



Miami-Dade County

Import a Document Job Aid

Version 1.0

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PURPOSE AND DESCRIPTION

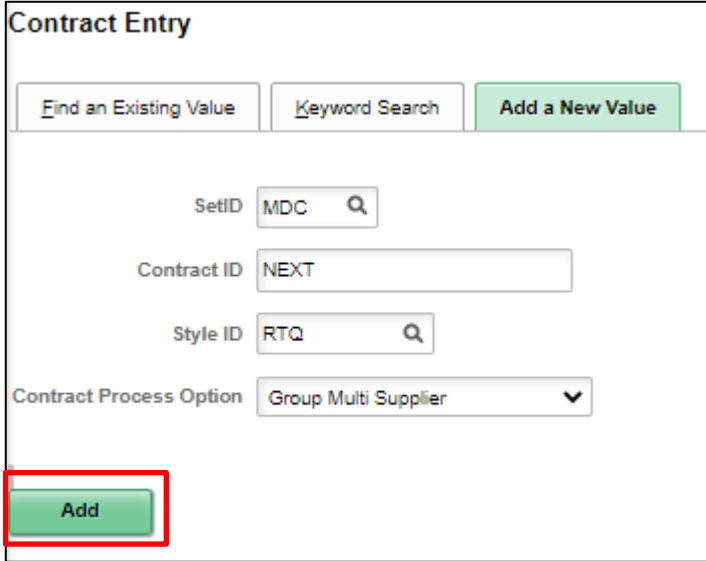
Purpose

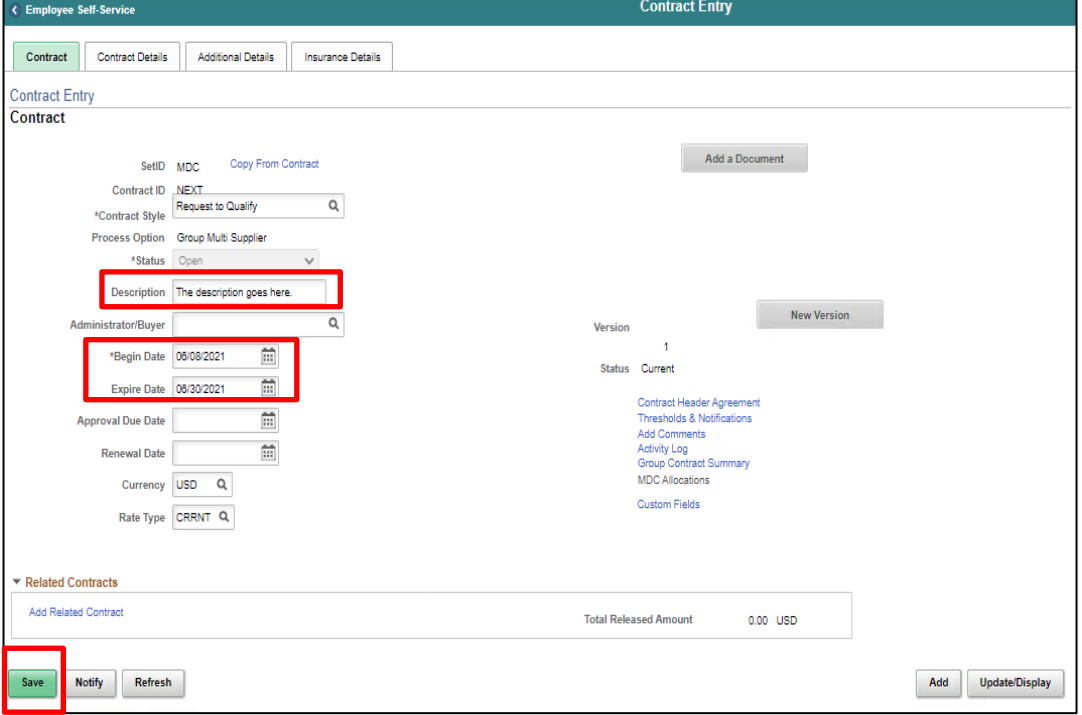
This document explains the key activities involved in Importing a Document

Description

A user can Import a Sourcing Contract document with all clauses, terms, and conditions. The document management import allows users to attach the pdf.

ACTIVITY 1: IMPORT A DOCUMENT

Step	Description
1	Navigate to Contract Entry Search page: Finance/Supply Chain Tile > Supply Chain Operations Tile > Supplier Contracts Center Tile > Contract Entry
Note: If importing a document on an existing contract you, skip 2-9	
2	Select the Contract Process Option field and input in ' Group Multi Supplier '.
3	Select the Contract Style field lookup and input in the desired value.
4	Select the Add button.
	

Step	Description
5 6 7 8	Verify that today's date has defaulted in the Begin Date field. Select the desired Expire Date in the Expire Date field. Input the desired information in the Description field. Select Save .
	
9	Select the Add a Document button on Contract Header Page.

Step	Description
10	Select the desired document type from the Document Type list.
11	Enter the desired information in the Description field if needed.
12	Select Import Option .
13	Select Current Contract/Document .
14	Input 1 in the Version Field .
15	Select Execute in the Status list.
16	Enter the desired information in the Status Date .
17	Select the Upload button.

Import Document

SetID: MDC Contract ID: GRP0000050

Supplier: Group Contract Multiple Supplier

*Document Type: General Contract Document

Sponsor: [Search]

*Administrator: MD_SC_CTL_CONTRACT_ADMIN MD_SC_CTL_CONTRACT_ADMIN

Department: [Search]

Cycle Start Date: 06/10/2021 Cycle Due Date: 07/31/2021

*Description: The description goes here

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.)

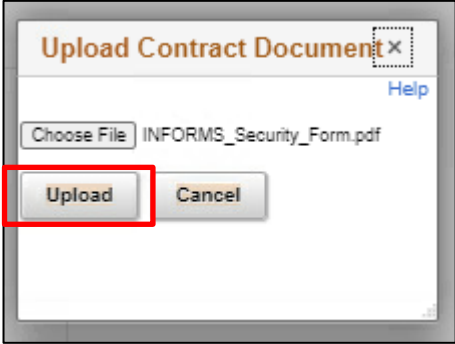
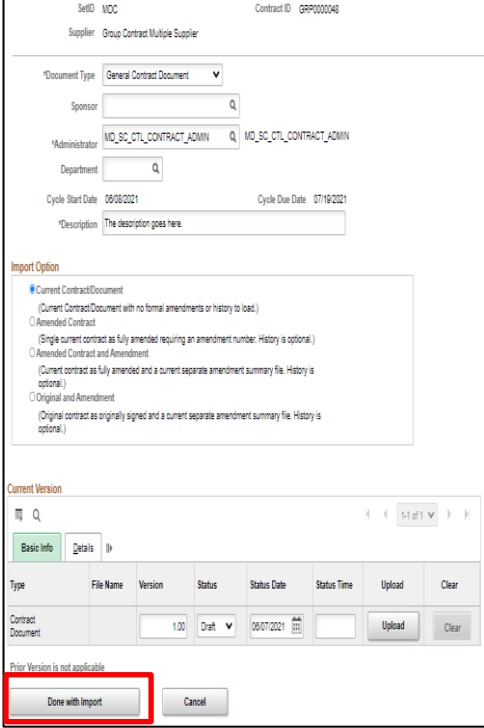
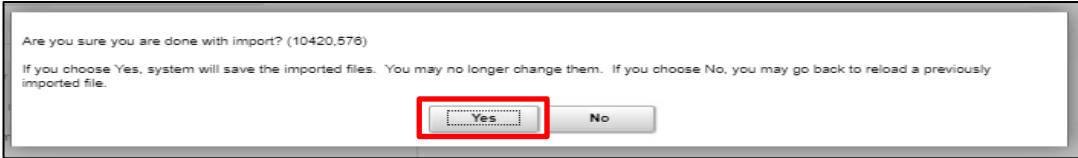
Current Version

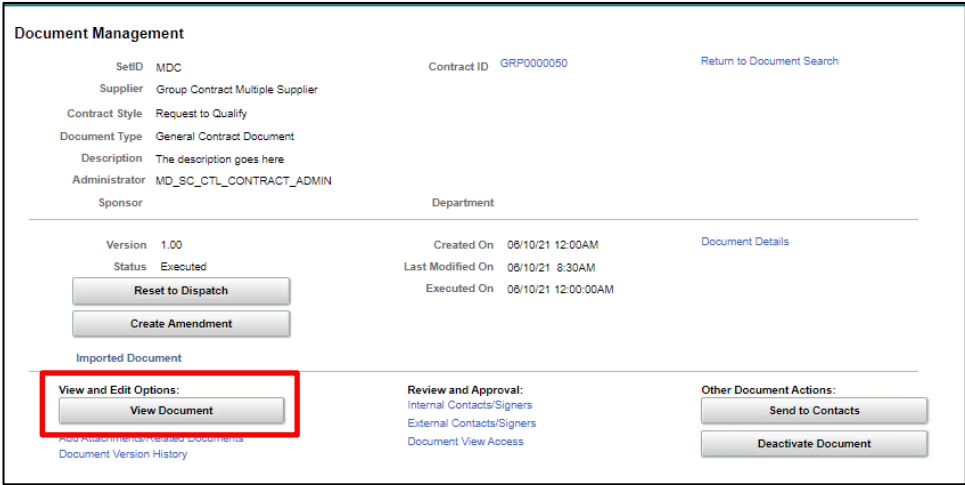
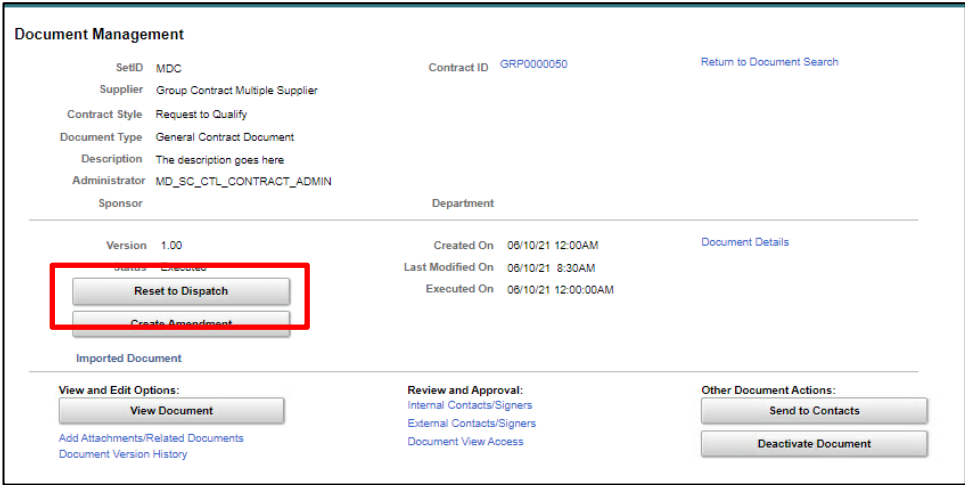
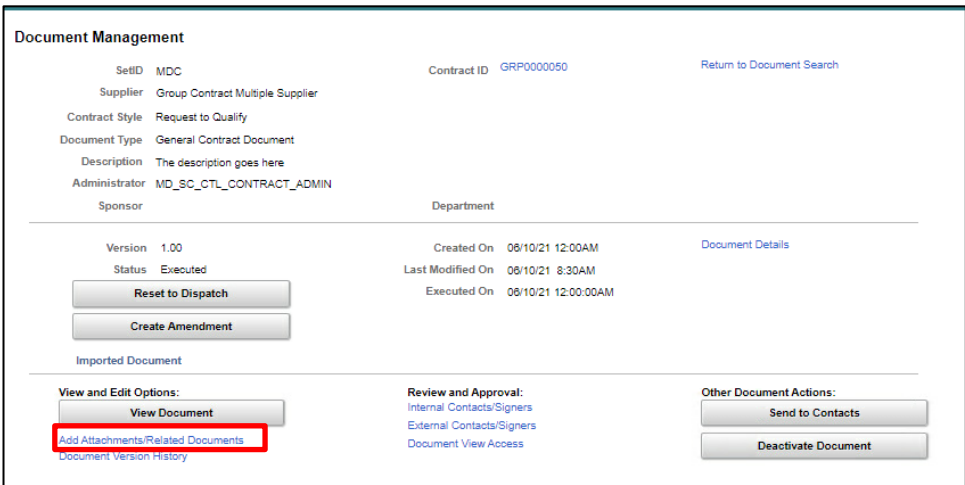
Basic Info Details

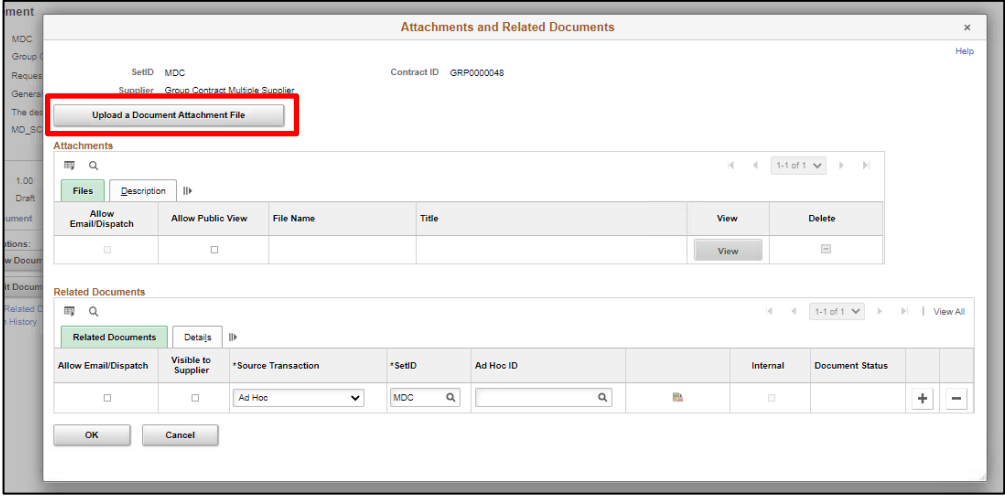
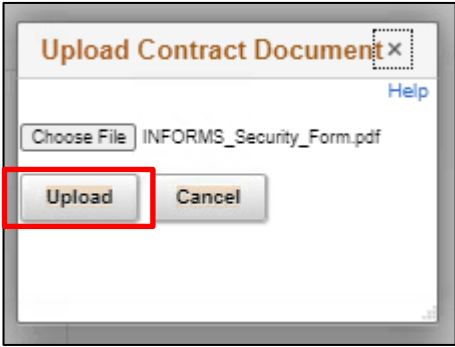
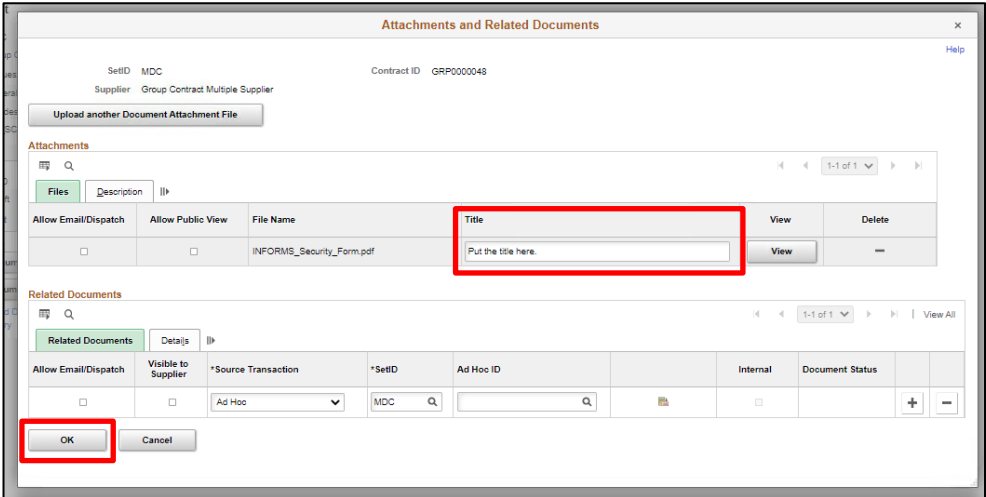
Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document		1	Execut	06/10/2021		Upload	Clear

Prior Version is not applicable

Done with Import Cancel

Step	Description
18	<p>Select the desired file then select the Upload button.</p> 
19	<p>Select Done with Import.</p> 
20	<p>Select Yes when prompted 'Are you sure you are done with Import?'</p> 

Step	Description
21	<p>Select View Document to view the document.</p>  <p>The screenshot shows the 'Document Management' page for Contract ID GRP0000050. It includes fields for SetID (MDC), Supplier (Group Contract Multiple Supplier), Contract Style (Request to Qualify), Document Type (General Contract Document), Description (The description goes here), Administrator (MD_SC_CTL_CONTRACT_ADMIN), Sponsor, and Department. Below these are buttons for 'Reset to Dispatch' and 'Create Amendment'. The 'View and Edit Options' section contains the 'View Document' button, which is highlighted with a red box. Other sections include 'Review and Approval' with links for Internal/External Contacts/Signers and Document View Access, and 'Other Document Actions' with 'Send to Contacts' and 'Deactivate Document' buttons.</p>
22	<p>Select Reset to Dispatch.</p>  <p>This screenshot is identical to the one for Step 21, but the 'Reset to Dispatch' button is highlighted with a red box instead of the 'View Document' button.</p>
23	<p>Select the Add Attachments/Related Documents link.</p>  <p>This screenshot is identical to the previous ones, but the 'Add Attachments/Related Documents' link under the 'View and Edit Options' section is highlighted with a red box.</p>

Step	Description
24	<p>Select Upload a Document Attachment.</p> 
25	<p>Select the desired file then select the Upload button.</p> 
26 27	<p>Input the desired information into the Title field. Select Okay.</p> 

Step	Description
28	<p>Select <u>Execute Contract</u>.</p> <div><p>Document Management</p><div><div>SetID: MDC</div><div>Contract ID: GRP0000050</div><div>Return to Document Search</div></div><div><div>Supplier: Group Contract Multiple Supplier</div><div>Contract Style: Request to Qualify</div><div>Document Type: General Contract Document</div><div>Description: The description goes here</div><div>Administrator: MD_SC_CTL_CONTRACT_ADMIN</div><div>Sponsor: </div><div>Department: </div></div><div><div>Version: 1.00</div><div>Created On: 06/10/21 12:00AM</div><div>Document Details</div></div><div><div>Status: Dispatched</div><div>Last Modified On: 06/10/21 8:35AM</div></div><div><div>Redispatch</div><div>Execute Contract</div></div><div><div>Imported Document</div></div><div><div>View and Edit Options:</div><div>View Document</div><div>Edit Document</div><div>Modify Attachments/Related Documents</div><div>Document Version History</div></div><div><div>Review and Approval:</div><div>Internal Contacts/Signers</div><div>External Contacts/Signers</div><div>Document View Access</div></div><div><div>Other Document Actions:</div><div>Send to Contacts</div><div>Recreate Document</div><div>Prepare and Route for e-Signature</div><div>Deactivate Document</div></div></div>