

QUICK REFERENCE GUIDE

AD Hoc Documents

April 19, 2016

Create Ad Hoc Document

NAVIGATION: *Financials Supply Chain Access, Supplier Contracts, Create Contracts and Documents, Document Management*

1. Select Source Transaction of Ad Hoc
2. Set ID is SHARE
3. Select the Document Type
4. Leave Ad Hoc ID as NEXT (System will assign the next number)
5. Enter a Description of the document
6. Click Add a Document button
7. Answer Wizard Questions
8. Click Finish
9. Click OK
10. Click Create Document button
11. Answer Wizard Questions (if applicable)
12. Click the Finish button and a Document is assigned an ID number

Create Ad Hoc Document for Sourcing Event

NAVIGATION: *Financials Supply Chain Access, Supplier Contracts, Create Contracts and Documents, Document Management*

1. Select Source Transaction of Ad Hoc
2. Set ID is SHARE
3. Select the Document Type
4. Leave Ad Hoc ID as NEXT (System will assign the next number)
5. Enter a Description of the document
6. Click Add a Document button
7. Answer Wizard Questions
8. Click Finish
9. Click OK
10. Click Create Document button
11. Answer Wizard Questions (if applicable)
12. Click the Finish button and a Document is assigned an ID number
13. Click the Edit Document button (another window tab will open)
14. Open the MSWord Document
15. Make edits and adjustments to Word document.

16. Save document to your designated folder on your computer as a **PDF** document
17. Attach to Event

Edit a Document

NAVIGATION: *Financials Supply Chain Access, Supplier Contracts, Create Contracts and Documents, Document Management*

1. Enter Search Criteria (Contract User ID will default)
2. Click Search Button
3. Click the Document ID Link of the Document you are searching for
4. Click the Edit Document Button (another window tab will open)
5. Open MSWord Document
6. Make edits and adjustments to Word document
7. Save document to your desktop (or personal file)
8. Optional – Save as PDF document if attaching to a Sourcing Event (File name must be less than 65 characters.)

Uploading a Document

NAVIGATION: *Financials Supply Chain Access, Supplier Contracts, Create Contracts and Documents, Document Management*

1. Go to Document Management Windows Tab
2. Click Check In Document button
3. Select Major or Minor Version
4. Enter Comments regarding changes made to document
5. Click OK
6. Browse for document saved on desktop (or personal file)
7. Select file
8. Click Upload button

Find a Document

NAVIGATION: *Financials Supply Chain Access, Supplier Contracts, Create Contracts and Documents, Document Management*

1. Enter Source Transaction
2. SetID is SHARE
3. Click **Find an Existing Document** link
4. Enter Contract ID
5. Click Search Button
6. Click the Document ID Link of the Document you are searching for
7. Create Document page opens to review

View a Document

NAVIGATION: *Financials Supply Chain Access, Supplier Contracts, Create Contracts and Documents, Document Management*

1. Enter Search Criteria (Contract User ID will default)
2. Click Search Button
3. Click the Document ID Link of the Document you are searching for
4. Click the View Document Button (another window tab will open)
5. Close MSWord Document after viewing

Document Modification Summary

NAVIGATION: *Financials Supply Chain Access, Supplier Contracts, Create Contracts and Documents, Document Management*

1. Enter Search Criteria(Contract User ID will default)
2. Click Search Button
3. Click the Document ID Link of the Document you are searching for
4. Click Document Modification Summary Link
5. View New, Changed or Deleted Clauses from the last checked in versus the last created or executed
6. Click Return to Document Link to return to Document page