



# SCM MOU Guide

Version 19.05-01

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

For the full instructions and troubleshooting guide for SCM Creating Contracts and Amendments please refer to the [Electronic Contracting](#) web page.



# Phase 1: Complete the Transactional Contract Document

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



## 1. Create the Transactional Document

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

## 2. Complete the Header Requirements

Enter/Look up the **Contract Administrator's User ID**  
Enter/Look up the **Vendor as the State of Indiana (000022460)**

Begin Date defaults to Current Date - Needs Updated

Enter/Adjust **Begin Date**

Enter **Expire Date**

Use Agency BU in Front - This helps searches

Enter **Description**

Enter the **Maximum Amount as .001** (if nothing is to be encumbered)

## 3. PO Order Contract Options

Click **PO Defaults** link  
Enter/Verify **Business Unit**  
Enter/Look up **Ship To**  
Enter/Look up **Dept** (for routing purposes)  
Click **OK**

## 4. Enter the Line Items and Charfields

### Contract Category

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



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

Click on the **Tier 2 Details** tab  
Select **Tier 2 Type: None**  
Click on the **Contract** tab

## 6. Save

Note the **Contract ID number**

# Phase 2: Create the Text Contract Document

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



## 1. Initiate the Text Contract Document

Click **Add a Document**

## 2. Define the Document Type

Select **Document Type SOI\_MOU2**

Edit **Description** (if needed)

Verify/Update **Administrator**

Enter/Look Up **Sponsor** (if needed)

Verify/Update **Department**

Select **Requisition Type Memo of Understanding**

Click **Create Document**

## 3. Create the Text Contract Document

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

Click **Next**

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

Click **Finish**

### Fixing Wizard Questions

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



## 4. Review/Edit the Text Contract Document

Click **Edit Document**

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

Select **Save As**

Do not rename the file - Remember where you saved

Select the location to save the file

Click **Save**

Click **Open**

Revise “**State of Indiana**” in the header to the agency with whom the MOU is being created

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

### Updating the Text Contract Document

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



Revise **“State of Indiana”** in the signature block to be the name of the Agency with whom the MOU is being created

Accept/Reject all changes as appropriate

Click **Save**

Click **Check in**

Click **OK**

Click **Browse**

Select the file to be uploaded

Click **Upload**

In Witness Whereof, STATE OF INDIANA and the Indiana Department of Administration through their duly authorized representatives, entered into this Memorandum. The parties, having read and understood the foregoing terms of this Memorandum, do by their respective signatures dated below agree to the terms thereof.

<b>STATE OF INDIANA</b>	Indiana Department of Administration
By:	By:
Title:	Title:
Date:	Date:

## 5. Add Supplemental Documents

## 6. Internal Collaboration

Click Internal Contacts/Signers, Collaboration Settings tab

Enter **User ID, Security**, click **OK**

Click **Route Internally**

Verify, provide instructions, click **Route Internally**

Review/Accept **Tracked Changes**

Click **Finalize Collaboration**

Once clicked, cannot remove collaborator from process

Ensure there are no visible tracked changes on final document

### Collaboration Role

Collaborator = View Access

Edit/Check in = Edit Access

Edit option must have security set-up prior to selection.

Note that the actual signature field(s) which appear in the document are determined by the Collaboration Settings.

*User	Description	Collaborator	Edit/Check in	Collaboration Status	Collaborated
[User ID]	[Description]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Initial	

OK Cancel

## External Signer

There is no External Signer since both are State agencies



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

### Set-up Internal Contacts/Signers:

Click **Internal Contacts/Signers**, Signing Settings tab

Enter/Look up the User ID for the Internal Signer from both agencies

Select **Required to Sign Document** and **Visible Signer** checkboxes for both Internal Signers

Enter the **Sign Order** for both Internal Signers

Enter the **Signing Title** for both Internal Signers

Click **OK**

Confirm with the intended signers that they have completed the Internal Signer training, have access and are authorized to sign on behalf of the Agency.

If multiple Internal Signers, must have a Sign Order

*User	Required to Sign Document	Visible Signer	Sign Order	Signing Title
T004326	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Director of Training and Te
J235664	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	Director

OK Cancel

## 8. Prepare Document for Signing

Click **Prepare Document for Signing**

Validate Internal Signers are correct

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

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

## 9. Save the Document

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

Select **Save As**

Do not rename the file - Remember where you saved

Select the location to save the file

Click **Save**

Open the document to review

Close the PDF when the review is complete

## 10. Upload the Prepared Document

Click **Upload Prepared Document**

Click **Browse** to find the PDF

Select the file to be uploaded

Click **Upload**

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

Verify list of signers

Click **Route for Internal Signature**

Enter **Comments/Instructions** for both signers

Click **OK**

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

## 12. Document Completion of Contract Clearance Checks

Click **Clearance Check**

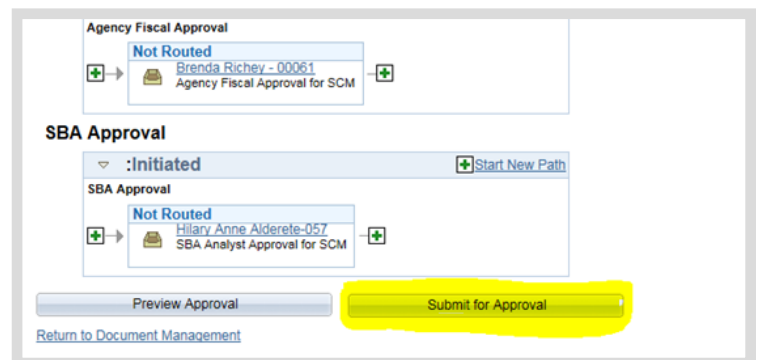
For agreements between State agencies, select Clearance Check Not Required and enter a corresponding comment.

## 13. Send for SCM Contract Document Approvals (Workflow)

It will only route to the Agency Fiscal and State Budget Agency approvers

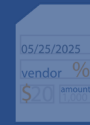
Click **Preview Approval** to review the Workflow Approval

Click **Submit for Approval** if correct



# Phase 3: Execute the SCM Contract Document

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



## 1. Dispatch

Click **Dispatch**

Do not make  
any changes  
to the Dispatch  
page

Click **OK**

## 2. Execute the SCM Contract Document

Click **Execute Contract**

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

## 3. Update the Transactional Contract Document status to Approved

## 4. Click Save