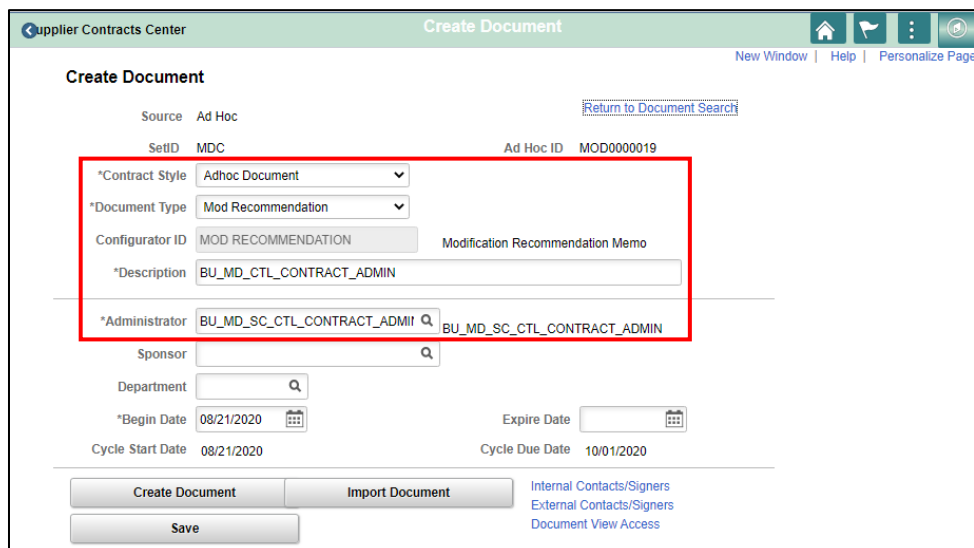
### Lecture 1: Steps to Create an Ad-hoc Document

#### Ad-hoc Contract

1. Navigate to the **Document Management** page: **Finance/Supply Chain > Supply Chain Operations > Supplier Contracts Center > Document Management**.



2. Select **Ad-hoc** in the **Source Transaction** list.
3. Select **Ad-hoc Document** in the **Contract Style** list.
4. Chose the **Document Type Mod Recommendation**.
5. Accept the default **Ad-hoc Id NEXT**.
6. Select the **Description** field. Enter user's login ID as the MOD Recommendation description.



7. Fill out the **Sponsor** field.
  - Sponsors are individuals who represent the department that is sponsoring the contract.
8. Enter the **Department**.

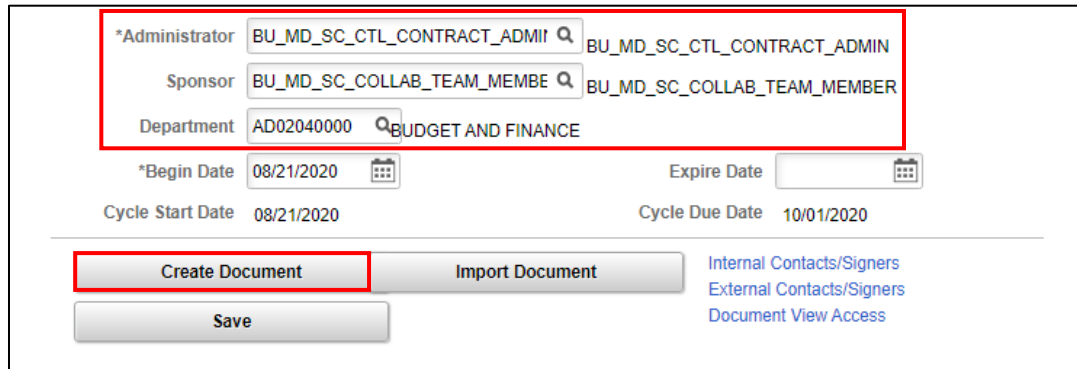


## Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document

### Lecture 1:

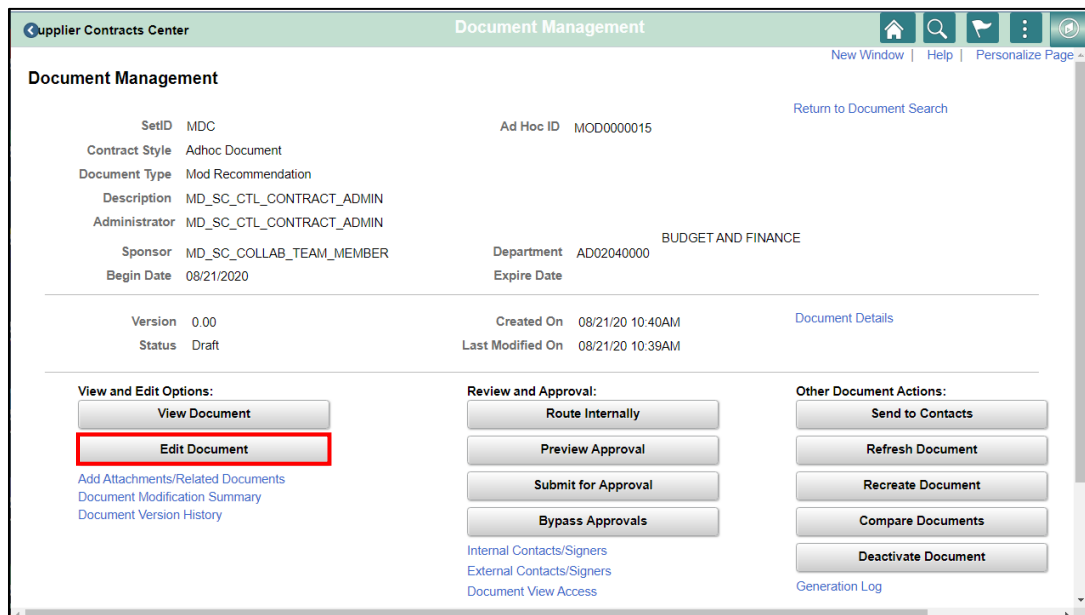
### Ad-hoc Contract

9. Select the **Create Document** button.



\*Administrator BU\_MD\_SC\_CTL\_CONTRACT\_ADMIN BU\_MD\_SC\_CTL\_CONTRACT\_ADMIN  
Sponsor BU\_MD\_SC\_COLLAB\_TEAM\_MEMBER BU\_MD\_SC\_COLLAB\_TEAM\_MEMBER  
Department AD02040000 BUDGET AND FINANCE  
\*Begin Date 08/21/2020  
Cycle Start Date 08/21/2020  
Cycle Due Date 10/01/2020  
Internal Contacts/Signers  
External Contacts/Signers  
Document View Access  
**Create Document** Import Document Save

10. Select the **Edit Document** button.



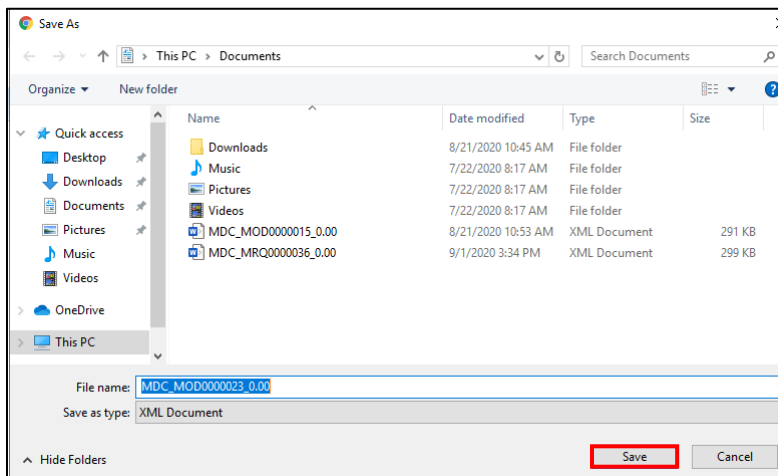
Supplier Contracts Center Document Management  
New Window | Help | Personalize Page  
Document Management  
SetID MDC Ad Hoc ID MOD0000015  
Contract Style Adhoc Document  
Document Type Mod Recommendation  
Description MD\_SC\_CTL\_CONTRACT\_ADMIN  
Administrator MD\_SC\_CTL\_CONTRACT\_ADMIN  
Sponsor MD\_SC\_COLLAB\_TEAM\_MEMBER Department AD02040000 BUDGET AND FINANCE  
Begin Date 08/21/2020  
Version 0.00 Created On 08/21/20 10:40AM  
Status Draft Last Modified On 08/21/20 10:39AM  
Return to Document Search  
Document Details  
View and Edit Options: Review and Approval: Other Document Actions:  
View Document Route Internally Send to Contacts  
Edit Document Preview Approval Refresh Document  
Add Attachments/Related Documents Submit for Approval Recreate Document  
Document Modification Summary Bypass Approvals Compare Documents  
Document Version History Internal Contacts/Signers Deactivate Document  
External Contacts/Signers  
Document View Access Generation Log



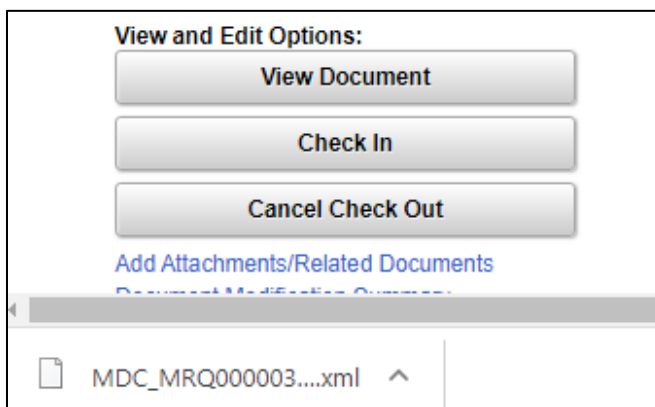
## Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document

### Lecture 1: Ad-hoc Contract

11. A new window displays with a pop-up **File Download** window. Select the file and the Save button.



12. INFORMS automatically copies the Template Memo into an XML document. When this is opened, a Word document will be created from the template.
- Note: Depending on the user's browser, a button at the bottom of the page or a popup window may appear.



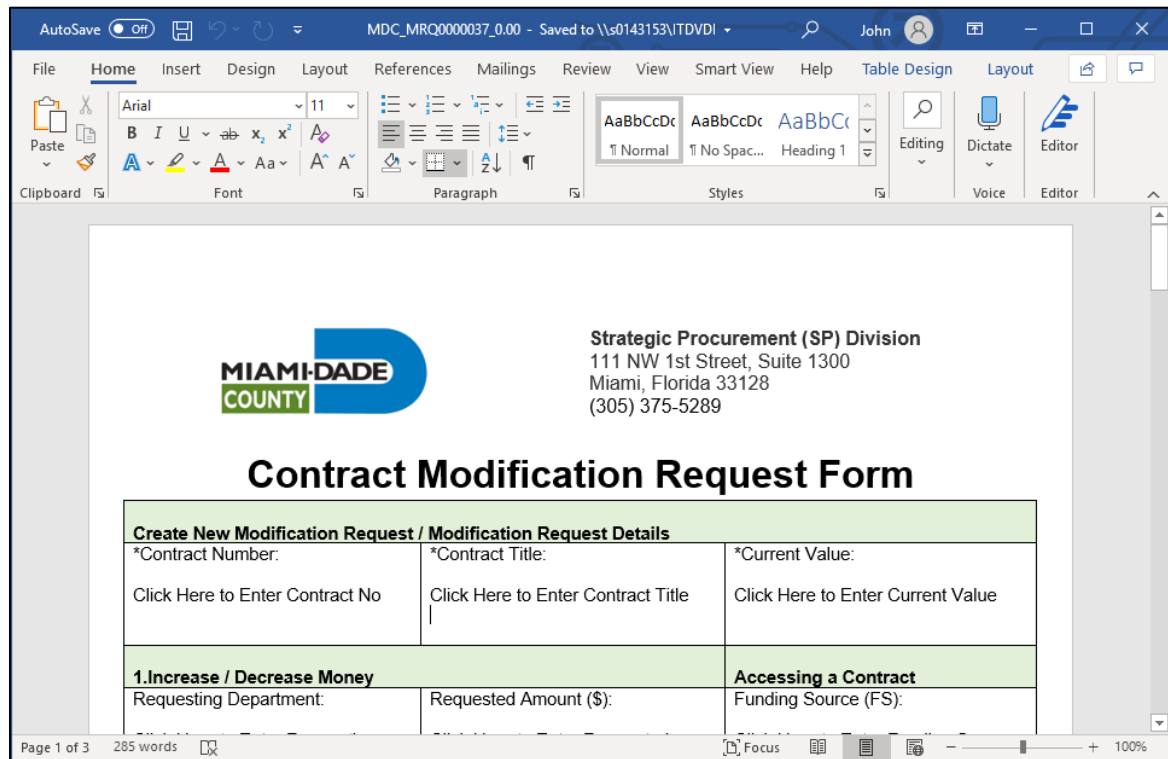


## Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document

### Lecture 1:

### Ad-hoc Contract

13. Edit and make required updates to the template.



The screenshot shows a Microsoft Word document titled "MDC\_MRQ0000037\_0.00 - Saved to \\s0143153\ITD\VDI". The document is a template for a "Contract Modification Request Form". The form includes the Miami-Dade County logo and contact information for the Strategic Procurement (SP) Division. The form is divided into sections for creating a new modification request and accessing an existing contract.

**MIAMI-DADE COUNTY**

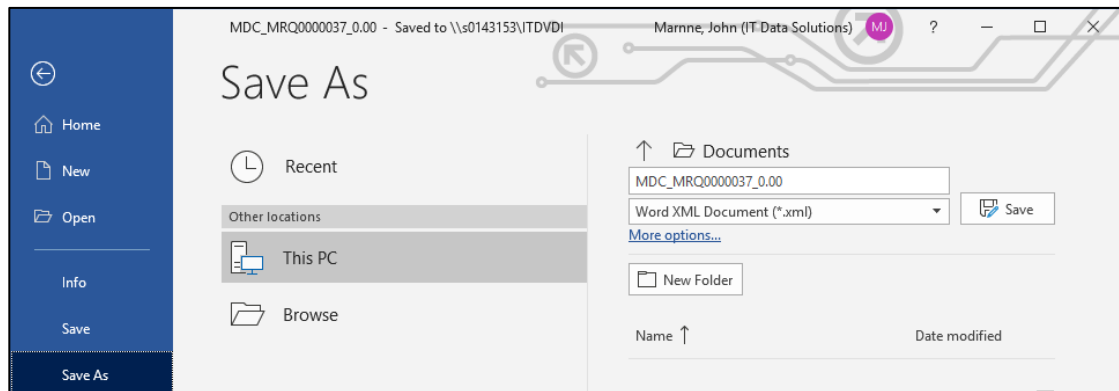
**Strategic Procurement (SP) Division**  
111 NW 1st Street, Suite 1300  
Miami, Florida 33128  
(305) 375-5289

### Contract Modification Request Form

Create New Modification Request / Modification Request Details		
*Contract Number: Click Here to Enter Contract No	*Contract Title: Click Here to Enter Contract Title	*Current Value: Click Here to Enter Current Value
1. Increase / Decrease Money		Accessing a Contract
Requesting Department:	Requested Amount (\$):	Funding Source (FS):

Page 1 of 3   285 words

14. Save the document to local computer.



The screenshot shows the Windows "Save As" dialog box. The file name is "MDC\_MRQ0000037\_0.00" and the file type is "Word XML Document (\*.xml)". The dialog box shows the "Recent" and "Other locations" tabs, with "This PC" selected. The "Documents" folder is highlighted in the "Other locations" section. The "Save" button is visible.

Save As

Recent

Other locations

This PC

Browse

Documents

MDC\_MRQ0000037\_0.00

Word XML Document (\*.xml)

Save

More options...

New Folder

Name ↑

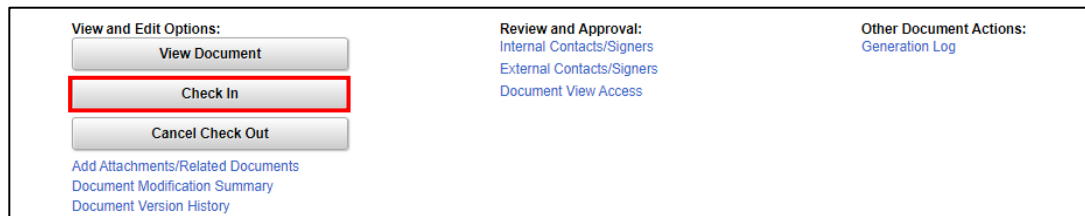
Date modified

15. Close the MS Word file.



**Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document****Lecture 1:****Ad-hoc  
Contract**

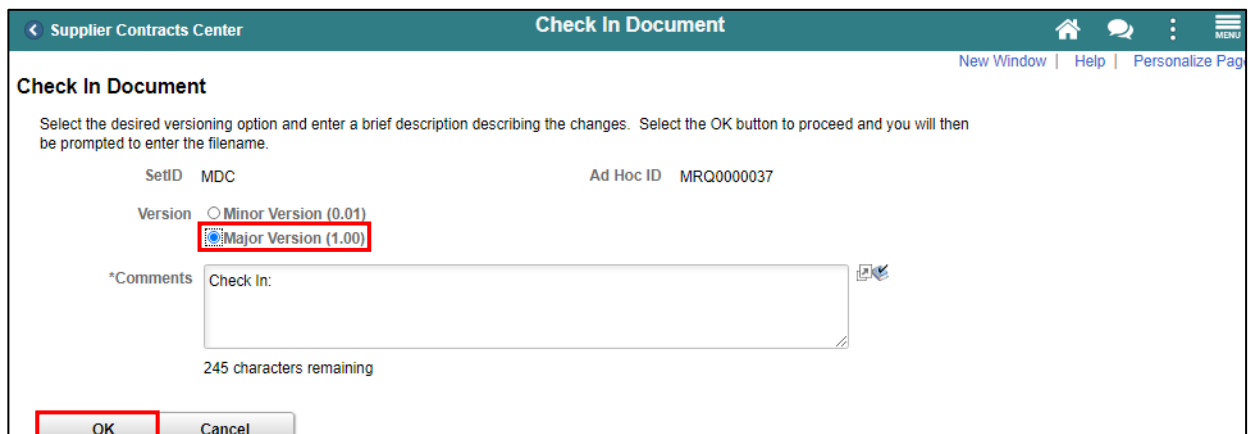
16. The Document Management window is displayed. Select the **Check In** button.



The Document Management window is displayed. It contains three main sections: 'View and Edit Options' with buttons for 'View Document', 'Check In' (highlighted with a red box), and 'Cancel Check Out'; 'Review and Approval' with links for 'Internal Contacts/Signers', 'External Contacts/Signers', and 'Document View Access'; and 'Other Document Actions' with a link for 'Generation Log'. At the bottom, there are links for 'Add Attachments/Related Documents', 'Document Modification Summary', and 'Document Version History'.

17. Select the **Major Version (1.00)** option.

18. Select the **OK** button.



The 'Check In Document' window is displayed. It has a title bar 'Supplier Contracts Center' and a subtitle 'Check In Document'. The main content area contains instructions: 'Select the desired versioning option and enter a brief description describing the changes. Select the OK button to proceed and you will then be prompted to enter the filename.' Below this, there are fields for 'SetID' (MDC) and 'Ad Hoc ID' (MRQ0000037). The 'Version' section has two radio buttons: 'Minor Version (0.01)' and 'Major Version (1.00)' (highlighted with a red box). A text area for '\*Comments' contains the text 'Check In:' and has a character count of '245 characters remaining'. At the bottom, there are 'OK' (highlighted with a red box) and 'Cancel' buttons.

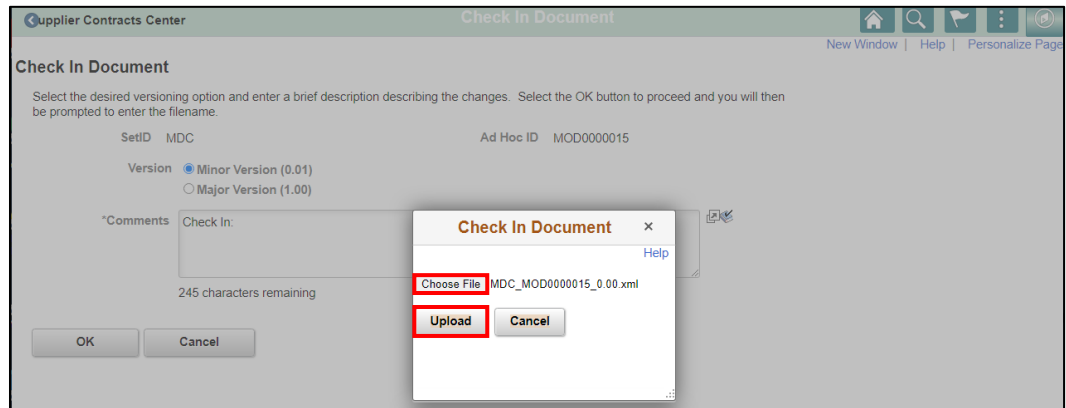


## Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document

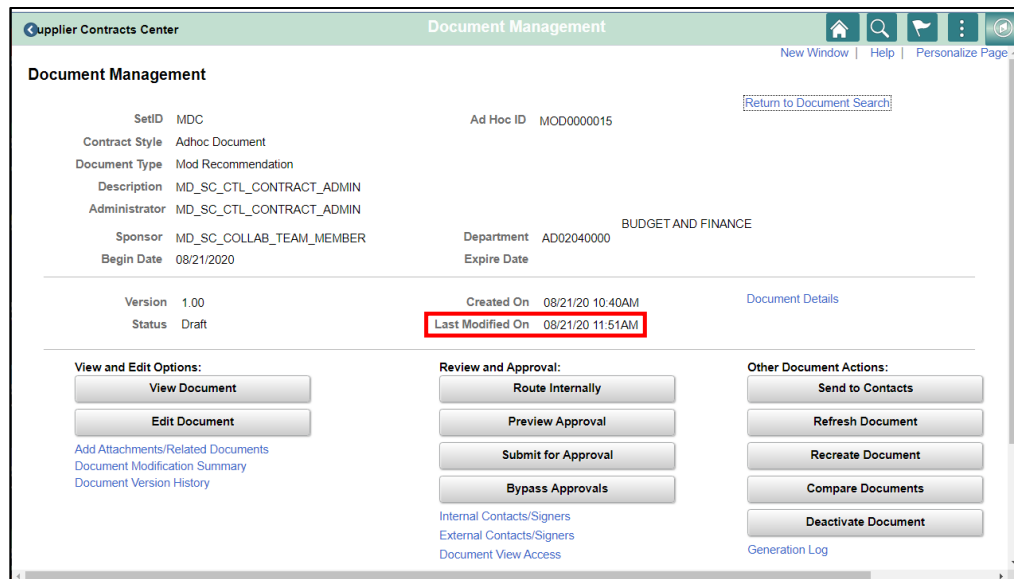
**Lecture 1:** 19. Select the **Choose File** button.

**Ad-hoc** 20. Select the file that was saved.

**Contract** 21. Select the **Upload** button.



22. Confirm the **Last Modified On** field is updated with the date and time.



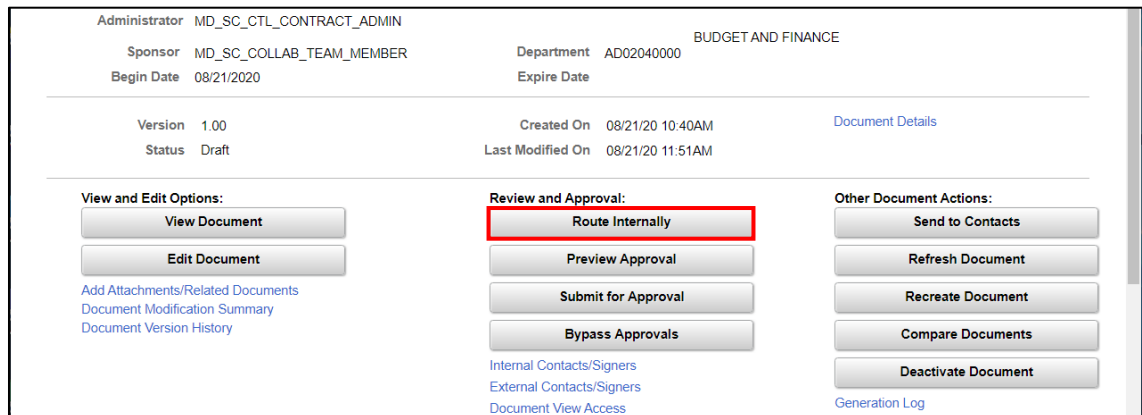


## Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document

### Lecture 1:

### Ad-hoc Contract

23. Select the **Route Internally** button.



Administrator MD\_SC\_CTL\_CONTRACT\_ADMIN  
Sponsor MD\_SC\_COLLAB\_TEAM\_MEMBER  
Begin Date 08/21/2020  
Department AD02040000 BUDGET AND FINANCE  
Expire Date

Version 1.00  
Status Draft  
Created On 08/21/20 10:40AM  
Last Modified On 08/21/20 11:51AM  
[Document Details](#)

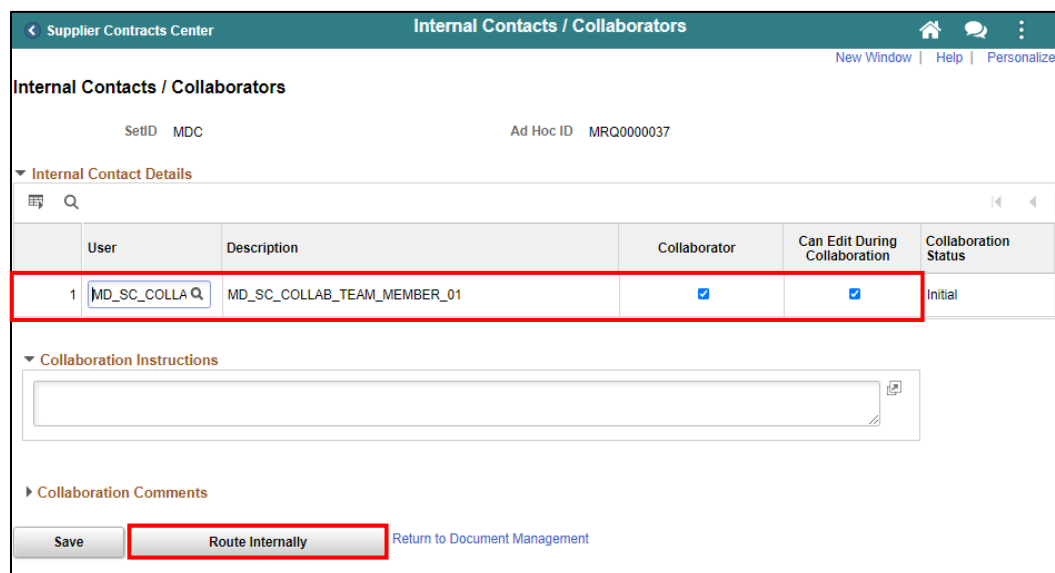
**View and Edit Options:**  
View Document  
Edit Document  
[Add Attachments/Related Documents](#)  
[Document Modification Summary](#)  
[Document Version History](#)

**Review and Approval:**  
**Route Internally**  
Preview Approval  
Submit for Approval  
Bypass Approvals  
[Internal Contacts/Signers](#)  
[External Contacts/Signers](#)  
[Document View Access](#)

**Other Document Actions:**  
Send to Contacts  
Refresh Document  
Recreate Document  
Compare Documents  
Deactivate Document  
[Generation Log](#)

24. Verify the **Sponsor** is entered.

25. Check the **Collaborator** and **Can Edit During Collaboration** checkboxes and select the **Route Internally** button.



Supplier Contracts Center Internal Contacts / Collaborators

SetID MDC Ad Hoc ID MRQ0000037

Internal Contact Details

	User	Description	Collaborator	Can Edit During Collaboration	Collaboration Status
1	MD_SC_COLLAB	MD_SC_COLLAB_TEAM_MEMBER_01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Initial

Collaboration Instructions

Collaboration Comments

Save **Route Internally** [Return to Document Management](#)

26. Make a note of the **Ad-hoc ID**. This number will be needed later in the process.



Supplier Contracts Center Document Management

SetID MDC Ad Hoc ID MRQ0000037  
[Return to Document Search](#)

Contract Style Adhoc Document  
Document Type Modification Request  
Description Contract\_Admin  
Administrator BU\_MD\_SC\_CTL\_CONTRACT\_ADMIN  
Sponsor MD\_SC\_COLLAB\_TEAM\_MEMBER\_01  
Begin Date 09/21/2020  
Department ID04000000 BUDGET AND FINANCE ADMIN  
Expire Date



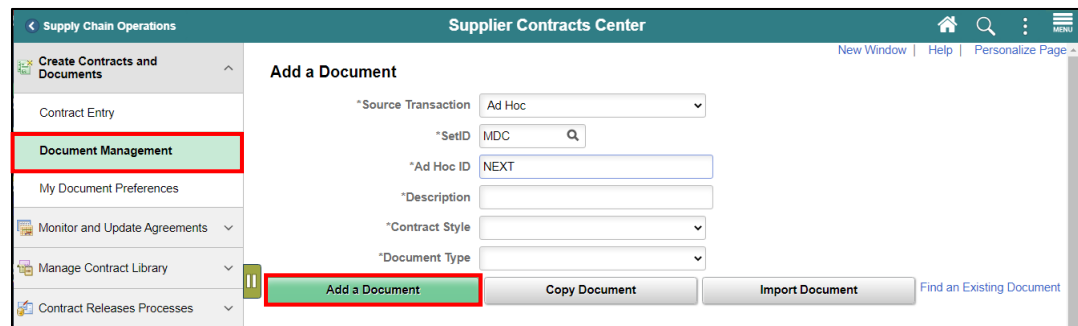
## Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document

### Lecture 2: Steps in Creating a Sourcing Event

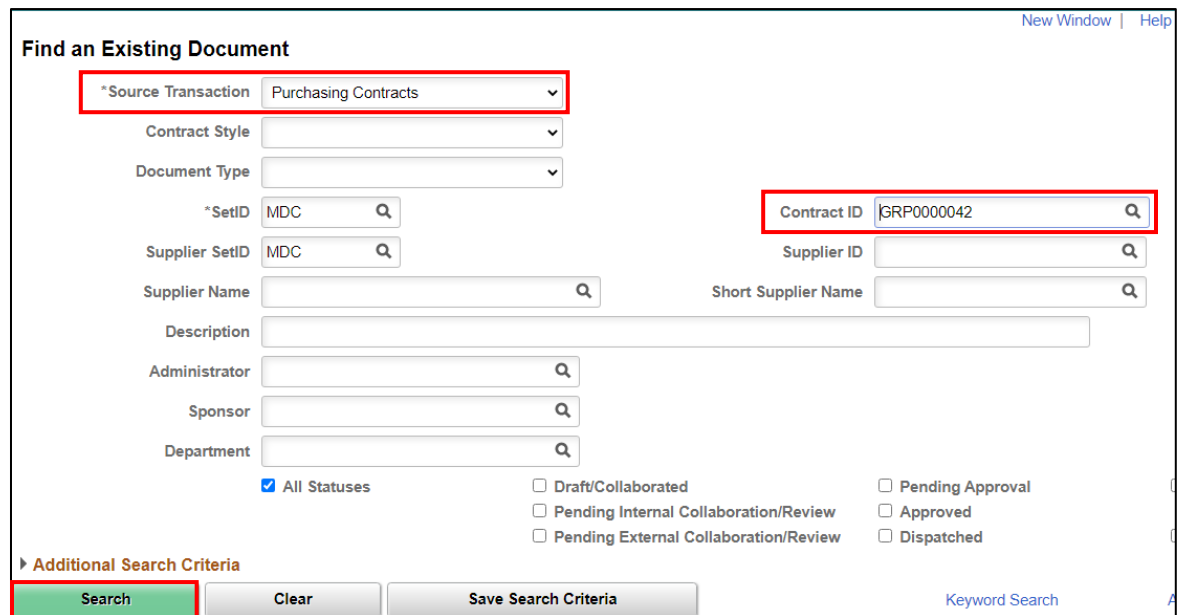
#### Create a Sourcing Event Document

Navigate to the **Document Management** page: **Finance / Supply Chain (FSCM) tile > Supply Chain Operations tile > Supplier Contracts Center > Create Contracts and Documents > Document Management**

1. Enter the Source Transaction as Sourcing Event, Business Unit, Event ID, Contract Style, and Document Type. Then select the **Find an Existing Document**.



2. Select the Source Transaction **Purchasing Contracts** and enter a **Contract ID**. Select the **Search** button.





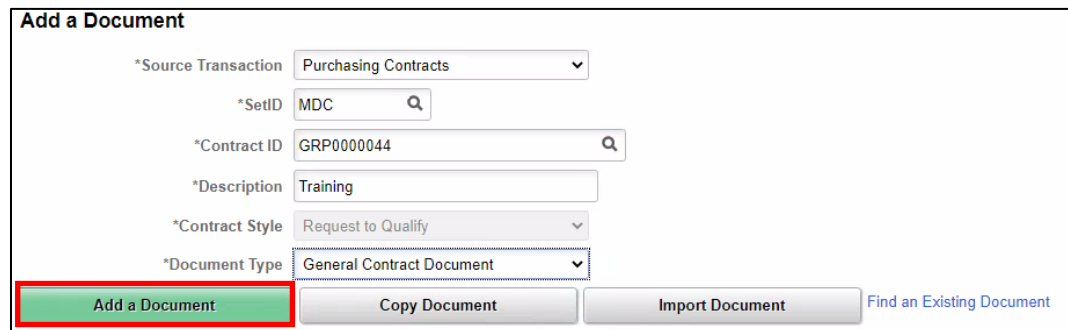
## Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document

### Lecture 3: Steps in Creating a Purchasing Contract

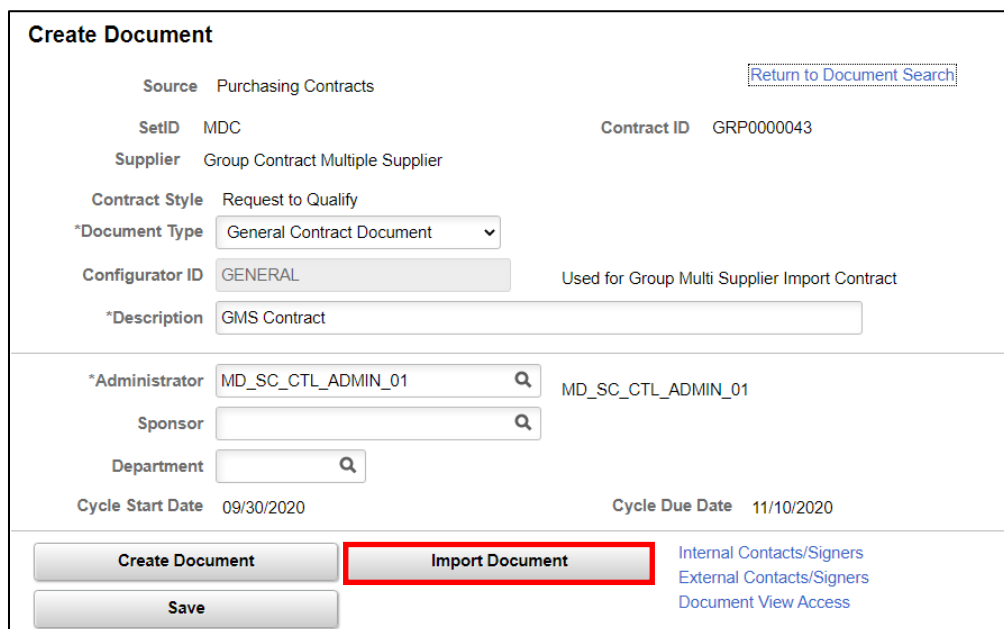
#### Create a Purchasing Contract

Navigate to the **Document Management** page: **Main Menu > Supplier Contracts > Create Contracts and Documents > Document Management**

1. Enter the Source Transaction as Purchasing Contract, Set ID, Contract ID, Contract Style, and Document Type. Then select **Add Document**.



2. The Create Document page is displayed. Select **Import Document**.





## Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document

### Lecture 3: Create a Purchasing Contract

3. Set up sample contract document for the Purchasing Contract to proceed. Then select **Done with Import**.

**Import Option**

- ☒ Current Contract/Document  
(Current Contract/Document with no formal amendments or history to load.)
- ☐ Amended Contract  
(Single current contract as fully amended requiring an amendment number. History is optional.)
- ☐ Amended Contract and Amendment  
(Current contract as fully amended and a current separate amendment summary file. History is optional.)
- ☐ Original and Amendment  
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

**Current Version**

Basic Info Details

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document	UPK_Test.docx	1.00	Draft	05/01/2022	10:00AM	Upload	Clear

Prior Version is not applicable

**Done with Import** Cancel

4. The **Document Management** page displays where the Purchasing Contract is ready to be submitted for approval.

**Document Management**

SetID MDC Contract ID GRP0000042 [Return to Document Search](#)

Supplier Group Contract Multiple Supplier

Contract Style Request to Qualify

Document Type Form of Agreement

Description UAT Test Don

Administrator MD\_SC\_CTL\_ADMIN\_01

Sponsor Khan, Adil Department

Version 0.00 Created On 09/27/20 8:06PM [Document Details](#)

Status Draft Last Modified On 09/27/20 8:07PM

**View and Edit Options:**

[View Document](#)

[Edit Document](#)

[Add Attachments/Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

**Review and Approval:**

[Route Internally](#)

[Route Externally](#)

[Preview Approval](#)

**Submit for Approval**

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

**Other Document Actions:**

[Send to Contacts](#)

[Refresh Document](#)

[Recreate Document](#)

[Compare Documents](#)

[Deactivate Document](#)

[Generation Log](#)



## Lesson 1: Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document

### Key Terms

The following key terms are used in this Lesson:



Term	Definition
<b>Collaboration</b>	An optional function used when creating contract documents to share and track edits to documents across internal and external collaborators.
<b>Supplier</b>	Organizations that are actively doing business or have done business in the past with the County, or otherwise receiving payments from the County. Supplier data is used in the following transactions: Sourcing Opportunities (RFPs, RFQs, etc.), contracts, requisition, purchase order entry, receiving/returning goods, voucher entry, payments for goods/services purchased.
<b>Transactional Purchasing Contract</b>	System-entered contract data against which the user can reference and enforce contractual agreements, such as contracted items, quantities, and prices on procurement transactions. This type of contract is created and maintained within the Purchasing or Supplier Contract Management modules.



## Lesson 1: Training Activity 1

**Demonstration** The Instructor will now demonstrate how to execute the business process through the User Productivity Kit (UPK).

**Instructions** Please refer to Activity 6 on the SCM 205 Training Activity Guide and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 205 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available if users have questions.



## Lesson 1: Training Exercise

### Debrief



1. Digital signatures for Supplier Contracts in INFORMS can be obtained through which of the following services:

- a. Adobe Sign
- b. Beta eSig
- c. Capterra
- d. Docusign

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2. True or False? Collaboration on Supplier Contracts can be done both internally and externally.

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## Lesson 1: Lesson Summary

### Lesson Summary



Now that the users have completed the Create Purchasing Contract, Sourcing Contract and Ad-Hoc Document lesson, users should be able to:

- Create an Ad-hoc Document
- Create a Sourcing Contract
- Create a Purchasing Contract



## Lesson 2: Collaborate on Documents

**Lesson 2:** At the conclusion of this lesson, participants will be able to:

**Introduction**

- Collaborate on Supplier Contract Documents



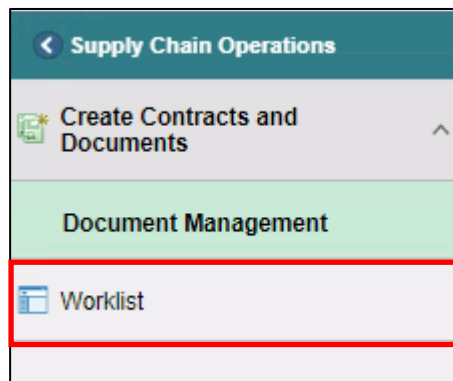
## Lesson 2: Collaborate on Documents

### Lecture 1: Collaborate on Documents

The **Collaboration** function is used when creating contract documents to share and track edits to documents across internal and external collaborators.

Collaboration is initiated when the **Route Internally** process is initiated as discussed in the previous lesson. The selected collaborators can access the document using the Worklist.

1. Navigate to the **Worklist** page: **Financials / Supply Chain (FSCM) tile > Supply Chain Operations tile > Supplier Contracts Center > Worklist**



2. Select the appropriate work item.

Worklist						
Worklist for MD_SC_COLLAB_TEAM_MEMBER_01: MD_SC_COLLAB_TEAM_						
Detail View						
Worklist Filters						
Feed						
Worklist Items						
From	Date From	Work Item	Worked By Activity	Priority	Link	
MD_SC_CTL_ADMIN_01	09/10/2020	Collaboration Review	Document Maintenance		Set ID: "MDC" Ad Hoc ID: "MCD0000025".69	Mark Worked
BU_MD_SC_CTL_CONTRACT_ADMIN	09/21/2020	Collaboration Review	Document Maintenance		Set ID: "MDC" Ad Hoc ID: "MRQ0000037".72	Mark Worked

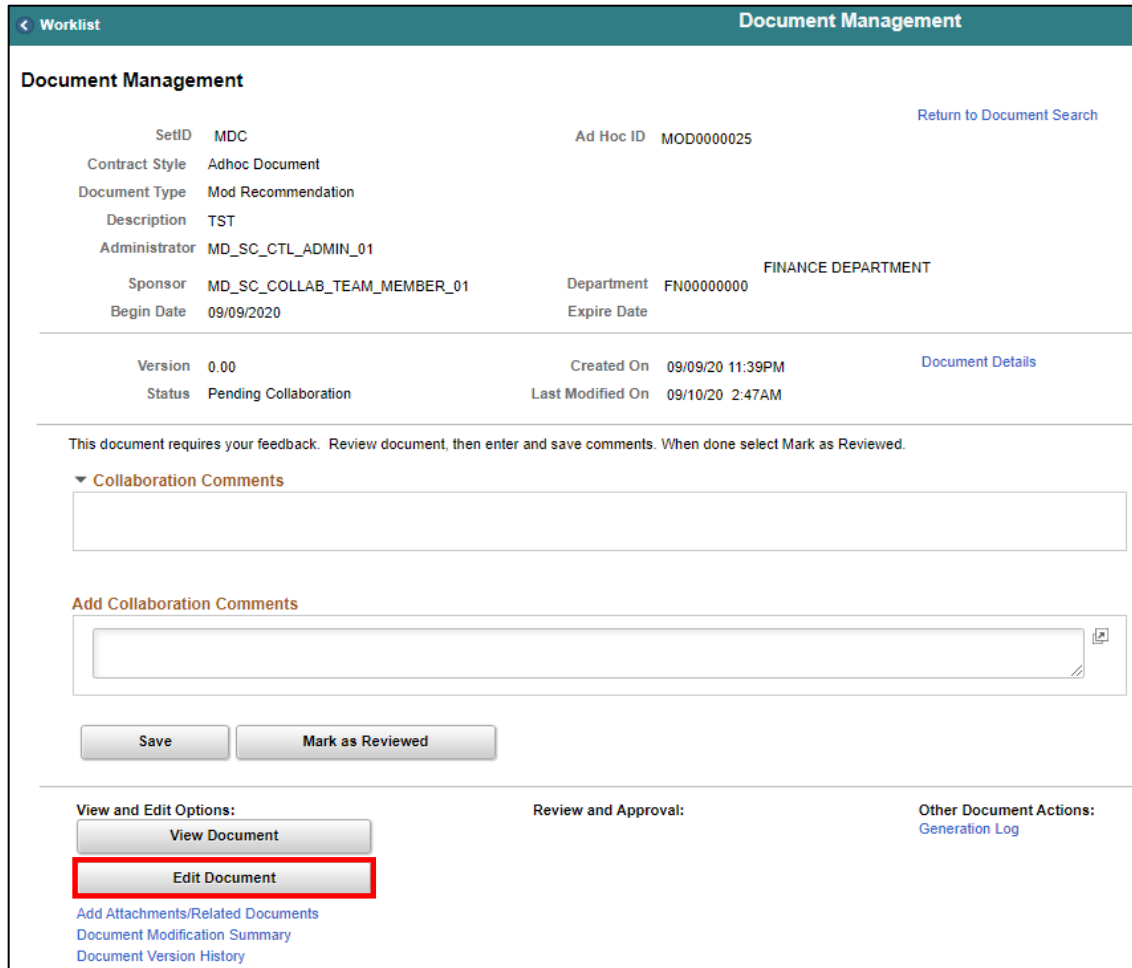
Refresh



## Lesson 2: Collaborate on Documents

### Lecture 1: Collaborate on Documents

- The Document Management page is displayed. Review the header information, then select **Edit Document**.



**Document Management**

SetID MDC Ad Hoc ID MOD0000025 [Return to Document Search](#)

Contract Style Adhoc Document

Document Type Mod Recommendation

Description TST

Administrator MD\_SC\_CTL\_ADMIN\_01

Sponsor MD\_SC\_COLLAB\_TEAM\_MEMBER\_01 Department FINANCE DEPARTMENT

Begin Date 09/09/2020 Expire Date

Version 0.00 Created On 09/09/20 11:39PM [Document Details](#)

Status Pending Collaboration Last Modified On 09/10/20 2:47AM

This document requires your feedback. Review document, then enter and save comments. When done select Mark as Reviewed.

▼ Collaboration Comments

Add Collaboration Comments

Save Mark as Reviewed

View and Edit Options: [Add Attachments/Related Documents](#) [Document Modification Summary](#) [Document Version History](#)

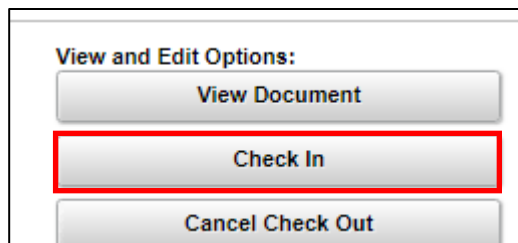
Review and Approval:

Other Document Actions: [Generation Log](#)

View Document

**Edit Document**

- Edit and save the Word document to the local hard drive.
- Check In** the edited document.



View and Edit Options:

View Document

**Check In**

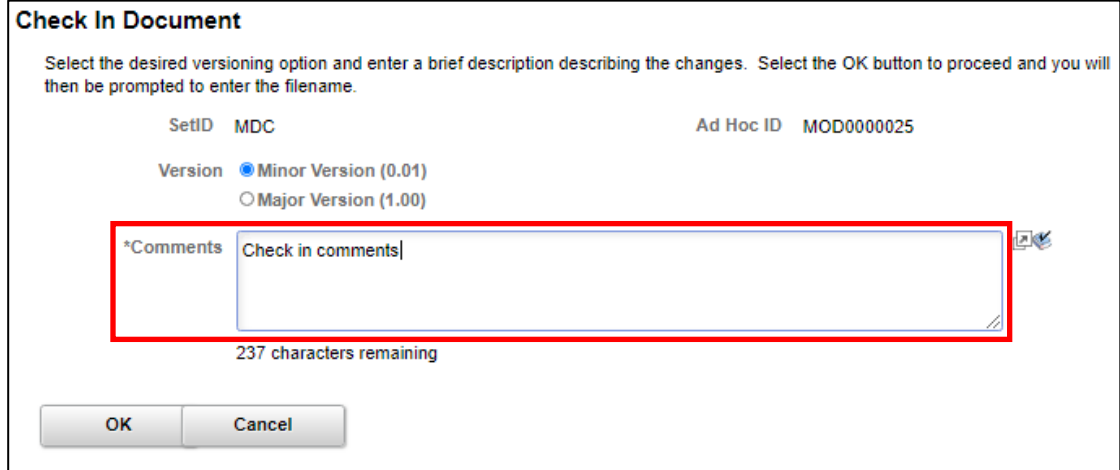
Cancel Check Out



## Lesson 2: Collaborate on Documents

### Lecture 1: Collaborate on Documents

6. Enter **Comments** as desired.



**Check In Document**

Select the desired versioning option and enter a brief description describing the changes. Select the OK button to proceed and you will then be prompted to enter the filename.

SetID MDC Ad Hoc ID MOD0000025

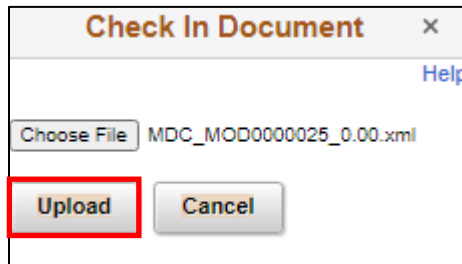
Version ☒ Minor Version (0.01)  
☐ Major Version (1.00)

\*Comments Check in comments|

237 characters remaining

OK Cancel

7. In the Check in Document popup window, select the file that was saved earlier and then select the **Upload** button.



**Check In Document** x

Help

Choose File MDC\_MOD0000025\_0.00.xml

Upload Cancel

8. Once the document is uploaded, select **Mark as Reviewed**.



**Add Collaboration Comments**

Check in comments

Save Mark as Reviewed

**View and Edit Options:**

View Document

Edit Document

Add Attachments/Related Documents

**Review and Approval:**



## Lesson 2: Lesson Summary

### Lesson Summary



Now that the users have completed the Collaborate on Documents lesson, users should be able to:

- Collaborate on Supplier Contract Documents



## **Lesson 3: Negotiate Supplier Contract Document**

**Lesson 3:** At the conclusion of this lesson, participants will be able to:

**Introduction**

- Negotiate Supplier Contract Documents



## Lesson 3: Negotiate Supplier Contract Document

### Lesson 3: Steps for Negotiating a Supplier Contract Document

#### Introduction

1. Create Supplier Contract.
2. Amend Supplier Contract.
3. Make document available for supplier to review.
4. Send document to supplier (supplier portal or email).
5. Receive draft contract and review.
6. Follow contract acceptance/update process and return to supplier.
7. Receive updated draft from supplier.
8. Receive updated status, review and incorporate comments, changes, as appropriate.
  - If Collaboration is Yes, Go to task number 12.
  - If No, Go to task number 9.
9. Prepare and route for external/internal signatures before approval, if needed (portal option for supplier).
  - If Action is Refresh reference variables and update new values on document, Go to task number 10.
  - If Action is Regenerate document, Go to task number 11.
  - If Action is Prepare for signatures, Go to task number 13.
  - If Action is Approve Supplier Contract, Go to task number 14.
  - If Action is Deactivate document, Go to task number 15.
10. Refresh reference variables and update new values on document.
11. Regenerate Document
12. Create Supplier Contract
13. Prepare for Signatures
14. Approve Supplier Contracts
15. Deactivate Document



### Lesson 3: Negotiate Supplier Contract Document

#### Key Terms

The following key terms are used in this Lesson:



Term	Definition
<b>Collaboration</b>	An optional function used when creating contract documents to share and track edits to documents across internal and external collaborators.
<b>Collaborators</b>	Internal or external users, other than the primary owner of the contract, who can review or change contract documents. Collaborators can be added or deleted by document owners at any time.
<b>Contract Document</b>	A textual document the user can associate with a transactional purchasing contract, solicitation or a Purchasing. Contract Documents are signed agreements that bind buyers and suppliers to specific terms and conditions.
<b>Digital Signatures</b>	Cryptographically-based signature assurance schemes that are tied to users by a digital identity certificate. INFORMS Supplier Contract Management supports the ability to lock down the Microsoft Word version of a contract and prepare an equivalent and separate PDF file that the system uses to capture signatures only. The users can capture signatures at any time.



### Lesson 3: Training Activity 1

**Demonstration** The Instructor will now demonstrate how to execute the business process through the User Productivity Kit (UPK).

**Instructions** Please refer to Activity 3 on the SCM 205 Training Activity Guide and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 205 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available if users have questions.



### Lesson 3: Training Exercise

#### Debrief



1. True or False? Collaboration is required for all Contracts.

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2. True or False? Collaborators can be both internal MDC users and External Suppliers.

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### Lesson 3: Lesson Summary

#### Lesson Summary



Now that users have completed the Negotiate Supplier Contract Documents lesson, users should be able to:

- Negotiate Supplier Contract Documents



## **Lesson 4: Approve Supplier Contract Document**

**Lesson 1:** At the conclusion of this lesson, participants will be able to:

- Introduction**
- Submit a contract document for approval
  - Approve a contract document

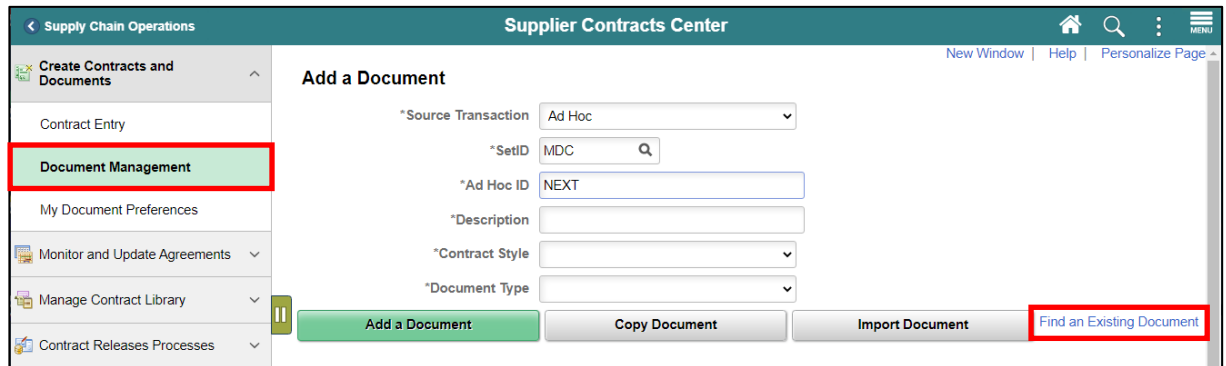


## Lesson 4: Approve Supplier Contract Document

### Lecture 1: Submit for Approval

Once all collaborators and suppliers have reviewed the document as needed, the contract can be submitted for approval. The document will automatically be routed to the first approver, and then to subsequent approvers as designated in the approval workflow. The originator and approvers also have the ability to add an Ad-hoc approver/reviewer to route the document to individuals who are not in the workflow.

1. Navigate to the **Document Management** page: **Finance / Supply Chain (FSCM) tile > Supply Chain Operations > Supplier Contracts Center > Document Management**
2. Select **Find an Existing Document**.



The screenshot shows the 'Supplier Contracts Center' interface. On the left, the 'Document Management' option is highlighted in the sidebar. The main area is titled 'Add a Document' and contains several input fields: '\*Source Transaction' (set to 'Ad Hoc'), '\*SetID' (set to 'MDC'), '\*Ad Hoc ID' (set to 'NEXT'), '\*Description', '\*Contract Style', and '\*Document Type'. At the bottom, there are four buttons: 'Add a Document', 'Copy Document', 'Import Document', and 'Find an Existing Document'. The 'Find an Existing Document' button is highlighted with a red box.

3. Enter the search criteria, or just select **Search** to find all documents. Select the link in the Search Results section to open the **Document Management** page.

**Additional Search Criteria**

**Search**   [Keyword Search](#)

**Search Results**

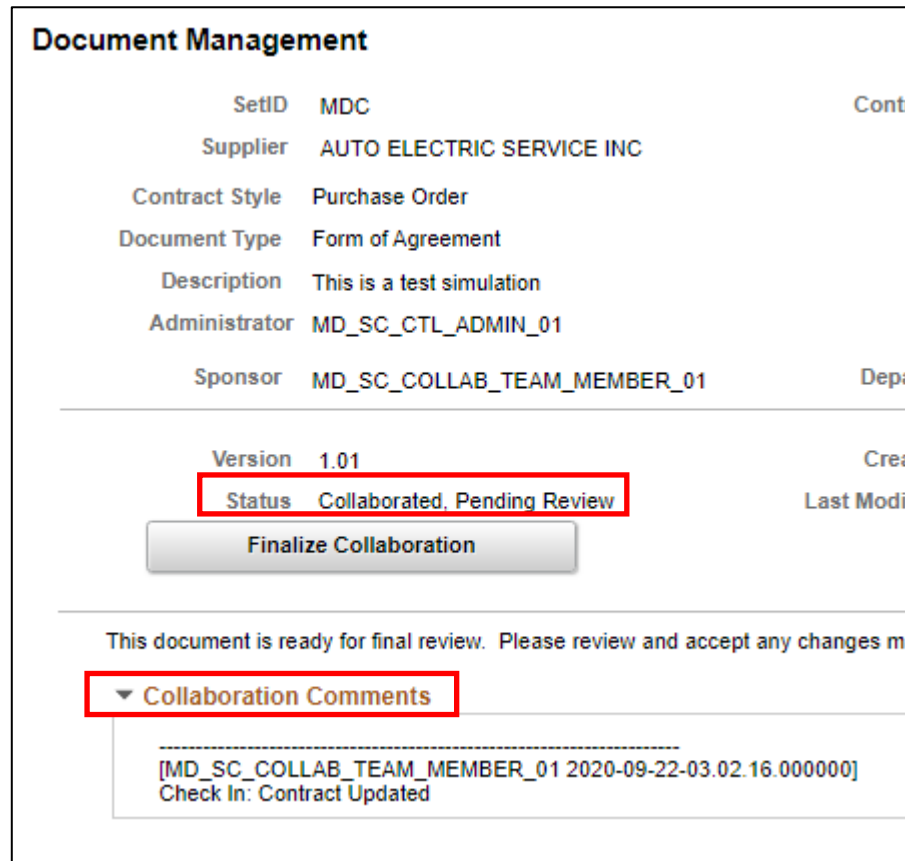
Document Keys	Description	Document Version	Amendment	Document Status
<a href="#">MDC / GRP0000044</a>	Training	1.00	0	Draft
<a href="#">MDC / GRP0000042</a>	UAT Test Don	0.00	0	Draft
<a href="#">MDC / 000000036</a>	This is a test simulation	1.01	0	Collaborated, Pending Review



## Lesson 4: Approve Supplier Contract Document

### Lecture 1: Submit for Approval

4. Confirm that the Status is **Collaborated, Pending Review** and check the **Collaboration Comments**.



**Document Management**

SetID	MDC	Cont
Supplier	AUTO ELECTRIC SERVICE INC	
Contract Style	Purchase Order	
Document Type	Form of Agreement	
Description	This is a test simulation	
Administrator	MD_SC_CTL_ADMIN_01	
Sponsor	MD_SC_COLLAB_TEAM_MEMBER_01	Depa

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Version	1.01	Crea
Status	Collaborated, Pending Review	Last Mod

**Finalize Collaboration**

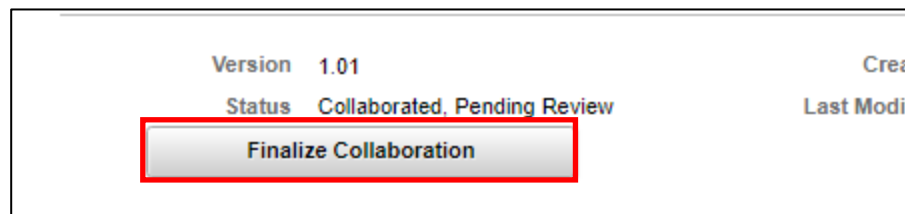
---

This document is ready for final review. Please review and accept any changes m

▼ **Collaboration Comments**

[MD\_SC\_COLLAB\_TEAM\_MEMBER\_01 2020-09-22-03:02:16.000000]  
Check In: Contract Updated

5. Select **Finalize Collaboration**. Approval options will display.



Version	1.01	Crea
Status	Collaborated, Pending Review	Last Mod

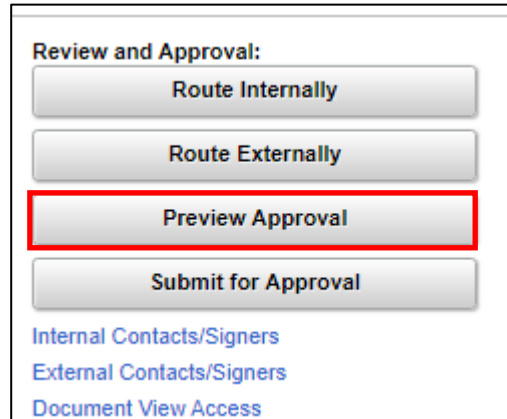
**Finalize Collaboration**



## Lesson 4: Approve Supplier Contract Document

### Lecture 1: Submit for Approval

6. Select the **Preview Approval** button to view the Approval Path.



Review and Approval:

Route Internally

Route Externally

**Preview Approval**

Submit for Approval

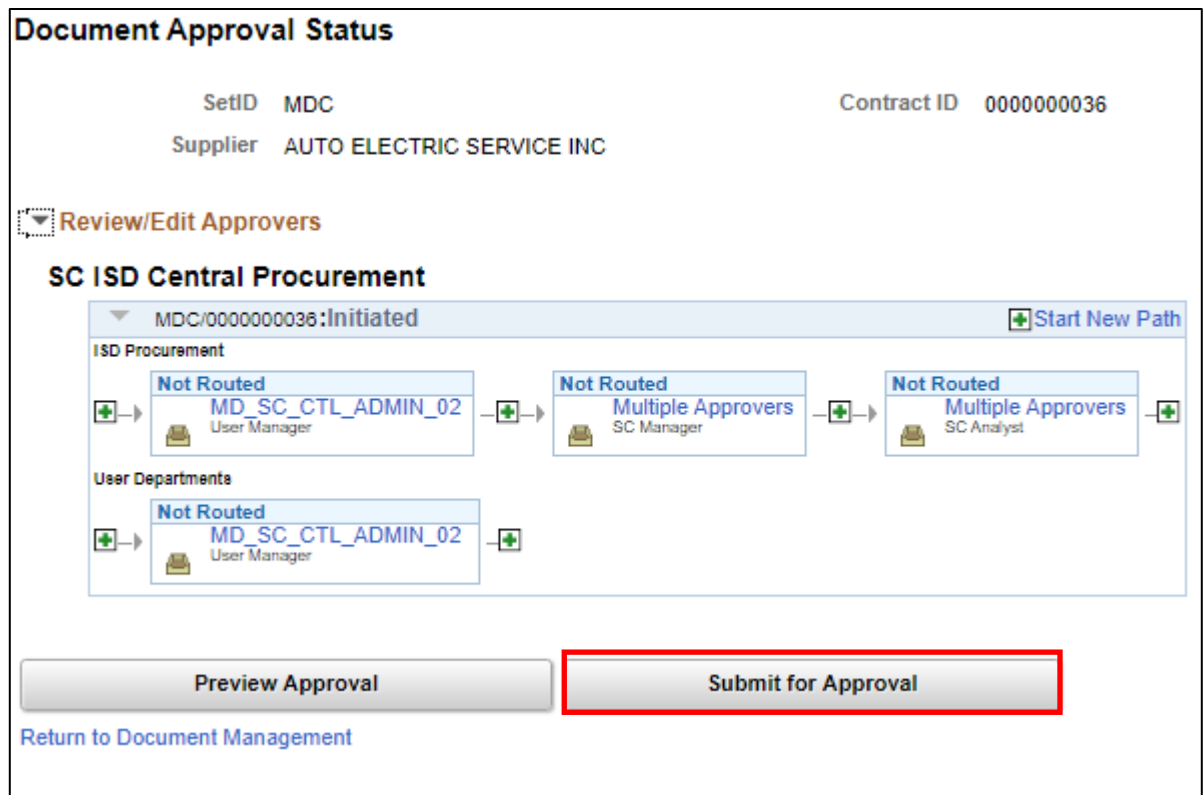
[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

The **Approval Path** is configured to meet the requirements of each Department. The document is automatically routed to each approver in turn. This tool can be used to check the approval status at any time.

7. Select **Submit for Approval**. This will initiate the workflow and route the document to the first user in the approval path. Save the page.



**Document Approval Status**

SetID MDC Contract ID 0000000036

Supplier AUTO ELECTRIC SERVICE INC

☐ Review/Edit Approvers

**SC ISD Central Procurement**

MDC/0000000036:Initiated [Start New Path](#)

ISD Procurement

Not Routed MD\_SC\_CTL\_ADMIN\_02 User Manager

Not Routed Multiple Approvers SC Manager

Not Routed Multiple Approvers SC Analyst

User Departments

Not Routed MD\_SC\_CTL\_ADMIN\_02 User Manager

[Preview Approval](#) **[Submit for Approval](#)**

[Return to Document Management](#)



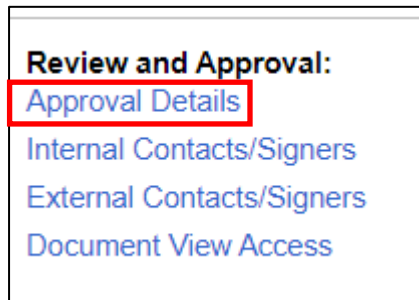
## Lesson 4: Approve Supplier Contract Document

### Lecture 1: Submit for Approval

8. The Approval path does not automatically update. To view it after submitting, select the **Return to Document Management** link.

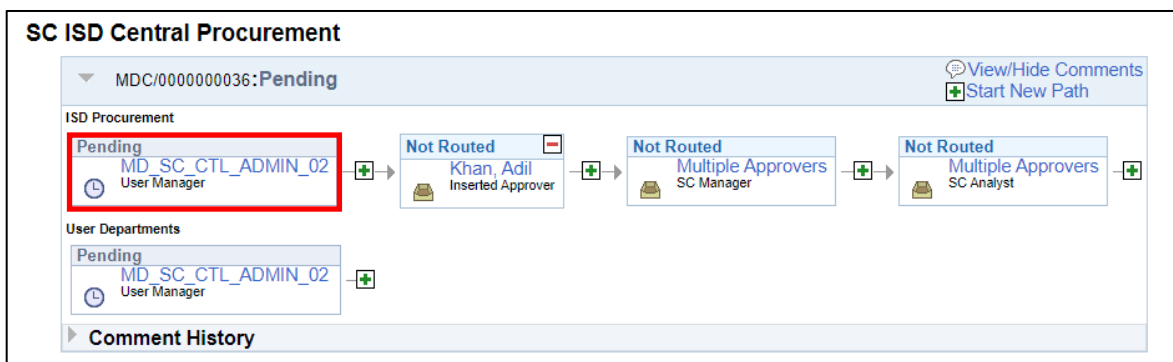


9. Select the Approval Details link in the Review and Approval section.



10. The first approver has changed from **Not Routed** to **Pending**.

- Note: Some approvals can be done in parallel and some approvals must be done in a linear manner. When an approval path is done in a linear manner, subsequent approvals will be marked as “Not Routed” until the previous required approvals are complete. When an approval path is done in a parallel manner, parallel approvers will be marked as “Pending” and are not dependent on each other before one approver can proceed.

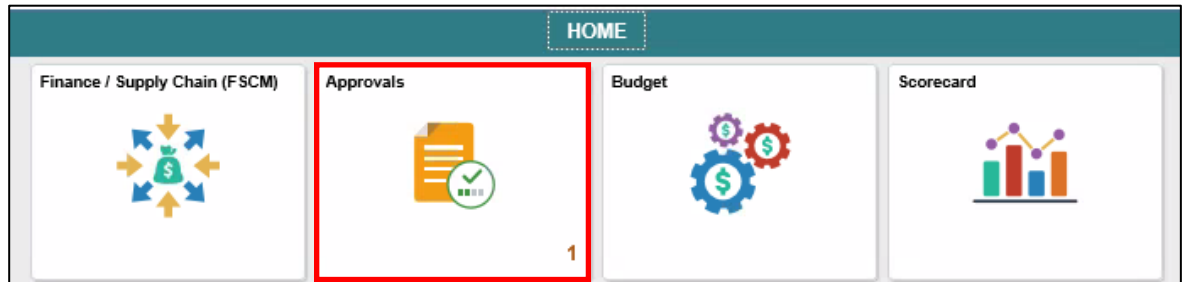




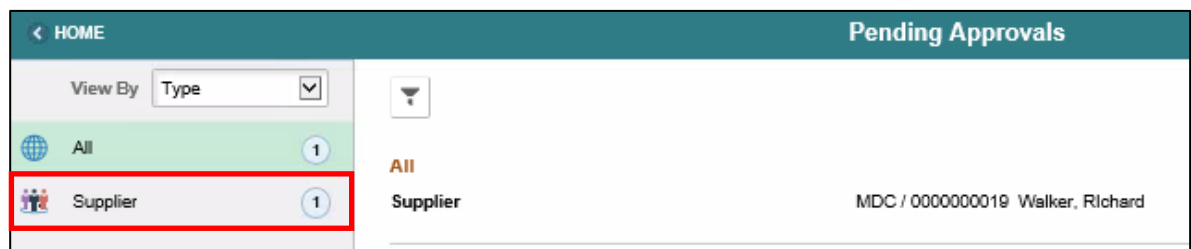
## Lesson 4: Approve Supplier Contract Document

### Lecture 2: Approve Contract Document

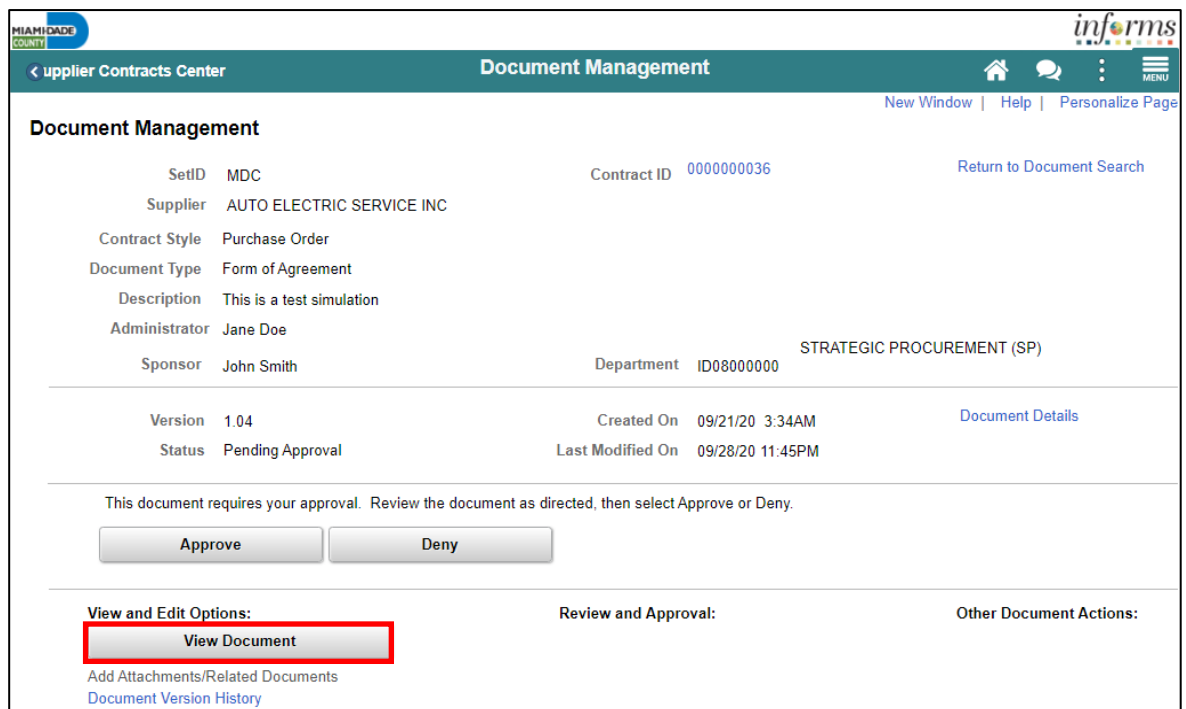
1. Navigate to the **Pending Approval worklist**. The number in the lower right corner shows how many approvals are Pending.



2. Select the desired approval from the list.



3. The Document Management page is displayed. Select **View Document** to review the contract document.

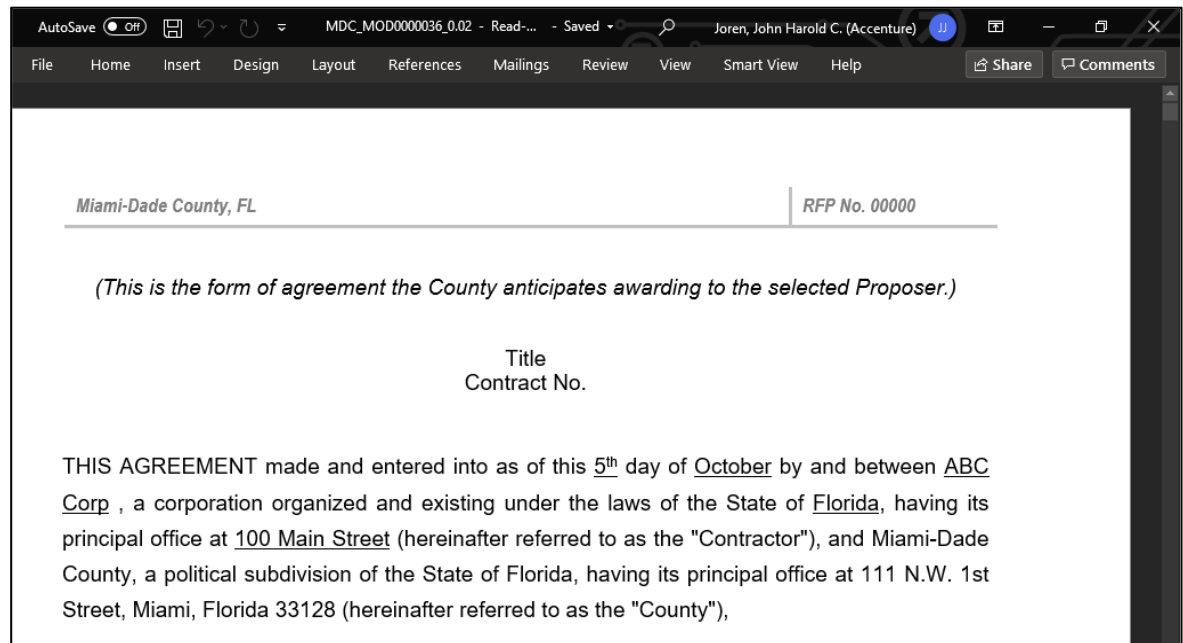




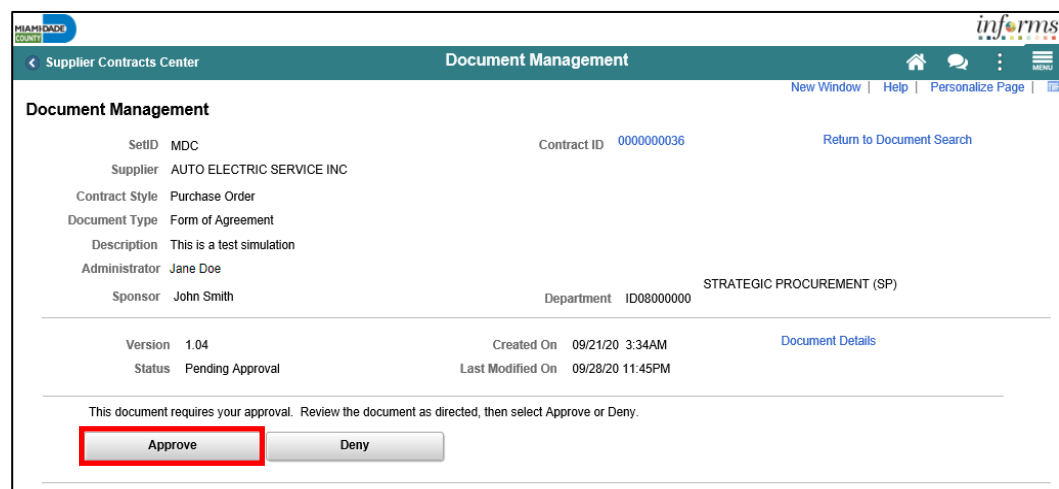
## Lesson 4: Approve Supplier Contract Document

### Lecture 2: Approve Contract Document

- The document will open in a separate MS Word window. Review the contract, then **Close** the Word window.



- On the Document Management page, select **Approve**. This will open a confirmation page.





## Lesson 4: Approve Supplier Contract Document

### Lecture 2: Approve Contract Document

6. On the Confirmation page, select **Approve**.

**Approval Confirmation**

✓ This Document Will Be "Approved". Press "Approve" to Confirm or "Cancel" to return without approving.

**Approve** **Cancel**

▼ **Review/Edit Approvers**

**SC ISD Central Procurement**

▼ MDC/GRP0000044: Pending [Request Information](#) [Start New Path](#)

ISD Procurement

Pending MD\_SC\_CTL\_ADMIN\_02 User Manager → Not Routed Multiple Approvers SC Manager → Not Routed Multiple Approvers SC Analyst →

User Departments

Pending MD\_SC\_CTL\_ADMIN\_02 User Manager →

7. The Approval path is updated, and the document is routed to the next approver.

▼ **Review/Edit Approvers**

**SC ISD Central Procurement**

▼ MDC/GRP0000044: Pending [Start New Path](#)

ISD Procurement

Approved MD\_SC\_CTL\_ADMIN\_02 User Manager 09/25/20 - 10:14 AM → Pending Multiple Approvers SC Manager → Not Routed Multiple Approvers SC Analyst →

User Departments

Approved MD\_SC\_CTL\_ADMIN\_02 User Manager 09/25/20 - 10:14 AM →



## Lesson 4: Training Activity 1

**Demonstration** The Instructor will now demonstrate how to execute the business process through the User Productivity Kit (UPK).

**Instructions** Please refer to Activity 4 on the SCM 205 Training Activity Guide and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 205 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available if users have questions.



## Lesson 4: Training Exercise

### Debrief

1. True or False? All approvals must be done in a linear manner meaning two approvers cannot approve a document at the same time.



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2. True or False? Adding an Ad-Hoc reviewer to the approval path requires the Ad-Hoc reviewers' approval before the document can be approved.

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## Lesson 4: Lesson Summary

### Lesson Summary



Now that the users have completed the Approve Supplier Contract Document lesson, users should be able to:

- Submit a contract document for approval
- Approve a contract document



## Lesson 5: Execute Supplier Contract Document

**Lesson 5:** At the conclusion of this lesson, participants will be able to:

### Introduction

- Dispatch Supplier Contract Document
- Execute Supplier Contract Document



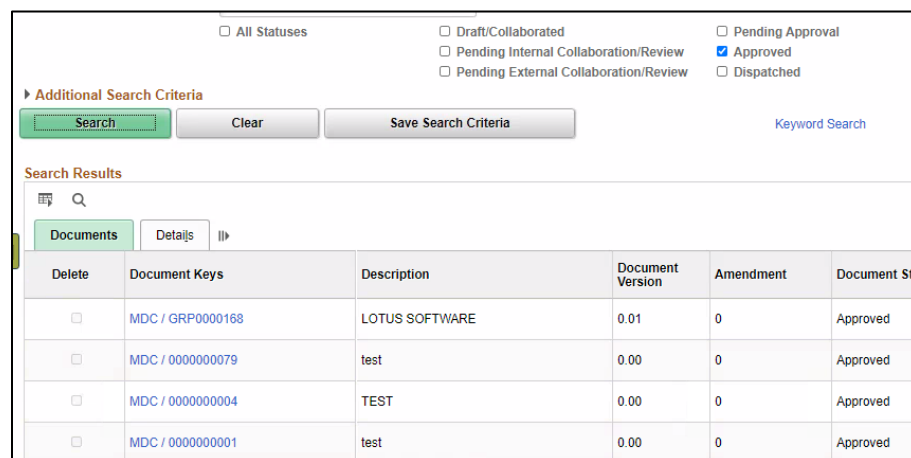
## Lesson 5: Execute Supplier Contract Document

### Lecture 1: Dispatch Supplier Contract

After a contract document has been approved the document will be routed to signers for signature. The contract document must have all signatures to be executed. If signatures are missing, the contract can be routed again.

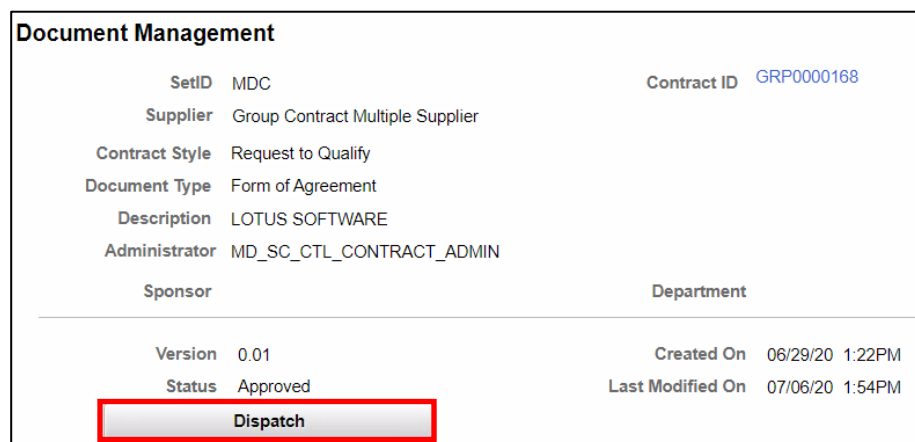
The contract document may contain wet and digital signatures. After all parties sign the contract, the document is **dispatched** to the suppliers. After a document is executed, transactions such as Requisitions and Purchase Orders can be processed against the contract. Once executed, contracts are available for amendment. The user designates the different types of Delivery Method, File Type, Contacts and the Subject and Description of the Execution in the **Dispatch** procedure.

1. Navigate to the **Document Management** page: **Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contract Center > Document Management**.
2. Select **Find Existing Document** then search for sample contracts that are already approved (This to execute a dispatch for the supplier contract document).



Delete	Document Keys	Description	Document Version	Amendment	Document Status
<input type="checkbox"/>	MDC / GRP0000168	LOTUS SOFTWARE	0.01	0	Approved
<input type="checkbox"/>	MDC / 0000000079	test	0.00	0	Approved
<input type="checkbox"/>	MDC / 0000000004	TEST	0.00	0	Approved
<input type="checkbox"/>	MDC / 0000000001	test	0.00	0	Approved

3. Select any of the approved documents. Select **Dispatch** button once user has been transferred from the Document Management Page.



**Document Management**

SetID: MDC Contract ID: GRP0000168

Supplier: Group Contract Multiple Supplier

Contract Style: Request to Qualify

Document Type: Form of Agreement

Description: LOTUS SOFTWARE

Administrator: MD\_SC\_CTL\_CONTRACT\_ADMIN

Sponsor: Department:

Version: 0.01 Created On: 06/29/20 1:22PM

Status: Approved Last Modified On: 07/06/20 1:54PM

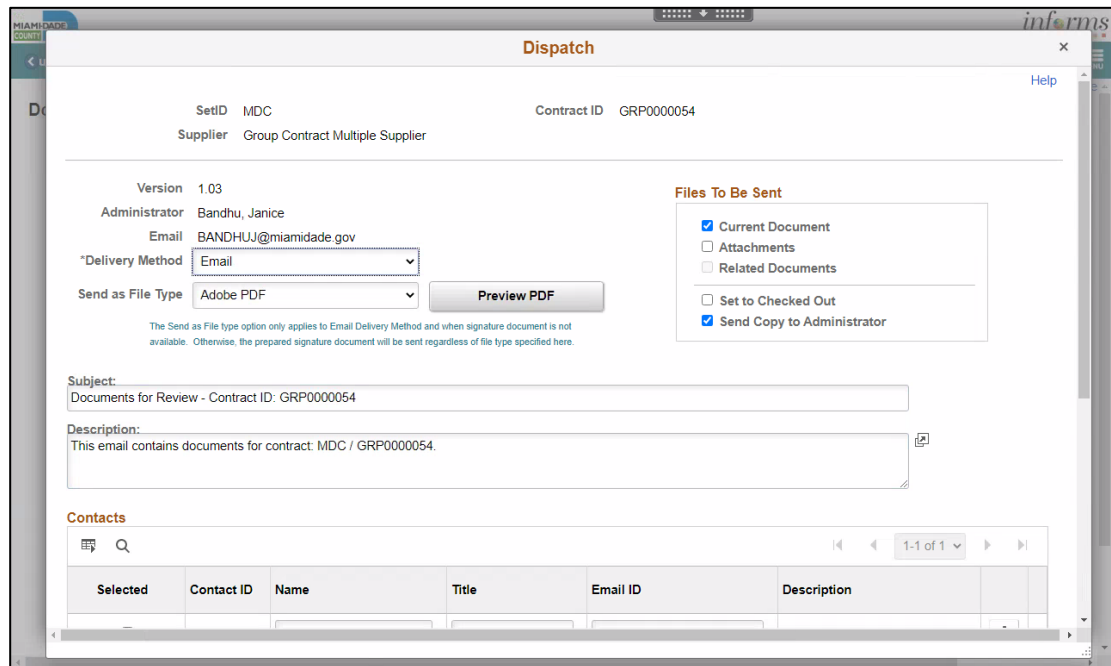
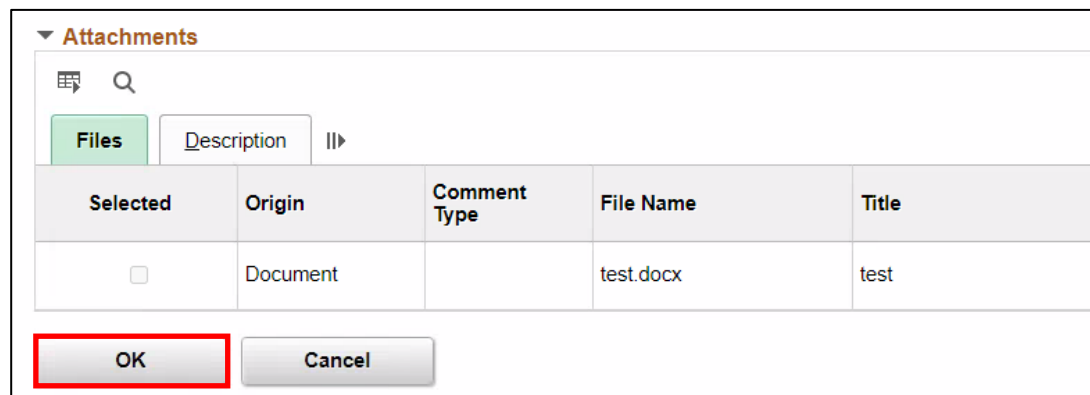
**Dispatch**



## Lesson 5: Execute Supplier Contract Document

### Lecture 1: Dispatch Supplier Contract

- Set up the dispatch execution by filling and selecting the different types of Delivery Method, File Type, Contacts and the Subject and Description of the Execution. Then Select **OK**.

Selected	Origin	Comment Type	File Name	Title
<input type="checkbox"/>	Document		test.docx	test



## Lesson 5: Execute Supplier Contract Document

### Lecture 2: Execute Supplier Contract Document

#### Execute a Supplier Contract

1. The contract status is now “Dispatched”, and the **Execute Contract** button now appears. Select the **Execute Contract** button to execute supplier contract document.

Version	0.01	Created On	06/29/20 1:22PM
Status	Dispatched	Last Modified On	10/07/20 1:16PM
<div>Redispatch</div> <div><b>Execute Contract</b></div>			

2. The purchasing contract status is now set to **Executed**.

Document Management			
SetID	MDC	Contract ID	<a href="#">GRP0000168</a>
Supplier	Group Contract Multiple Supplier		
Contract Style	Request to Qualify		
Document Type	Form of Agreement		
Description	LOTUS SOFTWARE		
Administrator	MD_SC_CTL_CONTRACT_ADMIN		
Sponsor	Department		
Version	0.01	Created On	06/29/20 1:22PM
<b>Status</b>	<b>Executed</b>	Last Modified On	10/07/20 1:19PM
<div>Reset to Dispatch</div> <div>Create Amendment</div>		Executed On	10/07/20 1:19:12PM



## Lesson 5: Execute Supplier Contract Document

### Key Terms

The following key terms are used in this Lesson:



Term	Definition
<b>Agreements</b>	Agreements, also called deliverables, provide a mechanism to define and manage internal and external agreements for the contract.
<b>Contract Document</b>	A textual document the user can associate with a transactional purchasing contract, solicitation or a Purchasing. Contract Documents are signed agreements that bind buyers and suppliers to specific terms and conditions.
<b>Digital Signatures</b>	Cryptographically-based signature assurance schemes that are tied to users by a digital identity certificate. INFORMS Supplier Contract Management supports the ability to lock down the Microsoft Word version of a contract and prepare an equivalent and separate PDF file that the system uses to capture signatures only. The users can capture signatures at any time.



## Lesson 5: Training Activity 1

**Demonstration** The Instructor will now demonstrate how to execute the business process through the User Productivity Kit (UPK).

**Instructions** Please refer to Activity 5 on the SCM 205 Training Activity Guide and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 205 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available if users have questions.



## Lesson 5: Training Exercise

### Debrief



1. True or False? A user will need to execute a contract after the dispatched contract has been received back from the Supplier.

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2. True or False? A wet signature from the Supplier will still be required on all Supplier Contracts created even if the Supplier has signed the document electronically.

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## Lesson 5: Lesson Summary

### Lesson Summary



Now that the users have completed the Execute Supplier Contract Document lesson, users should be able to:

- Dispatch Supplier Contract Document
- Execute Supplier Contract Document



## Lesson 6: Amend Supplier Contract Document

**Lesson 6:** At the conclusion of this lesson, you will be able to:

**Introduction**

- Amend Supplier Contract Document



## Lesson 6: Amend Supplier Contract Document

### Lesson 6: Introduction

A contract document amendment is an update to an existing executed contract document. Supplier Contract Management provides three options for processing amendment updates. INFORMS generates and manages document processing based on an amendment option. Available Amendment options include the following:

1. Amend Contract Only
2. Amend Contract with Amendments
3. Amendment Files Only

The **Amend Contract only** option supports a single-document process used to make changes to the original document that has been executed. INFORMS makes a new copy of the executed document at the beginning of the amendment process.

The **Amend Contract with Amendments** option supports a two-document process to make changes to both the original executed document and a newly created amendment file. A new amendment file is created for each amendment cycle, and it is possible to automatically update the amendment file using updates made to the amended document.

The **Amendment Files only** option supports a single-document process used to make changes to a newly created amendment file. INFORMS creates a new amendment file for each amendment cycle. The amendment file will automatically be updated with changes made to the original document by the amendment configurator. After all the updates are made, the draft version of the amendment is generated using the selected configurator. Any existing documents that are no longer applicable can be deactivated. Documents can be brought back into service by reactivating them.



## Lesson 6: Amend Supplier Contract Document

**Lesson 6:** This process flow illustrates the processes that are used to create an amendment:  
**Introduction**

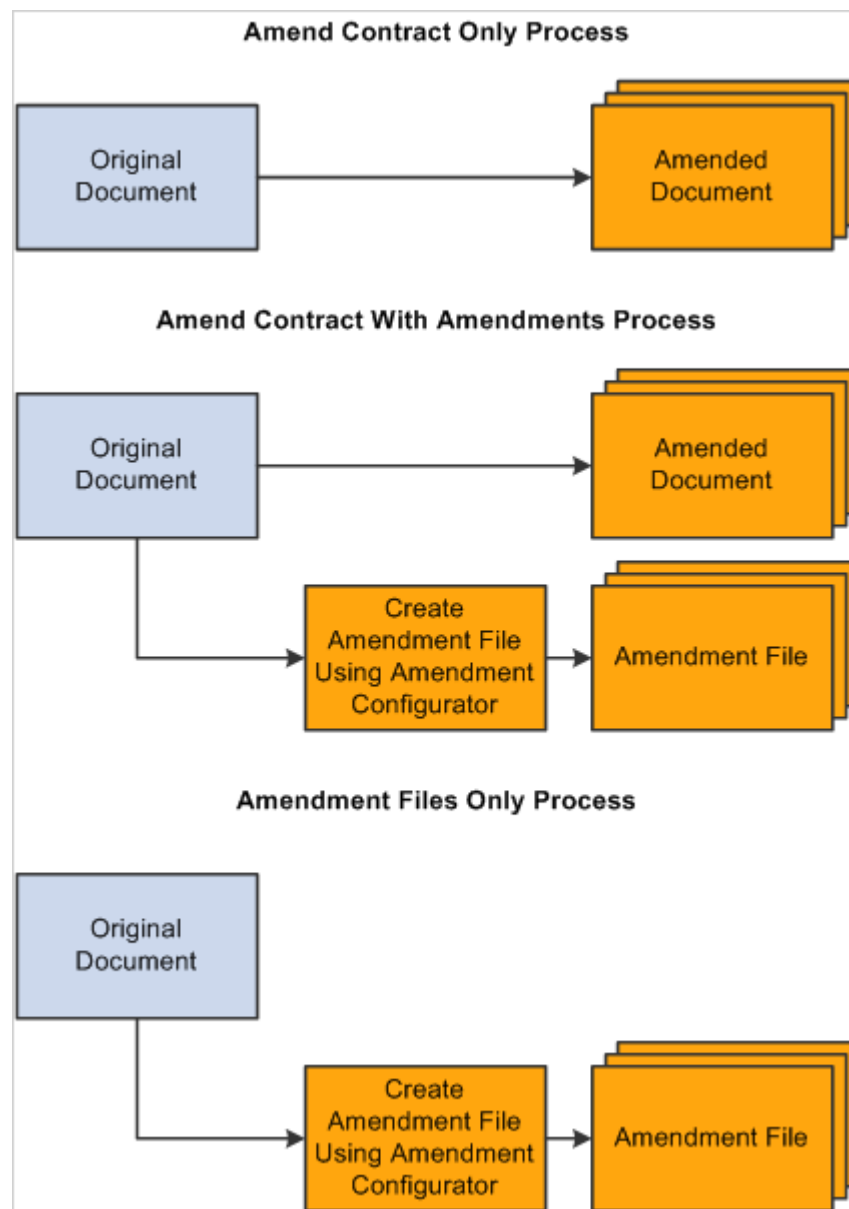


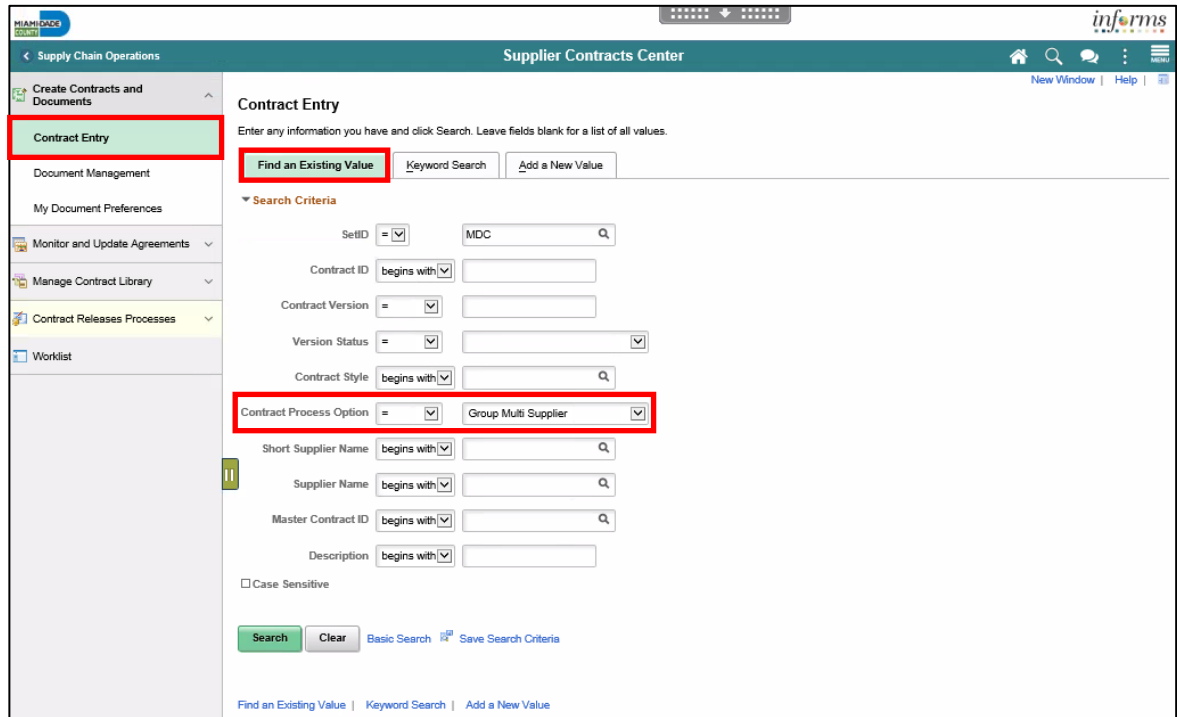
Figure 1: Business Process for Amendments of Contractors



## Lesson 6: Amend Contract Document

### Lecture 1: Amend Contract Document

1. Navigate to the **Document Management** page: **Finance / Supply Chain (FSCM) > Supply Chain Operations > Supplier Contract Center > Document Management**.
2. On the **Find an Existing Value** tab, search for a contract. Ensure the Set ID is **MDC**, and in the Contract Process Option select **Group Multi Supplier**.



**Supplier Contracts Center**

**Contract Entry**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** | Keyword Search | Add a New Value

**Search Criteria**

SetID =

Contract ID

Contract Version =

Version Status =

Contract Style

Contract Process Option =

Short Supplier Name

Supplier Name

Master Contract ID

Description

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Keyword Search](#) | [Add a New Value](#)

3. Select **Search** and select one of the Approved contracts.

**Search** | **Clear** | [Basic Search](#) | [Save Search Criteria](#)

Search Results

Only the first 300 results can be displayed.

[View All](#) | 1-100 of 300

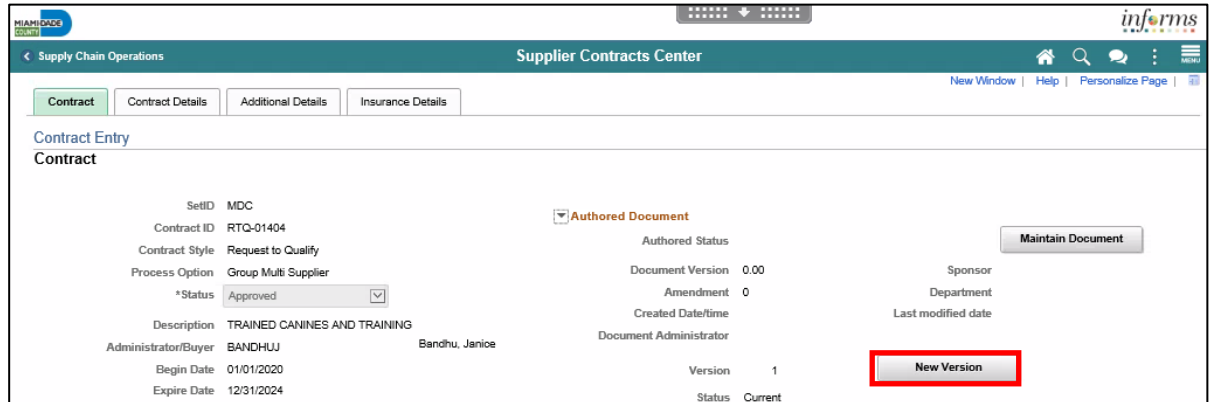
SetID	Contract ID	Contract Version	Version Status	Contract Style	Contract Process Option	Supplier ID	Short Supplier Name	Supplier Name	Expire Date	Contract Status	Master Contract ID	Description
MDC	Z00099A-R	1	Current	Construction	Grp Multi	MDMULTIPLE	MDMULTIPLE-001	Group Contract Multiple Supplier	12/04/2020	Open	(blank)	CONSTR OF THE LARCE
MDC	Z00099	1	Current	Professional Svcs. Agreement	Grp Multi	MDMULTIPLE	MDMULTIPLE-001	Group Contract Multiple Supplier	10/08/2020	Approved	(blank)	PSA DESIGN SVCS FOR R
MDC	Z000176	1	Current	Construction	Grp Multi	MDMULTIPLE	MDMULTIPLE-001	Group Contract Multiple Supplier	01/20/2021	Approved	(blank)	DESIGN & BUILD N HIALEA



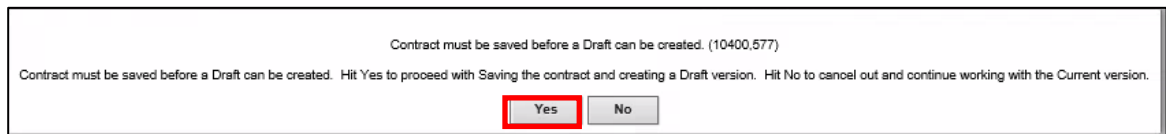
## Lesson 6: Amend Contract Documents

### Lecture 1: Amend Contract Document

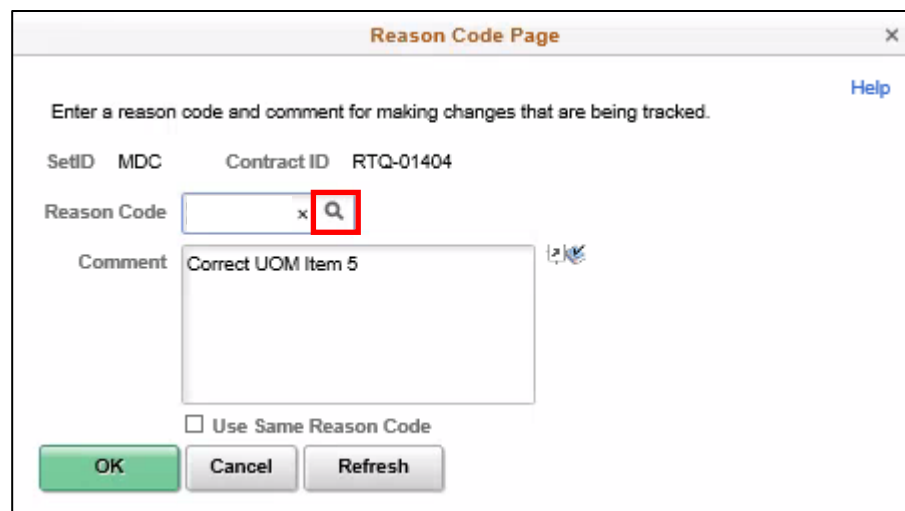
4. The **Contract Entry** page displays. Select the **New Version** button to amend the contract.



5. A warning message appears. Select **Yes** to create a new Draft.



6. A **Reason Code** popup appears. Select the **Reason Code** field to look up the code.

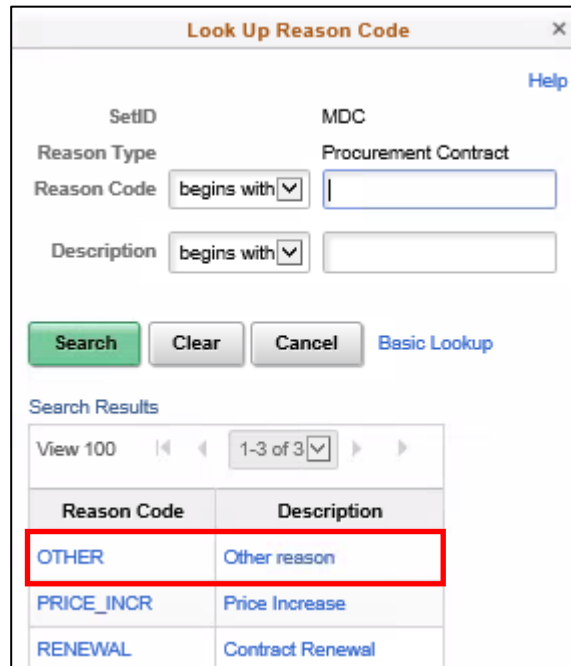




## Lesson 6: Amend Contract Document

### Lecture 1: Amend Contract Document

7. Select the Reason Code **OTHER** from the list.



**Look Up Reason Code** [X] [Help](#)

SetID MDC  
Reason Type Procurement Contract

Reason Code begins with [v] [ ]

Description begins with [v] [ ]

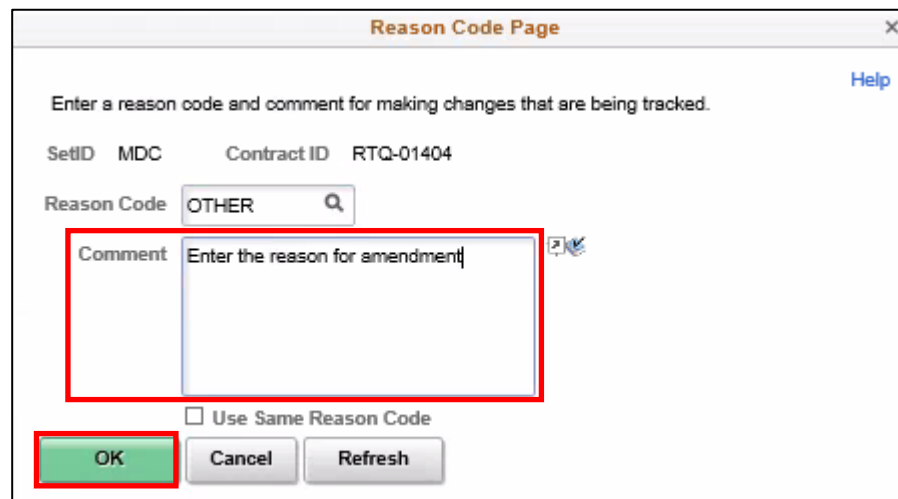
**Search** **Clear** **Cancel** [Basic Lookup](#)

Search Results

View 100 |<< 1-3 of 3 >>|

Reason Code	Description
OTHER	Other reason
PRICE_INCR	Price Increase
RENEWAL	Contract Renewal

8. On the **Reason Code** page, enter the details of the amendment in the **Comment** field, then select **OK**.



**Reason Code Page** [X] [Help](#)

Enter a reason code and comment for making changes that are being tracked.

SetID MDC Contract ID RTQ-01404

Reason Code OTHER [Q]

Comment Enter the reason for amendment [P] [U]

☐ Use Same Reason Code

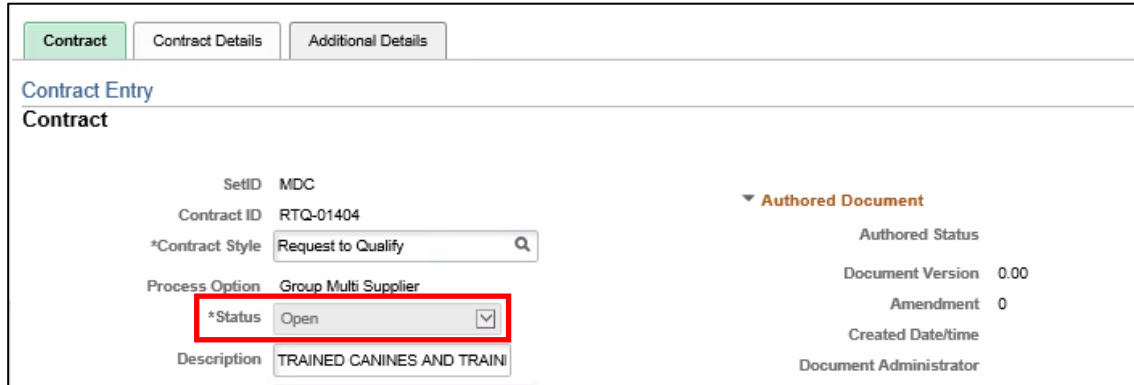
**OK** **Cancel** **Refresh**



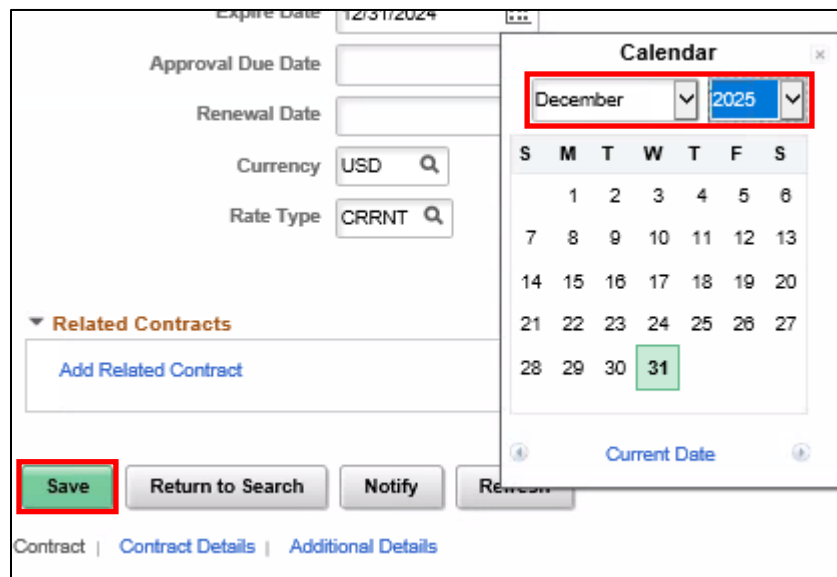
## Lesson 6: Amend Contract Documents

### Lecture 1: Amend Contract Document

9. The Contract Entry page displays. The Status defaults to **Open**. Changes can now be made.



10. Select the **Expire Date** calendar option and extend it out one year. Select **Save** after changing the date.



11. Select the **View Changes** link on the Contract Entry page - The **Change Field for Contract Header** page displays in a new tab.





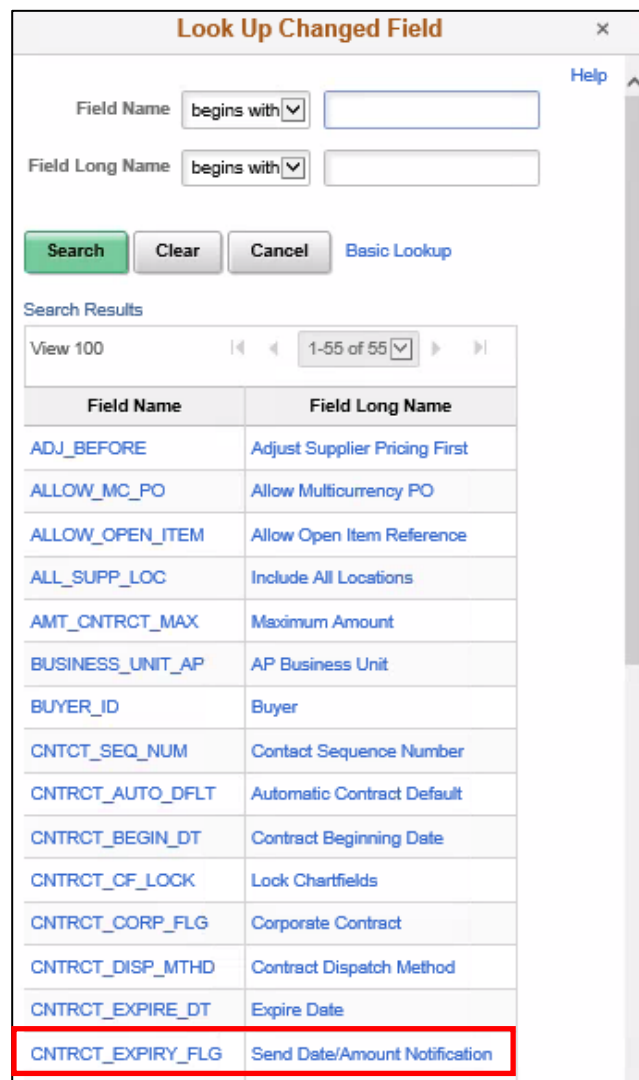
## Lesson 6: Amend Contract Documents

### Lecture 1: Amend Contract Document

12. Select the **Changed Field** lookup for the Contract Header row.



13. In the Look Up Changed Field window, select the **Field Name**.



Field Name	Field Long Name
ADJ_BEFORE	Adjust Supplier Pricing First
ALLOW_MC_PO	Allow Multicurrency PO
ALLOW_OPEN_ITEM	Allow Open Item Reference
ALL_SUPP_LOC	Include All Locations
AMT_CNTRCT_MAX	Maximum Amount
BUSINESS_UNIT_AP	AP Business Unit
BUYER_ID	Buyer
CNTCT_SEQ_NUM	Contact Sequence Number
CNTRCT_AUTO_DFLT	Automatic Contract Default
CNTRCT_BEGIN_DT	Contract Beginning Date
CNTRCT_CF_LOCK	Lock Chartfields
CNTRCT_CORP_FLG	Corporate Contract
CNTRCT_DISP_MTHD	Contract Dispatch Method
CNTRCT_EXPIRE_DT	Expire Date
CNTRCT_EXPIRY_FLG	Send Date/Amount Notification



## Lesson 6: Amend Contract Documents

### Lecture 1: Amend Contract Document

14. Select the **Search** button on the Changed Field for Contract Header page.

search to view the results.

Modified By

Reason Code

From Date

Version From

To Date

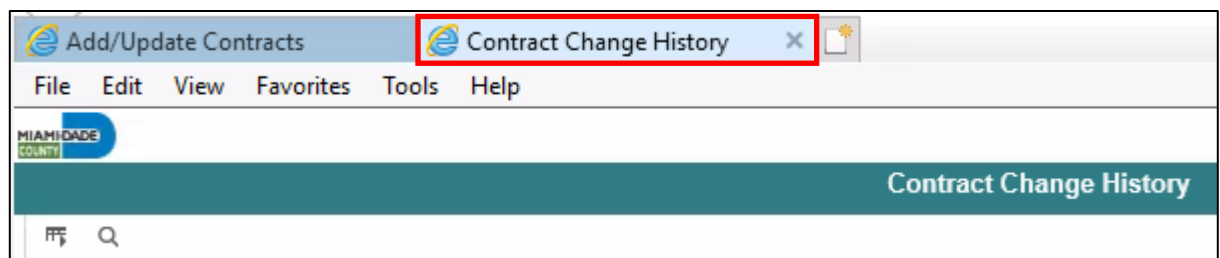
Version To

**Search** Clear Expand All Collapse All

15. The changes made on the Contract Header will be listed in the Results panel.

Contract Header								
Version	Sequence	Change Type	Description	Value	Modified By	Last Changed	Reason	
1	0	Original	Change Order Source	ONL	BANDHUJ	08/08/20 10:43:51AM	OTHER	
1	0	Original	Expire Date	12/31/2024	BANDHUJ	08/08/20 10:43:51AM	OTHER	

16. To return to the Contract Entry page, close the **Contract Change History** browser tab.



17. Select the **Edit Comments** link to add a comment about the change.

Version 2 **Delete Version**

Status Draft

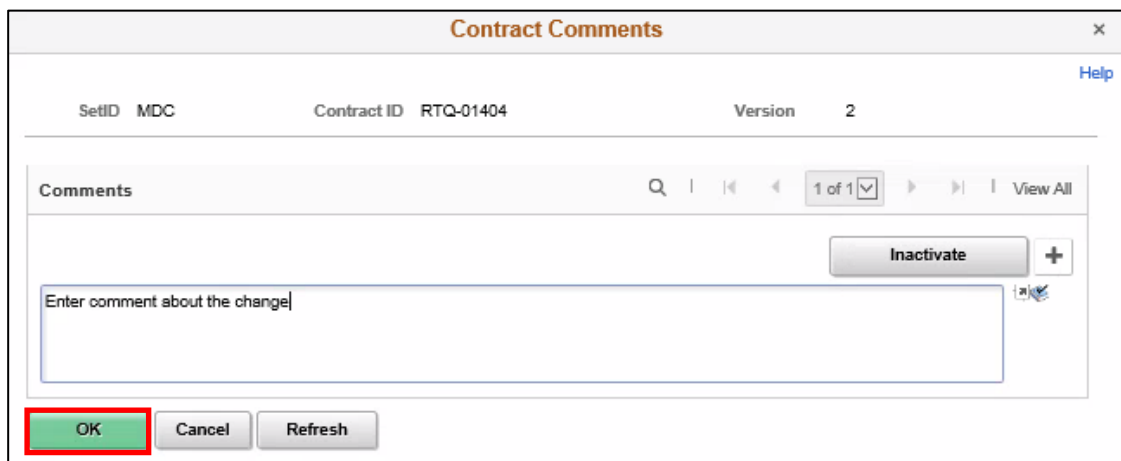
[Contract Header Agreement](#)  
[Thresholds & Notifications](#)  
[Edit Comments](#)  
[Activity Log](#)  
[Group Contract Summary](#)  
[View Changes](#)  
[MDC Allocations](#)  
[Custom Fields](#)



## Lesson 6: Amend Contract Documents

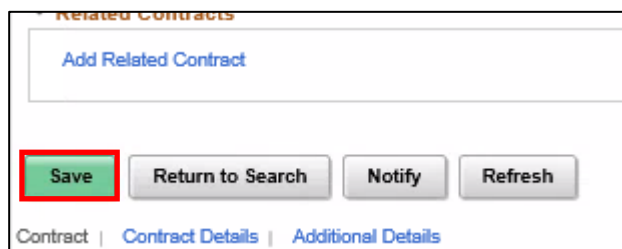
### Lecture 1: Amend Contract Document

18. Enter the reason for the amendment in the Comment field and then select **OK**.



The image shows a 'Contract Comments' dialog box. At the top, it displays 'SetID MDC' and 'Contract ID RTQ-01404' with 'Version 2' on the right. Below this is a 'Comments' section with a search icon, navigation arrows, and a '1 of 1' dropdown. A large text area contains the placeholder 'Enter comment about the change'. To the right of the text area is an 'Inactivate' button and a plus icon. At the bottom, there are three buttons: 'OK' (highlighted with a red border), 'Cancel', and 'Refresh'.

19. Select **Save** on the Contract Entry page.



The image shows a 'Related Contracts' section with a link 'Add Related Contract'. Below this is a row of four buttons: 'Save' (highlighted with a red border), 'Return to Search', 'Notify', and 'Refresh'. At the bottom, there is a breadcrumb trail: 'Contract | Contract Details | Additional Details'.



## Lesson 6: Amend Supplier Contract Document

### Key Terms

The following key terms are used in this Lesson:



Term	Definition
<b>Agreements</b>	Agreements, also called deliverables, provide a mechanism to define and manage internal and external agreements for the contract.
<b>Contract Document</b>	A textual document the user can associate with a transactional purchasing contract, solicitation or a Purchasing. Contract Documents are signed agreements that bind buyers and suppliers to specific terms and conditions.



## Lesson 6: Training Activity 1

**Demonstration** The Instructor will now demonstrate how to execute the business process through the User Productivity Kit (UPK).

**Instructions** Please refer to Activity 6 on the SCM 205 Training Activity Guide and Data Sheet.

This activity will be performed individually; users must complete it on their workstation using the INFORMS training environment. Instructors will explain how to log into INFORMS.

Users will perform the activity by following the SCM 205 Training Activity and Data Sheet and by using the training materials as reference tools.

Instructor(s) are available if users have questions.



## Lesson 6: Training Exercise

### Debrief

1. True or False? Any user with access to the Supplier Contract module will be able to amend contracts.



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2. True or False? INFORMS will automatically track changes to a Supplier Contract if it is amended.

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## Lesson 6: Lesson Summary

## Lesson Summary



Now that participants have completed the Amend Supplier Contract Document lesson, users should be able to:

- Amend Supplier Contract Documents



## Course Summary



- 112



## Module 5: Course Summary

### Objectives Achieved



Congratulations! Users have completed the Departmental Supplier Contract Management course. Users now should be able to:

- Understand the End-to-End Process for Departmental Supplier Contract Management
- Overview of Group Multi Supplier Contracts
- Set up Purchase Order Contracts
- Relate PO contract to allocation
- Manage Contract Deliverables
- Set up Contract Releases
- Understand Document Management



## Module 5: Course Summary

### Additional Training and Job Aids

Users also have the following resources available:

#### **User Productivity Kits**

- Approve Supplier Contract Document
- Author a Contract Document
- Create Procurement Contract and Relate to GMS
- Negotiate Supplier Contract Document
- Execute Supplier Contract Document
- Amend Supplier Contract Document
- Manage Supplier Contract Standard

#### **Job Aids**

- N/A

For additional Information, be sure to visit:

- [Miamiidade.gov/informs](http://Miamiidade.gov/informs)



## Module 5: Course Summary

### Key Terms

The following key terms are used in this course:



Term	Definition
<b>Agreements</b>	Agreements, also called deliverables, provide a mechanism to define and manage internal and external agreements for the contract.
<b>Amendment</b>	An amendment is a formal or official change made Supplier Contract.
<b>Collaboration</b>	An optional function used when creating contract documents to share and track edits to documents across internal and external collaborators.
<b>Collaborators</b>	Internal or external users, other than the primary owner of the contract, who can review or change contract documents. Collaborators can be added or deleted by document owners at any time.
<b>Contract Description</b>	Brief detail regarding the abouts of the contract.
<b>Contract Document</b>	A textual document the user can associate with a transactional purchasing contract, solicitation or a Purchase Order. Contract Documents are signed agreements that bind buyers and suppliers to specific terms and conditions.
<b>Contract ID</b>	An Assigned ID for each contract to improve traceability and unique to each contract.
<b>Contract Style</b>	Purchase Order, Sourcing and Ad-hoc are examples of Contract Style
<b>Digital Signatures</b>	Cryptographically-based signature assurance schemes that are tied to users by a digital identity certificate. INFORMS Supplier Contract Management supports the ability to lock down the Microsoft Word version of a contract and prepare an equivalent and separate PDF file that the system uses to capture signatures only. The users can capture signatures at any time.
<b>Invoice</b>	Is a commercial document that itemizes and records a transaction between a buyer and a seller.



## Module 5: Course Summary

### Key Terms

The following key terms are used in this course:



Term	Definition
<b>Supplier</b>	Organizations that are actively doing business or have done business in the past with the County, or otherwise receiving payments from the County. Supplier data is used in the following transactions: Sourcing Opportunities (RFPs, RFQs, etc.), contracts, requisition, purchase order entry, receiving/returning goods, voucher entry, payments for goods/services purchased.
<b>Supplier ID</b>	An Assigned ID for each Supplier for traceability and unique to each supplier
<b>Threshold</b>	A limit at a specified amount in the contract that could trigger an alert or notification
<b>Transactional Purchasing Contract</b>	System-entered contract data against which the user can reference and enforce contractual agreements, such as contracted items, quantities, and prices on procurement transactions. This type of contract is created and maintained within the Purchasing or Supplier Contract Management modules.