

## QUICK REFERENCE GUIDE

### *Supplier Contracts Updates: P/T Ad Hoc Document Types and Electronic Document Signatures*

December 16, 2015

## Updates to P/T Ad Hoc Document Types and Electronic Signatures

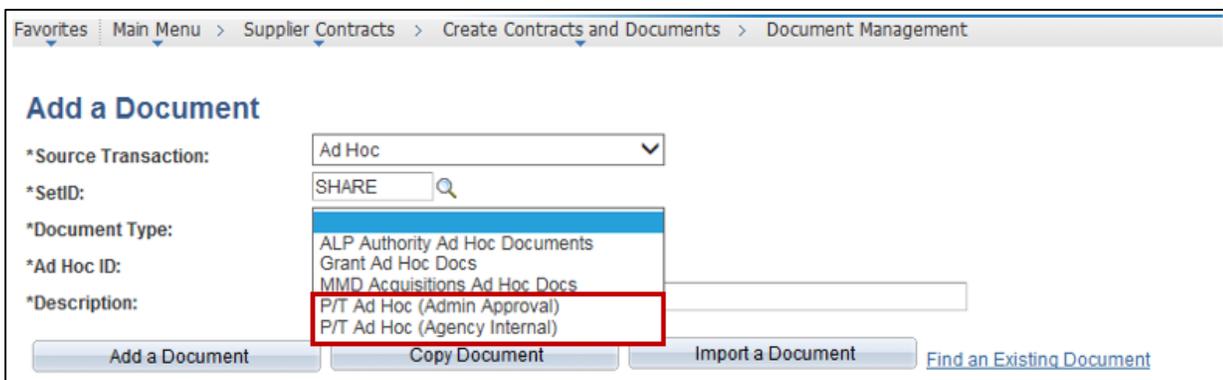
Two updates have been made related to the Electronic Signatures for P/T (Professional/Technical) Ad Hoc Documents.

1. There are now two P/T Ad Hoc document types:
  - The “P/T Ad Hoc (Agency Internal)” contains documents that only require agency signature(s).
  - The “P/T Ad Hoc (Admin Approval)” document type contains documents that require agency signature(s) as well as an Admin P/T Staff signatures.
2. P/T Ad Hoc documents that require signature from Admin P/T staff will be routed to all Admin signers via role rather than User ID.

More detail regarding the updates is provided below.

### Update 1: There Are Now Two P/T Ad Hoc Document Types

The existing P/T Ad Hoc documents have been re-organized so that certain P/T Ad Hoc documents can be routed for signature using a signature role versus routing directly to specific users. There are now two P/T Document Types:



1. The “P/T Ad Hoc (Agency Internal)” Document Type contains documents that only require agency signature(s) including:
  - 16A/16C Violation Form
  - Agency Specific
  - Evaluation Team Member Agreement
  - MMD P/T Contract Amendment Cover Sheet

- MN.IT Work Order Amendment Cover Sheet
- P/T Work Order Amendment Cover Sheet
- Single Source Request Form

**Note:** This Document Type was previously called P/T Ad Hoc Docs.

2. The “P/T Ad Hoc (Admin Approval)” Document Type contains documents that require agency signature(s) and Admin P/T Staff signatures including:
  - Annual Plan Memo
  - Annual Plan Amendment
  - Request for Emergency Authorization
  - Certification Form

**Update 2: P/T Ad Hoc documents that require signature from Admin P/T Staff can be routed to all Admin Signers via Role Rather than User ID**

In order to provide flexibility and limit cases where a specific user is not available to sign a routed Ad Hoc document, documents created using the new P/T Ad Hoc (Admin Approval) Document Type can be routed for signature via role (like contract documents).

Also, the new P/T Ad Hoc (Admin Approval) Document Type is set up with default signature steps described below.

Favorites | Main Menu > Supplier Contracts > Create Contracts and Documents > Document Management

### Add a Document

\*Source Transaction: Ad Hoc

\*SetID: SHARE

\*Document Type: P/T Ad Hoc (Admin Approval)

\*Ad Hoc ID: NEXT

\*Description: Test Ad Hoc Document

[Add a Document](#) [Copy Document](#) [Import a Document](#) [Find an Existing Document](#)

On the *Add a Document* page, complete the following:

1. Select the “P/T Ad Hoc (Admin Approval)” *Document Type*.
2. Optionally, enter an *Ad Hoc ID* or leave the value “NEXT” and the system will assign next available value.
3. Enter a *Description*.

4. Click the **Add a Document** button. The *Configurator Selection Wizard* page displays.

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### Configurator Selection Wizard

SetID: SHARE  
Wizard ID: P/T AD HOC ADMIN APPROVAL      Description: P/T Ad Hoc Admin Approval

Question Groups First 1 of 1

Question Group: P/T AD HOC ADMIN APPROVAL           

Questions

**^\*Please select the applicable document from the list**

- Annual Plan Amendment
- Annual Plan Memo
- Certification Form
- Request for Emergency Authoriz

**\* Required Question**  
**^\* Navigational Question**

5. Select the applicable document from the list of available documents:

- Annual Plan Memo
- Annual Plan Amendment
- Request for Emergency Authorization
- Certification Form

6. Click the **Finish** button after selecting the document.

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## Create Document

Source: Ad Hoc [Return to Document Search](#)  
 SetID: SHARE Ad Hoc ID: ADH000000001205  
 \*Document Type:    
 Configurator ID:  MMD P/T Annual Plan Memo  
  
 \*Description:   
 Additional Description:   


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 \*Administrator:  Erik Fernstrom  
 Sponsor:    
 Financial Department ID:    
 \*Begin Date:  Expire Date:    


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 Agency Reference Field 1:   
 Agency Reference Field 2:   


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 Use Wizard Responses from Document: (<Select Document>)  
  [Internal Contacts/Signers](#)  
 [Document View Access](#)

7. Click the **Create Document** button. The *Wizard Execute Document Creation* page displays.

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### Wizard Execute - Document Creation

Wizard ID: P/T AD HOC DOCS      Description: MMD P/T Ad Hoc Document Wizard

**Question Groups** First 1 of 1

Question Group: SIGNATURES Previous Finish

Group Instructions: Please answer the following question:

**Questions**

^\*Are you collecting signatures electronically? Yes

Previous Finish

\* Required Question Save for Later

^\*Navigational Question

Cancel

8. Select **"Yes"** to the question "Are you collecting signatures electronically".
9. Click the **Finish** button.

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### Document Management

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SetID:	SHARE	Ad Hoc ID:	ADH000000001205
Document Type:	P/T Ad Hoc Admin Approval)		
Description:	Test Ad Hoc Document		
Administrator:	Erik Fernstrom		
Sponsor:		Financial Department ID:	
Begin Date:	12/14/2015	Expire Date:	

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Version:	0.00	Created On:	12/14/15 7:37PM	<a href="#">Document Details</a>
Status:	Draft			Signature Status: New
<input type="button" value="Complete Document"/>		Last Modified On:	12/14/15 7:34PM	

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<b>View and Edit Options:</b>	<b>Review and Approval:</b>	<b>Other Document Actions:</b>
<input type="button" value="View Document"/>	<input type="button" value="Route Internally"/>	<input type="button" value="Send to Contacts"/>
<input type="button" value="Edit Document"/>	<a href="#">Internal Contacts</a>	<input type="button" value="Refresh Document"/>
<a href="#">Add Attachments/Related Documents</a>	<a href="#">Document View Access</a>	<input type="button" value="Recreate Document"/>
<a href="#">Document Modification Summary</a>	<a href="#">Electronic Signature Setup</a>	<input type="button" value="Compare Documents"/>
<a href="#">Document Version History</a>	<a href="#">Electronic Signature Details</a>	<input type="button" value="Deactivate Document"/>
	<a href="#">Review Contract</a>	<a href="#">Generation Log</a>

- The document is created. The only change to the document compared to other Ad Hoc documents is on the *Electronic Signature Setup* page.

**Note:** Before the document can be routed for signatures, it must be edited.

10. Before routing for signatures, ensure that the document is:

- Edited and completed in terms of document content
- Checked back in
- Ready for signatures

11. Once the document is ready to be routed for signatures, click the **Electronic Signature Setup** link.

SetID: SHARE Ad Hoc ID: ADH000000001205 Version: 0.00 Amendment: 0

*Sign Order	*Type	*Type ID	*Position Title	Sign Status	Required Flag
1	U		Agency Signer	Waiting to be Routed	N
2	R	M_FS_WF_SC_DOC_SIGNER_03	Admin Signer	Waiting to be Routed	N

Buttons: Validate Signer Data, Route For Electronic Signature, Cancel Signature Process

[Return to Main Document Page](#)

**Note:** All documents that are created by using the new P/T Ad Hoc (Admin Approval) Document Type have default signatures already setup.

12. The first signature step is for the agency signer. In the **Type ID** field, enter or select the User ID for the agency user that need to sign the document.

13. The second signature step is for the Admin P/T Staff approval. The following applies:

- The role that defaults is assigned to all authorized document signers at Admin for P/T documents.
- When the document is routed in this step, all Admin users with the M\_FS\_WF\_SC\_DOC\_SIGNER\_03 role will be notified that the document must be signed.
- Only one Admin signature is required so the signature process is completed once one Admin user signs the document.

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### Electronic Signature Setup

SetID: SHARE Ad Hoc ID: ADH000000001205 Version: 0.00 Amendment: 0

Internal Signer(s) Find First 1-2 of 2 Last

*Sign Order	*Type	*Type ID	*Position Title	Sign Status	Required Flag
1	U	FIFER02	Agency Signer	Waiting to be Routed	N
2	R	M_FS_WF_SC_DOC_SIGNER_03	Admin Signer	Waiting to be Routed	N

Validate Signer Data

Route For Electronic Signature

Cancel Signature Process

[Return to Main Document Page](#)

14. Before routing the document, you can make some changes to the Electronic Signature Setup:

- Users can be added / deleted as needed.
- The Admin signature step can be removed and replaced with a specific user in the Admin department (only use this option if you have previously worked with someone specific in the Admin department on the document).

15. To route the document for signature, click the **Validate Signature Data** button.

16. Click the **Route for Electronic Signature** button.

### Error Handling

While trying to edit an Ad Hoc document, you may receive an error Message indicating that “Field is Required. M\_CS\_INT\_SIGN\_M\_CS\_APPOVER”:

Document Management [Return to Document Search](#)

SetID: SHARE Ad Hoc ID: ADH000000001205

Document Type: P/T Ad Hoc Admin Approval

Description: Test Ad Hoc Document

Administrator: Erik Fernstrom

Sponsor: Financial Department ID:

Begin Date: 12/14/2015 Expire Date:

Amendment: 0 Created On: Field is Required: M\_CS\_INT\_SIGN - M\_CS\_APPOVER (124,64)

Version: 0.00

Status: Draft Last Modified:

Complete Document

Message

OK

If you receive this error:

1. Navigate to the *Electronic Signature Setup* page.
2. Ensure that the *Type ID* field is populated for all signature rows.