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# PeopleSoft FSCM 9.2: PeopleSoft Supplier Contract Management

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# Contents

- Preface: Preface.....xvii**
- Understanding the PeopleSoft Online Help and PeopleBooks..... xvii
- Hosted PeopleSoft Online Help..... xvii
- Locally Installed Help..... xvii
- Downloadable PeopleBook PDF Files..... xvii
- Common Help Documentation..... xvii
- Field and Control Definitions..... xviii
- Typographical Conventions..... xviii
- ISO Country and Currency Codes..... xviii
- Region and Industry Identifiers..... xix
- Translations and Embedded Help..... xix
- Using and Managing the PeopleSoft Online Help..... xx
- PeopleSoft FSCM Related Links..... xx
- Contact Us..... xx
- Follow Us..... xx
- Chapter 1: Getting Started with PeopleSoft Supplier Contract Management.....23**
- PeopleSoft Supplier Contract Management Overview..... 23
- PeopleSoft Supplier Contract Management Integrations..... 24
- PeopleSoft Supplier Contract Management Implementation..... 25
- Related Product Documentation..... 26
- Chapter 2: Understanding PeopleSoft Supplier Contract Management..... 27**
- PeopleSoft Supplier Contract Management..... 27
- Common Elements Used With PeopleSoft Contract Management..... 28
- Supplier Contract Components..... 31
- Supplier Contract Components..... 32
- Requests for Proposals..... 34
- Transactional Purchasing Contracts..... 34
- Transactional Purchase Orders..... 34
- Requisition Documents..... 35
- Agreements..... 35
- Source Transactions for Authoring Purposes..... 36
- Document Library..... 36
- Document Life Cycle..... 39
- Syndication..... 44
- Supplier Contract Management Integration with Other PeopleSoft Applications..... 45
- PeopleSoft Purchasing Integration..... 45
- PeopleSoft Strategic Sourcing Integration..... 47
- PeopleSoft eProcurement Integration..... 48
- Microsoft Word Integration with PeopleSoft Supplier Contract Management..... 48
- Chapter 3: Setting Up PeopleSoft Supplier Contract Management.....51**
- Understanding PeopleSoft Supplier Contract Management Setup..... 51
- Setting Up Servers and Directories..... 53
- Understanding Server and Directory Setup..... 53
- Overriding SFTP Attachment Servers..... 54
- Setting Up Two SFTP Attachment Servers..... 55
- Setting Up PeopleSoft Integration Broker for Microsoft Word..... 56

Pages Used to Set Up PeopleSoft Integration Broker and Microsoft Word.....	56
Understanding PeopleSoft Integration Broker Setup for Microsoft Word.....	57
Setting Up Integration Broker to Use the Microsoft Word - Research Task Pane.....	59
Setting Up a Clause URL to Appear in the Research Pane.....	60
Setting Up Document Comparison and Rendering.....	61
Understanding Document Comparison and Rendering.....	61
Setting Up Document Comparisons and Rendering.....	62
Installing and Configuring Microsoft Word Components on Devices.....	64
Installing Web Services for Microsoft Word.....	64
Setting Up Installation Options for PeopleSoft Supplier Contract Management.....	66
Page Used to Set Up Installation Options for PeopleSoft Supplier Contract Management.....	66
Installation Options - Supplier Contract Management Page.....	66
Setting Up Document Templates and Styles.....	88
Page Used to Set up Document Templates and Styles.....	89
Understanding Document Templates.....	89
Define Document Templates and Styles Page.....	89
Setting Up Document Formats and Options.....	92
Page Used to Set Up Document Formats and Options.....	92
Document Format and Options Page.....	92
Setting Up User-Defined Fields.....	98
Page Used to Set Up User-Defined Fields.....	98
Understanding User-Defined Fields.....	98
User Defined Fields Page.....	98
Setting Up Automatic Numbering.....	102
Page Used to Set Up Automatic Numbering Specifications.....	102
Understanding Automatic Numbering.....	102
Auto Numbering Page.....	103
Using the Data Migration Workbench for PeopleSoft Supplier Contract Management.....	106
<b>Chapter 4: Setting Up Supplier Contract Management Security.....</b>	<b>111</b>
Understanding Supplier Contract Sample Permission Lists, Roles, and Users.....	111
Sample Users, Roles, and Permission Lists.....	111
Typical Users of PeopleSoft Supplier Contract Management.....	112
Managing Document Access.....	114
Pages Used to Manage Document Access.....	114
Understanding User Preferences.....	115
Comparing the User Preferences - Supplier Contract Management Page with the Authorized Document Access Page.....	115
Authorized Document Access Page.....	115
Delete User Preferences Page.....	117
<b>Chapter 5: Setting Up Clauses and Sections in the Contract Library.....</b>	<b>119</b>
Understanding the Contract Library.....	119
Contract Library.....	119
Common Elements Used Within the Library and Authored Documents.....	121
Understanding Document Clauses.....	125
Clauses.....	125
Clause Status, Approval Status, and Workflow.....	126
Editing Clause Text.....	126
Bind Variables and Repeating Clauses.....	128
Table Clauses.....	129
Dependent Clauses.....	132
Alternate Clauses.....	133

Microsoft Word Templates and Clauses.....	133
Clause Imports.....	134
Clause Libraries, Groups, and Classes.....	134
Setting Up Clauses.....	135
Pages Used to Set up Clauses.....	135
Clause Definition Page.....	135
Library Definition Page.....	149
Group Definition Page.....	150
Clause Class Page.....	150
Associate to Clause Group Page.....	151
Add Bind Variables to Content Fields Page.....	152
Clause Approval Status Page.....	154
Understanding Document Sections.....	155
Setting Up Sections.....	157
Pages Used to Set Up Sections.....	157
Section Definition Page.....	157
Importing Clauses and Sections.....	166
Page Used to Import Objects.....	167
Understanding the Object Import and Creation Process.....	167
Import Clauses/Sections Page.....	173
Resolving Import Errors and Warning Messages.....	188
Creating and Reviewing a Document Configurator After Importing Objects.....	190
<b>Chapter 6: Setting Up Other Elements in the Contract Library.....</b>	<b>195</b>
Setting Up Rules.....	195
Page Used to Set Up Rules.....	195
Understanding Authored Document Rules.....	195
Rules Page.....	197
Setting Up Binds.....	202
Pages Used to Set Up Binds.....	202
Understanding Bind Variables.....	202
Source Transaction Structures Page.....	205
Wizard Bind Prompt Tables Page.....	207
Bind Mappings Page.....	208
Bind Definition Page.....	210
Setting Up Document Configurators.....	215
Pages Used to Set Up Document Configurators.....	215
Understanding Document Configurators.....	216
Understanding Document Configurator Groups and Types.....	218
Document Configurator Group Definition Page.....	219
Document Configurator Type Definition Page.....	219
Document Configurator Definition Page.....	219
Select and Add Clauses or Sections to Document Configurator Page.....	231
Insert a Content Row Page.....	233
Associate to Configurator Groups Page.....	235
Setting Up Document Types.....	235
Page Used to Set Up Document Types.....	235
Understanding Document Types.....	235
Document Type Page.....	236
<b>Chapter 7: Setting Up Wizards.....</b>	<b>249</b>
Understanding Wizards.....	249
Wizards.....	249

Document Creation Wizards.....	249
Steps Used to Create and Use Wizards.....	251
Configurator Selection Wizards.....	254
Wizard Bind Variables.....	254
Question Groups.....	255
Question Navigation.....	256
Setting Up Question Groups for a Wizard.....	260
Pages Used to Set Up Question Groups for a Wizard.....	260
Understanding Wizard-Specific Binds in Question Groups.....	260
Question Groups Page.....	261
Question Groups Page (for configurator).....	266
Copy Question Group Page.....	268
Valid Values and Navigation Page.....	269
Associated Rules Page.....	272
Enter URL for Question Information Page.....	273
Defining Wizards.....	275
Pages Used to Define Wizards.....	275
Understanding How to Test Wizard Values.....	275
Define Wizard Page.....	275
Test-Document Creation Wizard Page.....	278
Test-Configurator Selection Wizard Page.....	279
Wizard Summary Page.....	280
Creating Documents Using Wizards.....	282
Pages Used to Create Documents Using Contract Wizards.....	282
Understanding Document Creation.....	282
Wizard Execute - Document Creation Page.....	283
Defining Binds for Wizards.....	284
Page Used to Define Binds for Wizards.....	284
Defining Binds for Wizards Using the Bind Definition Page.....	285
<b>Chapter 8: Creating Authored Documents.....</b>	<b>287</b>
Understanding Authored Documents.....	287
Common Elements Used When Creating Authored Documents.....	287
Creating Authored Documents.....	288
Pages Used to Create Authored Documents.....	288
Understanding How to Create Authored Documents.....	289
Understanding How to Copy Documents.....	289
Understanding How to Create Authored Documents from Requisition Wizards.....	290
Understanding How to Add Ad Hoc Documents linked to Requisitions.....	292
Add a Document Page.....	295
Create Document Page.....	297
Copy Document Page.....	301
Import Document Page.....	304
Creating Authored Documents for Purchasing Contracts.....	305
Pages Used to Create Purchasing Contract Authored Documents.....	305
Understanding How To Create Purchasing Contract Authored Documents.....	305
Create Document Page - Purchasing Contract.....	307
Copy Document Page.....	309
Add a Document Page - Requisition.....	309
Creating Contract Documents for Purchase Orders.....	311
Pages Used to Create Contract Documents for Purchase Orders.....	311
Understanding How to Create Contract Documents for Purchase Orders.....	311

Creating Contract Documents for Purchase Orders.....	315
Importing Documents.....	316
Pages Used to Import Documents.....	316
Understanding Document Import.....	317
Import Document Page.....	319
Importing Amended Contracts.....	325
Importing Amended Contracts and Amendments.....	328
Importing Original Contracts and Amendment Files.....	329
Importing Previous Document Versions.....	331
Change Source Transaction Page.....	333
Running Contract Release Processes for Purchasing Contracts.....	334
Pages Used to Run Contract Release Processes for Procurement Contracts.....	334
Stage Contract POs Page.....	334
PO Auto Sourcing - Objectives Page.....	335
PO Calculations - Run Controls Page.....	335
PO Creation - Create PO Page.....	335
Sourcing Workbench Page.....	335
Accessing Related Links for Supplier Contracts.....	336
Pages Used to Access Related Links for Supplier Contracts.....	336
<b>Chapter 9: Managing Contract Agreements.....</b>	<b>339</b>
Understanding Contract Agreements.....	339
Contract Agreements and Contract Compliance.....	339
Agreement Use.....	340
Agreement Management.....	340
Understanding Agreement Metrics.....	343
Metric Measurements.....	343
Metric Measurement Types.....	345
Implementing Metric Measurements with Agreements Steps.....	345
Common Elements Used When Managing Contract Agreements.....	348
Predefining Agreements.....	357
Pages Used to Predefine Agreements.....	357
Contract Agreement Definition Page.....	357
Assign Agreement Clauses Page.....	359
Agreement Notification Page.....	361
Assigning Agreements to Purchasing Contracts.....	365
Pages Used to Assign Agreements to Purchasing Contracts.....	365
Understanding Purchasing Contract Agreements.....	366
Contract Header Agreement Assignments Page.....	366
Contract Header Clause Assignments Page.....	370
Contract Header Notification Assignments Page.....	371
Contract Line Agreement Assignments Page.....	371
Contract Line Clause Assignments Page.....	372
Contract Item Line Notification Assignments Page.....	372
Contract Category Agreement Assignments Page.....	372
Contract Category Clause Assignments Page.....	373
Contract Category Notification Assignments Page.....	373
Reviewing and Updating Contract Agreement Statuses.....	373
Pages Used to Review and Update Contract Agreement Statuses.....	373
Process Notifications Page.....	374
Update Agreement Statuses Page (search).....	376
Update Agreement Statuses Page.....	379

Contract Verification Details Page.....	381
Uploading Attachments for Agreement Steps.....	383
Updating Contract Procurement History.....	383
Page Used to Update Contract Procurement History.....	383
Understanding Procurement Updates.....	383
Update Procurement Info Page.....	384
Monitoring Agreement Compliance.....	386
Pages Used to Monitor Agreement Compliance.....	386
Monitor Contract Agreements Page.....	386
Contract Agreement Status Details Page.....	388
<b>Chapter 10: Collaborating and Signing Documents.....</b>	<b>393</b>
External Users and Document Collaboration.....	393
Understanding Contract Deliverable Verification Steps.....	394
Reviewing and Collaborating on External Documents.....	395
Pages Used to Maintain External Contract Documents.....	395
Understanding External Collaboration.....	395
Document Search Page.....	396
Document Management Page.....	399
Attachments and Related Authored Documents Page.....	402
Document History Page.....	402
External Collaboration History Details Page.....	404
Send Email Page.....	404
Signing External Documents.....	406
Page Used to Sign External Documents.....	406
Understanding External Document Signatures.....	406
Signing External Document from the Document Management Page.....	408
Maintaining External Contract Deliverables.....	409
Pages Used to Maintain External Contract Deliverables.....	409
Understanding External Contract User Access.....	409
Search Deliverables Page.....	410
Review Agreement Page.....	412
Update Verifications Page.....	413
<b>Chapter 11: Setting Up and Using Contract Syndication.....</b>	<b>419</b>
Understanding Contract Syndication.....	419
Contract Syndication.....	419
Contract Syndication Steps.....	421
Contract Syndication Enterprise Integration Points.....	422
Understanding How to Load Contracts into the Parent System.....	423
Setting Up Contract Syndication.....	423
Setup Requirements.....	423
Defining Contracts for Syndication.....	426
Pages Used to Define Contracts for Syndication.....	427
Creating a Syndicated Contract.....	427
Contract Entry - Contract Page (Syndicated).....	428
Create Releases Page.....	430
Review Releases Page.....	431
Contract Item Release Details for Line Page.....	431
Contract Category Release Details for Line Page.....	433
Syndicating Supplier Contracts.....	434
Page Used to Syndicate Supplier Contracts.....	434
Contract Syndication Page.....	434



Capturing Parent Activities.....	441
Page Used to Capture Parent Activities.....	441
Understanding Activities.....	441
Parent Contract Activity Capture Page.....	443
Publishing Outbound Messages.....	445
Pages Used to Publish Outbound Messages.....	445
Understanding Outbound Messages.....	445
Publish Outbound Message Page.....	447
Supplier Contract Syndication Message Selection Criteria Page.....	448
Reviewing Contract Activities.....	449
Pages Used to Review Contract Activities.....	449
Activity Summary Inquiry Page.....	449
Activity Summary Detail Page.....	450
Reviewing Inbound Contract Messages and Exceptions.....	453
Pages Use to Review Inbound Contract Messages and Exceptions.....	453
Review Inbound Contract Exceptions Page.....	453
<b>Chapter 12: Generating Microsoft Word Documents.....</b>	<b>455</b>
Understanding Microsoft Word Document Generation.....	455
Processing Terms Used When Generating Microsoft Word Documents.....	457
Generating Microsoft Word Documents.....	458
Refreshing Microsoft Word Documents.....	463
Viewing Document Generation Logs.....	465
Page Used to View Document Generation Logs.....	465
Understanding Log Generation.....	466
Generation Log Page.....	469
<b>Chapter 13: Managing Document Life Cycles.....</b>	<b>477</b>
Understanding Document Life Cycles.....	477
Understanding Life-Cycle Statuses and Actions.....	480
Document Actions.....	480
Document Collaboration Statuses.....	494
Document Approval Statuses.....	495
Understanding the Sourcing Event (RFx) Document Process Flow.....	496
Common Elements Used When Managing Document Life Cycles.....	497
Finding Authored Documents in Supplier Contract Management.....	500
Pages Used to Find Authored Documents.....	500
Find an Existing Document Page.....	501
Keyword Search for Documents Page.....	511
Maintaining Authored Documents.....	513
Page Used to Maintain Authored Documents.....	513
Document Management Page.....	513
Refreshing and Re-creating Documents.....	523
Pages Used to Refresh and Re-create Documents.....	523
Understanding Document Refresh and Re-creation.....	523
Refresh Document Options Page.....	524
Recreate Document Options Page.....	526
Maintaining Document Details.....	528
Page Used to Maintain Document Details.....	528
Document Details Page.....	528
Creating Executive Summaries.....	529
Pages Used to Create Executive Summaries.....	529
Understanding Executive Summaries.....	529

Executive Summary Page.....	530
Viewing and Editing Documents.....	531
Pages Used to View and Edit Documents.....	531
Understanding Document Edits.....	531
Editing Documents from the Document Management Page.....	534
Check In Document Page.....	537
Viewing Documents from the Document Management Page.....	539
Canceling Document Checkout from the Document Management Page.....	539
Viewing Document Version History.....	539
Pages Used to View Document Version History.....	539
Document History Page.....	540
Attachment and Related Document History Page.....	543
PO History vs Document History Page and PO Contract Version History vs Document History Page.....	545
Dispatch History Page.....	546
Collaboration History Page.....	547
Generation History Page.....	547
Setting Up Default Document Preferences.....	548
Page Used to Set Up My Default Document Preferences.....	548
My Default Document Preferences Page.....	548
Collaborating on Documents.....	551
Pages Used to Collaborate on Documents.....	551
Understanding Document Collaboration.....	551
Internal Contacts/Collaborators Page.....	555
Route for External Collaboration Page.....	557
Modifying Collaboration Using the Document Management Page.....	559
Canceling Collaboration Using the Document Management Page.....	559
Responding to Collaboration Requests Using the Document Management Page.....	559
Finalizing Internal Collaboration Using the Document Management Page.....	561
Finalizing External Collaboration Using the Document Management Page.....	561
Viewing Document Modification Summaries.....	563
Page Used to View Document Modification Summaries.....	563
Document Modification Summary Page.....	563
Viewing and Uploading Attachments and Related Documents.....	564
Page Used to View and Upload Attachments and Related Documents.....	564
Attachments and Related Documents Page.....	564
Sending Documents to Internal and External Contacts.....	568
Pages Used to Send Documents to Internal and External Contacts.....	568
Understanding External Contacts.....	568
Internal Contacts List Page.....	569
External Contacts Page.....	572
Send to Contacts Page.....	573
Granting Document View Access.....	574
Page Used to Grant Document View Access.....	574
Document Access Page.....	574
Dispatching Documents.....	575
Pages Used to Dispatch Documents.....	575
Understanding Document Dispatch.....	575
Dispatch Page.....	575
Resetting Documents to Dispatched Using the Document Management Page.....	581
Executing Documents.....	582

Page Used to Execute Documents.....	582
Executing Documents Using the Document Management Page.....	582
Comparing Documents.....	582
Page Used to Compare Documents.....	582
Understanding Document Comparisons.....	582
Compare Documents Page.....	583
Using Document-Related Pagelets.....	584
Pages Used With Document-Related Pagelets.....	584
Deactivating and Reactivating Documents.....	585
Page Used to Deactivate and Reactivate Documents.....	585
Deactivating Documents Using Document Management Page.....	585
Reactivating Documents Using Document Management Page.....	586
<b>Chapter 14: Performing Searches in Supplier Contract Management.....</b>	<b>587</b>
Understanding Contract Library Searches.....	587
Understanding PeopleSoft Search Framework and Where-Used Searches.....	587
Understanding the Search Types Used in Supplier Contract Management Components.....	587
PeopleSoft Search Framework.....	588
Keyword Searches in the Document Management Component.....	589
Keyword Searches in the Manage Contract Library Component.....	589
Searches in the Search Content Component.....	590
Where-Used Searches.....	591
Setting Up and Building Search Indexes.....	592
Pages Used to Set Up and Build Search Indexes.....	592
Search Definition Page.....	592
Build Search Index Page.....	593
Searching for Library and Document Contents.....	595
Pages Used to Search for Library and Document Contents.....	595
Common Elements Used to Search for Library and Document Contents.....	596
Understanding the Search Content by Type Page.....	600
Search Content By Type Page (for Clauses, Document Configurators, and Sections).....	602
Search Content By Type Page (for Documents).....	603
Reviewing Document Search Results Using the Search Content By Type Page for Clause, Document Configurator, or Section Content Types.....	613
Reviewing Document Search Results Using the Search Content By Type Page for Document Content Type.....	614
Performing Where-Used Searches.....	616
Page Used to Perform Where-Used Searches.....	616
Understanding the Search for All Content Instances Page.....	616
Search for All Content Instances Page (Define Document Templates and Styles).....	616
Search for All Content Instances Page (Search Content by Type).....	618
<b>Chapter 15: Using the Supplier Contract Workbench.....</b>	<b>621</b>
Understanding the Supplier Contract Workbench.....	621
Transaction Search.....	622
Common Elements Used with the Supplier Contract Workbench.....	623
Using the Supplier Contract Workbench.....	629
Pages Used with the Supplier Contract Workbench.....	629
Supplier Contract Workbench Page.....	629
Supplier Contract Workbench Page (All Sources).....	630
Supplier Contract Workbench Page (Adhoc Documents).....	631
Supplier Contract Workbench Page (Procurement Contracts).....	633
Supplier Contract Workbench Page (Purchase Order Documents).....	634

Supplier Contract Workbench Page (Sourcing Event Documents).....	636
<b>Chapter 16: Using the Contract/Sourcing WorkCenter and Dashboard.....</b>	<b>639</b>
Understanding the Contract/Sourcing WorkCenter and Dashboard.....	639
Pagelet Setup, Maintenance, and Personalization.....	639
My Work Pagelet.....	639
Links Pagelet.....	639
Queries Pagelet.....	640
Reports and Processes Pagelet.....	640
Contract/Sourcing WorkCenter Dashboard.....	640
Example: Contract/Sourcing WorkCenter.....	640
Understanding the Contract/Sourcing WorkCenter - My Work Pagelet.....	641
Understanding the Contract/Sourcing WorkCenter - Links Pagelet.....	641
Understanding the Contract/Sourcing WorkCenter - Queries Pagelet.....	643
Understanding the Contract/Sourcing WorkCenter - Reports and Processes Pagelet.....	644
Using the Contract/Sourcing WorkCenter - Dashboard.....	645
<b>Chapter 17: Creating Reports for Library and Document Contents.....</b>	<b>647</b>
Understanding PeopleSoft Supplier Contract Management Reports.....	647
Common Elements Used When Creating Reports for Library and Document Contents.....	647
Creating Reports.....	650
Pages Used to Create Supplier Contract Management Reports.....	650
Document Status Summary Page.....	650
Document Status Detail Page.....	651
Contract Content Deviations Page.....	652
Unused Content Page.....	654
Content Usage Page.....	655
Accessing Other Procurement Contract Reports.....	655
<b>Chapter 18: Setting Up and Using Digital Signatures.....</b>	<b>657</b>
Understanding Digital Signatures.....	657
Overview.....	657
Signature Methods Used to Manage the Document Signature Lifecycle.....	657
Implementation Considerations.....	658
Methods Used to Create Signature Fields.....	659
Setting Up Digital Signatures.....	663
Setting Up Digital Signatures for the Adobe and Word Signature Methods.....	663
Setting Up Digital Signatures for the Adobe Sign Signature Method.....	666
Setting Up Digital Signatures for the DocuSign Signature Method.....	666
Pages Used to Set Up Digital Signatures for the Adobe Sign and DocuSign Signature Methods.....	667
Service Operation — General Page.....	667
Electronic Signature Account Page.....	669
Configure OAuth Page.....	670
Working with Digital Signatures.....	672
Signing Documents Using the Adobe and Word Signature Methods.....	673
Signing Documents Using the Adobe Sign and DocuSign Signature Methods.....	681
Common Pages Used to Sign Documents (All Signature Methods).....	682
Pages Used with Adobe and Word Signature Methods.....	682
Route for Internal Signatures Page.....	683
Prepare Document for Signatures Page.....	684
Pages Used with Adobe Sign and DocuSign Signature Methods.....	685
Send Document for Signing Page.....	686
Electronic Signature Polling Page.....	690

Edit Recipients Page.....	691
<b>Chapter 19: Setting Up and Using Document Approvals.....</b>	<b>693</b>
Understanding Document Approvals.....	693
Understanding PeopleSoft Supplier Contract Management Workflow.....	694
Workflow in PeopleSoft Supplier Contract Management.....	694
PeopleSoft Approval Framework Process.....	697
Approval Framework Users.....	697
Setup Steps for PeopleSoft Approval Framework.....	698
Approval Setup and Transaction Tables.....	700
Establishing Processes for Approval Framework.....	701
Pages Used to Establish Processes for Approval Framework.....	701
Approval Process Definition Page.....	701
Criteria Definition Page.....	702
Approval Path Definition Page.....	702
Approval Step Definition Page.....	702
Setting Up Approval Types.....	703
Page Used to Set Up Approval Types.....	703
Understanding Approval Types.....	703
Approval Type Page.....	704
Maintaining User List Definitions.....	706
Page Used to Maintain User List Definitions.....	706
User List Definition Page.....	706
Defining the Transaction Registry.....	707
Page Used to Define the Transaction Registry.....	707
Register Transactions Page.....	707
Defining Generic Templates.....	707
Pages Used to Define Generic Templates.....	707
Setting Up Event Escalations and Notifications.....	708
Pages Used to Set Up Event Escalations and Notifications.....	708
Understanding Event Escalations and Notifications.....	708
Defining Self-Approval Criteria.....	708
Page Used to Define Self-Approval Criteria.....	708
Criteria Definition Page.....	708
Defining User Preferences and Installation Options for Document Approvals.....	709
Pages Used to Define User Preferences and Installation Options for Document Approvals.....	709
Defining Document Approvals Using the User Preferences Page.....	709
Defining Document Approvals Using the Installation Options - Supplier Contract Management Page.....	710
Approving Clauses.....	710
Pages Used to Approve Clauses.....	710
Understanding Clause Approval.....	711
Setting Up Clause Approval Using the Installation Options- Supplier Contract Management Page.....	715
Accessing Clauses for Approval Using the Clause Definition Page.....	715
Previewing and Submitting Clauses for Approval Using the Clause Approval Status Page.....	717
Updating and Submitting Clauses for Approval Using the Clause Approval Status Page.....	718
Approving Clauses Using the Clause Definition Page.....	718
Setting Effective Dates for Clauses Using Clause Definition Page.....	720
Approving Clauses Using PeopleSoft Fluid User Interface.....	720
Pages Used to Approve Clauses in the PeopleSoft Fluid User Interface.....	720
Pending Approvals - Supplier Contract Clause (List) Page.....	721

Supplier Contract Clause Page.....	722
Approving Sections and Controlling Document Configurator Availability.....	725
Pages Used to Approve Sections and Control Document Configurator Availability.....	725
Understanding Section and Configurator Approvals.....	725
Setting Section and Configurator Preferences Using the User Preferences Page.....	726
Defining Section Approvals Using the Section Definition Page.....	726
Controlling Document Configurator Availability Using the Document Configurator Definition Page.....	727
Approving Documents.....	728
Pages Used to Approve Documents.....	728
Understanding Document Approvals.....	728
Accessing Document Approval and Review Components Using the Document Management Page.....	730
Document Approval Status Page.....	731
Submitting Documents for Approval Using the Document Approval Status Page.....	733
Approving and Reviewing Documents Using the Document Management Page.....	735
Verifying Document Approvals Using the Document Approval Status Page.....	737
Denying Approval for Documents Using the Document Approval Status Page.....	738
Inserting Ad Hoc Approvers and Reviewers Using the Document Approval Status Page.....	740
Bypassing Document Approvals Using the Document Management page.....	741
Approving Documents Using PeopleSoft Fluid User Interface.....	741
Pages Used to Approve Documents in the PeopleSoft Fluid User Interface.....	741
Pending Approvals - Supplier Contract Page (List).....	741
Supplier Contract Approval Page.....	743
Approval Line Detail Page.....	746
<b>Chapter 20: Setting Up and Creating Amendments.....</b>	<b>749</b>
Understanding Contract Document Amendments.....	749
Contract Amendments.....	749
Amendment Processing.....	753
Amendment Steps.....	759
Understanding Amendments for Imported Documents.....	760
Understanding Amendments Linked to Source Transactions.....	761
Setting Up System Values for Amendments.....	763
Pages Used to Set Up System Values for Amendments.....	763
Document Configurator Definition Page.....	763
Creating Document Amendments.....	764
Pages Used to Create Document Amendments.....	764
Create an Amended Version Page.....	764
Updating Amended Files Automatically Using the Document Management Page.....	767
<b>Chapter 21: Microsoft Word Integration with Supplier Contract Management.....</b>	<b>771</b>
Understanding Microsoft Word Integration with Supplier Contract Management.....	771
Microsoft Word Editing Access.....	773
Microsoft Word Search Considerations.....	774
File Configuration For Microsoft Word Searches Using Research Task Panes.....	774
Search Limitations.....	775
Supported Microsoft Word Settings.....	775
Format and Style Considerations in Microsoft Word.....	776
Styles and Formatting.....	776
Templates.....	777
Sample Templates.....	777
Formatting Application.....	778

Style Planning.....	779
Style Application.....	780
Microsoft Word Paragraph Styles and Outline Numbering in Document Generation.....	780
Overriding Styles.....	781
When to Add Styles to Templates.....	781
Steps for Adding Styles to Templates.....	782
Style Examples.....	782
Character Limitations.....	785
Protected Areas.....	786
Outline Numbering.....	786
Spelling and Grammar Checks in Microsoft Word.....	787
Document Comparison Considerations.....	787
Document Preview and Edit Differences.....	787
Adding a Table of Contents to a Document.....	788
Troubleshooting Integration Issues.....	789
Editing and Maintaining Documents Using Content Controls.....	796
Inserting Ad Hoc Text.....	796
Tagging Content with Content Controls.....	796
Adding a Custom Button.....	798
<b>Chapter 22: Supplier Contract Management Helpful Hints.....</b>	<b>805</b>
Understanding Helpful Hints.....	805
Implementation and Setup.....	805
Supplier Contract Management Setup Needs.....	805
Setup Manager for PeopleSoft Supplier Contract Management.....	808
Dispatch, Comparison, Render, and Prepare Error Resolution.....	808
Microsoft Word Document Launch Problems.....	810
Microsoft Word Template File Errors.....	810
Document Preview and Generation Errors.....	811
Contract Library Setup.....	811
Microsoft Word Integration and Formatting.....	812
Microsoft Word Protection Feature Prevents Document Formatting.....	812
Clause Editing and Special Characters.....	812
Microsoft Word Prevents Text Edits or Tracked Change Acceptance.....	813
Cannot Cut or Paste from Microsoft Word Files Into PeopleSoft Pages.....	813
Clause Content Alignment in Documents and Configurators.....	813
Page Numbering Inconsistent in Microsoft Word Documents.....	814
Character Column Alignment (Such as in a Signature Page).....	814
Research Task Pane Returns Some or No Results.....	814
Bind Type Validation Errors During Check In.....	815
<b>Chapter 23: Delivered Workflows for PeopleSoft Supplier Contract Management.....</b>	<b>817</b>
Delivered Workflows for PeopleSoft Supplier Contract Management.....	817
Agreement and Verification Step Notification.....	817
Clause Approval.....	818
Collaboration.....	819
Document Approval.....	819
Document Signatures.....	820
Spend Threshold.....	820
<b>Chapter 24: PeopleSoft Supplier Contract Management Reports.....</b>	<b>823</b>
PeopleSoft Supplier Contract Management Reports: A to Z.....	823
PeopleSoft Supplier Contract Management Selected Reports.....	825
Common Elements Used with PeopleSoft Supplier Contract Management Selected Reports.....	825

Document Status Summary (CS_DOC_STAT1).....	825
Document Status Detail (CS_DOC_STAT2).....	827
Contract Content Deviations (CS_OBJ_DEV).....	828
Contract Content Usage (CS_OBJ_USAGE).....	829
Unused Contract Content CS_OBJ_UNUSE.....	830



# Preface

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## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see [Configuring Context-Sensitive Help Using the Hosted Online Help Website](#).

### Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See [Configuring Context-Sensitive Help Using a Locally Installed Online Help Website](#).

### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

<b><i>Typographical Convention</i></b>	<b><i>Description</i></b>
<b>Key+Key</b>	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For <b>Alt+W</b> , hold down the <b>Alt</b> key while you press the <b>W</b> key.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.  Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY\_CD\_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY\_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

### Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

## Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

---

## Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help
- Managing Hosted online help
- Managing locally installed PeopleSoft Online Help

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## PeopleSoft FSCM Related Links

[Oracle Help Center](#)

[Hosted Online Help](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

Financial and Supply Chain Management information for Search Framework search engine can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the "Understanding Search Pages within Components " (Application Fundamentals) topic.

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

[PeopleSoft Spotlight Series](#)

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## Contact Us

Send your suggestions to [pssoft-infodev\\_us@oracle.com](mailto:pssoft-infodev_us@oracle.com).

Please include the applications update image or PeopleTools release that you're using.

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## Follow Us

<i>Field or Control</i>	<i>Description</i>
	<a href="#"><u>YouTube</u></a>

<b>Field or Control</b>	<b>Description</b>
	<u>Twitter@PeopleSoft_Info.</u>
	<u>PeopleSoft Blogs</u>
	<u>LinkedIn</u>



# Getting Started with PeopleSoft Supplier Contract Management

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## PeopleSoft Supplier Contract Management Overview

Supplier Contract Management provides you with the framework to create and manage the transactional procurement contracts used for executing purchases, as well as providing robust document management authoring capabilities to create and manage the written contract document using Microsoft Word. The system also provides a structured method to develop and manage the contract clause library and the life cycle and approval processing for documents.

Using the application, you can:

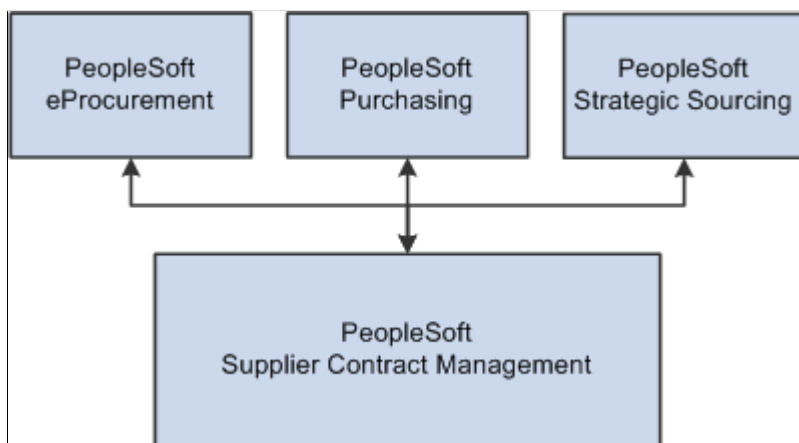
- Create transactional purchasing contracts for purchase execution.
- Develop contract clause libraries, document configurators, and user-defined wizards used for document generation.
- Author contract documents related to the transactional purchasing contract using the contract library.
- Author ad hoc type documents that are not related to the transactional purchasing contract using the contract library.
- Create document types to categorize and control the life-cycle management of various contract and noncontract-related documents you want to maintain, such as requests for contracts or nondisclosure agreement-type documents.
- Create, update, and monitor contract agreements to track deliverables and compliance for PeopleSoft Purchasing contracts and PeopleSoft Strategic Sourcing requests for quotes.
- Manage the document life cycle and track executed contracts and amendments.
- Import legacy documents into the document authoring system, and include them for indexing in the search framework repository for those formats supported by Search Framework search engine.
- Import clauses from existing Microsoft Word contracts by using content controls and uploading the file.
- Perform robust searches for contract and clause library content and related field information.
- Provide users with a native Microsoft Word environment in which they can work with documents.
- Incorporate workflow approvals for document and clause approvals.
- Collaborate with internal users on contracts.
- Send contracts to suppliers and track them.

- Capture digital signatures for internal and external parties or both.
- Syndicate supplier contracts to other transactional systems.

---

## PeopleSoft Supplier Contract Management Integrations

This process flow illustrates the PeopleSoft Supplier Contract Management integrations with other PeopleSoft such as eProcurement, Purchasing, and Strategic Sourcing:



Supplier Contract Management integrates with the following PeopleSoft applications:

- PeopleSoft Purchasing.
- PeopleSoft eProcurement.
- PeopleSoft Strategic Sourcing.

### Purchasing

Supplier Contract Management includes a transactional contract definition entry page that is fully integrated to Purchasing for purchase order creation, integration to requests for quotes, and accounts payable. In addition, using the transactional contract definition, you have access to Supplier Contract Management's electronic contract repository, document authoring capabilities, and contract compliance monitoring features. Within the transactional contract component, you can generate an authored contract. Using the authoring system, you can create document clauses that link to transactional information, such as supplier and item IDs included on the contract, and then use that information to create the contract document.

In environments where the transactional purchasing contract is not used, and instead the transactional purchase order alone is used on the transaction side, you can optionally configure the system to author contract documents based on the purchase order transactional data.

---

**Note:** The Supplier Contract Management authoring capability is not intended to be a replacement for the Purchase Order Dispatch report and its calculations. Instead, Supplier Contract Management's authoring is intended for Microsoft Word-based contract documents that have terms and conditions along with transactional information that you can bind to the document. The authoring does not provide the specific layout, and coding within it to present data to match the Purchase Order Dispatch report

---



Purchasing also provides you the capability to generate contract request type documents within Supplier Contract Management documents through the Add/Update Requisition page. You can either create a document for use with a requisition or maintain a document that exists for the requisition. This feature enables you to collect user responses related to contract requests that the system can later provide to contract specialists when they are authoring the contract document itself. When the requisition is approved, and the system creates the corresponding transactional contract through the request for quote or through the Strategic Sourcing award process, the system can carry forward responses to wizard requisition questions for the contract specialist to use to generate the formal contract document.

## PeopleSoft eProcurement

PeopleSoft eProcurement provides you the capability to generate contract request type documents within Supplier Contract Management documents through the eProcurement requisition page. You can either create a document for use with a requisition or maintain a document that exists for the requisition. This feature enables you to collect user responses related to contract requests that the system can later provide to the contract specialist when authoring the contract document itself. When the requisition is approved and the system creates the corresponding transactional contract through the request for quote or through the Strategic Sourcing award process, the system can carry forward the responses to wizard requisition questions for the contract specialist to use to generate the formal contract document.

## Strategic Sourcing

The Strategic Sourcing application provides integration for agreements. These are deliverables that are included in the event (request for proposals). Agreements can reference the Supplier Contract Management clause library for content, which the system includes on event header or line bid factors. When you award an event to a contract, the system transfers agreement information to the transactional contract, including contract-specific agreement clauses that you can include in the final contract document.

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**Note:** Since Supplier Contract Management provides an additional ad hoc source transaction along with user-defined document types, it is often possible to create additional authored document types using the system for various purposes. While not integrated specifically with other system sources, document types that use ad hoc source transactions can contain user-defined fields, wizards, and role-level security to model various types of documents that you might require.

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# PeopleSoft Supplier Contract Management Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for the organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding documentation.

Supplier Contract Management also provides a clause and document import that can facilitate an implementation. The clause import capability enables you to use existing clauses from a Microsoft Word document and tag them within the document, then upload the document into Supplier Contract Management clause library. In addition, the system provides document import functionality so that you can import legacy contracts on a case-by-case basis as they need to be brought into the system.

## Other Sources of Information

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

See the product documentation for *PeopleTools: Component Interfaces*

---

## Related Product Documentation

The *PeopleSoft Supplier Contract Management* documentation provides you with implementation and processing information for Oracle's PeopleSoft Supplier Contract Management system. However, additional, essential information describing the setup and design of the system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of this documentation.

The following companion documentation contains information that applies specifically to Supplier Contract Management.

- *PeopleSoft Application Fundamentals*
- *PeopleSoft Purchasing*
- *PeopleSoft Source-to-Settle Common Information*
- *PeopleSoft Supply Chain Management Common Information*

---

**Note:** While it is possible to use PeopleSoft Supplier Contract Management release 9.0 or 9.1 with Microsoft® Office Word 2003 it is highly recommended to use Microsoft® Office Word 2007, or later version, which supports the Microsoft Office Open XML format. Other Microsoft products mentioned in this documentation, including Excel, PowerPoint, Visio, Windows, Windows NT, and Wingdings, are either registered trademarks or trademarks of Microsoft Corporation in the United States or in other countries. Microsoft product screen shots are reprinted with permission from Microsoft Corporation.

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# Understanding PeopleSoft Supplier Contract Management

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## PeopleSoft Supplier Contract Management

PeopleSoft Supplier Contract Management is an application for use in the source-to-settle business process for managing supplier contracts. The application works in conjunction with the transactional contract functionality in PeopleSoft Purchasing, buy-side events in PeopleSoft Strategic Sourcing, and requisition request-related documents in PeopleSoft eProcurement to assist an organization in obtaining goods and services at reduced contract prices. The system accomplishes this by linking Microsoft Word-based authored contracts to these source transactional elements.

For this release, Supplier Contract Management features include integration with Microsoft Word XML that is supported in Microsoft Word 2007, or later versions that use the Microsoft Office Open XML format. This integration enables the authoring process to occur in an environment that is comfortable to most users, while achieving the control and compliance benefits that come with originating and maintaining the contract in the PeopleSoft system. To support the PeopleSoft .xml information rendered within Microsoft Word documents, anyone who edits authored documents created within the PeopleSoft system must use Microsoft Word 2007, or later version, using the Microsoft Office Open XML format.

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**Note:** With this release of Supplier Contract Management, it is assumed that if you are integrating Microsoft Word with Supplier Contract Management, that you are using Microsoft Word 2007, or later versions that use the Microsoft Office Open XML format. If your organization continues to use Microsoft Word 2003, please reference prior versions of this documentation for setup and usage steps.

---

The application provides an electronic contract repository, document authoring and search capabilities, contract syndication to third-party systems, and contract compliance monitoring. Digitizing the entire contract, including the terms, conditions, and performance clauses, prevents contracts from being lost in file cabinets, adds to their control and use, and makes the contract process more manageable.

You can reduce exposure and risk due to nonstandard contracts by requiring contracts to use preapproved language in a structured clause library and having the system alert you to potential variances in specific cases. If the inclusion of a particular clause requires special approval from the Legal department, for example, you can configure the clause definition to enforce that approval policy. Also, using special .xml tags, you can import a clause or multiple clauses directly into the clause library.

The application enables you to specify preapproved configurations that contain the business logic for drafting the contract. In situations for which special cases exist that typically require changes to boilerplate agreements, you can define wizard questions in Supplier Contract Management to invoke the appropriate clause inclusion which, in turn, can invoke special approval requirements.

Also, you can enforce the contract terms that you negotiate through contract agreement capabilities of the application. Agreements are the deliverables for contract terms. You can identify external and internal owners and notify them when agreement actions are required. For example, you can easily track and monitor periodic supplier reviews or required verification information on transactional contracts. In

addition, you can automatically include any agreement-related clause in an executed Microsoft Word contract document.

Having an integrated system for managing buy-side contracts enables you to take advantage of setup and transactional information contained in the PeopleSoft Supplier Relationship Management solution when authoring contracts, thus increasing the speed, control, and accuracy of the process. You can use integrated transactional information, such as supplier names and amounts, to process the inclusion of specific contract content, or as fill-in-the-blank values in the authored document.

The application also enables online supplier-side collaboration during the drafting process, as well as online preparation and capturing of digitally signed documents.

## Common Elements Used With PeopleSoft Contract Management

<i>Field or Control</i>	<i>Description</i>
<b>Approval Status</b>	Used to indicate the authorized use of a clause or section within a document. While pending clauses and sections can be used within a document configurator, they are not included in a generated document unless their approval status is Approved.
<b>Bind Variable</b>	A variable that can be defined in the system and used within clauses, sections, and rules. Bind variables are defined as transactional or wizard types. For example, transactional types might be fields within a transactional contract. Wizard types are user-defined variables for use within the wizard entry during document generation. When the system generates a document, it replaces bind variables with either transactional data or defaults supplied by the wizard.
<b>Clause</b>	The basic building block for a document, clauses can include the wording for contract terms and conditions that you store, update, and reuse within a document. You can enter simple clause text directly within the PeopleSoft system, and add rich text to clauses through Microsoft Word integration.
<b>Clause Group</b>	Provides a means for categorizing clauses according to a standard user-defined class or group structure. For example, you might have a group of clauses that relate to indemnification for work that is performed at the buyer's site.
<b>Contract Document</b>	A textual document created in PeopleSoft Supplier Contract Management that you can base on an ad hoc contract, a PeopleSoft Purchasing contract, or a purchase order.
<b>Contract Syndication</b>	The process of making contract information available or allocating the information to third-party systems for execution and capture. The Supplier Contract Management system is the primary contract system of record for syndication activities.

<b>Field or Control</b>	<b>Description</b>
<b>Contract Version</b>	Contract versions refer to the revision of a procurement contract transaction that has been entered through the Contract Entry component. This functionality provides you a method to revise the transactional contract as a new draft version while the prior version of the contract is still active within procurement.
<b>Contract Wizard</b>	A utility that asks questions about a contract. Based on the responses and previously defined rules for the wizard, the system selects appropriate clauses from the library and adds them to the document. You also use the wizard to create question sets that guide you through developing nontransactional information for a document.
<b>Digital Signatures</b>	The capability to create a digitally signed document within Peoplesoft Supplier Contract Management. A digital signature document can be prepared, where the system locks the main document, and routed for multiple signatures internally as well as sent or placed online for external supplier signatures. Supplier Contract Management supports the creation of digital signatures using Adobe Acrobat PDF format or using the digital signature features enabled by preparing a Microsoft Word .docx signature document. The .docx file format is used for signatures only.
<b>Document</b>	Refers to the actual generated document with all clauses, terms, and conditions as is produced using the Supplier Contract Management document authoring feature. You can create documents from a Purchasing transactional contract or on an ad hoc basis. You can use ad hoc documents for legal documents outside of the PeopleSoft Procurement system, such as a nondisclosure statement.
<b>Document Configurator</b>	A predefined but dynamic structure that serves as a template for building documents. Document configurators are made up of clauses, sections, and rules that can be sequenced to provide a logical grouping of clauses to start and complete documents. Document configurators are dynamic in that they consist of pointers to content, such that when the system generates a document, the correct (typically, the most recent) clauses, sections, and rules are incorporated into the document.
<b>Document Library</b>	A repository of documents and their components that include sections, clauses, and document configurators. Using elements from the library, you can create and update documents, track versions, collaborate on contracts, and dispatch and execute contracts.

<b>Field or Control</b>	<b>Description</b>
<b>Document Type</b>	<p>A document categorization capability that you can use in the contract management system. Using a document type, you can define settings and options that can help tailor the use of the document to make it more usable for certain business situations. For example, you can define a document type for ad hoc documents to generate a contract request, another for a contract summary, and another for formal contracts. You enable the use of document types through installation options. Some features, such as the configurator selector wizard and requests for contracts, require the use of document types.</p>
Document Version	<p>A separate version control feature provided within PeopleSoft Supplier Contract Management for contract documents. This feature enables you to create new versions of the contract document independent of the transactional contract.</p>
<b>Effective Date</b>	<p>The date on which a table row becomes effective; or the date that an action begins. Within Supplier Contract Management, use effective dating to control versions of clauses, sections, and rules.</p>
<b>Local System</b>	<p>The PeopleSoft system of record that publishes and maintains contract information for the parent contract.</p>
<b>Question Group</b>	<p>A set of questions that guide you through developing nontransactional information for a document. The questions are defined as a set of preconfigured questions and are associated with a question group that is used by a wizard.</p>
<b>Repeating Element</b>	<p>A document element, such as a clause, section, or rule, that is based on transaction information, such as binds, that might have multiple values for a contract. For example, contract items in a purchase order contract, or contact information in an ad hoc contract.</p>
<b>Rule</b>	<p>A set of query-like conditions that produce specific true or false results. The system uses these results to include additional or alternative sections or clauses within documents. You can use rules within:</p> <ul style="list-style-type: none"> <li>• Clauses to define alternate clauses.</li> <li>• Sections to optionally include additional clauses.</li> <li>• Document configurators to include optional clauses and sections.</li> </ul> <p>Since the rules themselves generate structured query language (SQL) and can have performance implications, they should only be defined and maintained by technical personnel.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Run Control ID</b>	An identifier that, when paired with a user ID, uniquely identifies the process that you are running. In addition, the run control ID enables the availability of important parameters for a process when it runs. This ensures that when a process runs in the background, it does not have to prompt for any additional values. All parameters are stored within the system and associated with run control IDs and user IDs.
<b>SetID</b>	An identification code that represents a set of control table information or tablesets. A tableset is a group of tables (records) that are necessary to define an organization's structure and processing options. Most contract information is managed and maintained at the SetID level.
<b>Status</b>	<p>Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i>. You cannot display inactive rows on transaction pages or use them for running batch processes. The <i>Inactivate</i> value also enables you to maintain an audit trail of data that you no longer use. Approval statuses are also used along with the status.</p> <p>Within Supplier Contract Management, clauses are typically considered to be in an Active status even when they are not yet in the approval status of Approved. For example, clauses might be in an Active status but are still in the approval status of Initial or Pending Approval. However, for a clause to be included within a generated document, it must be in both an Active and Approved status. To retire a clause or to put a clause on hold, you can use the status of Inactive.</p>
<b>Transactional Contract</b>	Refers to the transactional portion of the contract as it exists in the Purchasing application. The transaction generally has an associated document. A transactional input to a document might include a fixed price, where the contract document can use the value to determine progress payments.

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## Supplier Contract Components

This topic discusses:

- Supplier contract components.
- Requests for proposals.
- Transactional purchasing contracts.
- Transactional purchase orders.
- Requisition documents.
- Agreements.

- Source transactions for authoring purposes.
- Document library.
- Document life cycle.
- Syndication.

## Supplier Contract Components

You can define supplier contracts as stand-alone, ad hoc documents with document life cycles, or couple them with transactional procurement contracts or purchase orders that you can, optionally, originate from Strategic Sourcing or Purchasing requests for quotes. For transactional contract documents, you can create the document after you create the transactional contract or purchase orders.

Using the transactional system, the Supplier Contract Management application assists in the sourcing bidding process by associating document clauses to bid factors and mapping bid factors to one or more agreements. The application then passes the selected negotiated terms into the awarded contract as agreements. Using Strategic Sourcing, you can include these clauses within the event and Adobe PDF event as the proposals are initially sent to suppliers. When you award the contract, the system uses the clauses from the event for you to include in an authored Microsoft Word contract document.

Using the transactional system, you can also work with the transactional purchasing contract. You access the Purchasing contract from within Supplier Contract Management. You use the Purchasing contract pages to perform purchasing tasks for the contract, such as creating the contract and associating the supplier and maximum amounts, adding line items, and releasing contract quantities.

If you use purchase orders instead of the purchasing contract transaction, you can alternatively author contract documents using the purchase order transaction as the source to link and bind information into an authored contract. You use installation options to enable purchase order contracts, purchasing contracts, or both.

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**Note:** Supplier Contract Management is not intended to replace the purchase order dispatch process for most purchases; however, in cases where a more formal contract document is required, you can use the supplier contract authoring system to create the document and manage its life cycle including collaboration and creating amendments.

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**Note:** When you author documents from purchase orders, the system does not include service level agreement integration as it does for transactional contracts.

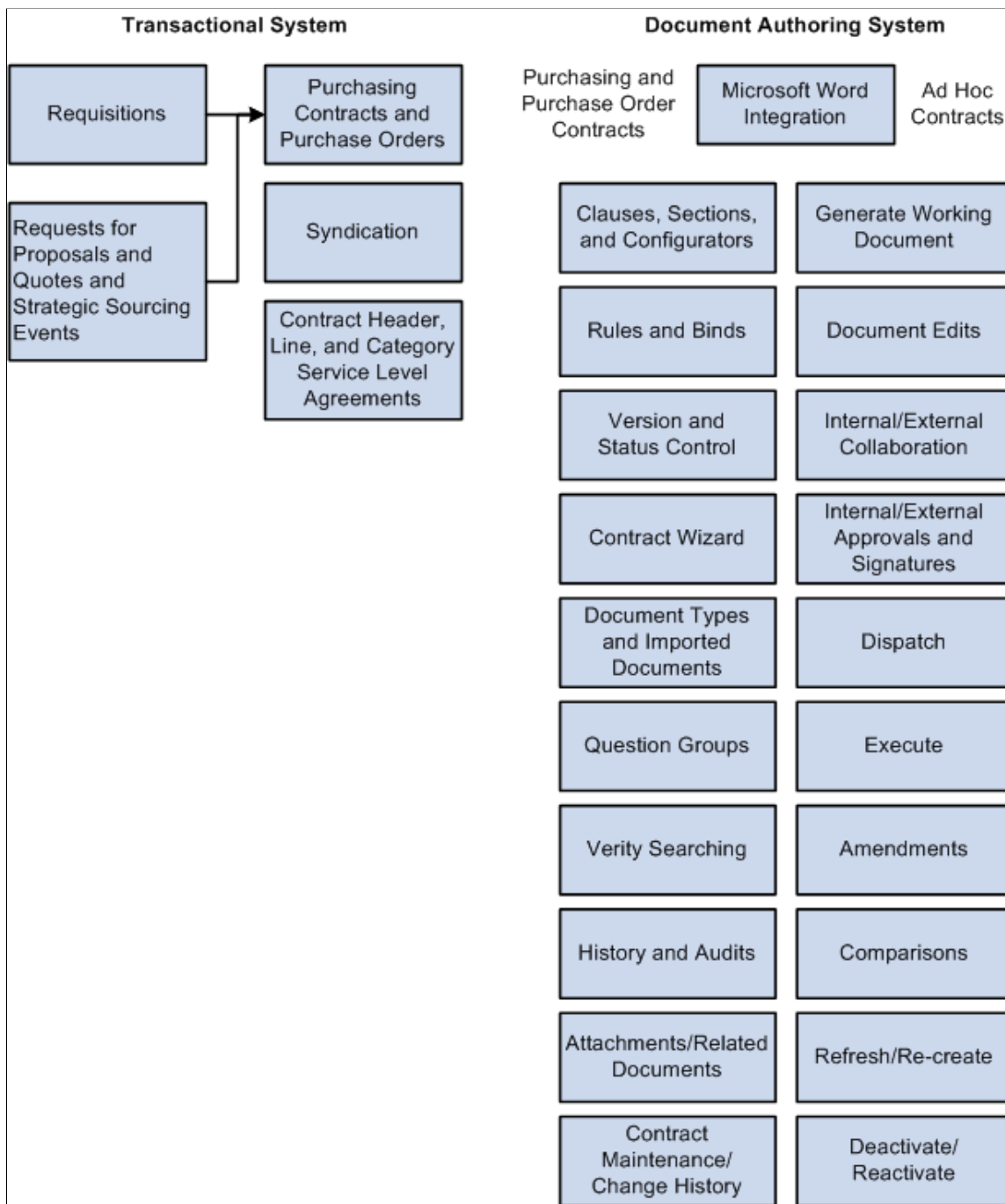
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Along with performing basic contract activities, Supplier Contract Management offers document authoring capabilities and agreements that enable you to create documents using the transactional information as content, or to process rules that control the content for the authored document. For example, when generating an authored document that is linked to a transactional purchasing contract, you can automatically include values for the supplier name, maximum amount, addresses, and item numbers in the Microsoft Word document.

You use the document authoring system to create formatted documents based on purchasing contract information, purchase orders, or you can create ad hoc documents that are not linked to transactions for general use. The system builds both types of documents using PeopleSoft classic desktop browser UI pages. After defining parts or all of a contract, you use the system to generate a document that you can also view and edit in Microsoft Word.



This diagram illustrates the components of the transactional and the document authoring systems that make it possible to create documents:



You define the elements of a document using the document library. The library consists of building blocks that work with basic supplier contract setup information. You use these elements as the foundation for document generation.

**Note:** Not all of the components that appear below the Document Library box in the previous figure appear on the Manage Contract Library page.

After the system generates a document, the life cycle of the document begins. The actions you take against the document and the events the document goes through make up the document life cycle. These

actions include submitting the document for internal and external collaboration, processing approvals, and executing the original contract and any amended versions.

## Requests for Proposals

Requests for proposals and quotes are the beginning processes for creating contract documents used from PeopleSoft Strategic Sourcing. Using this application, you can associate agreements and document clauses originating in the clause library to bid factors to provide additional legal, policy, or other terms to bidders during the bidding process. You can include the agreement information and clauses in the dispatched version (SQR) of the PeopleSoft Strategic Sourcing event for review by the supplier. An automated process is available that enables you to place request-related agreements and clauses into the transactional purchasing contract and into a related contract document when the event is awarded to a contract.

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**Note:** Requests for proposals and quotes do not apply to awarded purchase orders.

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## Transactional Purchasing Contracts

The Contract Entry component in PeopleSoft Supplier Contract Management is integrated with PeopleSoft Purchasing, enabling you to create and maintain contracts from within the supplier contract system. At the same time, you can use the contract document authoring system to create the contract document. Procurement contracts that were added or updated before the implementation of PeopleSoft Supplier Contract Management are also enabled for Supplier Contract Management contract authoring.

### Related Links

[Understanding Authored Documents](#)

## Transactional Purchase Orders

The purchase order maintenance functionality in PeopleSoft Purchasing is also integrated with the PeopleSoft Supplier Contract Management application, enabling you to create and maintain contracts that are linked to purchase orders as an alternative to the transactional contract. Purchase orders that were added or updated before the implementation of Supplier Contract Management are also enabled for supplier contract authoring.

The main purpose of authoring a contract document based on the purchase order is to generate a contract document from the purchase order. This keeps the document synchronized with the purchase order and prevents the double entry of information. As a business process, the authored contract should normally be executed prior to the initial approval, dispatch or execution on the purchase order.

While using the transactional purchase order contract through the Contract Entry page is beneficial for working with contract documents, an organization might prefer to use the Purchasing purchase order because it provides a variety of features that are not a part of the transactional contract. These features include requisition to purchase order processing, related change order processing, commitment control, and receiving against the purchase order.

Using transactional purchase orders, you can use most authoring features available for the transactional Purchasing contract. These include the life-cycle functions, such as internal and external routing for collaboration and amendment creation. You can also use functions such as importing and copying a

document for use with the purchase order contract document and providing supplier-side access to the purchase order contract document

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**Note:** Document authoring is not intended to replace the existing purchase order dispatch process, but you can use it in situations where the procurement contract functionality is not being used as a source transaction and you need the authoring and life-cycle management of the contract document related to the purchase order.

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## Related Links

"Creating Procurement Contracts" (PeopleSoft Source to Settle Common Information)  
[Creating Authored Documents](#)

## Requisition Documents

To help maintain the flow of information from the inception of a contract to its being awarded with a contract document, you can use the PeopleSoft eProcurement or Purchasing requisition process to collect requester information about the future contract, and have that information available in a document. You use document types to establish the wizard and document configurator for creating requisition documents, making the document available for the requisition and then using the requester's responses to help formalize content in the eventual contract document authored by the specialist. For example, you might ask the requester to answer several questions related to a contract request that is tied to the requisition. As part of that initial question and answer process, you can create a summary justification document and relate it to the requisition. After you source the requisition through the request for quote or bid process and award it to a transactional contract, the system validates that the requisition document exists, and enables the specialist to then pull forward any wizard responses from the requester and incorporate them into the authored contract to automatically include appropriate contract content or to fill in the blanks within the authored document.

## Agreements

Agreements provide a mechanism to define and manage internal and external agreements, also called deliverables, for the contract. You use the Supplier Contract Management system to update, monitor, and validate agreements. You can assign agreements through Strategic Sourcing bid factors and Purchasing contract agreements. Agreements make it possible for you to ensure that a supplier is in compliance. The system enables you to:

- Attach clauses from the clause library to an agreement.

Clauses can define the details about the subject of the agreement, for example, how a custom product is inspected upon delivery. You can use the agreement in both requests for quotes and Purchasing contracts.

- Set up internal and external owners.
- Define notifications.
- Track contract compliance by requiring owner verifications of steps. You can set up deliverable steps for internal and external updates (supplier portal) as required.
- Document deliverables by attaching documents, comments, and responses that support compliance.

- Use procurement history to establish metric measurements that provide you a means to analyze a supplier's quality, quantity, and delivery performance against the terms of an agreement specific to each contract.

You can assign agreements to a contract header, category, or line items in the contract. The system also provides you a means to update, monitor, and review agreements, their verification steps, statuses, and workflow notifications. After creating an agreement, you use the feature to manually manage the agreement.

### **Related Links**

[Agreement Management](#)

[Reviewing and Updating Contract Agreement Statuses](#)

[Updating Contract Procurement History](#)

[Monitoring Agreement Compliance](#)

[Understanding Contract Agreements](#)

[Understanding Agreement Metrics](#)

[Assigning Agreements to Purchasing Contracts](#)

## **Source Transactions for Authoring Purposes**

You use three types of sources to generate authored documents: purchasing contract, purchase order, and ad hoc.

The purchasing contract source transaction enables you to create contract documents that can reference and include transactional purchasing contract information such as supplier name, maximum amounts, and line items in the authored Microsoft Word document. This source also enables you to define rules specific to the purchasing contract that can control document content. The system uses field values from the transactional contract to replace predefined bind variables in documents.

Ad hoc contract documents are stand-alone documents that are not associated with a transactional purchasing contract. For example, you can create a nondisclosure agreement as an ad hoc document. The system processes ad hoc and purchasing contract documents in a similar manner, but their primary difference is that documents that are generated from the purchasing contract (source transaction) are linked to the purchasing contract. The link occurs when the contract number and the values in the authored contract document refer back to specific values (bind variables) in the transactional purchasing contract. The ad hoc document content can reference only wizard-based bind values or bind values related to the Document Management page, such as external contacts.

### **Related Links**

[Understanding Microsoft Word Document Generation](#)

[Refreshing Microsoft Word Documents](#)

[Viewing Document Generation Logs](#)

## **Document Library**

This topic discusses components of the document library and how you use the Document Management page to find, track, and monitor library contents. The library contains the reusable building block components for the authoring system and is a repository of documents and their components, including

sections, clauses, and document configurators. Using elements from the repository, you can create and update documents, track versions, and view document history.

You can also import legacy contract documents into the document library. Legacy documents are those preexisting contracts and documents that were not created in the document authoring system. After you import a document, you can collaborate on the document and take it through an approval. You can also perform searches on imported documents.

See [Importing Clauses and Sections](#), [Importing Documents](#), and [Understanding the Contract Library](#).

## Clauses, Sections, and Document Configurators

Clauses, sections, and document configurators comprise the core grouping of document components. Clauses are the basic building blocks for a document, and can include the wording for contract terms and conditions that you store, update, and reuse within a document. You can enter simple clause text directly in the PeopleSoft system, and add rich-text format (RTF) text to clauses through Microsoft Word integration. Clauses are effective-dated to enable new versions by date. This enables you to set up clauses to require different levels of workflow approvals by selecting an effective date for the clause.

You use sections to group clauses, other sections, and rules for use in a document. Sections are intended to provide a method of creating reusable and nested document structures. Section types, such as general and introduction, organize and control the document behavior. Sections are similar to clauses when you use them with Microsoft Word. Sections are effective-dated to enable new versions by date; however, sections are approved manually and not through approval workflow.

Document configurators are predefined but use a dynamic structure that serves as a template for building documents. Configurators are made up of clauses, sections, and rules that can be sequenced to provide a logical grouping of clauses to start and complete documents. Configurators are dynamic in that they consist of pointers to content, such that when the system generates a document, the correct (typically, the most recent) clauses, sections, and rules are incorporated into the document. A document configurator is not effective-dated; however, its contents are effective-dated. The configurator contains a **View As Of Date** field that enables the viewing of effective information. You can preview the status and content for a configurator for any date that you enter.

A document configurator can be a source-specific configurator that is intended for use with a specific source only, such as ad hoc documents. Or, you can specify that the configurator is to be used with more than one source. This is a multi-source configurator that you use when the document layout is similar, such as using similar contract layouts regardless of whether the source transaction is a purchasing contract or purchase order. .

See [Understanding the Contract Library](#).

## Rules and Binds

A rule is a set of query-like conditions that produce specific true or false results. The system uses these results to include additional or alternative sections or clauses in documents. You use rules in clauses, sections, and document configurators. And, you can use rules to define the composition of a document based on wizard responses and transactional bind variables.

A bind is a variable that you define in the system and use in clauses, sections, and rules. Bind variables are transactional or wizard types. When the system generates a document, it replaces bind variables with either transactional or question response values supplied by the wizard.

See [Understanding Authored Document Rules](#).

See [Understanding Bind Variables](#).

## Contract Wizard

A wizard is a tool that automatically guides you to answer questions and then uses those answers either as input to a document or to determine a configurator to use for a document. The system provides a document creation wizard and a configurator selector wizard. The document creation wizard uses rules to insert different document elements based on the answers that you provide to the wizard questions. The document creation wizard can both determine the contents of a document as you respond to the questions and complete the content in a generated document. After you create this type of wizard, you can link it to one or more document configurators.

You use the configurator selector wizard in conjunction with document types. When using document types, you can create a type of document that automatically runs a configurator selector that selects the appropriate configurator to use with the document. You create and maintain both types of wizards using question groups and wizard pages.

See [Setting Up Question Groups for a Wizard](#).

## Question Group

A question group is a logical set of topic-related questions that result in the population of one or more bind variable values. Question groups can have one or more associated questions. You can assign a bind variable to a question and the response to that question is stored within the bind variable for later use when you create the document. Question groups also enable you to define a list of values that provide document authors more flexibility in using wizards by prompting and guiding them through questions. The question group definition contains navigational capabilities that enable authors to skip certain questions depending on the response.

See [Setting Up Question Groups for a Wizard](#).

## Document Type

Document types provide a framework for organizing the various documents that you need to create in the organization and provides unique controls over documents within each document type. Using document types, you can define specific settings, defaults, and security that can help fine-tune the use of each type of document. Among document type features, the system provides you the capability to link a document to a PeopleSoft eProcurement requisition as a supporting request for contract type of document. Other features include:

- Role-based security to determine which users have access to document types for creating documents.
- Default configurator assignment by document type.
- Configurator selector wizard that determines which configurator to use when creating a document.
- Life-cycle statuses based on document type.
- Document and amendment cycle times and document collaboration and approval warning indicators.
- Automatic document creation option that simplifies the user experience for self-service users.
- Role controls for viewing and using documents created using document types.
- Internal and external collaboration settings.

- Digital signature requirement settings.
- User-defined field use and configuration.
- An installation option that makes document types available for use.

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**Note:** After document types have been used to create a document, you cannot change the installation option setting.

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See [Setting Up Document Types](#).

## Search Framework

Search Framework search engine is used by PeopleSoft applications to perform free-text data searches. A search index is a specific directory or folder that contains multiple subdirectories with various kinds of files for use by the search engine during indexing and searching. The application administrator defines and builds search indexes. Among the searches you can perform are:

- Content type searches that use the Search Contents component to locate specific documents or elements of the library.

For example, you can search the text to identify all clauses or current documents containing that text.

- Text searches in imported documents and searches based on document types.
- Where-used searches that enable you to locate where a document element is used within the document library.

For example, you can identify which clauses are included in which sections and which sections are included in which document configurators.

See [Understanding PeopleSoft Search Framework and Where-Used Searches](#).

## Document Life Cycle

This topic discusses components of the document life cycle that include events for its review, collaboration, and approval, as well as its dispatch, execution, and amendments. After you define the building blocks for the document, you are ready to use a purchasing contract or an ad hoc document configurator type to generate a draft Microsoft Word document. This is the first event in a document's life cycle. As a document goes through its life cycle, the document authoring system tracks the events and saves detailed accounts of changes made to the document in the document library.

You can also import legacy contract documents into the system and use life-cycle features to manage the documents. Most contract functions apply to the legacy contracts except for limitations for refreshing and re-creating documents, the document modification summary, and the generation log. Imported documents are not parsed and stored as plain text.

See [Understanding Document Life Cycles](#).

## Document Version and Status Control

Supplier Contract Management provides a means to manage document versions when you are checking in, refreshing, or re-creating documents. Along with defining minor and major versions, you can set up the system to provide the option of leaving the version the same when you check in the document.

Life cycle statuses are included to manage documents in statuses of Draft, Collaboration, Approval, Dispatched, Executed, and Inactivated.

See [Refreshing and Re-creating Documents](#).

If you use installation options to require document approvals, Approval Framework processes control the statuses of documents. If you use the PeopleSoft Approval Framework, an application administrator must set up the process, steps, and users that make up the approval process.

When you are not using workflow, you can manually update the approval status.

See [Understanding Document Approvals](#).

## Document Creation

The beginning of the document life cycle is the generation of the document. During document generation, the system uses the document configurator to generate either an ad hoc or a purchasing contract document.

When you click the **Create Document** button for either type of document, the system begins to generate the Microsoft Word document. If a wizard is present on the document configurator, the system invokes it before contract generation. Upon completion of the generation process, the system provides a generation message if problems were experienced during the generation. You can resolve the issues and re-create the document. After you generate a document, you use the Document Management page to manage documents through their life cycles. The system provides a series of buttons that you can use to select events and actions in managing document life cycles.

For additional information about document creation, see [Understanding Microsoft Word Document Generation](#).

## Document Edits, Previews, and Views

Along with editing and viewing documents using PeopleSoft classic desktop browser UI pages, you can edit, preview, and view documents in Microsoft Word. You can preview documents when working with clauses, sections, and configurators. Previewing documents enables you to review the Microsoft Word version of the document element as you build it. At the clause and section level, you can also validate variables as you create and edit the element before using them in configurators.

**View Document** and **Edit Document** buttons are available on the Document Management page, where you can edit and view the complete document. The system provides additional document controls for protecting the document when it is checked out, controlling versions, and enabling you to cancel the check out.

See [Setting Up Clauses](#) and [Setting Up Sections](#).

## Attachments/Related Documents

Attachments are additional files that provide more details about the document and that support agreement verification steps. You can upload and view a variety of documents, including Microsoft Word and Adobe Reader documents, that contain sophisticated graphics, such as a company logo or complex Microsoft Visio files. You can also upload Microsoft Excel, PowerPoint, and Access files. You can edit these files and load them again to make changes. The system does not manage attachments through the document authoring system like it does other document elements. It stores attachments for use with documents. You can also upload file attachments to document verification step results.



When you link a document to another document, then the document you link to another document is considered a related document. Related documents are other document-authoring system documents, such as a generated contract summary or a reference to a generated parent contract. Related documents can also include reference to imported documents. After you link a document to another, then you can perform where-used searches to view the other documents to which the related document has been linked.

See [Uploading Attachments for Agreement Steps](#), and [Viewing and Uploading Attachments and Related Documents](#).

## Collaboration

Collaboration is a process that brings in other internal users to review the content of the document. Collaborators are users, other than the primary owner of the contract, who can change or review documents. Their access depends on the access you give them for the collaboration cycle. The system supports internal and external collaboration process for authored or imported documents. When collaborating on authored documents externally, you can make the document accessible on the supplier-side portal for review and modification by the supplier. Supplier changes can be uploaded by the supplier, and are then staged for internal specialist review and edit prior to formally checking in the document into the system.

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**Note:** To maintain the integrity of an authored document, when a supplier checks the document directly back into the system, it's important that the supplier uses a compatible version of Microsoft Word that supports the Microsoft Office Open XML format. For example, if the supplier uses Microsoft Word 2003 instead of Microsoft Word 2007, or later version, then any changes that the supplier makes must be manually incorporated into the master authored document within the system.

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See [Collaborating on Documents](#).

## Internal Contacts

Internal contacts are users who collaborate on documents or who can have view access to the document as interested parties. You can define default internal collaborators within document management and provide a default list of collaborators and internal contacts for yourself.

Collaboration is an optional step for all contracts, and you do not have to move a contract into the approval process.

## External Contacts

You can define external contacts so that you can collaborate on documents. Collaboration is when you send versions of contracts and amended contracts to suppliers. Using external contacts, you can also enable external updates to specific contract agreement steps (deliverables) for transactional purchasing contracts. You cannot make external updates for contract agreement steps using purchase order contracts.

You can use the Document Management page to set up external contacts for each contract for document collaboration. For purchasing contract documents, you can automatically copy in contact information from the supplier contact information related to the transactional purchasing contract. When sending a version to the supplier, you can optionally mark the document as checked out to prevent users from modifying the contract while the supplier is reviewing it. To enable workflow notifications and supplier-side portal access to agreement steps, you setup external users for access within the transactional contract agreement (Contract Entry) pages.

## Approvals

When workflow approvals are enabled for documents, you can submit the document for final approval. You can design workflow approvals to meet the organization's needs. You can route a document to specific roles to review clause use or change clauses, contract amounts, categories, and so on based on the approval definition for the user. You can also establish approval statuses through document types where you can set a document to be at either a Draft or Approved status after you create it.

For additional information about document approvals, see [Understanding Document Approvals](#).

## Digital Signatures

Using PeopleSoft Supplier Contract Management, you can optionally configure the system to prepare a read-only (signable) version of the approved Microsoft Word document for signing it digitally. The contract specialist can determine when it is appropriate to prepare a PDF version of the Microsoft Word contract. The Microsoft Word contract is then locked along with the needed signature fields in the read-only document. You can access the PDF document for signature as part of the approval process for internal signatures before or after the internal approval process. The same PDF document can then be routed to the supplier for signature and return using email or, optionally, online using supplier portal access.

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**Note:** When using Adobe Digital signature capability, the system requires that the contract administrator uses Adobe Acrobat Version 8 Professional. This enables signing rights for other users who use the Adobe reader only.

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**Note:** The requirement for using the .docx format is that all signers, both internal users and external suppliers, must use Microsoft Word 2007, or later version. Unlike the PDF format the .docx format is still a Microsoft Word document and in certain statuses can be edited. After the first signature, for example, the contract specialist, is placed on the document and the .docx file can no longer be modified itself unless all signatures are cleared. Therefore, you should take care when using a .docx format to ensure that the contract specialist signs the document as part of the prepare process, and as a follow-up ensure that the document signatures have not been cleared by other users.

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See [Understanding Digital Signatures](#).

## Send/Dispatch to Contacts

The system enables you to send the contract, amendments, and any attachments to external contacts for review at any point in time. After the contract is approved, you use a similar action, called *dispatch to contacts*, to send a final contract for the purpose of executing the contract. The system provides multiple options when you send amendments. The options depend on whether you maintain the amendment in one file with the main contract, or you use separate amendment files for each amendment as it occurs.

See [Dispatching Documents](#).

## Execute

An executed contract means that the document or amendment has been dispatched to contacts for final signature and has been signed by all parties. When a document is executed, the next version of the document must be an amendment. When you are using digital signatures, the system stores the signed PDF file as part of the executed document history and you can no longer update it.

See [Executing Documents](#).

## Amendments

Supplier Contract Management provides a formal contract amendment process with the same life-cycle features, change control, and history tracking as the original document. After you execute a document, you can update it with amendments. The amendment process uses many of the life-cycle features that are used by the original document, but the process itself involves additional features that include maintaining separate amendment files for each amendment or creating the amendment as a fully amended contract version. You can also import legacy contract documents along with their amendments.

For additional information about amendments, see [Understanding Contract Document Amendments](#).

## Comparisons

You can generate a document comparison based on the current authored version of the document and a temporary, re-created version of the document or on the current version of the document and a refreshed version of the current document. The purpose of this feature is to highlight the effect from any changes in bind variables, such as an item change on the transactional contract, and to aid in the creation of new amendments by identifying differences

Additionally, you can compare staged inbound edits coming from the supplier when allowing suppliers to review and edit documents through the supplier portal. You can also do general version comparisons by selecting any two documents that exist in document history to compare them for changes. The compare feature enables you to go back in time to identify specific changes made during a particular check in of the document.

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**Note:** You can only compare authored Microsoft Word documents, not imported documents. The compare feature requires server side configuration.

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See [Comparing Documents](#) and [Setting Up Servers and Directories](#).

## Re-create/Refresh

Re-creating and refreshing documents enables you to rebuild or update existing documents. Use re-create to completely rebuild the document as if you are starting a new draft. Re-create is the same as creating a new document. Use refresh to update the document based on changes to rules and bind variables. For example, you might want to change responses to wizard questions for a contract, but several edits have been made in the document that you want to keep. Using refresh, you can change answers to the wizard questions and keep the edits to the document.

See [Refreshing and Re-creating Documents](#).

## Document History and Logging

In addition to tracking approvals and collaboration, the system provides other tracking features for documents. You use the Document Management page to review changes and actions taken against a contract. The system provides the following tracking methods:

- A document version history in which you can review who made changes to a document, when the changes were made, and the version at which the change was made.

You can also use this feature to review history for attachments, dispatches, collaboration, and generation.

- A document modifications summary that tracks clause updates, additions, and deletions in documents.

Here, the document administrator can get a quick summary of clauses that have been modified within a specific document that might, in turn, require workflow control.

- A generation log that provides details about the document generation process.

This log provides you an indication about how the system processed a document. The log provides these options:

- Detail option.

The detail log tracks details you can use to identify bind variable resolution, a log of how the configurator expanded during document generation, and a detailed wizard log. The detailed log is useful for debugging purposes when you are creating a complex configurator that makes extensive use of wizards, binds, and rules.

- Log Warnings and Wizard option.

You use this summary option to audit for any generation warnings and responses to wizard values.

For additional information about document history and logging, see [Viewing Document Version History](#).

## Deactivate/Reactivate

You can remove, but not delete, a document from use by deactivating it. This action is useful for older contracts that might be closed now and that you want to exclude from everyday searches in the system. To bring the document back into service, you can reactivate it.

See [Deactivating and Reactivating Documents](#).

## Syndication

A Supplier Contract Management feature you can use from within Purchasing, syndication enables you to send and receive contracts between the PeopleSoft system, the parent system, and one or more remote third-party systems. Using the feature, you can create a central contract in the PeopleSoft system; for example, a contract for pricing. Then, you can publish (syndicate) the original contract and any pertinent changes to non-PeopleSoft systems.

After syndication, the contract is available on the remote systems, from which remote users can create purchase orders and process receipts, vouchers, and returns to suppliers, depending on their subsystem capabilities. The parent system controls the contract updates and uses a message publishing process to publish the contract. The PeopleSoft system also permits the remote system to publish messages back to the parent system, with activities reported against the contract in the subsystem, for example, when users at the remote system make releases against the syndicated contract.

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**Note:** Syndication is for the transactional purchasing contract only. The assumption is that the third-party system uses appropriate setup data, such as suppliers, items, units of measure, that match the parent system.

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**Note:** Syndication to a remote third-party system might require mapping outbound PeopleSoft XML service operations to the inbound system and mapping messages from the third party back to the PeopleSoft system.

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## Related Links

[Understanding Contract Syndication](#)

[Setting Up Contract Syndication](#)

[Defining Contracts for Syndication](#)

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# Supplier Contract Management Integration with Other PeopleSoft Applications

Supplier Contract Management links to the Purchasing and Strategic Sourcing applications so that you can define contract documents for use with their business processes. This topic discusses:

- PeopleSoft Purchasing integration.
- PeopleSoft Strategic Sourcing integration.
- PeopleSoft eProcurement integration.

## PeopleSoft Purchasing Integration

Using the contract execution functionality in the purchasing system, you have access to these Supplier Contract Management features:

- Electronic contract repository.
- Document authoring capabilities.
- Contract compliance monitoring features.

Agreements are assigned through PeopleSoft Strategic Sourcing bid factors and Purchasing contract maintenance. This formal tracking process makes it possible for you to ensure that a supplier is in compliance against the agreements in a contract. Among the measurement methods is a metric measurement based on procurement history.

- Requisition document types.

You can create and link to requisition documents for use with Purchasing requisitions. The benefit of this feature is that you can gather information for a contract during its requisition stage and then use that information to develop the contract.

- Contract documents based on purchase orders.

The purchase order maintenance functionality in PeopleSoft Purchasing is also integrated with the PeopleSoft Supplier Contract Management application, enabling you to create and maintain contracts that are linked to purchase orders as an alternative to the transactional contract.

- Spend threshold limits.

A spend threshold is a specific monetary amount for a contract or contract item. Using the Spend Threshold feature, you can define the threshold and then notify users when spending on a contract crosses the threshold amount. In addition to defining a spend threshold, Supplier Contract

Management provides the Contract Alert Workflow component to notify buyers when spend thresholds have been reached.

Within PeopleSoft Purchasing, you can choose to use the document authoring system upon which to base contract documents. Using the authoring system, you can create document clauses that link to transactional information and then use that information to create the contract document.

You use bind variables and rules to define what transactional information to use in a contract document. For example, using bind variables in clauses, you can pull information from data fields in the contract to complete the clause. Or, you can use a rule to define data fields that include specific information, such as a supplier name, item category, or contract amount. When you create the initial document, the authoring system resolves the binds and rules from the purchasing contract to generate the document. After a contract document is created, you can access the repository to maintain the document through its life cycle.

In addition, using a wizard you can build a contract document by answering predefined questions about the contract. Based on the responses, the system selects the appropriate clauses from the library and adds them to the contract document or invokes rules to include specific content. Wizards use binds and rules to resolve transactional data for contract documents.

An example of how you could use the clause library and contract document to interact with transactional information on the contract might be to create a one-year contract for purchasing steel-alloy waste drums for hazardous material disposal along with a service requirement for the loading and removal of the filled cans. This table describes how you might accomplish this using a combination of wizard bind values and transactional bind values:

<b>Requirement</b>	<b>Document Input</b>
Firm fixed-price contract. This requirement is based on the type of contract.	The user selects a fixed-price configurator with its associated clauses and sections. The configurator contains required document elements that meet fixed-price contract needs.
Sole source supplier for the contract?	Add a wizard question that asks this question and dynamically insert a clause that contains justification text for why the contract was not open to competition. For example, perhaps this supplier is the only supplier in a region with the proper transportation clearances to move the materials.
Contract line item with a hazardous material. This value is extracted based on a hazardous material code on the item table.	Add a clause containing special handling requirements for the materials. Using transactional bind variables related to the purchasing contract, you can also include multiple hazardous-material line items that should be included in the contract document.
Vehicles less than eight tons. This value is based on a service level agreement.	Add a clause that clarifies special restrictions placed on trucks used to remove the filled cans. You can set up the clause with the agreement tied to the contract. The system automatically includes the agreement in the authored document.

## PeopleSoft Strategic Sourcing Integration

Strategic Sourcing enables you to associate clauses to bid factors to provide additional legal, policy, or other terms to bidders during the bidding process. If a sourcing event is awarded to a contract, those clauses can then be attached to the awarded transactional contract. The system adds the bidder's awarded value for each bid factor to the contract agreement and tracks it for compliance. When you create an authored document for the transactional contract, the system includes the additional contract-specific agreement clauses in the authored document.

Using sourcing bid factor setup, you can also associate agreements with clauses to a bid factor, which enables you to automatically include any agreement-related clauses that are not included in the event when you create the contract. Use the following features to manage events and bid factors:

- Search for and associate clauses to bid factors.

Clauses you assign are populated onto the sourcing event when you use the related bid factor on the event.

- Associate contract agreement codes to bid factors.

You can assign one or more agreement codes to a bid factor. Then, if a sourcing event that contains the bid factor that is marked to include on a contract is awarded to a contract, the system adds the agreement codes associated with the bid factor to the contract. It also populates the negotiated result field with the awarded bidder's bid factor response for each agreement associated with the bid factor.

- Link default clauses to bid factors on sourcing events.
- View, add, and delete event-related clauses during event creation.
- Define when a bid factor clause is included in a contract.
- Create agreements on the contract for all bid factors that are selected to include on the contract when you award a sourcing event to a contract.

The system populates the bidder's response for those factors so that you can track and measure the adherence to the terms.

- Select the type of contract when awarding to a contract.

The system creates agreements on the contract for all bid factors that are marked Include on Contract.

---

**Note:** The Strategic Sourcing application generates an awarded contract that is accessible in the Supplier Contract Management application.

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If the bid factor already has one or more associated agreements, the system populates the contract with those associated agreements. If no agreements are associated with the bid factor but the bid factor is marked as Include on Contract, the system creates an ad hoc agreement on the contract for each bid factor. The system creates the contract using one of the following contract types:

- Purchase order for creating a purchase order transaction, but not agreements on the transaction.
- General contract for creating a contract transaction with a process option of General Contract.
- Purchase order contract to create a contract transaction with a process option of Purchase Order.

- Single release purchase order contract to create a contract transaction with a process option of Single Release PO Only.

## PeopleSoft eProcurement Integration

PeopleSoft Supplier Contract Management integrates with PeopleSoft eProcurement through documents that you create based on a requisition. When you create an eProcurement requisition, a link is available that accesses the document authoring system. And, within the document authoring system, you can define the business unit and requisition to which you want to assign the document.

The intent for requisition document creation is to define a related document and wizard that captures additional information from the requester as they progress through the contract request. When a document type is setup for the contract request, you can specify that the system use the type with an eProcurement or Purchasing requisition. Along with the requisition, the requester creates a request document by launching a wizard that captures needed information pertaining to the contract request. The requester can then provide the required information in the supporting document.

When you award the requisition to a contract, the contract specialist can reference the original request document and make use of any wizard responses within that request document to help drive the content and fill in required data on the actual contract. The benefit of this process is that by the time that the contracting specialist becomes involved in the process, the requester has already been prompted for and provided much of the information up front.

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## Microsoft Word Integration with PeopleSoft Supplier Contract Management

One of the key objectives of document authoring using Supplier Contract Management is to keep the user in a native working environment as much as possible. The Supplier Contract Management application provides this environment through integration with Microsoft Word.

This release of Supplier Contract Management supports the Microsoft Office 2007, or later versions, using the Microsoft Office Open XML format. It is highly recommended that new customers use the 2007, or later version, because versions of Microsoft Word purchased after January 11, 2010 do not support a custom xml feature used within the 2003 xml format. Microsoft Word 2007, or later version, xml formats support Supplier Contract features through the use of content controls.

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**Note:** If your organization continues to use Microsoft Word 2003, please reference prior versions of PeopleSoft Supplier Contract Management documentation for setup and usage steps.

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If you are upgrading PeopleSoft Supplier Contract Management from previous releases and are using Microsoft Word 2003 XML, please see My Oracle Support, note number 1329290.1. This posting provides information about upgrading your contract library to a 2007, or later version using the Microsoft Office Open XML format. The contract library upgrade can be performed after you have upgraded to PeopleSoft Supplier Contract Management 9.1, but it is not mandatory to do this as part of your upgrade. In addition, a test upgrade should be performed in a test environment.



Microsoft Word enables you to access documents in a familiar format for viewing and editing. You use Microsoft Word to edit and preview clauses, sections, and documents using check-out and check-in procedures. You can also preview documents for binds.

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**Note:** PeopleSoft Supplier Contract Management uses Microsoft Office Open .XML format as its native working environment. In this document, all references to Microsoft Word, unless specified differently, are references to Microsoft Word 2007, or later versions.

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To integrate and author Microsoft Word documents, the PeopleSoft system uses Microsoft Word XML (Extensible Markup Language). This Microsoft Office Open XML format is available with Microsoft Word 2007 or later version, which is required for use with this release of PeopleSoft Supplier Contract Management. The system provides content controls that are extensions to Microsoft Word XML.

Using the clause library, you can optionally use Microsoft Word for editing and maintaining rich-text content in a clause. Even when you maintain the clause as plain text in PeopleSoft pages, the system stores the equivalent Microsoft Word version of the clause for later use with document generation. You can also import clauses into the clause library. Using a special set of content controls, you can define elements of a clause using content controls and import multiple clauses into the library. After the clauses are in the library, you can use them as if they were created in the document authoring system.

When the system generates a document in Supplier Contract Management, it assembles each appropriate content element from the library to create a draft version of the contract in .xml format. The system can render a .doc template version of the document when you dispatch the contract to external contacts.

When the system assembles the document during the generation process, the PeopleSoft Supplier Contract Management application enables you to define a numbered setting for the PeopleSoft content. When that setting is combined with a Microsoft Word template that contains Microsoft Word paragraph styles and outline numbering, it enables flexible, consistent, and automatic numbering, styles, and indentation of authored documents.

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**Note:** You should have a basic understanding of Microsoft Word features, such as paragraph styles and outline numbering, before you establish Microsoft Word templates and libraries.

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While you are working in the native Microsoft Word environment, you can use the Research task pane to search the PeopleSoft database for bind variables and insert them into the Microsoft Word clause you are creating or editing. You can also search the database for clauses and insert them directly into the document without having to sign in to the PeopleSoft system or exit Microsoft Word.

For more information about Microsoft Word integration with Supplier Contract Management, see [Understanding Microsoft Word Integration with Supplier Contract Management](#), and [Setting Up Document Templates and Styles](#).

## Microsoft Word Setup

System administrators and end users must perform setup procedures to use Microsoft Word saving document in compatible Word .xml format for reviewing and editing documents from the document authoring system. System administrators can also set up optional features of the system for use with Microsoft Word by defining uniform resource locators (URLs), message objects, nodes, and gateways that enable authors to search for clauses and bind variables in the PeopleSoft database from within Microsoft Word.

## Document Templates, Styles, and Formats

Microsoft Word document templates and styles enable you to manage default and custom-style templates. You use specific elements of these templates, such as paragraph styles, during document generation. The system uses the Microsoft Word template along with document configurator to determine layout, content, and style of authored documents.

See [Setting Up Document Templates and Styles](#) and [Setting Up Document Formats and Options](#).

# Setting Up PeopleSoft Supplier Contract Management

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## Understanding PeopleSoft Supplier Contract Management Setup

This topic discusses general setup information that the system uses to control the document authoring system. Using supplier contract authoring to generate documents for transactional data requires basic setup. For example, basic document authoring includes set up for:

- A database server or file-transfer program (SFTP) server directories for file storage.

Either a database server or an attachment SFTP server and its appropriate directories must be available for use by the system to store and retrieve files that are used for the clause library and authored documents. Users may consider storing attachments within the database server preferable to storing them on an SFTP server because data management is more contained in the database server. However, before choosing a database server or SFTP server, you should also consider the following:

- Are you currently using SFTP server or database server attachment setup for other products such PeopleSoft eProcurement?

If so, you would likely use the same setup for Supplier Contract Management.

- When considering database servers, consider the database platform you are running and any restrictions within the platform that depend on the expected attachment volume and database size.
- When large volumes of documents are expected consider the benefits of using SFTP servers versus database servers for Search Framework Collections.

Because Search Framework collections require the collection to be built from a saved file outside of the database, rebuilding collections using SFTP servers and a mapped server drive may perform better than extracting attachments from the database and storing them to temporary files for builds.

See [Setting Up Servers and Directories](#).

- Installation of Microsoft Office Word 2007, or later version, on workstations for users interacting with the system.

This is a minimum requirement.

See [Installing and Configuring Microsoft Word Components on Devices](#).

- A basic contract library.

You use several core setup features to provide the basis for managing the contract library and to establish basic elements of documents. For example, clause groups and libraries, and configurator

types and groups help you organize the library. Approval types and clause classes assist with document approvals.

Bind definitions, mappings, and source transaction structures enable the document authoring system to apply transactional values to clauses. You can also use these binds in rules.

For additional information about the contract library, see [Understanding the Contract Library](#) and [Contract Library Setup](#).

- Optional configurations, such as.

- Setting up Microsoft Word components on workstations.

This feature enables selected users to interact directly with the PeopleSoft database from within Microsoft Word by retrieving bind values and clause content.

- Comparing and rendering document capability.

This feature enables users to create system-generated comparisons of a current authored document to a re-created or refreshed version of the document. It also enables the rendering of the Microsoft Word .xml authored document into a Microsoft Word .doc or Adobe .pdf format. You should configure this feature if you intend to dispatch documents externally in a .doc or .pdf format versus the default .xml format that requires the use of Microsoft Word 2007, or later version.

For additional information about comparing and rendering documents, see [Setting Up Document Comparison and Rendering](#).

- Automatic numbering.

The system uses automatic numbering to automatically assign numbers to ad hoc documents, clauses, and sections. See [Setting Up Automatic Numbering](#).

- Installation options.

These setup features support a variety of processes including requiring approvals for documents and clauses, enabling document types, syndication, and document comparisons. You can also define chunking for Search Framework searches, enable transaction sources, enable cycle times, set up internal and external collaboration, and set up digital signatures. See [Installation Options - Supplier Contract Management Page](#).

- User preferences.

You use these features to define authorizations for document administrators and librarians and to delegate document authorizations to other users. See "User Preferences - Supplier Contract Management Page" (Application Fundamentals).

For information about setup issues, see [Implementation and Setup](#) and [Contract Library Setup](#).

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**Note:** PeopleSoft Supplier Contract Management uses Microsoft Word extensively for document authoring. Certain multibyte characters are in Microsoft Word that cannot be supported when you integrate with a nonmultibyte PeopleSoft database for clause content in the library. If you are not using a Unicode Standard database, you should not use these special characters. This exception applies to library setup because the system stores this content in its database. This exception does not apply to modified documents after they have been generated.

You also must set up PeopleSoft Supplier Contract Management to enable syndication, contract agreements, approvals, and searching.

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## Setting Up Servers and Directories

### Understanding Server and Directory Setup

To set up URL database or SFTP attachment servers and directories, use the "Administer File Attachments Page" (Application Fundamentals).

For supplier contract attachments, add SFTP servers if you do not already have an SFTP server defined for other Supplier Relationship Management (SRM) products, such as PeopleSoft eProcurement.

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**Note:** Setting up database and URL servers is similar except that you only add a database record name, or URL identifier, and do not set up the component directories that are specified for SFTP server setup.

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Before accessing a component in the system that stores or retrieves files, you must set up an attachment file-transfer program server and, when the server type is *SFTP*, its appropriate directories. For PeopleSoft Supplier Contract Management, attachments are stored and retrieved from the server locations that are defined on this page. See "Working with File Attachments," *PeopleTools: PeopleCode Developer's Guide*.

System administrators can add or modify the SFTP root folder and the component-specific subfolder for SFTP servers. Administrators set up the attachment server and directories to operate:

- Microsoft Word document templates.
- Clauses.
- Sections.
- Document configurator maintenance.
- Contract entry agreement attachments.
- Agreement result attachments.
- Document maintenance.

See also [Overriding SFTP Attachment Servers](#) and [Setting Up Two SFTP Attachment Servers](#).

### Component Subdirectories

Use this grid after you set up the SFTP attachment server to specify specific server subdirectories for the appropriate components. This enables you to segregate and manage files on the SFTP server as they pertain to contracts.

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**Note:** Component subdirectories are only applicable to SFTP server types, not database or URL servers.

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This table provides examples of how you can set up subdirectories. You can enter any path name for a subdirectory. You set up subdirectories for these components:

<b>Component</b>	<b>Path Example</b>	<b>Description</b>
CS_CLAUSE_DEFN	Clause	Stores clause information for Microsoft Word editing.
CS_CNT_AG_RESULT	AgreeResult	Stores contract agreement results that are attachments.
CNTRCT_ENTRY	TransContract	Stores transactional contract-entry related attachments.
CS_DOC_MAINT	AuthoredDocs	Stores generated contract documents.
CS_SECTION_DEFN	Section	Stores section information for Microsoft Word editing.
CS_TMPL_TBL	Configurator	Stores ad hoc document configurator clauses for Microsoft Word editing. See <a href="#">Setting Up Document Templates and Styles</a> .
CS_DOC_SUPP	AuthoredDocs	Stores generated contract documents. The system uses this component for the external/supply side access. The directory must match the internal directory defined for the CS_DOC_MAINT component.
CS_SS_CNT_VFY	TransContract	Stores transactional contract-entry related attachments. The system uses this component for the external/supply side access. The directory must match the internal directory defined for the CNTRCT_ENTRY component.

## Overriding SFTP Attachment Servers

You can override the attachment server defined during the installation of the PeopleSoft system. When you override the installed server, you can define and use an attachment server specifically for PeopleSoft Supplier Contract Management-related documents and attachments. You use the **Override Attachment**

**Server ID** field on the [Installation Options - Supplier Contract Management Page](#) to point to a specific attachment server ID in cases where you are currently using database server attachments in your system only for products other than PeopleSoft Supplier Contract Management. You should evaluate the need for using the SFTP Attachment Server feature during the initial setup of the product.

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**Warning!** Overriding an attachment server should be an exception and only performed when absolutely necessary. Overriding the server also affects the use of searching in PeopleSoft Supplier Contract Management. If you choose to use a database server for Supplier Contract Management the Attachment Server Override values must be left blank.

---

You can use a contract-related attachment server if you need to isolate supplier contract-related attachments from the primary attachment server that is used for all other applications. This feature is primarily intended for when you are already using the database attachment server for all other products and are ready to begin using PeopleSoft Supplier Contract Management, but you prefer the Supplier Contract Management server to be SFTP-based versus a database server. Therefore, after defining the database attachment server during system installation, you can use the **Override Attachment Server ID** field on the [Installation Options - Supplier Contract Management Page](#) to define the SFTP attachment server for use within Supplier Contract Management only.

When the installation-wide setting is set to a database server and if you are using a database server for all other types of attachments across the installation, then any other features that store attachments, other than within PeopleSoft Supplier Contract Management document pages, will continue to be stored in the database server and cannot be searched using the Search Framework. Also, if you have attachments tied to an actual purchasing transactional contract or requisitions that are part of a contract, when you create a supplier contract document tied to the transactional contract, these associated or related database attachments cannot be searched using the Search Framework pages because Supplier Contract Management searches and indexes SFTP server files only.

For more information about Search Framework pages, see [Searching for Library and Document Contents](#).

## Setting Up Two SFTP Attachment Servers

If you plan to use two SFTP attachment servers and neither one is a database type server, you can use one for the installation-wide setting and use another, unique server, for PeopleSoft Supplier Contract Management.

Follow these steps to override the installed server:

1. Access the "Administer File Attachments Page" (Application Fundamentals).
2. Set the active server to the one that you want for all other applications.

Remember the server ID for the server that you want to use for PeopleSoft Supplier Contract Management.

3. Access the [Installation Options - Supplier Contract Management Page](#).
4. In the **Override Attachment Server ID** field, select the server ID for the server that you want to use for PeopleSoft Supplier Contract Management.

When you enter a value in the **Override Attachment Server ID** field, the system displays a message indicating that the field should normally be left blank.

5. Click **Save**.
6. Enter the URL for the attachment server on the Attachment URLID list in PeopleTools > Search Framework > Administration.

After overriding the attachment server, you can continue with the PeopleSoft Supplier Contract Management setup process as you normally would.

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**Note:** This setup only applies to SFTP attachment server types. You also have the option to use a database attachment server instead of a SFTP attachment server.

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## Related Links

[Supplier Contract Management Setup Needs](#)

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## Setting Up PeopleSoft Integration Broker for Microsoft Word

These topics are discussed:

- [Understanding PeopleSoft Integration Broker Setup for Microsoft Word](#).
- [Setting Up Integration Broker to Use the Microsoft Word - Research Task Pane](#).
- [Setting Up a Clause URL to Appear in the Research Pane](#).

## Pages Used to Set Up PeopleSoft Integration Broker and Microsoft Word

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
Gateways Page	IB_GATEWAY	Configure gateways.
Service Operations - General Page	IB_SERVICE	Define and activate a service operation.
Service Operations - Handlers Page	IB_SERVICEHDLR	Activate one or more service operation handlers.
Service Operations - Routings Page	IB_ROUTINGDEFN	Define and activate routing definitions on the service operation.
Queue Definitions Page	IB_QUEUEDEFN	Set the queue used by the service operation to <i>Run</i> .
Node Definitions Page	IB_NODE	Activate the node used by the service operation.
Nodes - Connectors Page	IB_NODECONN	Verify that the node is connected to the correct network for an outbound service operation.



For additional information and to navigate to these pages, see *PeopleTools: Integration Broker*.

## Understanding PeopleSoft Integration Broker Setup for Microsoft Word

Microsoft Office Open XML integration is a core requirement of PeopleSoft Supplier Contract Management. You can use Microsoft Word 2007 or a later version supporting the Microsoft Office Open XML format to check out and edit clauses, sections, ad hoc configurator clauses, and contract documents. You should begin system setup with a Word 2007 or later version .XML template (upload).

In addition to standard editing of content with Microsoft Word, an optional, real-time integration between Microsoft Word and the PeopleSoft clause library is available. This integration enables clause librarians to search for bind variables and clauses when developing clause content. Using an optional search feature, contract specialists and collaborators can search for, locate, and retrieve binds and clauses while maintaining the authored contract.

To use Microsoft Word editing features and the Research task pane search requires that you set up workstations on local systems and define settings for PeopleSoft Integration Broker service operations. This topic describes the basic steps for setting up both systems. After activating system-supplied service operations in Integration Broker, you can install and configure Microsoft Word components on workstations to interact directly with the PeopleSoft database.

For example, if you are creating a contract clause that requires an inspection process that has been described in another clause, you do not have to navigate to and view the clause using application pages. You can use the Research task pane functionality to search for the clause directly from Microsoft Word and insert the content of the clause, or alternate clause, directly into the document that you are creating. Optionally, you can click a link that is provided for each clause from the search results, which accesses the specific clause and its details in the document authoring system.

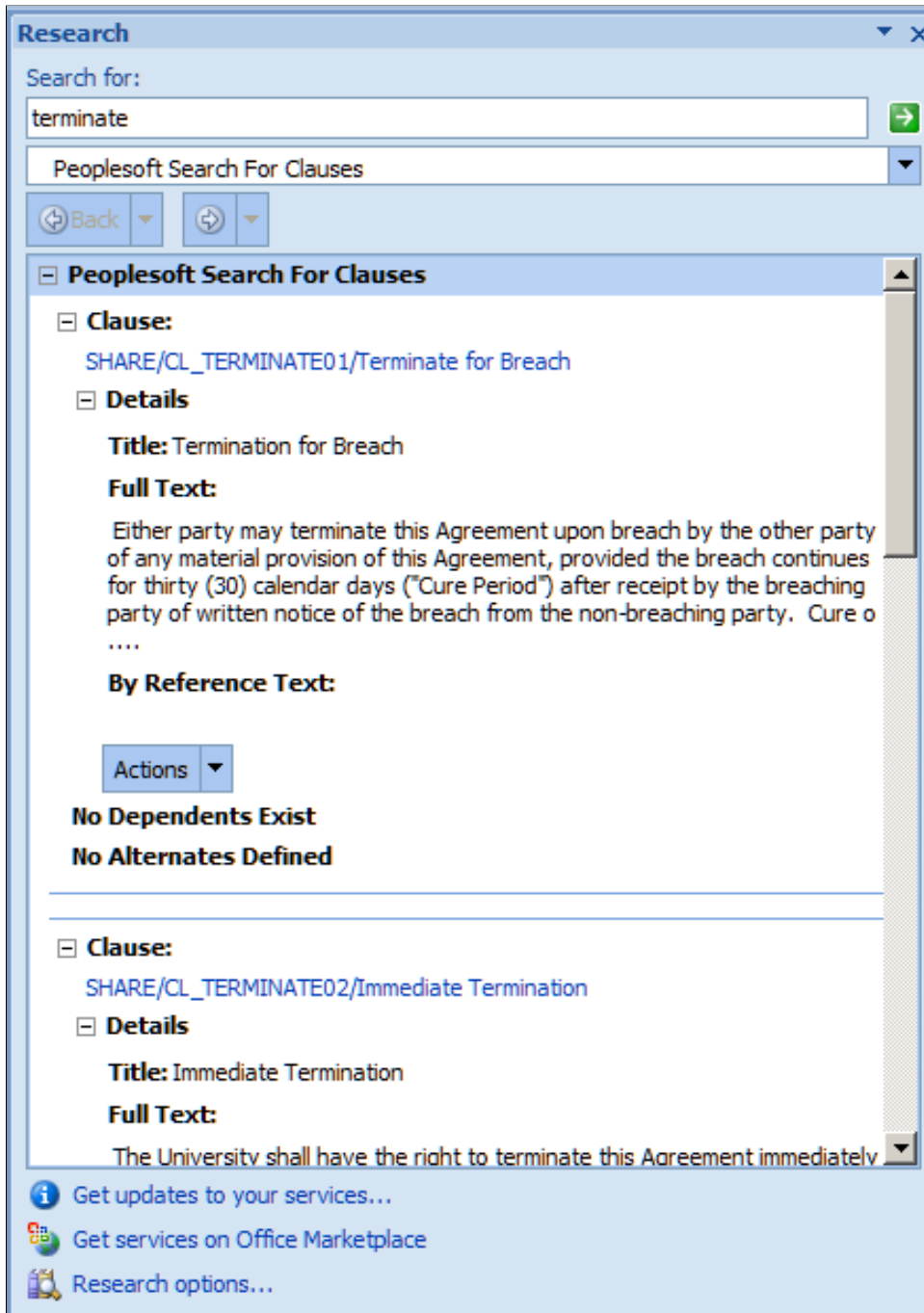
See [Installing and Configuring Microsoft Word Components on Devices](#).

### Example: Using the Microsoft Word - Research Task Pane

After you install components on a workstation, you can use the Microsoft Word - Research task pane to search for and to add binds and clauses to contract documents. In the clause search results, the system provides a URL so that you can navigate to the clause in the contract library of the PeopleSoft database.

The following example shows how the Research task pane might appear after you have performed a search for the word *terminate* in a clause ID, description, or title:

This example illustrates the fields and controls on the Example of a Microsoft Word - Research task pane.



When you search for a clause, the frame displays the first 300 plaintext characters of full text and by reference text that are defined in the clause definition. You can use the **Actions** button to insert either the formatted full text or by reference text into the document that you are maintaining.

When you search for binds, you use the **Actions** button to insert the bind value and markers where the cursor is positioned in the Microsoft Word document.

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**Note:** You can uninstall the Microsoft Word integration by running the setup.exe program again. Any time you change the settings in the configuration file, you need to uninstall and then run the install again for the new settings to take effect.

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## Setting Up Integration Broker to Use the Microsoft Word - Research Task Pane

A service operation definition consists of general information about an operation, such as its name and alias if one has been defined. It also specifies an operation type, which determines how the operation is to be processed, synchronously or asynchronously. The `CS_SEARCH_BINDS` and `CS_SEARCH_CLAUSES` are processed synchronously, meaning that the system waits for a response to the message. These two service operations allow specialists and librarians to access clauses and binds from within Microsoft Word using synchronous messages.

In addition, the service operation definition contains routings, which determine the direction, inbound or outbound, of the service operation. A service operation has one or more handlers, which contain and run the programming logic for sending or receiving the message and manipulating service operation content.

See Incoming and Outgoing Request Flows, "Understanding PeopleSoft Integration Broker," *PeopleTools: Integration Broker*.

### Steps to Set Up Integration Broker to Use the Microsoft Word - Research Task Pane

Follow these steps to prepare the system to use Microsoft Word task pane services to connect to PeopleSoft databases to search for end-user bind variables and clauses:

1. Configure the gateway if it is not already configured for the database.

The integration gateway is a platform that manages the receipt and delivery of messages that are passed among systems through PeopleSoft Integration Broker. Information defined for the gateway relates to the `config.txt` file that you update to define servers. The gateway manager maintains links to the other integration gateway components, including target connectors and listening connectors. Listening connectors invoke the gateway manager when they receive a message request.

The gateway manager invokes the appropriate target connector based on the content of the message object and waits for a reply from the target connector. When the reply is received, the gateway manager forwards the reply to the calling listening connector. PeopleSoft Supplier Contract Management delivers the `LOCAL` gateway configured to exchange information with the `PeopleSoftServiceListeningConnector` in the URLs for bind and clause searches.

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**Note:** If the gateway is not configured, the database administrator should perform this task.

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See "Managing Integration Gateways," *PeopleTools: Integration Broker*.

2. Set the `CS_SEARCH_BINDS` and `CS_SEARCH_CLAUSES` service operations to *Active*.

Oracle delivers the service operations in PeopleSoft Integration Broker with a default status of *Inactive*. You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft system, such as Supply Chain Management.

To specify messages for the service operations and to set them to an Active status:

- a. Select **PeopleTools > Integration Broker > Integration Setup > Service Operations**.
- b. Select `CS_SEARCH_BINDS` and `CS_SEARCH_CLAUSES`, alternately, in the **Service Operations** field.

- c. Click **Search**.

The service operation appears.

- d. Click the **Service Operation** link.

You specify messages for service operations in the Message Information section of the Service Operations - General page. Because the CS\_SEARCH\_BINDS and CS\_SEARCH\_CLAUSES are already available, they appear in the section. These messages define the structure of the data that is contained in the service operation. The service operation type determines the number of messages and message types (request or response) that you specify.

- e. Set the CS\_SEARCH\_BINDS and CS\_SEARCH\_CLAUSES services to *Active* using the **Active** check box in the **Default Service Operation Version** group box.
- f. Select the Handlers tab.

The page provides summary information about handlers that have been added to an operation. Two individual server processes work together to handle incoming requests. One server process functions as a dispatcher, while the other functions as a handler. You can specify an application class as a handler for a service operation. The CS\_SEARCH\_BINDS and CS\_SEARCH\_CLAUSES use an application class handler.

See "Sending and Receiving Messages," *PeopleTools: Integration Broker*.

- g. Verify that *Active* is selected in the **Status** field on the Handlers tab.
- h. Click the **Save** button.
- i. Select the Routings tab.

This page provides access to routing information that has been added to an operation. Routings determine the direction, inbound or outbound, of the service operation. The routing page is where you specify the sending and receiving node. The **Sender Node** field value should be *ANY* for both the CS\_SEARCH\_BINDS and CS\_SEARCH\_CLAUSES operations. The **Receiver Node** field value should equal the value for the database's default local node. This value appears on the Nodes page and contains *Y* in the Local Node Name column for the node.

- j. Select the **Active** check box.
- k. Click the **Save** button.

See Understanding Integration Setup, *PeopleTools: Integration Broker*.

See "Managing Service Operations," and "Setting Up Service Operations, "Implementing Integrations," *PeopleTools: Integration Broker*.

## Setting Up a Clause URL to Appear in the Research Pane

To access the Clause Definition Page from a Microsoft Word - Research task pane, you must to establish a URL that appears as the clause name. To do this, you must define a server and location for the EMP\_SERVLET URL.

To set up the URL:

1. Select **PeopleTools > Utilities > Administration > URLs**.
2. Search for the EMP\_SERVLET URL identifier.
3. Enter a partial URL in the **URL** field.

An example of the formatting appears on the page. An entry might be: *http://pfas027.peoplesoft.com:8001/psp/e900r20bnt/EMPLOYEE/*. See the example in the [Understanding PeopleSoft Integration Broker Setup for Microsoft Word](#), Example: Using the Microsoft Word - Research Task Pane topic to view how the URL appears in the Research pane.

See the Integration Broker Setup to Enable Workstation's Word Research Task Pane Searches subtopic in the [Understanding PeopleSoft Integration Broker Setup for Microsoft Word](#) topic.

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## Setting Up Document Comparison and Rendering

These topics are discussed:

- [Understanding Document Comparison and Rendering](#).
- [Setting Up Document Comparisons and Rendering](#).

## Understanding Document Comparison and Rendering

To compare and render documents, you must enable the features in the Document Compares & Rendering section on the [Installation Options - Supplier Contract Management Page](#).

- Document comparisons enable you to compare the current document to a temporarily re-created, refreshed, or last-executed document.

Last-executed documents are available only when you are working with amendments. The system compares the current document to a temporary document using the normal Microsoft Word - Compare Document feature without you accessing it through Microsoft Word. In addition, you can compare any two document versions from history for an understanding of changes between different Microsoft Word-based checked-in versions.

The resulting output document highlights the differences between the documents you chose to compare. You can use this feature to determine what the effect of doing a document refresh or re-creation would be and what changes you would lose or gain, as well as to see what changes were made to specific versions in history.

- Document rendering is the process by which the system provides files in a .doc or a .pdf format to users who do not want to use Microsoft Word to view the documents.

When the system creates XML documents, they are meant to be opened only using Microsoft Word. If suppliers do not have this version available to them or if they prefer to review the documents in a .doc or .pdf format, then you use the Installation Options page to set up information enabling the system to convert the documents from an XML format to a .doc or .pdf format.

Conversion to a .doc or .pdf format is available only as an option when you send documents to contacts or dispatch documents during the document life cycle. When you send the documents, the system converts the documents that are attached to the email to .doc or .pdf file formats.

Oracle delivers the service operations in PeopleSoft Integration Broker with a default status of *Inactive*. You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft system, such as Supply Chain Management.

Your database administrator will need to assist you with this setup. For additional information, see Incoming and Outgoing Request Flows, "Understanding PeopleSoft Integration Broker," *PeopleTools: Integration Broker*.

After completing the following steps, you can convert documents to a .doc format and compare documents using the Document Management page.

## Setting Up Document Comparisons and Rendering

To use the compare and render features, perform these steps on your Microsoft Windows device:

1. Ensure that PeopleTools is installed on a Microsoft Windows machine.

The PeopleTools installation on this machine must have the file %PSHOME%\BIN\SERVER\WINX86\CSDOCUTIL.DLL. This file enables server-side processing of Microsoft Word files.

2. Create an application server domain.
3. If you select the **Enable Rendering .doc** check box on the Installation Options - Supplier Contract Management Page, then you need to ensure that the same machine has Microsoft Word installed on it.

The CSDOCUTIL program interacts with Microsoft Word on the machine.

- If you are using Microsoft Word 2010 or a later version, then you do not need this add-in.
- If you are using Microsoft Word 2007, then you need to download a Microsoft add-in to save as a PDF or XPS.

Access this [website](#).

4. If you select the **Enable Rendering .pdf** check box on the Installation Options - Supplier Contract Management Page, then you need to select *Adobe (Word)* in the **Signature Method** field even if you do not plan to implement digital signatures.

The system relies on this option to determine whether to use Adobe Acrobat or Microsoft Word to render a PDF. You can then disable digital signatures. Otherwise, if *Adobe (Deprecated)* is selected as the **Signature Method**, the system requires Adobe Acrobat to be installed on the Windows machine.

5. Configure the Integration Gateway if it is not already configured for the database.

The integration gateway is a platform that manages the receipt and delivery of messages that are passed among systems through PeopleSoft Integration Broker. For additional information, see "Managing Integration Gateways," *PeopleTools: Integration Broker*.

6. Activate the CS\_DOC\_ACTION service operation.

This service operation is a synchronous operation and serves as the integration that handles all requests to the Document Utilities library. Using the library, the system converts documents to a .doc format and enables the comparison of documents using the Document Management page.

To activate the service operation:

- a. Select **PeopleTools > Integration Broker > Integration Setup > Service Operations**.
- b. Select *CS\_DOC\_ACTION* in the **Service Operation** field.
- c. Click **Search**.

The service operation appears in the search results.

- d. Click the **Service Operation** link.

The Service Operations page appears with the service operation definition. The definition consists of general information about an operation, such as its name and alias if one has been defined. It also specifies an operation type, which determines how the operation is to be processed, synchronously or asynchronously. The *CS\_DOC\_ACTION* operation is processed synchronously, meaning that the system waits for a response to the message. In addition, the service operation definition contains routings, which determine the direction, inbound or outbound, of the service operation. A service operation has one or more handlers, which contain and run the programming logic for sending or receiving the message and manipulating message content.

See Incoming and Outgoing Request Flows, "Understanding PeopleSoft Integration Broker," and "Managing Service Operations," *PeopleTools: Integration Broker*.

- e. Ensure that the **Active** check box is selected in the **Default Service Operation Version** group box.

If the version that you want is not the default version for the service operation, the default version must also be activated.

- f. Select the **Handlers** tab.

The page provides summary information about handlers that have been added to an operation. Two individual server processes work together to handle incoming requests. One server process functions as a dispatcher, and the other functions as a handler. You can specify an application class as a handler for a service operation. The *CS\_DOC\_ACTION* uses an application class handler. For additional information, see "Sending and Receiving Messages," *PeopleTools: Integration Broker*.

- g. Ensure that *Active* is selected in the **Status** field on the **Handlers** tab.
- h. Click the **Save** button.

7. Complete the fields in the **Document Compares & Rendering** section on the [Installation Options - Supplier Contract Management Page](#).

## Installing and Configuring Microsoft Word Components on Devices

After you set up the messages and the integration gateway, you can optionally install and configure Microsoft Word for use with task panes, including the Research task pane for bind and clause searches. This is typically set up for contract administrators who want to access the clause library from within Microsoft Word.

In addition, if you intend to enable digital signatures using Adobe PDF format, each contract administrator who needs to prepare, sign, and enable signature rights for others to sign a document using the Adobe Reader must have Adobe Acrobat installed on their device.

### Installing Web Services for Microsoft Word

Oracle delivers setup files on the product installation CD that are necessary for this integration. A setup directory containing files for installing and configuring Microsoft Word is available on the CD when you follow this path: setup\SupplierContractMgmt\eng. You can copy the files from this folder to each device, or you can run the setup executable file directly from the CD after you have edited the settings in the configuration file (config.txt).

---

**Note:** You can install the CD to the path you choose.

---

This setup utility must be run on the device of each user who wants to use the Microsoft Word task pane integration with PeopleSoft Supplier Contract Management. Normally, this is the contract specialist. The setup files add information to the registry that is specific to Microsoft Word, which shows up as two additional Microsoft Word - Research task pane services. Within Microsoft Word, you can enable the Research task pane by pressing the **Alt** key and clicking the mouse. You can also access the page by selecting the Review tab, and then selecting the Research button using Microsoft Word 2007 or later version.

After the setup is complete, when you open the Research task pane, the drop-down menu displays the search values *PeopleSoft Search For Clauses* and *PeopleSoft Search for Binds*.

To enable this functionality, you must update the config.txt file in the directory before you run the setup.exe program. The config.txt file contains information that needs to correspond to the PeopleSoft environment configuration and version of Microsoft Word being used. Uniform resource locators (URLs) that are listed in the file need to point to the machine name of the gateway that has been configured for the database for messaging. In addition, you need to update the URLs to contain the corresponding default local node for the database. The config.txt file contains <> markers that indicate what you need to update. Update these URLs:

```
ClauseQueryPath=http://<insert server name here>
/PSIGW/PeopleSoftServiceListeningConnector?From=PSFT_XINBND
&To=<insert default local node here>
&MessageName=CS_SEARCH_CLAUSES&MessageVersion=VERSION_1
ClauseServiceName=Peoplesoft Search For Clauses
```

```
BindQueryPath=http://<insertserver name here>
/PSIGW/PeopleSoftServiceListeningConnector?From=PSFT_XINBND
&To=<insert default local node here>&MessageName=
CS_SEARCH_BINDS&MessageVersion=VERSION_1
BindServiceName=Peoplesoft Search For Bind Variables
```



Here is an example of how the URLs appear after you insert the machine name for the gateway and the default local node:

```
ClauseQueryPath=http://ple-machine/PSIGW/PeopleSoftServiceListeningConnector?From=
PSFT_XINBND&To=PSFT_EP&MessageName=CS_SEARCH_CLAUSES&MessageVersion=VERSION_1
```

```
BindQueryPath=http://ple-machine/PSIGW/PeopleSoftServiceListeningConnector?From=
PSFT_XINBND&To=PSFT_EP&MessageName=CS_SEARCH_BINDS&MessageVersion=VERSION_1
```

Another parameter in the config.txt file that needs to be verified and updated, if necessary, is the version number for Microsoft Word. Use 12.0 for Microsoft Word 2007 and use 14.0 for Microsoft Word 2010. Here is an example of the version setup for Microsoft Word 2007 client usage of the research pane integration:

```
;For Word 2007 use 12.0
;For Word 2010 use 14.0[WordVersion]
Version=12.0
```

Use the Gateways page to set up and define the gateway. To access the page, select **PeopleTools > Integration Broker > Configuration > Gateways**.

While you must update the machine name for the server and default local node (the to parameter) in the config.txt file, you need to change the PSFT\_XINBND node only if you want to change the node to be another external node. The from node can be any external node.

The following labels in the config.txt file appear in the Microsoft Word - Research task pane as the service names. You can change the labels.

```
BindServiceName=Peoplesoft Search For Bind Variables
ClauseServiceName=Peoplesoft Search For Clauses
```

---

**Note:** When you are working with Microsoft Word, you do not need to be signed in to a database; however, the gateway for the database to which the config.txt file points must be running. If it is not running, the search does not produce results. The system uses a synchronous message to which it posts the request in the Research task pane and the reply is a message with any clauses or binds in it.

---

After updating the config.txt file:

1. Disseminate all files in the setup directory to user machines for configuration and complete the remaining steps on each machine.
2. Close all instances of Microsoft Word.
3. Run the setup.exe program.
4. Define the folder where you want to store the .dll file that you use to integrate PeopleSoft Supplier Contract Management with Microsoft Word.
5. Open a version of Microsoft Word 2007 or later version.
6. Using Microsoft Word, select **Tools** and then select **Research**.  
The Research frame appears on the left side of the window.
7. Enter a string or word in the **Search for** field.

When searching for a clause value, the system searches through the clause IDs, descriptions, and titles. When searching for binds, the system searches through bind names and descriptions. The search is not case-sensitive.

---

**Note:** When running on Oracle and MSS database platforms, the search also searches the full text field.

---

8. Select a value from the list that is below the **Search for** field.

Select *PeopleSoft Search for Bind Variables* to search for binds.

Select *PeopleSoft Search for Clauses* to search for clauses.

---

**Note:** These values are delivered by PeopleSoft; however, you can change them in the config.txt file.

---

9. Click the button with the green arrow to initiate the search.

The button changes to red as the system performs the search. When the search is complete, the system displays the results of the search in the Research frame. All results that meet the search criteria appear in the frame.

---

**Note:** Due to client processing size limitations, the system returns only the first 20 clauses that meet the search criteria. If more than 20 clauses meet the search criteria, the system displays a message at the top of the results that indicates that only the first 20 results appear.

---

## Setting Up Installation Options for PeopleSoft Supplier Contract Management

To set up installation options, use the Installation Options component (INSTALLATION\_CS).

### Page Used to Set Up Installation Options for PeopleSoft Supplier Contract Management

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Installation Options - Supplier Contract Management Page</u>	INSTALLATION_CS	Define installation options for PeopleSoft Supplier Contract Management.

### Installation Options - Supplier Contract Management Page

Use the Installation Options - Supplier Contract Management page (INSTALLATION\_CS) to define installation options for PeopleSoft Supplier Contract Management.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Installation Options.** Click the **Supplier Contract Management** link on the Installation Options page.

**Set Up Financials/Supply Chain >Install >Installation Options.** Click the **Supplier Contract Management** link on the Installation Options page.

Installation Options - Supplier Contract Management page (1 of 3)

Installation Options		Supplier Contract Management	
<b>Server Path</b>			
Application Server Path	<input type="text"/>	Enter Application server temporary directory. E.g. c:\temp	
<b>Document Compares &amp; Rendering</b>			
	<input checked="" type="checkbox"/>	Enable Compare Functionality	
	<input checked="" type="checkbox"/>	Enable Rendering .doc	
	<input checked="" type="checkbox"/>	Enable Rendering .pdf	
Compare/Render Server/Path	<input type="text"/>	Enter windows server temporary directory e.g. c:\temp	
Compare/Render Server URL	<input type="text" value="/slic00rry:9000"/>	Enter windows server URL with port # e.g. //machinename:9000	
<input type="button" value="Verify Server Setup"/>			
<b>Search Parameters</b>			
Search Content Chunk Size	<input type="text"/>		
*Workbench Search Method	Real Time Searching		
Contract Workbench Display Rows	<input type="text" value="20"/>		

Installation Options - Supplier Contract Management page (2 of 3)

<b>Processing Options</b>	
<input type="checkbox"/>	Allow Contract Syndication
<input type="checkbox"/>	Syndicate Contract Defaults
<input type="checkbox"/>	Syndicate Miscellaneous Charge
<input type="checkbox"/>	Syndicate Milestones
<input type="checkbox"/>	Syndicate Shipping Schedules
<input type="checkbox"/>	Syndicate Distributions
Subscriber Node	<input type="text"/>
<input checked="" type="checkbox"/>	Protect Bind Values in Document
<input checked="" type="checkbox"/>	Use Track Changes In Word
<input checked="" type="checkbox"/>	Enforce clause protection during check in
<input checked="" type="checkbox"/>	Update Version and Amendment Binds
<input checked="" type="checkbox"/>	Use Document Type
<input checked="" type="checkbox"/>	Use with PO Requisition
Log at Document Generation	Log Warnings and Wizard
Override Attachment Server ID	<input type="text"/>
Document Retention Option	Keep All Versions
External History Settings	View All Documents and Details
Notify When Available Template	DocumentNotifyWhenAvailable
<b>Enabled Transactional Sources</b>	
<input checked="" type="checkbox"/>	Purchasing Contract
<input checked="" type="checkbox"/>	Purchase Order
<input checked="" type="checkbox"/>	Sourcing Event

Installation Options - Supplier Contract Management page (3 of 3)

**▼ Cycle Time Settings**

Enable Cycle Time

Business Calendar: 01 Standard Business Calendar

\*Complete When Status is: Executed/Complete

Target Cycle Time per Document (days): 5

Target Cycle Time per Amendment (days): 3

**Status Indicators for Documents**

Red: Number of Days Prior to Due Date: 1

Yellow: Number of Days Prior to Due Date: 2

**Status Indicators for Amendments**

Red: Number of Days Prior to Due Date: 1

Yellow: Number of Days Prior to Due Date: 2

Enable External Collaboration

**▼ Collaboration**

**Internal Collaboration**

\*Notifications: Email and Worklist

Routing Template: DocumentCollabReview

Done Template: DocumentCollabComplete

Cancel Template: DocumentStopCollab

**External Collaboration**

Notifications: Email and Worklist

Routing Template: DocumentExternalCollabReview

Done Template: DocumentExternalCollabComplete

Cancel Template: DocumentStopExternalCollab

**▼ Approvals and Signatures**

Clause Approval

Document Approval

Document Reapproval After Edit

---

Enable Signatures

Signature Method: DocuSign

Use this page to define servers, server paths, compare and render options, search parameters, syndication options, and required approvals.

**Server Path**

Use this group box to define default server locations for use in the file creation processes within PeopleSoft Supplier Contract Management.

<b>Field or Control</b>	<b>Description</b>
<b>Application Server Path</b>	<p>Enter a directory that is on the server where the system creates temporary server-side files. For example, when the system generates authored documents, it uses this temporary document on the application server to create the file prior to transferring it to the file attachment server. You might want to select a directory such as <code>c:\temp</code>, which exists on Windows application servers.</p> <hr/> <p><b>Note:</b> The temporary directory should be operating-system specific if a single operating system is being used in the implementation for all application servers. If multiple operating-system application servers are in the implementation, for example, Unix and Windows, you should leave this field blank.</p> <hr/>

## Document Compares and Rendering

Use this section to enable server-side Microsoft Word processing. This includes comparisons of the current authored document with a temporarily created version of a refreshed or re-created document. After you enable server-side processing, the system makes a **Compare** button available on the Document Management page.

Optionally, you can also create a Microsoft Word .doc or Adobe .pdf version of the XML-generated documents to send to suppliers who may be using a version of Microsoft Word that is prior to the Microsoft Word version that is on your system. After you enable rendering, the system displays the correct rendering options on the Send to Contacts and Dispatch to Contacts pages. You can test the URL and gateway settings to verify that they are correct and running.

For additional information about document comparisons and rendering, see [Setting Up Document Comparison and Rendering](#).

<b>Field or Control</b>	<b>Description</b>
<b>Enable Compare Functionality</b>	Select to permit the document administrator to run a server-side comparison of the current authored document against a recreated version or refreshed version of the document. The comparison displays the differences and is for information purposes only. The compare functionality also enables the system to compare a main amended contract with the last executed version.
<b>Enable Rendering .doc</b>	Select to permit the generation of a .doc format document when dispatching a document or sending it to contacts. You select this check box in case a supplier does not use the same version of Microsoft Word that your organizations uses and cannot read an .xml version of the file.

<b>Field or Control</b>	<b>Description</b>
<b>Enable Rendering .pdf</b>	Select to permit the generation of an Adobe .pdf format document when dispatching a document or sending it to contacts.
<b>Compare/Render Server/Path</b>	<p>Enter a directory path name for the Windows application server that serves as a temporary location for document processing for server-side comparisons and document rendering of .xml documents. An example of a temporary location might be c:\temp.</p> <hr/> <p><b>Note:</b> If a single operating system is being used in the implementation for all applications servers, then the temporary directory should be operating-system specific. If multiple operating-system application servers are in the implementation (for example, Unix and Windows), then leave the <b>Application Server Path</b> field blank on the Installation Options page.</p>
<b>Compare/Render Server URL</b> (compare/render server uniform resource locator)	<p>Enter the machine name of the Windows application server and port that have been set up with Microsoft Word and the CSDOCUTIL.DLL file. The <b>Compare/Render Server URL</b> field does not require a web server. This communication is within PeopleTools and messaging is at the application-server level. The request from the application is sent to the application server specified by the URL.</p> <p>The machine and port are passed as parameters using an internal synchronous message that is interpreted by PeopleTools and ensures that the request is run on the Windows machine where Microsoft Word or Adobe Acrobat is installed so that the comparison or rendering to .doc or .pdf can take place.</p> <p>The port is the Jolt Server Listener port and should be the same port that was set up with the PeopleSoft application server on the Windows machine.</p>

<b>Field or Control</b>	<b>Description</b>
<p><b>Verify Server Path</b></p>	<p>Click to test the render feature. When you test rendering in DOC or PDF, the system verifies that the application server that you entered in the <b>Compare/Render Server URL</b> field and the gateway are set up correctly and running. The system tests for document rendering setup for Microsoft Word and Adobe PDF formats if those check boxes are selected. The testing assists with establishing the compare and render features for the Document Management component, such as document comparisons, dispatch formats, and digital signatures.</p> <p>During the testing, the system provides information messages related to the server connection. For example, if the <b>Compare/Render Server URL</b> field is blank, a message appears indicating that data was not found in the field.</p> <p>When the test is complete and successful, the system displays this message if rendering check boxes in the Document Compares and Rendering section are selected: "Connect to application server (<i>SERVER NAME</i>): SUCCESSFUL, Test to render document in .doc format: PASSED, Test to render document in PDF: PASSED." The button name is then updated to <b>Setup is Successful</b>, which you can use to test the connection at anytime.</p> <hr/> <p><b>Note:</b> Upon successful testing of each of the features, the system saves the data that you entered.</p> <hr/> <p>Other conditions for test results include:</p> <ul style="list-style-type: none"> <li>• If the local gateway is not set up, a system error appears with the failure information.</li> <li>• If a response is not received from the gateway, the system provides a message.</li> <li>• If the application server specified by Compare/Render Server URL is not running, a system error appears.</li> <li>• If the Enable Compare Functionality, Enable Rendering .doc, or Enable Rendering .pdf check box is selected, and you enter an incorrect URL, the system times out.</li> </ul>
<p><b>Setup is Successful</b></p>	<p>Click to test the compare and render features again. This button appears after an initial test has been successful. You can use the button to retest the features, for example if you click the Enable Rendering .doc, the system will verify that the rendering setup is correct and running.</p>

## Search Parameters

Use this section to specify search options when using PeopleSoft Search Technology to perform content searches on elements in the library. For example, you can search clauses and sections, the latest versions contract document content, and transactional-related contract data for purchasing contracts.

<b>Field or Control</b>	<b>Description</b>
<b>Search Content Chunk Size</b>	<p>Enter the number of returned rows that you want to retrieve and display when you perform a search. If you do not enter a value, the system retrieves 20 rows at a time.</p> <hr/> <p><b>Note:</b> This applies to the Search Content function in Supplier Contracts.</p>
<b>Workbench Search Method</b>	<p>You can do either real-time or keyword searches based on the settings on the Installation page.</p> <p>Select <i>Real Time Searching</i> to employ the SQL based where-used search method on the Supplier Contract Workbench.</p> <p>Select <i>Search Engine</i> to employ the PeopleSoft Search Framework search method on the Supplier Contract Workbench.</p>
<b>Contract Workbench Display Rows</b>	<p>Enter a numerical value that tells the system how many rows to display when viewing results in the Supplier Contract Workbench.</p> <hr/> <p><b>Warning!</b> Use caution when entering this value. A number that is too high may impact system performance.</p>

## Processing Options

Use this group box to determine system processing options for purchasing contract syndication and document preferences on various features. Syndication is the exchange of contract information between PeopleSoft contracts and third-party systems. Using syndication, the system publishes contract information from PeopleSoft Purchasing contracts to third-party systems. This enables the third-party system to create the contract. Using syndication, the system can also receive and consolidate contract performance information from third-party systems.

The syndicate options control additional information that the system might publish with the contract. Depending on the capabilities of the remote system and the consistency of setup data between the two systems, you may not want to syndicate this optional information.

The default value for all check boxes in this group box is deselected. See [Understanding Contract Syndication](#).



<b>Field or Control</b>	<b>Description</b>
<b>Allow Contract Syndication</b>	<p>Select to indicate that you want to include syndication as part of the contract process. When you select this check box, the system shows the Syndication tab on the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information).</p> <p>If you use contract syndication and the <b>Allow Contract Syndication</b> check box is deselected later, the syndication features appear only for contracts that have already been syndicated. For contracts that have not been syndicated, the system hides the syndication features.</p>
<b>Syndicate Contract Defaults</b>	Select to include purchase order defaults as part of the syndicated contracts. The defaults include header and shipping information. To view these defaults, click the <b>PO Defaults</b> link on the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information).
<b>Syndicate Miscellaneous Charge</b>	Select to include miscellaneous charges in the syndicated contract. You can add miscellaneous charges to purchase orders in addition to sales taxes, use taxes, and value-added taxes. Miscellaneous charges can include freight, setup costs, insurance, and a variety of other costs that are incurred to deliver purchased goods to a location.
<b>Syndicate Milestones</b>	Select to include milestone information in syndicated contracts. Milestones are points in a contract cycle, such as a specified period of time or a percentage of contract fulfillment, at which an approval or reevaluation is made by contract participants. Often, partial compensation is linked to a milestone. PeopleSoft Supplier Contract Management verifies the release of milestone lines for merchandise amount changes.
<b>Syndicate Shipping Schedules</b>	Select to include syndicated shipping schedules in syndicated contracts . The system verifies that the line quantity on the shipping template is greater than the minimum line quantity.
<b>Syndicate Distributions</b>	Select to include syndicated distributions in syndicated contracts. During syndication, the system processes distribution percentages and amounts, and verifies that the distribution amount does not exceed the contract line amount.

<b>Field or Control</b>	<b>Description</b>
<b>Subscriber Node</b>	<p>Select a default node to which contracts can be syndicated. The system cannot syndicate a contract until you define a subscriber node. This subscriber node is supplied as a default value on the supplier contract if <b>Allow Contract Syndication</b> has been selected.</p> <p>If a node is not defined at the header level, the system generates a message during processing. If you run syndication as a batch process, only those contracts that have nodes defined can be selected for processing.</p>
<b>Protect Bind Values in Document</b>	<p>Select to protect bind values in a document. When you protect bind values and the system generates authored documents, Microsoft Word places a protection tag around each transactional or wizard bind value in the document. This can be useful if you do not want bind values to be readily changed within an authored document, but you do want them to be primarily controlled by wizard or transactional changes within the PeopleSoft system.</p> <p>When Microsoft Word protection is in place, bind values cannot be easily changed. Controls for overriding protection exist within Microsoft Word. For more information about protecting documents, see Microsoft Word - Help.</p>
<b>Use Track Changes in Word</b>	<p>Select to make <b>Track Changes</b> the default option when the system generates documents. If you do not select this check box, users can manually set the Track Changes feature in Microsoft Word.</p>
<b>Enforce clause protection during check in</b>	<p>Select to indicate that the system should protect clauses. This places Microsoft Word protection tags around a specific clause to help prevent users from making any changes to the clause. When you select the check box, the system prevents a document from being checked in if any of its protected clauses have been changed by users within Microsoft Word.</p> <p>If you do not select this check box, the system displays a warning about a protected clause that has been modified; however, it allows the document to be checked in.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Update Version and Amendment Binds</b>	<p>Select to indicate that the system should automatically update version and amendment bind values, if they exist, within an authored contract document. The update is performed as part of checking in, re-creating, or refreshing a document or when creating amendments.</p> <p>If you do not select this check box, the system does not automatically update any version or amendment bind values within an authored contract document.</p>
<b>Use Document Type</b>	<p>Select to indicate that you want to categorize document types for contract documents. Document types enable you to categorize documents and enables additional functionality within the system. When you select this check box, all new documents that are created in the system will require a document type value to be specified.</p> <p>Using document types, you can define specific settings, defaults, and security that provide better control over the flow of document creation and document life cycles.</p> <p>When you select this check box, the system also makes the <b>Use with PO Requisition</b> check box available.</p> <p>See <a href="#">Setting Up Document Types</a>.</p>

<b>Field or Control</b>	<b>Description</b>
<p><b>Use with PO Requisition</b> (use with purchase order requisition)</p>	<p>Select this check box if you intend to create documents related to requisitions that require new contracts. In this scenario, you can define a related document and wizard that capture additional information from the requestor. This information can be pulled into the actual purchasing contract document when it is created. Selecting this check box enables you to set up document types that allow this association to requisitions.</p> <p>When a document type is set up for the contract request situation, you can specify that the system use this type with a PeopleSoft eProcurement or Purchasing requisition. In this case, along with the requisition, the requestor can generate a supplemental request document by launching a wizard that captures the information that pertains to the contract request. The requestor then provides the required information in the supporting document. When the requisition is awarded to a contract, the specialist can reference the original request document and make use of any wizard responses within that request document to help drive the content and fill in required data for the actual contract.</p> <p>When this option is selected, the system displays the <b>Add Request Document</b> link on Maintain Requisitions page in Purchasing and on the Create Requisition page in eProcurement .</p> <p>The default value for the check box is deselected. You must select the <b>Use Document Type</b> check box before you can select this option because the Use with PO Requisition feature is enabled on the <u>Document Type Page</u>.</p> <p>If you clear the field, the system validates that no document types are currently enabled for use with purchase order requisitions. If document types are enabled, an error message appears when you attempt to save the update.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Log at Document Generation</b>	<p>Select the default method by which you want the system to log errors when it generates a document. The system provides the value as a default value to document configurators when you first create them. Two levels of logging are available. Select <i>Details</i> to indicate that the system should log full error details during the document generation process. Full logging can slow the generation process, but is useful for debugging and testing wizard paths when you create new configurators. Full logging also validates bind variables that the system uses within a configurator and validates the expansion of a configurator by checking rules that are evaluated during document generation.</p> <p>Select <i>Log Warnings and Wizard</i> to log only warnings, such as missing bind values and the summary wizard history for a given document generation. You should use this setting after a configurator is made available for general use.</p>
Override Attachment Server ID	<p>Select an attachment server ID. You use this field to override the installed server so that you can define an attachment server specifically for PeopleSoft Supplier Contract Management-related documents and attachments. When you select another server, the system displays a warning message about overriding the installed server.</p> <hr/> <p><b>Warning!</b> Overriding an attachment server should be an exception and only performed when absolutely necessary. Overriding the server also affects the use of searching in PeopleSoft Supplier Contract Management. If you choose to use a database server for Supplier Contract Management the Attachment Server Override values must be left blank.</p> <hr/> <p>See <a href="#">Setting Up Document Comparison and Rendering</a> and <a href="#">Overriding SFTP Attachment Servers</a>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Document Retention Option</b>	<p>Select a document retention option to indicate how you want the system to retain executed documents. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Keep All Versions:</i> Select to keep all versions of a document after the document is executed. Document history will continue to provide links to all intermediate versions.</li> <li>• <i>Keep Only Executed Versions:</i> Select to purge all intermediate versions from the system after the document is executed. During a new document cycle, all versions are accessible until the document is executed. After the document is executed, the system purges all intermediate versions from the system and from the SFTP server. This includes intermediate collaboration copies and intermediate signed copies. Only the final executed version remains in the system.</li> </ul>
<b>External History Settings</b>	<p>Select an option that determines the view access for external users of the Supplier Portal. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Disable Viewing once Executed:</i> Select to prevent external suppliers from viewing the executed contract in the Supplier Portal. This assumes that the supplier has an internal copy for reference because they were the last signers. Or, you can send them the signed version.</li> <li>• <i>View All Documents and Details:</i> Select to provide supplier view access to all document details including their collaboration versions, attachments, and all versions that were previously executed.</li> <li>• <i>View Only Executed Documents:</i> Select to provide external suppliers with only view access to the final signed and executed document after each negotiation is completed. This option displays summary action and history rows, but does not include review and collaborations details.</li> </ul>
<b>Notify When Available Template</b>	<p>Select a notification template that is used with the <b>Notify Me</b> button on the <a href="#">Document Management Page</a>. The <b>Notify Me</b> button is used to indicate that the system should notify you when a document is checked back into the PeopleSoft system. When the document is checked in, the system notifies any users who have asked to be notified for the document.</p>

## Enabled Transactional Sources

Use this section to define whether PeopleSoft Supplier Contract Management users can author contracts using purchasing contracts or the purchase orders in the PeopleSoft Purchasing application.

When you select a check box, the system includes that selection in the list of values for source transactions, such as when you add a document or a document type. You can also perform Search Framework searches based on the transactional source that you select. You do not need to enable the ad hoc source because it is always available.

<i>Field or Control</i>	<i>Description</i>
<b>Purchasing Contract</b>	Select to enable document creation from a transactional purchasing contract using the Contract Entry feature in PeopleSoft Purchasing. The default value for the check box is selected. See <a href="#">Transactional Purchasing Contracts</a> .
<b>Purchase Orders</b>	Select to enable document creation or association with transactional purchase orders in PeopleSoft Purchasing. The default value for the check box is deselected. See <a href="#">Transactional Purchase Orders</a> .
<b>Sourcing Event</b>	Select to enable document creation or association with transactional sourcing events in PeopleSoft Strategic Sourcing. The default value for the check box is deselected.

## Cycle Time Settings

Use this section to define cycle-time settings for completing contract documents and amendments. For example, you can ensure that contract requirements are achieved in a timely manner by establishing a time frame for completing documents. The settings that you define on this page apply to this installation of PeopleSoft Supplier Contract Management; however, you can override these settings for specific document types using the Document Type feature.

You can also set the number of days before the target cycle time that you want the system to display indicators. Use the **Red: Number of Days Prior to Due Date** and **Yellow: Number of Days Prior to Due Date** fields to set the indicators for documents and amendments.

After defining cycle settings, you use the Find Existing Documents page to search for and access documents. Using the results from document searches, you can view which documents and amendments are overdue or pending for collaboration and for approvals. You can also search for documents based on their cycle-time settings using the workbench.

<b>Field or Control</b>	<b>Description</b>
<b>Enable Cycle Time</b>	<p>Select to indicate that cycle times should be enabled for this installation of PeopleSoft Supplier Contract Management.</p> <p>After you select the check box, the system makes the related fields available.</p>
<b>Business Calendar</b>	<p>Select the business calendar that you want to use for document and amendment cycle times. You use business calendars to determine the days, such as holidays or weekends, that should be removed from any cycle-time calculations. You can also create a calendar specifically for use with documents. To define a business calendar, select <b>Set Up Financials/Supply Chain &gt; Common Definitions &gt; Calendar/Schedules &gt; Business Calendar &gt; Business Calendar</b>.</p>
<b>Complete when Status is</b>	<p>Select the status at which you want to stop tracking a document's cycle time. For example, you might want to track document cycles during more critical stages when numerous reviewers or approvers are involved in the cycle and not track it for its entire review cycle. Or, the organization might want to track a critical contract document until it has been signed and executed.</p> <p>You can end document and amendment cycle tracking at these statuses:</p> <ul style="list-style-type: none"> <li>• <i>Approved</i></li> <li>• <i>Dispatched</i></li> <li>• <i>Executed/Complete</i></li> <li>• <i>Pending Approval</i></li> </ul>
<b>Target Cycle Time per Document (days)</b>	<p>Enter the target number of business days that a contract document should take to complete. This cycle begins when you create the document and ends when the document goes into the status that you select in the <b>Complete when Status is</b> field. The system calculates the cycle time using the business calendar so that only official business days are counted based on the calendar.</p>
<b>Target Cycle Time per Amendment (days)</b>	<p>Enter the target number of days that a contract amendment should take to complete.</p>



<b>Field or Control</b>	<b>Description</b>
<b>Red: Number of Days Prior to from Due Date</b>	<p>Enter the number of days prior to the due date that you want to flag the document with a red flag indicator. When a document falls within the number of days that you enter, the system inserts a red flag indicator on the search results for the Find an Existing Document page. For example if you enter 2 for a document with a due date of March 10, depending on the business calendar, the system inserts the flag on March 8.</p> <p>You use this field to define a more urgent warning, so the number of days that you enter should be fewer than the days that you enter for the yellow flag indicator. You can define the value for documents and amendments.</p>
<b>Yellow: Number of Days Prior to Due Date</b>	<p>Enter the number of days prior to the due date that you want to insert a yellow flag indicator in the document workbench. You can define the value for documents and amendments.</p>

## Internal Collaboration

Use this section to define internal and external collaboration settings. Internal and external collaboration are similar; however, with external collaboration, you must set up external users so that they can access documents.

<b>Field or Control</b>	<b>Description</b>
<b>Notifications</b>	<p>Select the method that the system should use to notify internal collaborators that a document has been routed to them for collaboration. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Email</i>: Select to notify collaborators using email only.</li> <li>• <i>Email and Worklist</i>: Select to notify collaborators using both email and worklist methods.</li> <li>• <i>None</i>: Select to indicate that a notification is not required.</li> <li>• <i>User Preference</i>: Select to use the method defined on a user's preference.</li> <li>• <i>Worklist</i>: Select to notify collaborators using worklist only.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Routing Template</b>	Select the generic template that the system should use in routing documents for internal collaboration. This template controls the format of information for email notifications when the system routes a document for collaboration. The <i>DocumentCollabReview</i> system-supplied value appears as the default value for the template. See Defining Generic Templates, "Using Notification Templates," <i>PeopleTools: Workflow Technology</i>
<b>Done Template</b>	Select the template that the system should use when internal collaboration has been completed for a document. The template controls the information that appears in the email to the administrator when the collaboration cycle is complete. The <i>DocumentCollabComplete</i> system-supplied value appears as the default value for the Done template.
<b>Cancel Template</b>	Select the template that the system should use to alert any pending collaborators when internal collaboration has been canceled for a document. The <i>DocumentStopCollab</i> system-supplied value appears as the default value for the Cancel template.

## External Collaboration

<b>Field or Control</b>	<b>Description</b>
<b>External Collaboration</b>	<p>Select to enable external collaboration with suppliers who have access to PeopleSoft Supplier Contract Management documents through the Supplier Portal. To perform external collaboration, Oracle recommends that supplier users use the same Microsoft Word version that your organization uses. This ensures that suppliers can make changes and check in the document as an .xml document. If suppliers do not use the same Microsoft Word version, they can check in a .doc version of the document, but the contract administrator will have to manually reconcile any changes.</p> <hr/> <p><b>Note:</b> You must enable external collaboration using this check box before you can enable them for a document type on the Document Type page.</p> <hr/> <p>See Document Collaboration for External Users in the <a href="#">Understanding Document Collaboration</a> topic.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Notifications</b>	<p>Select the method that the system should use to notify external collaborators when they are listed as collaborators in the document collaboration process. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Email</i>: Select to notify collaborators using email only.</li> <li>• <i>Email and Worklist</i>: Select to notify collaborators using both email and the worklist.</li> <li>• <i>None</i>: Select to indicate that a notification is not required.</li> <li>• <i>User Preference</i>: Select to use the method defined on the user's preference.</li> <li>• <i>Worklist</i>: Select to notify collaborators using worklist only.</li> </ul>
<b>Routing Template</b>	<p>Select the generic template that the system should use in routing documents for external collaboration. This template controls the format of information for email notifications when the system routes a document for external collaboration. The <i>DocumentExternalCollabReview</i> system-supplied value appears as the default value for the template. See Defining Generic Templates, "Using Notification Templates," <i>PeopleTools: Workflow Technology</i>.</p>
<b>Done Template</b>	<p>Select the template that the system should use when external collaboration has been completed for a document. The template controls the information that appears in the email to the administrator when collaboration is complete. The <i>DocumentExternalCollabComplete</i> system-supplied value appears as the default value for the Done template.</p>
<b>Cancel Template</b>	<p>Select the template that the system should use to alert the external collaborator when an external collaboration cycle has been canceled for a document. The <i>DocumentStopExternalCollab</i> system-supplied value appears as the default value for the Cancel template.</p>

## Approvals and Signatures

Use this section to indicate whether workflow approvals are required for clauses and documents, and whether internal and external users can electronically sign a document.

<b>Field or Control</b>	<b>Description</b>
<b>Clause Approval</b>	<p>Select to indicate that approvals are required for clauses. When you select this check box, the system enables workflow approvals for clauses. If you do not select this check box, the person maintaining the clause can set the clause status to approved.</p> <p>See <a href="#">Understanding PeopleSoft Supplier Contract Management Workflow</a>, and <a href="#">Understanding Document Approvals</a>.</p>
<b>Document Approval</b>	<p>Select to indicate that approvals are required for documents. If you select this check box, the system requires the document administrator to submit documents for approval. If you do not select this check box, the document administrator can click the <b>Approve</b> button to approve the document and to dispatch it to the supplier for a final signature. See <a href="#">Understanding Document Approvals</a>.</p>
<b>Document Reapproval After Edit</b>	<p>Select to indicate that a document must be reapproved if the document is edited after it was initially approved. Depending on internal controls for documents in your organization, this may or may not be required.</p>

For additional information about Digital Signatures, see [Understanding Digital Signatures](#)

<b>Field or Control</b>	<b>Description</b>
<b>Enable Internal Signatures</b>	<p>Select to allow internal users to digitally sign a document using Adobe or Microsoft Word signatures. When this check box is selected: .</p> <ul style="list-style-type: none"> <li>• You must select an option in the <b>Signature Method</b> field.</li> <li>• The system opens the <b>Enable External Signatures</b> check box.</li> </ul> <p>Typically, an electronic version of a contract can replace a paper-based version.</p> <p>When you enable internal signatures, the <b>Prepare Document for Signing</b> button appears on the <u>Document Management Page</u>. This button enables you to convert a document to a .pdf file, stage it to be signed, and indicate that it is available to be signed. This causes additional buttons to appear on the Document Management page that enable you to convert the document.</p> <hr/> <p><b>Note:</b> Because digital signature methods are determined at the installation level, you must enable internal signatures using this check box before you can enable them for a document type on the <u>Document Type Page</u>.</p> <hr/>

<b>Field or Control</b>	<b>Description</b>
<b>Signature Method</b>	<p>Select a method for signing a contract document or for rendering contract documents in PDF. Signature methods include:</p> <ul style="list-style-type: none"> <li>• <i>Adobe (Deprecated)</i>: Select to sign documents using Adobe Systems software.  To use this signature method, you must have Adobe Acrobat on a windows machine, the server must be set up, and a URL must be defined in the Document Compares and Rendering section. In addition, the administrator must have Adobe Professional 8 installed and users, who are required to sign a document, must have Adobe Reader installed.</li> <li>• <i>Adobe (Word)</i>: Select to dispatch contract documents in PDF or to use Adobe digital signatures.  To use this signature method you need Microsoft Word 2007, or a later version, installed on the Windows machine. In addition, to use Adobe digital signatures, the document administrator must have Adobe Acrobat installed and users who are required to sign documents must have Adobe Reader installed.</li> <li>• <i>Adobe Sign</i>: Select to sign documents using Adobe Sign.  To use this signature method, you must have an Adobe Sign account. In addition you must have Microsoft Word 2007 (minimum) on the Windows machine and the URL for the application server must be defined in the Document Compares and Rendering section.</li> <li>• <i>DocuSign</i>: Select to sign documents using DocuSign.  To use this signature method, you must have a DocuSign account. All documents pending signature must be cancelled before you select DocuSign as the signature method.</li> <li>• <i>Word</i>: Select to sign documents using Microsoft Word.  To use this signature method, you must have Microsoft Word 2007, or later version, on the Windows machine and the URL for the application server must be defined in the Document Compares and Rendering section. In addition, users who are required to sign the document must use Microsoft Word 2007, or later version, to sign the document.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
	<p>If you selected the Enable Internal Signatures check box, or dispatch contract documents in a .doc, .docx, or .pdf file format, then you must select a value for this field. If you do not select an option, the system displays an error message when you save the settings.</p> <p>For Adobe signature methods, Oracle recommends that you use Adobe (Word) for Adobe digital signatures and Adobe PDF to dispatch documents.</p> <hr/> <p><b>Note:</b> You cannot change signature methods while there are documents pending signature.</p> <hr/>
<b>Sign Template</b>	<p>Select a template that you want internal signers to use when a document is routed to them for electronic signatures. The system-supplied value for the Sign template, <i>DocumentSign</i>, appears as the default value for the field.</p> <hr/> <p><b>Note:</b> All templates are for Adobe and Word digital signature methods.</p> <hr/>
<b>Decline Signing Template</b>	<p>Select a template that you want internal users to use when they decline to sign a document. The system-supplied value for the Decline Signing template, <i>DocumentRejectSigning</i>, appears as the default value for the field.</p>
<b>Complete Template</b>	<p>Select a template that you want internal signatures to use when the routing process is complete. The system-supplied value for the Complete template, <i>DocumentSignComplete</i>, appears as the default value for the field.</p>
<b>Cancel Template</b>	<p>Select a template that you want to use to alert pending signers when the routing for internal signatures process is canceled. The system-supplied default value for the Cancel template, <i>DocumentSignCancel</i>, appears as the default value for the field.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Enable External Signatures</b>	<p>Select to enable external users to sign documents using digital signatures. When you select this check box, the system makes the external signature templates available. These are generic templates that you can use to define the content of emails for certain actions between document approvers.</p> <hr/> <p><b>Note:</b> Because digital signature methods are defined at the installation level, you must enable external signatures using this check box before you can enable them for a document type on the <a href="#">Document Type Page</a> .</p> <hr/>
<b>Signed Template</b>	Select a template that you want to use when an external user has electronically signed a document. The system-supplied value for the Signed template, <i>DocumentSupplierSigned</i> , appears as the default value for the field.
<b>Cancel Template</b>	Select a template that you want to use to alert external users when the external signature process is canceled. The system-supplied value for the Cancel template, <i>DocumentStopExternalSignatures</i> , appears as the default value for the field.
<b>Decline Signing Template</b>	Select a template that you want to use to alert the contract administrator when an external user declines to sign a document. The system-supplied value for the Decline Signing template, <i>DocumentExternalRejectSigning</i> , appears as the default value for the field.

### Related Links

[Transactional Purchasing Contracts](#)

[Transactional Purchase Orders](#)

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## Setting Up Document Templates and Styles

To set up document templates and styles, use the Document Template and Styles component (CS\_WORD\_TMPL\_SETUP).



## Page Used to Set up Document Templates and Styles

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Define Document Templates and Styles Page</a>	CS_WORD_TMPL_SET	Set up document templates and styles.

## Understanding Document Templates

Document templates are predefined Microsoft Word documents that enable you to format documents. Document templates traditionally determine the basic structure for the document that you use when you create documents. A document template in Microsoft Word is another Microsoft Word document that uses the extension *.dot*. Document templates traditionally have placeholders where you enter text and use the placeholder as a starting point for final documents.

A template may contain document settings, such as autotext entries, fonts, key assignments, macros, menus, page layouts, special formats, and styles. When you save a document template, Microsoft Word stores it in the Templates folder or in one of its subfolders.

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**Note:** Microsoft Word document templates are used only as a basis for the creation of documentation. Other types of templates, such as notification templates and document configurators, are used by the PeopleSoft Supplier Contract Management application to manage approvals and collaboration.

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### Related Links

[Format and Style Considerations in Microsoft Word](#)

[Templates](#)

[Sample Templates](#)

## Define Document Templates and Styles Page

Use the Define Document Templates and Styles page (CS\_WORD\_TMPL\_SET) to set up document templates and styles.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Document Templates and Styles**

This example illustrates the fields and controls on the Define Document Templates and Styles page.

### Define Document Templates and Styles

Upload another File

**Document Style Templates** Personalize | Find | First 1-4 of 4 Last

Template Name	View	Where Used	File Format	Delete
STDTEMPLATE.XML	<span>View</span>	Where Used	Word 2003 XML	<span>[-]</span>
STDTEMPLATE_2007.XML	<span>View</span>	Where Used	Word Open XML	<span>[-]</span>
STDTEMPLATE_HF.XML	<span>View</span>	Where Used	Word 2003 XML	<span>[-]</span>
STDTEMPLATE_HF_2007.XML	<span>View</span>	Where Used	Word Open XML	<span>[-]</span>

**Styles** Personalize | Find | First 1-6 of 6 Last

Style Name	Description		
ListArticle	List Article	<span>+</span>	<span>-</span>
PSBody1	Default Body Stl (Numbr Title)	<span>+</span>	<span>-</span>
PSBody2	Dflt Body Stl for Unnum Title	<span>+</span>	<span>-</span>
PSBody3	Dflt Body Stl for Num body onl	<span>+</span>	<span>-</span>
PSNumHeading	Default List Style for Title	<span>+</span>	<span>-</span>
PSUnnumHeading	Default Unnumbered Title Style	<span>+</span>	<span>-</span>

Use this page to upload Microsoft Word document templates containing paragraph styles to use with supplier contracts. This page contains all the valid Microsoft Word document templates that you can use with SetIDs and configurators. Microsoft Word document templates must be inclusive of all paragraph styles that you use in the system, regardless of whether they are defaults for document generation or for overriding a style within a clause.

Bind variables are typically included in individual clauses and sections. However, you can include certain bind variables in a document template that binds transactional information, for example, into a Microsoft Word document template header or footer fields. This bind repeats on authored pages of a document. If a specific Microsoft Word document template contains header or footer bind variables, and the template is associated with a document configurator, verify that the bind variables are mapped for the same source transaction as the document configurator. For example, if you set up a document configurator to use with an ad hoc source transaction, then you must also map the transactional bind variables that are used in the Microsoft Word document template to the ad hoc source.

The system does not provide a warning if the source transaction for binds is different from the source for the document configurator. The system also does not resolve the binds in the contract document, but it does provides a message that the bind is unresolved in the document generation log.

See [Setting Up Document Configurators and Templates](#).

## Define Document Templates and Styles

<i>Field or Control</i>	<i>Description</i>
<b>Upload another File</b>	Click to access the Upload Document Style Template File window where you can select the location of a template that you want to upload and add to the group of available templates.

## Document Style Templates

<i>Field or Control</i>	<i>Description</i>
<b>Template Name</b>	Displays the name of the document template after it has been uploaded. This is the name of the file that is stored in the template folder. After you upload the file, you can change the template name.
<b>View</b>	Click to open the corresponding document template.
<b>Where Used</b>	Click this link to access the <a href="#">Search for All Content Instances Page (Define Document Templates and Styles)</a> .

## Styles

Use this section to list all valid paragraph styles that are defined in Microsoft Word document templates that you want to use for PeopleSoft prompting. You must enter these paragraph styles exactly as they are in the Microsoft Word document template such as spacing and upper and lower case. This is because the system does not validate against the Microsoft Word document template. System prompting for styles is based on this list to reduce the chance of data-entry errors.

<i>Field or Control</i>	<i>Description</i>
<b>Style Name</b>	Enter all valid paragraph styles that you will use in PeopleSoft Supplier Contract Management across all Microsoft Word document templates.
<b>Description</b>	Enter a description of the style. This should provide further details about how the style appears and its format.

## Related Links

[Understanding Microsoft Word Document Generation](#)

[Generating Microsoft Word Documents](#)

[Format and Style Considerations in Microsoft Word](#)

# Setting Up Document Formats and Options

## Page Used to Set Up Document Formats and Options

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Document Format and Options Page</u>	CS_CONFIG	Define default settings for document formats and options.

## Document Format and Options Page

Use the Document Format and Options page (CS\_CONFIG) to define default settings for document formats and options.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Document Format and Options**

This example illustrates the fields and controls on the Document Format and Options page.

### Document Format and Options

Text styles are required for the basic paragraph formatting content for previewing clauses, sections, configurators and viewing generated documents. Style names defined here must match reference styles you define and customize within your document templates in their native application.

Normally the editors of clauses, sections and configurators should generally refrain from specifying any paragraph styles as they edit (instead use 'normal') since the styles below will be automatically applied during preview and contract generation. If an editor wishes to override a paragraph style that same style must already exist in the Word template in order to render the similar format for the authored document.

SetID: SHARE

#### Document Defaults and Options

The Default Document Template governs which styles the system will apply when previewing clauses and sections. When the system generates a full document, it applies paragraph styles defined in the word template referenced within each configurator. Your paragraph styles and related outline numbering schemes are used to provide desired numbering method and indentation with authored documents.

Word Template Name:

Allow Check-In as Same Version

Amendment Creation Default:

#### Document Text Styles

Define paragraph styles for Numbered Title and Body under Numbered Title for use within numbered clauses and sections. The Numbered Title style within Word must have an associated outline level numbering scheme. The Body under Numbered Title style is applied to all paragraph text that appears beneath numbered titles.

\*Numbered Title Style:

\*Body Style under Numbered Title:

Define paragraph styles for Unnumbered Title and Body Under Unnumbered Title for use within clauses or sections that are not numbered. The Unnumbered Title style applies to all unnumbered clause and section titles within the document regardless of outline level. The Body under Unnumbered Title style is applied to all paragraph text that appears beneath unnumbered titles.

\*Unnumbered Title Style:

\*Body Style under Unnumbered Title:

Define a style for Numbered Body if you wish to create numbered text within normal body paragraphs (i.e., you have not defined this text as a title within a clause or section definition).

\*Numbered Body Style:

Use this page to define Microsoft Word templates and paragraph text styles. These paragraph style values control how a document is formatted and numbered when it is initially created within the selected SetID.

## Document Defaults and Options

Use this section to define values that the system applies to a document when you initially apply a Microsoft Word document template to a document.

<b>Field or Control</b>	<b>Description</b>
<b>Word Template Name</b>	<p>Select a Microsoft Word template to use in the preview mode for clauses and sections within this SetID. This value controls the default MS Word template that the system uses for all document configurators. The available templates are XML versions of word template files that use the (.dot) extension. The system also uses the template that you select as the default template to populate the <b>Word Template</b> field when you add a document configurator. You use the default template for clause and section previews, when you initially generate the document generation, and when you preview the configurator structure.</p> <p>The templates that are available to choose from are those that have been uploaded from Microsoft Word template folders. To add more templates, use the <a href="#">Define Document Templates and Styles Page</a>.</p>
<b>Allow Check-In as Same Version</b>	<p>Select to indicate that you want to enable a document to be checked in as the same version that it was when it was checked out. When this check box is selected, you can leave the document at the same version instead of having the system check it in as an incremental version.</p> <p>This option is also available when you refresh or re-create a document. Use caution when using this function because if you do not increment the version number during check in, the system overwrites previous files (file pointers in history) that used the same version number with this new file.</p> <p>For history and tracking purposes, you change the version of a document for actions that can affect the contents. However, if you select this check box, the system provides access to only the latest version of the document on the <a href="#">Document History Page</a>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Amendment Creation Default</b>	<p>Select an option that determines the default setting when you create and update amendments. The system uses this value to process amendments when you are using the <a href="#">Document Management Page</a>. You can always override this value when creating the first amendment of a specific document.</p> <p>Options include:</p> <ul style="list-style-type: none"> <li>• <i>Amend Contract Only</i>: Select to process amendments within the original document and not use a separate amendment file. If you select this option, the system leaves the last processed version in place and creates a new version of the same document that you can edit as an amended contract.</li> <li>• <i>Amend Contracts with Amendments</i>: Select to amend the original document, and to create a separate amendment document that is specific for the amendment number. If you select this option, the system creates and maintains two files to check in and check out <ul style="list-style-type: none"> <li>• The first file is for the last processed document and the second file is for changes made to the amendment specifically.</li> <li>• The second amendment file is generated by the system, and you must specify an amendment document configurator for its initial content.</li> </ul> <hr/> <p><b>Note:</b> Use this option if you want to maintain only amendment-related changes in a new version of the originally processed contract.</p> <hr/> </li> <li>• <i>Amendment Files Only</i>: Select to generate the amendment as a separate document for each version of the amendment. This leaves the last original document as is. This option is similar to <b>Amend Contracts with Amendments</b> except that it requires you to only maintain a separate amendment file that only describes the changes to the original contract. Use this option if you do not intend to maintain online amendment-related changes in a new version of the originally processed contract.</li> </ul> <p>See <a href="#">Setting Up System Values for Amendments</a>.</p>

## Document Text Styles

Use this group box to define default styles to be applied to Microsoft Word documents. Styles determine the format and appearance of content in the document.

**Warning!** Be careful when you maintain the paragraph styles that are listed on this page and the styles within Microsoft Word templates. The styles affect the generated format for previewing clauses, sections, configurators, and generated contracts.

When previewing from the clause or section component, the system uses the Microsoft Word template that you specify on this page. When previewing from a document configurator or build a document from a configurator, the system uses the Microsoft Word template that is specified on the document configurator, which is supplied from the SetID value. You can select styles for different uses with the template.

<b>Field or Control</b>	<b>Description</b>
<b>Numbered Title Style</b>	<p>Select a paragraph style to use with a Numbered Title style. The system uses this style, followed by the style entered in the <b>Body Style under Numbered Title</b> field to determine how numbered clauses and sections appear. The system applies this paragraph style when a clause or section is part of a title and when the <b>Numbered</b> check box is selected on the <a href="#">Clause Definition Page</a> or <a href="#">Section Definition Page</a>. The paragraph style, within Microsoft Word, must be associated with a custom outline-level numbering scheme, to achieve the numbering format that you want when an authored contract is generated.</p> <hr/> <p><b>Note:</b> In Microsoft Word, the <b>Level</b> field in the Custom Outlined Numbered list corresponds to the <b>Outline Position</b> field in the Content Elements section on the <a href="#">Document Configurator Definition Page</a>. For each element that is assembled for the contract in the authored document, the system applies the correct numbering, indentation, and format based on the final level in the Microsoft Word document. For more information about paragraph styles and custom outline numbered lists, see Microsoft Word documentation.</p> <hr/> <p>This example illustrates the PeopleSoft Numbered Title style using PSNumHeading.</p> <pre> 1. Introduction, level one title    Introduction text with multiple lines.     1.1 Level two title        This is text under level 2 title     1.2 Another level two title        This is text under level 2 title  2. Another level one title    Text for second level one title </pre>

<b>Field or Control</b>	<b>Description</b>
<b>Body Style Under Numbered Title</b>	<p>Select a style that determines how text should appear in documents when that text follows numbered titles. The system uses this paragraph style with the style in the <b>Numbered Title Style</b> field when the system generates and indents a document . The indented title and body aligns through the paragraph style in Microsoft Word.</p> <p>In Microsoft Word, this paragraph style is typically associated with a blank Customized Outline Number List. This paragraph style also has Number and Text positions within the Level, in Microsoft Word. Therefore, when clauses and sections are indented, the body is generated correctly, depending on the outline position of the clause and section in the document configurator.</p>
<b>Unnumbered Title Style</b>	<p>Select a paragraph style to use with Unnumbered Title styles. The system uses this style followed by the style entered in the <b>Body Style under Unnumbered Title</b> field to determine how unnumbered clauses and sections appear. The system applies this paragraph style when a clause or section is part of a title and when the <b>Numbered</b> check box is not selected on the <u>Clause Definition Page</u> or the <u>Section Definition Page</u> . This style applies to all unnumbered clause and section titles within the document regardless of the outline level.</p> <p>This example illustrates the Unnumbered Title style.</p> <pre> Introduction, level one title Introduction text with multiple lines.      Level two title     This is text under level 2 title      Another level two title     This is text under level 2 title  Another level one title Text for second level one title                     </pre>



<b>Field or Control</b>	<b>Description</b>
<b>Body Style Under Unnumbered Title</b>	<p>Select a style that determines how text should appear in documents when that text follows unnumbered titles.</p> <p>The system uses this paragraph style with the style in the <b>Unnumbered Title Style</b> field when the system generates and indents a document. The indented title and body aligns through the paragraph style in Microsoft Word.</p> <p>In Microsoft Word, this paragraph style is typically associated with a blank Customized Outline Number List . This paragraph style also has number and text positions within the level in Microsoft Word. Therefore, when clauses or sections are indented, the body is generated correctly, depending on the outline position of the document configurator and its content.</p>
<b>Numbered Body Style</b>	<p>Select a paragraph style to use with a numbered body style if you want to create numbered text within normal body paragraphs. This value is used when you have not defined this text as a title within a clause or section definition. The system applies this paragraph style when it includes a clause or section without a title and when the <b>Numbered</b> check box is selected. This example illustrates the Numbered body style.</p> <p>1. Offers can be mailed or hand-delivered, but must be physically received by the terms specified. A supplier that submits an offer by mail should allow sufficient mail handling time.</p> <p>2. No extension of time will be granted for submissions by mail or any other type of submission. Offers submitted by email, facsimile transmission, or any other forms of electronic submission are not allowed.</p> <hr/> <p><b>Note:</b> For more information about paragraph styles and custom outline numbered lists, see Microsoft Word documentation.</p> <hr/>

**Related Links**

[Styles and Formatting](#)

[Style Examples](#)

## Setting Up User-Defined Fields

### Page Used to Set Up User-Defined Fields

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>User Defined Fields Page</u>	CS_USER_FLD_SETUP	Set up user-defined fields.

### Understanding User-Defined Fields

User-defined fields enable you to create your own attributes and associate them to a document header. PeopleSoft Supplier Contract Management enables you to set up and use these predefined fields to track and search for specific document information. User-defined values are captured as part of a wizard response or directly within the Document Management component and are stored with the document.

When you add a user-defined field, the field is available across a variety of PeopleSoft Supplier Contract Management features, in addition to being visible for searches and when using the Document Management component, you can use these fields to search for documents using the Search Framework as a specific database field. For example, if you create a user-defined field for a geographic region, then you can use the search dialog box, in the Document Management component, to search for suppliers in a region. You can also create a special workflow step, within approvals, to require special routings based on user-defined fields.

You can use user-defined fields only when the **Use Document Type** check box is selected on the Installation Options - Supplier Contract Management Page. The system displays a warning if you set up user-defined fields without having document types enabled. After you enable the settings for all user-defined fields, for the entire system, and for each document type, you can specify to not use any of them, use all of them, or use selected user-defined fields.

Oracle delivers these types of user-defined fields:

- Twelve 10-character fields.
- Twelve 30-character fields.
- Eight 60-character fields.
- Six 120-character fields.
- 15 date fields.
- 24 integer fields.
- 15 decimal fields (nine (23.3) fields and six (11.4) fields).

### User Defined Fields Page

Use the User Defined Fields page (CS\_USER\_FLD\_SETUP) to set up user-defined fields.

Navigation:

**Supplier Contracts >Supplier Contract Setup >User Defined Fields,**

This example illustrates the fields and controls on the User Defined Fields page (1 of 4).

**User Defined Fields**

**Character User Defined Fields**

1-10 of 38 | View All

User Fields | Additional Settings

Field Name	Description	Enable	Use in Searching	Visible to Supplier	Label to Display
CS_CHAR_USER1	Character 10 User Field 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Third Party
CS_CHAR_USER11	Character 10 User Field 11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_CHAR_USER12	Character 10 User Field 12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_CHAR_USER13	Character 10 User Field 13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_CHAR_USER14	Character 10 User Field 14	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_CHAR_USER15	Character 10 User Field 15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_CHAR_USER16	Character 10 User Field 16	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_CHAR_USER17	Character 10 User Field 17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_CHAR_USER18	Character 10 User Field 18	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_CHAR_USER2	Character 10 User Field 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

This example illustrates the fields and controls on the User Defined Fields page (2 of 4).

**Date User Defined Fields**

1-10 of 15 | View All

User Fields | Additional Settings

Field Name	Description	Enable	Use in Searching	Visible to Supplier	Label to Display
CS_DATE_USER1	Date User Field 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Quote Submit Deadline
CS_DATE_USER10	Date User Field 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DATE_USER11	Date User Field 11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DATE_USER12	Date User Field 12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DATE_USER13	Date User Field 13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DATE_USER14	Date User Field 14	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DATE_USER15	Date User Field 15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DATE_USER2	Date User Field 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DATE_USER3	Date User Field 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DATE_USER4	Date User Field 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

This example illustrates the fields and controls on the User Defined Fields page (3 of 4).

Integer User Defined Fields					
Field Name	Description	Enable	Use in Searching	Visible to Supplier	Label to Display
CS_INT_USER1	Integer User Field 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_INT_USER10	Integer User Field 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_INT_USER11	Integer User Field 11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_INT_USER12	Integer User Field 12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_INT_USER13	Integer User Field 13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_INT_USER14	Integer User Field 14	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_INT_USER15	Integer User Field 15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_INT_USER16	Integer User Field 16	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_INT_USER17	Integer User Field 17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_INT_USER18	Integer User Field 18	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

This example illustrates the fields and controls on the User Defined Fields page (4 of 4).

Decimal User Defined Fields					
Field Name	Description	Enable	Use in Searching	Visible to Supplier	Label to Display
CS_DEC_USER1	Decimal User Field 1 (23.3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DEC_USER10	Decimal User Field 10 (23.3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DEC_USER11	Decimal User Field 11 (23.3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DEC_USER12	Decimal User Field 12 (11.4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DEC_USER13	Decimal User Field 13 (11.4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DEC_USER14	Decimal User Field 14 (11.4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DEC_USER15	Decimal User Field 15 (11.4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DEC_USER2	Decimal User Field 2 (23.3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DEC_USER3	Decimal User Field 3 (23.3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CS_DEC_USER4	Decimal User Field 4 (11.4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

<b>Field or Control</b>	<b>Description</b>
<b>Field Name</b>	Displays a system-supplied user field that you can set up with a specific label to use that meets an organization's needs.
<b>Description</b>	Displays the system description for the field. The description identifies whether the field is for use with character, date, integer, or decimal values. The description also provides the character length or decimal positions for a field.

<i>Field or Control</i>	<i>Description</i>
<b>Enable</b>	Select to enable a field for use across the installation. The makes the field available when you select to use user-defined field in a document type. When you enable the field, it also makes the remaining fields in the row available for input.
<b>Required</b>	Select to indicate that this field is a required field when you are creating documents.
<b>Use in Searching</b>	Select to use this field when you are performing document or Search Framework searches. When this option is selected, the Find an Existing Document page and search pages include a <b>User Defined Fields</b> section. Use the <b>User Defined Fields</b> section to limit the search to specific attributes for the field.
<b>Visible to Supplier</b>	Select to indicate that this field is visible to external supplier users. External users cannot change user-defined field values.
<b>Label to Display</b>	Enter the label for the field that is to be displayed on all pages. This label appears on all Document Management component pages that use the field.

### Additional Settings Tab

<i>Field or Control</i>	<i>Description</i>
<b>Set from Wizard</b>	<p>Select to extract the value from a contract wizard. This enables you to indicate that the value should come from an answer in a wizard. When you select this check box, the <b>Bind Variable</b> field becomes available. When you create, refresh, or re-create a document, the system automatically populates this user-defined field with the wizard answer that corresponds to the bind variable.</p> <p>When you view a wizard field in the Document Management component, the field is display-only, which indicates that it came from the wizard. This option is helpful if you want to set up your routings in the approval cycle based on a wizard value or if you want to search for a wizard value. Indicating that a value from a user-defined field should come from a wizard can be useful when you want to collect a header-level attribute using a wizard question and store it on the document header for search, visibility, and workflow routing purposes.</p>
<b>Bind Variable</b>	Select a wizard bind variable to use as the value to populate the user-defined field when the wizard is invoked.

<i>Field or Control</i>	<i>Description</i>
<b>Tie to Prompt Table</b>	Select this check box to indicate that the list of values for this field should come from a prompt table. This option only applies to character fields and fields that are not already set to pull the value from a wizard bind. If you select this check box, you also need to select a value in the <b>Prompt Table</b> field.
<b>Prompt Record</b>	<p>Select a prompt record to use with this user-defined field. When you select to tie a field to a prompt table, the system provides a list of predefined tables. When you create a document, the system displays a <b>Prompt</b> button next to the user-defined field, which lists the available choices for the field.</p> <hr/> <p><b>Note:</b> Valid prompt tables for this option must contain a single key. This is the field from which you want to prompt. To use this feature in an environment, you may need the system administrator create specific views for the environment. This provides the appropriate selection of data for the user.</p> <hr/>
<b>Display Related Field</b>	<p>Select a field to use with the prompt record.</p> <p>Only fields related to the prompt record are available for selection.</p>

## Setting Up Automatic Numbering

### Page Used to Set Up Automatic Numbering Specifications

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Auto Numbering Page</u>	AUTO_NUM_PNL	Define number types and starting sequences for documents.

### Understanding Automatic Numbering

Automatic numbering creates and applies a system-generated number to new objects as they are entered into the system. Automatic Numbering can be used when creating a clause ID, contract ad hoc ID, section ID, contract reporting entity ID, contract number, and so on. When you use automatic numbering, you determine a starting sequence for the object. As the system processes a new object, it uses the value in the **Start Sequence** field and increments the value in the **Last Number Used** field to determine the ID. You need to set up automatic numbering data for each SetID that you use for automatic numbering.

The application package SAC\_ID\_GEN contains classes that the system uses for automatic numbering. The default starting sequence comes from the AUTO\_NUM\_TBL record.

### Example of Setting Up Automatic Numbering for Sections

To set up automatic numbering for sections. For example, create an automatic numbering sequence for a series of sections that relate to product inspections. Remember that PeopleSoft Supplier Contract Management provides numbering for section IDs.

1. Create an entry for each sequence that you want to use for automatic numbering.

Select **Supplier Contracts > Supplier Contracts Setup > Auto Numbering**.

2. Select the Add a New Value tab.
3. Select *Contract Sections* in the **Number Type** field.

The Auto Numbering page appears.

4. Select *CS\_OBJECT\_ID* in the **Field Name** field.

5. Complete the numbering details.

In this example, enter *INS* as the starting sequence for inspections. After completing the details, save the numbering scheme for contract sections and select the **Default** check box. If you do not select the **Default** check box, then the system uses the last sequence added as the default and automatically selects it when you save the page.

### Example of Using Automatic Numbering for Sections

To use automatic numbering for sections based on the example above:

1. Select **Supplier Contracts > Manage Contract Library > Section Definition**

2. Select the Add a New Value tab.

The system inserts *NEXT* in the **Section ID** field, which is a placeholder.

3. Click **Add** and enter the section information.
4. Save the section.

The system applies the default prefix as the starting sequence and then applies the numbering scheme using the next available number in the sequence.

## Auto Numbering Page

Use the Auto Numbering page (AUTO\_NUM\_PNL) to define number types and starting sequences for documents.

Navigation:

**Supplier Contracts > Supplier Contract Setup > Auto Numbering**

This example illustrates the fields and controls on the Auto Numbering page.

**Auto Numbering**

SetID    SHARE    CORPORATE SETID

Number Type    CADH    Contract Ad Hoc ID

\*Field Name    CS\_ADHOC\_ID        Length    25

**Automatic Numbering Details**

1-3 of 3 | View All

*Start Seq	*Max Length	*Description	Last Number Issued	Default?		
ADH	10	Adhoc default prefix	1	<input type="checkbox"/>	+	-
LEA	8	Lease prefix	4	<input type="checkbox"/>	+	-
NDA	7	NDA prefix	19	<input checked="" type="checkbox"/>	+	-

**Note:** For clauses, sections, and contract reporting entities, a single numbering scheme, which is the default value, can be active at any time for each SetID. For ad hoc ID numbering, users who are not using document types, or document types for which the sequence is not specified on the Document Type Setup page, you have one active automatic numbering scheme as well. However, if you define numbering schemes for multiple contract ad hoc IDs, you can select which one to use on the Document Type page. This enables the use of a specific nondefault-value numbering scheme for each document type.

<b>Field or Control</b>	<b>Description</b>
<b>Number Type</b>	<p>Displays the number type to which these automatic-numbering details belong. Number types are provided with PeopleSoft Supplier Contract Management and include:</p> <ul style="list-style-type: none"> <li>• <i>Contract Ad Hoc ID</i></li> <li>• <i>Contract Clauses</i></li> <li>• <i>Contract Number</i></li> <li>• <i>Contract Reporting Entity ID</i></li> <li>• <i>Contract Sections</i></li> </ul>



<b>Field or Control</b>	<b>Description</b>
<b>Field Name</b>	<p>Select a field for automatic numbering. The field that you select should be the key field that you want for the type of number that you are generating. Fields for each of the PeopleSoft Supplier Contract Management number types are:</p> <ul style="list-style-type: none"> <li>• <i>Contract Ad Hoc ID: CS_ADHOC_ID</i></li> <li>• <i>Contract Clause: CS_OBJECT_ID</i></li> <li>• <i>Contract Number: CNTRCT_ID</i></li> <li>• <i>Contract Section: CS_OBJECT_ID</i></li> <li>• <i>Contract Reporting Entity: REPORT_ENTITY</i></li> </ul> <p>You can set up automatic numbering in PeopleSoft Purchasing for the transactional purchasing contract. This is similar to the numbering concept for the Contract Entry component in PeopleSoft Supplier Contract Management.</p> <p>See "Defining Contract and Vendor Rebate Control Parameters" (PeopleSoft Source to Settle Common Information).</p>
<b>Start Seq</b> (start sequence)	<p>Enter a prefix using up to three alphanumeric characters. For example, for the CS_ADHOC_ID field, you can use a unique prefix of <i>DOC</i> for generated documents.</p> <p>When you enter fewer than three characters, the system automatically adds zeros to complete the start sequence. For example, if you enter <i>2</i> in the starting sequence field, the system updates the field to <i>200</i>. When the system assigns numbers, the system increments the value in the <b>Last Number Used</b> field by one. In this example, if the maximum length is five, and then the number may appear as <i>20025</i>. Notice that the first three numbers represent the start sequence.</p>
<b>Max Length</b> (maximum length)	<p>Enter a maximum character length for the number. The length cannot exceed the length of the field that appears with the field name.</p>
<b>Last Number Issued</b>	<p>Displays the last number that the system used to generate an automatic number in this numbering sequence. The starting value is zero, meaning that the system will assign 1 as the next ending number. You can change the number. If you change the number, automatic numbering will increment the next number in the sequence by one.</p>

<i>Field or Control</i>	<i>Description</i>
<b>Default</b>	<p>Select to indicate that the system should use the sequence as the default value for automatic numbering. You can select only one row as the default.</p> <p>If the <b>Use Document Type</b> check box is selected on the <u>Installation Options - Supplier Contract Management Page</u> and no start sequence is specified for a document type, then the system uses the row that is marked as the default to assign a number.</p>

## Using the Data Migration Workbench for PeopleSoft Supplier Contract Management

Application Data Sets (ADS) can be used with PeopleSoft Supplier Contract Management for the purpose of moving data between development environments, test environments, and ultimately to a production environment.

This table lists the delivered ADS definitions (delivered in Data Set Designer) to support the migration of PeopleSoft Supplier Contract Management setup data.

<i>Delivered ADS to Support PeopleSoft Supplier Contract Management Setup</i>	<i>Dependencies</i>	<i>Application Data Set (ADS) Usage</i>
Document Formats and Options - CS_DOC_FORMAT	None	<p>This data set includes the records that define the default word template used to create and preview clause and section content, and paragraph styles</p> <hr/> <p><b>Note:</b> The data in Document Templates and Styles must be manually updated on the target database before replicating data from this data set.</p> <hr/>
Document Configurator Types - CS_DOCUMENT_CONFIG_TYPE	None	This data set includes the records that define requirements used in document configurators.
Libraries - CS_LIBRARIES	None	This data set includes the records that define clause libraries.

<b>Delivered ADS to Support PeopleSoft Supplier Contract Management Setup</b>	<b>Dependencies</b>	<b>Application Data Set (ADS) Usage</b>
Approval Types - CS_APPROVAL_TYPE	None	<p>This data set includes the records that define approval types that indicate risk levels and approval settings by role.</p> <hr/> <p><b>Note:</b> If a role does not exist in target database, there could be validation errors. You should copy the role definitions before you copy approval types.</p> <hr/>
Classes - CS_CLASSES	<p>Approval Types</p> <hr/> <p><b>Note:</b> Approver types are optional for a class. With this relation, the Data Migration Workbench prompts you whether the approver type should be included in the migration.</p> <hr/>	<p>This data set includes the records that define classes and maps to approval types.</p>
User Defined Fields - CS_USER_DEFINED_FIELDS	<p>Binds</p> <hr/> <p><b>Note:</b> With this relation, the Data Migration Workbench prompts you whether to insert data for any bind used in user defined fields.</p> <hr/>	<p>This data set includes the records that define user defined fields for character, date, integer, and decimal data types. These fields can be tied to bind variables and can be used to search for documents.</p>
Wizard Prompt Tables - CS_WIZARD_PROMPTS	None	<p>This data set includes the records that define the prompt tables used by bind definitions.</p>
Binds - CS_BINDS	<p>Wizard Prompt Tables</p> <hr/> <p><b>Note:</b> With this relation, the Data Migration Workbench prompts you whether to include wizard prompt tables used in the data content for bind variables.</p> <hr/>	<p>This data set includes the records that define bind variables used by clauses, sections, rules, and supplier contract documents.</p>
Bind Mappings - CS_BIND_MAPPINGS	<p>Binds</p> <hr/> <p><b>Note:</b> With this relation, the Data Migration Workbench prompts you whether to include bind variables used in the data content.</p> <hr/>	<p>This data set includes the records that define the mappings between transaction type bind variables.</p>

<b>Delivered ADS to Support PeopleSoft Supplier Contract Management Setup</b>	<b>Dependencies</b>	<b>Application Data Set (ADS) Usage</b>
<p>My Document Preferences:</p> <ul style="list-style-type: none"> <li>• CS_DOCPREF_COLLABORATORS</li> <li>• CS_DOCPREF_ROLEACCESS</li> </ul>	<p>Operator Definitions and Roles</p>	<p>This data set includes the records that define default internal collaborators and role level view access for documents. The two records that contain the data to be transported are not related and therefore two data sets are needed.</p> <p>If you need to copy data for collaborators and role access, then the project must include both data sets in Data Migration Workbench.</p> <p>If you do not need to copy data for collaborators and role access, then include the one that has the data change. For example, if you only want to make changes to default collaborators, then copy only CS_DOCPREF_COLLABORATORS.</p>
<p>User Preferences - CS_USER_PREFERENCES</p>	<p>Operator Definitions and Roles</p>	<p>This data set included the records that define document and administrator privileges for authored documents.</p> <hr/> <p><b>Note:</b> If a user profile does not exist in target database, there could be validation errors. You should copy the user profiles before you copy user preferences.</p> <hr/>
<p>Rules - CS_RULES</p>	<p>Binds, Clauses and Sections</p> <hr/> <p><b>Note:</b> With this relation, the Data Migration Workbench prompts you whether to include bind variables used in the data content.</p> <hr/>	<p>This data set includes the records that define the rules used by clauses, sections, and document configurators.</p>

<b>Delivered ADS to Support PeopleSoft Supplier Contract Management Setup</b>	<b>Dependencies</b>	<b>Application Data Set (ADS) Usage</b>
Clauses and Sections - CS_CLAUSES_SECTIONS	<p>Binds, Rules, and Clauses</p> <p>With the Approval Type relation, the Data Migration Workbench includes the approval types used for clauses.</p> <p>With the Binds relation, the Data Migration Workbench includes the bind variables used for clauses, sections, or both.</p> <p>With the Classes relation, the Data Migration Workbench includes the classes used for clauses.</p> <p>With the Clauses relation, the Data Migration Workbench prompts you whether to include the clauses and sections used as dependents.</p> <p>With the Alternate Clause relation, the Data Migration Workbench prompts you whether to include the clauses that are used as alternate clauses.</p> <p>With the Libraries relation, the Data Migration Workbench prompts you whether to include the clauses that are used for clauses.</p> <p>With the Roles relation, the Data Migration Workbench prompts you whether to include rules that are used in alternate clauses.</p>	<p>This data set includes the records that define:</p> <ul style="list-style-type: none"> <li>• The clauses used in sections and document configurators. All data in the records added to the data set definition are copied, such as clause header and details, alternate clauses, dependent clauses, and bind usage.</li> <li>• The sections used in document configurators. All data in the records added to data set definition are copied, such as clause header and details, dependent clauses, dependent sections, rules, and bind usage.</li> </ul>
Clause Groups - CS_GROUPS	<p>Clauses</p> <p>With the Classes relation, the Data Migration Workbench inserts bind data used for User Defined Fields.</p>	<p>This data set includes the records that define groups to organize and categorize clauses.</p>
Contract Agreements - CS_CONTRACT_AGREEMENT	Clauses and Operator Definitions	<p>This data set includes the records that define the contract agreement codes used in purchasing contracts and can be used as a bind for authored documents.</p>
Question Groups - CS_QUESTION_GROUPS	Binds	<p>This data set includes the records that define questions groups and navigational features.</p>

<b><i>Delivered ADS to Support PeopleSoft Supplier Contract Management Setup</i></b>	<b><i>Dependencies</i></b>	<b><i>Application Data Set (ADS) Usage</i></b>
Wizards -CS_WIZARDS	Question Groups	This data set includes the records that define wizards that have predefined question groups, and are used in a document configurator.
Document Configurators - CS_DOC_CONFIGURATORS	Rules, Clauses and Sections	This data set includes the records that define configurators or templates that use clauses, sections, and rules to create source documents.
Document Configurator Groups - CS_DOC_CONFIG_GROUP	Document Configurators	This data set includes the records that define document configurator groups based on certain contractual requirements or organizational needs.
Document Types - CS_DOC_TYPE	Document Configurators and User Defined Fields.	This data set includes the records that define document types that can be used to categorize and configure authored documents by source transactions.

For more information about the details of each data set, see [Understanding PeopleSoft Supplier Contract Management Setup](#)

For more information about application data sets and data set implementation, see:

- "Understanding the PeopleSoft Data Migration Workbench" (Application Fundamentals)
- "Using Application Data Sets" (Application Fundamentals)
- *PeopleTools: Lifecycle Management Guide*

## Chapter 4

# Setting Up Supplier Contract Management Security

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## Understanding Supplier Contract Sample Permission Lists, Roles, and Users

This topic discusses:

- Sample users, roles, and permission lists.
- Typical users of PeopleSoft Supplier Contract Management.

### Sample Users, Roles, and Permission Lists

The following sample roles and permission lists are provided to demonstrate basic component-level access for different types of users of Supplier Contract Management.

This table describes the sample roles and permission lists to which you could link example users:

<b>Sample User</b>	<b>Sample Role Name</b>	<b>Sample Permission List</b>	<b>Description</b>
CSADMIN - Supply Contract Administrator	Supplier Contract Agree Update (supplier contract agreement update)	EPCS5000 - Supplier Contract Agree Updates (supplier contract agreement update)	Users can update agreement steps for a given contract.
CSLEG1 - Clause Approver	Supplier Contract Clause Apprv (supplier contract clause approver)	EPCS2000 - Supplier Contracts Library	Users of this role can approve clauses in the clause library when you enable approval workflow for clauses. The system includes this role in sample approval definition for clauses.
CSAPPR1 - Supplier Contract Approver	Supplier Contract Hardware Appr (supplier contract hardware approver)	EPCS4000 - Supplier Contracts Casual User	The system includes users of this role for approval workflow of contracts related to transactional purchasing contracts where the items on the contract are linked to the item category of Hardware. The system includes this role in sample approval definition for documents.

<b>Sample User</b>	<b>Sample Role Name</b>	<b>Sample Permission List</b>	<b>Description</b>
CSAPPR1 - Supplier Contract Approver CSLEG1 - Clause Approver	Supplier Contract Interested	EPCS4000 - Supplier Contracts Casual User EPCS6000 - Supplier Contract Agree Monitor	This is a sample role for an interested-party user who can review contracts and monitor agreements.
CSLIB1 - Clause Librarian	Supplier Contract Librarian	EPCS1000 - Supplier Contracts Setup EPCS2000 - Supplier Contracts Library	These users can manage the contract library, including setting up and maintaining binds, groups, classes, rules, clauses, sections, and configurators.
CSADMIN - Supply Contract Administrator	Supplier Contract Administrator (supplier contract administrator)	EPCS1000 - Supplier Contracts Setup EPCS2000 - Supplier Contracts Library EPCS3000 - Supplier Contracts and Documents EPCS5000 - Supplier Contract Agree Updates EPCS6000 - Supplier Contract Agree Monitor EPCS7000 - Supplier Contracts Syndication	This is a sample contract administrator that can author (generate) and maintain contracts. This user also has rights to contract library access, can update and monitor contract agreements, and has access to syndication pages.
SUPPLIER	Supplier-External Contracts (External Document and Agreement Access)	EPCS9000 - Supplier Contracts External	This is a sample external supply-side user with access to collaborate on contract documents as well as update and review agreement information using the supply-side portal.

## Typical Users of PeopleSoft Supplier Contract Management

This topic discusses users described throughout this book.

### Application Administrator

These administrators are technical in nature and are responsible for setting up the supplier contract systems. Their responsibilities might include setting up syndication messaging and subscription nodes, defining search indexes, and setting up approval workflow processes, stages, and steps.



## Document/Contract Administrator

An administrator is typically the contract specialist in an organization and the user performing day-to-day management of documents. This user is also called the document owner. You can define users as document administrators when you set up user preferences. Document administrators can generate, re-create, refresh, and edit documents, and they can control life cycles for document authors. Administrators can also manage approvals by reassigning those that do not have alternates defined for their approval.

Supplier Contract Management provides a sample contract administrator role.

## Sponsor

Sponsors are those users who represent the user from the department that is sponsoring the contract. You define sponsors on the Document Management page for each contract. You can perform searches against document sponsors.

## Librarian

Librarians are users who manage and update content in the contract library. This content includes clauses, sections, configurators, wizards, and question groups. Supplier Contract Management provides a sample librarian user role and self-approval authorities for librarians in user preferences.

## Approver

Approvers are the people responsible for reviewing and providing feedback on documents that are going through an official approval process. Approvers in supplier contracts workflow approvals are those approving clauses or documents. Approvers can approve, deny, or push back a document and can edit a document if they have the authority.

## Reviewer

Reviewers are the people responsible for reviewing and providing feedback on documents going through an official approval process for a clause or document. Reviewers do not have the authority to edit documents.

## Collaborator

Collaborators are internal users who, as part the collaboration process, provide input about the conditions of a contract. You define collaborators using the My Internal Contacts/Collaborators page. External collaborators includes parties external to a company who need to review, edit, and sign a document. When a source transaction is a transactional contract or purchase order, the system can retrieve default information from external collaborator information, such as the user name and email address, that has been setup on the Supplier - Contacts page for contract collaborator contact types.

See "Entering Supplier Contact Information" (PeopleSoft Source to Settle Common Information).

You can also maintain external collaborators for each document. Optionally, you can give an external collaborator with a valid user ID access to collaborate online if you have setup a supply-side portal for them to access. Otherwise, you can preform collaboration using email.

## Interested Party

Interested parties are those users or groups who might have an interest in a document, but who may not necessarily be required to approve the document or provide feedback. Much like reviewers, interested parties have an opportunity to provide collaboration. You can define interested parties by adding users without edit or collaboration authority to your internal contact list.

## Internal Contact

Internal contacts are those users you set up as contacts or collaborators. You can define contacts using system default values when you send clauses or contracts for review or collaboration.

## External Contact

External contacts are people who are outside of the PeopleSoft system and who do not have a system ID. You establish email addresses for these types of contacts so that when you send or dispatch a document, the system emails the document to the contact. You also define addresses and fax numbers if you want to send or dispatch the document manually. You use the External Contacts List to define these contacts.

To collaborate with a supplier, you would define them as an external contact and initiate an online supplier-side external collaboration process, or alternatively, send the contract document as an attachment to them using the **Send to Contacts** button on the Document Management page.

## Related Links

[Collaborating on Documents](#)

[Sending Documents to Internal and External Contacts](#)

[Dispatching Documents](#)

[Defining Document Approvals Using the User Preferences Page](#)

# Managing Document Access

## Pages Used to Manage Document Access

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
"User Preferences - Supplier Contract Management Page" (Application Fundamentals)	OPR_DEF_TABLE_CS	Define user authorization for supplier contract documents and establish the tasks that users can perform on the documents.
<a href="#">Authorized Document Access Page</a>	CS_DOC_AUTH	View, add, or remove proxy users for a specific document administrator.
<a href="#">Delete User Preferences Page</a>	CS_DELETE_USRPREF	Remove user preference settings for a user.

## Understanding User Preferences

User preferences determine the security access and authorization that users (document administrators and librarians) have when working with authored documents. A document administrator is typically a contract specialist in an organization and is the person who manages documents on a daily basis. A librarian manages and updates content in the contract library, which includes clauses, sections, configurators, wizards, and question groups. PeopleSoft Supplier Contract Management provides a user role as a sample for librarians.

Within user preferences, you can determine privileges for users who are document administrators and grant access to documents that are administered by other users, such as a supervisor or team member for other administrators. You can also grant full authorization for all documents to a user ID. In this case, this user has full control of any document in the system.

Users who can generate documents must be set up with document administrator privileges. To restrict access to documents that have a specific document type, then specify role filters on the [Document Type Page](#).

In addition, user preferences determine security settings. These security settings segregate the duties for approving sections, changing document configurator statuses, and importing documents. These users may or may not be document administrators.

See also:

[Document Access Page](#)

"User Preferences - Supplier Contract Management Page" (Application Fundamentals)

## Comparing the User Preferences - Supplier Contract Management Page with the Authorized Document Access Page

You can use the "User Preferences - Supplier Contract Management Page" (Application Fundamentals) to add multiple document administrators for an individual user. Associating the document administrators with the user enables the user to act on behalf of each document administrator added. However, when you want to enable multiple users to act on behalf of a single document administrator, it becomes difficult—you must access and update the user preferences page multiple times to add the same document administrator to different users.

By contrast, you can use the [Authorized Document Access Page](#) to add multiple users for an individual document administrator. This makes it much easier to enable multiple users to act on behalf of a single document administrator. All the users added to this page can perform tasks on the document administrator's documents.

## Authorized Document Access Page

Use the Authorized Document Access page (CS\_DOC\_AUTH) to view, add, or remove users to act on behalf of a specific document administrator. You can also establish individual user privileges, such as approval bypass, for a user.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Define Document Access > Authorized Document Access**

This example illustrates the fields and controls on the Authorized Document Access page.

**Authorized Document Access**

Document Administrator    VP1                                  Kenneth Schumacher

**User is Authorized for**

☰ 🔍
1-4 of 4

*User ID	Description	Document Administrator	Reset to Dispatch	Bypass Approval		
<input type="text" value="ACALDER"/> 🔍	Alexis Calder	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
<input type="text" value="AL"/> 🔍	Al Approver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
<input type="text" value="TBG"/> 🔍	TBG	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
<input type="text" value="VP4"/> 🔍	Nancy Ball	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

<i>Field or Control</i>	<i>Description</i>
<b>User ID</b>	<p>Select users who can act on behalf of the current document administrator (listed at the top of the page) and perform certain document tasks.</p> <p>Use the corresponding check boxes to define the authorities for the user.</p>
<b>Document Administrator</b>	<p>Select this option to indicate that the user has administrative authority to author supplier contract documents. As a document administrator, a user can generate, re-create, refresh, check out, edit, and check in documents. You can select one or all tasks in this group box.</p> <p>Document administrators can also control the life cycle of a contract for authors, by submitting contracts for collaboration and approvals. Depending on how you are using document types, document administrators may include only contract specialists or may include a broader list of users who generate documents.</p> <hr/> <p><b>Note:</b> Any changes you make to this field will be reflected on the Document Administrator field on the "User Preferences - Supplier Contract Management Page" (Application Fundamentals).</p> <hr/>

<b>Field or Control</b>	<b>Description</b>
<b>Reset to Dispatch</b>	<p>Select this option to indicate that the user can reset a document to a <i>Dispatched</i> status. After a document has been completed between a supplier and customer, it is in an <i>Executed</i> status. At that status, the <b>Reset to Dispatch</b> button is available on the <a href="#">Document Management Page</a>. This feature is useful if you want to perform minor changes, such as correct typographical errors, in the current version of the document without processing an amendment.</p> <hr/> <p><b>Note:</b> Any changes you make to this field will be reflected on the Reset to Dispatch field on the "User Preferences - Supplier Contract Management Page" (Application Fundamentals).</p> <hr/>
<b>Bypass Approval</b>	<p>Select this option to indicate that the user can bypass approvals. In other words, the document can be automatically approved by this administrator.</p> <p>If your organization uses supplier contract approvals, there are steps required to approve a document. However, if necessary, a user can expedite the document if this option is selected for their user ID.</p> <p>When users have the authority to push a document through the approval process, a <b>Bypass Approval</b> button appears on the <a href="#">Document Management Page</a>.</p> <hr/> <p><b>Note:</b> Any changes you make to this field will be reflected on the Bypass Approval field on the "User Preferences - Supplier Contract Management Page" (Application Fundamentals).</p> <hr/>

## Delete User Preferences Page

Use the Delete User Preferences page (CS\_DELETE\_USRPREF) to remove user preference settings for a user (specifically, remove user preference settings that were defined on the User Preferences - Supplier contract Management and Authorized Document Access pages).



Navigation:




**Supplier Contracts > Supplier Contracts Setup > Delete User Preferences > Delete User Preferences**

This example illustrates the fields and controls on the Delete User Preferences page.

### Delete User Preferences

**Supplier Contracts Preferences to be Deleted**


1-3 of 3 

User ID	Name			
<input type="text" value="AERICKSON"/> 	Arthur Erickson	<input type="button" value="+"/>	<input type="button" value="-"/>	
<input type="text" value="CMONET"/> 	Claude Monet	<input type="button" value="+"/>	<input type="button" value="-"/>	
<input type="text" value="WMITCHELL"/> 	Wayne Mitchell	<input type="button" value="+"/>	<input type="button" value="-"/>	

<i>Field or Control</i>	<i>Description</i>
<b>User ID</b>	Select a user for whom you wish to remove user preferences.
<b>Delete</b>	<p>Click to run the delete user preferences process for the user.</p> <p>After you click the Delete button, you receive a warning asking you to confirm that you want to delete user preferences. You must select 'Yes,' to continue.</p> <hr/> <p><b>Note:</b> The deletion is permanent. Once you run the delete user preferences process, you cannot undo the results.</p>

## Chapter 5

# Setting Up Clauses and Sections in the Contract Library

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## Understanding the Contract Library

This topic discusses the contract library and provides a list of common elements.

### Contract Library

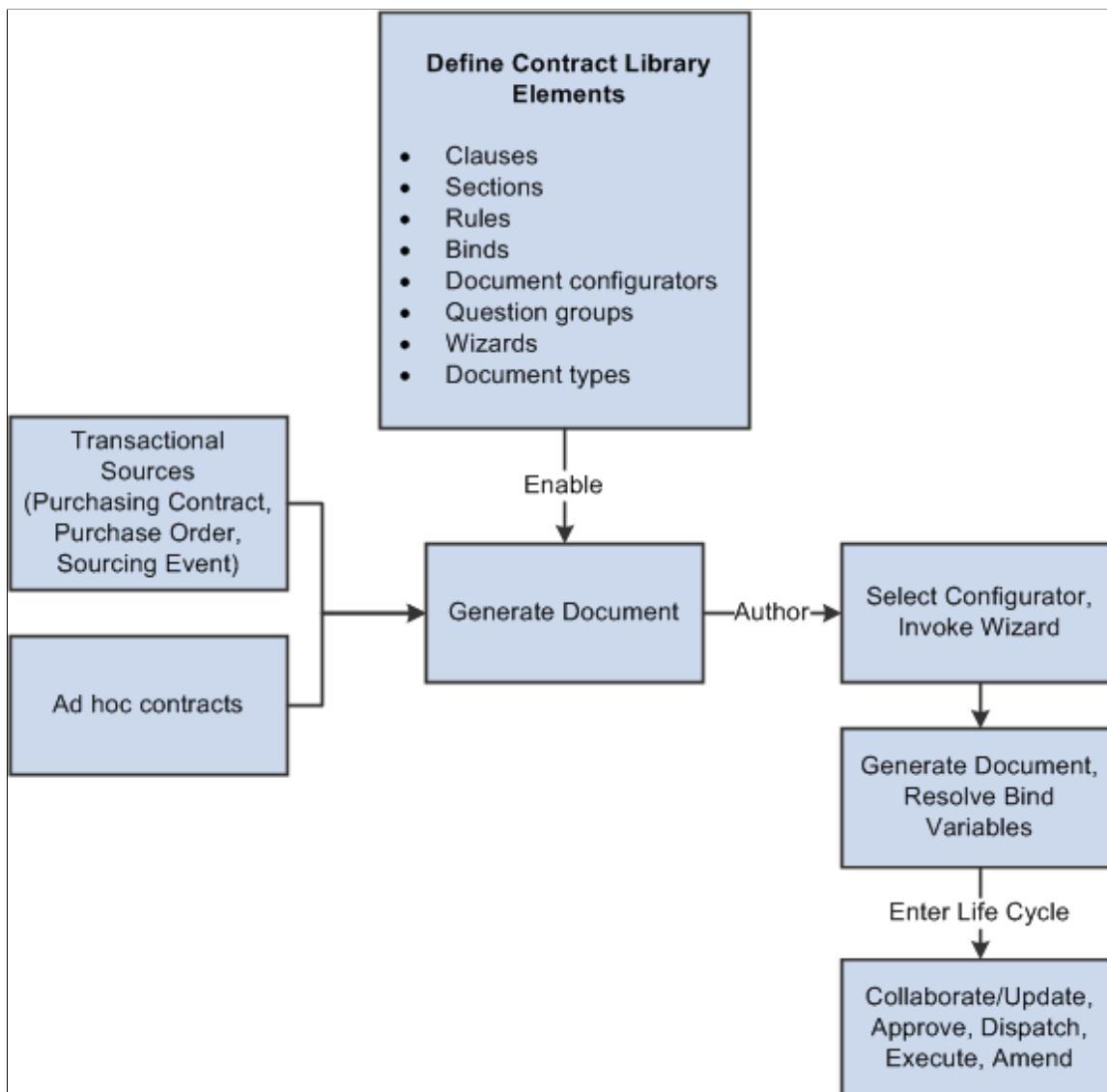
The PeopleSoft Supplier Contract Management document library is an authoring system that enables you to create, track, and reuse a variety of document elements. The contract library contains reusable components for the authoring system. When using the library, you can create reusable rules, clauses, and section elements. These elements are the building blocks of a document configurator, which can be used to generate a Microsoft Word document. Similar to clauses, sections, and rules, you can reuse document configurators. Documents that result from a configurator can have different structures based on the data that they contain.

The contract library and document management system combine transaction information, such as purchase order lines, with a document that is generated in PeopleSoft Supplier Contract Management. The system formats the document, inserts the appropriate contractual and legal wording for the given situation and agreements, and manages the approvals and execution of the contract.

Establishing document types in the contract library enables you to define criteria for creating a certain type of document. Document types help authors and clause librarians find the right document to meet their requirements. When you set up document types, you define settings, default values, and security for the document.

The contract library also provides a complete set of searchable contract elements. Among the types of searches that you can perform within PeopleSoft Supplier Contract Management are searches for clauses, sections, rules, document types, and bind variables. You can also search for document configurators and documents, and perform full-text and object-specific searches, such as class names, group names for clauses, and generated documents. This search capability enables you to combine searches for certain transactional data along with document search criteria, such as contract amount and item category. After completing a search, you can review the results and then select a value from the list of results that meets the search criteria.

This diagram illustrates how the system processes transactional or ad hoc contracts using the elements of the contract library. It illustrates how documents are generated and how a document enters its life cycle:



The document authoring system uses the elements listed in the Define Contract Library Elements box to generate a document. After the Microsoft Word document is available, you can perform authoring tasks and then place the document into its life cycle.

For additional information about each element of the Contract Library, see:

- [Setting Up Clauses.](#)
- [Setting Up Sections.](#)
- [Setting Up Rules.](#)
- [Setting Up Binds.](#)
- [Setting Up Document Configurators](#)
- [Setting Up Question Groups for a Wizard](#)



- [Defining Wizards](#)
- [Setting Up Document Types](#)

When setting up contract library elements and then testing authored documents, you can use PeopleTools Application Data Sets (ADS) to move data between a development environment, a test environment, and a production environment. For more information, see "Understanding the PeopleSoft Data Migration Workbench" (Application Fundamentals) and [Using the Supplier Contract Workbench](#).

## Common Elements Used Within the Library and Authored Documents

<i>Field or Control</i>	<i>Description</i>
<b>Approval Status</b>	<p>The approval status represents the availability of contract library elements, such as clauses, sections, or rules. If approvals have been enabled using the <a href="#">Installation Options - Supplier Contract Management Page</a>, then the system requires that clauses go through a formal approval process. Sections and rules are approved manually.</p> <p>When content is not approved, you can still reference, save, and preview the content within clauses, sections, and configurators. However, document generation requires that any content included in a document have an approval status of <i>Approved</i>, a status of <i>Active</i>, and an effective date that is equal to or prior to the begin date of the contract.</p>
<b>Cancel Check Out</b>	<p>Click to cancel the checkout of:</p> <ul style="list-style-type: none"> <li>• A clause from the <a href="#">Clause Definition Page</a>.</li> <li>• A section from the <a href="#">Section Definition Page</a>.</li> <li>• A document from the <a href="#">Document Management Page</a>.</li> </ul> <p>The system does not save updates that have been made to the document and resets the document back to the version that it was when it was checked out. The <b>Cancel Check Out</b> button is available only to the user who checked out the document.</p> <p>This button is available when a clause, section, or document has been checked out for editing.</p>
<b>Collapse Full Text</b>	<p>Click to reduce the amount of text that appears in the <b>Full Text</b> field. This button is available after you expand the <b>Full Text</b> field.</p>
<b>Delete</b>	<p>Click to delete the library object from the system. This button is only available if the object is not in use within another object or document.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Edit Document</b>	<p>Click to open a Microsoft Word document from the <a href="#">Document Management Page</a> that is associated with a clause or section. The system checks out the document for you to edit. Click the <b>Check In</b> button to upload the document after you make changes and save the document. You can also cancel the editing session by clicking the <b>Cancel Checkout</b> button.</p> <p>You can create Microsoft Word documents using the Clause Definition and Section Definition pages. When you enter text in the <b>Title</b> and <b>Full Text</b> fields and save the element, the system automatically generates the Microsoft Word XML document. You can also edit a document before you enter the title or full text information. When you check in a document, the system populates the fields from the Microsoft Word document.</p> <p>If you make changes to the title or full-text information using clause or section pages and then try to edit the document using Microsoft Word, the system displays a warning message explaining that the document has Microsoft Word formatting saved from an earlier edit or copy. If you edit the title on the PeopleSoft page, the system removes Microsoft Word formatting. You can click the <b>Yes</b> button to continue with the edit in the PeopleSoft Supplier Contract Management system or click <b>Cancel</b> to save the Microsoft Word formatting.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Effective Date</b>	<p>Select a date for which this element becomes effective. Effective dates are used to identify:</p> <ul style="list-style-type: none"> <li>• The state date for a section, rule, clause, dependent clause.</li> <li>• A document that is submitted for approval.</li> </ul> <p>When a document is generated, the current effective-dated version of an element can be active, but not approved. In this case, the system searches for a previous effective-dated row that is approved, to include in the generated document. The document generation process always uses the begin date of the source transaction to determine which effective-dated rows to include. The system provides a warning when a clause has been included in a document based on the effective date, but the clause has not been approved. Warnings appear in the generation log of the <a href="#">Document Management Page</a>.</p> <p>In most cases, when you refresh a document using the Document Management page, the system does not reevaluate the effective dates of clauses in the document. For example, if you change a clause in the library after you generate a document, but before you refresh it, the system does not pick up the clause change during the refresh.</p> <p>Exceptions to how the system reevaluates effective dates when refreshing documents include</p> <ul style="list-style-type: none"> <li>• When a rule was false and is now true.  In this case, the system includes new clauses from the library.</li> <li>• When a bind value changes anywhere in a repeating section.  In this case, the system re-creates the entire section in the document.</li> </ul> <p>In both of these cases, the system uses any changes to the library when the document is generated.</p> <p>See <a href="#">Refreshing and Re-creating Documents</a>.</p>
<b>Expand Full Text</b>	<p>Click to view a larger portion of the text that is contained in the <b>Full Text</b> field. Use the <b>Collapse Full Text</b> button to return to the normal view. You can edit clauses and sections using the <b>Full Text</b> field.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Preview Document</b>	<p>Click this button to open Microsoft Word preview files for a clause, section, or configurator. This button applies the Microsoft Word template and paragraph styles and provides an approximation of how the final generated document will appear. This document is read-only and cannot be checked in when you use this button. After closing the document, you do not have to initiate any other action to end the preview session.</p> <p>Microsoft Word integration enables formatted content, so you can preview the document in the same way that you would use the View feature in Microsoft Word.</p>
<b>Source Transaction</b>	<p>Select an option such as: <i>Ad Hoc</i>, <i>Multiple Sources</i>, <i>Purchase Orders</i>, <i>Purchasing Contracts</i>, or <i>Sourcing Events</i>.</p> <p>The <i>Multiple Sources</i> field value enables you to define a configurator that you can use for ad hoc, purchase order, purchasing contract, and sourcing event transactions. If you select <i>Multiple Sources</i>, then the Applicable Sources grid displays on the <a href="#">Document Configurator Definition Page</a> for you to select which source transactions to use with the configurator.</p>
<b>Spell Check</b>	<p>Click to initiate the Spell Check feature for entries in clause titles, section titles, and full text. You can also use check spelling by-reference text in clauses.</p> <hr/> <p><b>Note:</b> If the spell checker does not find a word that it questions, the system displays a message that no misspellings were found.</p> <hr/>
<b>Status</b>	<p>Represents a status of a clause, section, or rule, which relates to the effective date of the object. Options include:</p> <ul style="list-style-type: none"> <li>• <i>Active</i>: Indicates that the element is ready for use.</li> <li>• <i>Inactive</i>: Removes the element from consideration for use in the structure.</li> </ul> <p>This status is not the same as the <b>Approval Status</b> field, which relates to a document in the review cycle. It requires someone to review the wording of a clause, and indicate that it is approved and can be used in an authored document. You can manually control the approval status for clauses and sections or use the Approval Framework.</p> <p>Typically, the <b>Status</b> value is <i>Active</i> for all content that is not activated in the system. This option allows you to indicate that an approved clause is no longer active and should not be used in a document. The approval status (versus this status) controls the approval settings and use of content in generated documents. However, if you need to inactivate a clause or section, or make it temporarily unavailable, you can use this <b>Status</b> field by changing it to <i>Inactive</i>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Title</b>	Enter a title to use for a clause or section. The title serves as a heading for a document element. This is a required field and appears on the created document with the title format.
<b>Where Used</b>	<p>Click to find where this object is used in PeopleSoft Supplier Contract Management. When you click this link, the system opens the Search for All Content Instances page, where you can enter additional search criteria for the object.</p> <p>Where-used capability often enables you to traverse the system. For example, you can find:</p> <ul style="list-style-type: none"> <li>• All clauses that use a bind.</li> <li>• Sections that use a clause.</li> <li>• Configurators that use a section.</li> <li>• Documents that use a configurator.</li> </ul> <p>For more information about using where-used searches, see <a href="#">Performing Where-Used Searches</a>.</p>

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## Understanding Document Clauses

This topic discusses:

- [Clauses](#)
- [Clause Status, Approval Status, and Workflow](#)
- [Editing Clause Text](#)
- [Bind Variables and Repeating Clauses](#)
- [Table Clauses](#)
- [Dependent Clauses](#)
- [Alternate Clauses](#)
- [Microsoft Word Templates and Clauses](#)
- [Clause Imports](#)
- [Clause Libraries, Groups, and Classes](#)

### Clauses

Document clauses are the basic building blocks for document content. A clause typically represents a certain portion, paragraph, or paragraph grouping in a contract. After establishing clauses, you can

reference them directly in document sections to structure a document section for reuse. You can also reference the clause directly in document configurators and, optionally, indent them to accomplish the structure and appearance of a section in a configurator.

Before defining clauses, you should define appropriate classes to categorize clauses, and if you are using workflow, define approval types for workflow. If you do not have a clause library, then make sure you consider how and what you define as the content within clauses and the level of granularity. This is most important when considering clause approvals, because the approval level is defined at the clause level for both clause approvals and document approvals that use clauses in final documents.

You can create two types of clauses. The general clause is for normal document use. This topic mostly describes the use of general clauses. You use the table clause when you want to design, format, and insert Microsoft Word tables into a document. These tables contain a repeating row of information (bind) that you can expand within the table as part of document creation without repeating the clause itself in a contract document. Table clauses enable you retrieve transactional information such as an item list from purchase orders and purchasing contracts and then set up some basic summary calculations for field quantities and amounts expanded within a column. Tables are not as complex as spreadsheet macros, but enable some simple summing of amounts and quantities to be displayed in expanded table columns.

See [Table Clauses](#).

When you are using general clauses:

- You can list a table clause as an alternate for another table clause.

If required, you can use multiple rules directly on the configurator instead to determine which table clause it to be included.

- If the clause has repeating binds, you cannot attach a table clause with repeating binds at the same level, but you can attach a table with repeating binds at a lower level within the same hierarchy.

## Related Links

[Setting Up Clauses](#)

## Clause Status, Approval Status, and Workflow

Clauses have two statuses associated with them:

- The status for the clause.
- The approval status for the clause.

Because clauses are effective-dated, the clause status is typically *Active*.

You use the clause approval status to determine whether a new clause, or change to an existing clause for a specific effective date, is approved and can be used. When you add a new clause, or change an existing clause, the system applies an approval status of *Initial*.

## Editing Clause Text

Clause text fields can include user-defined text and bind variables. Use the [Clause Definition Page](#) to insert these elements directly into the clause using plain text. Plain text does not support formatting. You can also use this page to open the clause in Microsoft Word and edit the rich-text.

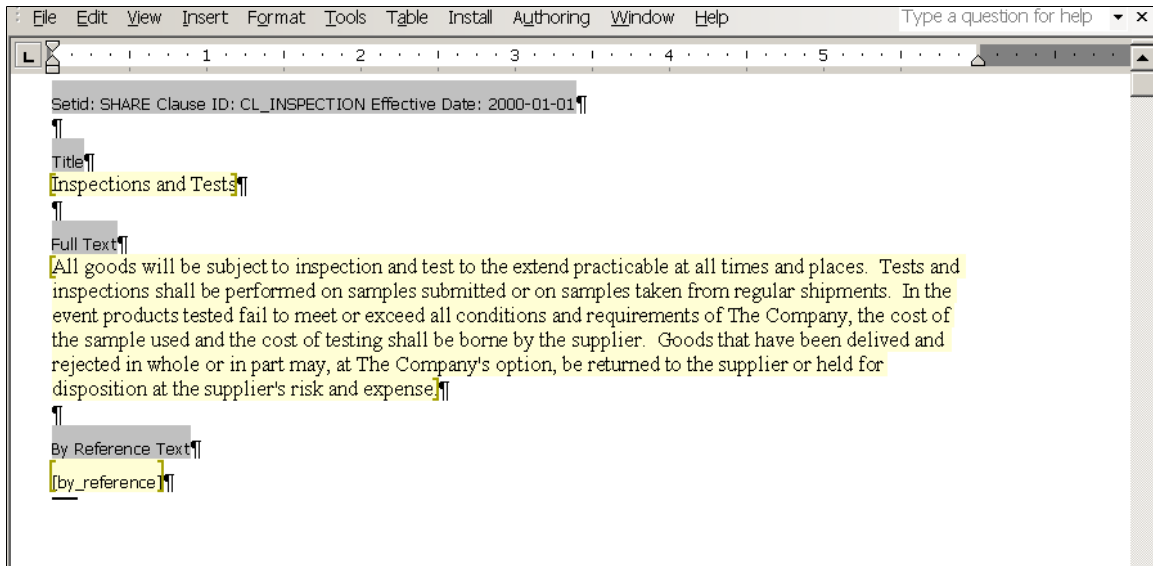
---

**Note:** When you define simple clauses, editing in Microsoft Word is not necessary because the system applies basic paragraph styles from the Microsoft Word template that has been set up on the [Document Format and Options Page](#). This setup can apply basic formats, such as body and number styles, using a consistent method for the entire contract. If you need to apply special character-based formats such as bold text, underlined text, italic text, or other rich-text formats, then you can edit the clause directly using Microsoft Word.

---

For additional information about formatting text within Microsoft Word so that it renders correctly using the preview feature and the final assembled document, see [Understanding Microsoft Word Integration with Supplier Contract Management](#).

This example illustrates how a simple clause might appear when you edit it using Microsoft Word.



When you edit a clause using Microsoft Word, only the title, full text, and by-reference text are included in the edit. The system does not include other values that appear on the PeopleSoft page for Microsoft Word maintenance. Only the clause content can be edited.

When you open a document using Microsoft Word, the system includes information about the clause. This information appears with instructional components with a gray background in the document and the structure of the clause and its contents. The displayed information includes the SetID, clause ID, effective date, and fields to which the text belongs.

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**Note:** Oracle does not recommend that you apply custom paragraph styles while editing in Microsoft Word. You should limit style changes to character styles, such as changing text to bold or underlining text.

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**Note:** The system enables Microsoft Word document protection for the clause to protect hidden tags used by PeopleSoft Supplier Contract Management and to recognize the title and text fields when checking-in the document. Protection can prevent you from performing certain format changes using Microsoft Word. In these cases, you can deactivate the protection, make the change, and then re-activate the protection Clause protection is determine by the Enforce clause protection during check in check box on the [Installation Options - Supplier Contract Management Page](#)

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## Microsoft Word XML Formatting

When the system generates the Microsoft Word document, the document is stored in .xml format instead of a .doc formatted template. You can view the XML content controls for the Microsoft Word document using the task pane in the document. To view content controls:

1. Select the Developer tab from the menu.

If you do not see the Developer tab, go to the Word Options, select *Popular* from the menu on the left, and then select the **Show Developer Tab in the Ribbon** check box on the right.

2. Select **Design Mode**.
3. Select **Structure**.

The Task Pane opens on the right side of your document and displays the XML Structure options.

4. Select the **Show XML Tags in the Document** check box to see the content controls.

The system displays the XML tags for the clause document.

Clauses contain titles, body, and by-reference text, which the system converts into a Microsoft Word XML document.

### Related Links

[Understanding Microsoft Word Integration with Supplier Contract Management](#)

## Bind Variables and Repeating Clauses

Clauses can include bind variables. The system resolves the binds and converts them to text when it generates the document.

Bind variables can be wizard binds or transaction binds. Wizard binds are user-defined variables that you create. Transaction binds can be linked to all source transactions. Transaction bind variables enable you to map values from transaction data into an authored document. For example, when the system generates a document, referencing the `%%CONTRACT_ID%%` bind variable can map the contract number from a purchasing contract transaction into a title clause.

Bind variables also have repeating attributes associated with them that are inherited by the clause or section in which they are used. For example, you can use repeating clauses for things such as an item description list by including the `%%ITEM_DESCR%%` bind variable within the clause title (or body). The bind variable `%%ITEM_DESCR%%` happens to repeat at level one because the item list is an immediate child record of the contract header, which is at level zero.

Therefore, you can define a clause to have this text: *This inspection process applies to %%ITEM\_DESCR%%*. When generating a purchasing contract that has three lines, this clause could appear as:

1. This inspection process applies to 4 Piece Saltwater Fly.
2. This inspection process applies to Rod and Reel Case Combo.
3. This inspection process applies to Travel Fly Rod.

In addition, you can nest repeating-level clauses and sections. For example, a dependent clause can be assigned to an existing parent clause that repeats level two data, such as contract milestones. This is a child record to the procurement transaction contract line in the parent clause. When nesting repeat



structures, the system uses the proper child repeating clauses with the immediate parent by checking the level and key structures of each bind variable.

---

**Note:** Proper setup of nested repeating structures requires some technical expertise. PeopleSoft Supplier Contract Management provides a set of transactional binds for source transactions. Wizard binds are less complex and do not use repeating structures, so they are always at a level zero.

---

A clause can stand alone, be used as a dependent clause, or be used as an alternate clause. Dependent clauses are associated with a primary clause. Alternate clauses are used instead of a primary clause.

## Related Links

[Setting Up Binds](#)

[Table Clauses](#)

[Dependent Clauses](#)

[Alternate Clauses](#)

## Table Clauses

Clauses can be used with Microsoft Word tables. Table clauses enable you to create a table in Microsoft Word and then populate the table with information from a transaction when the document is generated. Table clauses also enable you to sum columns in the table using a SUM pseudo bind format. Therefore, when the system resolves bind variables and populates the table, it also calculates amount totals for columns that include the pseudo bind.

A pseudo bind is an existing bind with the \$\$ symbol before and after the bind, instead of the typical % bind symbol. You use the pseudo bind to instruct the document generator to provide a sum of all table rows where that same bind name occurs as a regular bind. If you use the pseudo bind construction with a nonnumeric bind, it treats the bind as regular text and doesn't SUM .

You can use other clause features including a title and clause text before and after the table. The system displays the repeating objects in a tabular format.

---

**Note:** After you define a clause as a table clause type, you cannot change the clause type.

---

Using table clauses you can:

- Control the format of the table, such as style and column width.

Use the **Edit Document** button to access the Microsoft Word document and create the table. This enables the available Microsoft Word formats.

- Enter text and select binds for the table before the system displays the table.

You can use the existing **Title** field on the clause for the text.

- Display the title and explanatory text for the table, when you view the document.

When you use Microsoft Word, you can add and format text before and after the table. This text prints in the final document because it was formatted in the Microsoft Word document.

- Calculate totals for table columns.

This calculation uses a pseudo bind format and only calculates sums. When an existing bind name is wrapped with a \$\$ tag, such as \$\$MERCHANDISE\_AMT\$\$, it means that the system should provide the sum of all values for that field in the table. You can place the bind anywhere in the table, but typically you should place it above or below the corresponding bind name.

When the system creates the document, it determines the bind variable by removing the \$\$ tag and sums the amount for all rows of that bind name in the table. The summing pseudo bind calculates sums for an entire column. It does not perform subtotaling.

The system does not log this bind format like normal binds. You cannot edit this reserved bind when you are editing the clause. The system cannot ensure that a bind was entered using a numeric bind. If the pseudo bind is used against an inappropriate bind, such as a nonnumeric bind, the system ignores it.

- Calculate totals for table rows.

The system provides some delivered binds that show the sum of amounts within a table row. For example, the bind PO\_FREIGHTTAXMISC provides a sum of the freight, tax, and miscellaneous amounts for a purchase order line. If you want to see this sum, you do not need to use a pseudo bind, instead you can use this bind that is provided by the system. You can find these binds by accessing the [Bind Mappings Page](#).

- Suppress repeated key information.

You can limit duplicate key values in a table using the [Clause Definition Page](#). This is useful when redundant information, such as item ID or item description, is presented across different lines in a table.

---

**Note:** You cannot create table clauses when you import objects.

---

## Steps for Creating Table Clauses

Use these steps to create a table clause:

1. Create a clause using the *Table* value in the **Clause Type** field.
2. Load binds into the body of the clause by clicking the **Add Variables** button.

You can use these binds to populate table cells. Binds that you load must be mapped to a transaction. The system requires at least one repeating bind in a table clause so that it can expand the data when the document is created. You can find the repeating binds by accessing the [Bind Mappings Page](#) and selecting binds where the **Level for the Source Record** field is one or greater.

Make sure you select the **Full Text** check box when you add the variable so that the value is placed in the **Full Text** box of the clause body. After you add the variables and save the clause, the system automatically selects the **Repeating Objects** check box if you have repeating binds in the clause. In addition, when you save the table clause, the system validates the clause and provide error messages when errors occur.

3. Click the **Edit Document** button to access the Microsoft Word version of the document.
4. Make document edits and insert a table in the document.

Before you can use the table clause, you must insert a table in the Microsoft Word document. After inserting the Microsoft Word table, you can move column and row information into the table cells. This includes moving the bind variables into their appropriate cells. In the table clause there should be one row with the repeating bind value . For example, you might create a Microsoft Word table that has one row that has the Item ID, Description, and other needed information at that level for the item. When the document is created, the system expands this row to include all items included (repeated) that come from the contract transaction. You can also edit the clause title and place text before and after the table.

5. Save the document and check it into the clause library.

After establishing clause values, you can use the clause in an authored document. When you generate a document, the system retrieves information from the source transaction, and applies the values and summations that you defined in the clause.

### Table Clause Examples

When you define table clauses, you can use the \$\$ tag multiple times to enclose summation values.

This example illustrates how bind variables can appear in a Microsoft Word document before they are resolved:

Item ID	Shipto	Due Date	Quantity	Price	Amount	Tax	Freight	Total Amount
%%ITEM%%	%%SHIP%%	%%DUEDT%%	%%QTY%%	%%PRC%%	%%AMT%%	%%TAX%%	%%FRT%%	%%SCHSUM%%
<b>TOTALS</b>	\$\$SHIP\$\$		\$\$QTY\$\$	\$\$PRC\$\$	\$\$AMT\$\$	\$\$TAX\$\$	\$\$FRT\$\$	\$\$SCHSUM\$\$

Consider these points when defining table clauses in Microsoft Word:

- All binds from the same bind mapping record must be on the same row of the table.  
For example, tax and freight are on the same record.
- When you are using long bind names, you need to specify fixed column widths when you build the table, so that the bind names can wrap.

The final results display wrapped when necessary within the columns that you specify.

This example illustrates how a table clause can appear after binds have been resolved for a Microsoft Word contract document:

Item ID	Shipto	Due Date	Quantity	Price	Amount	Tax	Freight	Total Amount
10000	US001	04/15/07	10.000	5.000	50.00	3.50	1.00	54.50
		04/28/07	10.000	5.000	50.00	3.50	1.00	54.50
	US004	04/28/07	100.000	5.000	500.00	35.00	5.00	540.00
10007	US004	04/28/07	20.000	35.000	700.00	49.00	15.00	764.00
	US005	04/20/07	2.000	500.000	1000.00	70.00	10.00	1080.00
<b>TOTALS</b>			142.000		2300.00	161	32.00	2493.00

This example illustrates how you can use the **Suppress Duplicate Keys** check box and the **Last Key Field Column** field to suppress duplicate values. In the example, the Item ID and Shipto columns have been suppressed. This table was defined by selecting the **Suppress Duplicate Keys** check box and entering 3 in **Last Key Field Column** field. Starting with the Due Date column, table values are not suppressed.

When you define the table, you can bold fields such as the Totals row. You can apply formatting on the fixed part of the table. If you format a bind, the system applies the same formatting when it resolves the bind.

---

**Note:** In this example, the table amounts do not line up by decimal points. You can right justify columns in Microsoft Word to correct this.

---

## Table Clause Errors

Several conditions exist that produce system errors and warnings when using table clauses. When there is a problem validating a table clause, the system displays many of the errors above the **Title** field. Error conditions include:

- When you generate a document with a table clause, but a table does not exist in the full text portion of the clause, the system generates the document with the table clause repeated.
- When you create a table clause and there are no repeating binds.
- When you add a table clause to a rule, and you enter reference text.
- When you attach a table clause to a rule,.
- When you use a nonnumeric bind name as a pseudo bind in a table clause, the system allows the entry, but ignores the bind when it generates the document.
- When you use a nonexistent bind name as a pseudo bind in a table clause, the system allows the entry, but ignores the bind when it generates the document.

## Related Links

[Setting Up Clauses](#)

## Dependent Clauses

A dependent clause is a clause that is linked to a parent clause. When you include the parent clause in a section or configurator, the system includes the dependent clause that is linked to the parent clause. Dependent clauses appear below a parent clause in the Microsoft Word document. You can use dependent clauses independently, but they are always mandatory when you link them to a parent clause.

You create dependent clauses the same way that you create any clause. A clause becomes a dependent clause only when you add it to the **Dependents** section of the [Clause Definition Page](#).

To associate a dependent clause with a parent clause, the dependent clause must have an effective date that is equal to or before the effective date of the parent clause. This enables you to change the parent clause content and structure over time, and include different structures and content based on the contract start date.

Dependent clauses are approved separately from parent clauses, but their approval status appears on the Status tab of the [Clause Definition Page](#). When you create a parent clause, being able to view dependent clauses assists in the approval process of the parent clause.

## Alternate Clauses

An alternate clause is used as a substitute for a parent clause. Similar to a dependent clause, you create an alternate clause the same way that you create a parent clause. A clause becomes an alternate clause when you add it to the **Alternates** grid on the [Clause Definition Page](#). Alternate clauses enable you to specify clauses that can be selected manually, as an alternate, from the Research task pane in Microsoft Word.

The system can automatically include alternate clauses based on alternate rules. Two examples are:

- You can have two standard address clauses that are used in an ad hoc contract.

One address clause uses two lines and the other uses three lines. Depending on responses to wizard questions, the system determines whether to use the two-line or three-line clause for formatting purposes. You can define the three-line clause as the default clause. Then, when the contract is generated the system collects address-line values based on wizard responses. The system finds a rule that recognizes the wizard response for a two-line clause, and automatically switches the three-line clause to the two-line clause in the document.

- Another example of switching to alternate clauses includes working with specific suppliers. In this example, a wizard response determines the supplier based on an alternate rule. The supplier value comes from a bind value such as `VENDOR_ID`.

If an alternate rule is not defined using the Rule tab on the Clause Definition page, the system uses these standards to process alternate clauses:

- If the system adds the clause to the document configurator, it does not use the alternate clause when the document is generated.
- When you use the Microsoft Word - Task Pane to search for clauses, the system lists the alternate clauses and allows the author to select them.

When you use alternate clauses and a document is generated:

- If the main clause is used, then the main dependents are used.
- If an alternate clause is used, then the alternate dependents are used.

Alternate clauses can include bind variables, but cannot contain bind variables that repeat.

See [Bind Variables and Repeating Clauses](#).

Alternate clauses can have dependent clauses that are used in a document the same way as dependent clauses.

### Related Links

[Understanding Microsoft Word Integration with Supplier Contract Management](#)

## Microsoft Word Templates and Clauses

When a document is previewed or generated, the system uses the Microsoft Word template and setup definitions to determine which paragraph style and outline numbering to associate with the clause. In addition, the system preserves special character formats such as making characters bold or underlining a word.

The system applies these paragraph styles for any clause content that does not have explicit override paragraph styles or lists within the clause. Setting up Microsoft Word templates requires a working knowledge of Microsoft Word, paragraph styles, and requires special consideration when users can edit clause content and override styles.

## Clause Imports

The Import Clause feature enables you to import a single clause or a group of clauses into the contract library. See [Importing Clauses and Sections](#).

## Clause Libraries, Groups, and Classes

### Clause Libraries

Clause libraries are used to define a broad grouping of contract clauses. A library code is used to define a clause library. Individual clauses can belong to only one library code. Library codes categorize a complete set of clauses. Library codes can be used as search criteria when searching for clauses.

### Clause Groups

Clause groups are used to organize and categorize clauses. For example, you can have a group of clauses relating to indemnification for work that is performed at the buyer's site.

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**Note:** Unlike clause libraries, a clause can belong to more than one clause group.

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### Clause Classes

Clause classes provide another user-defined method of categorizing clauses, particularly for the purposes of clause approvals. Each class contains a description and an optional list of approval types. This includes a default that enables you to define how the clauses of that class are to be approved.

When you create a new clause, you must specify a class. If the class has a default approval type, it is used as the approval type value for the clause. This can be overridden on the [Clause Definition Page](#). However the only approval types available to be used on the clause are those that are specified for the class.

### Related Links

[Library Definition Page](#)

[Group Definition Page](#)

[Clause Class Page](#)

## Setting Up Clauses

### Pages Used to Set up Clauses

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Clause Definition Page</a>	CS_CLAUSE_DEFN	Define clause information, dependent clauses, alternate clauses with related rules, and submit clauses for approval.
<a href="#">Library Definition Page</a>	CS_LIBRARY_DEFN	Define clause libraries.
<a href="#">Group Definition Page</a>	CS_CLS_GROUP_DEFN	Define clause groups.
<a href="#">Clause Class Page</a>	CS_CLS_CLASS	Set up classes for document clauses.
<a href="#">Copy Information From Page</a>	CS_OBJS_COPY_SP	Create a clause by copying the clause from an existing clause.
<a href="#">Associate to Clause Group Page</a>	CS_ASSOC_CLSGRP_SP	Associate clauses with clause groups.
<a href="#">Add Bind Variables to Content Fields Page</a>	CS_OBJ_ADDDBINDS_SP	Add a bind variable to the content of a clause.
<a href="#">Clause Approval Status Page</a>	CS_CLS_APPROVAL	Preview clause approvals.

### Clause Definition Page

Use the Clause Definition page (CS\_CLAUSE\_DEFN) to define clause information, such as defining dependent clauses and defining alternate clauses and related rules, and to submit clauses for approval.

Navigation:

**Supplier Contracts > Manage Contract Library > Clause Definition**

This example illustrates the fields and controls on the Clause Definition page: Details tab (1 of 2).

This example illustrates the fields and controls on the Clause Definition page: Details tab (2 of 2).

Use this page to define clauses. You can define alternate and dependent clauses, as well as associate clauses with clause groups. Clauses are used when creating documents. You can create clauses using this page, or using Microsoft Word, which can be used to edit rich-text .

When you insert a clause into a section or document configurator, the content format value for the section or configurator determines whether text is used from the **Full Text** field or the **Reference Text** field. Use the **Reference Text** field to enter simple, or abbreviated, text strings for the clause instead of the entire text in the **Full Text** field.

<b>Field or Control</b>	<b>Description</b>
<b>Copy From</b>	Click to access the Copy Information From page. The button is available when you are adding a clause, and it enables you to copy an existing clause to create a new clause. When you click this button, the system provides a list of existing clauses.



<b>Field or Control</b>	<b>Description</b>
<b>Associate to Clause Group</b>	<p>Click to access the <a href="#">Associate to Clause Group Page</a>, where you can associate the clause with a clause group. By grouping clauses, you can use them when performing clause searches.</p> <p>For additional information about Clause Groups, see <a href="#">Clause Libraries, Groups, and Classes</a>.</p>
<b>Clause Type</b>	<p>Select a value to indicate the type of clause you are adding. This field is only available when you are adding a clause. After making a selection, you cannot change the clause type. Values include:</p> <ul style="list-style-type: none"> <li>• <i>General</i>: Indicates that the clause is for normal use. and is the default value for the field.</li> <li>• <i>Table</i>: Indicates that the clause is to be used with tables.</li> </ul> <p>This functionality enables you to set up and use tables in documents. Make sure that a table exists as a Microsoft Word document before you select <i>Table</i>. See <a href="#">Table Clauses</a>.</p> <hr/> <p><b>Note:</b> When you save a table clause and there are no repeating binds defined for the table clause, then the system displays a warning that you cannot use the table clause, but you can save it.</p>
<b>Library</b>	<p>Select a library to which you want to assign this clause. You use libraries to group contract clauses and develop an authoring document infrastructure that can support complex solicitation and documents.</p> <p>For additional information about Clause Libraries, see <a href="#">Clause Libraries, Groups, and Classes</a>.</p>
<b>Class Name</b>	<p>Select the clause class with which you want to associate this clause. You use classes to group similar clauses for searches. <b>Class Name</b> is a required field and determines the approval types that are available for the clause.</p> <p>For additional information about Clause Classes, see <a href="#">Clause Libraries, Groups, and Classes</a>.</p>
<b>Approval Type</b>	<p>Click to select an approval type, which is used when approving clauses. The system bases the available options on the approval types that have been defined for the class name that you selected. Approval types control the approval routing that the clause requires the clause usage within documents. The system can provide a default value for the approval type based on the associated class name.</p> <p>See <a href="#">Setting Up Approval Types</a>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Notes</b>	Enter informational text that is related to this clause. The system does not use the text when validating the clause.

### Clause Attributes Per Effective Date

<b>Field or Control</b>	<b>Description</b>
<b>Effective Date</b>	<p>Select an effective date. Clauses are effective-dated to retain a history of clause text and approvals, and to make changes to clauses without affecting terminology in existing documents.</p> <p>When a document is generated, the system uses the start date of the contract to determine which clauses to include in the document. When you change a clause, you should add a new effective-dated row that represents the date that you want to start using the clause in new contracts. When you add new effective-dated rows for the clause, the system assigns the new row an approval status of <i>Initial</i>.</p> <hr/> <p><b>Note:</b> Clause librarians should include the <b>Correct History</b> option in rows of history in clause maintenance, especially when new effective-dated changes are commonly added as of today.</p> <hr/>
<b>Status</b>	<p>Select a status to assign to the clause. This is a required field for all effective-dated records in PeopleSoft Supplier Contract Management. Options include:</p> <ul style="list-style-type: none"> <li>• <i>Active:</i> Indicates that the clause is available to be used in documents as long as the Approval Status is <i>Approved</i>.</li> <li>• <i>Inactive:</i> Deactivates a clause, phases out a clause, or puts a clause on hold.</li> </ul> <p>This prevents the clause from being included in new documents.</p>
<b>Edited via Word Application</b> (edited using Microsoft Word application)	<p>Displays as selected if the clause was checked out and edited in Microsoft Word. If the check box is selected and disabled, the document was edited.</p> <p>This indicates that you may have rich text associated with the clause and if you make text edits using this page, then the rich text edits will be lost. If you attempt to edit the document, the system displays a warning.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Where Used</b>	<p>Click to identify where this clause is used, which includes sections and document configurators.</p> <p>For additional information about Where Used searches, see <a href="#">Performing Where-Used Searches</a>.</p>
<b>Numbered Clause</b>	<p>Select to indicate that the clause title is to be numbered in the Microsoft Word document. The clause title is numbered according to the default numbering style that is defined on the <a href="#">Document Format and Options Page</a>. This check box is selected as the default setting.</p> <p>An example of numbered clauses is:</p> <ol style="list-style-type: none"> <li>1. Introduction</li> <li>2. Opening paragraph</li> </ol> <p>Deselect this check box to indicate that the clause is not numbered in the document or preview document. For example:</p> <p>Introduction Opening paragraph</p>
<b>Insert Page Break Prior</b>	<p>Select to begin the clause on a new page. The document will contain a page break prior to this clause. This is useful when you are creating signature pages for the contract.</p>
<b>Protect in Document</b>	<p>Select to indicate that the clause should be protected in a document. This means that the clause is read-only when you generate the document. This feature enables you to specify that a clause is protected on a clause-by-clause basis when you check in a document.</p> <p>When you select to protect a clause, the system displays that the clause is protected in the <b>Content Elements</b> grid on the <a href="#">Document Configurator Definition Page</a>.</p> <p>If a clause is protected and the protection is removed using Microsoft Word, and then the document is checked in, the system issues a warning that the clause is protected in the library but was changed in the edited document.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Suppress Duplicate Keys</b>	<p>Select to suppress duplicate keys in a table clause. When you suppress duplicate keys, the system clears the cell value if the bind value is identical to the value in the previous cell. For example if an item ID is the same for five rows, the system only displays the item ID value in the first row of data.</p> <p>When you select this check box, the <b>Last Key Field Column</b> becomes available where you can define the last column to which you want to suppress duplicate values.</p>
<b>Last Key Field Column</b>	<p>Enter the column position of the last key field in a table clause. A key field is a table column value for a specific field of data. When you define the last column, the system only suppresses duplicate fields for columns up to and including the column indicated by the value that you enter. See Table Clause Examples in the <a href="#">Table Clauses</a> topic.</p>
<b>Repeating Object</b>	<p>Displays as selected when the clause is repeating in nature. The system determines whether this check box is selected based on the bind variables that are included in the clause. If the system detects a bind variable that repeats, such as <code>%Item ID%</code> (level one) in the clause title or text, then it displays this check box as selected. This check box is typically deselected for most clauses. However, because special rules and edits can be applied as repeating objects, knowing when an object repeats is helpful.</p> <p>When you are adding a table clause, the system automatically selects this check box.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Approval Status</b>	<p>Select or view the approval status for the clause. Options include: <i>Approved</i> and <i>Initial</i>.</p> <p>This field is display-only if you are using the Approval Framework to approve clauses. When you use the Approval Framework process, the system automatically updates this field. Using the Approval Framework process is determined by selecting the <b>Clause Approval</b> check box on the <a href="#">Installation Options - Supplier Contract Management Page</a>.</p> <p>This field is available if the <b>Clause Approval</b> check box is not selected on the Installation Options page. This also indicates that clauses are approved manually. The value that appears by default is established in the <b>Default Clause Status</b> field on "User Preferences - Supplier Contract Management Page" (Application Fundamentals). To save time when approving clauses, you can provide the clause librarian the ability to create a clause that is already in an <i>Approved</i> status. This option is also used when a librarian checks out and edits a document. The system changes the status back to <i>Approved</i> upon check-in.</p> <p>The approval status is determined for each effective-dated row of the clause because each row acts as a new version of the clause. If the system requires approvals, each effective-dated row of the clause must be submitted for approval unless the clause librarian has the ability to approve clauses.</p> <p>Clause librarians who can approve clauses can have the system automatically update the clause status for newly copied, created, or edited clauses. The system validates the structure of a clause before it saves or submits the clause for approval. If a clause structure is not valid, the system displays a message and applies the <i>Initial</i> clause status, regardless of the values on the User Preference - Supplier Contract Management page.</p> <hr/> <p><b>Note:</b> If you are approving a table clause, the system requires that the Microsoft Word document contains a formatted table. After you create the table, you can change the clause status to <i>Approved</i>.</p> <hr/> <p>See <a href="#">Approving Clauses</a>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Validate Variables</b>	<p>Click to verify that bind variables in the clause exist, and if repeating binds also exist that they are being used correctly. This process is similar to saving the clause, except that validating bind variables enables you to verify the binds of the clause without saving it.</p> <p>The validation also checks that the bind variables are valid and that the dependent clause relationships in the clause are valid when repeating binds are used. These validations ensure that any dependent clause structures that might repeat contain repeating binds with the proper levels and internal key structures relative to binds that the system uses in the main parent clause.</p> <p>If errors occur with this process, the system populates the <b>Errors</b> grid with the issues.</p>
<b>Add Variables</b>	<p>Click to search for and add bind variables to the clause title, full text, or reference text. The purpose of adding a variable is to designate a location within the clause that the system uses to place an actual transaction or wizard value when it generates the document.</p> <p>When you add bind variables using this button, the system places variables at the end of any text within the field to which you are adding the bind. If you know which bind variable to use, you can alternatively type it directly into the clause title, full text, or reference text without using this button.</p> <hr/> <p><b>Note:</b> After you edit the clause in Microsoft Word, you should not use this button. This changes the value in the PeopleSoft page and causes you to lose Microsoft Word formatting you may have made to the clause.</p> <hr/> <p>See <a href="#">Add Bind Variables to Content Fields Page</a>.</p>
<b>Preview Document</b>	<p>Click to open the clause in a read-only mode using Microsoft Word. When creating the document, the system applies paragraph-style formats from the Microsoft Word template that is defined for the SetID. The preview also expands dependent clauses.</p> <hr/> <p><b>Note:</b> Numbered clause previews always start with the first number in the Microsoft Word numbering scheme; however, when the system generates the final document, the numbers can change based on positions in the document.</p> <hr/>

<b>Field or Control</b>	<b>Description</b>
<b>Edit Document</b>	<p>Click to edit clause content using Microsoft Word. Before editing documents, you should understand Microsoft Word functionality and integration with PeopleSoft Supplier Contract Management to help you create the contract library.</p> <p>When you click this button, the system displays the <b>Checked Out By</b> and <b>On</b> fields, and creates a Microsoft Word document that includes the title, full text, and reference text fields. You must save this file to a local location before you check the document back into the PeopleSoft system. The system creates a default file name with the SetID, clause ID, and effective date of the clause that is being edited as part of the file name.</p> <p>While you can apply custom formats using Microsoft Word, you should use the Microsoft Word template and paragraph styles to process formats when previewing and generating the document. This formats numbers and content consistently for finished documents.</p> <p>See also <a href="#">Protected Areas</a> and <a href="#">Editing Clause Text</a>.</p>
<b>Checked Out By</b>	Displays the user ID of the person who has checked out the clause and is editing it.
<b>On</b>	Displays the date that the clause was checked out to be edited.
<b>Cancel Checkout</b>	<p>Click to cancel the checkout of a clause without checking in any changes.</p> <hr/> <p><b>Note:</b> If you saved a local version of the clause, it remains on the local client system.</p> <hr/>
<b>Check In</b>	<p>Click to check in the Microsoft Word version of the clause.</p> <p>This process uploads the Microsoft Word version of the clause so that the PeopleSoft system is aware of the rich formatting that you added for the clause. To check in the clause, load the file from the location that you selected when you clicked the <b>Edit Document</b> button. The system validates the file you select to ensure that it is an XML file and that it has embedded keys that identify it as the clause that was originally checked out.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Preview Approvals</b>	<p>Click to view approvers for the clause. This button is only available when the <b>Clause Approval</b> check box is selected on the <a href="#">Installation Options - Supplier Contract Management Page</a>. When you click this button, the system opens the <a href="#">Clause Approval Status Page</a>, where you can review information about approval stages, paths, and who is reviewing or approving the clause.</p>
<b>Submit for Approvals</b>	<p>Click to initiate the approval process for the clause. This button is only available when the <b>Clause Approval</b> check box is selected on the <a href="#">Installation Options - Supplier Contract Management Page</a>. When you enable clause approvals, the system uses a more formal process for users to review, modify, and approve the clause. The system notifies approvers and reviewers when the clause is waiting for their approval.</p> <p>For clauses that do not require approval, the system displays a secondary page stating that approval is not required, and automatically approves the clause.</p> <p>See <a href="#">Setting Up Approval Types</a> and <a href="#">Approving Clauses</a>.</p>
<b>Approval Details</b>	<p>Click to access the <a href="#">Clause Approval Status Page</a>, where you can review information about a clause that has already been sent for approvals or has already been approved. This link is only available when the <b>Clause Approval</b> check box is selected on the <a href="#">Installation Options - Supplier Contract Management Page</a>.</p>
<b>Title</b>	<p>Enter descriptive text that identifies the content of the clause.</p>



<b>Field or Control</b>	<b>Description</b>
<b>Full Text</b>	<p>Enter the text to use for a clause. When a clause is used in a section, configurator, and so on, you can specify whether it is full text or reference text, but not both. The text becomes a part of the document when you use this element to generate the document.</p> <p>Click the <b>Expand Full Text</b> button to view a larger portion of the text. You might have to scroll to see all of the text. Click the <b>Collapse Full Text</b> button to reduce the viewing area.</p> <p>Typically, if you have a simple clause that does not have special formats, then you can use PeopleSoft pages to create the clause, and use the Microsoft Word template that is associated with the configurator to control standard numbering, bold text, title font sizes, and text. If you require more specific formats, then leave the <b>Title</b> and <b>Full Text</b> fields blank and edit directly in Microsoft Word. See also <a href="#">Editing Clause Text</a> and <a href="#">Understanding Microsoft Word Integration with Supplier Contract Management</a>.</p> <hr/> <p><b>Note:</b> You should not cut and paste from a Microsoft Word document directly into PeopleSoft pages. Some Microsoft Word characters do not translate correctly. If you do cut and paste into the PeopleSoft page, you need to review the text and clear any format issues with the clause in PeopleSoft Supplier Contract Management, or edit the clause in Microsoft Word.</p> <hr/> <p>See <a href="#">Character Limitations</a>.</p>
<b>Reference Text</b>	<p>Enter text that is considered to be a reference to additional information concerning the clause. Use this field to reference another, existing clause within your library, instead of using, or repeating, the full text of the existing clause.</p> <p>For example, you are creating a document that relates to hazardous materials. In addition, you have an existing clause in your library about the Federal Acquisition Regulation (FAR) 52.223-3 Hazardous Material Identification and Material Safety Data. Instead of repeating the existing FAR clause text within your new clause, you can reference the text using this field.</p> <hr/> <p><b>Note:</b> If you are creating a table clause, you cannot use reference text. You must use the <b>Full Text</b> field for table clauses.</p> <hr/>

## Dependents - Details

Use this section to include a list of mandatory clauses that accompany the primary clause. If you add this primary clause to a section or document configurator, dependent clauses that are listed in this section will appear after the primary clause when the system generates the document. Dependent clauses appear as indented children below the main clause when displayed in the document configurator and in the generated word document, depending on how paragraph styles and indentation is specified for outline numbering related to the paragraph style.

You cannot select a primary clause to be its own dependent clause. However, dependent clauses can have dependents that also have dependent clauses. The system checks for looping situations and adjusts them during the document generation process.

For general information about dependent clauses, see [Dependent Clauses](#).

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Sequence</b>	Enter a value that represents the order in which the system should use dependent clauses. The lowest value is the first clause to be used after the primary clause when the system generates the document.
<b>Numbered</b>	<p>Select to make this dependent clause a numbered clause that follows the primary clause. This check box is available when you select the <b>Numbered Clause</b> check box for the primary clause. If the check box is disabled, the primary clause is not a numbered clause and, therefore, the dependent clause cannot be numbered.</p> <p>If you select the <b>Numbered Clause</b> check box, then you can decide whether you want to continue that numbering scheme for dependent clauses. This field enables you to determine which dependent clauses are numbered.</p> <p>A number scheme can be different in these two scenarios:</p> <ul style="list-style-type: none"> <li>• When previewing a document, the system determines whether clauses are numbered based on the paragraph style and outline numbering scheme that is defined in the default Microsoft Word template that is associated with the SetID.</li> <li>• When generating a document, the system determines how a clause is numbered based on the paragraph style and outline numbering scheme for the Microsoft Word template that is associated with the document configurator.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Content ID</b>	Select a clause to use as a dependent clause for this primary clause. When you select the dependent clause, the system uses it along with the primary clause to generate the document. You cannot select the primary clause. For a clause to be valid, it must have at least one effective-dated row that exists on or before the effective date of the primary clause.
<b>Description</b>	Displays the description of the clause to use as the dependent clause for the current clause that you are maintaining. Click the <b>Description</b> link to access the Clause Definition page, where you can view or maintain the dependent clause.
<b>Content Format</b>	Select how you want to represent the text in the document when you use this dependent clause: <ul style="list-style-type: none"> <li>• <i>Full</i>: Enter the full text for the dependent clause so that it becomes part of the document.</li> <li>• <i>Reference</i>: Use the reference text that is defined in the dependent clause.</li> </ul>


## Dependents - Statuses

<b>Field or Control</b>	<b>Description</b>
<b>Effective Status</b>	Displays whether the dependent clause is at an <i>Active</i> or <i>Inactive</i> status. You cannot select a clause that is inactive; however, if the clause is being updated and has been changed to an <i>Inactive</i> status since it was added as a dependent clause, then this message informs you of the change. If the clause is inactive, the system does not use it in the document as a dependent clause, and does not display an approval status.
<b>Approval Status</b>	Displays the current state of approval for the dependent clause. The states are <i>Initiated</i> , <i>Pending</i> , and <i>Approved</i> . You can assign a dependent clause regardless of its effective or approval status. If the dependent clause has been changed to an <i>Inactive</i> status, the system does not display an approval status.  To check whether a dependent clause has been approved using clause workflow approvals, use the clause Approval Status page. This page provides useful information because you can submit dependent clauses separately for approval, depending on approval types.

<b>Field or Control</b>	<b>Description</b>
<b>Prior Approved Rows Exist</b>	The system displays this column if the dependent row that is currently displayed is not approved, but a previously effective-dated row for the dependent clause that was approved does exist.
<b>Future Pending Change Exist</b>	The system displays this column when pending rows for this dependent clause need to be approved before they can be used.

### Alternates - Attributes

Use the **Alternates** grid to define whether the system should potentially use an alternate clause instead of the primary clause. You can list multiple alternate clauses for use instead of the primary clause. Although they might exist, the system does not process any alternate clauses of an alternate clause. For general information about alternate clauses, see [Alternate Clauses](#).

<b>Field or Control</b>	<b>Description</b>
<b>Priority</b>	Enter a number that represents the importance of this alternate clause in the document. The lower the number, the higher the priority. The priority determines the order in which the system evaluates the alternate clauses, providing that the rule for the alternate clause is met. If a rule is true, the system places all objects that are attached to the rule of the alternate clause, and their children, into the document, and it considers no additional alternates. When rules are not met, the system uses the primary clause and all of its dependents.
<b>Alternate Clause</b>	Select the alternate clause. You cannot select the primary clause that you are working with as an alternate for itself, and you cannot select the same alternate clause twice.  If you are not using alternate rules, you can still list alternate clauses. You can select these clauses manually from within a generated Microsoft Word document.
	Click this button to access the Select a Clause page, where you can initiate a search for a specific clause. The page provides detailed search criteria such as clause effective dates, classes, groups in which a clause might be used, and dates on which the clause was checked out for editing.
<b>Description</b>	Click to access the Clause Definition page for the clause you select.

<b>Field or Control</b>	<b>Description</b>
<b>Content Format</b>	<p>Select how you want to represent the text in the document when you use this alternate clause:</p> <ul style="list-style-type: none"> <li>• <i>Full</i>: Select the full text for the alternate clause to become a part of the document when you use this clause to generate the document.</li> <li>• <i>Reference</i>: Use the reference text that is defined in the alternate clause.</li> </ul>
<b>Approval Status</b>	<p>Displays the approval status for this alternate clause. You can add alternate clauses that are in the <i>Initial</i> or <i>Pending</i> status. The system uses this field for informational purposes and does not require an <i>Approved</i> status for the system to list the alternate clause. If an alternate clause is not approved and is selected by a rule, the system does not include the unapproved alternate version of the clause in the document.</p>

## Alternates - Rules

Use this tab to associate alternate type rules to alternate clauses. The rule determines whether the alternate clause should replace the primary clause. Each alternate clause can have a rule attached. The system checks the alternates in their priority to find the first alternate for which the rule is true, and that alternate becomes the first clause instead of the primary clause in the document. If none of the rules are true, the system does not substitute the alternate clause.

Alternate rules can contain only level zero binds; however, you can use an alternate rule on clauses that repeat. When you save the clause definition and a bind that is used in the rule does not meet the document generation requirements, the system displays a message that errors were found with the binds. You cannot approve the clause until the errors are resolved. The error also appears in the message area of the clause. The following code is an example of an error message:

```
Rule JHAR5 cannot be attached as an alternate rule because it contains binds from a→
level > 0. (10420,306)
```

<b>Field or Control</b>	<b>Description</b>
<b>Rule</b>	<p>Select a rule for this alternate clause. Only alternate rules are available for selection, not standard rules. When you make the selection, the system displays a description of the rule. You can click the link to view the rule itself.</p>

## Library Definition Page

Use the Library Definition page (CS\_LIBRARY\_DEFN) to define clause libraries.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Define Libraries**

To establish a library, enter a library name and description. If you leave the fields blank, you can update them later.

After you establish a library, you can assign contract clauses to it using the **Library** field on the Clause Definition page. For general information about Clause Libraries, see [Clause Libraries, Groups, and Classes](#).

## Group Definition Page

Use the Group Definition page (CS\_CLS\_GROUP\_DEFN) to define clause groups.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Groups**

You can use groups to categorize clauses. When adding clauses to document configurators, you can use clause groups as search criteria. You can associate contract clauses with groups by clicking the **Associate to Clause Group** link on the Clause Definition page. For general information about groups, see [Clause Libraries, Groups, and Classes](#).

. The purpose of clause groups is to quickly add multiple clauses to the [Document Configurator Definition Page](#) and the [Section Definition Page](#). After clauses are added using a group, the clauses are maintained individually within the configurator or section.

---

**Note:** You cannot add a group as a dynamic object to a section or document configurator.

---

To add a clause group:

1. Enter the name of the group in the **Group Name** field and click **Add**.
2. Enter a description of the clause group and click **Save**.
3. To add clauses directly to the group, select an existing clause ID in the **Clause ID** field.

You can also add a clause to one or more groups while maintaining the clause by clicking the **Associate to Clause Group** link on the Clause Definition page.

Groups can contain multiple clauses, and a clause can be included in one or more groups.

## Clause Class Page

Use the Clause Class page (CS\_CLS\_CLASS) to set up classes for document clauses.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Classes**

Use this page to classify clauses and map the clause classes to approval types. This enables the user to use those classes that require workflow approvals for the clause definition itself or within documents. At least one class must be defined. One class can also be designated as the default for new clauses. When a

class is associated with a clause, the default approval type is supplied for that clause. This determines the behavior for the clause in terms of its approval process and when it can be used. For general information about Clause Classes, see [Clause Libraries, Groups, and Classes](#).

<b>Field or Control</b>	<b>Description</b>
<b>Class Name</b>	Displays the name of the class. If you are adding a class, the field is required.
<b>Default</b>	Select to make this clause class the default class value when a clause is defined. You can select only one class as a default.

## Approval Settings

Use this section if the class must be approved. If some classes do not need to be approved, then leave this section blank.

<b>Field or Control</b>	<b>Description</b>
<b>Approval Type</b>	Select an approval type for this clause class. This allows you to control the approval options that are available to the clauses that are associated with this class.  The system uses the approval roles and settings that are contained in the approval type definition to control workflow routings. You cannot select duplicate approval types.
<b>Default</b>	Select which, if any, approval type you want to be the default value when this clause class is used for collaboration. If you select a type, that type appears when you select this class for use with a document clause. You can change the approval type on the clause, but it cannot be cleared and always returns to the default approval type. This ensures that all clauses that are related to this class can be designated for workflow processing.

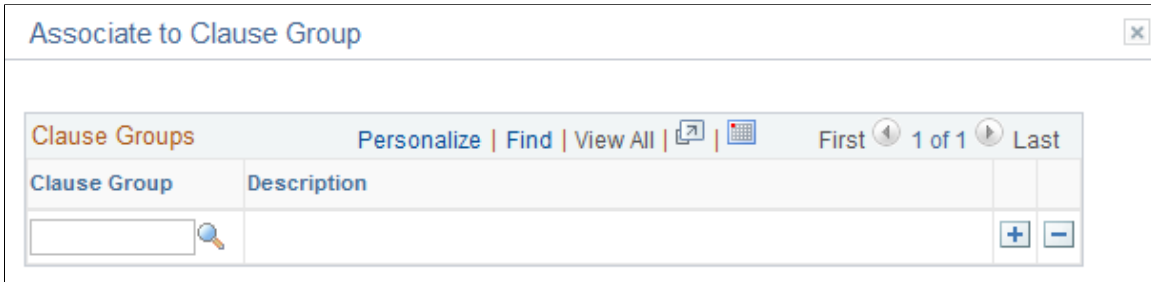
## Associate to Clause Group Page

Use the Associate to Clause Group page (CS\_ASSOC\_CLSGRP\_SP) to associate clauses with clause groups.

Navigation:

Click the **Associate to Clause Group** link on the Clause Definition page.

This example illustrates the fields and controls on the Associate to Clause Group page.



Use the **Clause Group** field to select a group with which you want to associate this clause. You can associate a clause with multiple groups. Clause groups are user-defined. You can use them to group types of clauses, or you can use them to group a sequential list of common clauses that can go together in documents, but are not mandatory dependencies. You can use these groups in document configurator maintenance to select all clauses by group and include them in the configurator.

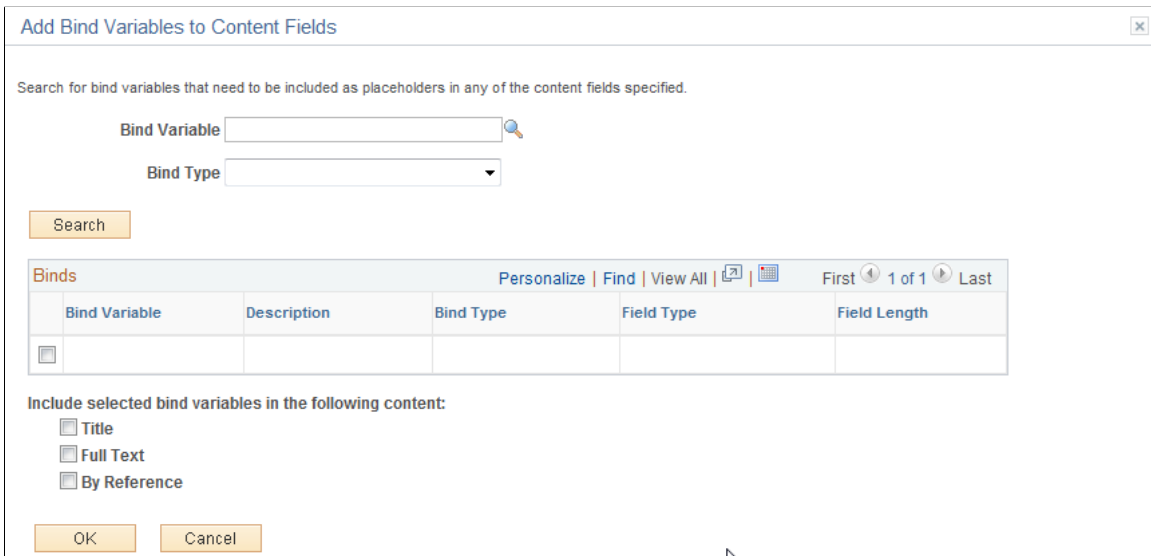
### Add Bind Variables to Content Fields Page

Use the Add Bind Variables to Content Fields page (CS\_OBJ\_ADDDBINDS\_SP) to add a bind variable to the content of a clause.

Navigation:

Click the **Add Variables** button on the Clause Definition page.

This example illustrates the fields and controls on the Add Bind Variables to Content Fields page.



Binds that are used in PeopleSoft Supplier Contract Management are variable definitions that enable you to map source transaction or contract wizard values into contract clauses.



<b>Field or Control</b>	<b>Description</b>
<b>Bind Variable</b>	<p>Select a bind variable. The system displays details about the predefined variable when you click the <b>Search</b> button.</p> <p>You can create binds using the <b>Bind Definition</b> field and then map them to transaction records.</p> <p>See <a href="#">Setting Up Binds</a>.</p>
<b>Bind Type</b>	<p>Select the type of bind to add to this clause. You can use this field to create a list from which you can select a variable. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Transactional</i>: Select to display a list of variables that originate from a source transaction.</li> </ul> <p>These are non-wizard binds such as those related to the PeopleSoft Purchasing transactional contract binds.</p> <ul style="list-style-type: none"> <li>• <i>Wizard</i>: Select to display a list of bind variables that are used with the contract wizard.</li> </ul>
<b>Field Type</b>	<p>Displays the type of field that you are adding to the clause. Field types define the structure of the data. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Date</i></li> <li>• <i>Date/Time</i></li> <li>• <i>Decimal</i></li> <li>• <i>Integer</i></li> <li>• <i>String</i></li> <li>• <i>Yes/No</i></li> </ul> <p>See <a href="#">Setting Up Binds</a>.</p>
<b>Field Length</b>	<p>Displays the field length of the bind that you are adding to the clause.</p>
<b>Title</b>	<p>Select to include this bind variable in the <b>Title</b> field of the clause.</p>
<b>Full Text</b>	<p>Select to include this bind variable in the <b>Full Text</b> field of the document clause.</p>
<b>By Reference</b>	<p>Select to include this bind variable in the <b>Reference Text</b> field of the document clause.</p>

## Adding a Bind Variable

You can add bind variables to the **Title** field, the **Full Text** field, or the **By Reference Text** field.

To add a bind variable:

1. Use the **Bind Variable** field to select the variable that you want to add to the clause content.
2. Alternatively, use the **Bind Type** field to select a type of bind from which you can add a variable to the clause content.
3. Click the **Search** button.

The system displays details about a single bind if you select a specific bind variable, or it displays a list of binds if you select to search by type. This functionality gives you an opportunity to use the bind or find another one.

4. From the list of binds, select those that you want to add to the clause.

The system places the variable at the end of the field that you specify; **Title**, **Full Text**, or **Reference Text**. You can move the variable to the location that you want within the document after the system inserts the variable.

5. Select the location where you want to add the bind variable in the clause.

You can add variables to a single clause element or to multiple elements, including the title, full text, and by-reference text.

PeopleSoft Supplier Contract Management supports a standard set of bind variables that represent PeopleSoft Purchasing transactional elements of the contract and include fields such as %%Supplier Name%%, %%Location%%, and %%Item Description%%.

## Clause Approval Status Page

Use the Clause Approval Status page (CS\_CLS\_APPROVAL) to preview clause approvals.

Navigation:

Click the **Preview Approval** button on the Clause Definition page.

This example illustrates the fields and controls on the Clause Approval Status page.

The screenshot shows the 'Clause Approval Status' page. At the top, it displays the title 'Clause Approval Status'. Below the title, there are three fields: 'SetID' with the value 'SHARE', 'Content ID' with the value 'PO\_AMEND\_AUTOBODY2', and 'Effective Date' with the value '01/01/2000'. Underneath these fields is the 'Description' which reads 'Amendment configurator body text for Purchasing Contracts'. At the bottom of the page, there is a button labeled 'Review/Edit Approvers' and a link labeled 'Return to Clause Definition'.

This feature is available only when the **Clause Approval** check box is selected on the [Installation Options - Supplier Contract Management Page](#).

Use this page to review approvers and reviewers, add ad hoc approvers or reviewers, and submit a clause for approval. When approvals are required and you submit the clause for approval, the system routes the approval notifications and sets the contract approval status to *Pending*.

If you submit a clause that does not require approvals, the system displays the Clause Approval Status page, which indicates that approvals are not needed and the clause is approved automatically.

If approvals are needed and the approval criteria has been met, the system sets the clause approval status to *Pending*, sends an e-mail, and creates a worklist item for approvers in the first relevant steps based on approval configuration. This page displays the updated approval status.

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**Note:** If bind variables have not been resolved, the system does not send the clause for approval and displays the errors that exist in the variable definitions.

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<i>Field or Control</i>	<i>Description</i>
<b>Return to Clause Definition</b>	Click to return to the Clause Definition page.

---

## Understanding Document Sections

Document sections are used to create a reusable structure of clauses, rules, and sections that can be nested with up to nine indented outline levels, and to create rules that are used within a document.

### Effective Dating

Sections are effective-dated so that you can make changes to sections without affecting section structures that are used in existing documents. You should decide which starting effective date to use when creating the contract sections. The system uses the start date of the contract to determine which sections are valid and includes the content of the section in the document.

### Section Approval Status

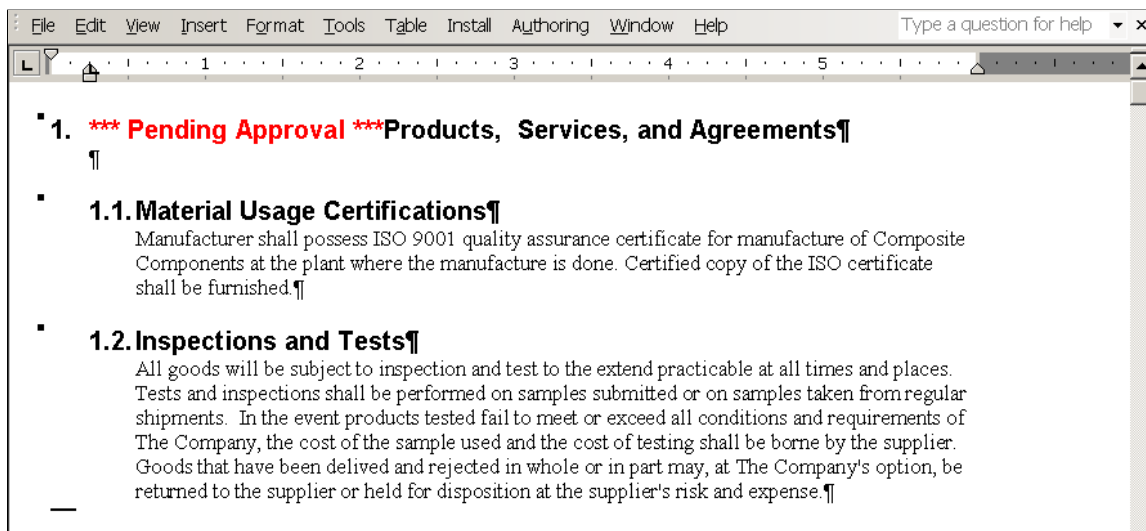
Unlike clauses, sections do not use the PeopleSoft Approval Framework for approvals. The [Section Definition Page](#) is used to approve sections and the "User Preferences - Supplier Contract Management Page" (Application Fundamentals) is used to define who can approve sections. You can determine user preferences for clause librarians so that the sections they create automatically have an approved status.

### Editing Section Text

Sections can contain a title and section body that you can use as an introduction to the document section. The editing functions for a section are similar to those for clauses because you can edit text directly using the PeopleSoft page, or use Microsoft Word to modify the section and add text using a rich text format (RTF).

This format is a file type that the system uses to transfer formatted text documents between applications. The format is often used when a document is created in one program and is edited in another program. With the document authoring system, you use the format between Microsoft Word and the PeopleSoft system.

The following example illustrates how a section can appear when you preview it in Microsoft Word.



When you preview a section, if the section status is *Pending Approval*, then the Microsoft Word document indicates the status in the section title.

However, when you generate a document, if a section status is *Pending Approval*, then the unapproved section is omitted. The system generates a message within the section to indicate that it has not been approved.

After accessing Microsoft Word, you can create or modify the section content for the title, full text, and reference text by modifying it within the brackets.

---

**Note:** The system enables Microsoft Word document protection for the section to protect hidden tags that are used by the PeopleSoft application to recognize the title and text fields during check-in. Protection can prevent you from performing certain format changes using Microsoft Word. In these cases, you can disable the protection, make the change, then enable the protection again. To do this, see [Protected Areas](#).

---

Sections do not use alternates or groups. The section structure can include clauses, other sections, and rules.

When previewing or generating a document, the system uses the Microsoft Word template and setup values to determine which paragraph style and outline number format to associate with the section. The system preserves special character formats such as making text bold or underlining a word. The system applies these paragraph styles for section content that does not have explicit override paragraph styles or lists defined within the section. Setting up Microsoft Word templates properly requires a working knowledge of Microsoft Word and paragraph styles. For more information about special considerations for editing clause content and overriding styles see [Understanding Microsoft Word Integration with Supplier Contract Management](#).

## Section Bind Variables and Repeating Sections

Sections are similar to clauses because they can use binds and repeating sections. Sections can contain binds within the section title or section body.

**Note:** If a section has a repeating bind, you cannot attach a table clause with the repeating bind at the same level. However, you can attach a table with a repeating bind at a lower level within the same hierarchy.

See [Bind Variables and Repeating Clauses](#).

## Setting Up Sections

### Pages Used to Set Up Sections

Page Name	Definition Name	Usage
<a href="#">Section Definition Page</a>	CS_SECTION_DEFN	Define document sections.
<a href="#">Copy Information From Page</a>	CS_OBJS_COPY_SP	Create a document section by copying it from an existing section.

### Section Definition Page

Use the Section Definition page (CS\_SECTION\_DEFN) to define document sections.

Navigation:

**Supplier Contracts > Manage Contract Library > Section Definition**

This example illustrates the fields and controls on the Section Definition page.

Use this page to define and maintain a section. Sections provide a method for creating a collection of clauses, other sections, and rules that have a common function or purchasing attributes within the

contract. For example, information that is needed to define the warranty for a custom product might consist of several clauses, because all of the clauses together make up the warranty for the contract. You can include all warranty clauses in a single section. Sections are reusable and can be nested in document structures. You can include sections explicitly or use inclusion rules on a document configurator. Sections are controlled by SetID.

The Section Definition page is divided into two types of information, section attributes and section structure. The attributes provide basic information about how the section is used and the structure provides the section's component details and statuses. The elements or children of a section can consist of clauses, sections, rules, and tables.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Description</b>	Enter a description for the section. This is a required field.
<b>Copy From</b>	Click to access the Copy Information From page. The button is only available when you are adding a section, and enables you to copy an existing section to create a new section. When you click this button, the system provides a list of existing sections.

<b>Field or Control</b>	<b>Description</b>
<b>Section Type</b>	<p>Select the section type that you want to use to organize and control document behavior. Available types are:</p> <ul style="list-style-type: none"> <li> <p><i>Amendment Placeholder:</i> Select to identify this section as an amendment section placeholder.</p> <p>The system uses a placeholder section as a location in the amendment configurator to record text additions, updates, and deletions that have been made in the main amended document. During system processing, these changes can be extracted and placed in a separate amendment file, which is saved in the same location where the Amendment Placeholder section is defined in the amendment configurator. An amendment configurator should contain only one Amendment Placeholder section. See <a href="#">Creating Document Amendments</a>.</p> </li> <li> <p><i>General:</i> Select to use this as an overall section throughout a document.</p> <p>You can use general sections independently or with other sections, such as subsections. <i>General</i> is the default value for the field.</p> </li> <li> <p><i>Introduction/Title:</i> Select to use this as an introduction section. .</p> <p>Use introduction/title sections to identify document introduction sections.</p> <p>These section are useful when you create documents with a table of contents. If you specify a table of contents on the document configurator, the system places the table of contents from Microsoft Word after the introduction/title section. This functionality enables you to create introduction pages of the contract prior to the table of contents and numbering of terms and conditions. The system requires that introduction/title sections be listed before any general sections in a document configurator.</p> </li> </ul> <hr/> <p><b>Note:</b> When you use contract agreements and use the system-provided bind variables (%%HDR_AGREE%% and %LINE_AGREE%%) in a section, the system automatically creates a special placeholder section. This placeholder section is either SLA-HDR-PLACEHOLDER or SLA-LINE-PLACEHOLDER, and it is used when the bind value is referenced in section content. The system prompts you to include this section in the section structure to gather and place contract-specific agreement clauses in the document configurator using special logic. The system maintains these placeholder sections and you cannot modify them.</p>
<b>Notes</b>	<p>Enter comments that provide additional information about the section and why it should be used. Notes are informational only and appear only on this page.</p>

## Section Attributes Per Effective Date

<b>Field or Control</b>	<b>Description</b>
<b>Effective Date</b>	<p>Select an effective date. Sections are effective-dated to enable you to retain a history of section text and approvals, and to make changes to sections without affecting terminology in existing documents. When a document is generated, the system uses the start date of the contract to determine which sections to include in a document. When you change a section, you should add a new effective-dated row that represents the date that you want to start using the section in new contracts. When you add new effective-dated rows for the section, it assigns an approval status of <i>Initial</i> to the new row.</p>
<b>Status</b>	<p>Select a status to assign to the section. This is a required field for all effective-dated records in PeopleSoft Supplier Contract Management. Options include:</p> <ul style="list-style-type: none"> <li>• <i>Active</i>: Indicates that the section is approved and can be used in documents.</li> <li>• <i>Inactive</i>: Indicates that a section is deactivated, phased out, or is to be put on hold.</li> </ul> <p>This setting prevents the section from being included in new documents.</p>
<b>Edited via Word Application</b> (edited using Microsoft Word application)	<p>Displays as selected if the section has been checked out and edited in Microsoft Word. If the check box is selected and disabled, the document has been edited.</p> <p>This setting indicates that you may have rich text associated with the section and, if you make text edits using this page, then the text will be lost. If you attempt to edit the document, the system displays a warning.</p>
<b>Where Used</b>	<p>Click to identify where this section is used in document configurators.</p> <p>For additional information about Where Used searches, see <a href="#">Performing Where-Used Searches</a>.</p>



<b>Field or Control</b>	<b>Description</b>
<b>Numbered Section</b>	<p>Select to indicate that the section title is to be numbered in the Microsoft Word document. The title is numbered according to the default numbering style when you preview or generate a document. This check box is selected as the default value.</p> <hr/> <p><b>Note:</b> The system determines the numbering of clauses in a section preview using the paragraph style and outline numbering format that is defined in the default Microsoft Word template for the SetID. The system determines how numbers are formatted within an authored document using the Microsoft Word template that is associated with the document configurator.</p>
<b>Insert Page Break Prior</b>	<p>Select to insert a page break prior to this section in the document. You can use page breaks to ensure that a section receives higher visibility in the document.</p>
<b>Repeating Object</b>	<p>Displays as selected when the section is repeating in nature. The system determines whether this check box is selected based on the bind variables that are included in the section. If the system detects a bind variable that repeats, such as <code>%Item ID%</code> (level one) in the section title or text, then it displays this check box as selected. This check box is typically deselected for most sections. However, because special rules and edits can be applied as repeating objects, knowing when an object is repeating is helpful.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Approval Status</b>	<p>Select an approval status. Unlike clauses and documents, sections do not use the PeopleSoft Approval Framework . You can change the approval status as long as you have authority to do so. The system validates your selection before it changes this field to <i>Approved</i>. Manual approvals can be defined for librarians using the "User Preferences - Supplier Contract Management Page" (Application Fundamentals).</p> <p>Valid statuses are:</p> <ul style="list-style-type: none"> <li>• <i>Approved</i>: Select to indicate that the section can be used when documents are generated.</li> </ul> <p>If you make changes to a section and click <b>Save</b>, the system automatically sets the status back to <i>Initial</i> and you have to manually select <i>Approved</i>.</p> <ul style="list-style-type: none"> <li>• <i>Initial</i>: Select to indicate that the section is not ready to be used.</li> </ul> <p>This is the default setting when you create or make changes to a section.</p>
<b>Validate Variables</b>	<p>Click to verify that bind variables in the section exist and, if repeating binds also exist, that they are being used correctly. This process is similar to saving the section except that validating bind variables enables you to verify the binds of the section without saving it.</p> <p>If errors occur with this process, the system populates the <b>Errors</b> grid with the issues.</p>
<b>Add Variables</b>	<p>Select to access the <a href="#">Add Bind Variables to Content Fields Page</a>, where you can add bind variables to this section.</p>
<b>Preview Document</b>	<p>Click to open the section in a read-only mode using Microsoft Word. When creating the document, the system applies paragraph style formats from the Microsoft Word template that is defined for the SetID.</p> <hr/> <p><b>Note:</b> Numbered section previews always start with the first number in the Microsoft Word numbering scheme; however, when the system generates the final document, the numbers can change based on positions in the document.</p> <hr/>

<b>Field or Control</b>	<b>Description</b>
<b>Edit Document</b>	<p>Click to edit section content using Microsoft Word. Before editing documents, you should understand the functionality of Microsoft Word and integration with PeopleSoft Supplier Contract Management to help you create the contract library.</p> <p>See <a href="#">Editing Clause Text</a>.</p> <p>When you click this button, the system displays the <b>Checked Out By</b> and <b>Checked Out On</b> fields, and it creates a Microsoft Word document that includes the title, full text, and reference text fields. You must save this file to a local location before you check the document back into the PeopleSoft system. The system creates a default file name with the SetID, section ID, and effective date of the section that you are editing as part of the file name.</p> <p>While you can apply custom formats using Microsoft Word, you should use the Microsoft Word template and paragraph styles to process formats when previewing and generating the document. Doing so provides a consistent format of numbering and content for finished documents. This formats numbers and content consistently for finished documents.</p> <p>See <a href="#">Understanding Document Sections</a>.</p>
<b>Checked Out By</b>	<p>Displays the user ID of the person who has checked out the section and is editing it.</p>
<b>Checked Out On</b>	<p>Displays the date that the section was checked out to be edited.</p>
<b>Cancel Checkout</b>	<p>Use this button to cancel the checkout of a section without checking in any changes.</p> <hr/> <p><b>Note:</b> If you saved a local version of the section, it remains on the local client system.</p> <hr/>
<b>Check In</b>	<p>Click to check in the Microsoft Word version of the section. This process uploads the Microsoft Word version of the section so that the PeopleSoft system is aware of the rich formatting that you added to the section. To check in the section, load the file from the location that you selected when you clicked the <b>Edit Document</b> button.</p> <hr/> <p><b>Note:</b> The system validates the file that you select to ensure that it is an XML file and that it has embedded keys that identify it as the section that was originally checked out.</p> <hr/>

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Title</b>	Enter descriptive text that identifies the content of the section.
<b>Full Text</b>	Enter the text to use for a section. You can specify the full text to be used in a configurator. The text becomes a part of the document when you use this section to generate the document.

## Section Structure

Use this grid to define the content of a section and how that content flows to produce the contract.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Sequence</b>	<p>Enter a value that represents the order in which the system should structure content in the section. The lowest value is the first section to be used after the primary section when the system generates the document.</p> <p>When the system processes the Microsoft Word document, it sequences the elements based on the value that you enter in this field. You do not have to enter sequential numbers because the system orders the elements when you click the Sequence column heading.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Numbered</b>	<p>Select to make the content within the section numbered. This check box is available when you select the <b>Numbered Clause</b> check box for the primary section. If the check box is disabled, the primary section is not a numbered section and, therefore, the dependent clause cannot be numbered.</p> <p>If you select the <b>Numbered Section</b> check box, then you can decide whether you want to continue that numbering scheme for content within the section. This enables you to determine the content that is numbered. The default value is selected, which means that the system continues to number the content in the section structure when the system generates a document.</p> <p>The number scheme can be different in these two scenarios:</p> <ul style="list-style-type: none"> <li>• When previewing a document, the system determines whether sections are numbered based on the paragraph style and outline numbering scheme that is defined in the default Microsoft Word template that is associated with the SetID.</li> <li>• When generating a document, the system determines how the content is numbered based on the paragraph style and outline numbering scheme for the Microsoft Word template that is associated with the document configurator.</li> </ul>
<b>Content Type</b>	<p>Select the type for the section element content. Sections can have multiple elements to form a complete document.:</p> <ul style="list-style-type: none"> <li>• <i>Clause</i>: Select to use a required clause as part of this section. Clauses are the basic building blocks of a document. You can use multiple clauses.</li> <li>• <i>Rule</i>: Select to use a rule in this section. A rule is a set of conditions that produces specific results to include additional clauses or sections within this section and the generated document.</li> <li>• <i>Section</i>: Select to use another section as a subsection of this section.</li> </ul> <p>After selecting the content type, use the <b>Content ID</b> field to select a specific element.</p>
<b>Description</b>	<p>Click to access the page that describes this element of the section.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Content Format</b>	<p>Select the text type to include when used in a document. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Full Text</i>: The system uses the Full Text field when generating a document.</li> <li>• <i>Reference</i>: The system uses the Reference Text field when generating a document. This option is only available when the <b>Content Type</b> field value is <i>Clause</i>.</li> </ul>

## Statuses

Use this tab to view the effective-date status and approval status for each element based on the effective date of the section. This tab provides the availability and current state of each element in the section. For example, if someone is updating an element, you can use this tab to ensure that the entire section can be used.

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**Note:** Although the system bases the section status that appears here on the effective date of the section, within the document configurator you can display the status based on the **View As Of Date** field in the configurator. Furthermore, during document generation, the system includes the version of the content based on the begin date of the transactional purchasing or ad hoc contract.

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<b>Field or Control</b>	<b>Description</b>
<b>Effective Status</b>	Displays <i>Active</i> or <i>Inactive</i> . If an element is inactive, you cannot use it to form the structure of a document.
<b>Approved Status</b>	Displays <i>Initial</i> , <i>Approved</i> , or <i>Pending</i> . Unless an element is approved, the system does not include it in the generated document.

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## Importing Clauses and Sections

To import clause and section objects, use the Clause Import (CS\_CLAUSE\_IMPORT) component.

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**Note:** If your organization uses Microsoft Word 2003, please reference previous versions of PeopleSoft Supplier Contract Management documentation for setup and usage steps.

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## Page Used to Import Objects

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Import Clauses/Sections Page</a>	CS_CLAUSE_IMP_SUMM	Define default values for clause and section attributes, select and import object files, review object contents parsed from the uploaded file, and select to create objects in the contract library. See also <a href="#">Resolving Import Errors and Warning Messages</a> and <a href="#">Creating and Reviewing a Document Configurator After Importing Objects</a> .

## Understanding the Object Import and Creation Process

PeopleSoft Supplier Contract Management enables you to import legacy clauses, child clauses, and sections that are not currently in the Supplier Contract Management system. Legacy objects are preexisting objects, such as clauses, that were not created using the PeopleSoft system and that do not have content controls. To import clauses into the system, the clauses must exist or be saved in a Microsoft Word XML Document format.

You can import a single object or use the same object import session to import multiple objects. An import session is typically a one-time setup and compilation of Microsoft Word-based legacy objects that you want to create in the contract library. As part of the import process, you can also control the structure of content as it is imported. For example, you can load a series of clauses independently or select multiple clauses to be sections, child clauses within sections, or dependent clauses within clauses. After you create the clauses, sections, and child clauses and while you are still in the same session of the import component, you can create a new configurator from the content that you just imported. This can be useful if you have existing Microsoft Word templates that you want to break into clauses and create a configurator as part of the import process.

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**Note:** You cannot create table clauses when you import clauses. A table of contents, headers and footers, section breaks, and attachments are not supported.

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**Note:** The configurator creation feature is intended to be used only by clause librarians.

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Object import sessions are made up of these stages:

1. Create an object XML file.

Each object (clause) within Microsoft Word must have specific content controls to meet the structural requirements for system objects. To create these XML files, in the Microsoft Word document you must use Content Controls and save the file as a Microsoft Word XML document. The content controls are used to identify the clauses or sections, as well as its attributes, when it is imported.

To complete this stage, edit legacy files on a local drive and prepare them to be imported to the [Import Clauses/Sections Page](#).

2. Define object default attributes.

Before and during the process of importing legacy files, you define basic information that you can use as default values for one or multiple objects that are to be uploaded. Use the Defaults for Object Attributes section on the [Import Clauses/Sections Page](#) to complete this stage.

3. Select the object file.

Click the **Select XML File** button to browse for the file on a local system. Select the XML file that contains the legacy clauses, child clauses, or sections to be imported.

The file must be an XML file and created using Microsoft Word. If the file consists of multiple objects (each object can have a specific ID, title, full text, and by reference attributes), then content controls need to be added to each object and its attributes. To identify clauses and their attributes in a Microsoft Word document, you need to add content controls. To be imported into PeopleSoft, each clause, section, or child clause should have a content control, and then all its attributes (id, title, full text, and by reference) need content controls. Otherwise, all text within a content control that has **new\_clause** in its tag property is imported as full text.

4. Upload the object file.

Click the **Upload** button. The system populates the **Objects to be Created** grid with objects contained in the selected file. The system assigns the same default value attributes to each object uploaded from the file. The title, full text, or by reference attributes are interpreted based on whether each is entered inside a content control in the file.

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**Note:** The system automatically collapses the Defaults for Object Attributes section after uploading a file.

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5. Edit individual object values.

Use the tabs within the Objects to be Create section to review and edit individual objects before you click the **Create Selected Objects** button.

Depending on whether you have already uploaded a file during this import session, the system appends new objects to Objects to be Created section or removes objects that were previously uploaded before uploading the new ones. When prompted, click **Yes** to append the new objects to the grid or click **No** to remove all uploaded objects from the grid.

6. Create the object in the contract library.

Click the **Create Selected Objects** button to add objects to the contract library. During this stage, you define object import types and you review and fix errors for each object that you select to create.

7. Create or append a configurator in the contract library.

After you create clauses and before exiting the component, you can create a new configurator ID or append the objects to an existing configurator:

- To create a configurator, enter a new configurator ID and click the **Create Configurator** button.

This creates a new configurator and adds the content that is listed on the Import Object directly to the new configurator. For basic document configurators, this feature enables you to create a first draft of the equivalent configurator, which can later be modified. After you click the **Create** button, you can then click the configurator description to review and edit the Document Configurator Definition component for the new configurator that you just created.



- To append objects to an existing configurator, select an existing configurator ID.

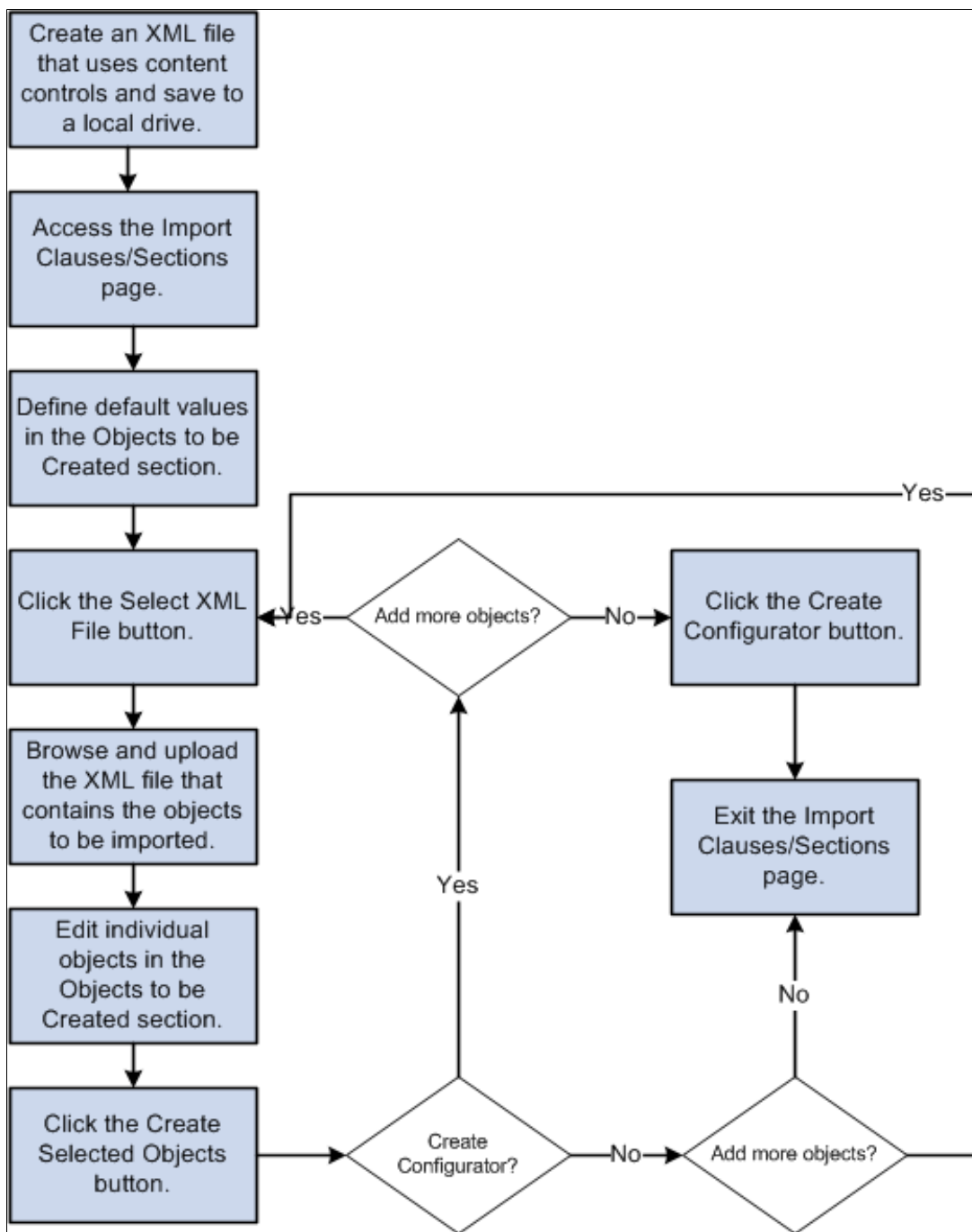
You receive a message asking if you want to append the objects to the configurator. Click the **Yes** button and the system changes the **Create** button to **Append**. Click the **Append** button.

See [Understanding Document Clauses](#) and the [Import Clauses/Sections Page](#).

## **Object Import Process**

This diagram illustrates the flow of the Object Import process.

This diagram illustrates the potential steps for importing objects. It includes creating a configurator during the process as well as adding more objects from additional files.



### Import File

At a minimum, each clause, child clause, or section must be embedded in a content control and must specify a *new\_clause* in the tag property. The Microsoft Word file must be saved as a Microsoft Word .XML Document format. The purpose of the *new\_clause* content control is to identify the beginning and ending of each new object to be imported. If a file does not contain content controls, the system parses all the text as a single clause, child clause, or section, depending on the import type that you use to place the object in the contract library. If a file contains multiple objects and you add a content control to

each new object but the text between objects does not have content controls, then the system ignores that text during the upload.

This example illustrates how a Microsoft Word file can be structured before importing it into Supplier Contract Management. This example includes the content controls that you add to clause and section objects.

This example illustrates the fields and controls on the Example of import file as they appear in a Microsoft Word document.

«new\_clause» id DESCOFPROD id title Description of Product(s) title  
 Supplier hereby agrees to provide all products defined in Exhibit A and to comply with all specifications, which may be included in the Products description at Exhibit A. The company shall use reasonable efforts to direct applicable requests of such Products to Supplier under this Agreement. Unless otherwise expressly stated herein, this Agreement does not confer on Supplier the right to be the exclusive provider of Products to the company »new\_clause«

«new\_clause» id PERFSTD id title Performance Standard title  
 Supplier agrees to perform and provide any necessary support for the Products and/or Services described in this Agreement to the satisfaction of the **University** and with the standard of care and skill of an expert regularly rendering services of the type required by this Agreement and in conformance with state and federal law. »new\_clause«

«new\_clause» id TERMBREACH id title Termination for Breach title  
 Either party may terminate this Agreement upon breach by the other party of any material provision of this Agreement, provided the breach continues for thirty (30) calendar days ("Cure Period") after receipt by the breaching party of written notice of the breach from the non-breaching party. Cure of the breach within the Cure Period shall continue the Agreement in full force and effect, provided however three (3) breaches of a material provision are an independent material breach not subject to cure. »new\_clause«

Using the XML file, you map data rows from the import source into the clause, child clause, or section definition structure of the application. A content control should be added to each clause, section, and child clause and each can have up to four embedded content controls, which are:

- **ID:** You can enter an ID for the object that the system uses to name the object when it is created in the document authoring system.
- **Title:** The system uses the value you define for this embedded content control as the object title. You can also use the first string of text in the title to create an ID for a clause or section object using the Import Clauses/Sections page.
- **Full Text:** This embedded content control provides the **Full Text** field for the new object.
- **By Reference:** All text within this embedded content control is parsed into the **By Reference** field of a new clause object.

After you add content controls to all objects within the document that you want to import, you must save the Microsoft Word document as a Word XML Document format. Then, you select the file on the Import Clauses/Sections page to upload it. You can complete the import process using this page by selecting the objects to create, defining the import type, and clicking the **Create Selected Objects** button. If you exit the page and objects from the same selected file remain before you click the **Create Selected Objects**

button, then the system discards the objects and you must enter the default information and select the XML file again.

For more information about adding content controls, recording macros, and adding buttons to the quick access toolbar, see [Editing and Maintaining Documents Using Content Controls](#) and [Adding a Custom Button](#).

## Formatting Imported Clauses

To reduce the amount of rework needed to achieve the desired format of clauses after they are in the library, consider these points. These points are not requirements but should be considered to help you during the object implementation process:

- Titles

Use separate titles with each clause or section that you define, especially when using the system to automatically number the content. When using a separate title, each title is numbered, and the content below it is not numbered. This enables you to create a table of contents based on the paragraph style of the title in Microsoft Word.

- Numbering

If an existing template and content contains basic numbering, such as when each outer clause is numbered, then remove the numbering in Microsoft Word prior to the import process. This is especially helpful when the template contains numbered text.

- Paragraph Styles

If an existing template and document content contains clauses that do not have a lot of indented bullets and numbers, then you should remove all paragraph style formats and keep the style as normal. This enables you to maintain paragraph styles that you want using the system and have Microsoft Word paragraph styles applied to the document each time you generate it. See [Setting Up Document Templates and Styles](#).

This approach may not be possible if you have clauses that are more complex. With complex clauses, it is possible to specify styles within each Microsoft Word clause. The system can incorporate these styles as it generates documents and ignores the paragraph style specified in the system's Microsoft Word templates.

When you are not sure about paragraph styles and number formats, use the Reveal Formatting feature in Microsoft Word and click on the content within an unprotected preview document in the document configurator to see which paragraph styles and number formats the system will apply when you create the document. When using information from the preview document, you can edit system templates or individual clauses and sections to achieve the format that you want.

---

**Note:** When using the object import process, you can only create general clauses. You cannot create table clauses, which are designed to be used with Microsoft Word tables and summarizations for transactional field values.

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## Import Clauses/Sections Page

Use the Import Clauses/Sections page (CS\_CLAUSE\_IMP\_SUMM) to define default values for clause and section attributes, select and import object files, review object contents parsed from the uploaded file, and select to create objects in the contract library.

Navigation:

**Supplier Contracts > Manage Contract Library > Import Clauses/Sections**

This example illustrates the fields and controls on the Import Clauses/Sections page (1 of 2).

### Import Clauses/Sections

The first section on "Defaults for Object Attributes" contains default values to each object (i.e. clause or section to be imported). You may change individual field after the objects are read from the selected XML file. The input file must be an XML file created using Microsoft Word and it contains new objects to be imported. Content controls must be applied to all the objects in the file that needs to be imported.

**Defaults for Object Attributes** ?

'SetID  Effective Date   Status Active

**Object ID Numbering Options**

**Enter Manually**  
(No default; enter manually or get ID indicated in XML file)

**Extract from Object Title**  
(Get first word from Object Title enclosed in XML element)

**Use Auto Numbering**  
(Use predefined numbering that consists of a start sequence and sequential numbers)

Clause Start Sequence

Section Start Sequence

Library

Class Name

Approval Type

Approval Status

Notes

Default Description from Title

Numbered Object

Protect in Document

Error on Duplicate Title

Error on Duplicate Description

This example illustrates the fields and controls on the Import Clauses/Sections page (2 of 2).

Select Word XML file that contains the objects to be imported. Once the file is selected, each object with the correct XML element will be read and displayed below. Select XML File

Show Detail View

**Objects to be Created** Personalize | Find | | | First 1 of 1 Last

Content | By Reference Text | Attributes | Categorization | Error/Warning Messages

Sel	Create Status	Import Type	Object ID	View Object	Title	Full Text
<input checked="" type="checkbox"/>		Clause				

Select All Clear All Create Selected Objects Clear Objects

**Result of Last Create**

Clauses Created	0	Sections Created	0
Clauses with Errors	0	Sections with Errors	0
Clauses with Warnings	0	Sections with Warnings	0
Number of clauses processed	0	Number of sections processed	0

Last Selected XML File

**Create Document Configurator**

Configurator ID

Source Transaction

Description:  Create

You can specify a new or existing Configurator ID. If you specify an existing Configurator ID, objects that are successfully created will be appended to the specified Configurator ID.

After creating object–clauses and -sections, you can review and fix warnings and errors. The system creates error messages on the Error/Warning Message tab for each selected object that it fails to create. You can fix the objects that have errors and then attempt to create the objects again.

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**Note:** The **Show Detail View**, **Show Summary View**, **Create Selected Objects**, and **Clear Objects** buttons are not available until after you have uploaded an object.

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See [Understanding the Object Import and Creation Process](#).

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**Note:** When using this page, the term *object* refers to objects that are being imported from an XML file. Objects include clauses and sections.

---

### Defaults for Object Attributes

Use this group box for objects uploaded from selected files that apply to all objects uploaded from the selected XML file. Selecting attributes saves time when importing multiple objects. While in the same session, you can change the default values by clearing all objects previously uploaded and clicking the **Clear Objects** button.

<b>Field or Control</b>	<b>Description</b>
<b>SetID</b>	Select a SetID to apply to the objects that you will create. This field is required, and the system uses the same SetID for objects uploaded from the same file.
<b>Effective Date</b>	<p>Select an effective date. The default value for the field is blank. You can also enter a date after you import the objects using the <b>Show Detail View</b> or <b>Show Summary View</b> buttons. Effective dates can be overridden for individual objects. Normally, when you initially import objects to create the contract library for existing approved objects, you want to enter an effective date in the past. This action makes the object active and available for any document that you need to generate based on the document start date.</p> <p>In addition, after you load an object with a specific effective date, you can reload the object to create a new instance of the object title and body text for the same object ID. This new instance enables you to update new versions of an existing object (clause or section).</p>
<b>Status</b>	Displays the status of the object (clause or section). The default value for the field is <i>Active</i> . You cannot change the value because the system imports and creates clauses and sections with an <i>Active</i> status.
<b>Enter Manually</b>	Select to manually enter the ID for the object or use the value in the <b>id</b> content control from the Microsoft Word XML Document. You use the <b>Object ID Numbering Options</b> group box to select how you want to create names for the objects.
<b>Extract from Object Title</b>	Select to extract the object ID from the first string of text within the <i>title</i> content control. The system uses the first string of text in the file. For example, if a clause or section is preceded by a paragraph number with a space between the number and text, then the system uses the number as the ID for the object. If the first string is a word, then the system uses that word as the object ID. If the name contains spaces, then you can add a content control and enter <i>id</i> in the tag property. Otherwise, only the characters preceding the space are extracted as the object ID.

<b>Field or Control</b>	<b>Description</b>
<b>Use Auto Numbering</b>	<p>Select to use automatic numbering. The system displays the default starting sequence for clauses and sections, but you can select other values. When using automatic numbering, the system uses <i>NEXT</i> as the clause or section ID when each object is parsed from the uploaded file and added to the Objects to be Created section. When you create the object, the system assigns the next number in the specified starting sequence to the object–clause and -section.</p> <ul style="list-style-type: none"> <li>• <b>Clause Start Sequence:</b> Select the automatic numbering start sequence for a clause. This field becomes available when you use automatic numbering as the numbering option for clauses. The default value is the sequence that was defined as the default value for clause automatic numbering. When you select to create the selected objects in the contract library, the system uses this sequence and the next available sequence number to assign an ID to the clause.</li> <li>• <b>Section Start Sequence:</b> Select the automatic numbering start sequence for a section. This field becomes available when you use auto numbering as the numbering option for sections. The default value is the sequence that was defined as the default value for section automatic numbering. When you select to create the selected objects in the contract library, the system uses this sequence and the next available sequence number to assign an ID to the section.</li> </ul> <p>For additional information, see <a href="#">Setting Up Automatic Numbering</a>.</p>
<b>Library</b>	<p>Select the library to which you want to assign to the clauses or child clauses that you import and create. You can use the Categorization tab to override this value for individual clauses and child clauses. If the object is a section, the system ignores the value that you enter in this field because only clauses and child clauses are assigned to a library. See <a href="#">Library Definition Page</a>.</p>
<b>Class Name</b>	<p>Select a class to assign to the clauses or child clauses that you import and create. If a default approval type exists for a specific class, the system displays it in the <b>Approval Type</b> field. You can use the Categorization tab to override this value for clauses and child clauses. This field only applies to clauses and child clauses, and is ignored for sections.</p>





<b>Field or Control</b>	<b>Description</b>
<b>Approval Type</b>	<p>Select an approval type to assign to clauses and child clauses. If the class has a default approval type, you cannot change this field. This field only applies to clauses and child clauses, and is ignored for sections. See <a href="#">Setting Up Approval Types</a>.</p>
<b>Approval Status</b>	<p>Select the status to apply to all objects when they are created.</p> <ul style="list-style-type: none"> <li>• If clause approval is required on the Installation Options page, the default value for this field is <i>Initial</i>, and you cannot change it.</li> <li>• If clause approvals are not required, you can select <i>Initial</i> or <i>Approved</i>.</li> </ul> <p>An approved statuses make objects available when they are imported and created.</p> <p>If you select <i>Approved</i> and the object contains bind variables that are not valid, the system creates the object but changes the status to <i>Initial</i>.</p> <p>See <a href="#">Clause Definition Page</a> and <a href="#">Section Definition Page</a>.</p>
<b>Notes</b>	<p>Enter additional information about the objects. You can override this value on the Attributes tab.</p>
<b>Default Description to Title</b>	<p>Select to indicate that you want the system to use the first 60 characters of the title element in the Microsoft Word XML Document as the <b>Description</b>. If a title does not exist for an object, the system leaves the <b>Description</b> field blank. You must enter a description before you create the object.</p>
<b>Error on Duplicate Title</b>	<p>Select to indicate that the system should check whether the title already exists for a object–clause or -section. If a duplicate title exists, the system does not add the object and creates an error message, which appears on the Error/Warning Messages tab.</p>
<b>Numbered Object</b>	<p>Select to indicate that all objects created during this import session should be numbered. After you import the objects, you can manually update the value for each object before creating them in the contract library. Numbered objects apply to all clauses and sections.</p>


<b>Field or Control</b>	<b>Description</b>
<b>Error on Duplicate Description</b>	Select to indicate that the system should check whether the description already exists for a object–clause or -section. If a duplicate description exists, the system does not add the object and creates an error message, which appears on the Error/Warning Messages tab.
<b>Protect in Document</b>	Select to indicate that the imported objects should be protected when they are included in an authored document. After you import the objects, you can manually update the value for each object before creating them in the contract library.

### Objects to be Created - Content

Use this section to review and change information about objects before they are created. You can override most of the attributes for individual objects after you have uploaded them from the .xml file and before you create them in the contract library. For example, you can change the effective date for individual objects, whether an object is numbered, or the library to which a clause object is assigned before you create the object. This grid is not populated until you select to upload an XML file.


<b>Field or Control</b>	<b>Description</b>
<b>Select XML File</b>	<p>Click this button to access the Select XML File to Import Clauses page. Use this page to select a Microsoft Word XML file that contains the objects you want to import. Files that are eligible to be imported and created in your library must be an XML type file.</p> <p>If you are uploading objects from more than one file and you have previously uploaded objects that are shown in the <b>Objects to be Created</b> section, then the system prompts you to clear the existing objects or append the new objects.</p> <p>You can only select one .xml file at a time, but that file can contain multiple objects. The system segregates each object during the upload process and populates the Objects to be Created section. You can edit individual objects using the Objects to be Created section before they are created in the PeopleSoft Supplier Contract Management library.</p> <p>The system looks for content controls to identify what is being imported. A content control with a <i>new_clause</i> tag indicates a clause, child clause, or section. Then the system looks for embedded content controls tagged as <i>id</i>, <i>title</i>, <i>full_text</i>, and <i>by_reference</i> to import their attributes. Otherwise, all text inside a <i>new_clause</i> content control is imported as full text.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Show Detail View</b> and <b>Show Summary View</b>	<p>Click this button to access the Show Object Details (CS_CLAUSE_IMP_DTL) page. This button toggles between the detail view and the summary view, and the summary view is the default. The button is not available until you upload an XML file and the system parses the objects. The system adds each object extracted from the XML file to the grid.</p> <p>When importing objects, the summary and detail view pages are the same. However, the page layout is different:</p> <ul style="list-style-type: none"> <li>• Use the detail view to maintain the details for one object at a time.</li> <li>• Use the summary view to maintain uploaded objects using a grid and tab format.</li> </ul>
<b>Sel</b> (select)	<p>Select this check box to include the corresponding object during the object creation process. The default value for the check box is selected. When you click the <b>Create Selected Objects</b> button, the system processes selected objects.</p>
	<p>This indicator appears in the Create Status column when the corresponding object is successfully created and added to the contract library. The <b>Sel</b> check box is not available after an object is created.</p>
	<p>This indicator appears in the Create Status column when the corresponding object has an error. An error means that a problem is associated with the object, such as missing information for required fields. These fields must have values:</p> <ul style="list-style-type: none"> <li>• <b>Import Type</b></li> <li>• <b>Object ID</b></li> <li>• <b>Effective Date</b></li> <li>• <b>Description</b></li> <li>• <b>Class Name</b></li> </ul> <p>When errors occur, the system does not create the object in the PeopleSoft system. Select the Error/Warning Message tab to view the errors. See <a href="#">Resolving Import Errors and Warning Messages</a>.</p>

<b>Field or Control</b>	<b>Description</b>
	<p>This indicator appears in the Create Status column when the corresponding object is created but has a warning message. The system creates the object in the contract library and provides warning information.</p> <p>For example, a warning message is generated when invalid bind variables exist in an object and the system has changed the approval status from <i>Approved</i> to <i>Initial</i>. In this example, you must to correct the binds in the object using the Clause Definition or Section Definition page before you can approve the clause or section.</p> <p>Other examples of warning messages are:</p> <ul style="list-style-type: none"><li>• When you add a new effective-dated row to an existing object.</li><li>• When the value for a object ID is truncated to 20 characters.</li><li>• When the title is truncated to 254 characters.</li></ul>

<b>Field or Control</b>	<b>Description</b>
<b>Import Type</b>	<p>Select an option that identifies the type of object when the object is created in the contract library.</p> <p>When you select the XML file, the system identifies each object and populates the Objects to Be Created section. One row is created for each object. You need to assign an import type to each row in this section.</p> <p>Import types include:</p> <ul style="list-style-type: none"> <li>• <i>Child:</i></li> </ul> <p>Select if you want to create this object as a clause and add it as a child clause for the clause or section listed directly above it in the grid. This option enables you to create an entire section with child clauses or clauses that have dependent clauses. This is useful when you reuse sections or clauses with dependent clauses in the library.</p> <p>A child clause must belong to a parent clause or section. To import a child clause, you must first select an import type of <b>Clause</b> or <b>Section</b> in the row above the child object. Then, select <i>Child</i> as the import type in the row below the parent object. If you attempt to create a child object–clause without a parent, the system displays an error message when you click the <b>Create Selected Objects</b> button.</p> <p>When the system creates a parent object, it adds all child object–clauses in the order that they appear in the grid. After you create the clause or section and you want to change the order of the child clauses, you must use the Section Definition or Clause Definition pages.</p> <p>All child object–clauses must have the same date as the parent object. If the dates are not the same, the system sets the date to the date of the parent object and issues a warning for the child object–clause indicating that the date was changed. This prevents child objects that are not valid for the parent object. When the system processes a child object and errors occur, the parent object is not created. The child errors must be corrected.</p> <p>If the parent object that you are creating already exists, then the system updates only the header information. The section structure or clause dependents remain the same as the previous effective-dated rows of the parent object. The only time the systems creates a section structure or clause dependents for a parent object is when the parent object is new.</p>

<b>Field or Control</b>	<b>Description</b>
	<p>The system displays a warning message if you indicate that a child object exists by leaving the <b>Sel</b> check box deselected and selecting a section or clause object. This warning ensures that you intentionally did not select the check box for the child. If you respond to the message by selecting <i>No</i>, the system stops the processing and you can make corrections to your selections. If you respond to the message by selecting <i>Yes</i>, the system creates the parent section clause without the child object. After the system creates the parent, you can add the child clause to the parent using the Clause Definition page or the Section Definition page.</p> <hr/> <p><b>Note:</b> When you create a child clause, the system creates the clause as a standalone clause and attaches it as a dependent to the parent clause.</p> <hr/> <ul style="list-style-type: none"> <li>• <i>Clause:</i> Select to create a clause using this object. If you are creating a child clause for use with a clause, you should select <i>Child</i> as the import type on the line below the current clause line. When the objects are created in the contract library, they are created with an <i>Active</i> status. If a clause is followed by a child clause in the <b>Objects to be Created</b> grid box, the child clause appears as a dependent on the Clause Definition page for the parent clause.</li> <li>• <i>Section:</i> Select to create a section using this object. This option enables you to create an entire section with the intent of adding child clauses below it as part of the import process. This is useful when you reuse sections in the library.</li> </ul> <p>When you select this import type, the system removes values from the <b>Object to be Created</b> grid box that relate only to clauses. For example, on the Categorization tab, values are removed from the <b>Class Name</b>, <b>Approval Type</b>, and <b>Library</b> fields because they relate only to clauses.</p> <p>When you select an object as a section, the system automatically sets the section type to general. This value does not appear on this page, but you can update the section type on the Section Definition page.</p> <hr/> <p><b>Note:</b> If you do not create new child content during the import process, you can use the Clause Definition page or the Section Definition page to create parent–child relationships after the objects are imported.</p> <hr/>

<b>Field or Control</b>	<b>Description</b>
	See <a href="#">Clause Definition Page</a> and <a href="#">Section Definition Page</a> .
<b>Object ID</b>	Displays the ID for the object when it is created. Depending on your numbering scheme and whether the object has an <i>id</i> content control, the field may be blank or may contain a value. The field is required and, if it is blank, you must enter a value before creating the object.
	Click the <b>View Object</b> icon to view an object on the <a href="#">Clause Definition Page</a> or the <a href="#">Section Definition Page</a> after the object is added to the contract library. This button is not accessible until the object is successfully created, which occurs after you click the <b>Create Selected Objects</b> button.
<b>Title</b>	Displays the value within the <i>title</i> content control in the XML file. If the content control in the uploaded file has no value, then this field is blank. Using titles is recommended for sections and clauses because you can number them separately when documents are assembled. Titles are also useful when creating a table of contents in Microsoft Word.
<b>Full Text</b>	Displays the text within the <i>Full Text</i> content control in the uploaded XML file. If the object does not contain a full text content control, then all text within the new_clause block is imported as full text.
<b>Create Selected Objects</b>	Click this button to create objects that you have selected in the <b>Objects to be Created</b> grid box. See <a href="#">Understanding the Object Import and Creation Process</a> .

<b>Field or Control</b>	<b>Description</b>
<b>Clear Objects</b>	<p>Click this button to remove all objects in the <b>Objects to be Created</b> grid. You can access the Defaults for Object Attributes section to make changes to the attributes before you select the next file from which to upload more objects.</p> <p>When you select an XML file and the system populates the Objects to be Created section, the values in the Defaults for Object Attributes section cannot be changed. This button enables you to clear all objects in the Objects to be Created section regardless of whether they have been created. It also opens the fields in the Defaults for Object Attributes section so you can change them. This action enables you to change default values and then select the XML file in which to upload objects.</p> <hr/> <p><b>Note:</b> When you click this button, the system also clear values in the Create Document Configurator section.</p> <hr/>

### Objects to be Created - By Reference Text

Use this tab to view by-reference text that is included with an object. This field is blank unless there is an explicit content control with *by\_reference* indicated in the tag property with the *new\_clause* content control. If the import type is *Section*, values do not appear in this field.

### Objects to be Created - Attributes

Use this tab to view and update the **Import Type**, **Object ID**, and other fields. If you set up default attribute values in the Defaults for Object Attributes section, the fields on this tab display those values after you select the XML file.

<b>Field or Control</b>	<b>Description</b>
<b>Effective Date</b>	<p>Displays the default value that you entered in the Defaults for Object Attributes section. If you did not enter a value in the Defaults for Object Attributes section, the field is blank. You can enter a value or override the current value. The effective date determines when the object is available to be used, and is required.</p> <p>During the import process, effective dates can be overridden for individual objects. When importing objects to create the object library for existing approved objects, enter an effective date that is previous to the current date (in the past). This indicates that the object is active and available to be included during the document generation process based on the start date.</p>



<b>Field or Control</b>	<b>Description</b>
<b>Description</b>	Displays the object description, which is required. You can enter a description or override the default <i>title</i> .
<b>Notes</b>	Displays the default value you entered in the <b>Notes</b> field of the Defaults for Object Attributes section. If you did not enter a note , this field is blank.

## Objects to be Created - Categorization

Use this tab to update basic information about objects. Section import types do not have values for **Class Name**, **Approval Type**, and **Library** fields, and the **Protect in Document** check box.

<b>Field or Control</b>	<b>Description</b>
<b>Numbered</b>	<p>Select to indicate that all objects created during this import session should be numbered. The system uses the Number feature to determine the use of the paragraph style and number format as defined within the system's Microsoft Word template with this clause or section when creating a document. See <a href="#">Setting Up Document Templates and Styles</a>.</p> <p>You can override the value you defined in the Defaults for Object Attributes section. After you import the objects, you can manually update the value for each object before creating it in the contract library. Numbered objects apply to all clauses and sections during the import process.</p>
<b>Insert Page Break Prior</b>	Select to indicate that you want a page break prior to this object when an authored document is created prior to this object.
<b>Protect in Document</b>	Select to indicate that a clause should be protected when it is included in an authored document. You can override the value that you selected in the Defaults for Object Attributes section. After you import the objects, you can manually update the value for each object before you create it in the contract library. Section do not have values for this field.

## Objects to be Created - Error/Warning Messages

Use this tab to review warnings and error messages that result from the last object creation process. For additional information about errors and warnings, see [Resolving Import Errors and Warning Messages](#)

## Result of Last Create

Use this section to review the results of the last object creation process. The section has no data until you create or attempt to create objects in the contract library.

This example illustrates the fields and controls on the Import Clauses/Sections page - Result of Last Create section.

Result of Last Create			
Clauses Created	0	Sections Created	0
Clauses with Errors	0	Sections with Errors	0
Clauses with Warnings	0	Sections with Warnings	0
Number of clauses processed	0	Number of sections processed	0
Last Selected XML File			

This section shows how many clauses and sections were processed and created. Child clauses are included in the clause count column. The results are refreshed when each file is loaded to the contract library and the process completes.

<b>Field or Control</b>	<b>Description</b>
<b>Clauses Created</b> and Sections Created	Displays the number of clauses (including child clauses) and sections that were added to the contract library during the most recent object creation process.
<b>Clauses with Errors</b> and Sections with Errors	Displays the number of clauses (including child clauses) and sections that had errors during the last object creation process. Objects that have errors are not loaded to the contract library.
<b>Clauses with Warnings</b> and Sections with Warnings	Displays the number of clauses (including child clauses) and sections that had warnings during the last object creation process. Objects that have warnings are loaded into the contract library, but you should review the object using the <a href="#">Clause Definition Page</a> or <a href="#">Section Definition Page</a> before using it in a document.
<b>Number of clauses processed</b> and Number of sections processed	Displays the total number of clauses (including child clauses) and sections that the system evaluated and processed during the most recent object creation upload process.
<b>Last Selected XML File</b>	Displays the most recent XML file name that was uploaded to this page. If you have imported multiple files, only the last one appears in this field.

## Create Document Configurator

Use this section to create a document configurator. This section is used after you import objects to the system, and before you navigate away from the page.

When you initially access this page, the **Create** button is not available. It becomes available after you have selected objects. You can continue to add objects that are to be part of a configurator using the **Create Selected Objects** button as long as you do not navigate away from this page. You can only create one configurator during your session. Therefore, include all the objects to be used with the configurator before you click the **Create** button.

After you create a document configurator, you can:

- Maintain and add additional objects to the configurator using the [Document Configurator Definition Page](#).

For an example of how this process works, see [Creating and Reviewing a Document Configurator After Importing Objects](#).

- Create more clauses and sections.

The **Create** button changes to an **Append** button if you remain on this page. You can select additional clauses and sections, and append them to the document configurator.

<i>Field or Control</i>	<i>Description</i>
<b>Configurator ID</b>	<p>Enter a unique ID for the configurator. You must define configurator details before you click the <b>Create</b> button.</p> <p>If you import additional objects after you create a document configurator, you cannot add them to the configurator. Instead, use the <a href="#">Document Configurator Definition Page</a> to add new objects to the configurator.</p>
<b>Source Transaction</b>	<p>Select a source transaction to assign to the configurator. You can use a configurator for only one valid source transaction. Valid values include:</p> <ul style="list-style-type: none"> <li>• <i>Ad Hoc</i></li> <li>• <i>Multiple Sources</i></li> <li>• <i>Purchase Orders</i></li> <li>• <i>Purchasing Contracts</i></li> <li>• <i>Sourcing Event</i></li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Description</b>	Enter a description for the configurator. After you create the configurator, the system uses the description as a link to the <a href="#">Document Configurator Definition Page</a> , where you can update the configurator and preview the related Microsoft Word document.
<b>Create</b>	<p>Click to add the document configurator to the database. After the system creates the configurator, the <b>Create</b> button is no longer available.</p> <hr/> <p><b>Note:</b> You must specify the details for the configurator before you click this button.</p> <hr/> <p>After you create the configurator, this button and the configurator fields are no longer available.</p> <p>If you remain on this page, you can add more clauses and sections and this button changes to an <b>Append</b> button.</p>
<b>Append</b>	Click to append additional clauses and sections to an existing document configurator.

## Resolving Import Errors and Warning Messages

Use the Error/Warning Message tab to review errors and warnings for objects that cannot be created by the system. You can also use the Result of Last Create section to review how many objects were processed and created.

This example illustrates the fields and controls on the Import Clauses/Sections page: Error/Warning Messages tab.

Objects to be Created ?				
Personalize   Find   First 1-3 of 3 Last				
Content   By Reference Text   Attributes   Categorization   <b>Error/Warning Messages</b>				
Sel	Create Status	Import Type	Object ID	Message
<input checked="" type="checkbox"/>		Clause	RK-IMP-CLAUSE11	Title has already been used for another clause.
<input checked="" type="checkbox"/>		Clause	RK-IMP-CLAUSE2	Cannot add object because effective dated row 05/05/2014 already exists.
<input checked="" type="checkbox"/>		Clause		Object ID field cannot be blank Title has already been used for another clause.

During the creation process, the system makes three passes through values on the Import Clauses/Sections page to process the imported objects:

1. During the first pass, it processes all child clauses.
2. During the second pass, the system creates all clauses and clauses with dependents.

3. During the third pass, the system creates sections and sections with a clause structure.

If you select the **Error on Duplicate Title** or **Error on Duplicate Description** check box in the Defaults for Object Attributes section, the system generates an error if the title or description is a duplicate in the contract library for another clause or section. The errors that appear on the Error/Warning Messages tab are refreshed each time you click the **Create Selected Objects** button. If you deselect the check boxes, the system does not check for duplicate titles and descriptions and it does not generate duplication errors.

The Import Clauses/Sections page shows errors when similar objects that were uploaded to the contract library already existed in the library. You can load similar data into the library, but you must use different effective dates. If you use different effective dates, the system loads the data and provides a warning message that a new effective-dated row was added.

The system uses the Clause Definition and Section Definition component interfaces to create objects. During the import process, the system creates the error message in *psmessages* for the process session.

This table describes potential errors and how to fix the objects:

<b>Error</b>	<b>Resolution</b>
Cannot add clause because effective-dated row 01/01/xxxx already exists.	If you are adding another effective-dated row, then you must use an effective date for the clause that is later than the current effective date. Otherwise, enter a different clause ID.
Description for clause was already used for another clause.	The system has found a duplicate clause or section description.  Change the clause description or deselect the <b>Error on Duplicate Description</b> check box in the <b>Defaults for Clause Attributes</b> group box.
Description cannot be blank.	Enter a value in the <b>Description</b> field on the Attributes tab in the <b>Clauses to be Created</b> grid.
Title was already used for another clause.	The system has found a duplicate clause or section title. Change the clause title or deselect the <b>Error on Duplicate Title</b> check box in the <b>Defaults for Clause Attributes</b> group box.
<b>Clause ID</b> field cannot be blank.	The <b>Clause ID</b> is a required field. Enter a unique value in the field.
<b>Effective Date</b> cannot be blank.	Enter an effective date for the selected clause. It is recommended that you back date effective-dated clauses and sections in the library so that content can be referenced based on the begin date of contracts that you create.
Effective date sequence must be greater than effective date sequence of current record.	Use the Attributes tab to change the effective date to a date later than the effective date of the existing section or clause.

This table describes potential warnings and how to fix the objects:

<b>Warning</b>	<b>Resolution</b>
Approval status is set to Approved, but clause contains invalid bind variables - clause is created but status is changed from Approved to Initial.	Clauses cannot be approved until bind variables are valid. Use the <a href="#">Clause Definition Page</a> to view the clause and determine how to fix the bind.
Clause already exists; added a new effective-dated row 01/01/xxxx.	No action is needed. This warning informs you that the system added a new effective date to the existing clause.
Value for Clause ID is too long and is truncated to 20 characters: <Clause ID value from file>	No action is needed.
Value for Title is too long and is truncated to 254 characters: <Title value from file>	No action is needed.
Clause already exists; added a new effective-dated row effective date	No action is needed.
Dependents will not be updated for existing clause.	The import process enables you to add child dependent clauses to newly created parent clauses or sections as part of a specific import session. These child clauses must be manually added as a dependent clause using the <a href="#">Clause Definition Page</a> or <a href="#">Section Definition Page</a> after you complete the import process.

## Creating and Reviewing a Document Configurator After Importing Objects

Use the Create Document Configurator section of the Import Clause/Section page to create a document configurator after you have uploaded all the objects into the contract library. The document configurator that is created includes the objects that were loaded to the contract library. This feature enables you to create a configurator using a legacy document.

The process of creating a document configurator from the Import Clauses/Sections page is considered to be the initial step to creating a document configurator. The document configurator and its content may require additional edits after it is created because the content and document format from the system depend on:

- The content selected for the import.
- The content format.
- The Microsoft Word template that is use by system when it assembles the document for the newly created configurator.

When you click the Create button on the Import Clauses/Sections page, the system performs these tasks:

- Checks that the configurator ID you specified does not already exist.
- Ensures that the **Configurator ID**, **Source Transaction**, and **Description** fields were completed.
- Ensures that all binds for clauses to be added to the document configurator have the same source transaction as the configurator.

- Checks that the document format and options are set up for the SetID that you specify; otherwise, it displays an error.
- Assigns the same SetID as specified on the Import Clauses/Sections page.
- Sets the configurator availability status to *In Progress*.
- Uses the Microsoft Word template that is specified on the Document Format and Options Page for the SetID.
- Adds the date and time that the configurator was updated or created.
- Provides user information for who updated or created the configurator.
- Adds objects that were successfully created, even if they are unapproved.

You can perform multiple imports using the Import Clauses/Sections page and before creating a configurator, but you must remain on the Import Clauses/Sections Page. After you have uploaded the objects into the contract library and you exit the Import Clauses/Sections page, the objects are removed from the Import Clauses/Sections page and not eligible to be included in a new configurator using the Import Clauses/Sections page. You can only create the configurator once when using the Import Clauses/Sections page, so ensure that you have imported all the objects that you want to add to the new configurator. After you create the configurator, and you remain on the Import Clauses/Sections page, you can import additional objects from another .xml file. The system changes the **Create** button to an **Append** button and you can select it to append the objects to the newly created configurator. When you exit the Import Clauses/Sections page, this feature is no longer allowed, and you must use the Document Configurator page to add additional objects.

### Example: Import Clauses/Sections Page Before Creating a New Document Configurator

This is an example of the Import Clauses/Sections page after clicking the **Create Selected Objects** button and before clicking the **Create** button.

This example illustrates the fields and controls on the Import Clauses/Sections page showing object attributes and document configurator information.

Show Detail View

Objects to be Created ?
Personalize | Find |  |  | First 1-3 of 3 Last

Content	By Reference Text	Attributes	Categorization	Error/Warning Messages		
SeI	Create Status	Import Type	Object ID	Effective Date	Description	Notes
<input type="checkbox"/>	✓	Clause	RK-IMP-CLAUSE1	05/05/2014	rk-imp-clause1	
<input type="checkbox"/>	✓	Clause	RK-IMP-CLAUSE2	05/05/2014	rk-imp-clause2	
<input type="checkbox"/>	✓	Clause	RK-IMP-CLAUSE3	05/05/2014	rk-imp-clause3	

Select All
Clear All
Create Selected Objects
Clear Objects

Result of Last Create
Create Document Configurator ?

Configurator ID:

Source Transaction:

Description:

You can specify a new or existing Configurator ID. If you specify an existing Configurator ID, objects that are successfully created will be appended to the specified Configurator ID.

This example shows clause objects that have been created in the contract library. When these objects are included in a new document configurator, they will be sequential in the same order as shown. At this step of the process, you can:

- Click the **Select XML File** button to append new objects to the new configurator.
- Click the **Clear Objects** button to import additional files to add to the Objects to be Created section.
- Click the **Create** button to create a new document configurator that includes all objects listed in the Objects to be Created section.

After creating the configurator, access the [Document Configurator Definition Page](#) and select the configurator that you created.

### Example: Import Clauses/Sections Page After Creating a New Document Configurator

This example shows the Import Clauses/Sections page after clicking the **Create** button.

This example illustrates the fields and controls on the Import Clauses/Sections page after creating a new document configurator showing the **Append** button.

The screenshot displays the 'Objects to be Created' interface. At the top, there is a 'Show Detail View' button. Below it is a navigation bar with tabs for 'Content', 'By Reference Text', 'Attributes', 'Categorization', and 'Error/Warning Messages'. A search bar and pagination controls (First, 1-7 of 7, Last) are also present. The main area is a table with the following data:

Sel	Create Status	Import Type	Object ID	View Object	Title	Full Text
<input type="checkbox"/>		Clause	RK-IMP-CLAUSE1		This is a very long title for clause rk-import-sdt 1234567890	This is the full text of imported clause (sdt1).
<input type="checkbox"/>		Clause	RK-IMP-CLAUSE2		This is the title	This is the full text of imported clause (sdt2).
<input type="checkbox"/>		Clause	RK-IMP-CLAUSE3		This is the title	This is the full text of imported clause (sdt3).
<input type="checkbox"/>	✓	Clause	RK-IMP-CLAUSE4		This is a very long title for clause rk-import-sdt 1234567890	This is the full text of imported clause (sdt1).
<input type="checkbox"/>		Clause	<input type="text" value="Rk-import-sdt2"/>		This is the title	This is the full text of imported clause (sdt2).
<input type="checkbox"/>		Clause	<input type="text" value="Rk-import-sdt3"/>		This is the title	This is the full text of imported clause (sdt3).
<input type="checkbox"/>		Clause	<input type="text"/>			This imported clause has no title; just full text. This is the full text of imported clause (sdt).

Below the table, there are buttons for 'Select All', 'Clear All', 'Create Selected Objects', and 'Clear Objects'. A 'Result of Last Create' section is also visible. At the bottom, the 'Create Document Configurator' section includes a 'Configurator ID' field with the value 'RK-IMP-CONFIG1', a 'Source Transaction' dropdown set to 'Ad Hoc', a description field containing 'new configurator rk-imp-config1 description', and an 'Append' button.

This example shows the **Append** button, which is only available after creating a new document configurator.



### Example: Document Configurator Definition page After Importing Clauses

This example shows the objects in the Content Elements section on the Document Configurator Definition page.

This example illustrates the fields and controls on the Document Configurator Definition page after importing clauses.

#### Document Configurator Definition

SetID: SHARE

Source: Ad Hoc

Configurator ID: RK-IMP-CONFIG1 [Where Used](#)

\*Availability Status: In Progress

Configurator Type: ▼

Wizard ID:

\*Word Template Name: STDTEMPLATE\_2007.XML

Logging: Log Warnings and Wizard

\*Description: new configuratro rk-imp-config1 description

Notes:

Delete

[Associate to Configurator Groups](#)

Use for Amendments

Use for Executive Summary

Include Table of Contents If Available

---

▶ **Configurator History**

---

Refresh Retrieve last saved configurator.

View As Of Date: 05/05/2014

Preview Document

Save

---

\*View Outline to Level: 9

---

**Content Elements** [Personalize](#) | [Find](#) | [Print](#) | [First](#) | 1-3 of 3 | [Last](#)

Basic Info	Details	More Details			
Outline Position	Content Type	Content ID	Content Description		
1	Clause	RK-IMP-CLAUSE1	rk-imp-clause1	+	+
2	Clause	RK-IMP-CLAUSE2	rk-imp-clause2	+	+
3	Clause	RK-IMP-CLAUSE3	rk-imp-clause3	+	+

This example shows the new document configurator and the structure that was defined on the Import Clauses/Sections page. The system has applied the sequential order of the objects to the outline position in the configurator. You can click the **Preview Document** button to view the section and update the configurator using this page.

### Related Links

[Setting Up Document Configurators](#)



## Chapter 6

# Setting Up Other Elements in the Contract Library

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## Setting Up Rules

### Page Used to Set Up Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Rules Page</a>	CS_RULES	Set up authored document rules.

## Understanding Authored Document Rules

A rule is a user-defined set of conditions that the system uses to determine whether to add specific clauses or sections to a generated authored document. Rules also determine whether an alternate clause should substitute the initial clause that is intended for the document.

When a document is generated, rules can reference bind variables, which enable you to retrieve actual field values from a transaction record or wizard response. Depending on how an author responds to wizard questions or other transactional bind values that are specific to the document, rules can determine whether to include additional content within the document.

See [Understanding Bind Variables](#).

This list summarizes how you use rules:

- Create standard rules to evaluate transactional information.

You can define a rule to check for a specific supplier. Using the predefined bind variable `VENDOR_ID`, which is supplied by PeopleSoft Supplier Contract Management, you can retrieve the actual field value from a purchasing contract transaction and include the content that is specific for that supplier.

- Create alternate rules to substitute a main clause with an alternate clause.

An example of using an alternate clause might be when a main clause limits liability, but under certain conditions, such as a specific supplier ID, you need to substitute a liability clause with a modified version. You can do this by creating an alternate rule that checks whether the Supplier (`VENDOR_ID`) bind variable is `XYZ`. You can add an alternate clause and associated rule in the Alternates section of the [Clause Definition Page](#).

- Create standard rules to evaluate wizard responses.

Rules that are used in conjunction with wizard responses provide a powerful tool for controlling additional content when documents are generated. You use this feature by defining wizard variables. First, you define a wizard with related question groups and questions, which are designed to prompt the document author for specific values. Second, you create a rule for the system to evaluate those values and take the appropriate action to add content in the completed document.

For example, to use a rule in a wizard that adds an on-site inspection section to a building document, you would follow these steps:

1. Create a wizard that contains the question "Is an on-site inspection required?"
2. As a result of step 1, a wizard variable defined as `%%ONSITEINSP%%` is populated with a yes or no value.
3. Create a rule called *ONSITE* that has the criteria to check *If ONSITEINSP = Y*.
4. If the rule is true, the system includes the INSPECTION section in the **Content Elements** grid for the rule.
5. Place the ONSITE rule in the document configurator where you want to insert the inspection section.
6. A document author creates a document using the wizard and responds *Yes* to the inspection question.
7. The system processes the rule when the document is generated and, based on the response, determines to include the INSPECTION section in the document.

---

**Note:** If you enter an unformatted rule value that requires a formatted value, the system automatically formats the value that you enter.

---

See [Setting Up Rules](#).

## Effective Dating

Rules are effective-dated so that you can revise them over time without affecting prior versions of the rule. The system includes the correct version of an active rule when a document is generated based on the start date of the contract. Each rule has its own identifier, and you can control the Active or Inactive status for the rule.

## Rule Criteria

You can establish basic rule criteria for standard and alternate rules with basic operands and binds. Basic queries can reference multiple bind variables and values, but all comparisons must be processed with a basic *and* or *or* statement for the criteria. You can also use more advanced rules that use parentheses to combine statements for more complex data sets when needed.

## Repeating Rules

A repeating rule has binds that are from a transaction level that is greater than zero. If a rule is created for a child-level transaction that repeats, such as a contract item line for a transaction at level one, then the

content types and their children that are attached to that rule are transferred into the document for each row of a repeating rule.

Content elements (sections and clauses) that are listed for a rule should not have binds, or should have only level-zero binds, or the same level binds as the criteria. For example, if the criteria for a transactional contract item is at level one, then the system cannot list content element objects in the rules grid at a level greater than one.

You can include only rules with bind variables that are greater than level zero in a repeating section of the same level. For example, if the rule evaluates a bind variable for the transactional contract item ID at level one, the rule must be included on a section that also contains a bind variable at the same level. Thus, you cannot include rules with bind variables that are greater than level zero on the document configurator. Furthermore, if you do require a content element to contain a bind value that is greater than level zero, then the bind variable must be associated with the same record view as the bind that is used within the rule.

See [Understanding Bind Variables](#).

## Alternate Rules

When rules are attached to alternate clauses, the system uses the rule to determine which alternate clause to use. Each alternate clause can have a rule attached to it. The attached rule must have a type of *Alternate*. The system checks the alternate rules, in sequence, to find the first alternate for which the rule is true. If no rule is true, the system uses the original main clause and does not make a substitution.

When a document is generated, if a substitution takes place, the system replaces the lead clause information with the alternate clause information in the document.

---

**Note:** Clause substitutions occur for only a primary clause and not an alternate clause. In the previous example, if the alternate clause has alternate clauses and rules defined for it, the system does not evaluate those alternate clauses.

---

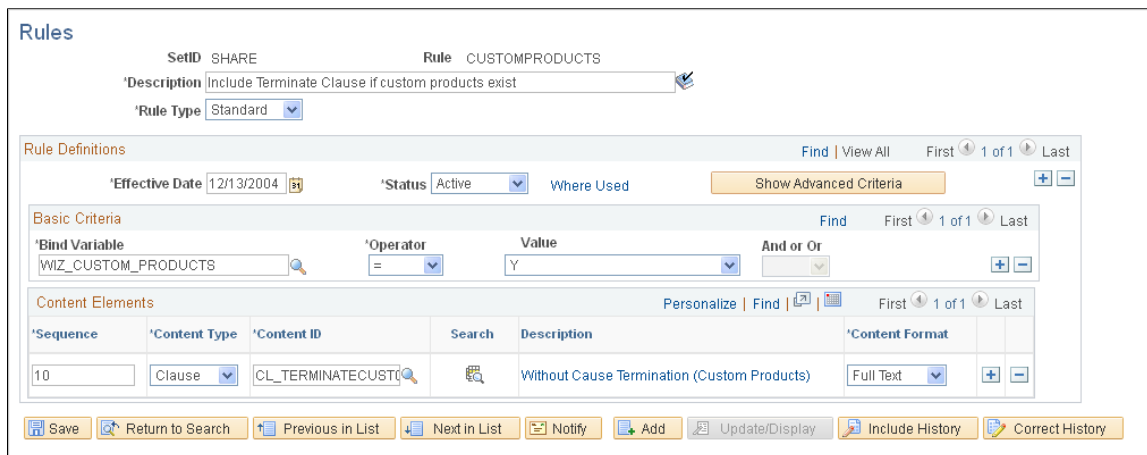
## Rules Page

Use the Rules page (CS\_RULES) to set up authored document rules.

Navigation:

**Supplier Contracts > Manage Contract Library >Contract Library Rules**

This example illustrates the fields and controls on the Rules page.



Use this page to define rule definitions, criteria, and the content to include when the rule is true. A rule can be associated directly with a document configurator or associated with a section. Rules are a set of conditions that, when evaluated, render a true or false result. When a standard rule type is true, the system includes additional clauses or sections in the document configurator or within a section in the configurator. The system adds these to the **Content Elements** grid on the [Document Configurator Definition Page](#) and into the document when you use the configurator to generate an authored document.

When an alternate rule type is true, the system substitutes the alternate clause that is defined for the primary clause for which the alternate is a member. Use the [Clause Definition Page](#) to define the alternate clause. The system bases rules on the transactional-based or wizard-based bind variables that it resolves when a document is generated and refreshed.

You can define basic or advanced criteria for rules. The difference between basic and advanced criteria is that advanced rules enable you to place parentheses markers around statements and create combinations of query-type, statement, or both in the rule criteria.

<b>Field or Control</b>	<b>Description</b>
<b>Copy From</b>	Click to access the Copy Information From page (CS_RULE_COPY_SP). The button is available when you are adding a new rule and enables you to copy an existing rule to create the new rule. When you click the button, the system provides a list of existing rules. After you make the copy, you can incorporate new values into the rule.
<b>Rule Type</b>	Select a value that determines how the system uses the rule. Values include:  <i>Standard:</i> Select to use this rule with any section or configurator. This is the default value for new rules.  <i>Alternate:</i> Select to use this rule with alternate clauses. The system links the rule to the alternate clause on the parent clause and not within the rule itself.

<b>Field or Control</b>	<b>Description</b>
<b>Show Advance Criteria and Show Basic Criteria</b>	Click this toggle button to determine advanced criteria or define basic criteria.

## Basic Criteria

Use this section to define basic selection criteria for a rule. This feature enables you to define basic queries to evaluate one or more transactional or wizard bind variables. When a document is generated or refreshed, the system renders a true or false result and takes the appropriate content action, such as including an additional clause or substituting an alternate clause.

<b>Field or Control</b>	<b>Description</b>
<b>And or Or</b>	<p>When more than one row of criteria exists within basic criteria, the system can evaluate all rows using <i>and</i> or <i>or</i> statements:</p> <ul style="list-style-type: none"> <li>• When using <i>and</i>, all rows of the criteria must evaluate as true for the rule to be true.</li> <li>• When using <i>or</i>, if any row of the evaluated criteria is true, then the rule is true.</li> </ul>

## Advanced Criteria

Use this section to define advanced criteria for a rule. Advanced criteria enable you to define more complex sets of criteria. You can use advanced criteria when the basic criteria for a rule is not sufficient. Advanced criteria enables you to place open and close parentheses around one or more criteria, and enables you to use the *AND* and *OR* constructions when needed.

<b>Field or Control</b>	<b>Description</b>
<b>Open</b>	Select the open parenthesis character to signify the start of a group of criteria to enclose. For example, if you have three criteria, you can create a selection criteria of (A or B) and C by placing an open parenthesis on the line for A.
<b>Bind Variable</b>	Select a bind variable for retrieving field values from a record. The variable that you select determines the field type that you must use in the <b>Value</b> field.

<b>Field or Control</b>	<b>Description</b>
<b>Operator</b>	<p>Select a value that determines the action that the system applies to the criteria that you define from the bind variable record and the value in the <b>Value</b> field. For example, to place amounts that are equal to or greater than 100,000 from the transaction bind variable into the document, use the =&gt; operator and enter 100000 in the <b>Value</b> field. You should enter the correct form of the criteria to match the operation that you want the system to perform.</p> <p>Values are:</p> <p>&lt;: Include values that are less than the value that you enter in the <b>Criteria</b> field.</p> <p>&lt;=: Include only values that are less than or equal to the <b>Criteria</b> field.</p> <p>&lt;&gt;: Include values that are not equal to the value that you enter in the <b>Criteria</b> field.</p> <p>=: Include only values that are equal to the <b>Criteria</b> field.</p> <p>&gt;=: Include values that are equal to or greater than the <b>Criteria</b> field.</p> <p>&gt;: Include values that are greater than the <b>Criteria</b> field.</p>
<b>Value</b>	<p>Enter the value to use when applying the operators. For example, if you select &gt;= in the Operator field for an item description bind variable, you could enter 100000 as the value. The system will include only values that are equal to or above 100000.</p>
<b>Close</b>	<p>Select the close parenthesis character to signify the end of a group of criteria to enclose. For example, if you have three criteria, you can create a selection criteria of (A or B) and C by placing a close parenthesis on the line for B.</p>
<b>AND or OR</b>	<p>Select <i>AND</i> or <i>OR</i>. This field enables you to create or modify statements for the operators and criteria that you enter. Select <i>AND</i> to create additional criteria and apply a logical <i>and</i> between the rule criteria. Select <i>OR</i> to create a logical <i>or</i> between the rule criteria.</p>



<b>Field or Control</b>	<b>Description</b>
<b>Question Mapping</b>	<p>Displays the wizard question if a bind variable exists in a wizard. When the system creates and refreshes the document, it populates the bind. If a variable is a transactional bind, the system displays the record, field, and level associated with the transactional bind. This column is displayed when viewing a rule from the Document Configurator page.</p> <p>This field is not shown when adding a new rule.</p>
<b>Question Group</b>	<p>Displays the question group in which the rule is used. This column is displayed when viewing a rule from the Document Configurator page.</p> <p>This field is not shown when adding a new rule.</p>
<b>Source Transaction</b>	<p>Displays the source transactions that are applicable to this rule when the rule uses a wizard bind. This column is displayed when viewing a rule from the Document Configurator page.</p> <p>This field is not shown when adding a new rule.</p>

## Content Elements

Use this section to select document elements to which you want to attach standard type rules. This grid appears only for standard rules. Clauses in this section do not apply alternates.

<b>Field or Control</b>	<b>Description</b>
<b>Sequence</b>	For standard rules, enter the sequence in which the system should add sections and clauses during document generation.
<b>Content Type</b>	Select <i>Clause</i> or <i>Section</i> .
<b>Content ID</b>	Select the clause or section ID.
<b>Content Format</b>	Select <i>Full Text</i> or <i>Reference Text</i> . This selection determines which content to include for a clause. For sections, the content format is always <i>Full Text</i> .

## Setting Up Binds

### Pages Used to Set Up Binds

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Source Transaction Structures Page</a>	CS_SRC_TRANS_STRCT	Define a hierarchical structure for source transactions.
<a href="#">Wizard Bind Prompt Tables Page</a>	CS_PROMPTTBL_DEFN	Define wizard bind prompt tables.
<a href="#">Bind Mappings Page</a>	CS_BIND_MAPPING	Map bind variables to record views and source records.
<a href="#">Bind Definition Page</a>	CS_BIND_DEFINITION	Set up bind definitions.
<a href="#">Search for All Content Instances Page (Search Content by Type)</a>	CS_CONTENTS_XREF	Search for where binds are used.

### Understanding Bind Variables

To work with bind variables, you must understand:

- What binds are.
- Bind definition steps.
- System-supplied binds.
- Bind use standards.

#### Binds

Binds are variable definitions that enable you to map values from a source transaction or wizard to content within clauses, sections, and Microsoft Word templates. When an authored document is generated, the system processes binds and uses the value of the record field that is mapped to the transaction bind variable, or the response value of a wizard bind variable, to replace the bind variable placeholder in the document. You can also use binds in rules, which allow the system to include additional or alternate clauses in authored documents.

Binds are stored in a central table that you access using the [Bind Definition Page](#). A bind can apply to specific transactions or across a variety of transactions.

The system uses binds in these areas:

- Within the body of text in document clauses and sections.

When using bind variables inside body text, the variables must be enclosed within two pairs of percentage symbols (%%): two symbols before the variable and two symbols after the variable. When

the system validates binds, it searches for these symbols. This validation also includes binds that are defined to be used with a wizard. Wizard binds can exist without a source transaction object. Binds for wizards are defined in the CS\_BIND table, where the CS\_BIND\_TYPE is Wizard=3.

- Within Microsoft Word templates.

Bind variables such as a version number, contract number, or amendment number can be added to the header and footer section of a Microsoft Word template. If a document or Microsoft Word template is set up with transaction bind variables, then the transaction source must be the same when you associate the template to a document configurator. If they do not match, you could have unresolved binds in the header and footer. For example, if you have an authored document where the source transaction is a purchasing contract, but the Microsoft Word template contains ad hoc bind variables. If this occurs, the system leaves the binds unresolved in the authored document.

- Within rules.

When the system processes a bind, it replaces the bind with the actual record and field mapping. It then evaluates the rule to determine whether it is true. Binds that are used in rules should always reference the codes, not the XLAT (translated) value.

- Within the bind-map definition of the source transaction.

The system maps the bind to its equivalent record and field for each source transaction. This map provides the link between the bind variable, the record (view), and field from which to retrieve the value. The system determines whether the bind is of a repeating nature because each source record view has a defined level. For example:

- A bind variable that is mapped to a contract header for the contract amount would be a zero level, and it does not repeat.
- A bind variable that is mapped to a contract item list, which is at level one (multiple items per contract), inherits a repeating characteristic of level one.
- A bind variable that is mapped to contract milestones, which are children of a contract line, inherits a repeating characteristic of level two.

---

**Note:** Many of the source transaction records, views, binds, bind mappings, and bind variables that are frequently used are predefined in the system. You can use the system to include additional views, binds, and bind mappings as needed within the source transactions that are provided.

---

## Bind Definition Steps

To define and use binds in addition to those that the system supplies:

1. Define the bind that includes the bind and field types.

Use the [Bind Definition Page](#) to add these values:

- *Wizard* type binds are those that are used with the contract wizard.
- *Transactional* type binds originate from a source transaction.

These are non-wizard binds, such as those related to a purchasing contract transaction.

2. Review the defined source transaction structure, which includes the source and parent records.
3. Map the binds to the view of the source transaction record.
4. Insert bind variables within clauses or rules.

## System-Supplied Binds

Bind setup is intended for advanced users, but the system supplies predefined binds that you can use with fields for source transactions. All bind types that the system supplies are TRANS type binds. PeopleSoft Supplier Contract Management delivers many binds, which can be viewed by accessing the [Bind Definition Page](#).

## Bind Standards

Clauses and sections are stored based on the name of the record view and the level in the child source transaction table. These standards apply:

- Clause and section binds use these standards:
  - Clauses can have a mixture of level zero binds.
 

Within a clause level, binds can be derived from different level zero record views.
  - Wizard binds are always implied as level zero binds because they do not repeat.
  - When more than one bind exists within a clause, rule, or section, the bind variables must be mapped to fields within the same record view, if the bind level is greater than zero.
 

For example, you cannot have a repeating clause that references item binds (level one) and contract header level agreements (level one) because as the system generates a document, it must repeat the clause based on one repeating record view.
  - For child clauses or sections, where the parent and child clause has binds:
 

The record keys for the child bind variables must include the key structure of the parent clause or section bind variables.

If the parent clause or section does not repeat, its children can have no binds, level-zero binds, or level-one binds.

If a parent clause or section repeats at level one, its children can have no binds, level-zero binds, level-one binds on the same view used in the parent clause, or level-two binds on a view that is a child of the view used in the parent clause.

If a primary clause or section repeats at level two, its children can have no binds, level-zero binds, level-two binds on the same view used in the parent clause, or level-three binds on a view that is a child of the view used in the parent clause.
- Rule binds use these standards:
  - When you are adding a rule to a section object, if that rule repeats, such as the criteria is dealing with binds at levels greater than zero, then the rule can be attached only under a section that is repeating on that same level of information.

For example, a section repeats on Item:

```
- Rule If item = 'xxxx' then include clause A
- Rule if Item = 'yyy' then include clause B
- Clause C
- Clause D
```

- Rules do not limit display data; they are used to include an object in the data.

For example, if you want a rule to represent a kind of item, such as a service or a product, then you define the rule in the following way: If item = product, then include the section *Products*. If item = service, then include the section *Services*.

```
Rule A = Products
Rule B = Services
```

If you want to group the products and services at level one, there are two options:

### Option 1:

```
Section Services = binds on SERV_ITEMS_VW that points to a view that only=>
brings in services.
Section Products = binds on PROD_ITEMS_VW that points to a view that only=>
brings in products.
```

### Option 2:

Create a view ITEM\_VW that is ordered by category (service or product)

```
Section repeats on the item
Rule A = Products
Rule B = Services
```

- Binds that the system uses in header and footer sections of the Microsoft Word template use these standards:
  - You can only include level-zero binds. Repeating binds are not supported.
  - All bind variables used must belong to the same source transaction.

## Related Links

[Setting Up Rules](#)

## Source Transaction Structures Page

Use the Source Transaction Structures page (CS\_SRC\_TRANS\_STRCT) to define a hierarchical structure for source transactions.

Navigation:

**Supplier Contract > Supplier Contracts Setup > Source Transaction Structures**

This example illustrates the fields and controls on the Source Transaction Structures page.

### Source Transaction Structures

This information is used to define the relationship of source transaction base record heirarchy. This is then used in the Bind Mapping transaction to define the association with bind variables and their views to the source structure.

**\*Source Transaction**  
Ad Hoc ▼

Record Hierarchy	Personalize	Find	View All	First	1-2 of 2	Last
Source Record	Level	Parent Record				
CS_DOC_HDR	0	CS_DOC_HDR	+	-		
CS_CONTACT	1	CS_DOC_HDR	+	-		

Use this page to define a hierarchical structure of source transactions. After defining the structure, you can associate a bind variable with the actual record or view the field name from which you want to retrieve data. See [Bind Mappings Page](#).

**Note:** Oracle delivers predefined source transaction structures as system data. These are documented in this topic. You cannot change these delivered structures.

<b>Field or Control</b>	<b>Description</b>
<b>Source Transaction</b>	<p>Select the type of source transaction for the base record. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Ad Hoc</i>: This is a general-use source transaction that is not associated with a purchasing contract, purchase order, or source event. However, it does allow the system to bind information for fields that are visible on the <a href="#">Document Management Page</a>.</li> <li>• <i>Purchasing Contracts</i>: This source transaction enables you to create authored documents that can reference and include purchasing contract information such as supplier name, maximum amounts, and items on the contract.</li> <li>• <i>Purchase Orders</i>: This source transaction enables you to create authored documents that can reference and include purchase order information such as supplier name, items and quantities on the PO.</li> <li>• <i>Sourcing Events</i>: This source transaction enables you to create authored documents that can reference and include sourcing event information such as payment terms, items, and bid factors.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Source Record</b>	Enter the core transactional record, for each data level, to which all views need to be linked when you enter bind mappings.
<b>Level</b>	Enter a numeric value that indicates the level in the record hierarchy at which the source record exists, for the indicated source transaction. The system uses the level to validate binds, which ensures the proper setup of repeating elements.
<b>Parent Record</b>	Enter the parent record if the source record is at a level that is greater than zero in the structure. The parent record is the record that the specified source record relates to in the hierarchy. This helps to resolve repeating binds when document elements are generated. If the level is equal to zero, then the parent and source records should be the same. This ensures that document elements are used in the correct parent and child relationship.

## Wizard Bind Prompt Tables Page

Use the Wizard Bind Prompt Tables page (CS\_PROMPTTBL\_DEFN) to define wizard bind prompt tables.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Wizard Bind Prompt Tables**

This example illustrates the fields and controls on the Wizard Bind Prompt Tables page.

### Wizard Bind Prompt Tables

Prompt tables for Wizard Bind Variables must be simple keys and must already be defined in the database

**Prompt Table** CS\_EFFSTAT\_VW      Effective Status XLAT view

**Prompt Fieldname** EFF\_STATUS

**\*Description**

Use this page to define a list of values to be used with a wizard bind. These tables can be assigned to a specific bind and can be accessed when you run a wizard. Prompt tables are primarily used when generating an ad hoc document because some values cannot be determined from a source transaction; however, the values exist in the system and you want to provide the author a list of values from the database. After you define the prompt table, you can create a wizard bind variable that is associated with the prompt table using the [Bind Definition Page](#).

---

**Note:** The alternate method to providing a list of values through a prompt table is to use a static list that you define for a wizard variable, within a question group. See [Valid Values and Navigation Page](#).

---

Prompt tables for bind variables permit records that contain only a single key, which is the value from which you want to prompt. If existing records in the database do not meet your needs, contact your system administrator about creating a new view to retrieve required values.

<b>Field or Control</b>	<b>Description</b>
<b>Prompt Table</b>	Select an existing table that has only one key field.
<b>Prompt Fieldname</b>	Displays the field name for the key field for the table entered in the <b>Prompt Table</b> field.
<b>Description</b>	Enter the description that you want to use for the prompt table. The system initially populates this field with the description for the prompt field name. You can override that description.
<b>Delete</b>	Click to permanently delete a prompt table. The system displays a warning message indicating that you will delete the wizard prompt table.

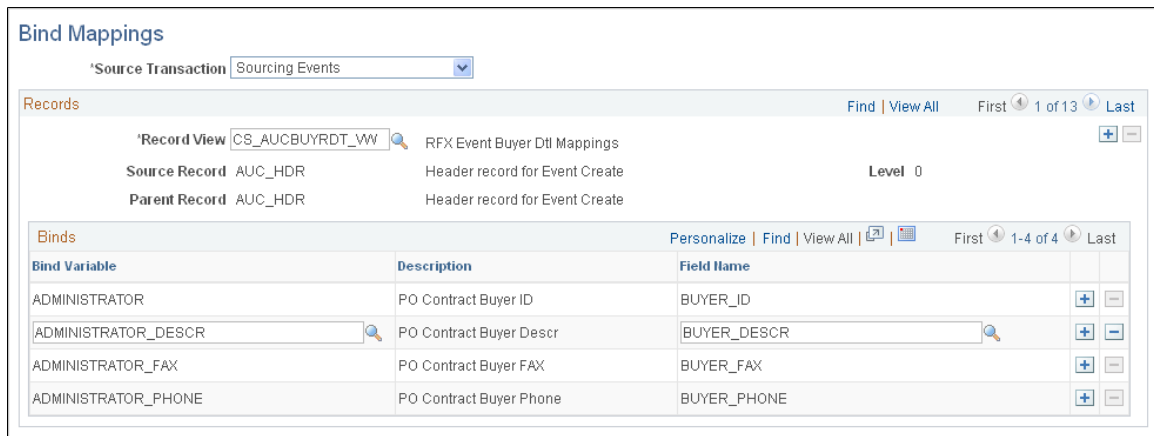
## Bind Mappings Page

Use the Bind Mappings page (CS\_BIND\_MAPPING) to map bind variables to record views and source records.

Navigation:

**Supplier Contract > Supplier Contracts Setup > Create Bind Mapping Definition**

This example illustrates the fields and controls on the Bind Mappings page.



## Prerequisites

Define the hierarchical structure of source transaction structures using the [Source Transaction Structures Page](#).



## Bind Mappings

<i>Field or Control</i>	<i>Description</i>
<b>Source Transaction</b>	<p>Select the type of source transaction that you want to map to a bind. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Ad Hoc</i>: This is a general-use source transaction that is not associated with a purchasing contract, purchase order, or source event. However, it does allow the system to bind information for fields that are visible on the <a href="#">Document Management Page</a>.</li> <li>• <i>Purchasing Contracts</i>: This source transaction enables you to create authored documents that can reference and include purchasing contract information such as supplier name, maximum amounts, and items on the contract.</li> <li>• <i>Purchase Orders</i>: This source transaction enables you to create authored documents that can reference and include purchase order information such as supplier name, items and quantities on the PO.</li> <li>• <i>Sourcing Events</i>: This source transaction enables you to create authored documents that can reference and include sourcing event information such as payment terms, items, and bid factors.</li> </ul>

## Records

<i>Field or Control</i>	<i>Description</i>
<b>Record View</b>	Select the view from which the system gathers data and is used to resolve the bind in authored documents.
<b>Source Record</b>	Select a source record. Source records have been defined as source records within source transaction structure using the <a href="#">Source Transaction Structures Page</a> . Only records that are defined as source records are available to be selected. The source record is the base record for the record view fields.
<b>Level</b>	Displays the level in which the source record resides in the source transaction structure.
<b>Parent Record</b>	Displays the parent record that is associated with the source record. This is based on information in the source transaction structure. For example, the contract header record is considered a parent record for contract line records.

## Binds

<i>Field or Control</i>	<i>Description</i>
<b>Bind Variable</b>	Select a bind variable. Only transaction type variables are available. The system validates that a bind is not entered for more than one record or view.
<b>Field Name</b>	Select a field that the bind variable maps to in the record view. When documents are generated, the system replaces bind placeholders, in document elements, with the actual value that corresponds to this field name in the record view.
<b>Display Type</b>	Displays a list of display options if the field name is an XLAT (translate) field. These options allow you to indicate that you want to display the XLAT short name, XLAT long name, or the actual code in the authored document.  If you are using this bind in a rule, then the criteria always needs to use the code.

## Bind Definition Page

Use the Bind Definition page (CS\_BIND\_DEFINITION) to set up bind definitions.


Navigation:

**Supplier Contract > Manage Contract Library > Binds**

This example illustrates the fields and controls on the Bind Definition page.

**Bind Definition**

**Bind Variable** AGREEMENT\_NUMBER [Where Used](#)

**\*Description**  

**Bind Type** Wizard

**Field Type** String

**Field Length** 030

This page example displays a wizard bind type that uses a string field type. You can also select a field length and apply masking to the field value when it is used in a wizard question.

For additional information about bind variables, see [Understanding Bind Variables](#) at the beginning of this topic.

<b>Field or Control</b>	<b>Description</b>
<b>Bind Variable</b>	Enter the system identifier that you want to use for the bind if you are creating a bind variable. This value appears if you are maintaining or viewing the bind.
<b>Bind Type</b>	Select how to use the bind variable. Depending on the type of bind that you select, available field types will vary. Options are: <ul style="list-style-type: none"><li data-bbox="865 506 1466 617">• <i>Transactional</i>: Select to use the bind with data values that come from source transactions. The system uses values from a source transaction to replace the variable that you define.</li><li data-bbox="865 646 1466 730">• <i>Wizard</i>: Select to use this bind with a wizard. When the system processes a wizard bind, it replaces the variables with default values that are user-defined.</li></ul>

<b>Field or Control</b>	<b>Description</b>
<b>Field Type</b>	<p>Select an option that determines the method in which the intended data is stored in the field. Options are:</p> <ul style="list-style-type: none"> <li> <p><i>Checkbox</i>: Select to create a check box within a question group.</p> <p>Check box binds allow you to set up multiple yes or no options as answers to wizard questions. For example, you can use a series of check boxes to group questions that determines the content (clauses) that should appear in an authored document. There are rules that evaluate each check box bind variable to determine whether a clause should appear when the wizard is invoked.</p> <p>The check box has two values (Y or N) and is available only for wizard-type binds. The default value is N, and only the Y value controls wizard navigation. After a check box bind is used in an authored document, you cannot change it.</p> <p>The wizard combines check box questions until it encounters a non-check box bind field type. The system uses a blue separator line to combine questions. The check box bind is most useful when enabling users to quickly select multiple options in a related group.</p> </li> <li> <p><i>Date</i>: Select to use a date in the document when the system resolves the bind. For example, if you are using a transaction bind, you can use this bind type to include the contract end date in the authored document.</p> </li> <li> <p><i>Date/Time</i>: Select to use a date and time in the authored document when the system resolves the bind.</p> </li> <li> <p><i>Decimal</i>: Select to use a decimal to represent the contract value.</p> <p>When you select this option, the system displays these options:</p> <ul style="list-style-type: none"> <li> <p><b>Currency Code</b>: Select this check box to indicate that you want to use the decimal positions for the currency code associated with the source transaction that uses the bind variable.</p> <p>This check box is not available for wizard bind types.</p> </li> <li> <p><b>Number of Decimals</b>: indicate the number of decimal positions for transactional and wizard type binds.</p> <p>The system provides an example of the decimal placement.</p> </li> </ul> </li> <li> <p><i>Integer</i>: Select to use an integer to represent the contract value.</p> </li> <li> <p><i>Prompt Table</i>: Select to enable the use of prompt tables on a bind variable by specifying a predefined table that</p> </li> </ul>

<b>Field or Control</b>	<b>Description</b>
	<p>can be assigned to a specific bind and then accessed from the wizard.</p> <p>Prompt tables provide a list of values from which a document author can select when responding to wizard questions. This is an alternative to creating a list of valid values for specific fields that already have values in the database. Prompt table values are limited to basic codes and do not support multiple key-structured views or tables, such as supplier or item information. After the system stores the value in the bind, you can use the prompt in rules just like any other variable.</p> <p>When you select this option, the <b>Prompt Table</b> field is available. This field is defined later in this table.</p> <ul style="list-style-type: none"> <li>• <i>String</i>: Select to use a text string to represent the value.</li> </ul> <p>When you select this value, the <b>Field Length</b> field appears. String wizard bind variables enable additional mask edits.</p> <p>A mask defines the number of characters allowed when entering a value and how the system organizes the data. Creating a mask for a bind variable that is associated with a wizard ensures that when you enter a response to the wizard, that you enter the data in the proper format. Masks ensure that numeric values and alphabetic characters are used where they are required, and that any special constants are included. When you define a mask for a bind variable, the system displays an example of how the mask will be used in the wizard. You use masks when you have information that is critical to a document and must follow a specific format to be meaningful. For example, a phone number or a special type of identification number, such as a government regulation number or other pre-formatted ID.</p> <p>When you enter information using a wizard, you can enter the data including the mask, or you can enter the data and let the system format it to the mask. A mask can have three substitution characters. These characters serve as placeholders for the actual values that are to be entered when the wizard is invoked. Substitution characters include:</p> <ul style="list-style-type: none"> <li>• <i>A</i> - alpha character</li> <li>• <i>9</i> - number</li> <li>• <i>@</i> - any character</li> </ul> <p>Other characters used in the format are considered by the system as constants. A mask must have at least one substitution character to be valid. When you associate a mask with a string bind variable, the masked value cannot exceed the field length defined in the <b>Field Length</b> field. Only field lengths of 30 or less can contain masks. The value plus the mask</p>

<b>Field or Control</b>	<b>Description</b>
	<p>characters must be less than or equal to the field length value.</p> <p>Long characters enable you to use a wizard to add paragraphs of more than 254 characters of text to authored documents. For example, you could add an ad hoc clause that does not exist in the system, is specific to the contract being constructed, and is not intended to be reused. You define the bind setting using the <i>Long Char</i> value in the <b>Field Length</b> field. You can define navigation only for questions that use a long-character field length. Long-character bind variables cannot be used within a rule.</p> <p>When you run a wizard that uses a long-character question, the system provides an input field. Formatting is limited to what PeopleTools allows for a long edit box. To include paragraphs in the information, press the <b>Enter</b> button on the keyboard.</p> <ul style="list-style-type: none"> <li>• <i>Yes/No</i>: Select to use a yes or no variable to determine the value for a document. If you are using wizards, this is a yes or no response to a question.</li> </ul>
<b>Currency Code</b>	<p>Select to indicate that the system should access the appropriate currency code from the source transaction to retrieve the decimal precision tied to the specific currency for the transaction. This check box becomes available when you select to use a decimal field type for transactional binds. If you select to use currency transactional binds, the system does not use the value in the <b>Decimal</b> field.</p>
<b>Number of Decimals</b>	<p>Enter the decimal places that you want to use for decimal values in transaction and wizard binds. You use decimal places for numbers and can assign up to eight positions. When an author enters a value using the wizard, the system validates that the value entered is numeric. When a document is generated, the system reformats the precision based on the value entered in this field.</p> <p>The system truncates numeric values to the precision specified for wizard and transaction decimals. You can change the decimal precision when the bind variable is used, but the change is not reflected in existing documents unless you regenerate those documents.</p>
<b>Display Format</b>	<p>Select the format that you want the system to use when it displays date and time information. This option is used when you select either the <i>Date</i> or <i>Date/Time</i> in the <b>Field Type</b> field. For example, if you use a date and time field type, you can display the date and time as 31/12/2005 at 11:59 PM, or as December 31, 2005 at 11:59 PM.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Field Length</b>	<p>Select the number of characters that determines the length of this field. This field is available when you select <i>String</i> in the <b>Field Type</b> field. You can limit the field length to 2, 5, 12, 30, or 254 characters. If you are using a wizard bind, you can apply a mask using the <b>String Format</b> field. This field appears when you select a string character length between 2 and 30.</p> <p>Select <i>Long Char</i> to use long-character binds. This selection enables you to add large paragraphs to an ad hoc or a source transaction document through the wizard.</p>
<b>Prompt Table</b>	<p>Select a prompt table to be used with this bind variable. This field appears when you create a wizard bind and select <i>Prompt Table</i> in the <b>Field Type</b> field. These are predefined tables that you can assign to a specific bind and then access from a wizard. Prompt tables are primarily used when generating ad hoc documents where some values cannot be determined from the source transaction. Using a prompt table requires document authors to select a value that exists in the prompt table.</p> <p>PeopleSoft Supplier Contract Management provides prompt tables for currency codes, countries, buyers, Canadian provinces, and U.S. states. Prompt tables are available only in the base language. You cannot assign valid values for prompt tables or navigation for prompt values. Prompt values always go to the next question if one exists.</p>
<b>String Format</b>	<p>Enter a value that serves as a mask for the format that you want to use. This option is only used with wizard binds.</p> <p>Masking enables you to enter a specified format using special characters. When a bind is resolved within a document, it is formatted correctly as opposed to typing a specific value such as <i>1,000,000 USD</i>. You can enter currency formats for numerics and specify currency symbols, phone numbers, Social Security numbers, or other special character formats. You can also specify the number of decimal places for a number. You can use masks for string variables that has a length that is less than 30 characters and that has a mask value specified.</p>

## Setting Up Document Configurators

### Pages Used to Set Up Document Configurators

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Document Configurator Group Definition Page</u>	CS_TEMPLATE_GROUP	Define configurator groups.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Document Configurator Type Definition Page</a>	CS_TMPL_TYPE	Define configurator types.
<a href="#">Document Configurator Definition Page</a>	CS_TMPL_TBL	Define basic configurator information, view and maintain configurator structures, validate document configurators, and preview document configurators.
<a href="#">Select and Add Clauses or Sections to Document Configurator Page</a>	CS_CONTENTS_SEARCH	Add multiple elements, at the same time, to document configurators.
<a href="#">Insert a Content Row Page</a>	CS_TMPL_ADD_SEC	Add individual elements to document configurators.
<a href="#">Associate to Configurator Groups Page</a>	CS_TMPL_ASSOC_GRP	Associate document configurators with configurator groups.

## Understanding Document Configurators

A document configurator is a collection of sections and clauses from your library, ad hoc clauses, and rules that compose the overall structure of a document. You create a configurator after you define sections, clauses, and rules, and place them in the order that you want within each configurator. When you generate a document, the configurator determines the content, order of the document elements, and provides a static and dynamic structure within the document. A document configurator can also be related to a wizard that prompts for specific values that can be used by sections, clauses, and rules within the configurator.

An ad hoc clause, is content that you add to a document configurator as you are creating the configuration definition. The system doesn't manage ad hoc clauses the same as clause content in the contract library. It associates the clause with only a single configurator.

Document configurators are not version controlled or effective-dated. However, they are dynamic because you can introduce changes over time. Changes can include new sections, clauses, or rules. You can define configurators to be used with all source transactions.

You can create configurators to be used only with amendments and include an amendment placeholder section in the amendment - document configurator. This functionality is only available when the *Amend Contract with Amendments* option is selected on the [Create an Amended Version Page](#). The system includes the compare results between the last executed authored document and recent edits to the primary amended document. The system determines changes to authored documents by using Microsoft Word to compare the current document to the last created or executed document. Changes identified by Microsoft Word comparisons include the additions, changes, and deletions of text within the amendment file. The location where you place the amendment placeholder section in the amendment configurator determines where the comparisons appear in the document.



You can also create configurators that use multiple source types so that you can copy an authored document from one transaction source to a document for another source, such as copying an ad hoc document to create a purchase order document.

When using the Refresh button on the [Document Configurator Definition Page](#), you can the system shows the elements that were in effect as of the View As Of Date. The Preview Document button enables you to preview how the configurator content appears as of that same date. Therefore, a document configurator is basically a set of pointers that point to content in the library, and it is ultimately the start date for the source transaction that determines which version of the content is included when you generate a document.

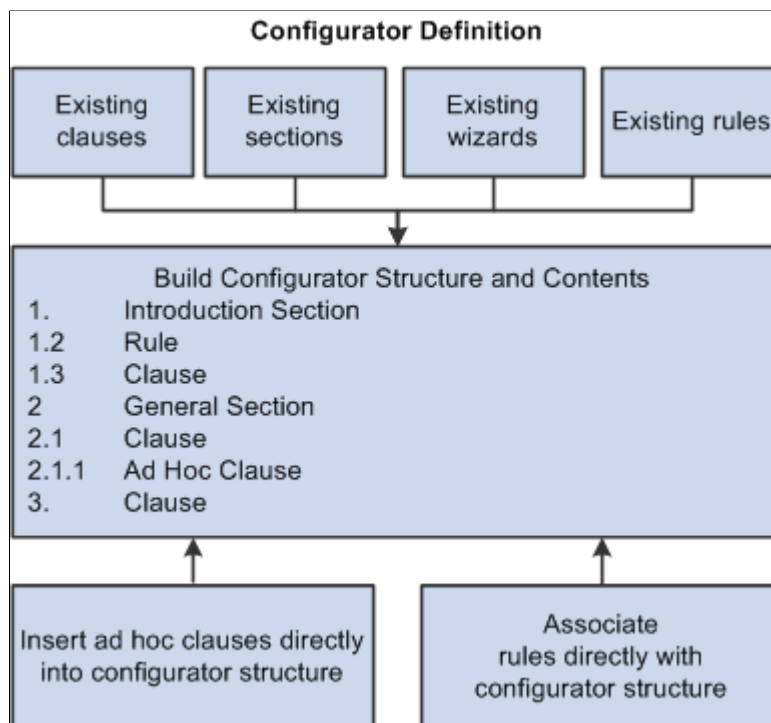
Depending on the requirements of your organization, you can create several configurators that are more static in nature, or create fewer configurators that are more rules-based and that dynamically pull information depending on the rules that are implemented. When creating a new document configurator, the Copy From configurator feature enables you to set up a baseline configurator and create other configurators from it. You can also categorize configurators using configurator types and groups.

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**Note:** You can create document configurators using the [Document Configurator Definition Page](#) or by creating a configurator when importing clause and section objects using the [Import Clauses/Sections Page](#). When you create a configurator using the Import Clauses/Sections page, you can apply the structure and content of a legacy document and automatically create the configurator.

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This diagram illustrates how elements of the contract library are brought together and organized in a configurator, and how ad hoc clauses and rules can be added within the configurator:



A document configurator references a Microsoft Word template that plays a major role in the format and style that the system applies to a generated document. You define templates for use with a configurator using the [Define Document Templates and Styles Page](#) and the [Document Format and Options Page](#). The setup on these two pages determine the overall Microsoft Word paragraph style names to apply from the Microsoft Word template when the system generates the document. For example, if you are

using all numbered sections and clauses, with title and body text, the system retrieves the style name that is associated with the **Numbered Title Style** and **Body Style Under Numbered Title** fields from the Microsoft Word template. The system then applies the styles to all sections and clauses that are included in the configurator when a document is generated.

**Note:** The system applies paragraph styles for clause or section content that does not have an explicit override paragraph style or list defined.

You build configurators as a logical grouping of elements to create a final document from the first to last page, including a table of contents. You do this by inserting references to section, clause, and rule elements in the clause library and by adding specific ad hoc clauses for the configurator. After you define the configurator, you can manage elements by indenting and out-denting, or deleting and reinserting the elements. Changing the indentation level of elements within the configurator can also affect the indentation within the generated Microsoft Word document, depending on how you have defined indentation for each outline level within the Microsoft Word template.

This example illustrates how elements can appear in a configurator. The outline positions and content type determine the contents and structure of a configurator that appear in the next **Content Elements** grid box.

Outline Position	Content Type	Content ID	Content Description						
1	Section	S_INTRO01	Procurement Contract Introduction Section		+	+	-	✂	🗑
2	Clause	CL_PRODESC01	Product Description	⇨	+	+	-	✂	🗑
3	Clause	CL_TERM01	Term of Contract	⇨	+	+	-	✂	🗑
4	Clause	CL_PERFMSTD01	Performance Std Clause	ℹ	+	+	-	✂	🗑
5	Clause	CL_DIRISLOS01	Delivery, Risk and Loss Clause	⇨	+	+	-	✂	🗑
6	Rule	INSPECTION_REQUIRED	Inspection Required	⇨	+	+	-	✂	🗑
7	Rule	PRODUCT_WARRANTY	Product Warranty Required	ℹ	+	+	-	✂	🗑
8	Section	S_HDR_AGREEMENTS	Contract Header Level Agreements (Repeating)	ℹ	+	+	-	✂	🗑
8.1	Section	SLA-HDR-PLACEHOLDER	SLA Placeholder for Header SLA Clauses						
9	Section	S_TERMINATE01	Standard Termination Section	ℹ	+	+	-	✂	🗑
9.1	Clause	CL_TERMINATE01	Terminate for Breach						
9.2	Clause	CL_TERMINATE02	Immediate Termination						
9.3	Rule	NOCUSTOMPRODUCTS	Include Terminate Clause if only non-custom products exist						
9.4	Rule	CUSTOMPRODUCTS	Include Terminate Clause if custom products exist						
10	Section	S_PRODUCTS01	Products and Services	⇨	+	+	-	✂	🗑

You can expand and collapse configurator elements and view up to nine levels. Two levels appear in the example. For maintenance purposes, the system automatically defines the outline numbering for the configurator element as you maintain the configurator.

## Understanding Document Configurator Groups and Types

Configurator groups and types are used to organize document configurator information. While the system does not use the groups and types for validation purposes, you can use them for information and search purposes.

- Configurator Groups are used to group document configurators for organizational needs. When you display a group, you can view individual document configurators that are contained in the group and

that relate to the overall use of the configurator. For example, if you have documents for a class of items, you can associate the configurators that are used for those documents into one group. You can also group configurators that specify certain contractual requirements. After you define a group, you can add individual configurator IDs to it.

- Configurator Types are used to define requirements that you can use in document configurators. These requirements provide instructions and specific details about a transaction type. When you create a document configurator, you can optionally use a transaction configurator type to reference information for the configurator.

## Document Configurator Group Definition Page

Use the Document Configurator Group Definition page (CS\_TEMPLATE\_GROUP) to define configurator groups.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Document Configurator Groups**

Use this page to create a group of configurators that you can use when authoring documents. Define the group name, and then use the **Configurator ID** field to select document configurators for the group.

## Document Configurator Type Definition Page

Use the Document Configurator Type Definition page (CS\_TMPL\_TYPE) to define configurator types.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Document Configurator Types**

Use this page to define the requirements for a specific type of document configurator. For example, you can indicate that the document should specify items and pricing on the contract document or indicate how delivery orders should be addressed in the document.

## Document Configurator Definition Page

Use the Document Configurator Definition page (CS\_TMPL\_TBL) to define basic configurator information, view and maintain configurator structures, validate document configurators, and preview document configurators.

Navigation:

**Supplier Contracts > Manage Contract Library > Document Configurators**

This example illustrates the fields and controls on the Document Configurator Definition page: Basic Info tab (1 of 2).

The screenshot shows the 'Document Configurator Definition' page with the following fields and controls:

- SetID:** SHARE
- Source:** Purchasing Contracts
- Configurator ID:** PURCHASES\_STD
- Where Used:** (empty)
- 'Availability Status':** Available
- Configurator Type:** Standard Fixed Priced Contract
- Wizard ID:** PURCHASES\_STD\_01
- 'Word Template Name':** STDTEMPLATE\_HF\_2007.XML
- Logging:** Log Warnings and Wizard
- 'Description':** Standard document for most Product Purchases
- Notes:** This is the standard document configurator for most supplier related product and service contracts
- Associate to Configurator Groups:**
  - Use for Amendments
  - Use for Executive Summary
  - Include Table of Contents If Available
- Buttons:** Refresh (Retrieve last saved configurator.), View As Of Date (03/05/2013), Preview Document, Save
- 'View Outline to Level':** 9

This example illustrates the fields and controls on the Document Configurator Definition page: Basic Info tab (2 of 2).

The screenshot shows the 'Content Elements' table with the following data:

Outline Position	Content Type	Content ID	Content Description						
1	Section	S_INTRO01	Procurement Contract Introduction Section						
2	Clause	CL_PRODDDESC01	Product Description						
3	Clause	CL_TERM01	Term of Contract						
4	Clause	CL_PERFMSTD01	Performance Std Clause						
5	Clause	CL_DIRISLOS01	Delivery, Risk and Loss Clause						
6	Rule	INSPECTION_REQUIRED	Inspection Required						
7	Rule	PRODUCT_WARRANTY	Product Warranty Required						
8	Section	S_HDR_AGREEMENTS	Contract Header Level Agreements (Repeating)						
8.1	Section	SLA-HDR-PLACEHOLDER	SLA Placeholder for Header SLA Clauses						
9	Section	S_TERMINATE01	Standard Termination Section						
9.1	Clause	CL_TERMINATE01	Terminate for Breach						
9.2	Clause	CL_TERMINATE02	Immediate Termination						
9.3	Rule	NOCUSTOMPRODUCTS	Include Terminate Clause if only non-custom products exist						
9.4	Rule	CUSTOMPRODUCTS	Include Terminate Clause if custom products exist						
10	Section	S_PRODUCTS01	Products and Services						

Use this page to build a collection of sections, clauses, and rules that make up the overall structure and wording of an authored document. When you generate a document, the configurator determines the content and the order of document elements and provides static and dynamic structure within the document.

**Note:** You can also develop and create a document configurator during the import of clauses and sections. See [Importing Clauses and Sections](#).

<b>Field or Control</b>	<b>Description</b>
<b>Copy From</b>	Click to access the Copy Document Configurator From page. The button is available when you are adding a configurator and enables you to copy an existing document configurator to create a new configurator. When you click the button, the system provides a list of existing document configurators.
<b>Availability Status</b>	<p>Select a status for the configurator.</p> <p>Values are:</p> <ul style="list-style-type: none"> <li>• <i>Available</i>: Select to indicate that the document configurator is available to be used. If the configurator is not available, you cannot use it as a template when creating documents. Make sure that you save the configurator to activate the status.</li> <li>• <i>In Progress</i>: Select to remove the configurator from general use. Use this option if you are redefining configurator values. This is the default value when you initially create a configurator. The configurator remains in this status and cannot be used until you select <i>Available</i>.</li> <li>• <i>Obsolete</i>: Select to indicate that the configurator should not be used to create documents. The system does not remove or delete the configurator and prevents the configurator from being selected to create a document. However, you can change an obsolete configurator and to an <i>Available</i> status and use it again.</li> </ul> <p>This field is disabled if you do not have the authority to update configurator status. You define the authority for changing a configurator status by using the <b>Change Configurator Status</b> check box on the "User Preferences - Supplier Contract Management Page" (Application Fundamentals).</p>
<b>Configurator ID</b>	Displays the configurator that you selected. If you are adding a configurator, enter a unique identifier.
<b>View As Of Date</b>	<p>Displays the clause, section, and rules content status as of this date. The system uses today's date as the default value.</p> <p>When you preview a document, the system selects content based on the date that you enter in this field. This functionality can be useful when determining what format and static approved content (rules are not exploded) would be included for authored documents that are generated as of this date.</p> <p>When you change this field, the system clears the details of the configurator until you refresh or preview the document again.</p> <p>The system also provides a warning if previous changes have not been saved.</p> <p>For additional information, see <a href="#">Understanding Document Configurators</a>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Source Transaction</b>	<p>Select the type of source transaction for which you want to use this configurator. You can select <i>Ad Hoc</i>, <i>Multiple Sources</i>, <i>Purchase Orders</i>, <i>Purchasing Contracts</i>, or <i>Sourcing Events</i>.</p> <p>The source transaction determines the templates that can be used for certain document types. For example, you can only generate an ad hoc document using an ad hoc configurator.</p> <p>The source transaction is also important to the configurator content because the content must match the configurator type. For example, an ad hoc configurator should not contain bind variables that are from a Purchasing Contract type because the system would not be able to resolve the binds during the generation process.</p> <p>The <i>Multiple Sources</i> option enables you to define a configurator that can be used for source transactions. After you add a configurator using multiple sources as the source transaction, you can use the Applicable Sources grid to select the source transactions that are allowed for the configurator.</p> <p>Transactional bind variables listed within a multi-source configurator must be valid for all sources. For example, you cannot place a bind variable for the purchasing contract ID directly on a multi-source configurator which is also used for purchase orders, because the purchase order document would not be able to resolve this bind. Rules can be useful in this scenario. You can use rules to evaluate the source transaction first, then depending on its source, when you create the document, the system includes additional content specific to the source that is being generated.</p> <hr/> <p><b>Note:</b> You can use wizard bind values in configurators for all source transactions.</p> <hr/>

<b>Field or Control</b>	<b>Description</b>
<b>Logging</b>	<p>Select how the system logs warnings when a document is generated. The system inserts a default value in this field based on the value in the <b>Log at Document Generation</b> field on the <a href="#">Installation Options - Supplier Contract Management Page</a>. You can override the value. Options include:</p> <ul style="list-style-type: none"> <li> <p><i>Details</i> Select to create a log that includes important warnings such as bind variables that were not resolved, a list of bind variables that are included in the document, resolved values, expansion of the document as exploded, and a detailed log to trace wizard responses.</p> <p>This option is useful when evaluating and debugging a new configurator that has wizards and rules.</p> <hr/> <p><b>Note:</b> Using the Details log takes more time to process when you are generating a document from a large and more complex configurator.</p> <hr/> </li> <li> <p><i>Log Warnings and Wizard</i> Select to log important warnings as well as an audit log of wizard responses when a document is generated.</p> <p>After placing a configurator into production, you should use this logging option for larger and more complex document configurators.</p> </li> </ul>
<b>Use for Amendments only</b>	<p>Select to indicate that this document configurator is to be used only for contract amendments. An amendment configurator is used and required only when you are creating separate amendment files as part of the amendment process.</p>
<b>Configurator Type</b>	<p>Select the type of configurator to which you want to link this configurator. Use configurator types to define the requirements that you can use in document configurators. Configurator types are created using the <a href="#">Document Configurator Type Definition Page</a>.</p>
<b>Use for Executive Summary</b>	<p>Select to use this document configurator as an overview of an authored document. An executive summary is a supplemental document that summarizes the document. You can use the document for executive review and approval. This check box is available when you are using document types. After selecting this check box and saving the configurator, you can select this configurator for use with a document type.</p> <p>When you create a document using this feature, the system provides executive summary buttons where you can add a related document that summarizes document information. When using the <a href="#">Document Management Page</a> you can view, edit, and refresh the summary. Executive summary documents are not version controlled, therefore, you can maintain only one current version of a summary.</p> <hr/> <p><b>Note:</b> The system does not log executive summary history.</p> <hr/>

<b>Field or Control</b>	<b>Description</b>
<b>Associate to Configurator Groups</b>	Select to access the Associate to Configurator Groups page, where you can link this configurator to a group. Use configurator groups to organize document configurators. When you display a configurator group, you can view individual document configurators that relate to the overall configurator use.
<b>Wizard ID</b>	<p>Select a document wizard to use with this configurator. Wizards are predefined sets of questions that assist you when formulating a document. The wizard that you associate with the configurator must resolve any wizard binds that are referenced within clauses, sections, or rules for this configurator. Generating trial documents and using various paths that you define in the wizard is the best way to identify problems with the wizard.</p> <hr/> <p><b>Note:</b> Although two types of wizards are available in PeopleSoft Supplier Contract Management, only document creation wizards are specified when you define a configurator. Configurator selector wizards are specified in the Document Types component to guide authors to the appropriate configurator.</p> <hr/>
<b>Word Template</b>	Select a Microsoft Word template on which to base this configurator. The Word template controls the overall formatting and styles of the document. The system provides a default value for this field based on the values on the <a href="#">Document Format and Options Page</a> .
<b>Include Table of Contents If Available</b>	Select to indicate that you want the configurator to build a table of contents within the document. The system can build the table of contents only if the Microsoft Word template has been set up to do so. If the table of contents is not defined for the Microsoft Word template, the system ignores the value that you enter in this field when you preview and generate the document. When a table of contents is available, the system includes it in the generated Microsoft Word document, after the introduction section, within the document. You must refresh the table of contents in the Microsoft Word document to generate or refresh the Microsoft Word version of the table of contents.
<b>Description</b>	Enter a value that describes this document configurator. The system displays the description along with the configurator ID and uses the <b>Description</b> field as a search option. This field is required.
<b>Notes</b>	Enter free-flow text for additional instructions or comments about the configurator. The text provides instructions to the document author about how the document configurator is used.



<b>Field or Control</b>	<b>Description</b>
<b>Refresh</b>	<p>Click to retrieve the last-saved document configurator content that used the value in the <b>View As Of Date</b> field. When you initially open the configurator, the <b>Content Element</b> grid does not appear with the configurator elements. When you click the <b>Refresh</b> button, the system displays the full document structure.</p> <hr/> <p><b>Note:</b> You must define and save the configurator before you can refresh it.</p> <hr/> <p>A Refresh does not save changes. If you have made changes to the configurator but not saved them, the system reminds you to save when you click the <b>Refresh</b> button.</p>
<b>Preview Document</b>	<p>Click to open a read-only version of the Microsoft Word document for a configurator. The system gathers the elements and builds them as they appear in the document configurator outline. The system uses the Microsoft Word template that is associated with the configurator to apply styles that are defined for content within the previewed document. This is similar to how it will appear for the generated version of the document. A Preview Document is not intended for editing. Instead, it provides a preview of the content that is included and based on the value in the <b>View As Of Date</b> field for the configurator.</p> <p>When you preview a document, the system highlights unapproved content from the configurator that is not controlled by rules. This content can include clauses and sections that may have not been approved but are listed directly on the configurator. The system uses the <b>View As Of Date</b> field value from which to base the approval. For example, pending clauses might appear during the preview, but the system could exclude their versions when a document is generated later, based on the same configurator and date. This functionality provides visibility into issues with the status of content approvals.</p> <p>Rules and their content are not exploded as part of a preview because they depend on bind values that are not resolved; however, a placeholder appears in the Microsoft Word preview document to show the relative positioning of the rule.</p> <p>When you click this button, the system attempts to show what you will see when you use this configurator to author a document. However, the system does not have specific source transactions and cannot substitute values for the binds. Therefore, instead of seeing a bind value, such as a purchase order number, you see the bind variable.</p> <p>The system displays repeating content, such as repeating clauses of sections, when it is in the document. Multiple instances of the content are not repeated within the Microsoft Word preview document.</p>

<b>Field or Control</b>	<b>Description</b>
<p><b>Save</b></p>	<p>Click to save and update the document configurator with the changes that have been made. The system validates all elements that are included in the configurator structure when you click this button. It also produces messages about problems with building the document. You must resolve all problems to successfully update and save a configurator.</p> <p>The validation routines check for conditions such as element placement, valid binds and rules, indent and outdent issues, and repeating clauses. For example, if you have used a title and introduction section in the middle of the document, the system displays an error message when you attempt to save the structure. Title sections must be at the beginning of a document. In this case, you could delete the section and reinsert it at the beginning of the structure.</p>
<p><b>View Outline to Level</b></p>	<p>Select the level at which you want to view the document outline. The document configurator controls the elements of a document. You use the <b>Content Elements</b> grid to populate the outline and the <b>Outline Position</b> column to view the levels of an outline. You can view up to nine levels.</p> <hr/> <p><b>Note:</b> Depending on the paragraph styles and outline number definitions that are defined for the Microsoft Word template, the configurator numbering scheme and indentation can be different in the actual Microsoft Word document. In addition, repeating sections and rules that the system resolves to be true and that include various content during document generation, will affect the Microsoft Word document numbering.</p> <hr/> <p>The following example shows how a document configurator outline might appear with four levels:</p> <pre> 1.   1.1     1.1.1       1.1.1.1     </pre> <p>If you limited the outline view level to two, the outline might look like this:</p> <pre> 1.   1.1   1.2   1.3 2.   2.1   2.2     </pre>

See [Insert a Content Row Page](#).

### Applicable Sources

Use this section to select one or more types of source transactions for which you want to use for this configurator. This section appears when *Multiple Sources* is selected in the **Source Transaction** field when adding a new document configurator.

Options are *Ad Hoc*, *Purchasing Contract*, *Purchase Order*, or *Sourcing Event*. The source transaction determines which templates can be used for each document type. For example, for a multiple source configurator, you can generate an ad hoc document using this configurator only when Ad Hoc is selected in this section. The source transaction is also important to the configurator content because the content must match the configurator type. For example, an ad hoc configurator should not contain bind variables that are Purchasing Contract types because the system would not resolve the binds during the generation process.

Transactional bind variables listed within a multi-source configurator must be valid for all sources. For example, you cannot place a bind variable for the purchasing contract ID directly on a multi-source configurator, which is also used for purchase orders, because a purchase order document would not resolve this bind. Rules can be useful in this scenario.

You can use rules to evaluate the source transaction of the document and include additional content that is specific to the source transaction used in that rule. For example, if the multi source configurator supports contract and purchase order documents, you can attach a rule that adds a clause that has contract-specific binds and then another rule that adds a similar clause but has corresponding binds for purchase order binds.

When you create a document and you search for a configurator, the system includes multiple source configurators that have the applicable source that matches the source transaction for the document you are creating.

When you save a configurator, the system validates the objects that you have linked to the configurator and the applicable sources that you selected. Therefore, you can only attach common clauses, sections, and rules to a multiple source configurator.

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**Note:** You can use wizard bind values in configurators for all source transactions.

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## Configurator History



Use this section to review historical information about the configurator. You can view who created the document configurator, when the configurator was created, whether the status has changed, and who has updated the configurator.


## Content Elements - Basic Info Tab

Use the Content Elements section to maintain and view details about the configurator structure. This structure represents a document. You can build a document configurator structure by clicking the insert buttons in the right side of the grid.

<b>Field or Control</b>	<b>Description</b>
<b>Outline Position</b>	<p>Displays a numbered position within the outline for a configurator element. The position indicates the order and level of indentation only. The system bases the final outline of the generated document on the style and format that is defined by the Microsoft Word template and the paragraph styles that you defined using setup pages. The style and format can be different from the configurator outline. The configurator outline provides a basic outline and a generated document applies the actual styles and formats.</p> <p>Bold characters in this column represent elements that have multiple subsections. You can collapse and expand these sections. The level to which the section appears is controlled by the value that you select in the <b>View Outline to Level</b> field.</p>
<b>Content Type</b>	<p>Displays the type of element that makes up this portion of the document configurator. Types can include sections, clauses, ad hoc clauses, or rules.</p> <p>An element is often embedded within another element. When you insert a section or clause containing dependent clauses, the system displays the child elements within the configurator. However, you cannot indent or outdent them separately because the rows are linked to the parent section or clause.</p> <p>You cannot insert elements within the structure of a predefined section or between a clause and its dependents from within the configurator. Instead, you must modify the section or parent clause. The system automatically reflects the change in the configurator.</p> <hr/> <p><b>Note:</b> You can include an amendment placeholder section in an amendment document configurator. The location where you place the amendment placeholder section in an amendment configurator determines where the system inserts the results of a comparison between the last executed contract and recent edits to the main amended document.</p> <hr/>
<b>Content ID</b>	<p>Displays the identifier for the configurator element.</p>
<b>Content Description</b>	<p>Displays the description of the element as a link. You can click the link to view and update the element. Only parent elements are available for maintenance. You can view and update child elements by opening the parent and accessing the child. You can access rules to view how bind variables are applied by the system when you run the wizard associated with the configurator.</p>

<b>Field or Control</b>	<b>Description</b>
	<p>Click the right arrow to move the configurator element up to the next higher level in the structure. The system adds the element and its children to the bottom of the previous level if the structure permits the move. Depending on the Microsoft Word template that is defined for the configurator and the paragraph styles, the outline numbering and indentation in the configurator can affect the format within the generated document. For additional information about formats and styles, see <a href="#">Setting Up Document Formats and Options</a> and <a href="#">Setting Up Document Templates and Styles</a>.</p> <p>If a clause is at level two, when you indent a row, the system moves the element to a level one following the last position in that level. If the last position is 1.4, then the element is added at the 1.5 level. The system also moves any children that are associated with the clause to a corresponding level. If the original level is two for the clause and 2.1 for the child, the system changes the level to 1.5 for the clause and 1.5.1 for its child.</p> <p>This example of the initial outline shows how the system indents according to the previous description:</p> <pre> 1 .   1 . 1   1 . 2 2 .   2 . 1   2 . 2                     </pre> <p>After you click the right arrow, the outline appears like this:</p> <pre> 1 .   1 . 1   1 . 2   1 . 3     1 . 3 . 1                     </pre> <p>After moving the element, the system changes the left arrow to a right arrow.</p>

<b>Field or Control</b>	<b>Description</b>
	<p>Click the left arrow to move the configurator element down to the next lower level in the structure. The system adds the element and its children as a continuation at the top of the next level if the structure permits the move.</p> <p>If a clause is at level two, when you outdent a row, the system moves the element to a level three in the first position at that level. It also moves any children that are associated with the clause to a corresponding level.</p> <p>After moving the element, the system hides the left arrow if the element can move no further to the left. You can indent to a maximum of nine levels.</p>
	<p>Select to review indentation information. A few cases occur in which the system doesn't permit the indentation of clauses or sections in the configurator. When this occurs, the system displays this button to describe the reason. Typically, you can limit content indentation if the content above it is dynamic and its ultimate indentation is a variable that the system cannot determine in the document configurator. The system restricts the indentation of an immediate row following this row.</p>
	<p>Click to access the <a href="#">Select and Add Clauses or Sections to Document Configurator Page</a> to add more than one section or clause</p>
	<p>Click to access the <a href="#">Insert a Content Row Page</a> to add a single ad hoc clause, clause, rule, or section.</p>
	<p>Click to remove a document element from the configurator. When you select to delete an element, the system does not copy it for future pasting and the deletion is immediate.</p>
	<p>Click to cut and copy an element. After cutting an element, you can click the <b>Paste</b> icon to insert the element below the row that you select. When you cut a content row, the system includes the parent element and all of its children. You can cut only one element at a time, and you must paste the element before you can cut another row. To delete a row, use the <b>Delete</b> button.</p>

<b>Field or Control</b>	<b>Description</b>
 <b>Paste Row After</b>	Click to paste a content element row. You must cut a row before you use the <b>Paste</b> icon. The content row and its children are pasted into the document below the row you select to paste the contents.

## Content Elements - Details Tab

Use this section to view the content format and the content title of content elements. The **Content Format** field displays how the system generates the content of the element. Field values are *Reference* and *Full*.

## Content Elements - More Details Tab

Use this section to view approval and content statuses for document configurator elements.

<b>Field or Control</b>	<b>Description</b>
<b>Approval Status</b>	Displays whether the content approval status is <i>Initial</i> , <i>Pending</i> , or <i>Approved</i> . The approval status for content is for the effective-dated clause or section. The system bases the effective-dated content on the <b>View As Of Date</b> field value.
<b>Content Status</b>	Determines whether the content status is <i>Active</i> or <i>Inactive</i> , and the content effective date.
<b>Level</b>	Displays the indentation level at which the element resides in the document. For example, a 2 means that the content element is a subsection of a parent element and a 3 means that the content element is a subsection of a subsection.
<b>Protect</b>	Displays an indication whether the content element is protected when the document is being edited. This option is defined on the Clause Definition page.

## Select and Add Clauses or Sections to Document Configurator Page

Use the Select and Add Clauses or Sections to Document Configurator page (CS\_CONTENTS\_SEARCH) to add multiple elements, at the same time, to document configurators.

Use the **Add Multiple Objects** button to insert more than one clause or section into the document configurator structure.

Navigation:

Click the **Add Multiple Objects** button on the Document Configurator Definition page.

Click the **Insert** button on the **Content Elements** grid on the Document Configurator Definition page.

This example illustrates the fields and controls on the Select and Add Clauses or Sections to Document Configurator page.

Use this page to search for and find multiple clauses or sections to add to the document configurator structure. You can add multiple clauses or sections at the same time, which facilitates organizing and building the structure.

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**Note:** The PeopleTools Search Framework must be enabled, and the search collections must be built and kept up to date for this page to contain the most accurate information.

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**Note:** When you are adding single elements, the system does not use the Search Framework.

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To insert multiple sections or clauses:

1. Use the **Content Type** field to select the content type for which you want to search.

You can add only multiple sections or clauses at the same time.

2. Use the **Title or Body Text** field to enter text to use for the search.

You can use the text search options to refine the search. Select the **Match Case**, **Exact Word**, and **Use Thesaurus** check boxes to refine the search.

3. Select or enter the clause attributes to use in the search.

The Clause Attributes section changes to Section Attributes when you select *Section* in the **Content Type** field.

4. Click the **Search** button.



The system displays the search results.

5. Select the elements to include in the configurator structure.

When you select the elements, the system orders them in the sequence that you select. Regardless of the numbering in the current configurator structure, the system adds these elements to the location in the structure from which you selected to insert additional elements.

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**Note:** When you use the Search Framework to select an element, the results grid is limited to a single page of returned information. If the system returns more than one page of search results, you must reenter the search criteria and select the next page in the sequence to select the element and add it to the document configurator. The **Chunk Size** field on the [Installation Options - Supplier Contract Management Page](#) controls the number of lines that are returned by a Search Framework search. Large chunk size values can result in performance issues.

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6. Click the **OK** button.

The system populates the structure with the selections.

## Insert a Content Row Page

Use the Insert a Content Row page (CS\_TMPL\_ADD\_SEC) to add single elements to document configurators.

Navigation:

Click the **Insert** button in the **Content Elements** grid on the Document Configurator Definition page.

This example illustrates the fields and controls on the Insert a Content Row page.

Use this page to insert a single section, clause, rule, or ad hoc clause to the document configurator structure. When you make the selection and click **OK** and the system loads the selection into the configurator structure. To add multiple clauses and sections at the same time, use the **Insert Multiple Objects** button.

Use the field to select one of these types to insert into the structure:

<b>Field or Control</b>	<b>Description</b>
<b>Content Type</b>	<p>Select an option:</p> <ul style="list-style-type: none"> <li>• <i>Ad Hoc Clause</i>: Select to insert ad hoc text that you can copy or compose immediately and that does not require approval as a clause would. <p>Ad hoc clauses do not support bind variables. When you select to insert an ad hoc clause, the system updates the <b>Content ID</b> field with a system-generated ID for the ad hoc clause. It also displays a page for you to enter title and full-text entries. You must enter a description and either a title or full-text information. After completing the text, you can edit the document using Microsoft Word. Select the <b>Numbered Clause</b> check box to indicate that the clause should be numbered.</p> </li> <li>• <i>Clause</i>: Select to add a single clause to the document configurator structure. <p>When you select to insert a clause, the system provides the <b>Content ID</b> field for you to perform a clause search. The system also provides the <b>Content Format</b> field for you to select the type of content format generation to use for the clause.</p> <p>Select <i>Reference</i> for the configurator structure to use a reference that indicates a line to which the clause applies or a reference document that describes conditions for the line.</p> <p>Select <b>Full</b> to use the full text of the clause.</p> <p>When you select a clause, the system expands its dependent clauses and displays them in the configurator. You can indent and outdent only the main clause itself, because the system processes clause dependents as one object within the configurator.</p> </li> <li>• <i>Rule</i>: Select to add a single, standard rule to the document configurator structure. <p>The system displays a search field for you to find a specific rule. Using standard rules within the configurators enables you to dynamically control the content of the configurator by including additional clauses, sections, or both in specific locations of the document. The rule can evaluate wizard or transactional bind variables and determine whether an additional clause should be included.</p> </li> <li>• <i>Section</i>: Select to add a single section to the document configurator structure. <p>The system displays a search field for you to find a section. When you select a section, the system expands the entire section structure and displays it within the document configurator. You can indent and outdent only the section header because the system processes the entire section as one object within the configurator.</p> </li> </ul>

## Associate to Configurator Groups Page

Use the Associate to Configurator Groups page (CS\_TMPL\_ASSOC\_GRP) to associate document configurators with configurator groups.

Navigation:

Click the **Associate to Configurator Groups** link on the Document Configurator Definition page.

Use this page to link a configurator to a configurator group. A group enables you to organize and search for configurators.

## Setting Up Document Types

To set up document types, use the Document Types (CS\_DOCUMENT\_TYPE) component.

### Page Used to Set Up Document Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Document Type Page</u>	CS_DOCUMENT_TYPE	Define document types.

## Understanding Document Types

Document types can help you organize and categorize documents that you use when authoring documents. Using document types, you can define specific settings, defaults, and security that can help fine-tune each type of document. For example, you can associate a specific configurator with a specific type of document to ensure that the right configuration is used when authors create documents.

The document type structure enables you to standardize life-cycle processing options and default values for all documents that are created for the specified type. For example, you can configure a formal document type to enable full life-cycle statuses and functions including executing the document and processing formal amendments. You can also configure other documents, such as a request document, with a Draft and Approved status option or, even a Draft and Completed status option.

By using document types, you can simplify the actions that you perform on particular documents such as allowing edits, collaboration, and digital signatures. In addition, you can enable user-defined fields and cycle-time properties for document types. These actions make it possible for each type of document to have its own set of specific and unique attributes.

You can use document types within the requisition flow for requisitions that require new contract documents. In this scenario, you can define a request document and wizard that captures additional information from the requestor. When a document type is set up for the contract document request situation, you can specify that the system use this type with a PeopleSoft eProcurement or Purchasing requisition. In this case, along with the requisition, the requestor can generate a supplemental request document by launching a wizard that captures the required information that pertains to the contract request. When you award the requisition to a contract, the specialist can reference the original request document and make use of wizard responses within the request document to drive the content and fill in required data for the actual contract. The benefit of this process is that by the time the contracting

specialist becomes involved in the process, the requestor has already provided all of the necessary information.

Other examples for using document types can include statements of work, document summaries, executive summaries, and nondisclosure agreements.

The use of document types requires that you select the **Use Document Type** check box on the [Installation Options - Supplier Contract Management Page](#)

Document type features include:

- Using the PeopleSoft Approval Framework to set up approvals for documents of a specific document type.
- Creating an authored document request for a requisition document.

When you use this feature, the system displays a **request document** link on the Maintain Requisitions page in PeopleSoft Purchasing and on the Create Requisition page in PeopleSoft eProcurement.

- Selecting a start sequence to create an ad hoc ID for ad hoc documents.
- Selecting the appropriate configurator by using document types.

When using document types, you can use the system to help you determine the appropriate configurator. You can select a configurator based on a specific configurator or a configurator selector wizard. A specific configurator always uses the same configurator for the document type. However, a wizard provides a set of questions for you to answer. Based on the answers, the system provides the appropriate configurator.

- Generating ad hoc documents automatically.

You use this feature to help streamline the process when documents are created. When you select this option, the system automatically generates a document based on all the default values specified for the document type. The system bypasses the Create Document page. Therefore, users who do not need to define document details to the level that a contract specialist might, can create a document using fewer steps. If a wizard is associated with a configurator, the system goes directly to the wizard questions after you enter document key information in add mode, which is the same as you would when adding documents from a requisition.

- Setting document type life-cycle statuses and for editing, collaboration, and electronic signatures.
- Setting cycle-time and workbench.
- Creating user-defined fields that define additional user-defined attributes that you can associate to a document.
- Setting up security for users who can create and view a type of document.

## Document Type Page

Use the Document Type page (CS\_DOCUMENT\_TYPE) to define document types.

Navigation:

**Supplier Contracts > Manage Contract Library > Document Types**

This example illustrates the fields and controls on the Document Type page (1 of 3).

### Document Type

SetID: SHARE

Document Type: PURCHASING      Source: Purchasing Contracts

\*Description:       \*Status:

Notes:  ✎

191 characters remaining

Internal Document       Log View Action in History  
 Allow using wizard responses from a prior document       Allow copying document from a different source

**▼ Determine Configurator Using**

Specific Configurator       Configurator Selector

\*Configurator ID:   Standard document for most Product Purchases

**▼ Life Cycle Options**

Enable Edit  
 Enable Internal Collaboration  
 Enable Signatures  
 Prior to Approvals  
 During Approvals  
 After Approvals  
 Enable External Collaboration

\*Applicable Statuses:

Amendment Configurator ID:   Amendment configurator for Purchasing Contract Transactions

Executive Summary Configurator:   Executive Summary for all Procurement Contracts

This example illustrates the fields and controls on the Document Type page (2 of 3).

**▼ Cycle Time Settings**

Enable Cycle Time  
 Business Calendar:   Standard Business Calendar  
 \*Complete When Status is:    
 Target Cycle Time per Document (days):   
 Target Cycle Time per Amendment (days):

<p><b>Status Indicators for Documents</b></p> <p>Red: Number of Days Prior to Due Date <input type="text" value="1"/></p> <p>Yellow: Number of Days Prior to Due Date <input type="text" value="2"/></p>	<p><b>Status Indicators for Amendments</b></p> <p>Red: Number of Days Prior to Due Date <input type="text" value="1"/></p> <p>Yellow: Number of Days Prior to Due Date <input type="text" value="2"/></p>
--	---

**▼ User Defined Fields**

Option for User Defined Fields:

This example illustrates the fields and controls on the Document Type page (3 of 3).

**Roles with Permission to Create Documents**

1-3 of 3

*Role Name	Description	Allow Override	Configurator ID		
App Developer	Application Developers	<input checked="" type="checkbox"/>		+	-
SAMPLE	SAMPLE ROLE	<input checked="" type="checkbox"/>		+	-
Supplier Contract Administrator	Sample - Supply Contract Admin	<input checked="" type="checkbox"/>		+	-

**Roles with View Access to Documents of this Type**

1-1 of 1

*Role Name	Description	Document View Access			
Supplier Contract Agree Update	Sample - Supplier Conctrct Agree	Apply Role		+	-

Document types provide a way to categorize documents. You can determine specific options, defaults, and security that can help fine-tune the use of each type of document. You can create document types, regardless of whether document types have been selected on the [Installation Options - Supplier Contract Management Page](#). However, the system does not apply them when a document is created unless the **Use Document Types** check box has been selected. After documents have been created using a document type, you cannot deselect the **Use Document Types** check box in installation options.

<b>Field or Control</b>	<b>Description</b>
<b>Document Type</b>	Enter a document type ID.
<b>Source</b>	<p>Select a source transaction. After the source is selected, you cannot change it.</p> <p>Available source transactions are:</p> <ul style="list-style-type: none"> <li>• <i>Ad Hoc</i>: Used to create stand-alone documents that are not associated with a specific source transaction.</li> <li>• <i>Purchase Orders</i>: Used to create authored documents based on purchase orders.</li> <li>• <i>Purchasing Contracts</i>: Used to create authored documents that can reference and include information from purchasing contract transactions.</li> <li>• <i>Sourcing Event</i>: Used to create authored documents that can reference and include information for sourcing event transactions.</li> </ul>
<b>Description</b>	Enter a brief description for this document type. This field is required. The description appears in the document type list of values for all pages.

<b>Field or Control</b>	<b>Description</b>
<b>Status</b>	<p>Select the status of the document type. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Available</i>: The document type can be used. This is the default value for the field.</li> <li>• <i>Obsolete</i>: The document type cannot be used. The system does not validate the status when you change it.</li> </ul> <hr/> <p><b>Note:</b> If a document type is available, you must provide users the authority to create documents using this document type using the <b>Roles with Permission to Create Documents</b> section.</p> <hr/>
<b>Copy From</b>	<p>Click to create a document type from an existing document type. You can only copy document types that have the same source transaction as the one you are creating. When you click this button, the system accesses the Copy Information From page where you can select a document type.</p>
<b>Delete</b>	<p>Click to delete a document type from the system. The button is only available if the document type is not being used with a document. The system provides a warning message before you can delete the document type. When you click <b>Yes</b>, the deletion is immediate.</p>
<b>Notes</b>	<p>Enter any additional information for the document type that could help clarify how or why it is used.</p>
<b>Start Sequence</b>	<p>Select a start sequence for this document type. A start sequence is an ID that links a series of documents for automatic numbering purposes. The sequences that are available on this page are the ones that have been added for the CS_ADHOC_ID field and Contract Ad Hoc ID number type for automatic numbering. The start sequence controls the prefix for numbering. This field is only available for Ad Hoc contract source documents.</p> <p>If a start sequence does not exist or the <b>Use Document Type</b> check box is not selected on the <a href="#">Installation Options - Supplier Contract Management Page</a>, then you can use the automatic numbering default value if one has been defined.</p> <hr/> <p><b>Note:</b> If you associate the same start sequence with different document types, the system uses the last sequence number across all document types that use the start sequence. This can cause gaps in sequencing for a document type. Therefore, if sequencing is important to document numbering, then create a unique start sequence that is intended to be used with a specific document type.</p> <hr/> <p>Numbering sequences are set up using the <a href="#">Auto Numbering Page</a>. You also use the feature to select the default start sequence.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Internal Document</b>	<p>Select to indicate that you want the document identified as an internal document. Internal documents are those that are attached to a document and are intended for internal use. External documents are intended to be dispatched to external contacts, such as collaborators or document approvers.</p> <p>If the source transaction is <i>Purchasing Contract</i>, the <b>Internal Document</b> check box is not available.</p> <hr/> <p><b>Note:</b> When the <b>Internal Document</b> check box is selected, the <i>Full Life Cycle Statuses</i> value is not available in the <b>Applicable Statuses</b> field. The applicable status values available are only <i>Draft/Complete</i> and <i>Draft/Approved</i>.</p>
<b>Allow using wizard responses from a prior document</b>	<p>Select to enable authors, who use this document type, to be able to copy wizard responses from a different document when creating a new document. The system provides a check box on the <u>Create Document Page</u> that authors can select when they want to use responses from another wizard. When an author selects to use responses from another wizard, the system provides a link to select the document that includes the wizard responses. After selecting and adding the responses to the current document, authors can change a wizard response.</p> <p>When you select this check box, the <b>Allow copying document from a different source</b> check box is not available.</p> <p>If you select to have the system automatically create a document, you cannot use wizard responses in another document.</p>
<b>Use Only with PO Requisitions</b> (use only with purchase order requisitions)	<p>Select to indicate that this document type is a request type of document that is to be used with purchase order requisitions. Documents created from this type must be associated with a requisition ID and business unit. This field is available only when the source is ad hoc.</p> <p>When you used this check box, requestors can define a related document and wizard that captures additional information. When a document type is set up for the document request, you specify that the system use this type with a PeopleSoft eProcurement or Purchasing requisition. In this case, along with the requisition, the requestor can generate a supplemental request document by launching a wizard that captures needed information pertaining to the contract request. The requestor can then provide the required information in the supporting document. When you award the requisition to a document, the specialist can reference the original request document and use wizard responses within that request document. This helps drive the content and complete required data on the actual document.</p> <p>This field is determined from the <b>Use with PO Requisition</b> check box on the <u>Installation Options - Supplier Contract Management Page</u>.</p>



<i>Field or Control</i>	<i>Description</i>
<b>Automatic Document Creation</b>	Select to have the system automatically create a document using all the field values on this page when you click the <b>Add a Document</b> button from the <a href="#">Add a Document Page</a> . This option enables you to bypass the <a href="#">Create Document Page</a> , where you would normally review and change the defaults before creating the actual document. The system determines whether the configurator selector wizard should be invoked when a document is added on the <a href="#">Document Management Page</a> . The system uses the next number in the starting sequence to create the document. This check box is available only for ad hoc document types.
<b>Log View Action in History</b>	Select to indicate that action history can be viewed in the document history. History provides an audit trail of who accessed the main document and amendment files. When you click the <b>View</b> button, the system records the action in the history. The history is logged when a document is viewed internally and externally.  <b>Note:</b> View Actions from Contract Workbench are not logged regardless of this control setting.
<b>Allow copying document from a different source</b>	Select to allow the system to copy documents that use different transaction sources. For example, if this document transaction source type is ad hoc , then you can copy a document that uses a purchase order transaction source type to create a document.  To use multiple sources, you must first define a document configurator that can be used with multiple source types, and then use that configurator as the configurator ID for a document type.  When you select this check box, the <b>Allow using wizard responses from a prior document</b> check box is not available.

## Determine Configurator Using

Use this section to define how the system selects a document configurator when you generate a document using this document type. See [Creating Authored Documents](#).

<i>Field or Control</i>	<i>Description</i>
<b>Specific Configurator</b>	Select to indicate that you want to use a specific configurator ID with this document type. Select the configurator using the <b>Configurator ID</b> field. When you create a document using this document type, the system uses the configurator that you select in the <b>Configurator ID</b> field on the <a href="#">Create Document Page</a> .

<b>Field or Control</b>	<b>Description</b>
<b>Configurator Selector</b>	<p>Select to use a special configurator selector wizard to determine which document configurator to use with this document type. Select the configurator selector wizard using the <b>Wizard ID</b> field. When you select the document type on the <a href="#">Add a Document Page</a>, and click the <b>Add a Document</b> button, the system launches the configurator selector wizard.</p> <p>After you answer wizard questions, the system selects the appropriate configurator and the <a href="#">Create Document Page</a> appears. Then, you can run the configurator selector wizard again, or select another document type to create the document.</p>
<b>Configurator ID</b>	<p>Select a document configurator. This field is available when you select <b>Specific Configurator</b>. When you create a document using this document type, the system uses this specific configurator to generate the document. A configurator and a document type must use the same source type.</p>
<b>Wizard ID</b>	<p>Select a configurator selector wizard to use with this document type. The field is available when you select the <b>Configurator Selector</b> radio button. When you create a document, the system uses this wizard and its questions to help you select the appropriate configurator to use when generating a document.</p> <p>Only wizards that have been defined as configurator selector wizards are available. Document types do not use document creation wizards.</p>

## Life Cycle Options

Use this section to define life-cycle options for a document type. You can control some of the statuses and buttons that appear on the [Document Management Page](#) when you use this document type to create a document. These options help you streamline the life-cycle flow for this type of document. Available options in this section also depend on options selected on the [Installation Options - Supplier Contract Management Page](#). For example, if you do not select to use external collaboration as an installation option, the **External Collaboration** check box is not available.

<b>Field or Control</b>	<b>Description</b>
<b>Enable Edit</b>	<p>Select to control edit settings on the Document Management page when you create this type of document. When you select this option, the <b>Enable Internal Collaboration</b> and <b>Enable External Collaboration</b> check boxes become available.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Enable Internal Collaboration</b>	<p>Select to control internal collaboration settings on the Document Management page when you create this type of document. This option enables you to process documents of this type through a collaboration cycle.</p> <p>This check box remains inactive until you select the <b>Enable Edit</b> check box.</p> <p>See Document Collaboration for Internal Users in the <a href="#">Understanding Document Collaboration</a> topic.</p>
<b>Enable Signatures</b>	<p>Select this option to enable digital signatures.</p> <p>Enable signatures must be selected on the Installation Options - Supplier Contract Management Page for this option to be available. When you select this option, three additional check boxes become available to indicate when signatures should be captured within the life cycle for this type of document: <i>Prior to Approvals</i>, <i>During Approvals</i>, and <i>After Approvals</i>. You can route documents for signatures, as standalone documents, or as part of the formal approval process.</p>
<b>Prior to Approvals</b>	<p>Select to indicate that signatures should be captured prior to submitting a document through the approval process. The system provides the Route for Signature button for the document specialist to route the document for signatures.</p> <p>The Route for Signature button is not used for the Adobe Document Cloud eSign services or DocuSign signature methods. The routing is performed by the <i>Prepare and Route for e-Signature</i> button.</p> <p>This option becomes available when you select the <b>Enable Internal Signatures</b> option.</p>
<b>During Approvals</b>	<p>Select to indicate that signatures should be captured during the approval process. As the document is routed using the Approval Framework, approvers sign the document as they approve it.</p> <p>This option becomes available when you select the <b>Enable Internal Signatures</b> option.</p> <hr/> <p><b>Note:</b> This option does not apply when using the Adobe Document Cloud eSign services or DocuSign signature methods.</p> <hr/>

<b>Field or Control</b>	<b>Description</b>
<b>After Approvals</b>	<p>Select to indicate that signatures should be captured after the approval process. The system provides the <b>Route for Signature</b> button for the document specialist to route the document for signatures after the document has been approved.</p> <p>The Route for Signature button is not used for the Adobe Document Cloud eSign services or DocuSign signature methods. The routing is performed by the <i>Prepare and Route for e-Signature</i> button.</p> <p>This check box becomes available when you select the <b>Enable Internal Signatures</b> option.</p>
<b>Enable External Collaboration</b>	<p>Select to control external collaboration settings on the Document Management page when you create this type of document. This option enables a supplier to review the document online using the Supplier Portal. External collaboration must be enabled on the <a href="#">Installation Options - Supplier Contract Management Page</a> for this check box to be available.</p> <p>See Document Collaboration for External Users in the <a href="#">Understanding Document Collaboration</a>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Applicable Statuses</b>	<p>Select the grouping of statuses that you want to use to process the document through its life cycle. For ad hoc document types, the <i>Draft, Approve Statuses Only</i> value is the default value and can be changed.</p> <p>For purchasing contract types, the <i>Full Life Cycle Statuses</i> value is the default value and cannot be changed.</p> <p>Options are:</p> <ul style="list-style-type: none"> <li>• <i>Draft, Approve Statuses Only</i>: Select to indicate that the status options on the <a href="#">Document Management Page</a> are <i>Draft</i> or <i>Approve</i>.</li> <li>• <i>Draft, Complete Statuses Only</i>: Select to indicate that the status options on the Document Management page are <i>Draft</i> or <i>Complete</i>.</li> <li>• <i>Full Life Cycle Statuses</i>: Select to use all life-cycle statuses on the Document Management page. This value is the default value when the source is purchasing contract.</li> </ul> <hr/> <p><b>Note:</b> After you create a document using this document type, you cannot change the applicable statuses.</p>
<b>Amendment Configurator ID</b>	<p>Enter the amendment configurator that you want to use when creating amendments for documents of this type. Only configurators with the <b>Use for Amendments only</b> check box selected on the <a href="#">Document Configurator Definition Page</a> appear in the list of values. The source transaction on the Document Configurator Definition page must also match the source that is defined for this document type.</p> <hr/> <p><b>Note:</b> This field is inactive until you select the <i>Full Life Cycle Statuses</i> value in the <b>Applicable Statuses</b> field.</p>
<b>Executive Summary Configurator</b>	<p>Select a configurator for use with an executive summary document. These are configurators that have been created specifically for executive summaries. This is a supplemental document that summarizes a document.</p> <p>When creating a document using a document type that uses an executive summary configurator, the system generates the document with executive summary attributes. When you access the <a href="#">Document Management Page</a>, you can create, view, and edit executive summary documents.</p>

## Cycle Time Settings

Use this section to define the cycle time options for a specific document type. For example, you can ensure that document requirements are achieved in a timely manner by establishing a time frame. These settings are initially defined on the Installation Options page, but you can override them on this page. After defining the settings, you can then use the Find Existing Documents page to determine which documents are overdue or close to being late.

<b>Field or Control</b>	<b>Description</b>
<b>Enable Cycle Times</b>	Select to indicate that cycle times are enabled for this document type. When you select the check box, you can edit the remaining fields in this section.
<b>Business Calendar</b>	Select a business calendar to use for document and amendment cycle times. The business calendar is used to determine what days, such as holidays or weekends, should be removed from cycle-time calculations.
<b>Complete when Status is</b>	<p>Select a status that indicates when the system should stop tracking the cycle time of a document. For example, you can track document cycles during critical stages when numerous reviewers or approvers are involved in the cycle and not track it for its entire review cycle; or, the organization might want to track a critical document from the beginning to when it is executed.</p> <p>You can end document and amendment cycle tracking when a document reaches a status of:</p> <ul style="list-style-type: none"> <li>• <i>Approved</i></li> <li>• <i>Dispatched</i></li> <li>• <i>Executed/Complete</i></li> <li>• <i>Pending Approval</i></li> </ul>
<b>Target Cycle Time per Document (days)</b>	Enter the target number of days that a document should take to be completed.
<b>Target Cycle Time per Amendment (days)</b>	Enter the target number of days that an amendment should take to be completed.
<b>Red: Number of Days Prior to Due Date</b>	Enter the number of days prior to the due date that you want to populate the workbench with a red flag indicator. When a document falls within the number of days that you enter, the system inserts a red flag indicator on the search results for the Find an Existing Document page.

<b>Field or Control</b>	<b>Description</b>
<b>Yellow: Number of Days Prior to Due Date</b>	Enter the number of days prior to the due date that you want to populate the workbench with a yellow flag indicator.

## User Defined Fields

Use this section to indicate that you want to use the user-defined fields that have been enabled on the [User Defined Fields Page](#) for this document type.

<b>Field or Control</b>	<b>Description</b>
<b>Option for User Defined Fields</b>	<p>Select an option that indicates how you want to apply user-defined field for the document type. Options are:</p> <ul style="list-style-type: none"> <li>• <i>All User Defined Fields</i>: Select to use all the user-defined fields that have been enabled at the installation level.</li> </ul> <p>This option keeps this document type synchronized with the PeopleSoft Supplier Contract Management installation-wide settings for user-defined fields. You do not have to maintain the fields for a document type because the system automatically updates them. When you select this option, the system does not display the default values.</p> <ul style="list-style-type: none"> <li>• <i>No User Defined Fields</i>: Select to not include user-defined fields with this document type. This is the default value for the field.</li> <li>• <i>Select User Defined Fields</i>: Select to view a list of installed user-defined fields.</li> </ul> <p>Select a specific subset of fields that you want to use with this document type. To use a user-defined field, you must enable it by clicking the <b>Enabled</b> check box for each field. You cannot update individual field attributes using this page. Use the <a href="#">User Defined Fields Page</a> to update field attributes.</p>

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**Note:** If a user-defined field is required and you select the **Automatic Document Creation** check box, the system displays a warning message reminding you that the [Create Document Page](#) will not be available when you automatically create a document with this document type. See [Setting Up User-Defined Fields](#).

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## Roles with Permission to Create Documents

Use this section to add the user roles that can use this document type.

<b>Field or Control</b>	<b>Description</b>
<b>Role Name</b>	Select roles that can create documents using this document type. A user cannot create documents for this document type until the user role is added to this section. Users can have multiple roles. Therefore, one role can create a document using this document type and another role can override a configurator as well as create documents using this document type.
<b>Allow Override Configurator ID</b>	Select to indicate that the selected role has the authority to modify the configurator ID for this document type. When user roles have this option selected, the user can change the <b>Configurator ID</b> field on the <a href="#">Create Document Page</a> .

### Roles with View Access to Documents of This Type

Use this section to determine who can access documents that are created using this document type ID. This setting provides only view access and not edit permission.

<b>Field or Control</b>	<b>Description</b>
<b>Role Name</b>	<p>Select a role name that can view documents that are created with this document type.</p> <p>This option provides an extra level of view access to a document, but does not supersede other areas where view access is granted. For example, users who are added as collaborators on the My Internal Contacts/Collaborators page, users who have administrative rights defined on the User Preferences page, and users who have been assigned as approvers for the approval cycle can still view documents even if their roles are not added to this section.</p>
<b>Document View Access (Apply Role)</b>	<p>Click to grant the role view-access to <i>existing</i> documents with the same document type.</p> <p>If you grant a role access using the <b>Role Name</b> field but do not click <b>Apply Role</b>, the role can only view documents created after you grant access.</p> <p>When you click the <b>Apply Role</b> button and agree to proceed, a confirmation message appears informing you the total number of documents to which the role was granted access.</p>



## Chapter 7

# Setting Up Wizards

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## Understanding Wizards

This topic discusses:

- [Wizards](#)
- [Document Creation Wizards](#)
- [Steps Used to Create and Use Wizards](#)
- [Configurator Selection Wizards.](#)
- [Wizard Bind Variables](#)
- [Question Groups](#)
- [Question Navigation](#)

## Wizards

A wizard is a utility that assists you when authoring a document. There are two types of wizards.

- The document creation wizard.

This type of wizard automatically guides you through a set of questions or prompts, and you provide responses that support the document that you are creating. The utility automates document operations that determine the composition of the document and inserts known information such as supplier ID, dates, amounts, or items into the text of the document. The system stores contract wizard responses in wizard bind records and uses them when generating a document to process the rules and bind variables for the document configurator.

- The configurator selection wizard.

This type of wizard helps you determine which document configurator meets your document need. Using a predefined set of questions, you (as an author) are directed to a configurator that you can use to create a document.

You can access document creation and configurator selection wizards using the Manage Contract Library menu option.

## Document Creation Wizards

You can use the document creation process with the contract wizard to manage documentation procedures and policies. For example, you can use the wizard to ensure that certain contract language limits the extent to which suppliers can use the organization's name in their marketing literature. If the language

applies only in some circumstances, you can create a wizard question to ask the contract authors when the language applies. If they answer that they want a marketing restriction, the system automatically includes the appropriate language in the correct place in the draft contract. If they answer no restrictions, the clause is omitted. Using wizard definitions, the system helps you consider issues that could delay or enhance the contract process.

When you create a document using a wizard, you associate the wizard with a document configurator. The configurator is a template that the system uses to gather elements of a document and to structure the document. When you create a wizard and assign an ID to it, you use that ID in the document configurator. Then, using the configurator to create a document, the system presents the wizard questions to the author. During processing, the system uses the responses that you provide for wizard questions to navigate within the questions of the question groups, to resolve rules, and to include text in the document.

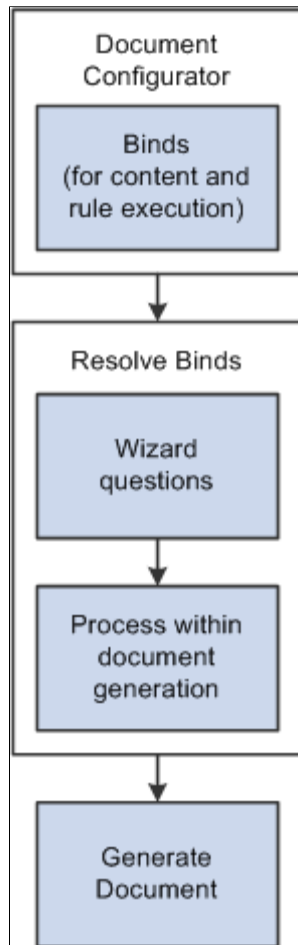
You can use the document creation process with the contract wizard to author adhoc, purchasing contract, purchase order, and sourcing documents. Ad hoc documents are standalone documents that are not associated with a transaction. For example, an ad hoc document might be a nondisclosure agreement. A transaction document is a document that is associated with a contract, purchase order, or event within PeopleSoft Purchasing or Strategic Sourcing applications.

To create a wizard, you define a set of one or more question groups that are unique to the wizard ID. A question group is a set of predefined questions that you can use across multiple wizards. For document creation wizards each question in the question group can be associated with a wizard bind variable. The questions are typically grouped by a specific topic and each question results in a response from the user. If you are using a document creation wizard, the system stores the question responses, in a wizard bind record.

The contract wizard requires that an administrator configure the structures and data for the clauses, sections, rules, and configurators to which wizard definitions relate. Contract authors do not need that level of expertise. They only need the business knowledge to answer the predefined questions.

The next diagram illustrates the flow for document creation using a wizard. The process begins when authors select a configurator ID that uses a wizard. During the processing, authors answer the wizard questions. When completed, they click the **Finish** button, and the system processes the document configurator by running the wizard, resolving bind variables, then creating the authored document.

This diagram illustrates the wizard process using the document creation type wizard:



## Steps Used to Create and Use Wizards

Follow these high-level steps to create a wizard and use it to generate a draft-authored document:

1. Create or review wizard bind variables.

Wizard bind variables are used in a wizard to substitute user-entered values into the text of clauses and documents. They also determine the result of a rule that can include content in the document. Selection wizards are not included in this process. For additional information about wizard bind variables, see [Understanding Bind Variables](#)

2. Create questions groups that are included in wizard definitions.

You define a sequence of questions within a question group. When you create a question group, you indicate whether it's for document creation or a selection wizard. When defining document creation wizards, the question group definition can be a good starting point because it contains features that allow you to link to and define wizard bind variables and rules along with the question group and questions.

A wizard can consist of one or more groups of questions. Each question provides a value for the document or can determine the next question or question group. You can control question navigation using a list of values and navigation to incorporate some questions or to bypass them.

Question groups can apply to a specific source transaction or to multiple transactions. These question groups can be added to wizard definitions and are only executed when the document that is created matches the source transaction for that question group. For more information about question groups, see the [Question Groups Page](#) for selection wizards.

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**Note:** To create questions on a Question Group with valid responses in a drop down all valid answers must be from within the list of valid values. A Blank is not considered a valid value.

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3. Create rules and add them to questions in a question group.

Rules use logic along with wizard and transactional bind variable values to determine the composition of a document. If the logic in a rule is true, then one or more clauses or sections can be added to the document. For example, if a wizard question asks, “Is freight insurance required?”, then the rule in a section or configurator can use the response to determine whether to add one or more clauses or sections to the document that specifies freight insurance requirements. As part of this step, you should create rules that reference wizard responses using bind variables, and include those rules on configurators or sections in document configurators. Rules are determined using a yes or no question on the Rules tab of the [Valid Values and Navigation Page](#).

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**Note:** To use rules with a wizard, you must include them in the document configurator after you create them.

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**Note:** Blanks are always presented as values on account of PeopleTools restrictions. However a rule cannot be executed when a Blank is selected. Therefore questions with valid responses in a drop down cannot be accessed by rule if a Blank is selected.

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4. Set up the wizard definition.

Wizard definitions allow you to define instructions, the status of the wizard, and add question groups in a preferred sequence. You can preview questions, navigate to question groups while defining the wizard, and copy wizard definitions and questions groups. When you initially create a wizard you indicate whether it is a document creation or configurator selection wizard. The wizard status is initially set by the system to *Draft*. You can change the status to *Available* after completing and testing the wizard.

5. Test the wizard.

A Test Mode button allows you to run the wizard without generating a document. You can review the questions within a single or multiple question group to ensure the flow. This provides a method to test the user paths and prompts within the wizard. When a wizard is linked to multiple configurators, you should always test it to evaluate each path. The system does not save the answers that you provide when using the test mode.

6. Create a document configurator and attach the wizard.

You can define or change a wizard for an existing configurator. Using a configurator, you determine whether you use a wizard with a specific source transaction document. You can also designate a configurator for multiple source transactions and define question groups for specific source transactions, and then combine them in one wizard. You should design clause, section, and rule content in the configurator to reference the appropriate wizard responses for the various paths in the wizard that you defined in step 2 of this list.

## 7. Create a document.

Create a document that initiates the configurator selection and the document creation wizard routing. To create a contract document, use the Document Management component from within Supplier Contract Management or access it from the respective source transaction. When creating a document, the configurator selection wizard is called based on how the Document Type Page is defined. If required, the system launches the selection wizard when you add a document definition that guides authors to the correct configurator for the type of document that they need to create. Then, if the selected configurator uses a document creation wizard, the system launches that wizard routing to create the document. For more information about how to setup this type of wizard, see the Define Wizard Page.

## 8. Respond to wizard questions.

The system prompts you with wizard question groups in the sequence in which they were defined in the wizard definition. You can bypass some questions or prompts, if they are not activated, based on bind settings in previous responses or if the question is not required. When creating a new document, if you have a long wizard with many question groups, the document creation wizard provides a Save for Later button that saves wizard values to which you have responded. In this case, the system has not created the document. When you return to the document the system inserts your saved responses, but you must review these from the beginning.

## 9. The system generates a draft, authored document.

The system creates a document using the clauses, sections and rules with the values of the wizard bind variables associated with questions substituted when wizard binds are referenced. For rules that render true, based on wizard bind responses, the system includes the content related to the rule, while clauses that contain wizard bind responses resolve the value.

When wizards are more complex and contain multiple paths to test them, you should test all possible paths in the test environment and generate multiple documents with detailed logging turned on. This ensures that the system populates the correct content and values into the document. You should do this before moving wizards or configurators into your production environment.

If you refresh or re-create a document, you may want to update some or all of the questions. The system prompts you with the existing populated wizard responses, which can be changed.

If you change a question, the system may present additional question, or change the sequence of the questions. This can occur when a changed value affects other questions. For example, if a question is only activated based on the response of a previous question, and the previous questions response is changed, then you need to set the next question to its default value. If the wizard requires a response to a question in a question group, then you cannot proceed to the next question group until you respond. The system displays a warning when required questions are not answered.

When a question which affects the display of previous responses is changed, such responses are blanked out. Responses hidden from view are always removed so as not to affect rules and bind values.

---

**Note:** Blank responses are not considered as valid values and so do not trigger display of questions. You must therefore always select valid values before saving wizard responses. Additionally make such questions mandatory fields, so that an answer also becomes mandatory.

---

## Configurator Selection Wizards

When multiple configurators are available, it can be difficult to know which configurator specifically meets your document requirements. This type of wizard enables you to answer questions that the system uses to determine which wizard is the most appropriate configurator to use. In addition, this limits the need to track and remember configurator IDs. You can only use this wizard feature in conjunction with document types.

Configurator selection wizards determine which configurator to use for a document. If you are using a configurator selection wizard, you define the selection wizard that will select the appropriate configurator. Defining configurator selection wizards is similar to defining document creation wizards because you define a set of questions. However, configuration selection wizards guide you (the author) to the appropriate configurator rather than storing responses that are used in a contract.

When creating a question group, you specify which type of wizard the group is used with. However, you can log and track configurator selection wizard responses using the Generation Logging feature.

Use these steps to invoke a configurator selection wizard:

1. Define any question groups, and create the selection wizard using the Manage Contract Library menu option.
2. Access the [Document Type Page](#).
3. Click the **Configurator Selector** button, and then select the selection wizard you want to use for the document type.
4. Use the [Add a Document Page](#) to create a document using the document type for which the selection wizard has been defined, and click the **Add Document** button.

The selection wizard automatically appears and you are asked questions that selects a wizard.

5. Click the **Finish** button.

The system displays the Create Document page again, this time with the configurator the system will use to create the document. You can run the selection wizard again if you want to change any answers that you initially provided prior to creating the document.

If the wrong configurator is selected by the system, you can click the Configurator Selector button from this page and repeat the selection wizard question to change your answers.

6. Ensure that you have entered a description for the document and click the **Create Document** button.

The system creates the document and, if the configurator includes a document creation wizard, launches that wizard.

## Wizard Bind Variables

Bind variables provide values that the system uses in wizard questions, in rules, or within the content of documents. The system uses two types of binds. The first, wizard binds, store the values of the responses from the questions within the question groups. Wizard bind variables have defined data types that include date, date/time, decimal, integer, string, and yes/no, check box, and prompt types. Document creation wizards and question groups can use bind variables while configurator selection wizards do not.

The second type of bind variable, transaction, pulls information from a source transaction such as the purchasing contract transaction into the content of the contract document during document generation. The system provides predefined field values on the related transaction that you can use in rules and documents. The transactional bind variable value is substituted for the bind variable place holder in the text within the contract content. For example, the system replaces the string `%%Contract Amt%%` within a clause text with the value of the contract amount from the transaction page. Because transaction bind variables map directly to a source transaction they are never specified within a wizard itself.

See [Defining Binds for Wizards](#) and the [Bind Mappings Page](#).

## Question Groups

A question group is a logical set of topic-related questions. A wizard type value specifies if the question group is to be used for a document creation wizard or for configurator selection. Question groups can have one or multiple questions. Each question can result in navigation within the question groups to a set of additional questions on a specific topic or in the case of a document creation wizard, the population of a wizard bind variable value. You can use a question group in one or multiple wizards.

When you assign a wizard bind variable to a question, the system stores the response to that question within the bind variable for later use when you create the document. The wizard bind variable values are specific to a single document generation and are not available to other documents.

You can assign a bind variable to a question used for navigation. You can also select the **No Bind Value** check box for use with navigation. When you select the check box, the valid responses to the question are yes or no, and you can specify different navigation paths for each of those responses.

For a document creation wizard type, you can create a new bind variable from within a question group as you create the group. When you select to add a bind, the system provides access to the Bind Definition page, where you can add a bind to meet your question group needs. After saving the bind, the system places the new bind in the **Bind Variable** field on the Question Groups page. The system places the variable on the question row from which you selected to add the bind variable. From that point within the question group, you can create values and navigation options for the specific question related to this bind variable.

Wizard bind variables can also be used as data placeholders within a contract or document in the same way transactional bind variables are used. For example, the system replaces the string `%Contract_Max_Amount%` within a clause text with the value of the contract amount from the response to a question in the wizard.

For a document creation wizard type, you can also create a new rule from within a question group. Rule creation enables you to evaluate bind variables in the question group. Bind values must already exist before you can create the rule. You use the Valid Values and Navigation page to add a rule. Within the rule definition, the system will default the bind variable and value within the rule criteria. You can then specify which content, clauses or sections, that you want to include in the document if the rule evaluates to true based on the author's response when running the wizard.

After you add the rule and return to the page, the system activates the Show Rules column. So, in the process of adding a question to a question group, you can create a new bind variable, create a valid values and navigation option for the bind, and subsequently add a rule to evaluate the question's bind variable and values. These binds ultimately include or don't include additional content in the document based on the author's response to the question.

---

**Note:** If you enter an unformatted rule value that requires a formatted value, the system automatically formats the value that you enter.

---

You can access question groups using the Manage Contract Library menu or from the Define Wizard page as you create or maintain a wizard definition. Individual questions always belong to a question group.

When you create a question group, you can also copy other question groups into the original group. You use the **Copy From** button to append a complete set of questions from a group into the original group, after which you can resequence all questions in the original question group.

---

**Note:** Be careful that you do not duplicate bind variables when copying question groups. Because you cannot have duplicate binds in a question group, you must change the bind before saving the question group.

---

See the [Copy Question Group Page](#).

## Question Navigation

A question group navigational feature provides the capability for the system to navigate or branch from question to question, within a question group, based on the user's response to a question. Branching enables you to:

- Navigate from question to question based on the user's selection of a value from a list of predefined or valid values and navigation options.
- Navigate from question to question based on the user-entered value.

Navigation options are:

- *Next Group:* Upon question response, navigate to next question group.
- *Next Question:* Upon question response, navigate to next question.

This is the question with the next higher sequence number.

- *Specific Sequence:* Upon question response, navigate to the specified sequence number.

The question sequence number must be higher than the current question sequence number and the question must be defined.

- *Specific Configurator:* Upon question response, use the specified configurator to create the document.

This option is available when you are creating a question group for use with a configurator selection wizard. When you select the option, the system displays a **Configurator ID** field where you can select the appropriate configurator based on the valid value and the response to the question.

Navigation using wizard bind variable data types of date, date and time, and decimal do not support the entry of a values and navigation for the wizard bind variable value. The system disables several fields on the Valid Values and Navigation page, but still provides basic navigation options to go to the next question, the next question group, or a specific sequence.

Navigation using wizard bind variable data types of integer, string, and yes/no, and check box can use values and navigation. The Valid Values and Navigation page provides entry of the valid values,



description, and navigation type for each value entered for the wizard bind variable. The yes/no data type has predefined values of Y and N and predefined descriptions of Yes and No.

When you define or modify questions with yes and no bind types or do not use a bind value, the system provides you a way to define navigation for both yes and no responses. The system displays the **Valid Values** and **Description** fields that are predefined for this bind type. You can also define navigational values. The next examples illustrate the yes and no bind type navigation:

This example illustrates the fields and controls on the Yes/No question group page example. You can find definitions for the fields and controls later on this page.

**Question Groups**

SetID: SHARE Question Group: MATERIAL SHIPPING Copy From  
 Type: Document Creation Delete  
 \*Description: Material Shipping Where Used  
 Clause ID:   
 Instructional Text:

**Questions** Customize | Find | View All | First 1 of 1 Last

*Seq	Reqd	Question/Information Text	No Bind Value	Info Only	Add Bind	Bind Variable	Description	Values/Navigation	Navigate
10	<input checked="" type="checkbox"/>	Inspection Required?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	INSPECTION_REQUIRE	Inspection Required	Define	<input type="checkbox"/>

Save Return to Search Previous in List Next in List Notify Add

After you define a yes and no bind type for a question group, you click the **Define** link to update the navigation for the question as shown in the next example:

This example illustrates the fields and controls on the Yes/No question group navigation example. You can find definitions for the fields and controls later on this page.

**Valid Values and Navigation**

Display Sequence: 10 Bind Variable: INSPECTION\_REQUIRED  
 Question: Inspection Required?  
 Display Option: Display Description at Runtime

**Values/Navigation** Customize | Find | View All | First 1-2 of 2 Last

Default	*Valid Values	Description	*Navigation Choices	Navigate to Sequence
<input type="checkbox"/>	Y	Yes	Next Question	
<input type="checkbox"/>	N	No	Next Group	

OK Cancel

Using this page, you can define how the system should navigate depending on the answer to the question. So in the previous example, if the document author selects Yes when answering the inspection required question, the system goes to the next question. If the author selects No when answering the question, the system navigates to the next question group.

The system also makes it possible to use question group navigation based on a list of values and navigation. The value that you select determines the specific question to which the system navigates. For example, string and integer bind types enable you to create values and navigation from which the document author can select a response. An example of this type of navigation might be when a contract includes different types of material handling. The contract requires different clauses for each method of shipping material. Using values and navigation, you can define questions and question navigation for each of the material shipping methods. You can create values at any point while defining the question group.

This example illustrates how you might create a question group for shipping materials using valid values and navigation:

This example illustrates the fields and controls on the Valid values and navigation question group example. You can find definitions for the fields and controls later on this page.

**Valid Values and Navigation**

Display Sequence: 20      Bind Variable: SHIPPING METHOD

Question: Shipping Method

Display Option: Display Value at Runtime ▼

---

**Values/Navigation**      Customize | Find | View All | First 1-3 of 3 Last

Navigation   Rules  

Default	*Valid Values	Description	*Navigation Choices	Navigate to Sequence		
<input type="checkbox"/>	Truck	Truck Shipment	Specific Sequence ▼	025 - Truck Shipment ▼		
<input type="checkbox"/>	Rail	Rail Shipment	Specific Sequence ▼	030 - Rail Shipment ▼		
<input type="checkbox"/>	Boat	Boat Shipment	Next Group ▼			

OK      Cancel

The purpose of a value list is to enable the document author to have the flexibility to address multiple situations in a document. In the previous example, the author's organization ships material using three methods: truck, rail, and boat. When setting up the question group, you initially provide the author with the choices for the method of shipping on which the contract is based. Then, setting up the navigation, you establish a sequence of questions for the shipping method you select.

---

**Note:** The blank value at the top of a drop down list is not considered a valid value and no navigation occurs if this value is chosen. Always select a valid value from a drop down list to ensure appropriate question display.

---

**Note:** You can select an integer or string bind type, a yes or no type, or a check-box bind type on the Question Group page to enter value lists for a question.

---

The instructions indicate that authors use the question group to create contracts that include material shipments. The first question asks for the method of shipping. A field is available for selecting the method. Navigational details display all the values that are available to answer the question. In the previous example, if you select the *TRUCK* value, the system navigates you to specific question sequence 025, which might begin a series of questions about vehicle weights, safety standards, and so on.

After you define the wizard, the wizard test mode provides a method to test the question logic without generating the document. You click the **Test Mode** button on the Wizard Definition page to test the

wizard. This example illustrates how the system presents questions about material shipments in the wizard test mode:

This example illustrates how the system presents questions about material shipments in the wizard test mode:

Wizard Execution

### Test-Document Creation Wizard

SetID SHARE  
 Wizard ID PURCHASES\_STD\_01 Description Standard Wizard for purchased goods  
 Wizard Instructions This wizard to be used on the majority of procurement related contracts.

Question Groups View All First 1 of 2

Question Group CONTRACT\_SPECIALIST\_PART1 Previous Next

Source Transaction All Sources  
 Group Instructions Used for new contracts. Selected values will be copied from requester responses from the request for contract request wizard.

Questions

Question 10 Request Summary Bind REQUEST\_SUMMARY  
 \*Provide a summary of the purpose for this contract:

Question 15 Additional Information Bind REQUEST\_ADDITIONAL  
 Additional information/instructions for the contract specialist (Requestor / Optional)

Question 20 Adhoc Request Category Bind REQUEST\_CATEGORY  
 ^\*What are you intending to procure with this contract?

Navigation Details

Question 25 Quote Submit Deadline Bind QUOTEDEADLINE  
 If quoting first, what is the deadline for submitting?

Question 30 Include Custom Products Bind WIZ\_CUSTOM\_PRODUCTS  
 Does this proposed contract require any custom products from the supplier?

Question 40 Inspection Required Bind INSPECTION\_REQUIRED

You can define navigation for each value using the same navigation options that are available for all bind types. So, for example, you might have a different question group that deals only with chemical material questions, so you could skip to that question group to include clauses in the document for shipping these types of materials.

## Related Links

[Understanding Microsoft Word Document Generation](#)

[Generating Microsoft Word Documents](#)

## Setting Up Question Groups for a Wizard

### Pages Used to Set Up Question Groups for a Wizard

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Question Groups Page</u>	CS_QUESTION_GROUPS	Define question groups for the wizard to use when resolving binds and determining document content.
<u>Question Groups Page (for configurator)</u>	CS_QUESTGRPS_CONFIG	Define question groups that you use to determine which document configurator to use. This page is similar to the page used to define question groups for the wizard.
<u>Copy Question Group Page</u>	CS_COPY_QUESTGRP	Create a question group based on another group.
<u>Valid Values and Navigation Page</u>	CS_QLIST_VALUES_SP	Define question values and navigation details.
<u>Associated Rules Page</u>	CS_RULES_SP	View rules associated with question groups.
<u>Enter URL for Question Information Page</u>	CS_QUESTINFO_SP	Define informational URLs for questions.
<u>Bind Definition Page</u>	CS_BIND_DEFINITION	Create a bind for use with a question group.

### Understanding Wizard-Specific Binds in Question Groups

Wizard binds provide you a method to capture responses to questions that you create and to use those responses in authored documents either as fill in the blank or to process rules related to document creation. Wizard bind setup begins with defining binds, then associating those binds with questions in question groups. You can use the bind directly within a clause (fill in the blank) or within a rule that the system uses to include specific related content in documents when the rule renders a true result.

See [Understanding Authored Document Rules](#).

Wizard and transactional binds share several bind types, such as date and integer types; however, wizard-specific binds use several unique types for question groups, including:

- Check box binds that enable you to set up multiple yes/no choices for answers to wizard questions.

For example, you can use a series of check boxes to group questions so that additional content (clauses) appear in a document. Each check box that you select in turn determines a rule that includes a specific clause for the document.

- Prompt table binds that provide limited system prompt-table capability.

Prompt tables provide a list of value from which you can select to respond to wizard questions as an alternative to setting up a values and navigation for specific fields that already have values in the database.

- Masking string format binds that define the number of characters that the system uses as input and how it organizes the data.

Setting a mask on a string format bind ensures that when you enter data into the bind variable using the wizard, you enter the data in the proper format. Masking also ensures that the system uses numeric values and alpha characters where they are required and that any special constants are included.

- Long-character string format binds that enable you to use the wizard to add large paragraphs to ad hoc, purchasing contract, purchase order, or sourcing documents, such as adding an ad hoc clause that might not exist in the system but would be specific only to the document being constructed and not intended for reuse.

## Related Links

[Understanding Bind Variables](#)

[Bind Definition Page](#)

## Question Groups Page

Use the Question Groups page (CS\_QUESTION\_GROUPS) to define individual questions that comprise a question group.

Navigation:

**Supplier Contracts > Manage Contract Library > Create Question Groups** Enter the question group name and select the *Document Creation* wizard type.

This example illustrates the fields and controls on the Question Groups page. You can find definitions for the fields and controls later on this page.

*Seq	Reqd	Question/Information Text	No Bind Value	Info Only	Add Bind	Bind Variable	Description	Values/Navigation	Navigate
10	<input checked="" type="checkbox"/>	Will this contract provide an	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	AUTOEXTENDCONTRACT	Automatically extend contract	Modify Values	<input checked="" type="checkbox"/>
20	<input checked="" type="checkbox"/>	Number of years to extend	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	AUTOEXTENDYEARS	Extended years	Define Values	<input type="checkbox"/>

Use this page to define individual questions that comprise a question group.

The system uses wizard questions to resolve special wizard binds that are contained within document. A **Copy From** button is available that enables you to locate and copy an existing question group. A question group must have at least one question and at least one bind variable with which it is associated.

Binds that are not yes/no binds should appear only once in a question group. When you save the question group, the system validates for yes and no questions that can be left unresolved for a single question.

<b>Field or Control</b>	<b>Description</b>
<b>Copy From</b>	<p>Click to access the Copy Question Group page, where you can select a SetID and a specific question group from which to copy questions into the current question group or the question group you are creating.</p> <p>You can copy across source transactions. However, bind variables cannot be duplicated. The new questions inherit the source transaction of the question group being copied to.</p> <p>See <a href="#">Copy Question Group Page</a>.</p>
<b>Delete</b>	<p>Click to remove this question group from the system. This button is available after you create and save a question group, but is not available after the question group has been assigned to a wizard.</p>
<b>Type</b>	<p>Displays the type of wizard to which this question group belongs. The <i>Configurator Selection</i> wizard type includes question groups that contain questions that you can use to help determine a configurator for a document. The <i>Document Creation</i> type determines document contents.</p>
<b>Source Transaction</b>	<p>Select <i>Ad Hoc, Purchase Contracts, Purchase Orders, or Sourcing Events</i> when <i>Configurator Selection</i> is selected in the Wizard Type field.</p> <p>Select <i>Ad Hoc, All Sources, Purchase Contracts, Purchase Orders, or Sourcing Events</i> when <i>Document Creation</i> is selected in the Wizard Type field.</p> <p>All Sources allow a question group to be accessed by any wizard that calls it, regardless of the source transaction of the wizard itself.</p> <p>Source Transaction options are determined on the "Installation Options - Supplier Contract Management Page" (Application Fundamentals).</p>
<b>Clause ID</b>	<p>Select the clause from which you want to gather bind variables to include in this question group. A clause ID is not required to create a question group. When you use a clause to define a group, the system searches the clause for any defined wizard binds and populates the question grid with those bind variables. If the clause you select does not contain bind variables, the system displays a warning message and does not populate the question. This field is not available for configurator selection type question groups.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Instructional Text</b>	<p>Enter additional information that might aid in the use of this question group, such as material from a published regulation. This text will always be available for review when using the question group. If you use a clause, the system populates this field with the instructional text from the clause. If you do not include instructional text, this field does not display when you run the wizard.</p>
<b>Where Used</b>	<p>Click to view where the question group is in use on wizard definitions. You can view which wizard definitions might be affected by a change to this question group.</p>
<b>Seq</b> (sequence)	<p>Enter a number that defines the order in which the question is asked in the question group. You can redefine the sort order at any time. The wizard uses the display sequence during execution to order the questions. The system will automatically order the questions from the lowest to the highest number. You cannot use the same number twice and you can use any number up to 999.</p> <p>If you make a sequence change that would affect a set of responses already given to this question group, the system displays an error. This field is required.</p>
<b>Required</b>	<p>Select to indicate that the response box must be completed when you run the wizard. If you select a bind variable and it is a yes/no bind, then the system automatically selects the <b>Required</b> check box, but you can deselect the check box. If you specify navigation when the question is required, then you cannot deselect the check box.</p>
<b>Question/Information Text</b>	<p>Enter a question. This is the question that document authors answer when they run the wizard to create a document. The answers to these questions determine the content of the document based a combination of bind variables and yes and no answers. This is a required field.</p> <p>Click the <b>Expand</b> button next to the <b>Question</b> field to increase the text display area and enter longer questions. Click the <b>Spell Check</b> button to check the spelling of the question.</p> <p>If you are creating an information-only question, you do not have to enter a question if you set up a URL for use with this line.</p>

<b>Field or Control</b>	<b>Description</b>
<b>No Bind Value</b>	<p>Select to indicate that a question is not directly tied to a bind variable, but is used to determine flow within the group. The system disables the <b>Bind Variable</b> field. If you leave the field blank, you must select a bind variable.</p> <p>If you are updating the question and change the value in this field, the system displays a warning message. When you select this check box, you cannot select the <b>Info Only</b> check box. Changing bind variables removes list and navigation values that are based on the bind type and length. If you entered a bind variable, and then selected the <b>No Bind Value</b> check box, the system will blank out the bind variable and replace the valid values with a yes/no type for the question.</p>
<b>Info Only</b> (information only)	<p>Select to create a question that is to be used for informational purposes only. These type of questions do not use bind assignments and when you select the <b>Info Only</b> check box, the system prevents the entry of values for the <b>No Bind Value</b>, <b>Add Bind</b>, <b>Bind Variable</b>, and <b>Valid Value</b> columns.</p> <p>You can use information-only questions for any purpose to provide authors information. For example, you can use an information-only question as a header preceding a list of check box questions that are logically grouped together. Authors do not provide answers to information-only questions. The system displays the question in the wizard without a blue horizontal line separating it from the question below. This default behavior enables the system to group the information with the questions that follow the information.</p> <p>You can have a blank information-only question as long as you add an URL. This URL will appear when you run the wizard. If you don't have a URL defined for blank questions, the system displays an error message when you attempt to save the question.</p> <p>When you define a bind variable for a question, you cannot select the <b>Info Only</b> check box. If you select the Info Only check box you can only enter question text or setup a URL. You are not required to enter question text, because you may just want a URL on the page.</p>
<b>Add Bind</b>	<p>Click to access the Binds page where you can create a bind and use it in this question group. If you are changing an existing bind, the system will remove any list and navigational values defined for the question. After you complete the bind, the system automatically adds it to the <b>Bind Variable</b> field.</p>



<b>Field or Control</b>	<b>Description</b>
<b>Bind Variable</b>	<p>Select a bind variable. This variable is placeholder data within a contract or document, or it can be used in rules to control composition of the document. The system replaces the bind variable with the data represented by the variable when the document is created.</p> <p>You assign a bind variable to a question and the system stores the wizard response to that question with the bind variable for later use during document generation. The system defines binds in the wizard using the CS_BIND table with a CS_BIND_TYPE of Wizard=3.</p> <p>After you enter a list of values for a bind, the bind is protected so it cannot be changed. If you do not enter list values, then the bind is always available for use with a question and can be changed.</p> <hr/> <p><b>Note:</b> You cannot use the same bind more than once in a document. The system displays a warning when you attempt to save a wizard that contains the same bind, even if the bind is in another question group.</p> <hr/>
<b>Description</b>	Displays the description of the bind variable. You can update the description using the Bind Definition page.
<b>Values/Navigation</b>	<p>Click to access the Valid Values and Navigation page, where you can define or modify values and navigation for this question. You can also view and define rules for the question. This column is not available when you select to create an information-only question. The <b>Modify</b> link appears when you either select a yes/no or date bind variable or when you do not use a bind variable.</p> <p>The <b>Define</b> link appears when you have not taken an action or after you have made an update on the Valid Values and Navigation page.</p>
<b>Navigate</b>	Indicates whether the available responses to this question have defined navigation values. Click the <b>Define</b> or <b>Modify</b> link to access the navigation setup.

### More Details Tab

<b>Field or Control</b>	<b>Description</b>
<b>Setup URL</b>	Click to access the Enter URL for Question Information page where you can add a URL link as a part of this question group. You use the URL to link to additional information for the question or question group. If you are adding a URL, click the <b>Define</b> link. If you are updating an URL, click the <b>Modify</b> link.
<b>Field Type</b>	<p>Displays the type of field. This value is determined by the system when you select to include or not include a bind in a question. If you select a bind, the field type for that bind appears in the <b>Bind Variable</b> field. If you select not to include a bind, then <i>Yes/No</i> appears. Field types include: <i>String</i>, <i>Integer</i>, <i>Date</i>, <i>Date/Time</i>, and <i>Yes/No</i>.</p> <p>Along with the field type, the size of the field is displayed when the field type is <i>String</i>. When the bind is other than a string field type, the system does not display values. The system determines string sizes when you define the bind and select <i>String</i> as the field type. The system prompts you for the maximum number of characters to use in the string. Values are: 2, 5, 12, 30, and 254 characters.</p>

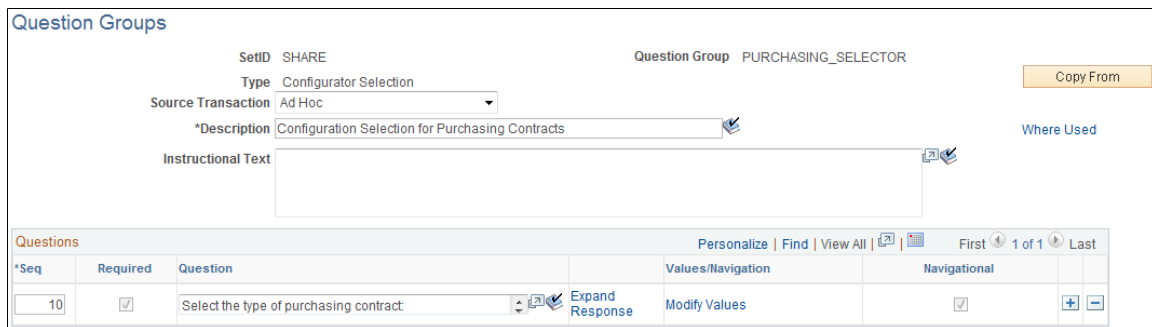
### Question Groups Page (for configurator)

Use the Question Groups page (CS\_QUESTION\_GROUPS\_CONFIG) to define question groups that you use to determine which document configurator to use. This page is similar to the page used to define wizard document question groups.

Navigation:

**Supplier Contracts > Manage Contract Library > Create Question Groups.** Enter the question group name and select the *Configurator Selection* wizard type.

This example illustrates the fields and controls on the Question Groups Page (for configurator).



The system uses wizard questions to resolve special wizard binds that are contained within document. A Copy From button is available that enables you to locate and copy an existing question group. A question group must have at least one question and at least one bind variable with which it is associated.

Binds that are not yes/no binds should appear only once in a question group. When you save the question group, the system validates for yes and no questions that can be left unresolved for a single question.

The Question Groups page for configurator selection questions is similar to the page for document creation questions, but its purpose is different. Questions for configurator selection wizards should guide authors through questions that help them determine which document configurator best meets their requirements. Configurator selection wizards are assigned to document types on the Document Types page. The system selects the configurator to which the question responses lead.

Examples of these types of questions might include:

- What are you intending to procure with this document?
- Does the document require legal approval?

The differences between the pages are that the configurator selection page:

- Uses a **Source Transaction** field that defines the source transaction type for which you can use the configurator selection wizard.
- Does not use a **Clause ID** field.
- Does not include bind variable information and their field types, because the system does not store binds.

See [Question Groups Page](#).

<b>Field or Control</b>	<b>Description</b>
<b>Source Transaction</b>	<p>Select the source transaction on which you want to base this question group. This field is available only when you are creating a configurator selection type question group.</p> <p>Values include:</p> <ul style="list-style-type: none"> <li>• <i>All Sources</i>: Select if you want this question group to apply to all source transactions. When selecting this option, bind variables must be generic and may not be duplicated in other question groups used by the wizard. The question group does not pull data from a specific transaction.</li> <li>• <i>Ad Hoc</i>: Select if you want this question group to use an ad hoc document configurator ID. Ad hoc source transaction documents are not constrained by procurement requirements, and you can use them for a variety of organizational purposes.</li> <li>• <i>Purchase Orders</i>: Select if you want this question group to use a document configurator based on a purchase order. Purchase order documents are based on PeopleSoft Purchasing purchase orders.</li> <li>• <i>Purchasing Contract</i>: Select if you want this question group to use a document configurator based on a purchasing contract transaction. Purchasing contract transaction documents are tied to a specific contract ID and extract specific information from the contract to include in the document.</li> <li>• <i>Sourcing</i>: Select if you want this question group to use a document configurator based on a sourcing event transaction. Sourcing event contract transaction documents are tied to a specific Event ID and extract specific information from the event to include in the document.</li> </ul>

## Copy Question Group Page

Use the Copy Question Group page (CS\_COPY\_QUESTGRP) to create a question group based on another group.

Navigation:

**Supplier Contracts > Manage Contract Library > Create Question Groups.** Click the **Copy From** button on the Question Groups page.

This example illustrates the fields and controls on the Copy Question Group Page. You can find definitions for the fields and controls later on this page.

**Copy Question Group**

Each Question Group being copied will be appended to any questions that may already exist in the grid. If question group instructions or clause ID on the originating page are blank, then these will be copied as well.

SetID SHARE

Question Group CONTRACT\_SPECIALIST\_PART2

---

From SetID SHARE

Copy From Question Group  

After you copy the group, you can edit the questions to create the new question group.

When using the **Copy From** button on the Questions Group page, you can either create a new question group or append an existing question group with questions from the group you are copying.

After appending a copied question group to the original group, you can re-sequence questions, but keep in mind that resequencing is subject to cross checks with navigational references.

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**Note:** Remember that when re-sequencing questions, the system validates navigational references. So the question must be sequenced to match the navigation or you need to update navigation references.

---

After you select the group to copy and click **OK**, the system populates the new group with the copied questions. You can then edit, add, or delete questions.

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Copy From Question Group</b>	<p>Select the question group from which you want to either create a new group or append an existing question group. The valid values and navigation list contains only the question groups for the wizard type you are using.</p> <p>For copied items, the system increments lines in the <b>Navigate to Sequence</b> field on the Valid Values and Navigation page by the amount of the initial starting sequence number. The system also provides a message to warn you to verify the sequence numbers. If you are copying from multiple question groups, you should perform a save between copying different question groups. If a transaction is outstanding, the system prompts you to save and continue with the copy function.</p>

## Valid Values and Navigation Page

Use the Valid Values and Navigation page ( CS\_QLIST\_VALUES\_SP) to define question values and navigation details.

Navigation:

Click the **Modify** or **Define** link in the **Values/Navigation** field on the Question Groups page.

This example illustrates the fields and controls on the Valid Values and Navigation page: Navigation tab. You can find definitions for the fields and controls later on this page.

**Valid Values and Navigation**

Display Sequence 10      Bind Variable AUTOEXTENDCONTRACT

Question Will this contract provide an automatic extension at expiration?

Display Option Display Description at Runtime

---

Values/Navigation Personalize | Find | View All | [?] [ ] First 1-2 of 2 Last

**Navigation** | Rules

Default	*Valid Values	Description	*Navigation Choices	Navigate to Sequence
<input type="checkbox"/>	Y	Yes	Next Question	
<input type="checkbox"/>	N	No	Next Group	

Use this page to define how to process responses to questions and how you can branch from one question to another. Branching provides flexibility in navigating from question to question in a question group.

**Note:** If you are defining a question group that uses a configurator selection wizard type, the Rules tab is not available because the system does not store those values.

<b>Field or Control</b>	<b>Description</b>
<b>Display Sequence</b>	Displays the order in which the question is asked in the question group.
<b>Question</b>	Displays the question text.
<b>Display Option</b>	Use this field to select how you want the system to display information about the question group. Values include:  <i>Display Description at Runtime:</i> Displays the value description when the system processes the wizard during document generation and during wizard testing.  <i>Display Value at Runtime:</i> Displays the actual value when the system processes the wizard during document generation and during wizard testing.  <i>Navigation Only (No Values):</i> Prevents entering valid values and instead provides only navigation options. This value is not available for question groups using a configurator selection wizard type.
<b>Default</b>	Select to define this question response as the default value. When you select a default value, the system displays the default as the value when an author is creating a document.

<b>Field or Control</b>	<b>Description</b>
<b>Valid Values</b>	Enter a value that the system can make available to authors to answer this question.
<b>Description</b>	Enter a description of the value that you entered in the <b>Valid Value</b> field.
<b>Navigation Choices</b>	<p>Select a navigation action that the system should take when a document author is using the wizard to create a document. Values include:</p> <p><i>Next Group</i>: Select to indicate that the document author should use the first question in the next question group.</p> <p><i>Next Question</i>: Select to indicate that the document author should use the next sequenced question in this question group.</p> <p><i>Specific Configurator</i>: Select to indicate that the document author should navigate to a specific document configurator. When you select this option, the system makes the Configurator ID column available, where you must provide a configurator ID. Also, when a document author is answering the wizard question, the wizard ends with this navigation and the selected configurator is used to create the document. This value is available only for document configurator selection wizards.</p> <p><i>Specific Sequence</i>: Select to indicate that the document author should bypass the next question and go to a specific question in this question group.</p>
<b>Navigate to Sequence</b>	Select a sequence number that represents the next question you want to ask in the question group. You can select questions with a sequence number higher than the current question. This field becomes available when you select <i>Specific Sequence</i> in the <b>Navigation Choices</b> field.
<b>Configurator ID</b>	Select a document configurator that you want this wizard to provide based on question answers. You can define a different configurator for each question. This field is available when you select <i>Specific Configurator</i> in the <b>Options</b> field.

## Rules

You use this page to view and define rules for use with a question. The system uses the responses that you provide for wizard questions to resolve rules for including text in a document. Rules use logic along with wizard and transactional bind variable values to determine document composition. If the logic in a rule is true based on wizard bind responses, the system includes the content that is related to the rule in the document.

See Document Creation Wizards in the [Understanding Wizards](#) topic.

Using this page, you can define rules that apply for unformatted strings, integers, and yes/no binds. You can define one or more rules for each value. The rules only display for the values that appear on this page.

You need to add the question for the bind before adding a rule. If you use the Rules page to add a rule for a wizard bind, then you access the Question Group page and try to enter values for that bind, the system displays an error message. In this case you can delete the rule and start over with the question first.

<b>Field or Control</b>	<b>Description</b>
<b>Default</b>	Select to make this value the default value for the question. If a default value has already been selected on the Navigation tab, that value appears in this check box.
<b>Valid Values</b>	<p>Enter values for the question. If valid values have been defined on the Navigation tab, those values are used as default values for the Rules tab.</p> <hr/> <p><b>Note:</b> Make sure that you enter valid values before clicking the <b>Add Rule</b> button. The system displays an error message if a valid value has not been defined.</p> <hr/>
<b>Add Rule</b>	<p>Click to access the <a href="#">Rules Page</a>. This page contains defaults for the bind variable. You can only enter rules for the values that have been entered.</p> <p>After you save the rule, the system returns to the Valid Values and Navigation page and displays the <b>Show Rules</b> button. The <b>Add Rules</b> button still appears because you can add multiple rules for a particular question value.</p>
<b>Show Rules</b>	Click to view the rules associated with this question. You can define one or more rules for each valid value. If you have multiple values and some do not have corresponding rules, the system displays <i>No Current/Active Rule</i> in the Show Rules column.

## Associated Rules Page

Use the Associated Rules page (CS\_RULES\_SP) to view rules associated with question groups.

Navigation:

Click the **Add Rules** button on the Valid Values and Navigation page.



This example illustrates the fields and controls on the Associate Rules page.

Associated Rules					
Bind Variable AUTOEXTENDCONTRACT					
Rules for This Bind and Value			Personalize   Find   View All   First 1 of 1 Last		
Rules	Effective Date	Status as of Effective Date	Bind Variable	Compare Operator	Value
AUTOEXTENDTERM	01/01/2005	A	AUTOEXTENDCONTRACT	=	Y

This page provides information about the bind rules that includes the effective date, status, and compare operator. Click the **Rules** link to access the Rules page where you can view and maintain rule details.

## Related Links

[Setting Up Rules](#)

## Enter URL for Question Information Page

Use the Enter URL for Question Information page (CS\_QUESTIONINFO\_SP) to define informational URLs for questions.

Navigation:

Click the **Define** or **Modify** link in the **Setup URL** column on the Question Groups page.

This example illustrates the fields and controls on the Enter URL for Question Information page.

Enter URL for Question Information	
Display Sequence	10
Question Group	CONTRACT_SPECIALIST_PART2
Question	<input type="text" value="Will this contract provide an automatic extension at expiration?"/>
Label	<input type="text"/>
URL Text	<input type="text"/>
<input type="button" value="Test URL"/>	

You can provide additional information for questions by adding an URL link. For example, you can provide access to supplier product photos, numbers, or warranty information or maybe access to legal or government information about a product or service. The URL information is stored on the question and is loaded into the link when an author runs the wizard, providing information that is useful to responding to a question. The URL opens in a separate window when you open it from within a wizard. The **Test URL** button is available so that you know that the URL link works when entering the URL on the question. When you use an URL, the **Info** button appears with the link label text when you use the question in a wizard.

<b>Field or Control</b>	<b>Description</b>
<b>Display Sequence</b>	Displays the order in which the question is asked in the question group.
<b>Question Group</b>	Displays the name of the question group to which you are attaching the URL.
<b>Question</b>	Displays the specific question to which this URL will be attached as supporting information. If a question is selected as information only, this field can be blank if you attach a URL to the question.
<b>Label</b>	<p>Enter the name that you want to assign to the URL. The label appears when document authors create documents that use a wizard with this question group attached. The label name should provide document authors with an indication of what they use the URL.</p> <p>When the wizard is running, the label appears as a link along with the question. Authors can access the URL by clicking the link.</p>
<b>URL Text</b> (uniform resource locator text)	<p>Enter or paste the URL that you want to make available with this question. The URL must begin with http and you can enter only one URL for a question.</p> <p>To add another URL link that will appear with this question in the wizard:</p> <ul style="list-style-type: none"> <li>• Complete the first URL address, and navigate to the Question Group page.</li> <li>• Insert another question using the next sequence number, but do not enter a question.</li> <li>• Select the <b>Info Only</b> check box for the question, and click the <b>Define</b> link to access the Enter URL for Question Information page.</li> <li>• Leave the <b>Question</b> field blank.</li> <li>• Enter another label and another URL.</li> </ul> <p>When you run the wizard, the first question will have two URLs available to support the first question. You can perform these steps again to define multiple URLs for a question.</p>
<b>Test URL</b>	Click to verify that the URL that you entered is valid. The system provides a warning if the URL is not valid.

## Defining Wizards

### Pages Used to Define Wizards

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Define Wizard Page</u>	CS_WIZARD_SUMM	Define wizard information for document creation or configurator selection wizards.
<u>Test-Document Creation Wizard Page</u>	CS_WIZARD_EXECTEST	Test wizard values for document creation wizards.
<u>Test-Configurator Selection Wizard Page</u>	CS_WIZARD_EXECUTE	Test wizard values for configurator selection wizards.
<u>Wizard Summary Page</u>	CS_WIZSUMM_SP	View expanded wizards.

### Understanding How to Test Wizard Values

Use the Test-Document Selection Wizard and the Test-Configurator Selection Wizard pages to review how the system presents the questions. In test mode, the system processes the wizard questions but does not create a document.

When in test mode, bind variables, navigation, required check boxes, and question descriptions are visible for each question. The question, using a defined set of valid values, also has a Navigation Detail grid to display the valid values, description, and navigation details.

You can also enter values to test the navigation flow, but the system does not save the values. Use the Next and Previous buttons to navigate between question groups in test mode. You can change the responses to questions to assist in resolving navigation logic. The system populates the length for the question response from the wizard bind definition.

Use the Navigation Details grid to view navigation details for a question.

When testing a configurator selection wizard, and there is a question answered that resolves the wizard, the system displays a note indicating what happened. During actual document processing, you would be returned to the document creation process at that point.

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**Note:** When the wizard is in execute mode, question groups might be skipped if the source transaction does not match the document type.

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### Define Wizard Page

Use the Define Wizard page (CS\_WIZARD\_SUMM) to add or maintain a document creation or configurator selection wizard.

Navigation:

**Supplier Contracts > Manage Contract Library > Define Wizards**

This example illustrates the fields and controls on the Define Wizard page.

*Display Sequence	*Question Group	Question Description	Source Transaction
10	CONTRACT_SPECIALIST_PART1	Summary contract specialist information	All Sources
20	CONTRACT_SPECIALIST_PART2	Contract automatic extension	All Sources
30	SI_CONTRACT	Special Instructions for PO contract execution	Purchasing Contracts
40	SI_PURCHORDER	Special Instructions for Purchase Orders	Purchase Orders
50	SI_SOURCING	Special Instructions for Sourcing	Sourcing Events

You can use this page to add or maintain a document creation or configurator selection wizard. When you add a wizard, the **Copy From** button is available for you to locate and copy an existing wizard. When you maintain a wizard, the **Test Mode** button is available to test the wizard flow.

The same bind variable cannot be used in a Question Group of Source Transaction type of *All* and a specific Source Transaction type on the same wizard.

<b>Field or Control</b>	<b>Description</b>
<b>Wizard ID</b>	Displays the system identifier for this wizard. When the wizard is available for use, you can select it from the wizard ID list when you create or maintain a document configurator.
<b>Copy From</b>	Click to access the Copy Wizard Definition page. You use the page to search for other wizard IDs that might be similar to the type of document requirement you have. The search is within the current SetID. When you save the current question group, the Copy From button is no longer available and is replaced by the <b>Delete</b> button. After you use the wizard in a document, the <b>Delete</b> button also becomes unavailable.
<b>Test Mode</b>	Click to access either the Test-Document Creation Wizard or the Test-Configurator Selection Wizard page, where you can review and verify the question flow used with the wizard. This button is available after the wizard is saved. See <a href="#">Test-Configurator Selection Wizard Page</a> .

<b>Field or Control</b>	<b>Description</b>
<b>Wizard Type</b>	<p>Displays the type of wizard the system will create. You select this value when you add the wizard, and it determines the use of the wizard. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Configuration Selection</i>: Select to define the wizard for use with a document type. The document type uses questions in wizard to guide you to the appropriate configurator.</li> <li>• <i>Document Creation</i>: Select to use the wizard with a document configurator to create a document. Using this type of wizard, you define the wizard ID on the Document Configurator Definition page, and during document creation, you use question groups to populate bind variables for the document.</li> </ul>
<b>Source Transaction</b>	<p>Select a source transaction type on which to base the use of this wizard. This field is available when you select the <i>Configuration Selection</i> value in the <b>Wizard Type</b> field. When you select the source transaction, the system limits the use of the wizard to that transaction type. Values include: <i>Ad Hoc</i>, <i>Purchasing Contracts</i>, <i>Purchase Orders</i>, and <i>Sourcing Events</i>.</p>
<b>Wizard Status</b>	<p>Select a value to indicate the state of the wizard. The status determines if the wizard is available for use throughout the system or is still in a draft mode. The <i>Available</i> value means that you can use the wizard to create documents, and the wizard will appear in lists of values for wizards. If you select <i>Draft</i>, the wizard cannot be used to create documents and does not appear with available wizards.</p>
<b>Where Used</b>	<p>Click to access the Search for All Content Instances page, where you can view where this wizard is used.</p>
<b>Description</b>	<p>Enter a value that uniquely describes the wizard.</p>
<b>Wizard Instructions</b>	<p>Enter any information that you want to provide with the wizard. The information should relate to the purpose of the wizard and any requirements for its use in creating a document.</p>
<b>View Expanded Wizard</b>	<p>Click this link to access the Wizard Summary page. Use this page to view all aspects of the wizard, including its questions, sequence, and navigation routes. You can also download the information to a Microsoft Excel spreadsheet.</p>
<b>Create New Question Group</b>	<p>Click to access the <a href="#">Question Groups Page</a>, where you can define another set of questions for this wizard. The system provides a new page for this function.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Display Sequence</b>	Enter the order in which the system should use a question group. When you use the wizard to create a document, the Wizard Execution routine asks the questions contained in the group in the sequence you define, beginning with the lowest number.
<b>Question Group</b>	Select a group of questions that you want to use in this wizard definition. You can define multiple groups and execute them in any sequence you define. Available question groups are determined by the wizard type you select.
<b>Question Description</b>	Click to view the questions contained in this question group. Along with the questions, you can view yes and no navigation details and the bind variables. You use this link to verify that you selected the correct question group.

## Prerequisites

Before you can set up the Define Wizard page, you must:

1. Define wizard bind variables using the [Bind Definition Page](#).
2. Map binds using the [Bind Mappings Page](#).
3. Define question groups using the [Question Groups Page](#).

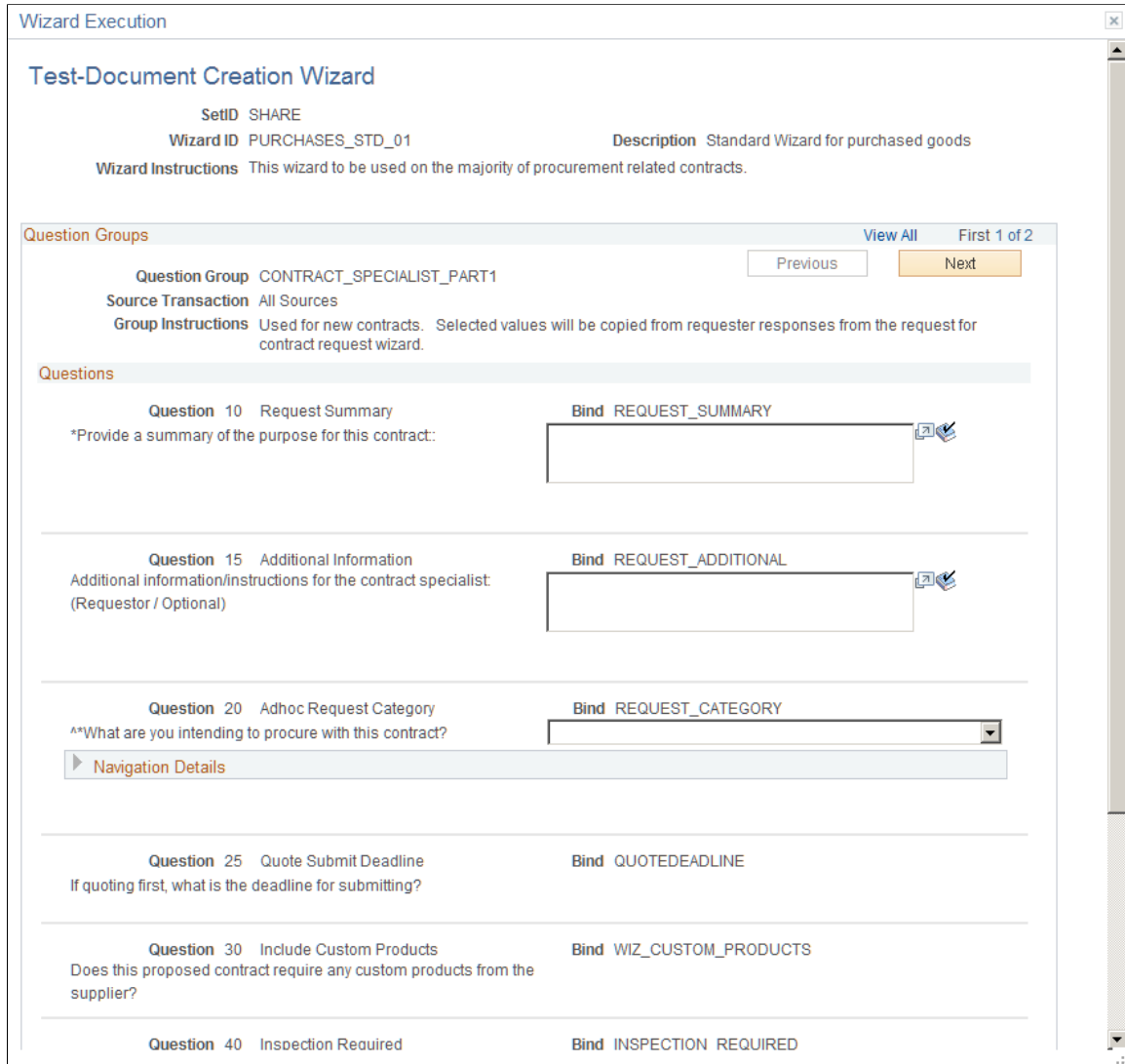
## Test-Document Creation Wizard Page

Use the Test-Document Creation Wizard page (CS\_WIZARD\_EXECUTE) to test wizard values for document creation wizards.

Navigation:

**Supplier Contracts >Manage Contract Library >Define Wizards** Click the **Test Mode** link on the Define Wizard page for a document creation wizard.

This example illustrates the fields and controls on the Test-Document Creation Wizard Page.



## Test-Configurator Selection Wizard Page

Use the Test-Configurator Selection Wizard page (CS\_WIZARD\_EXECUTE) to test wizard values for configurator selection wizards.

Navigation:

Click the **Test Mode** link on the Define Wizard page for a configurator selection wizard.

<b>Field or Control</b>	<b>Description</b>
<b>Group Instructions</b>	Displays the instructions for each group as you go from one group to another. You cannot edit the instructions in test mode because they are read-only. If instructions were not entered for the question group, then this field does not appear.

<b>Field or Control</b>	<b>Description</b>
<b>Finish</b>	Click to terminate the test mode and return to the Define Wizard page.
<b>Cancel</b>	Click to return to the Wizard Definition page at anytime while you are testing the wizard.

## Wizard Summary Page

Use the Wizard Summary page (CS\_WIZSUMM\_SP) to view expanded wizards.

Navigation:

Click the **View Expanded Wizard** link on the Define Wizard page.

Use the page to view how a wizard flows. Unlike testing a wizard, during which you use the wizard to review questions, the Wizard Summary page enables you to see the entire flow of the wizard, including its navigational jumps on the same page and possible answers to questions. You can print the page and download it to a Microsoft Excel spreadsheet.

<b>Field or Control</b>	<b>Description</b>
<b>Seq</b> (sequence)	Displays the sequence of question groups within the wizard.
<b>Question Group</b>	Displays the name of the question group. Values in this column represent a single question group. Information below this row relates to questions in this question group.
<b>Question Display Sequence</b>	Displays the sequence of questions within the question group.
<b>Question</b>	Displays the question. Multiple questions can appear with a question group.
<b>Bind Variable</b>	Displays the bind variable value. If the <b>No Bind Value</b> check box was selected on the Question Group page, <b>** no bind variable **</b> appears in this field.
<b>Required</b>	Displays whether a response is required for the question. Values include <i>Y</i> and <i>N</i> .



<b>Field or Control</b>	<b>Description</b>
<b>Display Option</b>	<p>Displays how the system presents information about the question group when it processes a question. Values include:</p> <ul style="list-style-type: none"> <li>• <i>Display Description at Runtime</i>: Displays the description when the system processes the wizard during document generation and during wizard testing. This value corresponds to the <b>Answer Description</b> field and is the value that displays when you select this option.</li> <li>• <i>Display Value at Runtime</i>: Displays the value when the system processes the wizard during document generation and during wizard testing. This value corresponds to the <b>Possible Answers</b> field and is the value that displays when you select this option.</li> <li>• <i>Navigation Only (No Values)</i>: Displays only the navigation that the system uses when an author responds to this wizard question. This value is not available for question groups using a configurator selection wizard type. The value corresponds to the <b>Navigate</b> field and is the value that displays when you select this option.</li> </ul>
<b>Possible Answers</b>	<p>Displays the answers that have been defined for the question. You define these values using the <b>Define</b> or <b>Modify</b> link on the Question Groups page. Use the <b>Valid Values</b> field on the Valid Values and Navigation page to define the value.</p>
<b>Answer Description</b>	<p>Displays the description for the answer.</p>
<b>Navigate</b>	<p>Displays the navigation for this question. For example, depending on the answer, the system might navigate to the next question group.</p>
<b>Go to Seq</b> (go to sequence)	<p>Displays the sequence number for the next question.</p>
<b>Hyperlink Label</b>	<p>Display the name of the link for the associated URL. This value appears when a URL has been defined along with the question. When the wizard is running, the label appears as a link along with the question. Authors can access the URL by clicking the link.</p>
<b>URL Text</b> (uniform resource locator text)	<p>Displays the actual text of the URL. You cannot access the URL from the Wizard Summary page, but you can copy and paste the link to view the URL.</p>
<b>Configurator ID</b>	<p>Displays the configurator selection wizard that the system will use with the corresponding answer to this question.</p>

## Creating Documents Using Wizards

### Pages Used to Create Documents Using Contract Wizards

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Wizard Execute - Document Creation Page</u>	CS_WIZARD_EXECUTE	Create documents using contract wizards.
<u>Test-Configurator Selection Wizard Page</u>	CS_WIZARD_EXECUTE	Create a document type that uses a configurator selection wizard on the Add a Document page.

### Understanding Document Creation

When you create a document, the system establishes a document based on the structure that is defined in the document configurator and answers to wizard questions. The system loads the wizard definition that is associated with the configurator ID and runs the question group or groups that are associated with the wizard definition. Authors will answer questions when prompted by the contract wizard. At the end of the process, the system creates the document that is ready for editing or approval.

You should not change a wizard that is currently being used in documents because the wizard question responses can change the composition of the document and can change information in the content of the document. If a wizard is changed, for example, you add a new question, you must evaluate how the changes will affect existing documents or contracts. If you make a change to a question group that is associated with a wizard that would affect multiple uses of that question group, the system displays a warning message. In this case, the system retains any common information between the old and new versions of the wizard. But you will still need to enter any information that is no longer valid or is newly required. Also, as the navigation could change, you need to enter any new fields that appear as part of the modified navigation.

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**Note:** Amendment document configurators cannot have wizards specified for them; however, amendment configurators can use any wizard bind values set during the original generation of the contract.

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To create a document using a wizard:

1. Determine the document configurator and corresponding wizard that relate to the document you want to create.
2. Ensure that the **Wizard ID** field on the Document Configurator Definition Page displays the wizard that you want to use.
3. Access the Contract page for entering a purchasing contract, the Purchase Order page for purchase order or the Create Document Page for ad hoc contracts.

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**Note:** When entering contract or purchase order information, the transaction must already exist.

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4. Click the **Add a Document** button.

The system displays the Document Management page. Make sure that you enter the configurator with the appropriate wizard in the **Configurator ID** field and complete the remaining entries. Also, ensure that the dates are valid or you will not be able to save the document when you complete it. You should have run the wizard in test mode to determine if any validation problems occur.

5. Click the **Create Document** button.

The system displays the Wizard Execution page along with the wizard questions. You scroll through the pages answering wizard questions. The system hides questions that are not part of the navigation based on the author's responses to the questions. The system provides **Next** and **Previous** buttons for you to use in scrolling between question groups. When you reach the last question group, the system displays the **Finish** button.

6. Click the **Finish** button to complete the wizard questions.

The system displays the Document Management Page with the document details and sets the document status to *Draft*. At this point, you can view or edit the document or send it for collaboration or approval.

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**Note:** The system warns you if the wizard has changed since the document was generated. Changes in the wizard's use in a document can affect the composition of the document and may change values within the content.

---

## Wizard Execute - Document Creation Page

Use the Wizard Execute - Document Creation page (CS\_WIZARD\_EXECUTE) to create documents using contract wizards.

Navigation:

**Supplier Contracts > Create Documents and Contracts > Document Management.** Select a configurator ID that uses a contract wizard for document creation.

The system automatically displays these pages when you are using wizards.

Use these pages to answer wizard questions. The system displays information about the wizard that includes the description and instructions. The Question Groups area displays the name of the question group and any instructions defined for the group. The Questions area displays wizard questions. An asterisk (\*) indicates when a question is required; otherwise, you do not have to answer it. A caret (^) indicates a question is navigational, meaning additional questions become available depending on the answers given. You use the **Previous** and **Next** buttons to navigate among question groups.

The **Refresh Document** and **Recreate Document** functions on the Document Management page check to see if responses already exist in the CS\_WIZARD\_BIND record for this wizard. If they do, then the system populates the previous answers before execution. The system verifies the questions and responses when you save the wizard values.

<i>Field or Control</i>	<i>Description</i>
<b>Question Group</b>	Displays the group identifier for the questions that are listed on this page.

<i>Field or Control</i>	<i>Description</i>
<b>Group Instructions</b>	Displays detailed instructions about how you use the wizard and the implication of questions. You define this information when you create the question group, and it cannot be changed.
<b>Previous</b>	Click to return to the previous list of questions. The <b>Previous</b> button is initially disabled if you are on the first question group in a series. If you have more than one page of questions, the system makes the button available on the next page.
<b>Next</b>	Click to go to the next page of questions. The next page might be a continuation of a question group or another question group.
<b>Finish</b>	Click to create the document based on wizard questions and definitions. The system displays the Document Management page, where you can perform other tasks with the document.
<b>Save for Later</b>	<p>Click to save your responses to the wizard questions. The system displays a confirmation page. When you click the <b>OK</b> button, the system saves your responses to this point in the wizard and exits the wizard. The document is not yet created because you have not responded to all of the wizard questions.</p> <p>When you are ready to continue, search for the document and click the <b>Create Document</b> button to continue creating it. The system displays your existing responses. You can page through the wizard to return to the last response. From that point, you can complete the questions and finish the wizard.</p> <p>Click the <b>Cancel</b> button on the confirmation page to return to using the wizard. The <b>Save for Later</b> button is available regardless of the number of questions in the wizard, and is only available for use with document creation wizards.</p>

## Related Links

[Setting Up Question Groups for a Wizard](#)

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## Defining Binds for Wizards

### Page Used to Define Binds for Wizards

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Bind Definition Page</a>	CS_BIND_DEFINITION	Define binds for wizards. See <a href="#">Defining Binds for Wizards Using the Bind Definition Page</a>

## Defining Binds for Wizards Using the Bind Definition Page

Use the Bind Definition page (CS\_BIND\_DEFINITION) to define wizard binds.

Navigation:

**Supplier Contracts > Manage Contract Library > Define Bind Variables**

You use the Bind Definitions page to create bind variables for a wizard. Bind types can be *Transactional* or *Wizard*. The system maps transactional bind variable values to the fields in the purchasing contract or purchase order transaction. When you select a bind type of *Wizard*, the system makes the bind available for use in wizards. The binds will, in turn, either populate content on the resulting document or be used for determining the applicability of rules that drive clause or section inclusion in the document. You cannot interchange the use of transactional and wizard binds because the wizard can only store responses in wizard bind variables. The system provides several additional field types for wizard binds.

A question group in a wizard is required to have at least one defined bind variable field. Binds for use in the wizard are stored in the CS\_BIND record with a CS\_BIND\_TYPE of Wizard=3.

The system provides these wizard binds:

- Check box binds enable you to set up multiple yes/no choices for answers to wizard questions.
- Date binds enable you to use the date as a bind field.

You can also select a format for the date.

- Date/time binds enable you to use the date and time as a bind field.
- Decimal binds enable decimal entries for the bind field.

You can use up to eight decimal places.

- Integer binds enable you to use numeric values in the bind field.

The maximum length for an integer is 23.

- Prompt table binds enable you to specify a predefined table that you can assign to a specific bind.
- String binds enable the use of a string of data.

The length of text string depends on a predefined field length. Lengths can limit characters up to 2, 5, 12, 30, and 254 and a long character. You can also use masked values with string binds with 30 or less characters.

- Yes/no binds enable the use of yes or no answers in the bind field.

See these relate links for more information about setting up binds, such as prompt tables and bind formatting options, for use with wizards:

### Related Links

[Understanding Wizards](#)

[Setting Up Binds](#)

[Setting Up Rules](#)



## Chapter 8

# Creating Authored Documents

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## Understanding Authored Documents

Supplier Contract Management can be used to

- Access the document authoring system, where you can create and maintain authored documents that work with a variety of source transactions.
- Manage the life cycle of an authored document status, version, and amendments.
- Define authored document agreements (deliverables) at the header level and line-item level so that the system uses the related clauses in authored documents.
- Update and monitor authored document header and line agreements to ensure compliance with the source transaction.
- Use source transaction metrics to track and analyze supplier performance.
- Syndicate authored documents to remote systems.
- Notify buyers when authored documents expire, exceed their maximum monetary amount, or exceed their maximum spend threshold monetary amount.

### Related Links

[Understanding How to Create Authored Documents](#)

[Add a Document Page](#)

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## Common Elements Used When Creating Authored Documents

This list provides common terms and definitions used when creating authored document.

<i>Field or Control</i>	<i>Description</i>
Contract Version	Contract versions refer to revisions of a procurement contract. This functionality provides a way to revise a procurement contract as a new draft version while the previous version of the procurement contract is still active within the system and purchasing transactions can be created against it

<b>Field or Control</b>	<b>Description</b>
Authored Document	A textual document created in PeopleSoft Supplier Contract Management that you can base on an ad hoc contract, a PeopleSoft Purchasing contract, a purchase order, or a sourcing event.
Document Version	A separate version control feature provided within PeopleSoft Supplier Contract Management for authored documents. This feature enables you to create new versions of the authored document independent of the transaction.
<b>Source Transaction</b>	This is the basis of the authored document. In most cases PeopleSoft Supplier Contract Management can pull data from a source transaction to display that data in the authored document. Options include purchasing contracts, purchase orders, sourcing events, or ad hoc contracts. With the ad hoc document, there is no separate transaction. Instead, data is pulled from wizard answers.
Transactional Purchase Order	A purchase order that is created and maintained using PeopleSoft Purchasing.
Transactional Purchasing Contract	A contract that is created and maintained using PeopleSoft Purchasing or Supplier Contract Management.  Purchasing contracts are sometime referred to as <i>procurement contracts</i> or <i>purchase order contracts</i> .
<b>RFx Document</b>	The authored document when created using a sourcing event as the source transaction.
Strategic Sourcing Event	A sourcing event that is created and maintained using PeopleSoft Strategic Sourcing.

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## Creating Authored Documents

### Pages Used to Create Authored Documents

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Add a Document Page</u>	CS_DOC_ADD	Create documents for all source transactions.
<u>Create Document Page</u>	CS_DOC_CREATE	Provide additional details when creating documents for all source transactions.



<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Copy Document Page</u>	CS_DOC_COPY_SEC	Copy documents for all source transactions using Document Management.
<u>Import Document Page</u>	CS_DOC_IMPORT	Import documents for all source transactions.

## Understanding How to Create Authored Documents

You can create authored documents to use with purchasing contracts, purchase orders, sourcing event, or as stand-alone ad hoc documents. Creating these types of documents can originate from each source transaction within Supplier Contract Management. The series of pages that you use to create documents is similar for all methods, but some differences exist depending on the source transaction and other values that you select to create the document. You can also import or copy documents.

When adding a document from a source transaction, the system takes you through the same series of steps and pages to create a document:

1. The Add a Document Page or another page that initiates the process.
2. the Create Document Page to add details about the document.
3. Wizard pages that allow you to provide details to appear in the document or control how the document is created.

See Understanding Wizards.

4. The Document Management Page to access to the document and manage other options.

To add documents within the document management system, you can use these methods:

- Add a document for all source transactions using the Add a Document Page.
- Copy a document from another document using the Copy Document Page.
- Import a document using the Import Document Page.

## Understanding How to Copy Documents

Using the Copy Document feature, you can create documents for any source transaction by copying them from existing documents. This saves time when a new document contains the same edits that may have been done on a prior document. The Copy Document Page provides document attributes that you can use to search for existing documents. When searching document types, the search is limited to documents that have the same type that you specify for the document that you are creating. The system does not use a document configurator to build documents that you create when using the copy document method. Instead, it copies the document from the existing authored document and refreshes document content based on the bind variables of the source transaction for the target document.

When using multi-source configurators, the system enables you to copy documents from different source transactions as long as the existing and new documents use the same multi-source configurator within the document type.

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**Note:** You can specify rules within a multi-source configurator to include or exclude content from a document for each source so that the source and target document can include different content. For content that does not change due to rules or refreshed bind information, changing any edits made to the source document are preserved as much as possible in the target.

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**Note:** The system does not copy amendment files or imported documents.

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When you are using the **Copy Document** button on the [Add a Document Page](#), the system provides a convenient method to find and copy an existing document from which you can create a new document. Using the button, you access the [Copy Document Page](#), and search for the document that you want to copy. After retrieving the document, the system displays the [Create Document Page](#) for you to define attributes for the new document.

After you select the document attributes, click the **Create Document** button to create the document. If the current configurator uses a wizard, the system runs the wizard using default values from the corresponding wizard in the document from which you are copying. You can override these values. The system then creates the document and displays the [Document Management Page](#).

## Understanding How to Create Authored Documents from Requisition Wizards

Purchase order documents and purchasing contracts can originate through the requisition process. Before creating either document using this process, requesters can define information that can be used for the contract document. When using requisition documents, requestors can define a related document and wizard responses to capture additional information from a requisition before it becomes a contract. While the requisition document itself does not feed into the contract document, the wizard responses associated with the requisition document can. In addition, you can associate a requisition document to a contract document when you create the contract document.

When you define a document type to be used only with a purchase order requisition, you can specify that the system use this type when a requestor creates a requisition from PeopleSoft eProcurement or Purchasing. In this case, along with the requisition, the requestor can generate a supplemental request document by launching a wizard that captures information pertaining to the contract request.

Wizard responses enables the requestor to provide the required information in the supporting document. After the requisition is awarded to a contract by means of an RFQ or sourcing event, the contract specialist can reference the original request document and use wizard responses within that request document to help drive the content and complete required data on the actual contract. This is possible when you create a contract document and a related requisition exists. The system prompts the contract specialist to select an associated requisition that copies the wizard responses for the requisition document as default values for the new contract document.

---

**Note:** Requisition documents are ad hoc documents that include document contents based on a configurator and responses to wizard questions. The document type that you use with requisitions determines user capabilities, such as editing the requisition document. Within Purchasing and eProcurement requisition components, you can also use the **Attach to Requisition** button to attach a generated document to the requisition along with your comments. Attaching the document to the requisition is performed at a point in time, and the system does not automatically reattach any further changes to the requisition document.

---

Requisition documents are based on document types that allow a purchase order requisition to create a purchase order or purchasing contract document. Documents of this type must be associated with a requisition ID and business unit. Use the [Installation Options - Supplier Contract Management Page](#) to use document types and purchase requisitions. Requisitions depend on a document type and you must indicate that the system uses document types. This enables you to use document types with purchase requisitions. As part of the setup, you should set up a wizard that captures additional information from a requisition and can be used with the purchase order contract.

Use these steps to add a requisition document:

1. Ensure that these options are selected on the [Installation Options - Supplier Contract Management Page](#):

- Use Document Type.
- Use with PO Requisition.

2. Establish wizards and group sections to be used with requisition document types.

This series of questions or question groups should relate to the kind of contracts for which you are creating the document type.

3. Create a document configurator that uses the wizard that you defined for requisitions.

The document configurator also provides the content of the document, such as sections and clauses that provide structure for the wizard responses.

4. Create a document type.

The document type should be an ad hoc type and the **Use Only with PO Requisition** check box should be selected. You can either define a specific configurator or use a configurator selector wizard to select a configurator.

5. Create a requisition in PeopleSoft Purchasing or eProcurement.

6. Click the **Add Request Document** button.

The system accesses the [Add a Document Page](#). This page appears with the business unit, purchase requisition, and a description for the requisition document. You can change the document type that the system uses as a default value. You can also select to import and copy a document to attach to the requisition.

7. Click the **Add a Document** button and complete the wizard questions.

If you are using a configurator selector wizard, the system launches that wizard before launching the document creation wizard. When you finish the questions, the system generates the document and

the [Document Management Page](#) appears. You can view the document, refresh, or re-create it. Other actions available for the document depend on information defined for the document type.

8. (Optional) Click the **Attach to Requisition** button in the Document Management page and enter comments about the document.

This attaches the current document, with your comments, to the requisition instead of manually attaching the document to the requisition. Your comments appear under the **Edit Comments** link for the requisition. You can only attach one version of the document to the requisition at a time.

After creating a requisition document, you can update the responses to the wizard using the **Modify Request Document** button from within PeopleSoft Purchasing or eProcurement requisitions.

## Related Links

[Add a Document Page - Requisition](#)

## Understanding How to Add Ad Hoc Documents linked to Requisitions

When you select a document type on the [Add a Document Page](#) that is used with a requisition, the system updates the page with two fields. This enables you to link to requisitions created in PeopleSoft eProcurement or Purchasing.

Requisition documents define a request document and wizard that capture additional information from the requestor. When you award the requisition to a purchase contract or purchase order and then create a document from that source, you can reference the original request document and use wizard responses within that request document to drive the content and fill in required data for the authored document. The benefit of this process is that by the time the contracting specialist becomes involved in the process, the requestor has already been prompted for and provided all of the necessary information.

Depending on the document type, the system pulls wizard answers from these sources:

- When you create a Purchasing Contract document (from the [Create Document Page](#)) that is associated with a requisition document, the system pulls wizard answers that are associated with sources *All* or *Purchasing Contracts*.
- When you create a Purchase Order document (from the Create Document page) that is associated with a requisition document, the system pulls wizard answers that are associated with sources *All* or *Purchase Orders*.
- When you create an RFX document (from the Create Document page) that is associated with a requisition document, the system pulls wizard answers that are associated with sources *All* or *Sourcing Events*.

---

**Note:** The steps to create an ad hoc document for requisitions are the same as those for stand-alone ad hoc documents, except that you must use a document type that enables you to link to the requisition ID. You can also launch document creation from Purchasing or eProcurement requisition pages.

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If a wizard has been defined for the document type, the system launches the wizard when you click the **Add a Document** button. After you respond to wizard questions, the system creates the document and the Document Management page appears.

If a wizard has not been defined for the document type, the system displays the [Create Document Page](#) Create Document page for you to select a document type. Use this page to define document attributes for the requisition document. You can also import a document to use with the requisition.

---

**Note:** Information that is used for the document is pulled from wizard answers and not the requisition. This is why a requisition is not considered to be one of the four source transactions.

---

### Example: Creating Ad Hoc Documents from Purchasing Requisitions

To create ad hoc documents from a purchasing requisition:

1. Navigate to the Add a Document page.
2. Select Ad Hoc in the Source Transaction field.
3. Enter the SetID.
4. Select Request for Contract in the Document Type field.

---

**Note:** Note that the available fields expand to include **Request BU** and **Requisition ID**.

---

5. Enter an ID in the Ad Hoc ID field or allow the field to default to *NEXT*.
6. Enter the business unit for the requisition.
7. Enter the requisition ID.

The system completes the Description field to access the Create Document page.

8. Click the Add a Document button.

Use the Add a Document page (CS\_DOC\_ADD) to create ad hoc documents and ad hoc contracts from purchasing requisitions using Document Management.

Navigation:

**Supplier Contracts >Create Contracts and Documents >Document Management**

This example illustrates the fields and controls on the Add a Document page for purchasing requisitions.

**Add a Document**

\*Source Transaction  ▼

\*SetID  🔍

\*Ad Hoc ID

\*Request BU  🔍

\*Requisition ID  🔍

\*Description

\*Contract Style  ▼

\*Document Type  ▼

Add a Document
Copy Document
Import Document
Find an Existing Document

<b>Term</b>	<b>Definition</b>
<p><b>Request BU</b> (request business unit)</p>	<p>Select the business unit in which the requisitions exists. This field is only visible when using a document type that is setup to link to an eProcurement or Purchasing requisition.</p> <hr/> <p><b>Note:</b> If you access this page directly from an eProcurement or Purchasing requisition page, the system automatically populates the field.</p> <hr/>
<p><b>Requisition ID</b></p>	<p>Select the requisition to which you want to attach this document. This field is only available when you are using a document type that is setup to use a requisition. When the system creates the document, it provides a link from the Document Management page to the requisition in PeopleSoft Purchasing or eProcurement. In addition, you can access the document in the document authoring system using links from Purchasing or eProcurement requisition pages.</p> <p>After the requisition is approved, buyers can use the document as supplemental information as they progress through the requisition process.</p> <hr/> <p><b>Note:</b> If you access this page directly from an eProcurement or Purchasing application requisition page, the system updates this field.</p> <hr/>

This example illustrates the fields and controls on the Create Document page for a requisition.

### Create Document

[Return to Document Search](#)

Source Ad Hoc

SetID SHARE Ad Hoc ID NDA0018

\*Contract Style Adhoc Document

\*Document Type Request for Contract

Configurator ID REQUEST\_DOCUMENT Request Document

\*Request BU AUS01 \*Requisition ID REQ02

\*Description Request for Requisition ID: REQ02

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\*Administrator VP1 Kenneth Schumacher

Sponsor VP1 Kenneth Schumacher

Department 10000 Human Resources

\*Begin Date 10/07/2018 Expire Date

**Create Document**

**Save**

**Import Document**

[Internal Contacts/Signers](#)

[Document View Access](#)

Use this page to define document attributes for the requisition document. You can also import a document to use with the requisition. See [Creating Authored Documents for Purchasing Contracts](#).

## Add a Document Page

Use the Add a Document page (CS\_DOC\_ADD) to create documents for all source transactions.

Navigation:

**Supplier Contracts >Create Contracts and Documents >Document Management**

This example illustrates the fields and controls on the Add a Document page when Ad Hoc is selected as the source transaction.

### Add a Document

\*Source Transaction Ad Hoc

\*SetID SHARE

\*Ad Hoc ID NEXT

\*Description

\*Contract Style

\*Document Type

**Add a Document**

**Copy Document**

**Import Document**

[Find an Existing Document](#)

Use this page to select a source transaction and enter the key information pertaining to the document to be added. The field order may change based on the source transaction selected.

<b>Field or Control</b>	<b>Description</b>
<b>Source Transaction</b>	<p>Select <i>Ad Hoc</i>, <i>Purchase Order</i>, <i>Purchasing Contract</i>, or <i>Sourcing Event</i>. Depending on the source transaction that you select, either the Contract ID, PO ID, Ad Hoc ID, or Event ID field appears.</p> <hr/> <p><b>Note:</b> For purchasing contract, purchase order, and sourcing event source types, you need to create the transactional data before creating a contract document.</p> <hr/>
<b>Ad Hoc ID</b>	<p>Enter a name for the ad hoc document. This field is only available when you select <i>Ad Hoc</i> in the <b>Source Transaction</b> field.</p>
<b>Contract Style</b>	<p>Select a contract style you want to use for the document. The contract style is linked with the document type and source transaction.</p> <ul style="list-style-type: none"> <li>• Once a style is selected, only Document Types, which have been activated for use with this style, will appear in the document type drop down menu.</li> <li>• When the Source Transaction is a Procurement contract option, then contract style is restricted by that contract format, and cannot be changed.</li> </ul> <p>"Contract Style page" (PeopleSoft Source to Settle Common Information)</p>
<b>Document Type</b>	<p>Select a document type to use with this document. When creating a document the list of valid document types for a user is controlled by the roles associated with the document type on the <a href="#">Document Type Page</a>. If installation options have been set to use the document type, the <b>Document Type</b> field is required. If the <b>Use Document Type</b> installation option has not been selected, the <b>Document Type</b> field does not appear on this page.</p> <hr/> <p><b>Note:</b> If the document is based on a document type that points to a configurator selection wizard to determine which is the best configurator for the document, the system launches the wizard after you click the <b>Add a Document</b> button. These questions guide you when selecting a configurator to use with the new document. When the wizard is complete, the system automatically assigns the configurator ID.</p> <hr/> <p><b>Note:</b> If the document type you are using has the <b>Automatic Document Creation</b> check box selected, then when you click the <b>Add a Document</b> button, the system immediately generates the document using the values specified in the document type and bypasses the Create Document page.</p> <hr/>



<b>Field or Control</b>	<b>Description</b>
<b>Contract ID</b>	Select the purchasing contract for which you want to create a document. This field is only available when you select <i>Purchasing Contract</i> in the <b>Source Transaction</b> field.
<b>Event ID</b>	Select the event from which you want to create a document. This field is only available when you select <i>Sourcing Event</i> in the <b>Source Transaction</b> field.
<b>PO ID</b> (purchase order ID)	Select the purchase order for which you want to create a document. This field is only available when you select <i>Purchase Order</i> in the <b>Source Transaction</b> field.
<b>Description</b>	<p>The Description field is required.</p> <ul style="list-style-type: none"> <li>• If you are creating a purchasing contract document, the system enters the description from the purchasing contract.</li> <li>• If you are creating a purchase order document, the system uses the purchase order ID as the default value for purchase order description.</li> <li>• If you are creating a sourcing event document, the system uses the event name as the default value for the Description field.</li> </ul>
<b>Add a Document</b>	Click to create the document based on a document configurator ID.
<b>Copy Document</b>	Click to access the <a href="#">Copy Document Page</a> and create a new document from an existing document that is in the system.
<b>Import a Document</b>	<p>Click to import a legacy document or a contract.</p> <hr/> <p><b>Note:</b> Depending on user preference settings, this button may not be visible for all users.</p> <hr/> <p>See <a href="#">Importing Documents</a>.</p>
<b>Find an Existing Document</b>	Click to access the Find an Existing Document page to search for existing documents, see <a href="#">Finding Authored Documents in Supplier Contract Management</a> .

## Create Document Page

Use the Create Document page (CS\_DOC\_CREATE) to provide additional details when creating documents for all source transactions.

Navigation:

**Supplier Contracts >Create Contracts and Documents >Document Management.** Click the **Add a Document** button on the Add a Document page.

This example illustrates the fields and controls on the Create Document page for ad hoc sources. This page is similar when other sources are selected. However, variations may exist due to differences specified on the document type.

### Create Document

Source Ad Hoc
[Return to Document Search](#)

SetID SHARE
Ad Hoc ID NDA0020

\*Contract Style

\*Document Type

Configurator ID  Multi Source document for Adhoc and Purchasing Contract

\*Description

---

\*Administrator   Kenneth Schumacher

Sponsor

Department

\*Begin Date   Expire Date

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\*Third Party

Quote Submit Deadline

[Internal Contacts/Signers](#)  
[External Contacts/Signers](#)  
[Document View Access](#)

Use this page to review and enter supplemental information and to create the contract document for ad hoc, purchase orders, purchasing contract, and sourcing event documents.

<b>Field or Control</b>	<b>Description</b>
<b>Contract Style</b>	<p>Select to change the contract style that you entered on the Add a Document page for Ah Hoc documents. If you change this field, it must correspond with the document types that are available. Depending on the type you select, the fields that are displayed on this page might change.</p> <p>You cannot change the contract style for purchase order and purchasing contracts.</p>
<b>Document Type</b>	<p>Select to change the document type that you entered on the Add a Document page. Depending on the type you select, the fields that are displayed on this page might change. This field is only visible if Document Types are enabled.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Configurator Selector</b>	Click to run the wizard that will select the configurator based on the answers to wizard question. The button is only available if document types are enabled and the document type selected is defined to use a configurator selector wizard.
<b>Configurator ID</b>	If you use a document type that has a specific configurator ID defined for it, the system automatically populates the <b>Configurator ID</b> field based on the document type. Or, if you are using a configurator selector wizard, the system populates the field when you complete the configurator selector wizard's questions. The <b>Configurator ID</b> field is only available if document types are not enabled, or if you are using document types and the user has configurator override capability defined on the document type.
<b>Begin Date</b>	For Ad Hoc documents only, this date represents the start date of the document. For example, this might be the begin date of the contract. The system uses this date to determine which effective content to use from the configurator ID when creating the document. The system does not display this date for PeopleSoft Purchasing contract documents. Their begin date is already specified in the contract itself.
<b>Expire Date</b>	For Ad Hoc documents only, this date represents the end date of the document, such as the end date of the contract. The system does not display this date for PeopleSoft Purchasing contract documents. Their expire date is already specified in the contract itself.
<b>Description</b>	<p>The Description field is required.</p> <ul style="list-style-type: none"> <li>• If you are creating a purchasing contract document, the system enters the description from the purchasing contract.</li> <li>• If you are creating a purchase order document, the system uses the purchase order ID as the default value for purchase order description.</li> <li>• If you are creating a sourcing event document, the system uses the event name as the default value for the Description field.</li> </ul> <p>You can override the description.</p>
<b>Cycle Start Date</b>	Displays the current date. Only users who are set up with full document access on their user preferences can override the date. The start date establishes a cycle start date on which to track cycle times for contract document and amendment creation, approval, and execution. Using the cycle start and end dates, you can track documents to ensure that they meet time requirements.

<b>Field or Control</b>	<b>Description</b>
<b>Cycle End Date</b>	<p>Displays the date based on the number of days of cycle time and the cycle calendar that has been set up on the Installation Options page. The system adds the defined cycle time from the start date to arrive at the end date. The system calculates the date using the calendar to only include actual working days. Only users who are set up with full document access on their user preferences can override the date with a new value.</p> <p>You use these cycle dates on the Document Management search results to identify contract documents that have stalled or are not progressing through the collaboration and approval cycle.</p> <p>See Cycle Time Settings on the <a href="#">Installation Options - Supplier Contract Management Page</a>.</p> <hr/> <p><b>Note:</b> When you are creating new documents, user-defined fields appear on the Document Management page. When you are maintaining existing documents, user-defined fields appear on the Document Details page.</p>
<b>Use Wizard Responses from Document</b>	<p>Select to use the responses to a set of wizard questions from another document to create this document. The system displays and uses the responses from the wizard or the original document when the bind variable between the original document's wizard and this documents wizard match. You can override individual responses as you go through the questions. This button is available when you are using document types that have the <b>Allow using wizard responses from a prior document</b> check box selected.</p> <p>You can also use this feature to do general copying of wizard responses from document to document. For example, you might have a contract document containing several wizard responses in it, and wish to create a summary document with only selected key responses from the original document in it. In this case when you add the summary document the system can display the <b>Use Wizard Responses from Document</b> field. Click the <b>Select Document</b> link to select a document and select the contract document. When you create the summary document, the system runs the summary document's wizard and uses the answers from the original contract as default values for the wizard questions.</p>
<b>Select Document</b>	<p>Click to select the document that contains the wizard responses that you want to use. The link becomes available when you select to use wizard responses from another document within the Document Type definition page.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Create Document</b>	<p>Click to create the document. The system initiates the document generation process, expands the configurator, resolves binds and rules, and populates the generation log. If generation errors occur, the system displays a message. When the document is complete, the Document Management page appears with the appropriate buttons and links available for you to begin the document's life cycle.</p> <hr/> <p><b>Note:</b> If the document configurator uses a wizard, the system presents the questions to the document author before generating the document.</p> <hr/> <p>See <a href="#">Understanding Microsoft Word Document Generation and Generating Microsoft Word Documents</a>.</p>
<b>Import Document</b>	<p>Click to import an document that was created outside of Supplier Contract Management. For additional information about importing document, see <a href="#">Understanding Document Import</a>.</p>
<b>Internal Contacts/Signers</b>	<p>Click to access the internal authored document list where you can add internal collaborators and configure the signing settings.</p> <p>See <a href="#">Internal Contacts List Page</a>.</p>
<b>External Contacts/Signers</b>	<p>Click to access the external authored document list where you can add external collaborators, enable supplier portal access, and configure the signing settings.</p> <p>See <a href="#">External Contacts Page</a>.</p>
<b>Document View Access</b>	<p>Click to view or grant access authority to authored documents for user roles and collaborators.</p> <p>See <a href="#">Granting Document View Access</a>.</p>

## Copy Document Page

Use the Copy Document page (CS\_DOC\_COPY\_SEC) to copy documents for all source transactions using Document Management.

Navigation:

**Supplier Contracts >Create Contracts and Documents >Document Management.** From the Add a Document page, click the **Copy Document** button. Select the document from which you want to copy to the new document.

This example illustrates the fields and controls on the Copy Document page.

Copy Contract ID

---

**Document Entry**  
**Copy Document**

SetID SHARE  
Contract ID 0000000000000000000000038      Software Contract

**Document Search**

Contract ID

Supplier Name

Status

Administrator

Description

Master Contract ID

Supplier ID

Department

Sponsor

**Search**

**Select Document**

☰
1-3 of 3

Documents

More Details

Contract Info

Sel	Contract ID	Description	Administrator	Sponsor
<input type="checkbox"/>	POC0074	Financial Software	CROTH	CROTH
<input type="checkbox"/>	POC0075	Security Software	CROTH	CROTH
<input type="checkbox"/>	POC0077	Analytics Software	CROTH	CROTH

You can copy a document that is based on a different source transaction if the document type has been set up to allow copying from a different source transaction. The system determines the document combinations that can be copied by using the setting in the Applicable Sources section of the document configurator. These settings define the other source transactions documents that can be copied for documents that use the configurator.

Use the Document Search section to search for existing documents. The section fields depend on the type of document that you selected on the Add a Document page. The search criteria for ad hoc documents, is related to document attributes defined for a document.

- For purchasing contracts, additional search criteria relates to contract information.
- For purchase order documents, the search criteria relates to purchase order information.
- For RFx documents, the search criteria relates to sourcing event information.

The **Copy From Source** field appears when you are using a document configurator that is defined to use with multiple transaction sources. For example, this allows you to copy a document from an ad hoc document to a purchase order contract document when both documents use the same configurator. In addition, the document type must allow copying from one source to another. However, if a section needs to be changed due to a rule change or perhaps a change to transaction data in a repeating section, then the configurator is used to rebuild that section.

When you select an option in the Copy From Source and select a value in the Supplier SetID field, the system verifies the SetID and business unit corresponding to the ID, and displays only those documents for the copy from source type in the Select Document section.

After you click the **Search** button, the system provides the documents that match the search criteria in the Select Document section. Select the **Sel** (select) check box next to the document that you want to

copy. Use the Documents tab to view basic information about the documents that are retrieved in the search, and use the More Details tab to view the document's status, begin date, and expiration date. You must have security access to the document before you can copy it. The system provides a warning if the document is not in an Approved, Collaborated, Complete, Dispatched, or Executed status, and if a separate amendment exists. Only the latest version of the main contract is copied.

The system performs searches based on matching source transactions, existing authored documents, contract process options, and document types. You cannot copy imported documents unless you are copying from a sourcing event to the awarded contract or purchase order document.

Searches also include the following criteria:

- The document must exist in the system.
- The source transaction must be of the same type, unless you select a multiple source configurator
- Documents returned in the search must match the document type unless you select a multiple source configurator.
- If copying from a document with a different source transaction, then both the 'from and to' documents must use the same multiple source configurator.
- Purchase order contracts, must match the contract process option.

Therefore, if you are searching for a particular contract and the process option does not match, that contract does not appear in the search results.

After you select the document that you want to copy, click the **OK** button. The Create Document page appears with information about the document that you are going to copy and the document you are going to create.

This example illustrates the fields and controls on the Create Document page from a copied document that has a Purchasing Contract document source.

### Create Document

Source Purchasing Contracts
[Return to Document Search](#)

SetID SHARE
Contract ID 0000000000000000000000038

Supplier Waxis Systems

Contract Style Purchase Order

\*Document Type

Configurator ID SOFTWARE CONTRACT
Software Contract

\*Description

---

\*Administrator  Kenneth Schumacher

Sponsor  Calvin Roth

Department  Finance

Cycle Start Date 
Cycle Due Date

---

**Copied From SHARE / POC0074**

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

After selecting the document from which you want to copy, you cannot update the document type or configurator ID, but you can define attributes for the new document. Click the **Create Document** button to complete the copy process. If the document you are copying uses a wizard, the system launches the wizard when you click the **Create Document** button. After the system copies the document, it displays the Document Management page where you can maintain the new document.

---

**Note:** You can specify rules within a multi-source configurator to include or exclude content from the document for each source. This allows the source and target document to have different content. For content that does not change due to rules or refreshed bind information, changing edits made to the source document are preserved as much as possible in the target.

---

**Note:** The system tracks whether a contract was created using the Copy Document page and what contract was used as the source of the copied contract. This can be viewed using the **Document Version History** link on the Document Management page.

---

## Import Document Page

Use the Import Document page (CS\_DOC\_IMPORT) to import documents for all source transactions.

Navigation:

**Supplier Contracts Create Contracts and Documents >Document Management.** Click the **Import a Document** button on the Add a Document page.



Using the Document Management and Contract Entry components, you can import legacy documents or contracts into the document authoring system. Legacy documents are preexisting contracts and documents that were not created in the document authoring system. For example, you can import legacy documents that are still active contracts so that you can collaborate on, approve, and include in document searches if the document format is supported for searches.

For detailed information about this page, see the [Importing Documents](#) topic, and the [Import Document Page](#).

---

## Creating Authored Documents for Purchasing Contracts

### Pages Used to Create Purchasing Contract Authored Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
"Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information)	CNTRCT_HDR	Create purchasing contract documents.
<a href="#">Create Document Page - Purchasing Contract</a>	DOC_CREATE	Create purchasing contract documents.
<a href="#">Copy Document Page</a>	CS_DOC_COPY_SEC	Copy purchasing contract documents to create a new document.
<a href="#">Add a Document Page</a>	CS_DOC_ADD	Create a purchasing contract document. See <a href="#">Add a Document Page - Requisition</a> .

### Understanding How To Create Purchasing Contract Authored Documents

The integration of PeopleSoft Supplier Contract Management with PeopleSoft Purchasing purchasing contracts makes it possible for contract specialists to work directly with documents that are authored and linked to the purchasing contract (Contract Entry) transaction. This topic describes how to add and copy authored documents for procurement contracts.

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**Note:** Tasks described in this topic are similar to many of those described in the [Add a Document Page](#) and [Understanding Document Life Cycles](#) topics. See also [Creating Authored Documents](#).

---

### Creating Authored Documents for Purchasing Contracts

You can create an authored document for a purchasing contract from the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information) by clicking the **Add a Document** button. You can create an authored document for a contract as long as a document does not exist. After creating the authored document, you can maintain it from within the Document Management component, which is also accessible from the Contract Entry component.

To create an authored document for a purchasing contract:

1. Access the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information), enter contract information, and save the contract.
2. Click the **Add a Document** button on the Contract Entry - Contract page.

The system displays the [Create Document Page - Purchasing Contract](#) and populates several fields on the page using values from the contract.

If you create the contract using a request for quote or a strategic sourcing event, and the contract is related to one or more requisitions that have a request-related document, then an intermediate page appears that enables you to select the requisition document that you want to associate with the authored document of the purchasing contract. This enables you to copy requisition-document wizard responses as default value responses in the purchasing contract document wizard. All matching responses, based on wizard variables, between the wizard associated with the requisition request document and the wizard associated with the configurator of the contract document, are copied as default values for the contract specialist.

This process is described in the [Understanding How to Add Ad Hoc Documents linked to Requisitions](#) and the [Add a Document Page - Requisition](#) topics.

3. Enter basic information about the contract on the Create Document page.

If you are using document types, you can refine the document's structure by selecting a document type.

You can import a document that was created outside of the system. After importing the document from this page, the system marks the document as an imported document and displays the [Document Management Page](#). You can use the document authoring system to manage the life cycle of the imported document.

---

**Note:** Ensure that the administrator you select for the contract has also been defined as a document administrator using the "User Preferences - Supplier Contract Management Page" (Application Fundamentals).

---

4. Click the **Create Document** button.

The Document Management page appears with the document in a Draft status.

## Copying Purchasing Contract Documents

When you copy a contract transaction using the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information), the system provides an option to copy the most recent document along with the copied transactional contract. In this case, the new contract document maintains most of the copied content and edits. In addition, the system runs a Refresh process to replace any old bind variables from the old contract, such as supplier information or list of items, with new values from the new contract.

---

**Note:** The option to copy the most recent document along with the copied transactional contract is not available when using the Batch copy method.

---

See also, [Understanding How to Create Authored Documents](#), [Understanding How to Copy Documents](#) and [Copy Document Page](#)

When you copy a contract, and a document exists for the contract that you are copying from, then when you save the new contract, the system displays a page prompting you to copy the document along with the new contract. If you click **Yes**, the system automatically creates the new contract document, and refreshes the binds. If you click **No**, the system does not copy the document.

---

**Note:** When a purchasing contract or purchase order is awarded from a sourcing event, the RFX document can be copied as a starting point for the authored purchasing contract or purchase order document. This capability can be performed when Supplier Contract RFX document capabilities are defined in PeopleSoft Strategic Sourcing using the "Event Summary Page" (PeopleSoft Strategic Sourcing).

---

## Create Document Page - Purchasing Contract

Use the Create Document page (DOC\_CREATE) to create a document for a purchasing contract from the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information).

Navigation:

**Supplier Contracts > Create Contracts and Documents > Contract Entry.** Find an existing purchase order contract. Click the **Add a Document** button to create the purchasing contract document.

This example illustrates the fields and controls on the Create Document for Purchasing contracts.

Create Document		<a href="#">Return to Document Search</a>
Source	Purchasing Contracts	
SetID	SHARE	Contract ID POC0079
Supplier	Contra Costa Communications	
Contract Style	Phase 1	
*Document Type	Standard Contract Document <input type="button" value="v"/>	
Configurator ID	PURCHASES_STD <input type="button" value="Q"/>	Standard document for most Product Purchases
*Description	Installation Service	
*Administrator	CROTH <input type="button" value="Q"/>	Calvin Roth
Sponsor	<input type="button" value="Q"/>	
Department	<input type="button" value="Q"/>	
Cycle Start Date	10/15/2018 <input type="button" value="Calendar"/>	Cycle Due Date 10/19/2018 <input type="button" value="Calendar"/>
<input type="button" value="Create Document"/> <input type="button" value="Import Document"/>		<a href="#">Internal Contacts/Signers</a> <a href="#">External Contacts/Signers</a> <a href="#">Document View Access</a>
<input type="button" value="Save"/>		

See also, [Create Document Page - Purchasing Contract](#) in the Creating Authored Documents topic.

You can create a document for a contract in any status; however the system warns you that in some cases, it might not be appropriate to add a document.

Use this page to define document attributes for the purchasing contract document. If you want to access a document for another purchasing contract, click the **Return to Document Search** link and select the contract ID.

<b>Field or Control</b>	<b>Description</b>
<b>Contract Style</b>	Select a contract style for the document.
<b>Document Type</b>	Select a purchasing contract document type. Only document types that have been defined for use with purchasing contract sources are available in the list. This is a required field and appears when document types have been set for use on the <a href="#">Installation Options - Supplier Contract Management Page</a> . When you select a document type, the <b>Configurator ID</b> field appears depending on how the document type is defined.
<b>Configurator ID</b>	<p>If the document type uses a specific configurator ID, that configurator ID appears by default . You can change this value if you are authorized to override configurator values on the "User Preferences - Supplier Contract Management Page" (Application Fundamentals).</p> <p>If the document type uses a configurator selector wizard, click the <b>Configurator Selector</b> button to run the selector wizard. After you complete the wizard, the system populates the field with the appropriate configurator. If the document type is defined to automatically create a document, the system creates the document when you complete the wizard without returning to this page.</p>
<b>Description</b>	Enter a description for the purchasing contract document. This field is required to create the document.
<b>Use Wizard Responses from Document</b>	Select to use responses from wizard responses contained in another document. This saves time by responding to questions and allows you to change answers if needed. When you select this value, the <b>Import Document</b> button is no longer available.
<b>Select Document</b>	Click to access search criteria for locating another purchasing contract document that contains responses for this wizard.
<b>Create Document</b>	Click to launch the document generation process. If you are using a document creation wizard with the contract, the system launches the wizard.
<b>Import Document</b>	Click to import a legacy purchasing contract document. See <a href="#">Importing Documents</a> .

**Related Links**

[Creating Authored Documents](#)

## Copy Document Page

Use the Copy Document page (CS\_DOC\_COPY\_SEC) to copy existing purchasing contract documents to a new document.

Navigation:

**Supplier Contracts >Create Contracts and Documents >Contract Entry.** After copying a transactional contract and indicating that you want to copy another contract's document, click the **Create Document** button on the Create Document page.

See also, [Copy Document Page](#) in the Creating Authored Documents topic.

When you save a purchasing contract that has just been copied, the system prompts you to also copy the document that exists for the contract you copied. This page appears when you select **Yes** to copy the existing document. The page displays the purchasing contract that you copied to create the current contract. The **Contract ID** field displays the contract you created and the one for which you are creating the document.

---

**Note:** You can also copy a purchasing contract document from within the Document Management component; however, you can't do it in conjunction with copying a purchasing contract.

---

**Note:** You can copy an existing purchasing contract document only when you are using the online copy option. This function is not available using Batch copy.

---

Click the **Create Document** button to launch the generation process. The fields and the behavior of this page are similar to creating ad hoc and purchasing contract document from the Document Management component.

## Add a Document Page - Requisition

Use the Add a Document page (CS\_DOC\_ADD) to add a contract document to a requisition.

Navigation:

**Purchasing >Requisitions >Add/Update Requisitions.** Select a requisition for which you want to create or maintain a document, and click the **Add Request Document** or **Modify Request Document** button on the Maintain Requisitions page.

This example illustrates the fields and controls on the Add a Document page for purchasing requisition documents.

**Add a Document**

Source Transaction Ad Hoc

\*SetID

\*Ad Hoc ID

\*Request BU

\*Requisition ID

\*Description

\*Contract Style

\*Document Type

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

After creating a request and saving a requisition, you can click the **Add Request Document** link on the Maintain Requisitions page in PeopleSoft Purchasing to add a support document for the requisition. A similar link exists for requisitions created using PeopleSoft eProcurement pages. Using these links, you can access the document authoring system, select a document type, and launch a wizard for the requisition. You can apply requisition request documents to both purchase order documents and to purchasing contracts. After answering wizard questions, the system creates the document using your responses. You can also modify the document using requisition pages in Purchasing and eProcurement. See [Understanding How To Create Purchasing Contract Authored Documents](#).

To maintain the contract document in Purchasing, click the **Modify Request Document** link. When requisitions are approved from eProcurement, those requisitions are also available with the requisition document on the Purchasing - Maintain Requisition page. When a requisition from either eProcurement or Purchasing has been awarded as a contract by means of an RFQ or sourcing event, the system can copy the wizard responses for the requisition and forward to the newly generated contract document for any matching wizard values, which serves as a starting point for the contract specialist.

---

**Note:** Within PeopleSoft Strategic Sourcing, you cannot award events that have bid factors with agreements and clauses tied to them to a purchase order document, because the system does not transfer them to the purchase order document. You can award bid factors that have agreements and clauses tied to them only to purchasing contracts.

---

After you create a requisition within eProcurement, you can access the document for maintenance purposes using the **Add a Requisition** link. When you click the **Add a Requisition** link from eProcurement or Purchasing, the Add a Document page appears along with the requisition ID and business unit. Use this page to add a document for a Purchasing or eProcurement requisition request. The page appears with most fields populated using values from the requisition. You can override some of the values, but the **Source Transaction** field value is always *Ad Hoc* for purchase order and purchasing transactional documents.

You can also create requisition documents from Supplier Contract Management, for an existing requisition. The application provides a link to requisitions and business units through which you can search for requisitions. See [Add a Document Page](#).

<i>Field or Control</i>	<i>Description</i>
<b>Document Type</b>	Select the type of requisition document that you want to create. This is a required field. Values available for the field are those document types that have the <b>Use Only with PO Requisitions</b> check box selected on the Document Type page.
<b>Ad Hoc ID</b>	Enter an ad hoc ID. If you setup the document type to use automatic numbering, <i>NEXT</i> appears in the field. When you click the <b>Add a Document</b> button, the system automatically assigns a number.
<b>Add a Document</b>	Click to either launch a wizard that guides you through a series of questions and then creates the document, or to access the Create Document page. Using the page, you can define attributes for the document, then click the <b>Create Document</b> button to create the requisition document.
<b>Copy a Document</b>	Click to copy a document. See <a href="#">Copy Document Page</a> .

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## Creating Contract Documents for Purchase Orders

### Pages Used to Create Contract Documents for Purchase Orders

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Add a Document Page</a>	CS_DOC_ADD	Define creation details for a contract document. Select <i>Purchase Order</i> in the <b>Source Transaction</b> field to add a purchase order document
<a href="#">Create Document Page</a>	CS_DOC_CREATE	Add and update purchase order documents. See <a href="#">Creating Contract Documents for Purchase Orders</a>

### Understanding How to Create Contract Documents for Purchase Orders

Creating contract documents from purchase orders enables you to author contract documents based on purchase orders and express purchase orders, which is an alternative to using a purchasing contract as a source. This functionality is intended for customers who do not use PeopleSoft Purchasing contracts, but want to author a contract document based on a purchase order. When you base a document on a purchase order, the system can use values from that purchase order to process rules and content within the document configurator, or as fill-in-the-blank values for the authored document.

---

**Note:** The authoring process is not intended to fully replace the purchase order dispatch report, which includes many specific calculations and formats. Contract authoring enables you to bind the purchase order data and author a document using content from the clause library. In environments where the purchase order transaction is only being used as an alternative to a contract transaction, this feature provides an optional authoring capabilities for purchase orders.

---

You can create an authored document from purchase orders and express purchase orders from within PeopleSoft Purchasing. You can also create a purchase order document from the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information) by selecting the Purchase Order source transaction and selecting a purchase order ID. Before you can create a purchase order contract document, you must enable transactional sources for purchase orders on the [Installation Options - Supplier Contract Management Page](#).

Authored documents from purchase order source transactions are similar to those for purchasing source transaction documents. For example, you can import a legacy contract to create a purchase order contract the same as you can to create a purchasing contract. Or, you can copy a purchase order document the same as a purchasing contract document.

The similarities and differences to authoring documents using purchase orders include:

- Using a related request document tied to requisitions to capture wizard responses for use with a purchase order contract document that you create later.

See [Using Wizard Responses from Requisition Documents in the Understanding How To Create Purchasing Contract Authored Documents](#) topic.

- Using PeopleSoft Strategic Sourcing, you cannot award events to a purchase order that has bid factors with agreements and clauses tied to them because the system does not support agreement capability for purchase orders as it does for transactional purchasing contracts.
- Performing searches that use purchase order search criteria, and reports that provide purchase order-based contract information.
- Accessing source transaction documents for purchase orders from the supply-side.

As with authored documents related to the transactional contract, you can configure the system to allow for supply-side access (collaboration and signing) of purchase order authored documents.

See [Reviewing and Collaborating on External Documents](#).

- Controlling purchase order document versions.

---

**Note:** Documents that you create, or refresh from purchase orders, are always based on the latest updates to the purchase order. This is the original purchase order or any change orders that have been applied to the purchase order.

---

- Using purchase order workflow, document management workflow, or both.

Depending on organizational requirements, you can configure the system to use the Approval Framework for purchase orders and documents within Supplier Contract Management. You can also define additional workflow configurations within an approval process definition that determine the types of approvals, and when they are needed for the purchase order versus the authored document.

- Copying a purchase order authored document along with copying a purchase order.



When you create a purchase order by copying it from an existing order, the system checks for an existing document for the purchase order. If a document exists, the system displays a message asking you if you would like to copy the document as well.

See "Maintain Purchase Order - Purchase Order Page" (PeopleSoft Purchasing).

- Dispatching attachments for purchase order documents.

As with the transactional purchase contract, you can optionally dispatch (e-mail) related purchase order attachments with the authored document within PeopleSoft Supplier Contract Management.

See [Dispatching Documents](#).

## Validate Purchase Order Contract Documents

When you create a purchase order document, the system verifies that the purchase order can have a document associated with it. The system provides warnings when it detects a problem with associating a document to a purchase order. The warnings do not prevent you from creating the document.

As part of the validations, the system provides warnings when:

- A purchase order line has already been associated with a purchasing transactional contract.

Contract documents should normally be authored from the purchasing transactional contract and not the purchase order, because the purchase order could have lines pointing to multiple purchase order transactional contracts.

- The purchase order is tied to a group purchasing organization (GPO) contract.

Single GPO contracts are set up outside of the Enterprise Resource Planning (ERP) system. These are normally supplier- and distributor-side contracts. Also, each purchase order line could be tied to a different GPO contract as well. An ad hoc contract document would be better to use for creating the initial GPO contract.

- The purchase order is associated with a PeopleSoft Services Procurement-related work order.

If the purchase order is associated to a Services Procurement work order and a purchasing transactional contract is not being used, then the Services Procurement work order would normally serve as the contract.

- The purchase order is subcontracted.

Purchase orders that are subcontracted are likely to have an established contract prior to creating the purchase order from the production ID. This is performed within your manufacturing application

- The purchase order is a drop-ship order.

Drop-ship purchase orders are created using PeopleSoft Order Management and the purchase is typically not a contract. If the purchase order is going to be contract-related, use the purchasing transactional contract at the line level for contract authoring.

- The purchase order is for stockless or consigned items.

Purchase orders for stockless and consigned items are not contract-related or may already have a purchasing transactional contract.

### Map Purchase Order to Authored Document Status

This table provides general guidelines for managing transactions with a specific purchase order status versus a specific authored document status. As is with the transactional contract, the system allows two statuses to function independently to support the need for various transactional related processing independent from authored document and signatures. The mappings include:

<b>Purchase Order Status</b>	<b>Status Description</b>	<b>Typical Authored Status</b>	<b>Comments</b>
Open	This is a new and unapproved purchase order.	Draft to Executed	This represents the initial contract draft.
Pending Approval	The purchase order is in the approval process (optional).	Draft to Executed	
Approved	The purchase order is approved for dispatch or for a change order.	The document has been executed at least once, but could be in the next amendment cycle.	The contract should be executed prior to the purchase order approval.
Dispatched	The purchase order or change order has been dispatched.	The document has been executed at least once and could be in next amendment cycle.	
Open (Reopen for change order)	The change order is in process.	Executed: The system does not change the original document and changes the amendment related to this purchase order.	The contract might require a change depending on the purchase order change.  If an amendment is required first, then you typically amend or execute the document prior to reopening the purchase order for change.
Cancelled	The entire purchase order has been cancelled.	Deactivated	The document was left in last status but marked as Deactive
Complete	The purchase order has been dispatched and closed	Executed or Deactivated	The document was left in it's last status but marked as Deactive.

## Related Links

[Transactional Purchase Orders](#)

## Creating Contract Documents for Purchase Orders

Use the Create Document page (CS\_DOC\_CREATE) to add documents for purchase orders.

Navigation:

**Supplier Contracts >Create Contracts and Documents >Document Management.** Click the **Add a Document** button on the Add a Document page.

Navigation:

- **Purchasing >Add/Update POs > Maintain Purchase Order-Purchase Order.** Click the **Create Document** button on the Maintain Purchase Order-Purchase Order page.
- **Purchasing >Add/Update POs > Express Purchase Order-Purchase Order.** Click the **Create Document** button on the Express Purchase Order-Purchase Order page.

Navigation:

- **Purchasing >Add/Update POs > Maintain Purchase Order-Purchase Order.** Click the **Maintain Document** button on the Maintain Purchase Order-Purchase Order page.
- **Purchasing >Add/Update POs > Express Purchase Order-Purchase Order.** Click the **Maintain Document** button on the Express Purchase Order-Purchase Order page.

For additional information about this page, see the [Create Document Page](#) in the Creating Authored Documents topic.

After creating a contract document for a purchase order, you can manage its life cycle the same as other authored documents using the document authoring system. This page is similar to the page that you use when adding a purchasing transactional contract, but the fields relate to purchase orders.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Source Transaction</b>	Select the <i>Purchase Order</i> source to add a purchase order contract document or to search for an existing purchase order document. The system updates the field names when you make the selection.
<b>Business Unit</b>	Select the business unit from which you want to locate a purchase order.
<b>Document Type</b>	Select the document type that you want to use to create the purchase order document. Only document types that have been created for purchase order contracts appear in the list.

<i>Field or Control</i>	<i>Description</i>
<b>PO ID</b>	<p>Select the purchase order to which you want to associate the contract document. Purchase orders appear based on the business unit that you selected. You can add a purchasing contract document or search for an existing purchasing contract document.</p> <p>If a transactional purchasing contract already exists for lines on the purchase order, the system provides a warning that the document should be authored from that transactional contract and not the purchase order. This is because a purchase order can have lines that are associated with multiple transactional purchasing contracts.</p>

After you define the basic information for the purchase order document, click the **Add a Document** button. The system displays the [Create Document Page](#) where you can define additional details for the document, such as the document type, cycle times, and internal and external contacts. You can also import a legacy document and use it as the purchase order contract document.

## Importing Documents

This topic discusses:

- [Importing Amended Contracts](#)
- [Importing Amended Contracts and Amendments](#)
- [Importing Original Contracts and Amendment Files](#)
- [Importing Previous Document Versions](#)

## Pages Used to Import Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Import Document Page</a>	CS_DOC_IMPORT	Import current document versions, amended contracts, amended contracts and amendments, and original contracts and amendments.
<a href="#">Change Source Transaction Page</a>	CS_DOC_ACTIONS_SP2	Import a preliminary document (such as supplier paper) as an initial ad-hoc document, and when finalized later, relate the document to the related purchasing contract, purchase order, or sourcing event.

## Understanding Document Import

Using the Document Management and Contract Entry components, you can import legacy documents or contracts into the document authoring system. Legacy documents are preexisting contracts and documents that are not created in the document authoring system. For example, you can import a legacy document that is an active contract and perform these tasks: collaborate, approve, and, if the document format is supported by PeopleSoft Search Framework searches, include it in document searches.

You can import documents, change them to a Draft or Executed status, and import additional supplemental files or contracts as attachments for the current executed version. An exception exists for RFX documents, which can be created in Draft, Approved, or Completed status, and additional attachments cannot be imported. For active source transactions, you should import the current, editable, version of the document so that you can edit within the Document Management page and update new versions or amendments of the document. You can import read-only versions, such as a .pdf file; however, to revise the file, you must check out the read-only .pdf file, render a new version of the file from the latest Microsoft Word document, and then check in the newer version of the read-only .pdf file.

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**Note:** Before a document administrator can use the import feature, the administrator must have import document authority which is determined on the "User Preferences - Supplier Contract Management Page" (Application Fundamentals).

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Depending on the type of file that you import, you can view and edit the document using the document authoring system. Examples of documents that you can import are:

- Microsoft Word documents with a variety of extensions, including .doc, .docx, and .xml.
- Microsoft Excel spreadsheets.
- Adobe Acrobat documents (.pdf files).

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**Note:** While the document authoring system creates and processes Microsoft Word documents with .xml extensions, the system does not provide the same level of integration for .xml documents when they have been imported. Microsoft Word .xml files are treated the same as if you imported a .doc file. The system does not recognize them as generated from the Supplier Contract Management application. If you want to use an existing generated .xml contract document as the starting point for a new document, you should use the Copy Document feature from within the Document Management or Contract Entry component. The Copy Document feature enables the reuse of an .xml document and maintains integration between the .xml document and system data, such as bind variables.

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See [Creating Authored Documents](#).

After you import a document, you can manage it through a life cycle similar to those documents created using the authoring system. The import options you select determine available statuses and life-cycle tasks. Most document functions apply to the legacy contracts, except for limitations for refreshing and re-creating documents, the document modification summary, and the generation log. Imported documents cannot use the Refresh and Recreate features intended for generated documents. Imported documents are not parsed as a generated document during check in so that you can identify added, changed, and deleted content within the system.

Also, you cannot use all PeopleSoft Approval Framework features for document approval for legacy documents. Only documents generated by the document authoring system can use the workflow approval to work at the clause level. For example, if a certain clause has changed, you can use the Approval

Framework to notify specific approvers. For imported documents, the **Collaborated On**, **Approved On**, and **Dispatched On** date fields appear as blank on the Document Management page.

You can import the current version of a purchasing contract depending on its status. Amendments are not used with RFx documents. For other sources, if the current version is already in an amendment state, then the previous versions can also be imported as long as the amendment number is unique within a document.

If you are using document types, you need to ensure that the document type is set up so that it is usable with imported documents. For example, the list of values for the imported document status depends on applicable statuses defined on the Document Type page. The settings also affect the import options available to you. For example, if the applicable status is not *Full Life Cycle*, then you can only import the current document. Other import process options will not be available.

You import legacy documents as part of the document creation process.

After importing documents, you can (depending on the transaction source):

- If the document format permits editing, begin using the Document Management component to edit and revise the document, editing the imported draft document, or creating a new amendment for an imported document already in the executed status.

See [Importing Amended Contracts and Amendments](#).

- Add attachments, such as supplement documents to the current version.

See [Viewing and Uploading Attachments and Related Documents](#).

- Change attributes in the document authoring system.
- Import previously executed versions that were not already imported.

Versions that were imported on the initial import page cannot be changed. You can only import previous versions. The Import Document page displays the previous versions that were imported.

- Perform searches for content in imported documents for document types that are supported by the PeopleSoft Search Framework.

After you initially import a document, you can use the **Import Prior Document** button on the Document Management page to import previously amended versions of the contract. This is determined based on the **Amendment** field. For example, if you specify that the current version you are importing is amendment number 5, the system enables you to import up to four earlier amended versions of the document. The content search only searches for the most current amendment of the contract.

## Steps to the Document Import Process

This section provides an example of how you use the import process with legacy contracts. Suppose you have a legacy contract document that you want to track in the document authoring system. You also want to associate the contract with an existing PeopleSoft Purchasing contract.

You begin by accessing the purchasing contract or the Document Management component, and then you:

1. Ensure that user preferences are set up to permit users to import documents.

2. Select to add a purchasing contract document and define the document basic information including the keys to the purchasing contract.
3. Click the **Import Document** button.
4. Define import information, such as the import option, version number, and status date.
5. Upload the document file containing the legacy contract or document.
6. Optionally, and when previous versions are available, upload the file.
7. Import the legacy document and the previous versions you uploaded.

The Document Management page appears so that you can open the document and manage its life cycle.

8. Use the **Import Prior Document** button to import previous versions of the document after it is created in the document authoring system.

### **Related Links**

[Understanding Amendments for Imported Documents](#)

## **Import Document Page**

Use the Import Document page (CS\_DOC\_IMPORT) to import current document versions, amended contracts, amended contracts and amendments, and original contracts and amendments.

Navigation:

- **Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Import Document** button on the Create Document page.
- The Document Management page can be also be accessed by click the Add Document link from one of these pages: Procurement Contract, Purchase order, or Sourcing Event.

This example illustrates the fields and controls on the Import Document Page from the Contract Entry component.

### Import Document

SetID SHARE  
Supplier TRAILBLAZERS

Contract ID 0000000000000000000000098

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\*Document Type Standard Contract Document

Sponsor

\*Administrator VP1 Kenneth Schumacher

Department

Cycle Start Date 06/26/2014 Cycle Due Date 07/02/2014

\*Description Specifications

**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** Personalize | Find | First 1 of 1 Last

Basic Info Details

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document		<input style="width: 50px;" type="text"/>	<span style="border: 1px solid gray; padding: 2px;">▼</span>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<span style="border: 1px solid gray; padding: 2px;">Upload</span>	<span style="border: 1px solid gray; padding: 2px;">Clear</span>

Prior Version is not applicable

Done with Import
Cancel



This example illustrates the fields and controls on the Import Document page from the Document Management component.

### Import Document

SetID SHARE
Ad Hoc ID ADH000000000000000000000001

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Document Type Adhoc Quote Document ▼

Sponsor  🔍

\*Administrator VP1 🔍 Kenneth Schumacher

Department  🔍

\*Begin Date 02/11/2013 📅      Expire Date  📅

\*Description Contract Updates

▼ User Defined Fields

\*Third Party AUSCOMP 🔍

Quote Submit Deadline

Import Option

Current Contract/Document  
(Current Contract/Document with no formal amendments or history to load.)

Current Version Personalize | Find | 📄 | 📅      First ⏪ 1 of 1 ⏩ Last

Basic Info

Details

🔍

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document		1.00	Draft			<span style="background-color: #f4a460; padding: 2px 10px;">Upload</span>	<span style="padding: 2px 10px;">Clear</span>

Use this page to add information about the document that you are going to import.

## Header

The **SetID**, document ID, **Sponsor**, **Administrator**, **Department**, date, and **Description** fields are the same as the fields on the Create Document and the Document Management pages. See [Common Elements Used When Managing Document Life Cycles](#).

## User Defined Fields

This section is available when the document type that you specified has been enabled for user-defined fields. Values in the User Defined Fields section are determined by fields selected on the document type and that have been defined using the User Defined Fields page.

## Import Option

Use this section to select how you want the system to process the imported document. Depending on the option you select, the **Current Version** section changes to display the appropriate fields for each import option. If you enter data and change the import option, the system deletes the data you entered.

When uploading amended versions of contracts, it is important to select the appropriate option depending on how you intend to maintain future amendments for the contract. This is because the option cannot be changed once and amended contract is imported.

**Note:** Amendment options are only available when the document type allows amendments.

<b>Field or Control</b>	<b>Description</b>
<b>Current Contract/Document</b>	<p>Select to import a single contract or document that does not have amendments. This option appears by itself if you are using Document Types and the Document Type's applicable status is set to <i>Draft</i>, <i>Complete Statuses Only</i>, or set to <i>Draft, Approve Statuses Only</i>.</p> <p>When you upload the document, you can set the status to <i>Draft</i>, <i>Completed</i>, <i>Approved</i>, or <i>Executed</i>, depending on the use of a document type and its settings. In <i>Draft</i> status, the <b>Status Date</b> field must have a date less than or equal to today's date.</p>
<b>Amended Contract</b>	<p>Click to import an amended contract. Select this option if, for this contract, you always make amendments to the main contract and never use a separate amendment file. When you select this option, the system prompts you for the Amendment number that represents the current amendment number for this contract. See <a href="#">Importing Amended Contracts</a>.</p>
<b>Amended Contract and Amendment</b>	<p>Click to upload an amended contract as well as an amendment file for the amended contract. In this scenario, you are loading a fully amended main contract file (similar to Amended Contract option) plus a separate Amendment file, which calls out just the changes for this current amendment. See <a href="#">Importing Amended Contracts and Amendments</a>.</p>
<b>Original and Amendment</b>	<p>Click to import an original executed document and an amendment for the document. In this scenario, you have a current and separate amendment file for the original contract, but never modify the original main contract file itself as part of an amendment. See <a href="#">Importing Original Contracts and Amendment Files</a>.</p>

### Current Version - Basic Info

The fields that are available in this section depend on the import option.

<b>Field or Control</b>	<b>Description</b>
<b>Type</b>	Displays the type of file that the system is expecting you to upload as part of this import. For example, whether this is the main contract document or a separate amendment file. Values depend on the import option you selected. For the <b>Current Contract/Document</b> option, the type is <i>Contract Document</i> .
<b>File Name</b>	Displays the name of the file you imported. The field remains empty until you upload the file containing the document or contract. When you upload the file, the file name appears in this field, and you can click the link to view the file.
<b>Version</b>	Enter the version at which you want to import a document. This field is required and can be any value greater than zero. This version number is the same version number the system produces when creating or amending authored documents. This value is not the amendment number.
<b>Status</b> document import statuses	<p>Select the status at which you want to import the documents. Statuses are linked to document types. Values appear in the list of values based on the type of document you are importing. If document types are not selected as an installation option, you can set the status at <i>Draft</i> or <i>Executed</i>. If document types are being used, the list of values depends on applicable statuses defined on the Document Type page.</p> <p>If the applicable status is set to <i>Draft, Complete Statuses Only</i>, then the status value can be either <i>Draft</i> or <i>Complete</i>.</p> <p>If the applicable status is set to <i>Draft, Approve Statuses Only</i>, then the status value can be either <i>Draft</i> or <i>Approved</i>.</p> <p>If the applicable status is set to <i>Full Life Cycle Statuses</i>, then the status can be either <i>Draft</i> or <i>Executed</i>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Status Date</b>	<p>Select a date that you want to use. Status dates are used on the Document Management page to update different values that relate to the status at which you import the document. For example, the system updates the <b>Created On</b> field with the status date you enter when you complete the import.</p> <p>The field is required if it's available, and you cannot enter a date greater than today's date. The system uses the status date value as the date/time value that displays on the Document History page for imported documents.</p> <p>Other values updated on the Document Management page using the status date include:</p> <ul style="list-style-type: none"> <li>• <b>Executed</b> and <b>Executed On</b> date fields when the status is <i>Executed</i>.</li> <li>• <b>Approved</b> and <b>Approved On</b> date fields when the status is <i>Approved</i>.</li> <li>• <b>Completed</b> and <b>Completed On</b> date fields when the status is <i>Complete</i>.</li> </ul>
<b>Status Time</b>	<p>Select a time when you want the status. The field is optional, and the system uses 12:00 a.m. of the status date as the default value if you do not enter a time.</p>
<b>Upload</b>	<p>Click to access the Upload Contract Document page. Then, you can click the <b>Browse</b> button to upload the document or contract file that you want to import from the local system. After you select the file, click the <b>Upload</b> button to load the document into the Basic Info tab.</p>
<b>Clear</b>	<p>Click to delete only the imported files. The system does not delete information in the remaining fields on the Basic Info tab, nor does it delete comments that have been entered on the Details tab.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Done with Import</b>	<p>Click to indicate that you are finished with the document import and are ready to create the document within the Document Management component. The system displays a confirmation message. If you click the <b>Yes</b> button, the system continues to save the imported data. You cannot re-import or make any changes to the data after it is saved.</p> <p>If you click the <b>No</b> button, you can return to the Import Document page and make additional changes. The system informs you when it completes the Save process. After saving the document, the system displays the Document Management page for the document, indicating that the document is imported.</p> <p>The system also provides a variety of messages that assist you in troubleshooting problems when documents fail to import. These messages range from document type requirements to status date requirements and file requirements.</p>
<b>Cancel</b>	<p>Click to cancel the import of a document. The system does not save any of the information you entered for the import. If you are using document types, the system clears the document type and you must enter the document type again on the Create Document page.</p>

### Current Version - Details

Use this tab to enter any comments that you might have about the imported document. The system also displays the comment in the document version history.

## Importing Amended Contracts

Use the Import Document page (CS\_DOC\_IMPORT) to import amended contracts.

Navigation:

- **Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Import Document** button on the Create Document page.
- **Supplier Contracts > Create Contracts and Documents > Contract Entry.** Click the **Add a Document** link on the Contract Entry - Contract page, and then click the **Import Document** button on the Create Document page.

This example illustrates the fields and controls on the Import Document page when you select the Amended Contract option.

### Import Document

SetID SHARE Contract ID 00000000000000000000000000000098  
 Supplier TRAILBLAZERS

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Document Type Standard Contract Document

Sponsor

\*Administrator VP1 Kenneth Schumacher

Department

Cycle Start Date 06/26/2014 Cycle Due Date 07/02/2014

\*Description Specifications

**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** Personalize | Find | First 1 of 1 Last

Basic Info Details

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Amended Contract		<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<span style="border: 1px solid #ccc; padding: 2px;">▼</span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;">Upload</span>	<span style="border: 1px solid #ccc; padding: 2px;">Clear</span>

To specify Prior Versions enter an Amendment number greater than 0 in the Current Version grid.

Done with Import
Cancel

This example illustrates a partial page shot of the fields and controls on the Import Document page for an amended contract with prior versions.

**Current Version** Customize | Find | First 1 of 1 Last

Basic Info Details

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Amended Contract	SHARE_00000000000000000000000000000039_0.00.xml	1.30	<input style="width: 50px;" type="text" value="3"/>	<span style="border: 1px solid #ccc; padding: 2px;">Draft</span> ▼	<span style="border: 1px solid #ccc; padding: 2px;">09/25/200</span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;">Upload</span>	<span style="border: 1px solid #ccc; padding: 2px;">Clear</span>

**Prior Versions (Optional)** Customize | Find | View All | First 1-3 of 3 Last

Basic Info Details

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Amended Contract	<a href="#">Inspection_Clauses_aa.xml</a>	1.20	2	Executed	<span style="border: 1px solid #ccc; padding: 2px;">09/23/200</span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;">Upload</span>	<span style="border: 1px solid #ccc; padding: 2px;">Clear</span>
Amended Contract	<a href="#">Inspection_Clauses2.xml</a>	1.10	1	Executed	<span style="border: 1px solid #ccc; padding: 2px;">09/11/200</span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;">Upload</span>	<span style="border: 1px solid #ccc; padding: 2px;">Clear</span>
Original Contract	<a href="#">Standard_Contract.xml</a>	1.00		Executed	<span style="border: 1px solid #ccc; padding: 2px;">09/02/200</span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;">Upload</span>	<span style="border: 1px solid #ccc; padding: 2px;">Clear</span>

Done with Import
Cancel

An amended contract is one that has been amended but does not exist in the system. You can import the amended contract or document and identify as many other amendments for the contract as you need and place them in the document authoring system.

Use the **Prior Versions (Optional)** grid box to add the original version of the document and the number of amended versions of the file as you want. To specify previous versions enter an amendment number that is greater than zero in the **Current Version** grid box, and tab to another field. Then, expand the **Prior Versions (Optional)** grid box.

The system uses the value that you enter in the **Amendment** field for the current version to determine how many versions of an amended contract that you can upload as previous versions. For example, if you enter 3 in the **Amendment** field, the system automatically numbers two amended contract versions that you can import using the **Prior Versions (Optional)** section.

The system sets the status for all previous versions to *Executed*.

<b>Field or Control</b>	<b>Description</b>
<b>Type</b>	<p>Displays the type of file that the system is going to create upon importing the document.</p> <ul style="list-style-type: none"> <li>• <i>Amended Contract</i>: Appears for the current amended contract. This is the version you are going to upload, and you can select the status at which you want to import it. This option appears in the Current Version section of the page.</li> <li>• <i>Amended Contract</i>: Appears for previous versions with additional rows based on the value you entered in the current version's <b>Amendment</b> field. The system numbers the amendments based on the amendment number you entered. This options appears in the Prior Versions Document section of the page.</li> <li>• <i>Original Contract</i>: Appears for you to upload the original contract. If you do not want to import the original contract, leave the row empty.</li> </ul>
<b>Version</b>	<p>Enter a version number. You can define the version for the current and previous versions of amended contracts and original contract. The version numbers do not have to be chronological; however, if the you've entered a version number, you must either import a version or clear the row.</p>
<b>Status Date</b>	<p>Select a date that you want to use. Status dates are used on the Document Management page to update different values that relate to the status at which you import the document. If you are using document types, these dates depend on the applicable status value for the document type. Ensure that you chronologically order the dates. For example, amendment two must be dated previous to amendment three. You can also use the <b>Status Time</b> field to further define the date chronology.</p>

## Related Links

[Understanding Contract Document Amendments](#)

## Importing Amended Contracts and Amendments

Use the Import Document page (CS\_DOC\_IMPORT) to import amended contracts and amendments.

Navigation:

- **Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Import Document** button on the Create Document page.
- **Supplier Contracts > Create Contracts and Documents > Contract Entry.** Click the **Add a Document** link on the Contract page, and then click the **Import Document** button on the Create Document page.

This example illustrates the fields and controls on the Import Document page when you select the Amended Contract and Amendment option.

### Import Document

SetID SHARE

Supplier TRAILBLAZERS

Contract ID 0000000000000000000000000098

---

Document Type Standard Contract Document

Sponsor

\*Administrator VP1 Kenneth Schumacher

Department

Cycle Start Date 06/26/2014 B1      Cycle Due Date 07/02/2014 B1

\*Description Specifications

**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** Personalize | Find | | First 1-2 of 2 Last

Basic Info | Details | [...]

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Amended Contract		<input style="width: 50px;" type="text"/>		<span style="border: 1px solid gray; padding: 2px;">▼</span>	<input style="width: 50px;" type="text"/> <span style="font-size: small;">B1</span>		<span style="border: 1px solid gray; padding: 2px;">Upload</span>	<span style="border: 1px solid gray; padding: 2px;">Clear</span>
Amendment File			<input style="width: 50px;" type="text"/>				<span style="border: 1px solid gray; padding: 2px;">Upload</span>	<span style="border: 1px solid gray; padding: 2px;">Clear</span>

To specify Prior Versions enter an Amendment number greater than 0 in the Current Version grid.

Done with Import
Cancel



This example illustrates the fields and controls on the Import Document page for an amended contract and amendment with prior versions.

Current Version									
Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear	
Amended Contract	<a href="#">Standard_Contract_Support.xml</a>	3.00		Draft	09/28/200		Upload	Clear	
Amendment File	<a href="#">Inspection_Clauses.xml</a>		2				Upload	Clear	

Prior Versions (Optional)									
Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear	
Amended Contract	<a href="#">SHARE_000000000000000000000000000039_0.00.xml</a>	2.00	1	Executed	09/23/200		Upload	Clear	
Amendment File	<a href="#">Standard_Contract.doc</a>		1				Upload	Clear	
Original Contract	<a href="#">Inspection_Clauses_aa.xml</a>	1.00		Executed	09/02/200		Upload	Clear	

Use this page to import an existing amended contract version with additional amendment files. The current version displays with two rows that include a paired amended contract and amendment file. You must upload both the amended contract and amendment file, and if you upload previous versions of the amended contract, they must be uploaded as pairs. You can also upload the original contract.

**Note:** The behavior of the fields on this page is similar to uploading amended contracts.

Field or Control	Description
Type	<p>Displays the type of file that the system is going to create upon importing the document.</p> <ul style="list-style-type: none"> <li><i>Amended Contract:</i> Appears for the current amended contract. This is the version you are going to upload, and you can select the status at which you want to import it. The <i>Amended Contract</i> also appears as the type for previous versions with additional rows based on the value you entered in the current version's <b>Amendment</b> field. The system numbers the amendments based on the amendment number you entered.</li> <li><i>Amendment File:</i> Based on the Amendment number entered, the system creates amended contract and amendment file pairs that you can upload.</li> <li><i>Original Contract:</i> Appears as a previous version type for you to upload the original contract. If you do not want to import the original contract, leave the row empty.</li> </ul>

## Importing Original Contracts and Amendment Files

Use the Import Document page (CS\_DOC\_IMPORT) to import original contracts and amendments.

Navigation:

- **Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Import Document** button on the Create Document page.
- **Supplier Contracts > Create Contracts and Documents > Contract Entry.** Click the **Add a Document** link on the Contract page, and then click the **Import Document** button on the Create Document page.

This example illustrates the fields and controls on the Import Document page when you select the Original and Amendment option.

### Import Document

SetID **SHARE** Contract ID **00000000000000000000000000000098**

Supplier **TRAILBLAZERS**

---

Document Type Standard Contract Document

Sponsor

\*Administrator VP1 Kenneth Schumacher

Department

Cycle Start Date 06/26/2014 Cycle Due Date 07/02/2014

\*Description Specifications

**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** Personalize | Find | First 1-2 of 2 Last

Basic Info | Details

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Original Contract		<input type="text"/>		Executed	<input type="text"/>	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="Clear"/>
Amendment File		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="Clear"/>

To specify Prior Versions enter an Amendment number greater than 0 in the Current Version grid.

This example illustrates the fields and controls on the Import Document page for an original contract and amendment files with prior versions.

**Current Version** Customize | Find | First 1-2 of 2 Last

Basic Info | Details

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Original Contract	<a href="#">Standard_Contract.doc</a>	<input type="text" value="1.00"/>		Executed	<input type="text" value="09/11/2001"/>	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="Clear"/>
Amendment File	<a href="#">Standard_Contract_Support.xml</a>	<input type="text" value="2.00"/>	<input type="text" value="3"/>	<span style="border: 1px solid gray; padding: 2px;">Draft</span>	<input type="text" value="09/18/2001"/>	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="Clear"/>

**Prior Versions (Optional)** Customize | Find | View All | First 1-2 of 2 Last

Basic Info | Details

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Amendment File	<a href="#">SHARE_00000000000000000000000000000039_0.00.xml</a>	<input type="text" value="3"/>	<input type="text" value="2"/>	Executed	<input type="text" value="09/24/2001"/>	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="Clear"/>
Amendment File		<input type="text"/>	<input type="text" value="1"/>	Executed	<input type="text"/>	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="Clear"/>

Use this page to import both an original contract and an amendment file. You can also import previous versions of amendments. If you specify a different version and status date for the original contract, the system creates a separate row in the CS\_DOC\_HDR\_HIST record with information from the original row. If you do not specify a version or date for the original contract, then the system creates the original row with the same version and date as the amendment file.

The **Version**, **Amendment**, **Status**, and **Status Date** fields are required for the amendment file. Both the original contract and the amendment file must be uploaded.

Based on the amendment number you enter, the system creates amendment file rows that you can upload as previous versions.

---

**Note:** The behavior of the fields on this page are similar to uploading amended contracts.

---

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Type</b>	<p>Displays one of these options:</p> <ul style="list-style-type: none"> <li>• <i>Original Contract:</i> Appears as the current version with an executed status.</li> <li>• <i>Amendment File:</i> Appears as the current version without a preassigned status. If you enter an <b>Amendment</b> field value greater than one as the current version, the system provides the appropriate rows in the <b>Prior Versions (Optional)</b> grid box, and sets the status to <i>Executed</i>.</li> </ul>

## Importing Previous Document Versions

Use the Import Document page (CS\_DOC\_IMPORT) to import previous document versions.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Import Prior Document** button on the Document Management page.

This example illustrates the fields and controls on the Import Document page.

**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.)

**Amendment Option:** Amend Contract Only

Any editable rows represent prior document versions that are missing in the system based on amended versions that were originally specified and imported. If all rows are gray then all amendment history has been previously imported.

**Current Version** Customize | Find | [Grid Icon] | First 1 of 1 Last

Basic Info | Details | [Filter Icon]

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Amended Contract	<a href="#">Standard_Contract.xml</a>	3.00	2	Draft	09/25/2009	12:00AM	<input type="button" value="Upload"/>	<input type="button" value="Clear"/>

**Prior Versions (Optional)** Customize | Find | View All | [Grid Icon] | First 1-2 of 2 Last

Basic Info | Details | [Filter Icon]

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Amended Contract		<input type="text"/>	1	Executed	<input type="text"/> [B]	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="Clear"/>
Original Contract		<input type="text"/>		Executed	<input type="text"/> [B]	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="Clear"/>

The **Import Prior Document** button provides a way to use the Document Management page to import a previous version of a document after you have imported an amended contract. The button is only available when you have an imported document and the amendment is at a version number that is greater than 1. You use this page similar to how you import previous versions when you initially import a document.

---

**Note:** If you re-create an imported document, you cannot import previous versions for the document. You must import additional previous versions of the document before re-creating the document.

---

### Current Version

If a previous version has already been uploaded, the system displays that information in this section. You cannot change the information. The system also displays the most recent status for the version or amendment. Therefore, if a file was initially imported in a *Draft* status and subsequently executed, then the **Status** is changed to *Executed*.

When you click the **Done with Import** button, the system performs the same validations and processes as it does for previous versions when you import a document while creating a document. If all previous versions exist and there are no files to upload, then the **Done with Import** button is not available.

### Prior Versions Optional

This section displays information about the previous version that you are going to upload and then import.

<b>Field or Control</b>	<b>Description</b>
<b>Type</b>	Displays the type of imported document the system will create for the previous version. The system uses the CS_DOC_HDR.CS_TWOFIELD_AMEND and CS_DOC_HDR.CS_AMENDMENT record fields to determine if previous versions are available and the type of documents that they will be.
<b>Status Date</b>	Select a date. The date for an earlier amendment must be earlier than the date for the next amendment. The system processes previous versions in chronological order.

## Change Source Transaction Page

Use the Change Source Transaction page (CS\_DOC\_ACTIONS\_SP2) to import a preliminary document (such as supplier paper) as an initial ad-hoc document, and when finalized later, relate the document to the related Purchasing Contract, Purchase Order, or source event.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Change to New Source** button on the Document Management page.

This feature is only available for ad hoc documents that have been imported. It allows you to import a preliminary document such as supplier document as an initial ad-hoc document. Then, when finalized, you can relate the document to the related purchasing contract or purchase order.

After importing an ad hoc document, you can change it to a purchase order, a purchasing contract, or a sourcing event type of document. This change is permanent and after you make the change, the **Change to New Source** button is no longer available. You can enter comments about the change and save your changes by clicking the **OK** button.

<b>Field or Control</b>	<b>Description</b>
<b>Source Transaction</b>	Select a new source transaction type. Values include <i>Purchasing Contracts</i> , <i>Purchase Orders</i> , and <i>Sourcing Events</i> .
<b>Document Type</b>	Select the document type that you want to control the processing of the imported document. Values for the field depend on the document types that are available for the source transaction you selected.
<b>Business Unit and Purchase Order</b>	These fields become available when you select <i>Purchase Order</i> in the <b>Source Transaction</b> field.
<b>Business Unit and Event ID</b>	These fields become available when you select <i>Sourcing Events</i> in the <b>Source Transaction</b> field.

<b>Field or Control</b>	<b>Description</b>
<b>SetID and Contract ID Order</b>	These fields become available when you select <i>Purchasing Contracts</i> in the <b>Source Transaction</b> field.

## Running Contract Release Processes for Purchasing Contracts

Supplier Contract Management uses the purchase order sourcing business process to stage and source contract releases into purchase orders and vouchers. The process creates purchase orders from contract item requests loaded into PeopleSoft Purchasing staging tables.

### Related Links

"Understanding the Purchase Order Sourcing Business Process" (PeopleSoft Purchasing)

## Pages Used to Run Contract Release Processes for Procurement Contracts

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Stage Contract POs Page</u>	RUN_PO_POCTRCT	Stage contract releases to create purchase orders.
<u>PO Auto Sourcing - Objectives Page</u>	RUN_PO_AUTOSRC1	Source purchase orders automatically.
<u>PO Calculations - Run Controls Page</u>	RUN_PO_POCALC1	Run the Purchase Order Calculations process.
<u>PO Creation - Create PO Page</u>	RUN_PO_POCREATE	Create purchase orders using staging table data.
<u>Sourcing Workbench Page</u>	PO_SRC_ANALYSIS	View and update purchase orders in staging tables.

### Stage Contract POs Page

Use the Stage Contract POs page (RUN\_PO\_POCTRCT) nter the selection criteria for the PO Calculations process (RUN\_PO\_POCTRCT) and to run the process to stage contract releases to create purchase orders.

Navigation:

**Supplier Contracts > Contract Release Processes > Stage Contract POs**

### Related Links

"Stage Contract POs Page" (PeopleSoft Source to Settle Common Information)

## PO Auto Sourcing - Objectives Page

Use the PO Auto Sourcing - Objectives page (RUN\_PO\_AUTOSRC1) to select the sources for generating purchase orders to configure the Automatic Purchase Sourcing process (PO\_AUTO\_SRC) to run multiple jobs in sequence for the same set of staging records.

Navigation:

**Supplier Contracts > Contract Release Processes > PO Auto Sourcing**

### Related Links

"Using the Automatic Purchasing Sourcing Process" (PeopleSoft Purchasing)

## PO Calculations - Run Controls Page

Use the PO Calculations - Run Controls page (RUN\_PO\_POCALC1) to create a tentative purchase order header, line, and schedule to build final purchase orders. You can enter the run control criteria for the PO Calculations process (PO\_POCALC) and run the process.

Navigation:

**Supplier Contracts > Contract Release Processes > PO Calculations**

### Related Links

"Running the PO Calculations Process" (PeopleSoft Purchasing)

## PO Creation - Create PO Page

Use the PO Creation - Create PO page (RUN\_PO\_POCREATE) to enter the selection criteria for the Create Purchase Orders process (PO\_POCREATE) and to run the process. You can also define creation options, including calculating purchase order line numbers, holding from further processing, and enabling dispatch when the purchase order is approved.

Navigation:

**Supplier Contracts > Contract Release Processes > PO Creation**

### Related Links

"Creating Purchase Orders Using the Create Purchase Orders Process" (PeopleSoft Purchasing)

## Sourcing Workbench Page

Use the Sourcing Workbench page (PO\_SRC\_ANALYSIS) to view and update purchase orders in staging tables.

Navigation:

**Supplier Contracts > Contract Release Processes > Sourcing Workbench**

The Sourcing Workbench component provides you with a view of the results of each sourcing step. The Sourcing Workbench enables you to view staged rows, along with any errors accompanying them. You can also select sourcing criteria, view the rows of data on the PO\_ITM\_STG table, and access pages to change the recommended supplier, change quantities sourced to each supplier, or correct errors.

**Related Links**

"Using the Sourcing Workbench" (PeopleSoft Purchasing)

**Accessing Related Links for Supplier Contracts**

Related links enable access to Purchasing features that can help you create and maintain contracts in Supplier Contract Management.

**Pages Used to Access Related Links for Supplier Contracts**

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
"Identifying Information Page" (PeopleSoft Source to Settle Common Information)	VNDR_ID1	Define supplier information, including supplier name and short name, classification, status, persistence, withholding and value-added tax eligibility, relationships with other suppliers, duplicate invoice checking settings, and additional elements required for reporting to government agencies.
"Item Categories - Category Definition Page" (PeopleSoft Purchasing)	CATEGORY_TBL	Define item categories that can provide transaction information for requisitions, requests for quotes, contracts, and purchase orders. Item categories also serve as the organizational unit for item catalogs. Item catalogs are a collection of item categories.
"Define Item - General: Common Page" (PeopleSoft Managing Items)	INV_ITEMS_DEFIN1	Define an inventory item at the SetID level. This definition should include information about the item such as its classification, substitutes, status, and dimensions.
"Purchasing Attributes Page" (PeopleSoft Purchasing)	ITM_TBL_PUR	Select to enter basic purchasing information for an item. This information can include item attributes, purchasing controls, and item supplier information.



<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
"Maintain Purchase Order - Purchase Order Page" (PeopleSoft Purchasing)	PO_LINE	Select to enter or change purchase order information. For example, you can change default values, header details, and activities; add items to the purchase order; and update ship dates.



# Managing Contract Agreements

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## Understanding Contract Agreements

### Contract Agreements and Contract Compliance

An agreement is a negotiated set of conditions in a contract. The agreement spells out the conditions and terms that apply to the contract. The PeopleSoft Supplier Contract Management system is used to monitor and validate agreements. Agreements are assigned through PeopleSoft Strategic Sourcing bid factors and Purchasing contract maintenance. This formal tracking process makes it possible for you to ensure that a supplier is in compliance with the agreements in a contract. Agreements are also known as service level agreements (SLAs) and can be created for specific items in a contract (line agreement), for a contract in general (header agreement), and for a group of items (category agreements).

Contract *terms* that reference the contract cannot be measured by the data that is captured on a traditional purchase order, receipt, and voucher transaction. These contract terms are considered *nontransactional agreements*. An example might be that work can only be performed during daylight hours or that site grading must meet certain standards. Within the contract management system, a more generic structure exists for measuring the milestones and compliance factors of nontransactional agreements. This structure is more practical for monitoring and tracking the performance of the supplier against the contract.

An agreement can contain a list of interested parties and a target date for notifying the parties about the contract header, line, or category agreement. You can set up notifications for completion, changes in the status, passing a target date, or reminder days. Notifications can be directed to suppliers, internal users, or both.

Agreements can also have clauses assigned to them. After you create agreements, you can use the document authoring system to manage documents that were created to support the agreement. When monitoring agreements, the system manages step verification requirements and the individuals who are responsible for monitoring the agreements. The system notifies individuals using e-mail when an action, such as a scheduled performance review, is needed.

You can specify that related files need to be created and attached to a contract record. For example, a contract might state that to receive final payment, the supplier must certify that they have returned all company-furnished equipment and intellectual property. You can create a clause that requires the system to attach a certification file to the contract and store it in the system. This action not only helps maintain compliance with the contract, but it also helps to uncover cost savings that may not have been realized.

Contract compliance is divided into two parts. The first part involves predefining agreements and assigning agreements to purchasing contracts. The second part is monitoring and analyzing compliance of agreements.

### Related Links

[Understanding Agreement Metrics](#)

[Predefining Agreements](#)

[Assigning Agreements to Purchasing Contracts](#)  
[Reviewing and Updating Contract Agreement Statuses](#)  
[Updating Contract Procurement History](#)  
[Monitoring Agreement Compliance](#)

## Agreement Use

For each agreement, you can define the verification requirement, whether the agreement is compliant with the terms of the contract, as well as when and who to notify when a compliance date is approaching or has passed. Additionally, agreements might have one or many clauses to which they are associated. When you specify agreement codes on a contract or when a PeopleSoft Strategic Sourcing event is awarded and posted to a contract, the system provides the agreement information to the contract.

PeopleSoft Strategic Sourcing supports the mapping of bid factors to one or more agreements and the passing of selected negotiated terms into the awarded contract as agreements. If a sourcing event is awarded to a contract and a bid factor on the event has one or more agreements with which it is associated, the system adds those mapped agreements to the awarded contract. If, however, the system does not map agreements to a bid factor and you want to carry the negotiated terms into the contract, you can create an ad hoc agreement for the contract using the bid factor information and responses. You can also manually add a predefined agreement to the contract. In all cases, you can define additional information that relates to the agreements for that particular contract or delete information that is not pertinent to the agreement.

After a contract is approved, you can record the result of the contract activities and the agreement verification information, and indicate whether the agreement is compliant. After tracking the compliance of an agreement, you can review the activity and status, and manually release adjustment vouchers for any bonuses or penalties incurred.

---

**Note:** Sourcing events can be awarded to procurement contracts or purchase orders. Agreements are part of procurement contracts and not purchase orders. Therefore, if a sourcing event is awarded to a purchase order, the system ignores agreements of the event.

---

## Agreement Management

Agreement management enables you to monitor, update, and review header, line, and category agreements as well as their verification steps, statuses, and workflow notifications. You can assign agreement verification steps (deliverables) for internal and external parties. When using the steps externally, you can choose to have the supplier notified using e-mails that contain URLs. The URLs provide external parties access to the supplier facing portal so they can review and update deliverables online.

For additional information about URLs, see [External Users and Document Collaboration](#) and [Understanding Contract Deliverable Verification Steps](#).

After assigning agreements to a contract, the Agreement Management feature can be used to indicate whether a verification step is in process, has been completed successfully, and whether the agreement met compliance requirements.

You can define agreements so that they are manually updated by users. In addition, Supplier Contract Management provides predefined metric-related agreement capabilities so that the system can calculate

how the supplier is performing on a particular contract in terms of quality, on-time deliveries, and quantity performance for purchase orders related to the contract. The tracking of agreements is optional.

---

**Note:** Agreement management does not include clause or document approvals, or collaboration that you might need to perform for the agreement document.

---

When agreements and associated verification steps are assigned to a contract, the system can send workflow notifications to interested parties when approaching a due date and when an action must be completed. This can include securing documents, getting confirmation of an agreed upon date, or completing necessary inspections. You can track the progress of each step using the Update Agreement Statuses component, which enables the owner of the verification step to indicate that verification is in process, has been completed, or has failed. After the verification steps have been completed, whether successfully or not, the contract administrator can indicate whether the supplier, or internal party, has met the terms of the agreement.

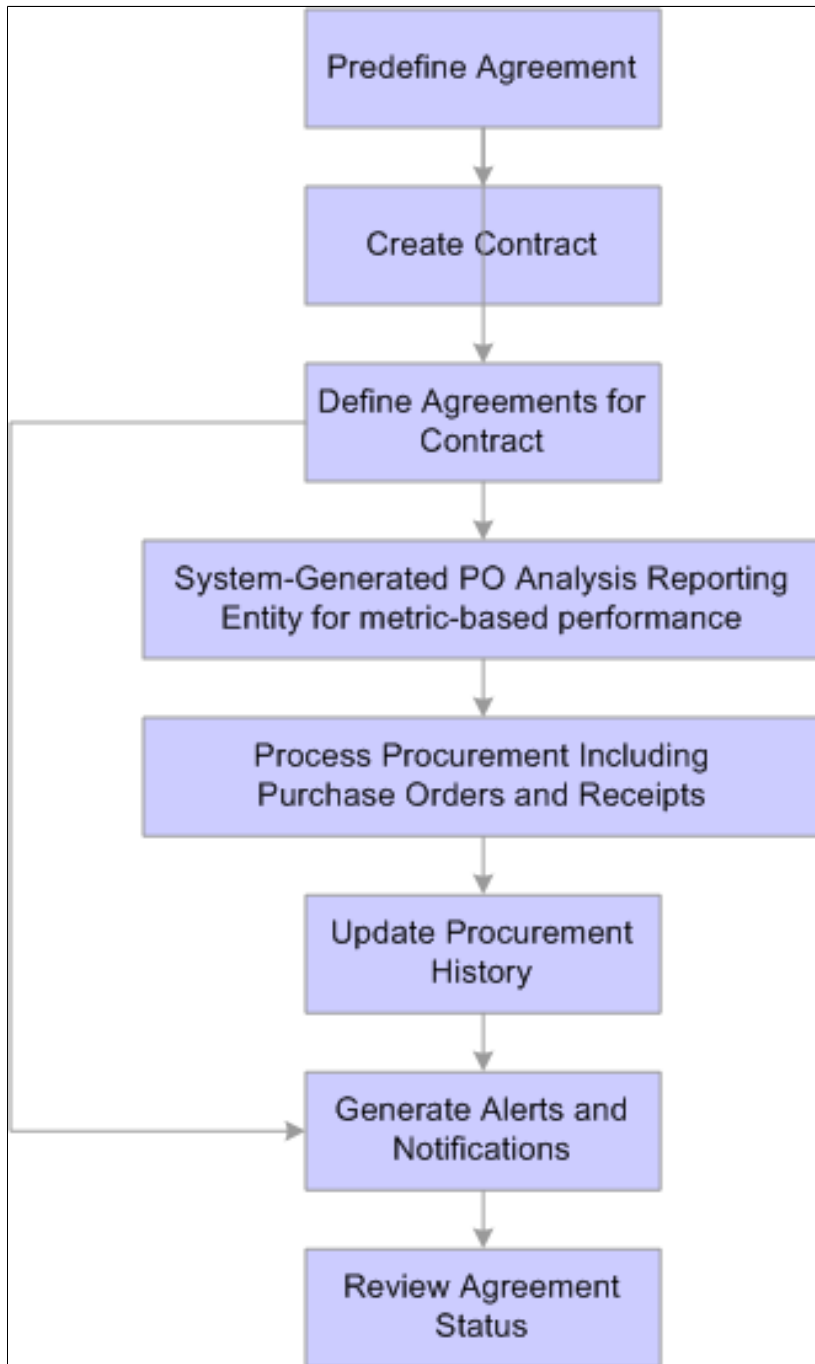
Agreement management also provides a quick and easy method to check agreement and verification step statuses. Using the Monitor Agreement Compliance component, you can see a summary view of selected contracts with designations for agreements that are, or are not, in compliance. A summary of the verification steps are displayed, along with their respective status of not started, in process, completed, or failed. From this summary view, you can drill into the details of the verification steps or agreements by selecting the link in the various status columns.

To view the agreement and verification step details of a single contract, use the Review Agreement Status inquiry. This inquiry is useful for those individuals who don't necessarily need to update statuses or monitor progress, but would like to view the details of agreements associated with a contract.

Contract agreement compliance is divided into two parts. The first involves predefining agreements, bid factor agreements, and assigning agreements to purchasing contracts. The second part is updating, monitoring, and analyzing compliance against agreements.

### Example: Contract Agreement Process Flow

This diagram illustrates the process flow for contract agreements.



To create and use agreement compliance metrics, use these steps:

1. Create an agreement use the Contract Agreement Definition Page and using any result type.
2. Create a procurement contract using the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information).
3. Establish an agreement for the agreement code that you created in step 1, for the contract created in step 2 using the Contract Header Agreement Assignments Page.

4. If the agreement used in step 3 is metric based, auto numbering and a reporting entity must be established for it to be processed.

Set up auto-numbering and a reporting entity reference using the Supplier Performance Setup page (Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Supplier Performance Setup).

5. Create purchase orders for the contract created in step 2, and receive the purchase orders.
6. Run the Procurement History Update process using the [Update Procurement Info Page](#).

Make sure that you run the process from within Update Procurement Info component in Supplier Contract Management.

7. Run the Workflow Notification (CS\_NOTIFY\_WF) process as needed to generate e-mail and worklist notifications.

The system notifies interested parties defined in notifications when an supplier has an unacceptable performance or a warning performance against a contract agreement. Ensure that the **Warning & Unacceptable Performance** check box is selected on the Process Notifications page.

8. Access the [Update Agreement Statuses Page](#) to review the **Cumulative Performance** value.

This value provides an overview of the most up-to-date metric cumulative-performance percentages against this contract. The value is based on the current run of the Procurement History Update process for this contract.

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**Note:** Click the **Cumulative Performance** value to review supplier performance information. This link accesses the View Supplier Shipment Performance page. You use the page to compare actual performance against target performance. You can also navigate to item details and review receipt information.

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## Related Links

[Reviewing and Updating Contract Agreement Statuses](#)

[Monitoring Agreement Compliance](#)

[Understanding Contract Agreements](#)

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# Understanding Agreement Metrics

## Metric Measurements

Supplier Contract Management uses procurement history from PeopleSoft Purchasing to gather transactional agreement compliance information. This enables you to use summaries of purchasing, invoicing, and receiving transactions to measure the performance of the supplier and their compliance to a contract agreement. The procurement history also provides information about procurement trends and can assist you when managing supplier relationships.

To compare the actual performance of a supplier with the performance defined in a contract agreement, the system uses underlying metrics as the basis for evaluating whether the agreement has been met. After running the metric process for procurement history, the system calculates agreement compliance for contracts included in the run. When you define an agreement, you also establish a negotiated result

and performance tolerance value. The metric ID determines the meaning of these values. For example, if the Metric ID value is *On-time Receipt Performance*, the negotiated result amount represents the target percentage for on-time receipts, and the tolerance percentage can represent an acceptable level of performance. Any percentage below the allowed tolerance is considered unacceptable.

In addition, you can set up notifications to alert buyers when an agreement reaches a warning, or unacceptable, tolerance level. Interested parties are notified, such as contract managers and buyers, when the performance of a supplier needs to be examined, or when the performance is unacceptable. You set up the notification process for warnings using the [Agreement Notification Page](#).

Supplier Contract Management pages can be used to view summarized performance details and measurements for agreements, and to view the acceptable, warning, or unacceptable performance levels for those agreements. You can view the actual performance metric percentage using the "View Supplier Shipment Performance Page" (PeopleSoft Purchasing). The system provides additional performance data along with charted summarizations of the data. Chartist data by period includes:

- Acceptable percentages.
- Warning percentages.
- Unacceptable percentages.
- Variance percentages, such as over and under and early and late percentages.

Agreements are set up to use metric measurements when you define agreement codes on the [Contract Agreement Definition Page](#). When you select *Metric* as a result type, you also select the type of measurement (metric ID) that you want to use along with tolerance percentages. You can measure performance based on these metric measurements:

- On-time performance by receipt.
- On-time performance by quantity.
- Quantity performance.
- Purchase order and receipt quantity performance.
- Quality performance.

An example of using a metric agreement might be when a contract includes an agreement that specifies that the supplier should deliver 95 percent of its shipments on time by aggregate receipt quantity. Therefore, by tracking the performance of a supplier over time, if the supplier fails to meet the 95 percent target over the life of the contract, the contract manager may not want to renew the supplier's contract. The metric provides the information needed to make this decision.

Another example might be when the contract manager wants to track the performance of a supplier on a regular basis. The manager can set up an agreement with a deliverable for on-time performance and track the performance on a daily, weekly, or monthly basis. The system periodically checks the on-time performance metric for the contract and issues an e-mail and worklist alert to the manager, or verification step owner, if the performance falls below the agreed upon 95 percent threshold. The manager can then contact the supplier or take appropriate action. By evaluating the receiving data and then notifying the interested party, if the supplier is not compliant, it becomes easier for contract managers to manage performance on an exception basis.



## Metric Measurement Types

Use the [Contract Agreement Definition Page](#) to define agreement codes with metrics. You select to measure the performance against a contract agreement using a metric-based result type. When you select this type, the **Metric ID** field becomes available on the [Update Agreement Statuses Page](#) and you can select the type of metric to which you want to measure performance against negotiated terms of a contract at the header level.

---

**Note:** You cannot set up line-level agreements for use with metrics.

---

The example below describes how on-time quality performance measurement is calculated. All other metrics use the same concept.

### Example: On-Time Quantity Performance Measurement

This measurement measures the percentage and actual number of shipments that are on time, early, and late for all items within a period, which is captured in PeopleSoft Purchasing when items are received. The system displays the percentage on-time metric, supplier name, and target percentages by period.

---

**Note:** The **Warning Performance** check box is on the Details tab of the [Agreement Notification Page](#) and the **Verification Method** is defined on the [Contract Agreement Definition Page](#).

---

To calculate the performance, the system:

1. Retrieves the actual on-time quantity percentage from procurement history.
2. Calculates the on-time warning-performance percentage by subtracting the tolerance-performance percentage from the negotiated on-time percentage.

For example, if the negotiated on-time percentage is 90 percent and the performance-tolerance percentage is five percent, then the on-time warning performance percentage is 85 percent. Other calculations include:

- If the actual on-time quantity percentage is greater than or equal to the on-time warning performance percentage and less than or equal to the negotiated on-time percentage, then the warning-performance notification condition is met for the contract agreement.
- If the actual on-time quantity percentage is less than the on-time warning performance percentage, then the unacceptable-performance condition is met for the contract agreement.
- If the warning-performance notification condition is met for the contract agreement and the **Warning Performance** check box is selected for the verification step with *System* as the verification method, then the system issues a warning notification.
- If the unacceptable-performance notification condition is met for the contract agreement and the **Unacceptable Performance** check box is selected for the verification step with *System* as the verification method, then the system issues an unacceptable notification.

## Implementing Metric Measurements with Agreements Steps

Supplier Contract Management metric-based agreements use procurement reporting entities to capture procurement history for each contract. When a contract contains a metric-based agreement, a reporting

entry is automatically created that is specific for the contract. To have the system automatically generate the reporting entity, you must:

1. Add an automatic numbering entry for the Contract Reporting Entity ID number type.

This auto numbering setup is required so that the system can automatically create the reporting entity for the contract when you create new contracts that contain metric-related agreements.

To add the entry:

- a. Access the [Auto Numbering Page](#).
- b. Select *Rept. ID* from the list of values.
- c. Select *REPORT\_ENTITY* in the **Field Name** field.

The system also populates the **Max Length** field with 5 as well as other required information. You can add or update start sequences and descriptions for the auto-numbering details.

2. Access the "Supplier Performance Setup Page" (PeopleSoft eSupplier Connection).
3. Select an existing reporting entity in the **Reporting Entity ID** field.

The system references the reporting entity to obtain the default SetID and calendar information for each new reporting entity that it creates automatically when you add new contracts that contain metric-related agreements.

When the system processes the contract ID, it runs the Procurement History Update process (FS\_PRCRUPD). This process includes purchase order receipt information for the contract you specify because the system maintains a link between each contract and the hidden reporting entity for the contract. Use the [Update Procurement Info Page](#) to run the process. Next, you can use the "View Supplier Shipment Performance Page" (PeopleSoft Purchasing) to review the performance for a supplier based on one of the metric measurements.

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**Note:** The Update Procurement Info page in Supplier Contract Management must be used to capture procurement history specific to contracts instead of the version of this component that resides in the PeopleSoft Purchasing Analyze Procurement component.

---

The Review Agreement Statuses page provides the supplier's **Cumulative Performance** value and a link to the View Supplier Shipment Performance page.

This example illustrates the fields and controls on the Update Agreement Statuses page.

### Review Agreement Statuses

SetID:	SHARE	Contract Status:	Open	Version:	1
Contract ID:	000000000000000000000000000045	Fishing Corp. Contract		Begin Date:	04/01/2006
Vendor ID:	SCM0000002	CAMPER'S WAREHOUSE		Expire Date:	06/30/2010

Find | View All | First | 1 of 7 | Last

Note: For Period and Cumulative Performance, these values are system calculated based on receipt information. Actual Result is manually entered.

Sequence:	10	<input checked="" type="checkbox"/> Include In Contract Document	
Agreement Code:	AG-M_ONTIME_QTY	Compliance Status:	Not Set
Agreement Description:	Metric Agreement: On-time Quantity Performance		
Result Type:	Metric	Metric Description:	On-time Quantity Performance
Negotiated Result:	85.000000 % On-Time		
Actual Result:		Cumulative Performance:	<a href="#">65.82% - UNACCEPTABLE</a>
Perf. Tolerance:	5.00	For Period 5 - 2006:	100.00% - ACCEPTABLE
Target Date:	04/01/2006	Last Metric Update:	05/09/2006 5:42:04AM

Notification Comments: On-time Performance by Quantity: track the percentage of on-time deliveries based on the aggregated receipt quantity for the contract

Financial Implication: None

Compliance Comments:

[Contract Step Verification](#)

Use this page to view the level of acceptance or noncompliance to the agreement.

<b>Field or Control</b>	<b>Description</b>
<b>Cumulative Performance</b>	Click the link value to access the "View Supplier Shipment Performance Page" (PeopleSoft Purchasing).

### View Supplier Shipment Performance Page

This page shows percentages, time periods, and actual shipment quantity and quality, such as the number of items received and the number rejected. You can review the results of the most up-to-date cumulative performance percentage of metrics against this contract for the current Update Procurement Info run for this contract. For example, if you are tracking quality performance and have established that an acceptable level of returns is five percent, using the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information), then if 98 percent of the purchase order receipts for this contract have been received without being rejected for quality reasons, after updating procurement history, the View Status Agreements page displays the cumulative performance value of **98% Acceptable**.

In addition, you can access details of the underlying performance down to the individual receipt level for purchase orders linked to the contract. When you click the **Period / Year** link, the Performance Details grid box appears. The Performance Detail grid box provides additional tabs that contain shipping and buyer information. Click the Item ID link to view receipt details for the item.

### Related Links

- "Reviewing Supplier Performance" (PeopleSoft Purchasing)
- "Viewing Procurement Analysis Data" (PeopleSoft Purchasing)

## Common Elements Used When Managing Contract Agreements

<b>Field or Control</b>	<b>Description</b>
<p><b>Activity Status</b></p>	<p>The current status for the step. When you add the agreement to the contract, the status is automatically set to <i>Not Started</i>. The step owner or contract administrator can use this status to track the progress of the step.</p> <p>Values are:</p> <ul style="list-style-type: none"> <li>• <i>Cancelled</i>: Indicates that this step is no longer a requirement to meet the terms of the agreement.</li> </ul> <p>The step's activity status is automatically set to <i>Cancelled</i> if the agreement is canceled.</p> <ul style="list-style-type: none"> <li>• <i>Completed</i>: Indicates that the task has been completed.</li> </ul> <p>Be sure to enter the verification results prior to setting the status to complete. If you do not enter attachments or comments, a date/time, or a yes/no indicator, the system displays a warning that the verification results have not yet been completed. Once set to complete, the associated fields are disabled and not accessible. You must set the status back to <i>Not Started</i> to update the appropriate fields.</p> <ul style="list-style-type: none"> <li>• <i>Failed</i>: Indicates that the task has not been completed to the satisfaction of the contract administrator or in accordance with the agreed upon terms.</li> <li>• <i>In Process</i>: Indicates that the verification process has started or the task is in the process of being completed.</li> <li>• <i>Not Started</i>: Indicates that the step owner has not started the verification process.</li> </ul> <p>The <b>Last User to Update</b> and <b>Last Update Timestamp</b> fields are updated each time the status is changed. The system also records the status change, and if the step is set up to notify interested parties with status changes, then the change triggers workflow notifications. This notification occurs the next time the system runs the Workflow Notifications process.</p>
<p><b>Clause Assignments</b> agreement clause assignments</p>	<p>Click to access the <a href="#">Assign Agreement Clauses Page</a>, where you can select a clause for this agreement.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Compliance Status</b>	<p>The system displays the current status for the agreement. The initial value for this field is <i>Not Set</i>. Values include:</p> <ul style="list-style-type: none"> <li> <p><i>Cancelled</i>: the agreement has been canceled. The system assumes that the agreement and all of its verification steps are no longer valid and does not issue reminders when the target date or due date of the steps is approaching.</p> <p>When the agreement is set to <i>Cancelled</i>, all of the associated steps are also set to <i>Cancelled</i>. If you decide to reactivate the agreement, you must manually reset the steps to <i>Not Started</i> or <i>In Process</i>.</p> </li> <li> <p><i>Compliant</i>: the verification steps are completed and the agreement is in compliance with the set terms.</p> <p>When you select this option, the system verifies that all agreement steps have been completed as specified. If the associated steps are still in the status of <i>In Process</i> or <i>Not Set</i>, or if an attachment is required but not yet linked, the system issues a warning that specifies which steps need to be completed.</p> <hr/> <p><b>Note:</b> Be sure to first enter the actual results and any compliance comments before setting the status to <i>Compliant</i>.</p> <hr/> </li> <li> <p><i>Not Compliant</i>: the verification steps have been completed, but the agreement is not in compliance with the agreed upon terms.</p> </li> <li> <p><i>Not Set</i>: the compliance has not yet been determined. The system automatically assign this status to the agreement when the agreement is added to the contract.</p> <p>If the agreement is currently set to <i>Cancelled</i>, <i>Compliant</i>, or <i>Not Compliant</i> and changes are made to the agreement on the contract, the status is automatically reset to <i>Not Set</i>.</p> </li> </ul> <p>With each change of status, the system updates the <b>Last User to Update</b> and <b>Last Update Date/Time</b> fields. The system also records the status change, which triggers workflow notifications if the agreement is set up to notify interested parties with status changes. The notification occurs the next time the system runs the Workflow Notifications process.</p>
<b>Due Date</b>	<p>The date on which the step should be completed. You set this date when the agreement is added to the contract and you can base it on the target date of the agreement. You can change the due date on the Contract Maintenance pages.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Financial Implication</b>	Enter a statement that relates to the financial implication if an agreement is compliant or not compliant. The statement can describe whether a bonus is paid or a penalty assessed if the agreement is met or not met. The system displays the financial implication on the contract if the agreement is selected. The actual bonus payment or collection for the penalty is a manual process.
<b>Include In Contract Document</b>	Select to include this agreement and its associated clauses on the purchasing contract when you author the contract document and dispatch it to the supplier. You can set up the agreement so that it serves only as an internal reminder to collect certain documentation or to perform steps before the completion of the contract. In these cases, the information should not be sent to the supplier or used in the wording of the contract document.
<b>Last User to Update and Last Updated On</b>	Displays the last user to update the status of the agreement and the date.

<b>Field or Control</b>	<b>Description</b>
<b>Method or Verification Method</b>	<p>The verification method used to indicate the task has been completed. Methods include:</p> <ul style="list-style-type: none"> <li> <p><i>Attaching Supporting Document:</i> Indicates that verification can be made by using an attachment.</p> <p>The verification owner can attach supporting material using the Update Agreement Statuses pages. If attachments are required and are not attached, the system displays a warning message when the activity status is changed to <i>Completed</i></p> </li> <li> <p><i>Comments:</i> Indicates that verification can be made by entering text or comments about the verification step.</p> <p>When this method is selected, a text box is available for entry. If comments are not entered, the system displays a warning message when the activity status is changed to <i>Completed</i>.</p> </li> <li> <p><i>Date/Time Stamp:</i> Indicates that verification can be made by entering a date and time stamp.</p> <p>When you select this method, the <b>Date Verified</b> and <b>Time Verified</b> fields are available for entry. If you do not enter a date and time, the system displays a warning message when the activity status is changed to <i>Completed</i>.</p> </li> <li> <p><i>Notify Only:</i> Use this option when no action is required to signify the step is completed.</p> <p>If a notification is assigned to the step, the system notifies selected roles when the due date of the step is approaching. You can use this method to send periodic informational notifications or reminders to interested parties.</p> </li> <li> <p><i>System:</i> Indicates that the Procurement History Update process provides verification information, such as percentages, for this step.</p> <p>This verification method is only valid for metric result types. If you use a metric result type, you must set up and use a system verification method. At least one system verification step that uses <i>System</i> as the verification method must exist for a contract agreement with a metric result type.</p> </li> <li> <p><i>Online Verification with Y/N:</i> (online verification with yes or no) Indicates that verification can be made by entering a <i>Yes</i> or <i>No</i> response.</p> <p>Use the <b>Yes/No Verification</b> field to enter a response. If a yes or no response is not entered, the system displays a warning message when the activity status is changed to <i>Completed</i>.</p> </li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Metric ID and Metric Description</b>	<p>The metric ID that the system is using to track performance against the agreement. The field is available when the value in the <b>Result Type</b> field is <i>Metric</i>.</p> <p>Values for the field include:</p> <ul style="list-style-type: none"> <li>• <i>On-time Quantity Performance</i></li> <li>• <i>On-time Receipt Performance</i></li> <li>• <i>PO/Receipt Qty Performance</i> (purchase order/receipt quantity performance)</li> <li>• <i>Quality Performance</i></li> <li>• <i>Quantity Performance</i></li> </ul> <p>For a definition of each value, see <a href="#">Metric Measurement Types</a>.</p>
<b>Negotiated Result</b>	<p>When you select a result type other than <i>None</i>, this field becomes available. The negotiated result is the expected outcome of the agreement and represents the value of that outcome. The value for this field depends on the option you selected in the <b>Result Type</b> field. If you selected:</p> <ul style="list-style-type: none"> <li>• <i>Date</i> enter a date.</li> <li>• <i>Monetary</i> or <i>Numeric</i>, enter the amount .</li> <li>• <i>Text</i> an expanded field appears for you to type instructions or descriptions of up to 256 characters.</li> <li>• <i>Metric</i>: this value represents the target percentage for the agreement. For example, for an on-time performance by receipt metric, you might be expecting a 95 percent on-time measurement for this contract.</li> </ul>
<b>Notification Assignments</b>	<p>Click to access the <a href="#">Agreement Notification Page</a>, where you can assign the criteria by which the system sends notifications. Notifications can be sent for an agreement, verification steps, or both. When supply-side updates of agreement activities (deliverables) are enabled, you can define the notification for an external user ID. The supplier can then be notified using an e-mail that contains a URL and provides the supplier access to the specific deliverable through the supplier portal.</p>
<b>Notification Comments</b>	<p>Enter up to 254 characters as a description of the agreement that the system uses when it sends notifications. When notifications are external they appear in the agreement notifications sent to the supplier.</p> <p>Text that appears in the workflow notification worklist, if workflow is set up for the agreement.</p>



<b>Field or Control</b>	<b>Description</b>
<b>Perf Tolerance</b> (performance tolerance)	<p>The tolerance allowed for a measurement. You establish this value when you assign the agreement to the contract on the <a href="#">Contract Header Agreement Assignments Page</a>.</p> <p>For example, if you selected <i>Metric</i> in the <b>Result Type</b> field, and your negotiated results is 95 percent, then a five percent performance tolerance for on-time deliveries implies that 95 percent or better is acceptable, between 90 and 95 percent is considered a warning condition, and below 90 percent is unacceptable.</p> <p>The system can use the resulting actual values during procurement history calculations against these targets to determine whether warning or unacceptable performance notifications should be sent to interested parties. See <a href="#">Metric Measurements</a>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Result Type</b>	<p>Indicates how you are measuring the results of the agreement. If you selected a predefined agreement code, the system displays the default value from that code. When any result type except <i>None</i> is selected, the system provides a <b>Negotiated Result</b> field.</p> <p>Values include:</p> <ul style="list-style-type: none"> <li>• <i>Date</i>: Indicates that you want to use a calendar date as the type of result for measuring the output of the agreement. <p>You typically use this result type when an agreement is dependent on a calendar date. For example, if a function must be completed within 30 days of the start of the contract, you can track the actual completion of the function by entering a date for the results.</p> </li> <li>• <i>Metric</i>: Indicates that you want to measure the performance against a contract agreement using a metric-based type. <p>When you select this type, the <b>Metric ID</b> field becomes available and you can select the type of metric you want to use to measure performance against negotiated terms for contract agreements at the header and line level. The system can use notifications to verify the negotiated metrics on the agreement against procurement history.</p> </li> <li>• <i>Monetary</i>: Indicates that you want to use a monetary amount that relate to the agreement as the result measurement. <p>For example, the supplier must provide you with the cost of an extended warranty.</p> </li> <li>• <i>None</i>: Indicates that there are no compliance requirements. <p>Use this option if you want to track steps or milestones without designating compliance, or if you want to include certain clauses in the document.</p> </li> <li>• <i>Numeric</i>: Indicates that you want to use figures, such as the number of hours a day a crew has access to the work site, to measure the agreement.</li> <li>• <i>Text</i>: Indicates that you require text, such as a description of work completed. <p>This text might include observations by an on-site inspector or comments by the contract administrator.</p> </li> <li>• <i>Yes/No</i>: Indicates that you want to use a yes or no indicator as the measurement of whether the agreement is compliant.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Step or Verification Step</b>	<p>This is the step that defines the order in which verification is completed. The system begins the sequence number with 10, but you can change the sequence value to maintain the order when you insert new rows. You should leave gaps between the step numbers in case you want to insert additional verification steps at a later date.</p> <p>Verification steps define the criteria necessary to fulfill the agreement. After you define information for any field for the step, the system assumes you are adding verification steps to the agreement. You can delete steps on an existing contract without affecting the basic agreement.</p> <p>The system uses the step value to help order and locate specific verification requirements.</p>
<b>Step Owner or Verification Step Owner</b>	<p>The name of the person assigned this task and responsible for verifying that the step was completed. The owner can be either an internal or external person. The owner does not have to be associated to a user ID.</p> <p>Verification could include the step owner collecting documents or notifying the contract administrator whether a step is compliant.</p> <hr/> <p><b>Note:</b> To update the status or information for external users, the user must be listed on the Notification Assignments page and have update access to the verification step. This ensures that external users are notified and provides access for multiple external users to individual verification steps.</p> <hr/> <p>For additional information about maintaining external users, see "Maintaining Supplier Contact Information" (PeopleSoft eSupplier Connection), <a href="#">External Users and Document Collaboration</a>, and <a href="#">Understanding Contract Deliverable Verification Steps</a>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Target Date</b>	<p>The date by which the terms of the agreement must be completed to be compliant. You enter the date when you assign the agreement to the contract. Or, you can let the system automatically determine the date based on when an existing agreement code is selected. The date is based on the contract start or end date, or a specified number of days prior to or past the contract start or end date.</p> <p>Methods include:</p> <ul style="list-style-type: none"> <li>• <i>Contract End Date</i>: Select to use the end date that is defined for the contract as the default target date. If you select this value, the system provides zero as the default value in the <b>Number of Days</b> field and disables the field.</li> <li>• <i>Contract End Date + N days</i>: Select to use the contract end date plus the number of days that you enter in the <b>Number of Days</b> field.</li> </ul> <p>For example, if you enter <i>10</i> in the field, the verification of the agreement is due ten days after the contract end date.</p> <ul style="list-style-type: none"> <li>• <i>Contract End Date – N days</i>: Select to use the contract end date, minus the number of days that you enter in the <b>Number of Days</b> field. This action makes the verification agreement due before the contract end date.</li> <li>• <i>Contract Start Date</i>: Select to use the start date that you defined for the contract as the default target date. If you select this value, the system provides zero as the default value in the <b>Number of Days</b> field.</li> <li>• <i>Contract Start Date + N days</i>: Select to use the contract start date plus a specified number of days after that date to establish the due date for agreement verification.</li> <li>• <i>Contract Start Date – N days</i>: Select to use a specified number of days before the contract start date as the due date for agreement verification.</li> </ul>
<b>Upload a File</b> and Upload Another File	<p>Upload one or more documents by clicking the <b>Upload a File</b> link. After a file has been attached to the verification step, the <b>Attachments</b> section appears at the bottom of the page. You can add additional attachments by clicking the <b>Upload another File</b> link.</p>
<b>Version</b>	<p>Displays the version of the contract. Versions enable you to create and maintain multiple versions of the contract in the system. Versions provide a snapshot of the contract at a point in time and make it easier for you to view information in older contract versions.</p>

# Predefining Agreements

## Pages Used to Predefine Agreements

Page Name	Definition Name	Usage
<a href="#">Contract Agreement Definition Page</a>	CS_AGREE_HDR	Set up basic agreement information for contract agreements.
<a href="#">Assign Agreement Clauses Page</a>	CS_AGREE_CLAUSE	Assign clauses to contract agreements.
<a href="#">Agreement Notification Page</a>	CS_AGREE_WF	Assign notifications for agreements and steps.

## Contract Agreement Definition Page

Use the Contract Agreement Definition page (CS\_AGREE\_HDR) to set up basic agreement information for contract agreements.

Navigation:

**Supplier Contracts > Monitor and Update Agreements > Setup Agreements > Contract Agreement**

This example illustrates the fields and controls on the Contract Agreement Definition page.

Use this page to predefine agreements. After defining the agreement, you can use the agreement code to provide default information from this agreement into a new contract agreement. Agreement codes

are defined by SetID. SetID records are the same set control group as the PeopleSoft Supplier Contract Management contract set control group.

Refer to [Common Elements Used When Managing Contract Agreements](#) for common field definitions. Those that are not common are defined below.

<b>Field or Control</b>	<b>Description</b>
<b>Agreement Code</b>	Displays the identifier for the agreement that you are adding or maintaining.
<b>Effective Date</b>	Select the date on which the agreement is to become effective. The default value is today's date. This date controls when you can use the agreement.
<b>Status</b>	Select the state of the agreement. If you select <i>Active</i> , the agreement is available for immediate use with contracts. If you select <i>Inactive</i> , you can create the agreement and define its data, but it is not available for use.
<b>Result Type</b>	Select a value that indicates how you are measuring the results of the agreement. The result type you select determines other page elements and system behavior when you assign this predefined agreement to a contract. <hr/> <b>Note:</b> Some result types are metric-related. See <a href="#">Understanding Agreement Metrics</a> . <hr/>
<b>Default Target Date</b>	Select a method for defining the default target date. The system uses the value defined here to calculate a due date for the agreement when the agreement is specified on a contract. After you add the date, changes to the agreement's default target date does not change the contract's target date on any contract where this agreement code is specified.
<b>Number of Days</b>	Enter the number of days by which you want to offset the default target date. For example, if you select <i>Contract Start Date + N days</i> in the <b>Default Contract Date</b> field and you want the default contract date to be seven days after the contract start date, enter 7 in the <b>Number of Days</b> field.

### Verification Steps - Details

Use this section to define the verification steps for this agreement.

<b>Field or Control</b>	<b>Description</b>
<b>Step</b>	<p>When you add data to any of the following fields, the system assumes you are adding verification steps to the agreement and certain fields on the page then become required. If you do not add data to the step, the system assumes there are no verification steps.</p> <p>Verification steps are automatically added to a contract when you specify the agreement on the contract. You can delete steps without affecting existing contracts. You can also delete steps on an existing contract without affecting the predefined agreement.</p>
<b>Verification Step Owner</b>	<p>Select a user who will be responsible for this agreement verification step. You can also enter an owner's name.</p> <p>When you select a predefined agreement to use with a contract, the system populates the verification owner information along with due date information for the contract agreement.</p>
<b>Verification Method</b>	<p>Select the method by which you want to verify this step. The method defines how a verification owner indicates that a verification step has been completed. This field is required if you are adding steps to the agreement.</p> <p>For a definition of each option, see <a href="#">Common Elements Used When Managing Contract Agreements</a>.</p>

### Verification Steps - Comments

Use this tab to enter comments about the verification step to include the e-mail notification that is sent to the approver, collaborator, or reviewer. You can enter up to 254 characters and you can define separate comments for each verification step.

### Assign Agreement Clauses Page

Use the Assign Agreement Clauses page (CS\_AGREE\_CLAUSE) to assign clauses to contract agreements.

Navigation:

Click the **Clause Assignments** link on the Contract Agreement Definition page.

The system adds these clauses to the transactional contract when you specify this agreement for the contract header, contract line, or contract category.

If you elect to include the agreement information in the contract document, the system incorporates the clauses specified here into the Microsoft Word document. When defining sections for a document, you

include agreement information. When that section is used in a document configurator, the system adds clauses associated with the agreements to the document.

Use the **Search** button to select a clause to include on the contract agreement. See [Search Content By Type Page \(for Clauses, Document Configurators, and Sections\)](#).

The **Title**, **Full Text**, and **Reference Text** fields are display-only. When you select a clause ID, the system populates these fields with existing clause data. You cannot change this data unless you use the clause maintenance facility. In this case, the clause update is controlled by the document authoring system and could include collaboration and approvals before the approval status makes it available to be used again.

<i>Field or Control</i>	<i>Description</i>
<b>Sequence</b>	<p>Displays the sequence for this agreement clause. The sequence number controls the order in which the clause appears in the document. The system generates this Microsoft Word document using information and values from the document authoring system and transactional data.</p> <p>When a clause is first added to an agreement, the sequence number is 10 by default, but you can change it as needed. When adding additional clauses, you should leave a gap between sequence numbers in case you need to insert an additional clause between two existing clauses. Click the + button and assign the sequence number based on where the clause should appear.</p>
<b>Clause ID</b>	<p>Select a clause to assign to the agreement. This is a required field. The clause must already exist before you can assign it to an agreement. You cannot add ad hoc clauses to agreements. Use the Clause feature in the Manage Contract Library component to add a clause for use with an agreement.</p>
<b>Search</b>	<p>Select to access the Clause Search page, where you can provide search information for locating clauses.</p>

### Select Body Text

Use this group box to define which type of body text you want to use in the clause. You can select only one type.

<i>Field or Control</i>	<i>Description</i>
<b>Full Text</b>	<p>Select to display the full text of the clause in the agreement document. Full text and by reference text are generation types that the system uses when generating the working Microsoft Word document. You can select either full text or by reference text.</p>



<b>Field or Control</b>	<b>Description</b>
<b>By Reference Text</b>	Select to include text by reference in the clause. Text by reference indicates a line to which the clause applies and a reference document that describes conditions for the line. The citation of the reference text should be sufficient to describe the contents of the reference, so that reprinting the full text of the clause in the document is not needed.
<b>Title</b>	Displays the clause title. This value is used with the clause regardless of whether you select <b>Full Text</b> or <b>By Reference Text</b> .
<b>Full Text</b>	Displays the full text from the clause.
<b>Reference Text</b>	Displays the by reference text from the clause.

**Related Links**

[Setting Up Clauses](#)

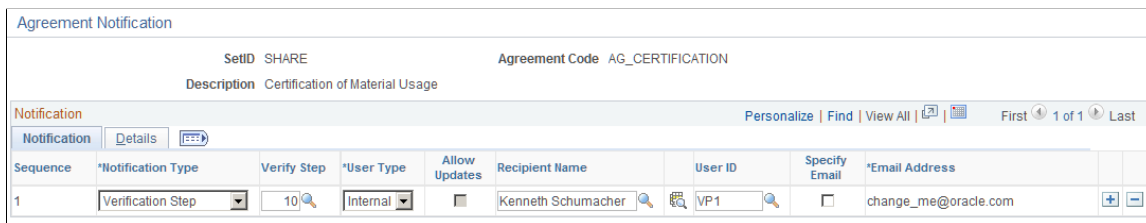
**Agreement Notification Page**

Use the Agreement Notification page (CS\_AGREE\_WF) to assign notifications for agreements and steps.

Navigation:

Click the **Notification Assignments** link on the Contract Agreement Definition page.


This example illustrates the fields and controls on the Agreement Notification page.



Use this page to indicate if notifications will be initiated when a change in status occurs for an agreement or step or if you want to notify the recipient about a pending or past due date.

The system uses these notifications as default values on the contract when the agreement is specified on the contract header or line. The recipients you add here are typically those individuals who are always an interested party when this agreement is included in a contract. At the contract level, you can add additional notifications or delete existing ones. If the interested parties are always different for each contract, you do not need to specify any notifications here. Instead, you can set up the notifications when you create the transaction contract.

<b>Field or Control</b>	<b>Description</b>
<b>Sequence</b>	Displays the notification sequence. This is a system-generated number that identifies the notification.
<b>Notification Type</b>	<p>Select a notification type. Notification types are triggers for sending notifications to specified recipients, and is a required field. You can add as many recipients as necessary for each notification type. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Agreement</i>: Select if you want to send the notification to the recipient when the status of the agreement changes, or to remind the recipient of an approaching or past target date</li> <li>• <i>Agreement and Step</i>: Select if you want to send the notification to the recipient when the status of the agreement or a step changes, or when you want to remind the recipient of an approaching or past target date for either the agreement or step.</li> <li>• <i>Verification Step</i>: Select if you want to send the notification to the recipient when the status of a step changes, or to remind the recipient of an approaching or past target date. When you select this option, you must also specify the step number in the Verification Step column.</li> </ul>
<b>Verify Step</b>	Select a verification step to which this notification applies. The system displays this field when you select <i>Verification Step</i> as the value in the <b>Notification Type</b> field.
<b>User Type</b>	<p>Select whether the user is an internal or external user. The system controls the behavior of the remaining fields, depending on your selection. If you select <i>Internal</i>, the system low lights the <b>Allow Updates</b> check box.</p> <p>If you select <i>External</i>, you can indicate if the external user can update the agreement and manually enter users and their email addresses.</p>
<b>Allow Updates</b>	<p>Select to allow external users to update the agreement verification step (deliverable) when you have enabled supply-side portal access to update the deliverable. This check box is only available for external users. Suppliers can then update this deliverable at any time, but they are notified to do so based on the notification setup for their user IDs.</p> <p>For more information about external users: See <a href="#">Reviewing and Collaborating on External Documents</a> and "Understanding Supplier Information Maintenance" (PeopleSoft eSupplier Connection)</p>

<b>Field or Control</b>	<b>Description</b>
<b>Recipient Name</b>	Enter an external user who is not defined to the system. You must also enter an email address when you enter a recipient. You can also select an internal user, but the system does provide the email address automatically. To populate the <b>User ID</b> and <b>Email Address</b> fields automatically, use the <b>Search Recipient</b> button, described next, to select a recipient.
	Click this button to search for users based on either their recipient name, user ID, or email address. The system populates the <b>Recipient Name</b> , <b>User ID</b> , and <b>Email Address</b> fields with your selection.
<b>User ID</b>	Select a user ID to use for this notification.
<b>Specify Email</b>	Select to activate the <b>Email Address</b> field. You can normally use the address that the system placed in the field which will be the default email address for the user ID, or you can override and manually enter an external email address for cases where simple notification is wanted but a user ID does not exist in the system.
<b>Email Address</b>	Enter an email address for the recipient. This field is required and the system uses it to route notifications. The system automatically populates this field from the user ID's default email. If you are sending a notification to an external user, you can manually enter the address. Make sure the <b>Specify Email</b> check box is selected to allow updates to this field.

## Details

Use this tab to set up notification reminder dates for recipients of agreement or step notifications. You can base notifications on a change in status of the agreement or step or as a reminder when a due date is approaching. You can also select to send notifications in all instances or to send notifications for specific reminders.

<b>Field or Control</b>	<b>Description</b>
<b>Notify On Status Change</b>	<p>Select if you want to notify the recipient when a status change occurs in the agreement or verification step. The system sends the notification to all recipients with a notification type set to <i>Agreement</i> or <i>Agreement and Steps</i> when the compliance status of the agreement is changed from <i>Not Set</i> to <i>Cancelled</i>, <i>Compliant</i>, or <i>Not Compliant</i>.</p> <p>If the activity status of the verification step changes from <i>Not Started</i> to <i>Cancelled</i>, <i>Completed</i>, <i>Failed</i>, or <i>In Process</i> and the recipient's notification type is set to <i>Agreement and Steps</i> or <i>Steps</i> (and the step specified is being changed), the system sends a notification. To make changes to the status at the agreement or verification step level, use the Update Agreement Statuses component.</p>
<b>Warning Performance</b>	<p>Select if you want to warn the recipient about the performance against an agreement. This check box is available when the notification is tied to a verification step that has a system verification method and a metric result type.</p>
<b>Unacceptable Performance</b>	<p>Select if you want to notify the recipient that the performance against an agreement is unacceptable. This check box is available when the notification is tied to a verification step that has a system verification method and a metric result type.</p>
<b>Reminder Number Of Days Prior</b>	<p>Enter the number of days that you want a recipient to take action before the agreement or verification step is due. For example, if the target date of the agreement or the due date of the step is set to March 15 and you set the number of days prior to 5, the system notifies the recipient five days before March 15 (that is, March 10). If the notification type is <i>Agreement</i>, the system notifies the recipient this number of days before the target date of the agreement.</p> <p>If the notification type is <i>Verification Step</i>, the system notifies the recipient this number of days before the due date of the step. If the notification type is <i>Agreement and Step</i>, the system notifies the recipient this number of days before the target date of the agreement as well as this number of days before the due date of every step. If you leave this field blank, the system does not send reminders.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Final Reminder Days</b>	Enter the number of days before the target date of the agreement or the due date of the step that you want the system to send a final reminder. This field processes dates the same as the <b>Reminder Number of Days Prior</b> field and represents the last notification before the target date or due date have passed.
<b>Passed Target Date</b>	Select to indicate that the recipient is to be notified when the target date of the agreement has passed and the compliance status of the agreement is not set to <i>Compliant</i> or the due date of the step has passed and the activity status is not set to <i>Completed</i> . The system notifies the recipient following each run of the Workflow Notifications process until the agreement or step status is set to <i>Compliant/Completed</i> or <i>Canceled</i> .

## Assigning Agreements to Purchasing Contracts

### Pages Used to Assign Agreements to Purchasing Contracts

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Contract Header Agreement Assignments Page</u>	CS_AGREE_CNT	Assign contract header agreements.  "Using the Fluid Group and Special Purpose Contracts" (PeopleSoft Source to Settle Common Information)
<u>Contract Header Clause Assignments Page</u>	CS_AGREE_CNT_CLAUS	Assign contract header clauses.
<u>Contract Header Notification Assignments Page</u>	CS_AGREE_CNT_WF	Assign contract header notifications.
<u>Contract Line Agreement Assignments Page</u>	CS_AGREE_CLN	Assign contract line agreements.
<u>Contract Line Clause Assignments Page</u>	CS_AGREE_CLN_CLAUS	Assign contract line clauses.
<u>Contract Item Line Notification Assignments Page</u>	CS_AGREE_CLN_WF	Assign contract line notifications.
<u>Contract Category Agreement Assignments Page</u>	CS_AGREE_CAT	Assign contract category agreements.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Contract Category Clause Assignments Page</u>	CS_AGREE_CAT_CLAUS	Assign contract line clauses.
<u>Contract Category Notification Assignments Page</u>	CS_AGREE_CAT_WF	Assign contract category notifications.

## Understanding Purchasing Contract Agreements

You can assign predefined agreements to a contract at the header level, the line level, and at the category level. Header-level agreements are typically negotiated terms that apply to the entire contract. Line-level agreements are terms that apply only to a specific line item on the contract. When you select an agreement from the agreement library, the system provides the information defined on the agreement by default into the contract. You can modify the information associated with the contract without changing the data on the master agreement. As an alternative, you can also create ad hoc agreements at each level by defining them directly on the contract. Ad hoc agreements are not part of the agreement library, but exist only for the life of the contract for which they were created.

Using category-level agreements, you can assign agreements that apply to a group of items that belong to the category. This saves you from assigning agreements for individual items in the category.

When you install PeopleSoft Strategic Sourcing and Supplier Contracts Management, you can optionally assign clauses and agreements to Strategic Sourcing bid factors. The clauses can appear to bidders online during the bid response process, and on the event Adobe PDF file that the system generates when a sourcing event is posted. The bid factors and responses can also become an agreement and results when the event is converted to a contract.

## Contract Header Agreement Assignments Page

Use the Contract Header Agreement Assignments page (CS\_AGREE\_CNT) to assign contract header agreements.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Contract Entry.** Click the **Contract Agreement** link on the Contract Entry page.

This example illustrates the fields and controls on the Contract Header Agreement Assignments page.

**Contract Entry**

**Contract Header Agreement Assignments**

SetID: SHARE Contract Status: Open Version: 1  
 Contract ID: AA Fishing Corp. Contract Begin Date: 04/23/2009  
 Vendor: CAMPER'S-001 Expire Date: 06/06/2014

**Agreements** Find | View All First 1 of 7 Last

\*Sequence: 10  Include In Contract Document  
 \*Agreement Code: AG-M\_ONTIME\_QTY Compliance Status: Not Set  
 \*Agreement Description: Metric Agreement: On-time Quantity Performance  
 \*Result Type: Metric \*Metric Description: On-time Quantity Performance  
 Negotiated Result: 85.000000 % On-Time  
 Perf. Tolerance: 5.00  
 Target Date: 04/08/2011  
 Notification Comments: On-time Performance by Quantity: track the percentage of on-time deliveries based on the aggregated receipt quantity for the contract  
 Financial Implication: None

[Clause Assignments](#) [Notification Assignments](#)

**Verification Steps** Customize | Find | View All First 1 of 1 Last

Details Comments

Description	*Step	*Step Owner	*Verification Method	*Due/Start Notify Date	Activity Status
On-time Quantity Performance Verification	10	Kenneth Schumacher	System	10/02/2009	No Start

Use this page to assign agreements to a contract. You can select from an existing list of agreements, manually add agreement information, or modify information that was converted from a Strategic Sourcing event. The page initially displays with the basic information about the contract, including the contract ID, status, supplier, and version number.

If you use a predefined agreement code, the information from the agreement appears as default information on this page. You can change the information, but changes to predefined information affect only the specific contract. The changes are not made to the original agreement. The information that you define for the agreement exists only for the life of the contract.

**Note:** Only active agreements that are effective as of the begin date of the contract can be selected.

If agreement terms and verification steps are unique to a particular contract, you can define those terms and steps for the contract without first defining them as an agreement code. In this case, the information is available only for the life of the contract. While agreement information is also copied to another contract, when you use the copy function to create a new contract, the agreement information will not be a part of the agreement library. As with predefined agreement codes, you can add clauses and notifications.

You can also predefine agreement information on a contract if the contract was generated from a PeopleSoft Strategic Sourcing event. You can associate agreement codes with Strategic Sourcing bid factors that are subsequently used with Strategic Sourcing events. When you award a buy auction to a bidder and create a contract, the system converts the bidder's responses from bid factor questions to the agreement information on the contract.

The page contains agreement details and comments as well as the verifications steps and owners who are required to determine if the agreement is compliant. A contract can have multiple agreements with each one having a different set of verification steps. You can also assign clauses and notification information to each individual agreement.

When you complete this page, you can create the document for the agreement and its clauses. If a document already exists for the agreement, you need to refresh or re-create the document to incorporate any changes you make to the agreement information.

Group and Special Purpose contracts can also be added and maintained using the fluid page.

"Using the Fluid Group and Special Purpose Contracts" (PeopleSoft Source to Settle Common Information)

## Agreements

Refer to [Common Elements Used When Managing Contract Agreements](#) for common field definitions. Those that are not common are defined below.

<b>Field or Control</b>	<b>Description</b>
<p><b>Sequence</b></p>	<p>Displays the agreement sequence code. If you are initially adding agreements to a contract, the default sequence number is 10, but you can change it. When adding additional agreements, you should leave a gap between sequence numbers in case you want to insert an additional agreement between two existing ones. To insert an additional agreement, click the + button and assign the sequence number based on where the agreement should appear.</p> <p>The sequence number controls the order in which associated clauses are added to the document. Clauses for the first agreement are added first, clauses for the next agreement are added second, and so on.</p> <p>If the system automatically adds agreements when it converts the PeopleSoft Strategic Sourcing event to a contract, the agreements are added with sequence numbers in increments of 10.</p>
<p><b>Agreement Code</b></p>	<p>Select a predefined code or enter an ad hoc code. If you select a predefined code, the system populates the agreement with the information defined for that code. If you are entering an ad hoc agreement, you must complete all required fields.</p> <p>If the contract was created from a PeopleSoft Strategic Sourcing event, the system converts bid factor responses to the agreement information.</p> <hr/> <p><b>Note:</b> Metric type agreements are not available to Group, Special Purpose, Distributor and Manufacturer contract process options.</p> <hr/> <p>See <a href="#">Understanding Agreement Metrics</a></p>



<b>Field or Control</b>	<b>Description</b>
<b>Agreement Description</b>	Displays the description that is associated with an agreement code. If you are creating an ad hoc agreement, enter a description.
<b>UOM (unit of measure)</b>	Select a unit of measure that defines the numeric value entered in the <b>Negotiated Result</b> field. The <b>UOM</b> field is available and required if you selected a result type of <i>Numeric</i> .
<b>Currency</b>	If you selected a result type of <i>Monetary</i> , the <b>Currency</b> field is available for entry and is required. Select the currency that defines the monetary amount entered in the <b>Negotiated Result</b> field.

### Verification Steps - Details

Use this section to define the steps required to validate the agreement. If you selected a predefined agreement code, the system automatically populates the steps that can be changed, added to, or deleted. If you are adding an ad hoc agreement, or if the agreement information originated from a PeopleSoft Strategic Sourcing event, you can add steps. You can also establish verification methods and verification step owners. To update header agreement statuses, use the Monitor and Update Agreements component to access the Update Agreement Statuses page where you can view and manage verification processes.

Refer to [Common Elements Used When Managing Contract Agreements](#) for common field definitions. Those that are not common are defined below.

<b>Field or Control</b>	<b>Description</b>
<b>Description</b>	Enter a description for the verification step. An example would be, what document or inspections are required to complete the step. If a verification step is added to the agreement, this field is required.

<b>Field or Control</b>	<b>Description</b>
<b>Due/Start Notify Date</b>	<p>For nonmetric agreements steps, this value indicates the date that this verification step must be completed. The due date defaults to the target date of the agreement, or is a calculated date based on the contract start or end date.</p> <p>For metric-related steps, this date indicates when you want to start evaluating metric-agreement performance. See <a href="#">Understanding Agreement Metrics</a></p> <p>For system verification methods, the value in the <b>Due/Start Notify Date</b> field represents the date to start notification to users for any error or warning conditions related to the metric. The system uses this value in conjunction with the value that you enter in the <b>As of Date</b> field on the Process Notification run control page. If the <b>Due/Start Notify Date</b> field value is less than or equal to the <b>As of Date</b> field value on the run control, the system checks this metric to determine if notifications need to be sent.</p>

### Verification Steps - Comments

Use this tab to enter a description that the system uses if notifications are associated with the step.

### Related Links

[Contract Agreement Definition Page](#)

## Contract Header Clause Assignments Page

Use the Contract Header Clause Assignments page (CS\_AGREE\_CNT\_CLAUS) to assign contract header clauses.

Navigation:

Click the **Clause Assignment** link on the Contract Header Agreement Assignments page.

Use this page to assign clauses to contract header agreements. These clauses pertain to the terms of the contract in general. You can alternately assign clauses to specific line items by defining agreements at the line level. If you add a predefined agreement and clauses are associated with the agreement, those clauses appear on this page. If the contract was created from a PeopleSoft Strategic Sourcing event and bid factors with associated clauses were added to the contract, the system displays them as well.

You can add or delete clauses without affecting the basic agreement or bid factor definition. However, you cannot change the text of the clause using this page. Instead, use the [Clause Definition Page](#) to update clauses. The order in which the clauses are added to each agreement determines the order in which they appear in the document.

## Related Links

[Assign Agreement Clauses Page](#)

## Contract Header Notification Assignments Page

Use the Contract Header Notification Assignments page (CS\_AGREE\_CNT\_WF) to assign contract header notifications.

Navigation:

Click the **Notification Assignments** link on the Contract Header Agreement Assignments page.

Use this page to define who should review this contract header agreement. You can assign notifications for changes in status of the header-level agreements, as well as reminders for the verification steps associated with the header agreements. If you selected a predefined agreement, the system copies the notifications from that agreement. You can change any attribute about the notification, delete existing notifications, or add additional notifications without affecting the basic agreement.

## Related Links

[Agreement Notification Page](#)

## Contract Line Agreement Assignments Page

Use the Contract Line Agreement Assignments page (CS\_AGREE\_CLN) to assign contract line agreements.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Contract Entry.** Click the **Contract Agreement** button for a line item on the Contract Entry page.

Use this page to assign an agreement to a line item on a contract. This feature makes it possible to define contract terms and clauses specific to an item or item category. You can assign agreements to specific line items by clicking the **Contract Agreement** button in the **Lines** grid of the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information). Use this button to access the Contract Item Line Agreements Assignments page. This page is identical to Contract Header Agreements Assignments page that you use to assign agreements at the contract header level. Field values and the use of the pages are similar.

Use the Verification Steps section to establish verification methods and verification step owners. To update line item agreement statuses, access the Update Agreement Statuses page where you can view and manage verification processes.

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**Note:** Metric agreements are not available at the line- and category-agreement level.

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## Related Links

[Contract Header Agreement Assignments Page](#)

"Agreements page" (PeopleSoft Source to Settle Common Information)

## Contract Line Clause Assignments Page

Use the Contract Line Clause Assignments page (CS\_AGREE\_CLN\_CLAUS) to assign contract line clauses.

Navigation:

Click the **Clause Assignment** link on the Contract Line Agreement Assignments page.

Use this page to add a clause to an agreement for a contract line item. Click the **Description** link to access details about the item. You can add clauses by clicking the **Add a New Row** button.

### Related Links

[Assign Agreement Clauses Page](#)

## Contract Item Line Notification Assignments Page

Use the Contract Item Line Notification Assignments page (CS\_AGREE\_CLN\_WF) to assign contract line notifications.

Navigation:

Click the **Notification Assignments** link on the Contract Line Agreement Assignments page.

Use this page to define notification assignments for an agreement that is linked to a line item. Click the **Description** link to access item details

### Related Links

[Agreement Notification Page](#)

## Contract Category Agreement Assignments Page

Use the Contract Category Agreement Assignments page (CS\_AGREE\_CAT) to assign contract category agreements.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Contract Entry**. Click the **Contract Agreement** button for the category line on the Contract Entry page.

Use this page to assign an agreement to a category on a contract. This feature enables you to define contract terms and clauses that apply to an entire group of items in a contract category.

Use the Verification Steps section to establish verification methods and verification step owners. To update category agreement statuses, access the Update Agreement Statuses page where you can view and manage verification processes.

### Related Links

[Contract Header Agreement Assignments Page](#)

## Contract Category Clause Assignments Page

Use the Contract Category Clause Assignments page (CS\_AGREE\_CAT\_CLAUS) to assign contract line clauses.

Navigation:

Click the **Clause Assignment** link on the Contract Category Agreement Assignments page.

Use this page to add a clause to an agreement for a contract category. The system adds these clauses to the transactional contract document when you specify this agreement for either the contract header or contract line.

### Related Links

[Assign Agreement Clauses Page](#)

## Contract Category Notification Assignments Page

Use the Contract Category Notification Assignments page (CS\_AGREE\_CAT\_WF) to assign contract category notifications.

Navigation:

Click the **Notification Assignments** link on the Contract Category Agreement Assignments page.

Use this page to define notification assignments for an agreement that is linked to a category. You can use notifications when a change in status occurs for an agreement or step, or if you want to notify the recipient about a pending or past due date.

### Related Links

[Agreement Notification Page](#)

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## Reviewing and Updating Contract Agreement Statuses

### Pages Used to Review and Update Contract Agreement Statuses

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Process Notifications Page</a>	CS_RUN_CNTL_WF	Process agreement notifications.
<a href="#">Update Agreement Statuses Page (search)</a>	CS_CNT_AG_SEARCH	Search for contract agreements and verification steps that you want to review and update.
<a href="#">Update Agreement Statuses Page</a>	CS_CNT_AG_RESULTS	Review and update agreement statuses.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Contract Verification Details Page</u>	CS_CNT_VFY_SEC CS_CLN_AG_VFY_UPD	Review and update agreement verification steps. See also <a href="#">Uploading Attachments for Agreement Steps</a> .

## Process Notifications Page

Use the Process Notifications page (CS\_RUN\_CNTL\_WF) to process agreement notifications.

Navigation:

**Supplier Contracts > Monitor and Update Agreements > Setup Agreements > Workflow Notifications**

Use this page to periodically run the Workflow Notification process. The process initiates the reminders and notifications specified on the agreement. The system always processes notification entries if there has been a status change. Based on the conditions, the system only processes notifications if the compliance status is Not Set or the activity status is Not Started or In Process. The system also updates the statuses and notification flags during the process and keeps any Draft versions of the contract agreement synchronized with the contract.

The process determines which notifications must be sent based on the notification type and the options defined on the Details tab of the Agreement Notification page. If the notification type is *Agreement*, the process checks for these conditions:

- If a quantity is specified for the **Reminder Number of Days Prior**, the process checks if the current date is less than or equal to the agreement's target date minus the number of days specified. If the condition exists, the process sends a notification.
- If a quantity is specified for the **Final Reminder Days** field, the process checks if the current date is equal to the agreement's target date minus the number of days specified.

If the condition exists, the process sends a final reminder.

- If the current date is past the agreement's target date, the process sends a past due reminder, depending on whether the **Agreement Past Due** check box is selected.

If the notification type is *Verification Step*, the process checks for these conditions:

- If a quantity is specified for the *Reminder Number of Days Prior* field, the process checks if the current date is equal to the due date of the step minus the number of days specified. If the condition exists, the process sends a notification.
- If a quantity is specified for the final reminder days, the process checks if the current date is equal to the due date of the step minus the number of days specified. If the condition exists, the process sends a final reminder.
- If the current date is past the due date of the step, the process sends a past due reminder, depending on whether the **Verification Past Due** check box is selected.

If the notification type is *Agreement* and *Step*, the process sends notifications based on the agreement criteria defined on this page as well as for each step that meets the verification step criteria.

<b>Field or Control</b>	<b>Description</b>
<b>Agreement Past Due</b>	<p>Select to indicate that the system should issue past due notifications each time this process is run. If the <b>Passed Target Date</b> check box is selected on the Agreement Notification page, the current date is past the target date of the agreement, and the agreement status is not <i>Compliant</i>, then the process issues a past due notification.</p> <p>Therefore, if the agreement is past due by 10 days and this process is run daily, the recipient has received 10 past due notifications and continues to receive reminders each time this process is run. This occurs until the task is set to <i>Compliant</i> or this check box is deselected.</p> <p>If the <b>Passed Target Date</b> check box is not selected for the agreement notification, the system does not send past due reminders, regardless of this setting.</p>
<b>Verification Past Due</b>	<p>Select to indicate that the system should issue past due notifications for verification steps each time it runs this process. If the <b>Passed Target Date</b> check box is selected for the verification step, the current date is past the due date of the verification step, and the step is <i>Completed</i>, then the system issues a past due notification.</p> <p>Therefore, if the step is past due by five days, and the system runs this process daily, the recipient has received five past due notifications and continues to receive reminders each time this process is run. This occurs until the task is set to <i>Completed</i> or this check box is deselected.</p> <p>If the <b>Passed Target Date</b> check box is not selected on the workflow of the verification step, the system does not send past due reminders, regardless of the setting for this check box.</p>
<b>Warning &amp; Unacceptable Performance</b>	<p>Select to use the run control defined for the notification and generate notifications for the contracts that contain system-generated metric performance agreements. These metric-related agreement notifications warn recipients about a supplier's performance against an agreement. Warning and unacceptable percentage ranges for performance are defined for individual contracts. Notifications are tied to verification steps that have a system verification method and a metric result type.</p>

<b>Field or Control</b>	<b>Description</b>
<b>As of Date</b>	<p>Enter an end date for sending notifications. If you select to send warning and unacceptable performance notifications, then this field is required. It determines which metric-agreement verification steps in the contract should be considered for notification.</p> <p>If the contract's verification step <b>Due/Start Notify Date</b> field value is less than or equal to the value that you enter in the <b>As of Date</b> field, and the metrics negotiated result is unacceptable or outside of tolerance, then a notification is sent to the specified users. Setting the <b>As of Date</b> field on the run control provides you more control over when the notifications are sent for metric-related agreements by setting this date that is prior to today's date.</p> <hr/> <p><b>Note:</b> This date is independent of the metric data and date ranges that the system uses to calculate the metric data, which is determined by the reporting entity and run control when you updating contract procurement history.</p>
<b>Last Period Only</b>	<p>Select to indicate that you want to use information from the last period on which to notify recipients of warning or unacceptable supplier performance against contracts. Normally, the system uses the cumulative metric information to determine if notifications are to be sent. This option is useful when you want to monitor the compliance by the last period of metric data that is based on the last run of the Procurement History Update process within PeopleSoft Supplier Contract Management versus monitoring the compliance by cumulative metric data.</p> <hr/> <p><b>Note:</b> The last period of data that the system evaluates is dependent on the data stored after running the Procurement History Update process and not the value defined in the <b>As of Date</b> field.</p>

## Update Agreement Statuses Page (search)

Use the Update Agreement Statuses page (CS\_CNT\_AG\_SEARCH) to search for contract agreements.

Navigation:

**Supplier Contracts > Monitor and Update Agreements > Update Agreement Statuses**

**Supplier Contracts > Monitor and Update Agreements > Review Agreement Statuses**

Use the search page to define criteria for viewing and updating contract agreements and verification steps. At a minimum, you must select either a contract ID or verification step owner to perform the search. If you do not specify any other criteria, all agreements that are associated to the contract appear when you click the **Search** button. You can limit the list by entering information in the available fields.

If the contract specified has no agreements, or if you apply other search criteria within the contract that is not met, the **Agreements Retrieved** grid appears empty.



## Search Criteria

Refer to [Common Elements Used When Managing Contract Agreements](#) for common field definitions. Those that are not common are defined below.

<b>Field or Control</b>	<b>Description</b>
<b>Contract ID</b>	<p>Select a contract ID. All other criteria that you enter for the search relate to agreements that are attached to this contract. The contract must be in an <i>Approved</i>, <i>Open</i>, or <i>On-Hold</i> status. Contracts that are in a <i>Closed</i> or <i>Cancelled</i> status are not available for search</p>
<b>Item Line</b>	<p>Select a contract item line number on which to search for agreements.</p> <p>If you specify a line number, the system retrieves only those agreements for that line number, but also considers the value that you select in the <b>Results to Include</b> field. For example, if a contract has two lines with agreements (B and C), and two category lines with agreements (A and B) and you specify <i>Header</i>, <i>Item Line</i>, <i>Category Line</i> in the <b>Results To Include</b> field, and enter <i>B</i> in <b>Item Line</b> field, then the system returns all the header rows, item line B, and all category lines.</p> <p>If item line agreement numbers are not associated with the contract, the search results are blank when you select to look up the item line. The search is similar for contract category line searches described next.</p>
<b>Cat. Line</b> (category line)	<p>Select a contract category line number. The system retrieves specific category agreements for the category lines. If category line agreement numbers are not associated with the contract, then the search results are blank when you select to look up the contract category line.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Results to Include</b>	<p>Select to limit search results to header agreements, line agreements, or contract category line agreements. The system uses the selected options as the default value. Options include:</p> <ul style="list-style-type: none"> <li>• <i>Header Agreements Only</i>  Header agreements are those agreements that have been attached to the general terms of a contract and typically apply to the entire contract.</li> <li>• <i>Item Line Agreements Only</i>  An item line agreement applies to a specific line in the contract.</li> <li>• <i>Category Line Agreements Only</i>  Category line agreements are those agreements that have been attached to a contract category. This makes it possible to define contract terms and clauses specific to a group of items that belong to a contract category. See "Understanding Contract Categories" (PeopleSoft Source to Settle Common Information).</li> <li>• <i>Header, Item Line, Category Line</i></li> </ul>

After you define the criteria, click the **Search** button and the system retrieves agreements that match the criteria.

### Agreements Retrieved

Use this section to review search results and select the agreement that you want to view or update. The system displays header, line, and category agreements for the specified contract. Click any of the links to navigate to details about the agreement.

<b>Field or Control</b>	<b>Description</b>
<b>Contract ID</b>	<p>Displays the contract ID that you selected for the search along with either a header designation, line designation, or category designation, and a corresponding number. This indicates the agreement is associated with the contract header line, or category displayed in the field. You can have multiple agreements at the header, line, and category levels.</p> <p>Click a link to access the Update Agreement Statuses page where you can view all agreements associated with the agreement. Click the contract agreement link labeled as a <i>HEADER</i> to view all header-level agreements for the contract. Click the agreement link that is labeled as <i>LINE</i> to view the line-level agreement. And, click the agreement link that is labeled as <i>CAT LN</i> to view the contract category agreement for the line.</p>
<b>Agreement Sequence and Code and Agreement Description</b>	<p>Displays the agreement sequence and the agreement code that are used for agreements. Click the link to access the Update Agreement Statuses page where you can update the status, results, verification information, and enter comments or attachments for the specific agreement. A description of the agreement also appears.</p>

## Related Links

[Understanding PeopleSoft Search Framework and Where-Used Searches](#)

## Update Agreement Statuses Page

Use the Update Agreement Statuses page (CS\_CNT\_AG\_RESULTS) to review and update agreement statuses.

Navigation:

**Supplier Contracts > Monitor and Update Agreements > Update Agreement Statuses.** Click the **Search** button on the Update Agreement Statuses page after completing search criteria and click an agreement sequence and code.

**Supplier Contracts > Monitor and Update Agreements > Review Agreement Statuses.** Click the **Search** button on the Review Agreement Statuses page after completing search criteria and click an agreement sequence and code.

You can also access this page using the Monitor Contract Compliance component.

Use this page to review and update information about agreements for a single contract. Contract administrators use this page to access verification details. The agreement (header, item line, or category line) as well as the result type determine which fields appear on this page. The system displays contract information in the upper portion of the page. For line-level agreements, the system displays additional

information about the line number, item ID, item description, and item category. For category line agreements, the system displays the category line and contract category. If version control is being used, the contract version also appears.

Information in the Contracts Agreements section is the same for all agreements. However, the value in the **Result Type** field determines which additional fields appear.

Click the **Maintain Document** button to access the [Document Management Page](#) where you can access contract documents. The button is available if a contract document has been created for the contract. See [Predefining Agreements](#).

Most information on this page is display-only, except the **Compliance Status**, **Actual Result**, **Notification Comments**, and **Compliance Comments** fields.

Refer to [Common Elements Used When Managing Contract Agreements](#) for common field definitions. Those that are not common are defined below.

<b>Field or Control</b>	<b>Description</b>
<b>Result Type</b>	<p>Displays how the results of the agreement are measured. The value of this field determines which fields appear with measurement information. For example, if you are using a Metric result type, the system displays the metric ID, negotiated result, actual result, performance tolerance for specific periods and cumulative compliance performance. Also, a link is available to PeopleSoft Purchasing pages that gather and chart metrics information for the agreement. See <a href="#">Understanding Agreement Metrics</a>.</p>
<b>Negotiated Result</b>	<p>Displays the value that the contract administrator uses to determine whether the agreement is compliant.</p>
<b>Actual Result</b>	<p>Enter the actual results of the agreement prior to setting the status to <i>Compliant</i> or <i>Not Compliant</i>. The contract administrator uses this information to determine whether the terms of the agreement have been met.</p> <p>Entries in the field depend on the result type:</p> <ul style="list-style-type: none"> <li>• If the result type is Date, the <b>Actual Result</b> field expects a date format and the system displays a calendar. As an example, you can enter a date that represents when a milestone was reached.</li> <li>• If the result type is Yes/No, then <i>Yes</i> and <i>No</i> values are available for selection.</li> <li>• If the type is Monetary or Numeric, enter a numeric value.</li> <li>• If the type is Text, the system displays an extended text field that is available for entry.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Cumulative Performance</b>	<p>Displays the most recent overall performance percentage for the contract. This field is available for display if you are using a metric measurement.</p> <p>This value is based on system calculations when you run the Procurement History Update (FS_PRCRUPD) process, and is a cumulation of all periods included for the contract. For example, if you have specified tracking quality performance and established that an acceptable level of quality-related returns is five percent, and 98 percent of the purchase order receipts for this contract have been received without being rejected for quality reasons, then the system displays <i>98%-Acceptable</i> as the cumulative performance for the supplier.</p> <p>This value is also a link to access the View Supplier Shipment Performance page where you can view charted data and additional information about performance. You can also navigate to the individual receipt level for purchase orders linked to the contract.</p> <p>See <a href="#">Implementing Metric Measurements with Agreements Steps</a>.</p>
<b>For Period</b>	Displays the actual performance and status for the most recent period.
<b>Last Metric Update</b>	Displays the last date and time that the Update Procurement Info process was run for the contract for all purchase orders related to the contract. This indicates how current the contract metric values are. The Update Procurement Info process must be run from within Supplier Contract Management to update metric values for the contract.
<b>Compliance Comments</b>	Enter text that you want to retain regarding the agreement. This might include why the agreement was canceled or is considered not compliant. After the status is set to <i>Cancelled</i> or <i>Compliant</i> , you can no longer enter comments.
<b>Contract Step Verification</b>	Click to access the step details where you can update the status, attach documents, or enter comments. The system displays this link when there are verification steps associated with the agreement. See <a href="#">Contract Verification Details Page</a> .

## Related Links

[Monitor Contract Agreements Page](#)

[Contract Agreement Status Details Page](#)

## Contract Verification Details Page

Use the Contract Verification Details page (CS\_CNT\_VFY\_SEC) to verify details about verification steps for a contract agreement

Navigation:

Click the **Contract Step Verification** link on the Update Agreement Statuses page or the Review Agreement Statuses page.

You can also access this page using the Monitor Contract Compliance component.

This example illustrates the fields and controls on the Contract Verification Details page.

**Contract Verification Details**

SetID: SHARE Contract Status: Approved Version: 1  
 Contract ID: AA Fishing Corp. Contract Begin Date: 04/23/2009  
 Vendor ID: SCM0000002 CAMPER'S WAREHOUSE Expire Date: 06/06/2014  
 Cat Line: 1  
 Category: CAMPING Camping Equipment  
 Agreement Sequence: 10  
 Agreement Code: AG\_CERTIFICATION Certification of Material Usage

**Verification Steps** Find | View All First 1 of 2 Last

Verification Step: 10  
 Description: Certification for Graphite Usage  
 Due Date: 05/23/2009 Step Owner: Kenneth Schumacher  
 \*Activity Status: In Process Method: Attachment  
 Notification Comments:

[Upload another File](#)

**Attachments** Customize | Find | View All First 1 of 1 Last

File Name	Attachment Description	View	Delete
SHARE_AA202_0.00.xml	Verification Requirements	View	-

OK Cancel

Use this page to update the status of the verifications steps on a contract agreement. Verification steps are a checklist of tasks to be completed before the system considers the agreement as compliant. You assign each step to an owner and the owner can update the step information directly or pass the information to the contract administrator who can perform the updates on behalf of the owner. As part of the update process, you can also upload attachments.

As with other pages in this component, information that appears on the page depends on whether you are viewing a line, header, or category line agreement. If attachments exist with the agreement, the **Attachments** grid appears when you open the Contract Verification Details page. If attachments do not exist, use the **Upload a File** link to add them and access the grid. Contract information appears at the top of the page and if the steps are associated with a line or category line agreement, the system displays additional line information.

**Note:** Supplier-side (external) users cannot change the agreement status. Agreement information is display-only for external users, but they can update verification steps. If you have enabled supply-side access to the system, there is a separate page provided for supplier users to access and update only those verification steps (deliverables) to which they have update authority.

The system validates when a verification step is tied to an external owner, and issues a warning when you change the agreement status to Compliant or Not Compliant and the verification status for the step is set to Not Started or In Process. If you change the verification step status and the verification step if owned by an external owner, the system also issues a warning.

See [Reviewing and Collaborating on External Documents](#).

Refer to [Common Elements Used When Managing Contract Agreements](#) for common field definitions. Those that are not common are defined below.

## Related Links

[Contract Agreement Status Details Page](#)

## Uploading Attachments for Agreement Steps

Use the Contract Verification Details page (CS\_CNT\_VFY\_SEC) to verify agreement verification steps.

Navigation:

Click the **Contract Step Verification** link on the Update Agreement Statuses page or the Review Agreement Statuses.

Use the **Attachments** section to add documents associated with the verification step. The grid appears after you upload at least one attachment. If an attachment already exists, the grid appears when you open the Contract Verification Details page for a line or header agreement.

You can use attachments as a means of capturing additional information about the agreement or task. Also, an attachment might be required as a verification method. For example, you may require a copy of the supplier's license or certifications, which can be attached using this page. You can attach documents even when the verification method is not *Attachment*.

You can upload and view a variety of documents, including Microsoft Word and Adobe Reader documents, as well as Microsoft Excel, PowerPoint, and Access files. Attachments are read only files. You can edit these files and load them again to make changes. They are not managed through the document authoring system

## Updating Contract Procurement History

### Page Used to Update Contract Procurement History

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Update Procurement Info Page</a>	CS_RNCNTL_PRCR_UPD	Run procurement updates.

## Understanding Procurement Updates

Analyzing procurement data provides you with information about procurement trends and can assist you when managing supplier relationships. Supplier Contract Management enables you to use summaries from PeopleSoft Purchasing - receipt transactions to create metric definitions for assessment against contract agreements.

Within Purchasing, you can update procurement history information by setting up a reporting entity. When you define a reporting entity, you define data selection criteria, such as specific purchasing or payable business units, or all business units, and calendar ID, for the item procurement history.

In Supplier Contract Management, you use the Update Procurement Info page to collect the purchase order receipt history that is specifically related to the contracts and system metric-related contract agreements you have defined. When you define a system-related agreement for the contract, the system automatically adds a reporting entity for you to collect the purchase order receipt information of the contract. To access the reporting entity, select **Purchasing > Analyze Procurement > Setup Profiles > Define Procurement Controls**.

The Procurement History Update process for Supplier Contract Management is run by contract ID. The system uses the correct reporting entity related to that contract ID to retrieve the specific calendar and other information needed to collect the data.

### Related Links

["Define Procurement Controls Page" \(PeopleSoft Purchasing\)](#)

[Understanding Agreement Metrics](#)

## Update Procurement Info Page

Use the Update Procurement Info page (CS\_RNCNTL\_PRCR\_UPD) to run procurement updates.

Navigation:

**Supplier Contracts > Monitor and Update Agreements > Update Procurement Info**

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**Note:** This topic discusses running the procurement history update specifically for metric-related contract agreements.

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Use this page to set up control information for the Procurement History Update process and to run the process. The system collects procurement history from transaction tables for the reporting entities related to each contract processed. This procurement history is used to calculate the cumulative performance for agreements on the contract that are system-metric orientated. After running this process, you can view the cumulative performance values for the related contracts using the Monitor Agreement Compliance component.

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**Note:** For this process, the system only gathers purchase orders for calculation that specify the contract ID within the purchase order. Furthermore, the system collects data based on receipts against those purchase orders in the time periods specified by the calendar ID related to the reporting entity for each contract ID.

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Refer to [Common Elements Used When Managing Contract Agreements](#) for common field definitions. Those that are not common are defined below.



<b>Field or Control</b>	<b>Description</b>
Contract Beginning Date	<p>If you leave <b>Contract ID</b> field blank, you can enter a contract beginning date indicating that you want to run and update procurement history for all contracts that have a contract begin date within the Contract Entry component that is greater than or equal to the date that you enter. This enables you to limit the gathering of metric information to just those contracts that are the most recent and pertinent for evaluation.</p> <hr/> <p><b>Note:</b> If you select a contract ID, and then enter a date in the <b>Contract Beginning Date</b> field, the system clears the <b>Contract Beginning Date</b> field when you save or run the Procurement History Update process. The system also displays a warning when you save or run the process.</p> <hr/>
<b>Relative</b>	<p>Select this option to run the update process on a range of periods that are relative to the current period. The <b>Start - Current Period Minus</b> and <b>End - Current Period Minus</b> fields are available for entry when you select this option.</p> <p>This option is useful when you choose to schedule history updates. After you enter relative period information and save it on this page, the process runs using these parameters each time the PeopleSoft Process Scheduler submits the process.</p>
<b>Start - Current Period Minus</b>	Enter the number of periods before the start of the current periods to which you want to begin procurement history accumulation.
<b>End - Current Period Minus</b>	Enter the number of periods before the start of the current period to which you want to end procurement history accumulation.
<b>Specify</b>	Select this option to define a specific period range for which you want to generate procurement history data. The <b>Start Period, Start Year, End Period, and End Year</b> fields become available when you select this option.

## Related Links

[Understanding Agreement Metrics](#)

# Monitoring Agreement Compliance

## Pages Used to Monitor Agreement Compliance

Page Name	Definition Name	Usage
<a href="#">Monitor Contract Agreements Page</a>	CS_CNT_AG_MONITOR	Define selection criteria for contracts to view.
<a href="#">Contract Agreement Status Details Page</a>	CS_CNT_AG_DETAIL	Review details for agreement statuses.
<a href="#">Review Agreement Statuses Page</a>	CS_CNT_AG_RESULTS	Navigate to agreement information. See also, <a href="#">Update Agreement Statuses Page</a>

## Monitor Contract Agreements Page

Use the Monitor Contract Agreements page (CS\_CNT\_AG\_MONITOR) to define selection criteria for contracts to view. The system displays the results of the search using the Status Summary grid.

Navigation:

**Supplier Contracts > Monitor and Update Agreements > Monitor Agreement Compliance**

This example illustrates the fields and controls on the Monitor Contract Agreements page: Summary tab. .

The screenshot shows the 'Monitor Contract Agreements' page with the following search filters:

- Contract Administrator: [Text Field]
- Supplier SetID: [Text Field] (SHARE)
- Contract SetID: [Text Field] (SHARE)
- Agreement SetID: [Text Field] (SHARE)
- Compliance Status: [Dropdown Menu]
- Assigned To: [Text Field]
- Supplier ID: [Text Field]
- Contract ID: [Text Field]
- Agreement Code: [Text Field]

Below the filters is a 'Filter By Date' section and a 'Search' button. The main content area shows the 'Status Summary' tab selected, displaying a grid with the following data:

SetID	Contract ID	Compliant	Not Compliant	Not Set	Past Due	Complete	Failed	In Process	Not Started	Details
SHARE	000000000000000000000000000050			1	1				2	<a href="#">Details</a>
SHARE	000000000000000000000000000045			8	6				14	<a href="#">Details</a>
SHARE	000000000000000000000000000024			4	4	2		7		<a href="#">Details</a>
SHARE	000000000000000000000000000023			4	4	3		7		<a href="#">Details</a>

Use this page to view search results for agreement and verification step statuses. The system uses SetID default values for the search.

The system summarizes search results by contract ID. The **Status Summary** grid displays the total number of agreements and verification steps in a specific status. Statuses display as column headings. You can have multiple agreements and steps for a single contract. By selecting the link under one of the status headings, you can navigate to and view which agreements or steps are in that status.

Use the Filter by Date group box to search for agreement based on dates. For example, you can use the **Past Due as of Date** field to search for agreements that might be coming due or are past due in the next few days or week. By entering a future date, the system checks all agreements and verification steps with a current status of Not Set or Not Started and a target date or due date prior to or equal to the date you select. This enables you to monitor tasks that might have fallen behind schedule. When you enter a past due as of date, the system automatically sets the **Compliance Status** field to *Not Set*. If you do not select a date, the system still indicates which agreements or steps have not been completed as of today's date for the contracts it includes in the search results.

You can also limit search results based on from and to target dates and from and to due/start notify dates.

After defining the selection criteria for the search, click the **Search** button. The system displays the Status Summary grid with the search results.

When you click a link for a status on this page, you access the Contract Agreement Status Details page.

### Status Summary

<b>Field or Control</b>	<b>Description</b>
<b>Contract ID</b>	Displays the contracts that meet the selection criteria. Each row of data displays agreement and verification step information about a single contract. Click the contract ID link to access the Contract page where you can view and update header, item line, and category line agreement information.
<b>Compliant</b>	Displays the number of agreements for this contract that are in the Compliant status. Click the link to access the Contract Agreement Status Details page where you can view agreement details.
<b>Not Compliant</b>	Displays the number of agreements for this contract that are in the Not Compliant status. Click the link to access those agreements.
<b>Not Set</b>	Displays the number of agreements for this contract that are in the Not Set status. They are not considered compliant, but they are not yet considered not compliant.

<b>Field or Control</b>	<b>Description</b>
<b>Past Due</b>	<p>Displays a number that depends on what you entered in the <b>Past Due as of Date</b> field in the search selection criteria, this number can represent different values.</p> <ul style="list-style-type: none"> <li>If you entered a date, the number represents the number of agreements that could, potentially, be an issue based on the agreement's current status of <i>Not Set</i>.</li> </ul> <p>However, you would need to be make a decision by the date specified as to whether the agreement is compliant.</p> <ul style="list-style-type: none"> <li>If you did not enter a date, this number represents the number of agreements that are not compliant as of today's date and could, potentially, be considered not compliant.</li> </ul> <p>You should review these agreements to check whether verification steps, if specified, have been completed on time or whether the terms of the agreement have or have not been met.</p>
<b>Complete, Failed, In Process, and Not Started</b>	<p>Displays the number of verification steps within a contract that are in the specified status. These steps can be associated with any of the agreements within the contract. Click the link to access the Contract Agreement Status Details page where you can view the agreements with their associated verification steps and the status of each individual step for each agreement.</p>
<b>Details</b>	<p>Click the link to display specific information about an agreement or verification step. This displays all agreements with their associated verification steps for the contract to which they are associated. Additionally, the system displays the target date, step owner, and current status.</p>

## Supplier

Use this tab to review supplier information for contracts. The information includes the supplier ID and name. You can also access the contract to make changes to supplier information.

## Contract Agreement Status Details Page

Use the Contract Agreement Status Details page (CS\_CNT\_AG\_DETAIL) to review details for agreement statuses.

Navigation:

Click a link in the **Status Summary** grid.

This example illustrates the fields and controls on the Contract Agreement Status Details: Details tab.

Contract Agreement Status Details						
SetID SHARE		Contract Status Approved			Version 1	
Contract ID 000000000000000000000000000045		Fishing Corp. Contract			Begin Date 04/01/2006	
Supplier ID SCM0000002 CAMPER'S WAREHOUSE					Expire Date 06/30/2015	
<a href="#">Status Details</a> <span style="float: right;">Personalize   Find   View All       First 1-10 of 22 Last</span>						
<a href="#">Details</a>   <a href="#">Results</a>   <a href="#">Filter</a>						
Agreement Level	Agreement Sequence and Code	Verification Step	Description	Target Date	Assigned To	Status
HEADER	10 - AG-M_ONTIME_QTY		Metric Agreement: On-time Quantity Performance	04/01/2006		Not Set
		10	On-time Quantity Performance Verification	04/01/2006	Kenneth Schumacher	Not Started
HEADER	20 - AG-M_PO/RCPCT_QTY		Metric Agreement: PO/Receipt Qty Performance	04/01/2006		Not Set
		10	PO/Receipt Qty Performance Verification	04/01/2006	Kenneth Schumacher	Not Started
HEADER	30 - AG-M_QUALITY		Metric Agreement: Quality Performance	04/01/2006		Not Set
		10	Quality Performance Verification	04/01/2006	Kenneth Schumacher	Not Started
		20	Supplier ISO Certification Verification	04/01/2006	Kenneth Schumacher	Not Started
HEADER	40 - AG-M_QUANTITY		Metric Agreement: Quantity Performance			Not Set
		10	Quantity Performance Verification	04/01/2006	Kenneth Schumacher	Not Started
		20	Carriers Performance Verification	04/01/2006	Kenneth Schumacher	Not Started
<a href="#">Return to Monitor Contract Agreement Search</a>						

Use this page to review the details about contract agreements and verification steps, line released amounts, and results of the verifications. The amount and order of information that appears on the page depend on the selection criteria you entered to access the page.

<b>Field or Control</b>	<b>Description</b>
<b>Maintain Document</b>	Click to access the Document Management page. This button is available when a document has been created for the contract.
<b>Agreement Level</b>	Displays whether the agreement is at a header level, a line level or category-line level. Line-level and category-line level agreements also display the line number for the contract item. Click the link to view either the header- or the line-agreement information and navigate to verification step information. The system accesses the Review Agreement Statuses page, similar to how it accesses the page when you click the <b>Agreement Sequence and Code</b> link. The only difference is that for the agreement level, you can scroll through all the agreements for that level; whereas, for the agreement sequence and code, you only see that one agreement.
<b>Agreement Sequence and Code</b>	Displays the order in which the agreement is sequenced, followed by the predefined agreement code that is used as a basis for creating the agreement. If you click the link for this value, you can navigate to the Review or <u>Update Agreement Statuses Page</u> where you can review all the information about the agreement including its verification steps. .
<b>Verification Steps</b>	Displays the verification steps that are associated with a line or header agreement. The system lists the steps for each agreement code that is used in the agreement.

<b>Field or Control</b>	<b>Description</b>
<b>Description</b>	Displays a description of the corresponding agreement or verification step.
<b>Target Date</b>	Displays the estimated completion date for the agreement or the due date for the verification step.
<b>Assigned To</b>	Displays the person who is responsible for verifying the corresponding agreement verification step.
<b>Status</b>	<p>Displays the current state of the agreement or verifications step.</p> <ul style="list-style-type: none"> <li>• Values for agreements are <i>Compliant, Not Compliant, and Not Set</i>.</li> <li>• Values for steps are <i>In Process, Failed, Completed, and Not Started</i>.</li> </ul>

## Results

Use this tab to review the actual results of completing a verification step or meeting the terms of the agreement.

<b>Field or Control</b>	<b>Description</b>
<b>Line Released Amount</b>	Displays the amount of the contract that has been released and sourced to a purchase order. The system expresses this amount in the contract header currency.
<b>Actual Result</b>	Displays the actual result for the agreement when it is entered on the Update Agreement Statuses page. Actual results are the values that verification owners enter to further describe the processing of the agreement. The system records the actual result of the agreement activity and keeps it in this field for historical purposes. The system uses the agreement compliance status to process agreement conditions.
<b>Cumulative Actual Performance</b>	<p>Displays the accumulated performance percentage and status for this agreement based on the history of periods included in the Procurement History Update process run page for this contract.</p> <p>See <a href="#">Reviewing and Updating Contract Agreement Statuses</a>.</p>

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>For Period</b>	Displays the actual performance and status for the most current period.





# Collaborating and Signing Documents

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## External Users and Document Collaboration

External users are the external supplier collaborators, signers, and deliverable owners who are outside of the customer's system that uses PeopleSoft Supplier Contract Management. These users must be defined and setup by internal or external supplier administrators so that they can manage, view, and edit contract documents.

External collaboration is the process of sending contract documents to an external user for review and updates and who then uploads the document where administrators or contract specialists can manually incorporate the reviews into a new version of the document. External users can review and comment about documents, or they can edit documents and amendments if permission has been granted in the PeopleSoft Supplier Contract Management system.

Internal contract managers or administrators can route documents for external collaboration (editing and uploading) to only the single external user who is defined as the primary contact. These external users can then route the document offline to gather inputs from the supplier side. During external collaboration, the system stages the amendment files for review on the external side and keeps the files separate from the files that are currently under version control. The administrator reconciles the returned files to decide whether to accept the files into version control or to manually copy or paste changes. Attachments are also staged so that new attachments added by the external user will have to be accepted before they become part of the core attachments.

External collaboration requires that external users have a sign on to your system using the supplier-side URL. Enabling external access to the internal PeopleSoft Supplier Contract Management system requires the setup of external web servers that are outside of an organization's firewall. For more information about external web servers, see the following PeopleTools documentation:

See *PeopleTools: System and Server Administration* and *PeopleTools: Portal Technology*

External users must have a user ID created for them, or create their own user ID using the self-registration feature provided using PeopleSoft eSupplier Connection. Access to specific external documents and deliverables is secured at the row level so that external users can only view and update information if that user is enabled to do so for that particular document or deliverable. In addition the document status and certain configuration settings determine when a contract and what history external user can view through the external portal.

See "Maintaining Supplier Contact Information" (PeopleSoft eSupplier Connection), [Understanding PeopleSoft Supplier Contract Management Setup](#), and [Understanding Document Life Cycles](#).

You can list external users using the Document Management page for each document you want to share with an external user. While you can define multiple external users for a document, each document has a primary external owner. This is the only external user who can upload modified or signed documents and comments as part of the collaboration or signing process. Other nonprimary external users can view the document but cannot make modifications. So, if multiple users at an external organization need to provide

feedback and changes to a document, the primary external owner can circulate the document offline for those changes or signatures and upload the document back to the system upon completion.

For documents created against procurement contracts or purchase orders, you can define an external user as a contract collaborator using supplier contact setup. This retrieves the supply-side user ID as a default value into the document external contact including the supply side user id needed for row level document security.

### **Related Links**

[Collaborating on Documents](#)

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## **Understanding Contract Deliverable Verification Steps**

A contract deliverable is a negotiated set of conditions in a contract. The deliverable is based on a contract agreement verification step defined in the PeopleSoft Supplier Contract Management system within the Contract Entry component that specifically spells out the conditions and terms that apply to a contract. For each agreement, the contract manager can define the verification requirements, whether the agreement is compliant with the terms of the contract, as well as when and who to notify, internally and externally, when a compliance date is approaching or has passed. To enable external notification and access for external users you must define the external user on the Workflow Notification page for the agreement in the Contract Entry component.

Verification steps can be assigned to an agreement code. Verification steps define the criteria necessary to fulfill the agreement. The verification method defines how a verification owner indicates that a step has been completed. The verification methods are notify only, comments, date/time, system, yes/no, and attachment.

When a contract manager indicates that a contract agreement verification step can be owned by an external user, the system provides notification to that user and a URL to access the deliverable maintenance and review pages for the supplier. External users are those users outside of the PeopleSoft Supplier Contract Management system. External users who have been assigned ownership of a deliverable verification step can access those steps assigned to them and update the step information and view statuses in the same manner used by internal users. The agreement status itself is controlled internally, and is not accessible to external users.

The system sends email notifications as you have defined for each contract agreement and its steps to external users when verifications are due. The emails contain links to PeopleSoft Supplier Contract Management deliverable pages. As an external user, and you are not logged into the system, you can click the link to access the verification page contained in the email. When you click the link, the system links directly to the contract deliverable page that requires verification. If you are already logged into the system, you can click the link in you worklist to access the deliverable verification step.

External users can also view the agreement status information when they own a verification step. Viewing status information enables you to see the detailed metrics performance related to the agreement.

### **Related Links**

[Sending Documents to Internal and External Contacts](#)

## Reviewing and Collaborating on External Documents

### Pages Used to Maintain External Contract Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Document Search Page</a>	CS_DOC_SRCH_EXT	Search for external contract documents. External pages are designed for external system access and are available only on the supplier portal registry where <i>SUPPLIER</i> is in the URL instead of <i>EMPLOYEE</i> .
<a href="#">Document Management Page</a>	CS_DOC_SUPP	Maintain and collaborate on external contract documents.
<a href="#">Attachments and Related Authored Documents Page</a>	CS_DOC_SUPP_ATT	View attachments and related authored documents for external documents.
Document Details Page	CS_DOC_SUPP_DET_SP	View a listing of interested parties that have been defined by the contract administrator by clicking the Contract Document link on the Document Search page and then clicking the Document Details link on the Document Management page. See also, <a href="#">Document Details Page</a> in the “Maintaining Document Details” topic.
<a href="#">Document History Page</a>	CS_DOC_SUPP_HST_SP	View external document history.
<a href="#">External Collaboration History Details Page</a>	CS_DOC_SUPATT_SP2	View external collaboration history details.
<a href="#">Send Email Page</a>	CS_DOC_EMAIL_EXT	Send email to contract administrators and other external users.

### Understanding External Collaboration

External collaboration on documents is always initiated by the PeopleSoft system contract administrator. The administrator first reviews and updates the list of external collaborators using the External Contacts/Signers link in the Document Management component, and then clicks the **Route Externally** button to notify the external user that a collaboration is pending. The most common method for this notification is through email that provides a link into the supplier portal web site.

For authored documents rendered by Microsoft Word, the system makes the .xml document available for collaboration. When using Microsoft Word, external users must be using a comparable version of Microsoft Word to support the content controls that the system includes in the document. This maintains the document's capability for checking in the document.

When using Microsoft Word , the system verifies that the same document checked out is coming back in for .xml formats using an internal persistent code. The code is the document ID that represents the document. You can also collaborate with external users on imported documents such as a legacy .doc version of the file. In this case, the external user can upload as well. However; a persistent document ID is not maintained internal to the document for imported legacy files.

In addition to supporting authored .xml documents you can also import legacy documents or supplier paper such as a word .doc file and collaborate on them as well. For scenarios where you want to initiate contract negotiations with a document, but do not want to initiate a transactional contract or purchase order prior to document approval, you can first create the document as an ad hoc type, and collaborate on the document as an ad hoc document and if needed do a one-time change of the source transaction from the ad hoc to another source, such as a purchase order or purchasing contract. This enables a contract under negotiation that has been initiated from a supplier document to result in a purchase order or purchasing contract after the supplier document has been supplied. This feature is enabled with or without external collaboration.

## Document Search Page

Use the Document Search page (CS\_DOC\_SRCH\_EXT) to search for external contract documents.

Navigation:

**Manage Contracts > Maintain Contract Documents**

This example illustrates the fields and controls on the Document Search page for suppliers.

**Maintain Contract Documents**

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**Document Search**

Document Administrator:

From Begin Date:  To Begin Date:

From End Date:  To End Date:

All Documents  Pending Review  Pending Approval/Signatures

**Advanced Search Criteria**

Source Transaction:

Contract ID:

PO Number:

Ad Hoc ID:

---

**List of Documents** Customize | Find | View All | First 1-4 of 4 Last

Documents

Contract Document	Description	Document Status	Status Date/Time
<a href="#">000000000000000000000000000040</a>	Standard contract	Customer Review	
<a href="#">000000000000000000000000000026</a>	Procurement Charges	Pending Review	08/25/2009 4:00PM
<a href="#">000000000000000000000000000025</a>	Volume Purchase Contract	Pending Review	08/25/2009 3:34PM
<a href="#">000000000000000000000000000023</a>	Fishing Rods	Dispatched	08/25/2009 2:16PM

You can search for specific documents using search criteria. After you define the criteria and click the **Search** button, the system populates the List of Documents section with documents that meet the criteria.

<b>Field or Control</b>	<b>Description</b>
<b>Document Administrator</b>	Select an administrator on which to base a document search. The document administrator is the internal user who is typically the contract specialist in an organization and the user who performs day-to-day management of documents.
<b>From Begin Date, To Begin Date, From End Date, and To End Date</b>	Select dates on which you want to begin and the date range for a document search. Any documents that were created starting within the from and to beginning dates and within the from and to ending dates range will be included in the search results.
<b>All Documents</b>	Select to view all documents for which you have view authority. You must select at least one of the three check boxes to search for documents. When you select the <b>All Documents</b> check box, the system inactivates the <b>Pending Review</b> and <b>Pending Approval Signatures</b> check boxes.  <b>Note:</b> The system searches for all documents and includes ad hoc, purchase order, and purchasing contract documents in the search results. If you want to search for specific documents, use the Advanced Search Criteria section.
<b>Pending Review</b>	Select to access only the documents that are pending your review. These are documents that have been routed for external collaboration by the contract administrator.
<b>Pending Approval/Signatures</b>	Select to access only the documents that are pending your approval and signature. These documents have been routed for external digital signatures by the contract administrator. By signing the document, you are approving it.

## Advanced Search Criteria

Use this section to define additional criteria for searching. Use the **Source Transaction** field to select individual types on which to base a search. The default value is clear, meaning that all types will appear in the search results when the system performs the search. Settings on the Installation Options page determine if purchase order and purchasing contract source transaction are enabled.

These values are available for the field:

- *Ad Hoc*: Select to search for ad hoc contract documents that meet the remaining criteria that you define. When you select this option, the **Ad Hoc ID** field becomes available for you to further limit the search to a specific ID.
- *Purchase Orders*: Select to search for purchase order contract documents that meet the remaining criteria that you define. When you select this option, the **PO Number** (purchase order number) field becomes available for you to further limit the search to a specific purchase order number.

- *Purchasing Contracts*: Select to search for purchasing contract documents that meet the remaining criteria that you define. When you select this option, the **Contract ID** field becomes available for you to further limit the search to a specific ID.

You can also limit a document search based on a specific ad hoc ID, purchase order number, or contract ID. You can use the Lookup button to select the specific document.

## List of Documents

This grid box appears with the search results when you click the **Search** button.

<b>Field or Control</b>	<b>Description</b>
Contract Document	Displays the document name. Click the name to access the Document Management page where you can perform review, collaboration, approval, and signature tasks. The description also appears with the document.
Document Status	Displays the current status of the document in the Supplier Contract Management system. The status is synchronized with the internal system to reflect the current state. The statuses are the life cycle stages of a document. So if a document is not waiting on an action from the external user, the status can change in the internal system. The system displays <i>Other</i> in this field when a document has been reviewed and sent back to the PeopleSoft internal system.
Status Date and Time	Displays when the system updated the status. When a date does not appear, the document is located in the internal document authoring system.

## More Details

This tab displays additional contract document information.

<b>Field or Control</b>	<b>Description</b>
Begin Date and Expire Date	Displays the contract dates. These values come from the purchase order or purchasing contract dates. The values for ad hoc contract documents is the date the document was created.
Amendment	Displays the amendment number.

<b>Field or Control</b>	<b>Description</b>
Supplier Reference Number	Displays a reference that suppliers can use to reference this contract document. The system retrieves this value from the ad hoc, purchasing contract, or purchase order ID used to create the document.

## Document Management Page

Use the Document Management page (CS\_DOC\_SUPP) to maintain and collaborate on external contract documents.

Navigation:

**Manage Contracts > Maintain Contract Documents.** Click the **Document** link on the Document Search page.

When a document has been routed for external collaboration by the internal contract user, this page is accessible to the external user.

This example illustrates the fields and controls on the Document Management page for suppliers.

**Maintain Contract Documents**

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**Document Management** [Return to Document Search](#)

This document is currently pending your review/feedback. You have been granted Edit capabilities. Use the Open/Edit Document buttons to launch the files and make any changes within the document. Use the Upload Revised Document button to load the modified document back into the system. When complete use the Mark as Reviewed button to return the document back to the contract administrator.

Contract ID: 000000000000000000000000000026

Description: Procurement Charges

Document Administrator: Calvin Roth

Created On: 08/25/2009 3:35PM

Begin Date: 05/30/2005      Expire Date:

Document Status: Pending Review      Owner: Supplier

**Collaboration Comments**

[Calvin Roth 2009-08-25-16.00.22.000000]

Please review as quickly as possible. Thanks

[Add Additional Attachments](#)  
[View Document History](#)  
[Send E-Mail](#)

This page appears with instructional text that describes any actions that you need to perform with the contract document. The page's content depends on the source transaction type, status of the document, and internal system settings and external user authority. The system provides messages describing the status of the document that you open. For example if you've already marked a document as reviewed, a message appears indicating that this document is not pending your review or approval at this time.

After receiving an external document for review or edit, you use this page to review document details, attributes, and history, edit documents, and respond to the internal contract administrator. Along with header information, the page provides links to more document details and buttons that you use to perform document tasks.

<b>Field or Control</b>	<b>Description</b>
<b>Open/Edit Main Document</b>	<p>External users click to download and open the document. This button is available if you have been defined as an external user who can edit documents for collaboration and signing.</p> <p>After you finish editing the Microsoft Word document, you must save the document as an .xml document type.</p>
<b>Upload Revised Document</b>	<p>External users click to access the Upload Contract Document page. You use the page to locate the saved document after you've made edits. Locate and upload the field from the client machine. If all validations pass, the system updates the version of the document with any document changes as part of the check-in process.</p> <hr/> <p><b>Note:</b> The uploading of the document does not delete the local files from the client machine. You should delete these files periodically.</p>
<b>View Main Document (Info Only)</b> (view main document (information only)	Click to view the document. You cannot make update the document. This button is available when you are not required to sign or approve the document.
<b>Save Comments</b>	Click to access the comments that you entered in the Collaborator Comments section.
<b>Mark as Reviewed</b>	<p>Click to indicate that you are finished with your document revision and have entered any comments. When you click the button, the system returns your collaboration details and all documents uploaded to the contract administrator for review and acceptance, and displays the Document Search page.</p> <p>When accessing the Document Search page, the system removes your collaboration document and edits; however, you can still access a history version of the document that was sent to you. To access the history for documents that you have reviewed, select the <b>All Documents</b> check box and click the <b>Search</b> button.</p>



<b>Field or Control</b>	<b>Description</b>
<b>Add Additional Attachments</b>	Click to access the Attachments and Related Authored Documents page. You use this page to add suggested attachments to the current document. After you upload the attachments, the button is replaced with the <b>View/Add Attachments/Related Documents</b> button. Attachments can then be reviewed internally by the document specialist before accepting them into the system
<b>View Document History</b>	Click to access the Document History page. You use this page to view history information to which you have access.  See <a href="#">Attachments and Related Authored Documents Page</a> .
<b>View Last Executed Main Document</b>	Click to open the version of the document that was executed by the internal contract administrator. This button appears after you review or sign a document and have view access to document history. You can only view document contents and only see executed documents if the system is configured to do so.
<b>View Attachments/Related Documents</b>	Click to access the Attachments and Related Authored Documents page. You use this page to view documents and document details that are linked to the current document.  See <a href="#">Attachments and Related Authored Documents Page</a> .
<b>No Attachments/Related Documents Exist</b>	This information appears when there are not any document attachments or related documents.
<b>Document Details</b>	Click to access the Document Details page. You use this page to view additional details for a document. For example, if user-defined fields are enabled, the fields appear on this page.  See <a href="#">Attachments and Related Authored Documents Page</a> .
<b>Send E-Mail</b>	Click to access the Send E-Mail page. You use this page to notify the administrator and other external users about the document.  See <a href="#">Send Email Page</a> .

Buttons that are available on this page include:

<b>Field or Control</b>	<b>Description</b>
<b>Return Without Signing</b>	Click to return the document without signing. This .
<b>View Main Document (Info Only)</b>	Click to open the last executed version of this contract document.

<b>Field or Control</b>	<b>Description</b>
<b>View Document</b>	Click to open the last executed version of this contract document.
<b>View Last Executed Main Document</b>	Click to open the last executed version of this contract document.
<b>View Last Executed Amendment File</b>	Click to open the last executed version of this contract document.
<b>View Last Executed Main Document</b>	Click to open the last executed version of this contract document.
<b>Upload Signed Document</b>	Click to place the document back into the signature process.
<b>Upload Signed Amendment File</b>	Click to place the document back into the signature process.

## Attachments and Related Authored Documents Page

Use the Attachments and Related Authored Documents page (CS\_DOC\_SUPP\_ATT) to view attachments and related authored documents for external documents.

Navigation:

**Manage Contracts > Maintain Contract Documents.** Click the **Contract Document** link on the Document Search page, and then click the **View Attachments/Related Documents** link on the Document Management page.

This page displays a listing of interested parties that have been defined by the contract administrator.

### Related Links

[Viewing and Uploading Attachments and Related Documents](#)

## Document History Page

Use the Document History page (CS\_DOC\_SUPP\_HST\_SP) to view external document history.

Navigation:

**Manage Contracts > Maintain Contract Documents.** Click the **Contract Document** link on the Document Search page, and then click the **View Document History** link on the Document Management page.

This example illustrates the fields and controls on the Document History page for suppliers.

**Document History**

Please note that only those rows specific to external actions are shown below.

Contract ID: 00000000000000000000000000000023

Document History				
Document Action	Updated By	Date/Time Stamp	Amendment	View Document
Dispatched	Calvin Roth	08/25/2009 2:16PM	1	
Executed	Calvin Roth	08/25/2009 11:58AM		
Dispatched	Calvin Roth	08/25/2009 11:58AM		

[Return](#)

This page provides a history of actions that have been performed against this contract document. History information is limited to external users based on the View External History field setting on the [Installation Options - Supplier Contract Management Page](#). The **External History Settings** field values control the history that displays on this page.

If a document has been dispatched, you can view the document, but the history does not provide who the document was sent to for reviews and approvals.

<b>Field or Control</b>	<b>Description</b>
<b>Document Action</b>	Displays the action that was performed against the document. Actions include, for example, that the document has been signed externally, executed, or routed for external review.
<b>Updated By</b>	Displays who performed the action against the document.
<b>Date/Time Stamp</b>	Displays when the action took place for updated version history for the document.
<b>Amendment</b>	Displays when separate amendment files are associated with the document. Click the link to access the amendment to view its state when the update was made. When multiple amendments exist, the system assigns a number to them. You can click the number to view a specific amendment.
<b>View Document</b>	Click to view the document that is associated with this row of data. The system opens the document using another browser session. You can review changes that have been made to the document if track changes have been used. After reviewing the document, close the browser window to exit the document.

## External Collaboration History Details Page

Use the External Collaboration History Details page (CS\_DOC\_SUPATT\_SP2) to view external collaboration history details.

Navigation:

**Manage Contracts > Maintain Contract Documents.** Click the **Contract Document** link on the Document Search page, click the **View Document History** link on the Document Management page, and then click the **Collaboration Details** button on the Document History page.

The page displays information about the external collaboration for a contract document. The information includes the contract ID and the date on which this document was collaborated and by whom. The Comments section contains any comments that have been made by internal and external collaborators.

<i>Field or Control</i>	<i>Description</i>
<b>View Document</b>	Click to open the collaborated document. This button appears when the document has not been edited.
<b>View Revised Document</b>	Click to open the collaborated document to view updates and changes that have been made to the document.
<b>File Name</b>	Displays the name of the file that was uploaded as a proposed attachment to the contract document. You can upload a proposed attachment during the external review and you are authorized to review and edit the document.
<b>Title and Document Description</b>	Display the name and description of the proposed attachment. You assign these when you upload the attachment.
<b>Date Time Stamp</b>	Displays the date and time for when an action was performed against the document.
<b>View</b>	Click to view the proposed attachment for the collaborated document. You cannot make updates to the proposed document.

## Send Email Page

Use the Send E-mail page (CS\_DOC\_EMAIL\_EXT) to send an e-mail to contract administrators and other external users.

Navigation:

**Manage Contracts > Maintain Contract Documents.** Select a document, and then click the **Send E-Mail** link on the Document Management page.

This example illustrates the fields and controls on the Send E-Mail page for suppliers.

**Send E-Mail**

You can send E-Mail to either the Contract Administrator OR to other external users who have access to this document. Based on who you are sending it to the appropriate URL link will be appended to the bottom of the email message.

Contract ID: 00000000000000000000000000000023

Subject:

Message:

Notify Contract Administrator

Copy Self

List of Users					
To	CC	Name	Title	User ID	Email ID
<input type="checkbox"/>	<input type="checkbox"/>	Sam Walker	VP Marketing	SUPPLIER	peoplesoft@peoplesoft.com

Customize | Find | View All | First 1 of 1 Last

Along with creating email content, you can use this page to select users who you want to send or copy on the email. These users have been defined by the contract administrator as interested parties and collaborators.

<b>Field or Control</b>	<b>Description</b>
<b>Subject</b>	Enter the main topic of the email.
<b>Message</b>	Enter the text of the email.
<b>Notify Contract Administrator</b>	Select to send a copy of this email to the internal contract administrator.
<b>Copy Self</b>	Select to send a copy of the email to yourself.

### List of Users

Use this grid to select users to whom you want to copy this email. You can select the primary recipients of the email and also copy other users by selecting the **To** and **CC** check boxes.

## Signing External Documents

### Page Used to Sign External Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Document Management Page</u>	CS_DOC_SUPP	Sign external documents using digital signatures. See <a href="#">Signing External Document from the Document Management Page</a> .

### Understanding External Document Signatures

PeopleSoft Supplier Contract Management enables supplier-side users to use Adobe Acrobat or Microsoft Word to digitally sign contract documents. When using an Adobe PDF file, external users must have at least Adobe Acrobat 8 reader installed. When using Microsoft Word 2007, or later version, the original editable version of the document (.xml format) from the contract administrator is locked, and a signable copy is created as a .docx format that is sent to the external document owner for signing.

**Note:** When using Microsoft Word 2007, or later version, for the signature method, all external users providing signatures are required to use Microsoft Word 2007, or later version.

In preparation to obtain digital signatures from external users, the internal contract administrator prepares the document for Microsoft Word or Adobe PDF file and sends or dispatches it to external reviewers and signers for reviews or signatures. When the system prepares a document, it locks the editable version of the document.

See [Working with Digital Signatures](#).

External signatures are obtained after the system prepares the document and before or after internal signatures or internal approval using the **Send to Contacts** or **Dispatch** buttons on the Document Management page. Using a PDF format to capture signatures is a recommended method since it requires internal and external users to have only the free Adobe Reader and a valid digital certificate for signing. Adobe has partnerships with several certificate authority companies. Adobe Acrobat also comes with a free method of creating signature certificates that external users might find useful to use for initial setup and testing of the system. See the Adobe Acrobat website for more information.

Digitally signing of documents by supplier-side users is defined and setup by the internal employee-side users. This internal user sets up the signature process for internal and external users, and includes defining who the internal and external signers are and the external user who is the primary contact and listed as a signer for the document.

See [Signing Documents Using the Adobe and Word Signature Methods](#).

To sign an external document:

1. Log in to the Supplier Portal.

You can also access the portal by using the link that is available in the email notification. If you log directly in to the Supplier Portal, the document's that are pending your review will appear in Documents Pending Review pagelet.

See [Using Document-Related Pagelets](#).

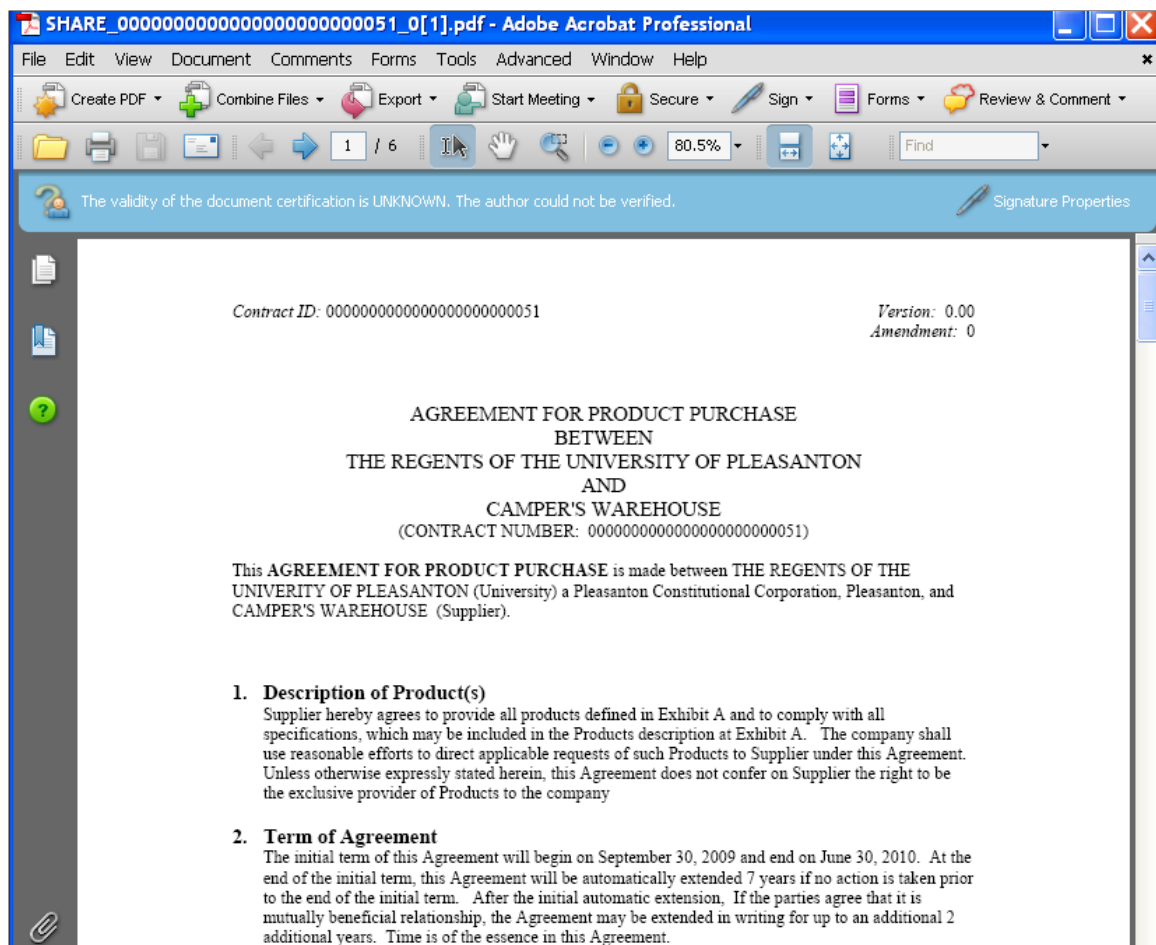
2. Select **Manage Contracts**, **Maintain Contract Documents** and search for documents pending your signature, and click the **Contract Document** link on the Search page.

The system displays the Document Management page.

3. Click the **Open Main Document for Signing** button.

The system opens the document using the Microsoft Word or Adobe Acrobat program. This example illustrates how the a PDF appears when it opens:

This example illustrates the fields and controls on the Example of Adobe Acrobat PDF for signature. You can find definitions for the fields and controls later on this page.



This page displays the actual contract and provides a signature block that you can use to sign the document.

4. (Optionally) Route the document offline to individuals who are required to sign the document within the supplier organization.

5. Select Sign on the PDF toolbar.

Signing documents is similar for suppliers as for internal users. For more information about digitally signing a document:

See [Understanding Digital Signatures](#).

## Signing External Document from the Document Management Page

Use the Document Management page (CS\_DOC\_SUPP) to sign external documents using digital signatures.

Navigation:

**Manage Contracts > Maintain Contract Documents.** Click a document link that requires your signature.

This example illustrates the fields and controls on the Document Management page. You can find definitions for the fields and controls later on this page.

**Maintain Contract Documents**

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**Document Management** [Return to Document Search](#)

This document is currently pending your signature/approval. As the primary owner you are responsible for routing the document offline to get the necessary signatures and then uploading the final signed version using the Upload & Return Signed Document button below. (Please note that this will return the document back to the contract administrator as part of the upload)

Contract ID: 00000000000000000000000000000025

Description: Volume Purchase Contract

Document Administrator: Calvin Roth

Created On: 08/25/2009 3:33PM

Begin Date: 05/27/2005      **Expire Date:**

Document Status: Pending Signature      **Owner:** Supplier

     [No Attachments/Related Documents Exist](#)

     [View Document History](#)

     [Send E-Mail](#)

Use this page to work with document signatures.

<b>Field or Control</b>	<b>Description</b>
<b>Document Status</b>	Displays the document status. The value for the field when the document is waiting for your signature is <i>Pending Signature</i> . After uploading the signed document, the system set the status to Signed.
<b>Owner</b>	Displays the user ID who is responsible for signing the document.



<i>Field or Control</i>	<i>Description</i>
<b>Open Main Document for Signing</b>	Click to open a document. After you open the document, you can use either Microsoft Word or Adobe Acrobat digital signatures to sign the document.  See <a href="#">Understanding Digital Signatures</a> .
<b>Upload Signed Document</b>	Click to upload the document after you have received other external signatures and have affixed your (the external document owner) digital signature.
<b>Return without Signing Document</b>	Click to return the document without a signature. When you return a document without a signature, you should provide comments about why the document was not signed. This provides the internal contract administration information on which to proceed with the contract document.

If you want to return a document without signing it, click the **Return Document Without Signing** button on the Document Management page. You can also provide comments about the document.

### Related Links

[Reviewing and Collaborating on External Documents](#)

## Maintaining External Contract Deliverables

### Pages Used to Maintain External Contract Deliverables

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Search Deliverables Page</a>	CS_CNT_AG_SEARCH	Search for contract deliverables.
<a href="#">Review Agreement Page</a>	CS_CNT_AG_RESULTS	Review contract deliverables.
<a href="#">Update Verifications Page</a>	CS_SS_CNT_VFY	Updating deliverable verification steps.

### Understanding External Contract User Access

The system secures external contract deliverables based on the external user being setup within the Contract Entry component Workflow Notifications page for a particular verification setup. Without this setup, the contract agreement and verification steps that appears deliverables to the external user are not accessible.

Typically, as part of the contract agreement setup, you define the types of notifications and timing required for the deliverable. The system sends notifications to external users with URLs that will take them directly to view the deliverable in question. In addition, external users can access the supplier

portal that you have enabled for them and navigate to review any deliverables for which they have access through menus.

## Search Deliverables Page

Use the Search Deliverables page (CS\_CNT\_AG\_SEARCH) to search for contract deliverables.

Navigation:

### Manage Contracts > Update Contract Deliverables

This example illustrates the fields and controls on the Review Contract Deliverables - Search Deliverables page.

**Update Contract Deliverables**

**Search Deliverables**

Contract ID:  \*Results to Include:

Vendor Contract Ref:

Activity Status:   Exclude Completed Status

Click on Verification Step link to update deliverables

Agreements Retrieved			
Contract	Contract Agreement	Verification Steps	Activity Status
000000000000000000000000000045 - HEADER	<a href="#">30 - Metric Agreement: Quality Performance</a>	<a href="#">20 - Supplier ISO Certification Verification</a>	Not Started
	<a href="#">50 - Certification of Material Usage</a>	<a href="#">10 - Certification for Graphite Usage</a>	Not Started

<b>Field or Control</b>	<b>Description</b>
<b>Contract ID</b>	Select a contract ID on which to base the agreements search.
<b>Results to Include</b>	<p>Select the search value that you want to use to locate contract agreements. Values include:</p> <ul style="list-style-type: none"> <li><i>Category Line Agreements Only</i>: Select to retrieve agreements assigned at the category line.</li> <li><i>Header Agreements Only</i>: Select to retrieve agreements assigned at the header level.</li> <li><i>Header, Item Line, Category Line</i>: Select to retrieve all agreements. This includes agreements at the contract header, item line, and category line. This is the default value for the field.</li> <li><i>Item Line Agreements Only</i>: Select to retrieve agreements assigned at the contract line level.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Supplier Contract Ref</b> (supplier contract reference)	Enter a supplier contract reference on which to base the search. This reference provides supplemental data for defining supplier contracts. The system retrieves those contracts that use this supplier contract reference and that have agreements associated with them. You define the reference on the contract header.
<b>Activity Status</b>	Select a status on which to base the search. This is the current status for the step. Values include: <ul style="list-style-type: none"> <li>• <i>Completed</i>: Select to search for verification steps that have been completed. The search results include completed steps that meet other search criteria you enter.</li> <li>• <i>Failed</i>: Select to search for verification steps that were not completed to the satisfaction of the contract administrator or in accordance with the agreed upon terms.</li> <li>• <i>In Process</i>: Select search for verification steps that have been started but are not yet been completed.</li> <li>• <i>Not Started</i>: Select to search for verification steps for which action has not begun.</li> </ul>
<b>Exclude Completed Status</b>	Select to retrieve a list of verification steps that still need to be updated and exclude the ones that are in a Completed status.

## Agreements Retrieved

This grid box displays the agreements that were retrieved based on the search criteria that you enter. The agreement information includes the contract to which the agreement belongs, the agreement definition, verification steps, and the agreement activity status. Only those agreements for which you are authorized as a verification step owner appear in the list. To view other agreements associated with the contract, use the Review Contract Deliverables menu option.

<b>Field or Control</b>	<b>Description</b>
<b>Contract</b>	Displays the contract and the contract part to which the agreement belongs, such as the header or contract line.
<b>Contract Agreement</b>	Click to access the <a href="#">Review Agreement Page</a> .
<b>Verification Steps</b>	Click to access the <a href="#">Update Verifications Page</a> . You use this page to update those verification steps for which you are the step owner.

<b>Field or Control</b>	<b>Description</b>
<b>Activity Status</b>	Displays the agreement status, such as whether it is not started or is in process.

For additional information about managing contract agreements, see [Understanding Contract Agreements](#).

## Review Agreement Page

Use the Review Agreement page ( CS\_CNT\_AG\_RESULTS) to review contract deliverables.

Navigation:

**Manage Contracts > Update Contract Deliverables.** Click the **Contract Agreement** link on the Search Deliverables page.

This example illustrates the fields and controls on the Review Contract Deliverables - Review Agreements page.

**Review Contract Deliverables**

---

**Review Agreement**

Contract: 0000000000000000000000000045 - HEADER [View Contract Document](#)

Vendor: CAMPER'S WAREHOUSE

Contract Status: Open      Begin Date: 04/01/2006      Expire Date: 06/30/2010

---

**Contract Agreements** Find | View All First 1 of 1 Last

Note: For Period and Cumulative Performance, these values are system calculated based on receipt information. Actual Result is manually entered.

Agreement: 30 - Metric Agreement: Quality Performance

Compliance Status: Not Set

Result Type: Metric      Metric Description: Quality Performance

Negotiated Result: 95.000000 % Net Received      Cumulative Performance: [99.49% - ACCEPTABLE](#)

Actual Result:      Perf. Tolerance: 2.00      For Period 5 - 2006: [96.67% - ACCEPTABLE](#)

Target Date: 04/01/2006      Last Metric Update: 05/09/2006 5:42:04AM

Notification Comments: Quality Performance: track the percentage of receipts that are received without being rejected due to quality for the contract

Financial Implication: 20% of the unit price penalty per each unit rejected due to quality

Compliance Comments:

[Return to Search Deliverables](#)

This page displays the details about the specific agreement that you selected in the Agreements Selected grid on the Search Deliverables page. The header provides basic information about the contract and supplier while the Contract Agreements group box displays the current agreement status, result types, target dates and other agreement details. Depending on the type of agreement verification for the deliverable, fields on the page will vary.

You cannot update fields using this page. You use the **Verification Steps** link on the Search Deliverables page to make changes. After you update the fields on that page, your updates appear on this page.

To view a contract document associated to the contract, click the **View Contract Document** button.

## Related Links

[Predefining Agreements](#)

## Update Verifications Page

Use the Update Verifications page (CS\_SS\_CNT\_VFY) to updating deliverable verification steps.

Navigation:

**Manage Contracts > Update Contract Deliverables.** Click the **Verifications Steps** link on the Search Deliverables page.

This example illustrates the fields and controls on the Review Contract Deliverables - Update Verifications page.

**Update Contract Deliverables**

---

**Update Verifications**

Contract: 000000000000000000000000000045 - HEADER [View Contract Document](#)

Vendor: CAMPER'S WAREHOUSE

Contract Status: Open      Begin Date: 04/01/2006      Expire Date: 06/30/2010

Agreement: 30 - Metric Agreement: Quality Performance

**Verification Steps** Find | View All | First | 1 of 1 | Last

---

Step: 20 - Supplier ISO Certification Verification [Send E-mail](#)

Due Date: 04/01/2006      Step Owner: Kenneth Schumacher

\*Activity Status: Not Started      Method: Date/Time

Date Verified:  31      Time Verified:

Notification Comments: Please provide most recent ISO9000 certificates

[Upload a File](#)

[Return to Search Deliverables](#)

Use this page to make updates to the contract agreement. The verification steps that you can update are only those for which you are defined as the verification step owner. If you are the external step owner, you can use an e-mail link to access this page. The body of the e-mail message contains the link that you use to access the PeopleSoft system. You must have the authorization to access the system.

Use this page to view detailed metrics performance related to agreements as long as it pertains to your role. For example, you cannot navigate to receipt or purchase order lists using performance detail pages if you are not authorized. Certain setup requirements are needed and the Update Procurement process for the contract must be run before metric information is available for viewing.

Depending on the type of agreement that you are updating, the available fields on the page might be different. See also [Reviewing and Updating Contract Agreement Statuses](#)

<i>Field or Control</i>	<i>Description</i>
<b>View Contract Document</b>	Click to access the Document Management page where you can view information about the contract document, including its history and collaboration details. See <a href="#">Document Management Page</a> .

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Contract</b>	Displays the contract ID along with the contract agreement element, such as the header, line, or category.
<b>Supplier</b>	Displays the supplier ID associated with the contract agreement.
<b>Category</b>	Displays the item category to which the agreement was assigned. This field appears for category-level agreements.
<b>Item ID</b>	Displays the line item to which the agreement is assigned. This field appears for line-level agreements.

## Verification Steps

Use this group box to update verification steps for which you are the step owner. Depending on the verification method, the system displays different fields.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Step</b>	Displays the step sequence along with the step description.
<b>Send E-mail</b>	Click to send an email to the verification step owner.
<b>Due Date</b>	Displays when the verification is required to be complete.
<b>Step Owner</b>	Displays the external step owner.
<b>Last User to Update</b>	Displays the step sequence along with the step description.
<b>Last Update</b>	Displays the step sequence along with the step description.

<b>Field or Control</b>	<b>Description</b>
<b>Activity Status</b>	<p>Select the status that you want to apply to this verification step. This status indicates the state at which you, as a verification step owner, want to define as the step's status to the contract administrator or manager. Status values include:</p> <ul style="list-style-type: none"> <li>• <i>Completed:</i> Select to indicate the task has been completed. Be sure to enter the verification results prior to setting the status to complete. If you do not enter attachments or comments, a date/time, or a yes/no indicator, the system displays a warning that the verification results have not yet been completed.</li> </ul> <hr/> <p><b>Note:</b> When you change the status to Complete and exit the page, you cannot make any further changes to the agreement. The page is display only when you access it again.</p> <hr/> <ul style="list-style-type: none"> <li>• <i>Failed:</i> Select to indicate the task is not completed in accordance with the agreed upon terms.</li> <li>• <i>In Process:</i> Select to indicate that the task has started but has not yet been completed.</li> <li>• <i>Not Started:</i> Select to indicate that no action has begun for this task.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Method</b>	<p>Displays the method by which a verification step owner indicates that a verification step has been completed.</p> <p>Verification methods include:</p> <ul style="list-style-type: none"> <li>• <i>Attaching Supporting Documents</i>: Indicates that the verification of this agreement step is accomplished by posting supporting documentation. When you are using this method, the Attachment grid box is available. You can click the <b>Upload a File</b> link to attach a supporting document. Click the <b>Upload another File</b> link to add additional attachments when an attachment exist for the verification step.</li> <li>• <i>Comments</i>: Indicates that you can verify the step by entering text or comments.</li> <li>• <i>Date/Time Stamp</i>: Indicates that you need to include a date and time stamp when the step is complete.</li> <li>• <i>Notify</i>: Indicates that action is not required to signify the step is completed. If you assign a workflow notification to the step, selected roles can be notified when the step's due date is approaching. You can use this method to send periodic informational notifications or reminders to various interested parties.</li> <li>• <i>Yes/No</i>: Indicates that you can update the verification step online using a yes or no response.</li> <li>• <i>System</i>: Indicates that the verification of this step should be provided by the system. This verification method is only valid for metric result types. When you have a metric result type, the system provides the results based on procurement history from PeopleSoft Purchasing to gather transactional agreement compliance information.</li> </ul> <p>See <a href="#">Understanding Agreement Metrics</a>.</p>
<b>Yes/No Verification</b>	<p>Select either <i>Yes</i> or <i>No</i> to indicate the verification status.</p> <p>This field is available when the <b>Method</b> field is a <i>Yes/No</i> verification.</p>
<b>Notification Comments</b>	<p>Enter any additional information that you want to provide to the contract administrator or manager about this verification step.</p>
<b>Verification Comment</b>	<p>Enter the justification comments for this verification step.</p>



<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Upload a File</b> andUpload Another File	Click to upload an attachment that serves as a supporting document for verifying this step. You cannot upload attachments when the verification activity status is Completed or Failed.

## **Attachments**

This grid box appears when the verification method is Attachment. You can upload attachments that support the verification step. This might be, for example, a quality checklist, that describes checks made to ensure the agreement is compliant. You can upload multiple attachments, view existing attachments and provide a description for new attachments. Select the Description tab to view or add an extended description.

## **Related Links**

[Reviewing and Updating Contract Agreement Statuses](#)



# Setting Up and Using Contract Syndication

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## Understanding Contract Syndication

This topic discusses:

- Contract syndication.
- Contract syndication steps.
- Contract syndication enterprise integration points.

## Contract Syndication

When you syndicate a contract, you publish the contract from a parent system (PeopleSoft) to another single or multiple third-party systems (remote systems). After syndication, the contract is available on the remote system from which remote users can create purchase orders and process receipts, vouchers, and returns to vendors.

The publishing process is achieved through PeopleSoft Integration Broker outbound message processing for the entire contract or for certain changes to the contract, such as new contract lines. After receiving the syndicated contract or its changes, remote users can create purchase orders or perform other actions using the syndicated contract.

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**Note:** Messages created in PeopleTools do not contain processing logic. All processing logic is defined using handlers. Handlers are specified in service operation definitions. Messages describe the contents of a service operation transaction. The use of the message term in the Syndication process refers to the process of sending and receiving messages.

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When the third-party system has the capability, its users can send certain updates back to the parent system so that you have an aggregate view of activity using the parent system. The Syndication feature makes it possible to share contracts by using a framework that enables contract execution processing in remote systems with overall contract management and performance tracking taking place in the PeopleSoft Purchasing application that resides on the parent system.

The Syndication feature in Supplier Contract Management facilitates the exchange of contract information between systems so that remote systems can use the centralized parent system's contract pricing information. Using this contract-sharing feature, you have the framework for managing contracts in disparate systems as the overall contract management and performance tracking takes place in the PeopleSoft system.

Using the Syndication feature, you can:

- Define and publish current contract information from Purchasing contracts to remote systems.
- Receive and consolidate contract-related activity from remote systems.

- Create a contract in Purchasing (contract import) from another system.

This is a general inbound contract message for the PeopleSoft system and is not specific to the Syndication process.

See the [Review Inbound Contract Exceptions Page](#).

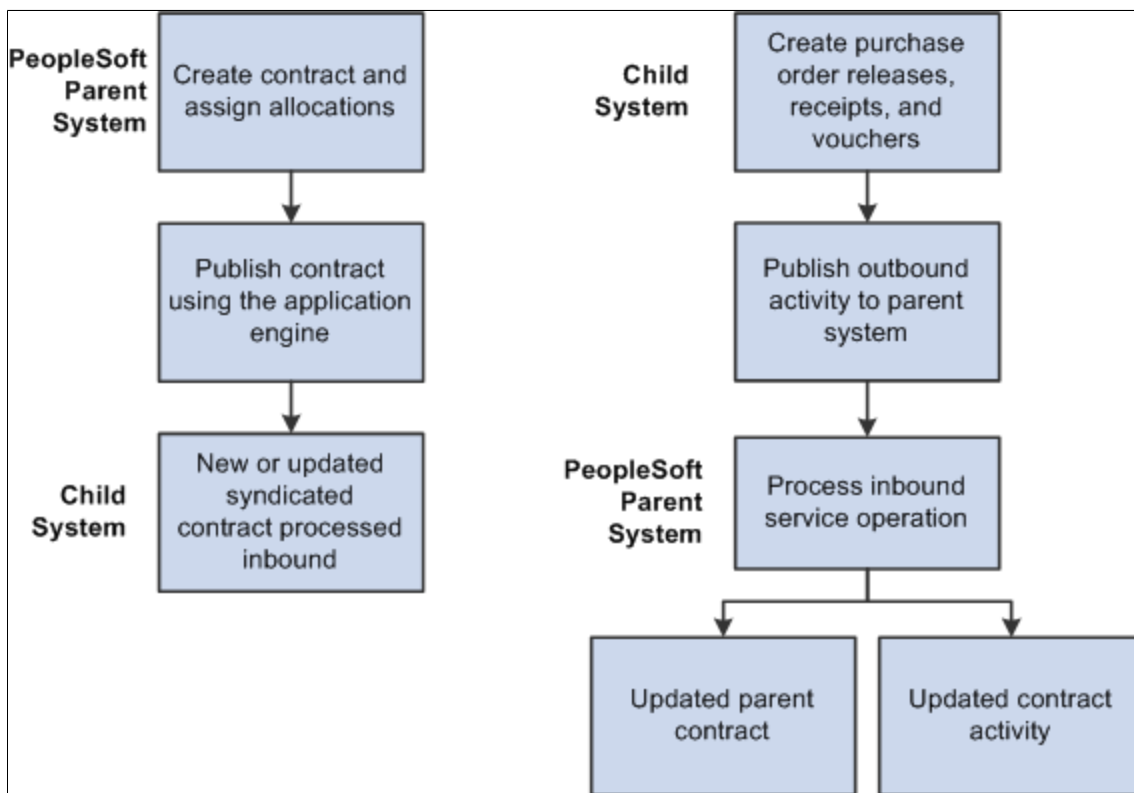
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**Note:** These topic describe the process for using the PeopleSoft system with third-party systems. It's assumed that remote systems use inbound and outbound message publishing programs that are compatible with PeopleSoft publishing programs. This means that any related setup data, such as suppliers, items, or units of measure, on the remote system supports the inbound contract message. Supplier Contract Management syndication syndicates only contract information and not the setup information.

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You can syndicate contracts from either the contract component, or schedule the syndication using batch processing. When syndicating a contract, the system initially publishes the entire contract. For subsequent syndications, you can either publish contract changes or republish the entire contract.

This diagram describes the syndication flow of a contract between parent and remote or child systems:



You maintain the syndicated contract using the PeopleSoft parent system, but you can use remote systems to release purchase orders, receipts, and vouchers against the contract. You can set up service operations and routings to process these activities which are sent back to the parent system.

For additional information about setting up the parent system, see [.Setup Requirements](#)

### Parent System

Using Syndication features on the parent PeopleSoft system, you can:

- Define contracts for syndication.
- Create a contract in PeopleSoft Purchasing by importing contract information from another system.
- Publish current versions of Purchasing contracts to remote systems.
- Receive and consolidate contract activity published from remote systems.
- Review summary and contract-line released details in the parent system.

## Remote System

Using Integration Broker publishing programs on the remote system, the system receives the outbound messages from the PeopleSoft parent system. Using the remote system enables third-party systems to:

- Process the inbound PeopleSoft parent contract and pricing as a syndicated contract.

You can make limited changes on the remote system, and you receive warnings that changes may be overwritten. For Integration Broker purposes, the system considers the PeopleSoft contract as a master contract as opposed to the contracts on the remote systems.

- Enter purchase orders against the syndicated contract that can have pricing information.
- Process releases, payments, and accounts payable activities against the contract using the remote system.
- Publish contract transaction activities back to the PeopleSoft parent system.

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**Note:** The remote system must support processing an inbound PeopleSoft contract as well as publish outbound contract transaction activity back to the PeopleSoft parent system in PeopleSoft's XML format. PeopleSoft does not deliver translations for inbound and outbound messaging for the remote system.

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See [Contract Syndication Enterprise Integration Points](#).

## Contract Syndication Steps

This topic provides high-level steps that you use with the Syndication feature to manage contracts between the PeopleSoft parent system and third-party remote systems. To syndicate the current version of a contract:

1. Use the parent system to set up the syndication system.

This includes defining installation options, nodes, and remote locations.

See [Setting Up Contract Syndication](#).

2. Create a contract in the PeopleSoft parent system.

Use the Purchase Order process option when adding a contract for syndication so that the PeopleSoft system can syndicate it to multiple remote systems. This process option supports sharing contract pricing information with multiple remote systems. You can only syndicate contracts that use other process options to a single remote system.

See [Defining Contracts for Syndication](#).

3. Syndicate the contract from the PeopleSoft parent system.

You define the remote systems that can use the contract and reference which remote systems are to receive the contract definition. When the processing option is Purchase Order, you can specify multiple remote systems.

When you syndicate a contract the first time, the system publishes the entire contract. The parent system tracks contract changes after the syndicated date and time so that with subsequent syndication of the contract, the system sends only the contract header, lines, and categories that have been modified.

---

**Note:** The child system's inbound contract processing must be capable of supporting net changes to contracts and correctly interpreting any new lines versus changed lines as a part of the inbound processing.

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See [Syndicating Supplier Contracts](#).

4. Remote systems receive contract information into their own processing framework.

This depends on the remote system. Using remote systems, you map the contract to a contract import definition that PeopleSoft publishes.

5. Remote systems execute contract lines and summarized and publish summary information back to the PeopleSoft parent system.

This information might include, for example, purchase orders, receipts, and voucher amounts. The remote system must include the capability to publish the contract activity back to the PeopleSoft parent system.

6. After receiving contract activities from the remote system, capture the parent activities.

You perform this process in the parent system to capture any additional parent activity information for contracts that use the Purchase Order process option. This is how the system creates a consolidated view of information for viewing in the Review Contract Activity component.

See [Capturing Parent Activities](#).

7. Review contract activity for both the parent and remote nodes.

Use this feature to review transactions against the parent contract. You can view both local (parent) and syndicated (remote) activity and navigate to view activities for specific remote systems.

See [Reviewing Contract Activities](#).

8. Publish the updated contract back to the remote systems using outbound messages.

You can publish the entire contract again or only the updates made to the parent contract definition.

See [Publishing Outbound Messages](#).

## Contract Syndication Enterprise Integration Points

Supplier Contract Management uses integration points to exchange information between the PeopleSoft system and third party-related programs or processes. Integration points process information (service operations) between the two systems.

- CS\_PROCUREMENT\_CNTRCT

Contract syndication is implemented with the service operation that you define using the CONTRACT\_SYNDICATION queue. The system uses the service operation to send the contract and contract changes to remote systems. The system sends changes for certain child records along with the parent record for outbound syndication.

- CS\_ACTIVITY\_CNTRCT

Inbound activity updates are implemented with the CS\_ACTIVITY\_CNTRCT service operation that you define in the CONTRACT\_SYNDICATION queue. The published activities from third parties can include summaries of purchase orders, receipts, and vouchers that are received and processed by this service operation.

---

## Understanding How to Load Contracts into the Parent System

Use the CS\_PROCUREMENT\_CNTRCT message and its service operation to load contracts into the parent system by activating the inbound routing for the CS\_PROCUREMENT\_CNTRCT\_IN service operation routing if it exists. If the inbound routing message does not exist, you can create a new routing.

External integration users must set the CS\_CNTRCT\_LOAD field in the syndication header record users must set the CS\_CNTRCT\_LOAD field in the syndication header record (CS\_CT\_HDR\_MWRK) to Y. Otherwise, the service operation handler processes the contract as a syndicated contract and future updates to the same contract will be applied to the system.

The system checks the contract ID against the cross reference table (CS\_SND\_PAR\_XREF) to see if the contract ID exists. If the ID exists, the system updates the contract, otherwise, it creates a new contract using the next auto-generated number.

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**Note:** When loading contracts into the parent system, the PeopleSoft Supplier Contract Management syndication system does not support category lines and exclusions. It uses the category record and segment only for contract syndication.

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When Integration Broker receives the service operation, the CS\_STAGE handler validates the incoming CS\_PROCUREMENT\_CNTRCT message. If the validation passes, the system loads the contract into the parent system. For more information about processing inbound exceptions:

See [Reviewing Inbound Contract Messages and Exceptions](#).

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**Note:** The Contract Load process only creates new contracts. It does not update existing contracts.

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## Setting Up Contract Syndication

### Setup Requirements

The PeopleSoft parent system is always the system of record for the contract. You create contracts on the parent system and syndicate them to the remote system. The remote system receives the contract and executes contract releases and summarizes the release activity and sends it back to the parent system.

## Setting Up the Parent System

A service operation definition consists of general information about an operation, such as its name, and alias if one has been defined. It also specifies an operation type, which determines how the operation is to be processed, synchronously or asynchronously. The `CS_PROCUREMENT_CNTRCT` is a service operation that is processed asynchronously. This means that the system creates the message and sends it, but does not suspend activity waiting for a response to the message. In addition, the service operation definition contains routings, which determine the direction, inbound or outbound, of the service operation. A service operation has one or more handlers, which contain and run the programming logic for sending or receiving the message and manipulating message content.

See "Understanding PeopleSoft Integration Broker," Incoming and Outgoing Message Flows, *PeopleTools: Integration Broker*

Use these steps to set up the parent system:

1. Activate the `CS_PROCUREMENT_CNTRCT` service operation.

This enables publishing contracts from the parent system. PeopleSoft delivers service operations in PeopleSoft Integration Broker with a default status of *Inactive*. You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft system. To activate the service operation:

- a. Select **PeopleTools > Integration Broker > Integration Setup > Service Operations**.
- b. Select `CS_PROCUREMENT_CNTRCT` in the **Service Operations** field.
- c. Click **Search**.

The service operation appears.

- d. Click the **Service Operation** link.

You specify messages for service operations in the Message Information section of the Service Operations - General page. Because the `CS_PROCUREMENT_CNTRCT` service operation is already available, it appears in the section. The message defines the structure of the data that is contained in the service operation. The service operation type determines the number of messages and message types (request or response) that you specify.

- e. Set the `CS_PROCUREMENT_CNTRCT` service to *Active* using the **Active** check box in the **Default Service Operation Version** group box, and click the **Save** button.

---

**Note:** In addition to outbound syndication, you can also use the `CS_PROCUREMENT_CNTRCT` service operation with inbound contract message processing to load contracts into the parent system. However, contract syndication in the parent PeopleSoft system uses the outbound service operation only. See [Understanding How to Load Contracts into the Parent System](#)

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- f. Select the **Handlers** tab.

The page provides summary information about handlers that have been added to an operation. Two individual server processes work together to handle incoming requests. One server process functions as a dispatcher, while the other functions as a handler. You can specify an application class as a handler for a service operation. The `CS_PROCUREMENT_CNTRCT` service operation uses the application class handler `CS_STAGE`.



See "Sending and Receiving Messages," *PeopleTools: Integration Broker*

- g. Ensure that *Active* is selected in the **Status** field on the Handlers tab, and click the **Save** button.
- h. Select the Routings tab.

This page provides access to routing information that have been added to an operation. Routings determine the direction, outbound for syndication, of the service operation. The routing page is where you specify the sending and receiving node information. The **Sender Node** field value should be the default local node for the CS\_PROCUREMENT\_CNTRCT\_OUT routing. This value appears on the Nodes page and contains *Y* in the Local Node Name column for the node.

The receiver node for the CS\_PROCUREMENT\_CNTRCT\_OUT routing should be *PSFT\_XOUTBND*.

If you have defined a different external node for use with a particular remote system, you can create a new routing and enter that node in the **Receiver Node** field. There must be a routing created for each remote system where the sender node is the default local node, and the receiver node is the remote node.

- i. Select the routings you are going to use, and click the **Activate Selected Routings** button.
- j. Click the **Save** button.

See Understanding Integration Setup, *PeopleTools: Integration Broker*

2. Activate the CS\_ACTIVITY\_CNTRCT service operation to enable receiving activity summaries into the parent system.

This step is the same as step 1 except for the Routings tab. You only need to activate the inbound routing where the **Sender Node** is *ANY* and the **Receiver Node** is the default local node.

3. Use the Gateways page to define gateways for parent and remote systems.

The *PARENT* gateway, points to the application server/web server used to access the local/parent database. The *REMOTE* gateway points to the application server/web server used to access the remote database. To access the page, select **PeopleTools > Integration Broker > Configuration > Gateways**.

See "Managing Integration Gateways," *PeopleTools: Integration Broker*

4. Set the Queue Status for the CS\_CONTRACT\_SYNDICATION queue to *Run*.

To set the status:

- a. Select: **PeopleTools > Monitor Service Operations > Administration > Queue Status**.
- b. Scroll to the CS\_CONTRACT\_SYNDICATION queue.
- c. Click the **Run** button if the Queue Status is *Paused*.

The status should be *Running*.

5. Define the parent and remote system nodes and the transactions used for syndication.

To access the page, select: **PeopleTools** > **Integration Broker** > **Integration Setup** > **Node**. To define settings for the parent system:

- a. Use the Nodes search page to open the node that has the **Default Local Node = Y**.

This defines the application server/web server that connects to the parent system.

- b. Click the Connectors tab.

- c. Enter the gateway and connector ID for the parent system.

Normally, the gateway ID is LOCAL and the connector ID is PSFTTARGET. You must define the remote node on the parent system, and add a routing for the CS\_PROCUREMENT\_CNTRCT service operation as described in Step H1.

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**Note:** If a connector does not have properties, you can use the Gateways page to setup gateway and connector IDs. Step 3 provides the purpose and a link for more information about defining the properties.

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**Note:** If you are loading contracts into the parent system (this is not a syndication feature), you must activate the inbound routing for the CS\_PROCUREMENT\_CNTRCT service operation.

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6. Use the [Installation Options - Supplier Contract Management Page](#) to set up the application for syndication use.

## Summary Information for Remote Systems

This section provides considerations for setting up remote systems. Remote systems require the capability to subscribe to contract messages defined with the structure contained in the PeopleSoft parent system CS\_PROCUREMENT\_CNTRCT service operation.

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**Note:** It's assumed that the remote system contains a contract structure that can have related purchase order and voucher-related activity placed against it similar to that of the PeopleSoft parent system. The mappings and implementation required for the structure depend on the remote system capability.

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You should also consider these capabilities for remote systems:

- Process mappings of contract messages to remote systems contract structure.
- Process the addition of new contracts and changes to existing contracts based on information sent in the CS\_PROCUREMENT\_CNTRCT service operation structure.
- Create and publish summary activity information for related purchase orders, receipts, and vouchers in the format required for the CS\_ACTIVITY\_CNTRCT service operation.

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## Defining Contracts for Syndication

To use this feature, you must select the **Allow Contract Syndication** check box in the Process Options section of the [Installation Options - Supplier Contract Management Page](#)

## Pages Used to Define Contracts for Syndication

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
"Contract Entry Page - Add a New Value" (PeopleSoft Source to Settle Common Information)	(Not applicable)	Create a new contract and process option.
<u>Contract Entry - Contract Page (Syndicated)</u>	CNTRCT_HDR	Enter syndication details.
<u>Create Releases Page</u>	CNTRCT_SCHEDULE	Create releases against syndicated contracts.
<u>Review Releases Page</u>	CNTRCT_RLS_HIST	View staged releases for syndicated contracts.
<u>Contract Item Release Details for Line Page</u>	CS_LINE_RLSD_SEC	View syndicated line released details.
<u>Contract Category Release Details for Line Page</u>	CS_CAT_RLSD_SEC	View syndicated category line released details.

## Creating a Syndicated Contract

Use the "Contract Entry Page - Add a New Value" (PeopleSoft Source to Settle Common Information) to create a new contract and select a process option.

When creating a contract, the process option determines how the system syndicates the contract.

<b>Field or Control</b>	<b>Description</b>
<b>Process Option</b>	<p>Depending on the process option, you can either syndicate the contract to multiple remote systems or to a single remote system.</p> <p>Values that allow syndication are:</p> <ul style="list-style-type: none"> <li>• <i>General Contract</i>: When you syndicate a contract that uses this process option, you can only send the contract to a single remote system.</li> <li>• <i>Prepaid Voucher</i>: When you syndicate a contract with this process option, you can only send the contract to a single remote system.</li> <li>• <i>Prepaid Voucher with Advanced PO</i>: When you syndicate a contract that uses this process option, the remote system can process releases, but purchase order information is not available. You must enter purchase order information on the remote system when creating releases for contracts with this process option.</li> <li>• <i>Purchase Order</i>: When you syndicate a contract that uses this process option, you can syndicate the contract to multiple remote systems and create releases against the contract.</li> <li>• <i>Recurring PO Voucher</i>: When you syndicate a contract that uses this process option, remote systems can process releases, but purchase order information is not available. You must enter purchase order information on the remote system when creating releases for contracts with this process option.</li> <li>• <i>Recurring Voucher</i>: When you syndicate a contract that uses this process option, you can only send the contract to a single remote system.</li> <li>• <i>Release to Single PO Only</i>: When you syndicate a contract that uses this process option, remote systems can process releases, but purchase order information is not available. You must enter purchase order information on the remote system when creating releases for contracts with this process option.</li> </ul>

## Contract Entry - Contract Page (Syndicated)

Use the Contract Entry - Contract page (CNTRCT\_HDR) to enter syndication details.

Navigation:

**Supplier Contracts** > **Create Contracts and Documents** > **Contract Entry**. Click the **Add** button on the search page.

This example illustrates the fields and controls on the Contract Entry - Contract page showing the Contract Syndication link in the Header section.

**Contract Entry**  
**Contract**

SetID SHARE  
Contract ID 00000000000000000000000000000000  
\*Status   
Administrator/Buyer

**Contract Version**  
Version 1 Status Current  
Approved Date 11/11/2014

▼ **Authored Document**  
Authored Status Pending External Collaboration Maintain Document  
Document Version 0.00 Sponsor  
Description Keyboard Purchase Agreement Department  
Amendment 0 Created Date/time 11/11/2014 4:31PM  
Document Administrator VP1 Last modified date 11/11/2014 4:32PM

▼ **Header** Add Comments  
Contract Style Purchase Order Contract Activities  
Process Option Purchase Order Primary Contact Info  
Supplier MIDTON-001 Contract Header Agreement  
Supplier ID USA0000010 Midton Computer Supplies Contract Releases  
Primary Contact Contract Syndication  
Supplier Contract Ref

Use this page to enter contract data and review syndication details for contracts that have been syndicated. This topic discusses the fields used in the syndication. A message appears next to the **Status** field that indicates if the contract has been syndicated.

The **Contract Releases** link only appears when the Process Option is not Purchase Order and the contract is syndicated. The system prevents releases from the parent system against contracts that use the other contract process options.

The parent system controls the syndication process. Changes to the content of the contract must be made in the parent system, and syndicated to the remote system. You can make limited changes to the syndicated contract in the remote system, but the system warns you when the changes might be overwritten by the parent system. You cannot insert new line items, but you can modify existing line items such as line comments, distributions, and agreements.

Because a contract can have releases in syndication, but not in the parent, you cannot delete the line in the parent after the contract is syndicated.

<b>Field or Control</b>	<b>Description</b>
<b>Status</b>	A contract must be in an <i>Approved</i> status before you can syndicate it.
<b>Contract Release</b>	Click to access the <a href="#">Create Releases Page</a> . This page provides released line amounts and quantities, along with remaining line quantities, and allows you to define and stage contract releases. You can also view release history details about contract lines that have been syndicated.

## Related Links

"Creating Procurement Contracts" (PeopleSoft Source to Settle Common Information)

Syndicating Supplier Contracts

### Create Releases Page

Use the Create Releases page (CNTRCT\_SCHEDULE) to create releases against syndicated contracts.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Contract Entry.** Click the **Contract Releases** link on the Contract Entry - Contract page.

This example illustrates the fields and controls on the Create Releases page.

Use this page to create releases against syndicated purchase orders and nonsyndicated contracts. This page provides a means to specify the interval between purchase orders, generate a schedule for the series of purchase orders, and create the releases of the orders. The releases and available options are based on the specified business unit.

Since you can only create releases in the remote system for syndicated contracts that are not Purchase Order process option contracts, the Contract Releases link is not available for other contract process options.

To further prevent the release of contract quantities, the system prevents you from selecting or copying a general contract ID that has been syndicated. You can copy a syndicated general contract to a new syndicated general contract, but this does not create a release.

<b>Field or Control</b>	<b>Description</b>
<b>Stage</b>	Click to stage qualifying purchase orders. You can stage a release for approved contracts only. When you click the button, the system populates the release tables from which the contract Purchase Order process option retrieves data.

**Related Links**

"Entering Contract Release Information" (PeopleSoft Source to Settle Common Information)

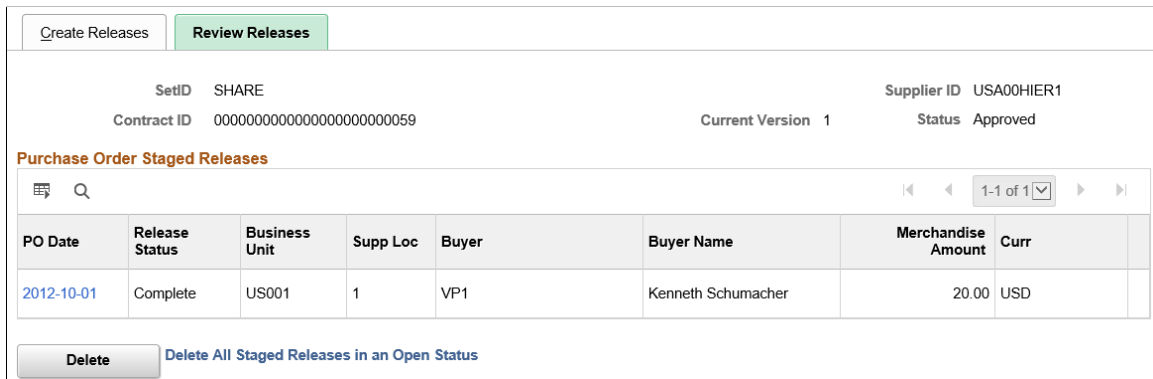
**Review Releases Page**

Use the Review Releases page (CNTRCT\_RLS\_HIST) to view staged releases for syndicated contracts.

Navigation:

Select the **Review Releases** tab on the Create Releases page.

This example illustrates the fields and controls on the Review Releases page.



Use this page to view staged releases against a syndicated purchase order and a nonsyndicated contract.

Use the **PO Date** (purchase order date) link to access item descriptions and add comments about the staged releases.

**Related Links**

"Review Staged Releases Page" (PeopleSoft Source to Settle Common Information)

**Contract Item Release Details for Line Page**

Use the Contract Item Release Details for Line page (CS\_LINE\_RLSD\_SEC) to view syndicated line released details.

Navigation:

From the Contract Entry - Contract page, Contract Items - Lines section, select the Release Amounts or Release Quantities tab. Click the **Released Details** link.

This example illustrates the fields and controls on the Contract Item Release Details for Line page.

Contract Line Released Detail						
<b>Contract Entry</b>						
<b>Contract Item Release Details for Line 1</b>						
Contract ID	00000000000000000000000000059		Supplier	USA00HIER1-001		Description
Line	1		Item ID	EX2016		
Total Line Released Amount	20.000 USD		Total Line Released Quantity	1.00 EA		
Maximum Line Amount	30.00		Maximum Line Quantity	0.00		
Remaining Amount	10.000		Remaining Quantity	0.0000		
Remaining Amount %	33.33		Remaining Quantity %	0.00		
<b>Release Details</b>						
<input type="text"/> <input type="text"/>			<span>1-2 of 2</span>			
Syndicate Type	Subscribing Node	Description	Line Released Amount	Currency	Line Released Quantity	UOM
Remote			0.000	USD	0.00	EA
Parent	E92INFV	Financials/Supply Chain	20.000	USD	1.00	EA

If the contract process option type is Purchase Order and the contract has been syndicated, use this page to view details about the released amount and quantities, and view the item description. The system displays amount values in the currency unit of measure quantities in the inventory unit of measure.

Values on the page represent a single line item on the contract that has been processed through syndication.

<b>Field or Control</b>	<b>Description</b>
<b>Total Line Released Amount</b>	Displays the total amount released to date for this contract line item. The amount value is expressed in the contract header currency.
<b>Total Line Released Quantity</b>	Displays the total quantity released to date for this contract line item. The quantity value is expressed in the inventory unit of measure.
<b>Maximum Line Amount</b>	Displays the total amount that the released amounts of this contract line item should not exceed.
<b>Maximum Line Quantity</b>	Displays the total quantity that the release quantity of this contract line item should not exceed.
<b>Remaining Amount</b>	Displays the amount available for release for this contract line item. This field appears when the maximum line amount is greater than zero. The system calculates the value by subtracting the line amount released from the maximum line amount.



<b>Field or Control</b>	<b>Description</b>
<b>Remaining Quantity</b>	Displays the quantity available for release for the contract. This field appears when the maximum line quantity is greater than zero. The system calculates the value by subtracting the line quantity released from the maximum line quantity.
<b>Remaining Amount % (remaining amount percentage)</b>	Displays the percentage of the amount that is available for release for the contract. This field appears when the maximum line amount is greater than zero. The system calculates the value by dividing the amount remaining by the maximum line amount.
<b>Remaining Quantity % (remaining amount percentage)</b>	Displays the percentage of the quantity that is available for release for the contract. This field appears when the maximum line quantity is greater than zero. The system calculates the value by dividing the quantity remaining by the maximum line quantity.

## Release Details

Use this grid to review details about individual node activities that resulted in the item release.

<b>Field or Control</b>	<b>Description</b>
<b>Syndication Type</b>	Indicates if the amount that was released at the <i>Parent</i> or <i>Remote</i> node.
<b>Subscribing Node</b>	Indicates the node from which the item release occurred. A description of the node also displays in the grid.
<b>Line Released Amount</b>	Displays the total line item amount that was released for this node.
<b>Line Released Quantity</b>	Displays the total line item quantity that was released for this node.

## Related Links

"Review Staged Releases Page" (PeopleSoft Source to Settle Common Information)

## Contract Category Release Details for Line Page

Use the Contract Category Release Details for Line page (CS\_CAT\_RLSD\_SEC) to view syndicated category line released details.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Contract Entry.** Select the **Release Amounts** tab in the Contract Categories Lines grid on the Contract page. Click the **Release Details** link.

This example illustrates the fields and controls on the Contract Category Release Details for Line page.

Contract Entry								
Contract Category Release Details for Line 1								
Contract ID:	RK-PO1	Vendor:	ERNIE'S-001					
Line:	1	Category:	CAMPING					
Total Line Released Amount:		1,250.000 USD						
Maximum Line Amount:		0.000						
Remaining Amount:		0.000						
Remaining Amount %:		0.00						
Release Details				Customize	Find	First	1-2 of 2	Last
Syndicate Type	Subscribing Node	Description	Line Released Amount	Currency				
Remote	PSFT_XOUTBND	External Outbound node	0.000	USD				
Parent	PSFT_EP	PS FSCM - Fin, Supply Chain	1,250.000	USD				
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/>								

If the contract process option type is Purchase Order and the contract has been syndicated, use this page to view details about the released amount and quantities, and view the category description. The system displays amount values in the currency unit of measure quantities in the inventory unit of measure.

Values on the page represent a single category line item on the contract that has been processed through syndication.

See [Contract Item Release Details for Line Page](#).

## Syndicating Supplier Contracts

Use the [Installation Options - Supplier Contract Management Page](#) to indicate that syndication should be enabled by selecting the Allow Contract Syndication check box in the Processing Options section.

### Page Used to Syndicate Supplier Contracts

Page Name	Definition Name	Usage
<a href="#">Contract Syndication Page</a>	CS_CNTRCT_SNDCT	Syndicate contracts.

### Contract Syndication Page

Use the Contract Syndication page (CS\_CNTRCT\_SNDCT) to syndicate contracts.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Contract Entry.** Click the **Contract Syndication** link on the Contract page.

This example illustrates the fields and controls on the Contract Syndication page.

**Contract Entry**

### Contract Syndication

SetID: SHARE

Contract ID: PRINTER\_EQUIPMENT

Status: Approved

**Contract Version**

Version: 1      Status: Current

**Syndicate**
Customize | Find | | First 1 of 1 Last

Syndicate
Syndicate Status
Syndicate Options

Subscribing Node	Description	Message Content	Syndicate From	Remote Contract Admin E-mail	Syndicate
<input type="text"/>		Entire Contract	07/06/2009	<input type="text"/>	<span style="border: 1px solid black; padding: 2px 5px;">Syndicate</span> <span style="margin-left: 5px;">+</span> <span style="margin-left: 5px;">-</span>

#### Release Summary

Maximum Amount:	250,000.00 USD
Open Item Amount Released:	-11,361.62
Total Line Released Amount:	0.00
<b>Total Amount:</b>	<b>22,723.24</b>
Remaining Amount:	227,276.76
Remaining Percent:	90.91

**Release Details**
Customize | Find | | First 1-2 of 2 Last

Syndicate Type	Subscribing Node	Description	Open Item Amount Released	Total Line Released Amount	Currency Code
Remote			0.000	0.000	USD
Parent	PSFT_EP	PS FSCM - Fin, Supply Chain	0.000	0.000	USD

[Contract Entry](#)

Use this page to set up a contract for syndication by defining the nodes to which the contract can be syndicated and to publish the contract. The page displays the contract version and status of the contract version. You can also view the syndication status, update syndication options, and review summary release information for purchase order contracts. To make the Contract Syndication link available, make sure that the installation options are defined to enable contract syndication.

The link is not available when:

- The contract process option type is not a purchase order and there are releases against the contract.
- The contract is in a Closed, On-Hold, or Cancel status, and it has not been syndicated.

You can only syndicate approved contracts. Contracts in an Open status cannot have transactions occur against them. You can publish changes for contracts in Closed, Cancelled, and On-Hold statuses as long as the contract was previously syndicated.

If the contract process option type is Purchase Order, you can assign multiple nodes to the contract, and review summary and line-level release information for both the parent and remote system. If the contract process option type is not a Purchase Order type and the contract is syndicated, the system prevents releases against the contract in the parent system. In this case, the Contract Releases link does not appear for the contract. You cannot manually assign the contract to the online request or purchase order and the contract will not be available when sourcing a requisition to a purchase order.

Use the Syndicate tab to identify the syndicate nodes to which the contract will be published and use manual control over syndication. If this is the first time the contract has been published, the system publishes the entire contract to remote systems regardless of field values.

You can syndicate the contract to multiple subscribing nodes by adding a new row. You can control the syndication process for each subscribing node.

<b>Field or Control</b>	<b>Description</b>
<b>Contract ID</b>	Displays the contract identifier for which you are defining syndication information.
<b>Status</b>	Displays the status of the contract that you are using. The contract must be in an Approved status before you can syndicate it.
<b>Version</b>	Displays the version of the contract that you are working with. This value is available when version tracking is enabled.
<b>Status</b>	Displays the status of the contract. You can syndicate only contracts that are the Current version of the contract.
<b>Subscription Node</b>	<p>Displays the node to which this contract has been syndicated. If the contract has not been syndicated, select a node to which you want to syndicate the contract. Syndication can only occur if you define the node.</p> <p>You can also add rows if the contract processing option type is Purchase Order. You can delete rows if the contract has not been syndicated.</p>
<b>Description</b>	Displays the description of the node. This is defined when you create the node.
<b>Message Content</b>	Determines how the system processes messages related to this contract. If the contract has not been syndicated to the specified node, the field value is <i>Entire Contract</i> , and the field is disabled. If the contract has been syndicated, the field is available for entry. Select <i>Changes Only</i> to indicate that when the system syndicates the contract again, only updates against the contract are processed for syndication. Select <i>Entire Contract</i> to indicate that the entire contract should be syndicated again. The system sets this field to <i>Changes Only</i> after each syndication.

<b>Field or Control</b>	<b>Description</b>
<b>Syndicate From</b>	<p>Displays the last date on which the contract was syndicated. If the contract has not been syndicated to the subscription node, the contract entry date appears in the field and the field is disabled.</p> <p>If the contract has been syndicated, the last syndicated date becomes the default value for this field, and indicates that contract changes since the last syndication will be published. You can select a new date; however, the system checks to verify that the date selected is less than or equal to the last syndicated date. If the date doesn't meet this validation, the system displays a warning message indicating the problem.</p>
<b>Remote Contract Admin E-mail</b> (remote contract administrator email)	Identifies who is responsible for processing the contract on the remote node.
<b>Syndicate</b>	<p>Click to send the contract to the remote system. When you syndicate a contract, the system ensures that a valid subscription node has been selected and validates the contract header status at these statuses:</p> <ul style="list-style-type: none"> <li>• <b>Approved:</b> <ul style="list-style-type: none"> <li>• You can create releases in multiple systems for Purchase Order process option contracts.</li> <li>• For contracts that are not Purchase Order process option contracts, the system verifies that the contract has not been referenced on a request for quote or purchase order.</li> <li>• Verifies that contract does not have any staged releases.</li> </ul> </li> <li>• <b>Closed, On-Hold, and Canceled:</b> <ul style="list-style-type: none"> <li>• Verifies that the contract was previously syndicated.</li> </ul> </li> </ul> <p>When you click the <b>Syndicate</b> button, the system runs an application engine process that formats and publishes the message. You can also run the program in batch, which enables you to syndicate multiple contracts by SetID, supplier ID, and contract ID. When you access the Contract page again, the system provides an indicator that the contract has been syndicated.</p>

See [Publishing Outbound Messages](#).

### Release Summary

Use this grid to review summaries and details about syndicated Purchase Order process option contracts. The summary shows values for remote nodes and the parent system. These values include entire contract values and line-item release amounts.

If the contract's process option type is Purchase Order and the contract has been syndicated, use the **Released Details** link to view additional details about each contract line released. You can access the link using the Released Amounts and Released Quantities tabs on the **Lines** grid on the Contracts page.

See [Contract Item Release Details for Line Page](#).

<b>Field or Control</b>	<b>Description</b>
<b>Maximum Amount</b>	Displays the total amount this entire contract release amounts should not exceed. The total released amount of all lines plus the amount released for open items must not exceed this amount. This value is expressed in the contract header currency.
<b>Open Item Amount Released</b>	Displays the amount released for open items in an open item contract. This information appears only if the contract is referenced on a purchase order using open item referencing.
<b>Total Line Released Amount</b>	Displays the total amount released to date. The value is expressed in the contract header currency.
<b>Total Amount</b>	Displays the total amount released for the contract.
<b>Remaining Amount</b>	Displays the amount available for release for the contract. This field appears when the maximum line amount is greater than zero. The system calculates the value by subtracting the line amount released from the maximum line amount.
<b>Remaining Percent</b>	Displays the percentage of the amount that is available for release for the contract. This field appears when the maximum line amount is greater than zero. The system calculates the value by dividing the amount remaining by the maximum line amount.

### Release Details

This grid provides the syndication type and node. It also provides the open-item amount that has been released and the total line-released amount.

See [Contract Syndication Page](#).

### Syndicate Status

This tab provides a high-level view of the syndication history for a contract.

<b>Field or Control</b>	<b>Description</b>
Syndicate Contract ID	Displays the contract ID created on the remote system. The system updates this field when it processes the contract activity.
Last Syndicated Date Time	<p>Displays the last time the contract or changes to the contract were updated. The system updates the field each time the contract is published.</p> <p>When the system formats the publish message and the message content is Changes Only, it checks the date and time and if the value is on the record is greater than the last syndicated date and time for the node, the system includes the record in the message. If a child record has been changed, but not the parent, the system publishes both the parent and child.</p> <p>If a parent record has changed, but not the child, the system publishes only the parent record. When the system publishes contract changes to the remote node, it updates this field with the new date and time.</p>
Original Syndication	Displays the first date on which the contract was published.

## Syndicate Options

Use this tab to review and update syndication options. These are contract values that you can include in the syndicated contract. Administrators can initially set the default values for these check boxes using installation options. You can override the default values.

<b>Field or Control</b>	<b>Description</b>
<b>Contract Defaults</b>	Select to include purchase order defaults as part of the syndicated contracts. The defaults include header and shipping information and you can view them by clicking the <b>PO Defaults</b> link on the Contract Entry page.

<b>Field or Control</b>	<b>Description</b>
<b>Miscellaneous Charges</b>	<p>Select to include miscellaneous charges in the syndicated contract. You can add miscellaneous charges to purchase orders in addition to sales and use taxes and value-added taxes. Miscellaneous charges can include freight, setup, insurance, and a variety of other costs incurred to deliver purchased goods to a location. The system considers these miscellaneous charge conditions and issues error messages if they are not met:</p> <ul style="list-style-type: none"> <li>• The miscellaneous charge code is defined only once.</li> <li>• An amount must be specified if a miscellaneous charge code exists.</li> </ul>
<b>Milestones</b>	<p>Select to include milestone information in syndicated contracts. Milestones are points in a contract cycle, such as a specified period of time or a percentage of contract fulfillment, at which an approval or reevaluation is made by contract participants. Often, partial compensation is tied to a milestone.</p> <p>Supplier Contract Management verifies the release of milestone lines for merchandise amount changes during syndication. Milestones can be quantified by amount or percentage.</p> <p>The system considers these milestone conditions and issues error messages if they are not met:</p> <ul style="list-style-type: none"> <li>• If the milestone is by amount, the amount cannot be negative if the merchandise amount is not negative.</li> <li>• Only lines with a negative merchandise amount can contain negative milestone amounts.</li> <li>• The milestone amount on the milestone line cannot exceed the merchandise amount on the contract line.</li> <li>• The sum of the milestone line amounts must equal the merchandise amount on the contract line.</li> <li>• The percentage complete cannot exceed 100 percent.</li> <li>• Total milestone percentages for the contract line cannot exceed 100 percent.</li> </ul>



<b>Field or Control</b>	<b>Description</b>
<b>Shipping Schedules</b>	<p>Select to include syndicated shipping schedules in syndicated contract information. The system verifies that the line quantity on the shipping template is greater than the minimum line quantity.</p> <p>The system issues an error message if Purchasing is installed and the voucher source is a recurring purchase order voucher, and the schedule quantity does not equal one.</p>
<b>Distributions</b>	<p>Select to include distributions in syndicated contracts. During syndication, the system processes distribution percentages and amounts and verifies that the distribution amount does not exceed the contract line amount. The system considers these conditions and issues error messages if they are not met:</p> <ul style="list-style-type: none"> <li>• Distribution must percentages equal 100 percent for the business unit.</li> <li>• The sum of the distribution amount must equal the merchandise amount for the business unit.</li> <li>• If PeopleSoft Inventory is installed and the contract line item is an inventory item, the inventory business unit must be consistently applied to the distribution lines.</li> <li>• The item is defined in the inventory business unit on the distribution line.</li> <li>• The distribution merchandise amount cannot exceed the contract line amount.</li> </ul>

## Capturing Parent Activities

### Page Used to Capture Parent Activities

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Parent Contract Activity Capture Page</u>	CS_CT_PAR_ACT_CAP	Capture parent activities.

## Understanding Activities

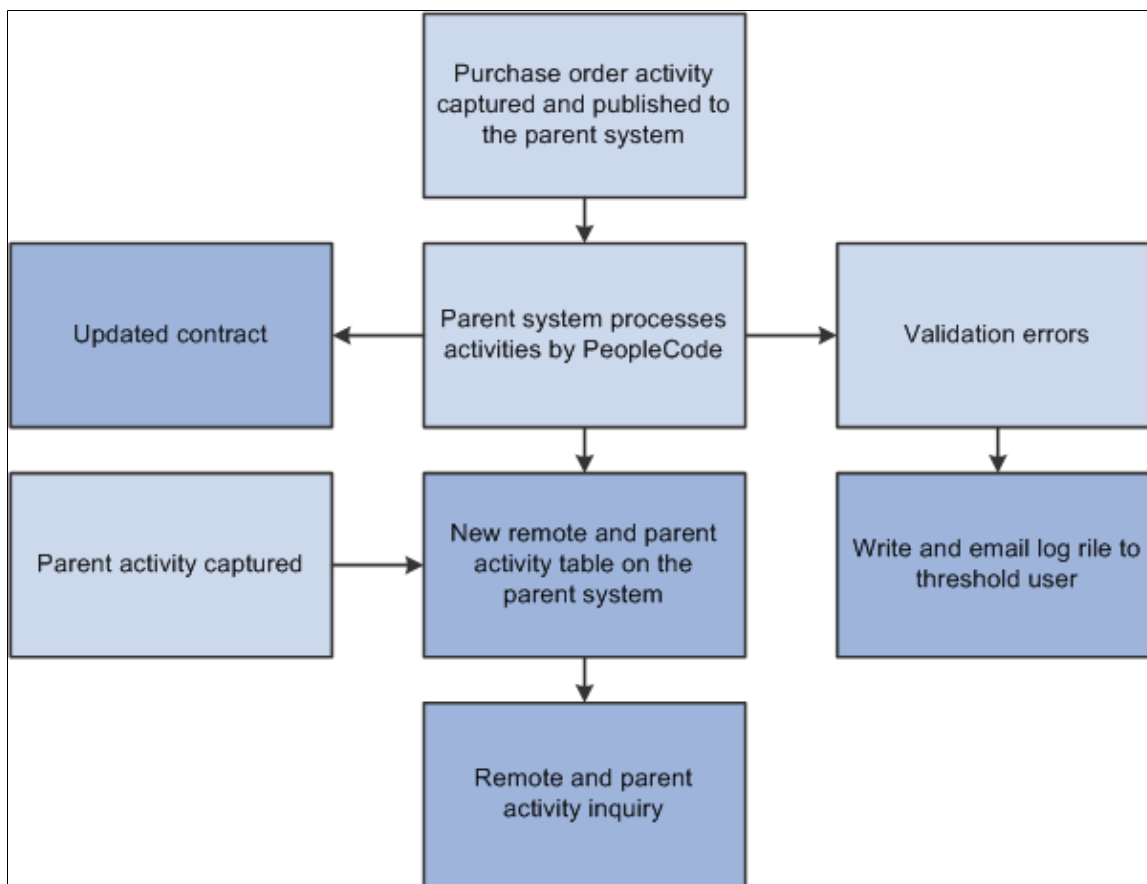
After a contract has been syndicated, any updates to the contract in the remote or parent system are called activities. Activities can take place in your PeopleSoft parent system or outside of the PeopleSoft system

in the remote system, depending on the contract process option. Examples of these activities include updates to purchase orders, receipts, returns to vendor, and vouchers.

Since users in remote systems can create releases against a contract, the Activities feature enables them to send releases and updates to a contract back to the PeopleSoft parent system where they are incorporated into the parent contract. The parent system uses asynchronous messages in PeopleSoft Integration Broker to process incoming messages.

The parent system updates current activities from the remote system with the new captured activities and released amounts and quantities for related contracts. Then, it logs errors for contracts that exceed their maximum rules. The system also provides an inquiry to review activities for each remote system.

This diagram illustrates how activity data flows from remote systems to the parent system:



As the flowchart illustrates, the activity process begins when remote systems publish activities back to the PeopleSoft parent system. The parent system validates and processes the incoming messages and updates the contract. Activities are also captured for updates to the contract on the parent system. The system uses the updates in the parent system and the remote system to produce the inquiry. For Purchase Order process type contracts, there can be multiple remote systems.

To capture contract activities from the remote system, the parent system must enable the service operation to handle the processing of these activities. The incoming messages are processed through an enterprise integration point. The contract activities for each node are deleted before loading the new and updated activities. The system also updates the remote contract ID on the contract header for the remote system, if the contract ID is blank.

To update the release information for each contract, the system uses the activity for the remote node. The parent system:

- Updates the open item amount on the contract header when the activity specifies a contract ID, but not a contract line.
- Updates the line amount and quantity when the activity specifies the contract ID and the contract line; and updates the line amount for the contract category.
- Creates an error log for each contract and contract line that exceeds the maximum amounts and quantities; and creates an error log for each contract category that exceeds the maximum amount.

You use the Review Inbound Exceptions component to review error details.

## Parent Contract Activity Capture Page

Use the Parent Contract Activity Capture page (CS\_CT\_PAR\_ACT\_CAP) to capture parent activities.

Navigation:

**Supplier Contracts > Syndication and Messaging > Capture Parent Activity**

This example illustrates the fields and controls on the Parent Contract Activity Capture page.

Use this page to run the Parent Activity Capture process. You can capture activities for multiple contracts on the parent system. The process captures all activities for contracts specified in the cross-reference record.

<b>Field or Control</b>	<b>Description</b>
<b>Supplier SetID</b>	Select a SetID from which you want to use a supplier. The field value determines the values available for the supplier ID. This is a required field.

<b>Field or Control</b>	<b>Description</b>
<b>Supplier ID</b>	Select the supplier for this contract. This is a required field.
<b>Short Supplier Name</b>	Displays the supplier name. The system populates this field when you select the supplier ID.
<b>Contract SetID</b>	Select a SetID in which the contract you want to use for this activity report resides. The value you select determines the contracts that are available for use.
<b>Contract ID From and Contract ID To</b>	Enter a range of contract IDs for which you want to capture activities.
<b>Process Option</b>	<p>Select a process option value on which to base contract capture activity. Process options determine a specific contract process that the contract uses throughout the contract life cycle. The system captures activities for the contracts that use the process option you select. If you leave the field empty, the system captures activities for contracts that use any of the process options.</p> <p>You can syndicate a contract with any processing option, except Purchase Order, to a single remote system. Using the Purchase Order process option, you can syndicate a contract to multiple remote systems.</p> <p>Field values are:</p> <ul style="list-style-type: none"> <li>• <i>General</i>: Indicates that the contract is for general use.</li> <li>• <i>Order</i>: Establishes pricing terms and conditions that may offset or supplement regular pricing agreements with suppliers. Using this process option, you can syndicate a contract to multiple remote systems.</li> <li>• <i>PO Vchr</i> (purchase order voucher).</li> <li>• <i>PPay Vchr</i> (prepaid voucher): Indicates that the contract is a prepaid voucher contract without an advance purchase order.</li> <li>• <i>PPay w/Adv</i> (prepaid voucher with advance purchase order).</li> <li>• <i>Single PO</i> (single purchase order): Indicates that the contract is a release to single purchase order only contract.</li> <li>• <i>Voucher</i>: This process option establishes and schedules amounts for recurring payments such as rent, lease, and utility payments.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Contract Status</b>	Select a contract status for which you want to capture activities. Values are: <ul style="list-style-type: none"> <li>• <i>Approved</i></li> <li>• <i>Canceled</i></li> <li>• <i>Closed</i></li> <li>• <i>On-Hold</i></li> <li>• <i>Open</i></li> </ul>
<b>From Date and To Date</b>	Enter a date range for which you want to capture contract activity. The system checks the begin dates for contracts and includes those contracts that meet the criteria you enter.

## Publishing Outbound Messages

To publish outbound messages, use the Publish Outbound Message component (IN\_PUB\_MSG).

### Pages Used to Publish Outbound Messages

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Publish Outbound Message Page</u>	IN_RUN_PUB_MSG	Publish messages by initiating the outbound message publish process for outbound PeopleSoft messages that use the batch publish design pattern.
<u>Supplier Contract Syndication Message Selection Criteria Page</u>	CS_RUN_CNT_SN	Define criteria for publishing outbound messages.

## Understanding Outbound Messages

The primary purpose of asynchronous service operations is to process outbound and inbound messages for contract syndication. Due to the size and complexity of the contract data, the service operation for supplier contract syndication when routed inbound is handled by staging the contract data in stage tables. An application engine process validates and updates the contract data. The system generates messages when it syndicates contracts or publishes activities to remote systems.

This table describes the record names and their levels at which they are sent to the remote system:

<b><i>Outbound to Remote System</i></b>	<b><i>Record Name</i></b>
Level zero (contract header)	CNTRCT_HDR
Level one (contract defaults)	CNTRCT_DEFAULTS
Level one (miscellaneous charges)	CNTRCT_HDR_MISC
Level one (contract line) Except the Quantity Line Released and Amount Line Released field.	CNTRCT_LINE
Level one (contract category)	CNTRCT_CATEGORY
Level two (milestone lines )	CNTRCT_MILESTN
Level two (UOM (unit of measure) lines)	CNTRCT_LINE_UOM
Level two (contract schedule lines)	CNTRCT_LN_SHIP
Level two (distribution header)	CNTRCT_BU_DSTRB
Level three (distribution details)	CNTRCT_DSTRB
Level one (contract comments)	CNTRCT_COMMENTS
Level one (pricing)	CNTRCT_ADJ_SET
Level two (pricing)	CNTRCT_ADJ_RULE
Level three (pricing)	CNTRCT_ADJ_DTL

**Note:** For inbound activity messages from remote systems, the system includes all fields on the contract activity record in the message along with the parent system contract ID.

Contract syndication is implemented with one service operation, CS\_PROCUREMENT\_CNTRCT, defined in the CS\_CONTRACT\_SYNDICATION queue. This is an ordered queue since contract updates are serialized. On the parent system, each subscribing node has an outbound routing created for the asynchronous service operation CS\_PROCUREMENT\_CNTRCT.

The system uses two email addresses in the message contract header. They include an address for the contract administrator for the parent system, CS\_PARENT\_EMAIL, and one for the contract local contract administrator for the syndicate system, CS\_LOCAL\_EMAIL. Depending on the capabilities of the remote system, the system uses these email addresses to send notifications in case the contract fails validation. The system uses the email address associated with the buyer for the contract for the parent contact, and uses the email address identified for the syndicate node for the remote contact.

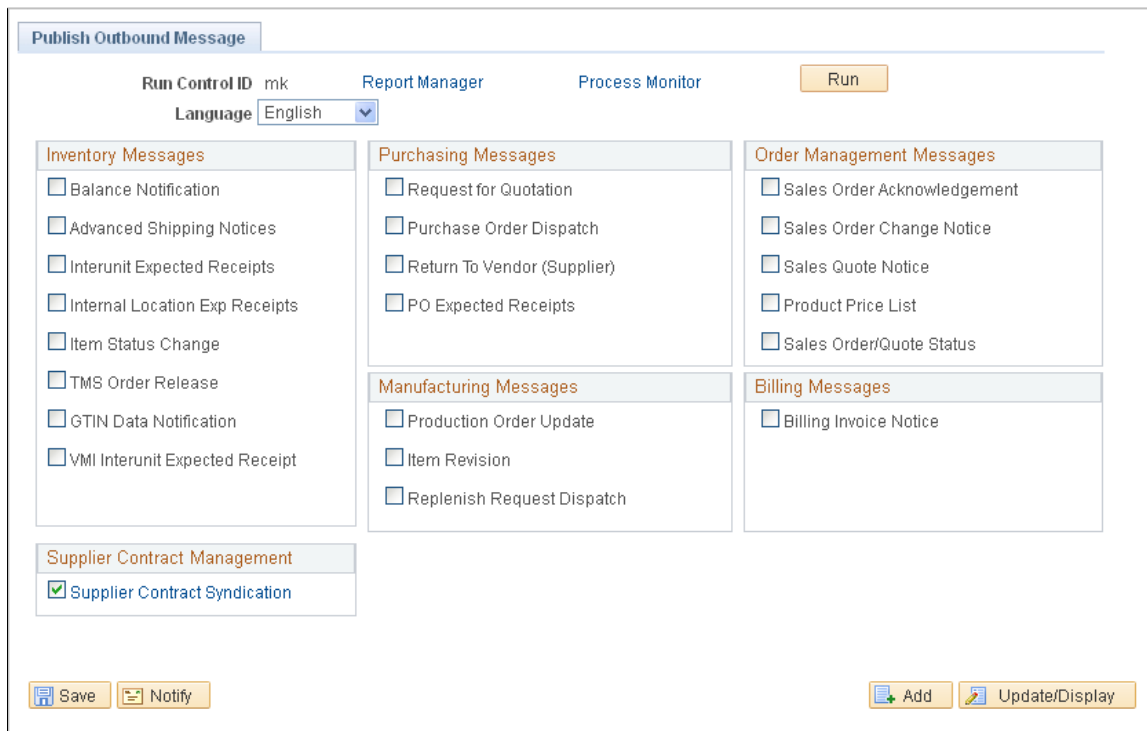
## Publish Outbound Message Page

Use the Publish Outbound Message page (IN\_RUN\_PUB\_MSG) to publish messages by initiating the outbound message publish process for outbound PeopleSoft messages that use the batch publish design pattern.

Navigation:

**Supplier Contracts > Syndication and Messaging > Publish Outbound Message**

This example illustrates the fields and controls on the Publish Outbound Message page.



Use this page to syndicate contracts using the batch system.

During the contract syndication and update processes, the system publishes outbound messages. If the contract has not been syndicated, the system publishes the entire contract and if the contract has been syndicated, the publish options in the contract header determine if the system publishes the entire contract or only the changes. The default publish value is to publish only rows that have changed since the last syndicated date and time for the node.

When you click the **Run** button, you access the Process Scheduler where you can run the IN\_PUB\_MSG process. The system uses selection criteria that you define on the Supplier Contract Syndication Message Selection Criteria page to run the process.

<b>Field or Control</b>	<b>Description</b>
<b>Supplier Contract Syndication</b>	Select to indicate that you want to publish messages from the parent contract management application. When you select this check box, the link becomes active. Click the link to access the Supplier Contract Syndication Message Selection Criteria page where you can either define or update selection criteria for generating the messages.
<b>Remote Contract Activity</b>	Select to indicate that you want to publish messages from the remote or remote contract management application. When you select this check box, the link becomes active. Click the link to access the Supplier Contract Syndication Message Selection Criteria page where you can either define or update selection criteria for generating the messages.  <b>Note:</b> You need to set the remote node setting to Y to access this link. To set the node, launch the Application Designer and open the CS_REMOTE_NODE record object, double-click the <b>PORTAL_REMOTE</b> field, and change the default value from constant <i>N</i> to <i>Y</i> .

## Supplier Contract Syndication Message Selection Criteria Page

Use the Supplier Contract Syndication Message Selection Criteria page (CS\_RUN\_CNT\_SN) to define criteria for publishing outbound messages.

Navigation:

**Supplier Contracts > Syndication and Messaging > Publish Outbound Message.** Select the **Supplier Contract Syndication** check box on the Publish Outbound Message page, then click the **Supplier Contract Syndication** link.

Use this page to select messages to publish, define criteria for outbound messages, and to run the process. The system stages and publishes unique messages for each node defined on the contract. You can use remote systems to manage releases against the contract.

<b>Field or Control</b>	<b>Description</b>
<b>Request ID</b>	Enter a value by which you want to track this publish request.
<b>Description</b>	Enter a unique description for this request.
<b>All Contracts</b>	Select whether you want to publish messages for a single contract or for all contracts. If you select <i>All Contracts</i> , the system includes messages for all contracts that meet the search criteria. If you select <i>Specific Contract</i> , the system highlights the <b>SetID</b> and <b>Contract ID</b> fields for entry. The system also provides a <b>Lookup</b> button for searching contracts.



<i>Field or Control</i>	<i>Description</i>
<b>All Suppliers</b>	Select whether you want to publish messages for a single supplier or for all suppliers. If you select <i>All Suppliers</i> , the system includes messages for all suppliers that meet the search criteria. If you select <i>Specific Suppliers</i> , the system highlights the <b>Suppliers SetID</b> and <b>Suppliers ID</b> fields for entry. The system also provides a <b>Lookup</b> button for searching suppliers.
<b>Publish Changes Only</b>	Select to indicate that you only want to publish updates to the contract or contracts. If you do not select this check box, then the entire contract is published.
<b>Chunk Size</b>	Enter the number of contract lines you want to process at a time.

## Reviewing Contract Activities

### Pages Used to Review Contract Activities

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Activity Summary Inquiry Page</u>	CS_CT_PAR_ACT_INQ	Define activity inquiries.
<u>Activity Summary Detail Page</u>	CS_CT_PACT_INQ_DET	Review activity details.

### Activity Summary Inquiry Page

Use the Activity Summary Inquiry page (CS\_CT\_PAR\_ACT\_INQ) to define activity inquiries.

Navigation:

**Supplier Contracts > Syndication and Messaging > Review Contract Activity**

Use this page to define search criteria for contract activities. Search criteria is based on supplier information you selected to access the page. When you complete the search attributes and click the **Search** button, the system populates the **Activity Summary by Contract** grid with contracts that meet the criteria.

The system creates a copy of the activities report on the PeopleSoft parent system to load parent activity into an activities record with any remote system activities. It then writes a new inquiry to display details of the remote and parent activities. The inquiry provides a summary of all activity against the contract in the parent system. The system summarizes activity by contract line.

For contracts with Purchase Order process options, releases can occur in the parent and multiple remote systems. All other contract types can only create releases in a single remote system. To view the parent activity for purchase order contracts, you also must run the Capture Parent Activity process.

You can search using a variety of criteria, including the source node and from and to dates. These dates define a range in which you want to search for activities.

<b>Field or Control</b>	<b>Description</b>
<b>Contract SetID</b>	Displays the SetID to which the contract belongs.
<b>Contract ID</b>	Displays the contracts that met the search criteria. If you left the <b>Contract ID</b> field blank for the search, then all contracts that meet the remaining criteria appear in this column. Click the link to access the Activity Summary Detail page where you can view activity summary and details for both parent and remote systems.
<b>Contract Status</b>	Displays the status for the corresponding contract.
<b>Maximum Amount</b>	Displays the total amount this contract should not exceed. The total released amount of all lines plus the amount released for open items should not exceed this amount.
<b>Merchandise Amount</b>	Displays the total contract amount for both parent and remote systems.
<b>Currency Code</b>	Displays the currency that applies to the contract.
<b>Last Capture Date/Time</b>	Displays the last time that activities were captured for the corresponding contract.

## Activity Summary Detail Page

Use the Activity Summary Detail page (CS\_CT\_PACT\_INQ\_DET) to review activity details.

Navigation:

**Supplier Contracts > Syndication and Messaging > Review Contract Activity.** Click the **Search** button on the Activity Summary Inquiry page.

This example illustrates the fields and controls on the Activity Summary Detail page.

### Activity Summary Detail

Vendor SetID: SHARE  
 Vendor ID: SCM0000004  
 Vendor Name: ERNIE'S-001  
 Contract Set ID: SHARE  
 Contract Status: Approved  
 Contract ID: 00000000000000000000000000000025

Maximum Amount: Merchandise Amount: 53800.00 USD

Summary Activity by Node			
Click to View Node Details	Syndicate Contract ID	Merchandise Amount	Last Capture Date/Time
PSFT_EP	00000000000000000000000000000025	53800.000	07/14/2009 1:02:40PM

Node Activity Details					
Source Node	Line	Document Type	Merchandise Amount	Item ID	Item Description
PSFT_EP	1	Purchase Order	11000.000	10029	Taxi Child Seat
PSFT_EP	1	Receipt	4400.000	10029	Taxi Child Seat
PSFT_EP	1	Voucher	4400.000	10029	Taxi Child Seat
PSFT_EP	2	Purchase Order	17000.000	10030	Folding Child Trailer
PSFT_EP	2	Receipt	8500.000	10030	Folding Child Trailer
PSFT_EP	2	Voucher	8500.000	10030	Folding Child Trailer

[Return to Summary by Contract](#)

Save
 Return to Search
 Previous in List
 Next in List
 Notify

Use this page to review contract activity summaries and details for parent and remote systems. You capture contract activities for the parent system by running the Capture Parent Activity process. Contract activities in remote systems must be published back to parent system before they appear on this page. You can review summary for each node or select a specific node for which to view all activity details for that node.

### Summary Activity by Node

<i>Field or Control</i>	<i>Description</i>
<b>Click to View Node Details</b>	Click to access activities against this contract and node. Each node represents the parent system or a remote system. The system displays information specific to a single node in the <b>Node Activity Details</b> grid when you click this button. The system disables the button if there is only one node in the summary activity grid, and the activity details grid displays the contract lines activities.

<b>Field or Control</b>	<b>Description</b>
<b>Syndicate Contract ID</b>	Displays the remote system's contract ID against which activities occurred. There can be multiple syndicate contracts for a single parent contract if the contract process option is Purchase Order.
<b>Merchandise Amount</b>	Displays the total value of the contract that has been released by this remote system.
<b>Last Capture Date/Time</b>	Displays the last time that activities were captured for this contract and indicates how current the data is.

## Node Activity Details

Use this grid to review more detailed information about releases against a contract.

<b>Field or Control</b>	<b>Description</b>
<b>Source Node</b>	Displays the node in which activity against the contract has occurred.
<b>Line</b>	Displays the contract line against which the activity occurred.
<b>Document Type</b>	Indicates the document that is summarized for each contract line. Document types include: <i>Purchase Order</i> , <i>Receipt</i> , <i>Return to Vendor</i> , and <i>Voucher</i> .
<b>Merchandise Amount</b>	Displays total amount against this contract line by document type. For example there could have been 30 purchase orders created against line one item that total 300 USD. One row displays with a document type of Purchase Order for line item one, and the merchandise amount is 300 USD. If some of the line item one has been returned to supplier, then another row displays the return with the total amount returned, and the document type is Return to Vendor. Amounts display in the item's currency.
<b>Item ID</b>	Displays the item for which the activity has occurred. A description also displays for the item.

# Reviewing Inbound Contract Messages and Exceptions

## Pages Use to Review Inbound Contract Messages and Exceptions

Page Name	Definition Name	Usage
<a href="#">Review Inbound Contract Exceptions Page</a>	CS_CNTRCT_MAINT	Review inbound contract exceptions.
Syndicated Contract Error Details Page	CS_CNTRCT_MAINT_2	Review syndication errors for inbound contracts by clicking the Error Details link.

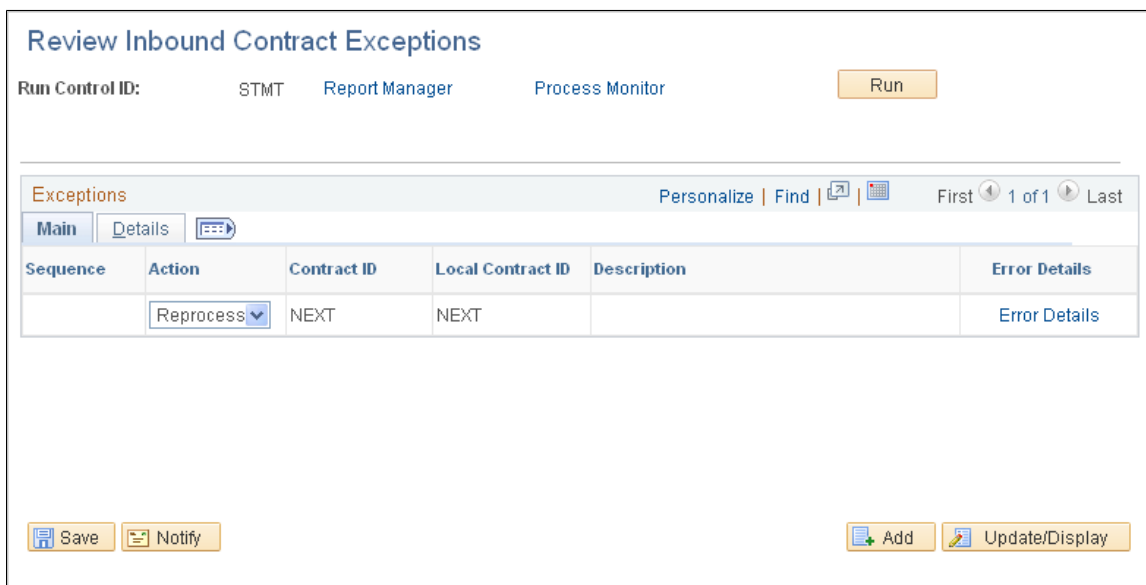
### Review Inbound Contract Exceptions Page

Use the Review Inbound Contract Exceptions page (CS\_CNTRCT\_MAINT) to review inbound contract exceptions.

Navigation:

**Supplier Contracts > Syndication and Messaging > Review Inbound Exceptions**

This example illustrates the fields and controls on the Review Inbound Contract Messages page. You can find definitions for the fields and controls later on this page.



The system uses the Inbound Contract Messaging component to capture exceptions related to the service operation for inbound activities that are coming from remote systems. In addition to syndication, you use the CS\_PROCUREMENT\_CNTRCT message and its service operation to import transactional contracts into the parent system. You use this component to display exceptions related to those inbound contract messages.

Use this page to review, delete, or reprocess any inbound contract message that is in error. If you can fix the error on the current system, correct it, and then select the *Reprocess* option in the **Action** field to reprocess the service operation. Otherwise, you can delete the staged contract and republish it from the parent system.

<b>Field or Control</b>	<b>Description</b>
<b>Sequence</b>	Displays a unique system-assigned local key to the staged contract data.
<b>Action</b>	<p>Select an action to be performed on this line. Values are: <i>None</i>, <i>Reprocess</i>, and <i>Delete</i>. Select <b>Error Details</b> to review the errors.</p> <p>If you can correct the errors, make the correction and then select the <i>Reprocess</i> option in the <b>Action</b> field to reprocess the contract. Otherwise, you can select the <i>Delete</i> option to delete contract and republish the contract from the source system.</p>
<b>Contract ID</b>	Displays the contract ID for the parent system.
<b>Local Contract ID</b>	Displays the contract ID on the current system. If this is a new contract, <i>NEXT</i> appears in the field. If it is an existing contract, the Contract ID for the local system appears.
<b>Error Details</b>	Click to access the Syndicated Contract Error Details page where you can review errors related to this contract exception.

## Details

Select the Details tab.

<b>Field or Control</b>	<b>Description</b>
<b>Message Chunks</b>	Displays the total number of chunks in the message.
<b>Chunks Received</b>	Indicates the total number of message chunks staged. Messages cannot be processed until all chunks are staged. This provides you visibility to incomplete messages.
<b>Supplier ID</b>	Displays the supplier ID from the contract header.
(blank)	Displays the name of the supplier.
<b>Buyer</b>	Displays the buyer ID from the contract header.

## Chapter 12

# Generating Microsoft Word Documents

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## Understanding Microsoft Word Document Generation

PeopleSoft Supplier Contract Management generates Microsoft Word documents in an open .xml file format when you preview a clause, section, or document configurator or when you generate the first-draft document using the document authoring system.

These topics focus on generating draft documents and re-creating and refreshing capabilities of document generation: [Generating Microsoft Word Documents](#), [Refreshing Microsoft Word Documents](#), and [Viewing Document Generation Logs](#)

Microsoft Word document generation is the process the system uses to assemble elements from the document library into Microsoft Word documents. The process of creating a document is the beginning phase for enabling integration between PeopleSoft pages and Microsoft Word documents.

PeopleSoft Supplier Contract Management uses the Microsoft Word generation program when creating initial draft versions of an authored document and initial draft versions of amendment documents when you are creating separate amendment files. You create the initial Microsoft Word document using the Document Management component.

To create an initial document, use the Add a Document page to select a value for the **Source Transaction** field, assign a contract ID, purchase order ID, or ad hoc ID, and click the **Add a Document** button. Use the next page to define the document configurator that structures the document, and then click the **Create Document** button, which starts the generation process. You can also use a selection wizard to determine the configurator.

If you use a configurator selection wizard, the document creation process uses the responses to select the appropriate configurator. Then, if a document creation wizard is associated with the configurator, the system captures the responses, then invokes a process to create an instance of the initial draft of the Microsoft Word document. During the generation, the system processes all elements from the library that are directly or indirectly linked to the document configurator to expand and create the initial draft contract document in a Microsoft Word XML Document format. After you create the initial draft, you can view, modify, and perform document life-cycle actions against the document.

Depending on how the document configurator has been defined, the system includes any required content such as sections and clauses, resolves related bind values, evaluates rules that are linked to the configurator, and takes appropriate action depending on the result of the rule. For example, a rule might require that an additional clause be added to the content.

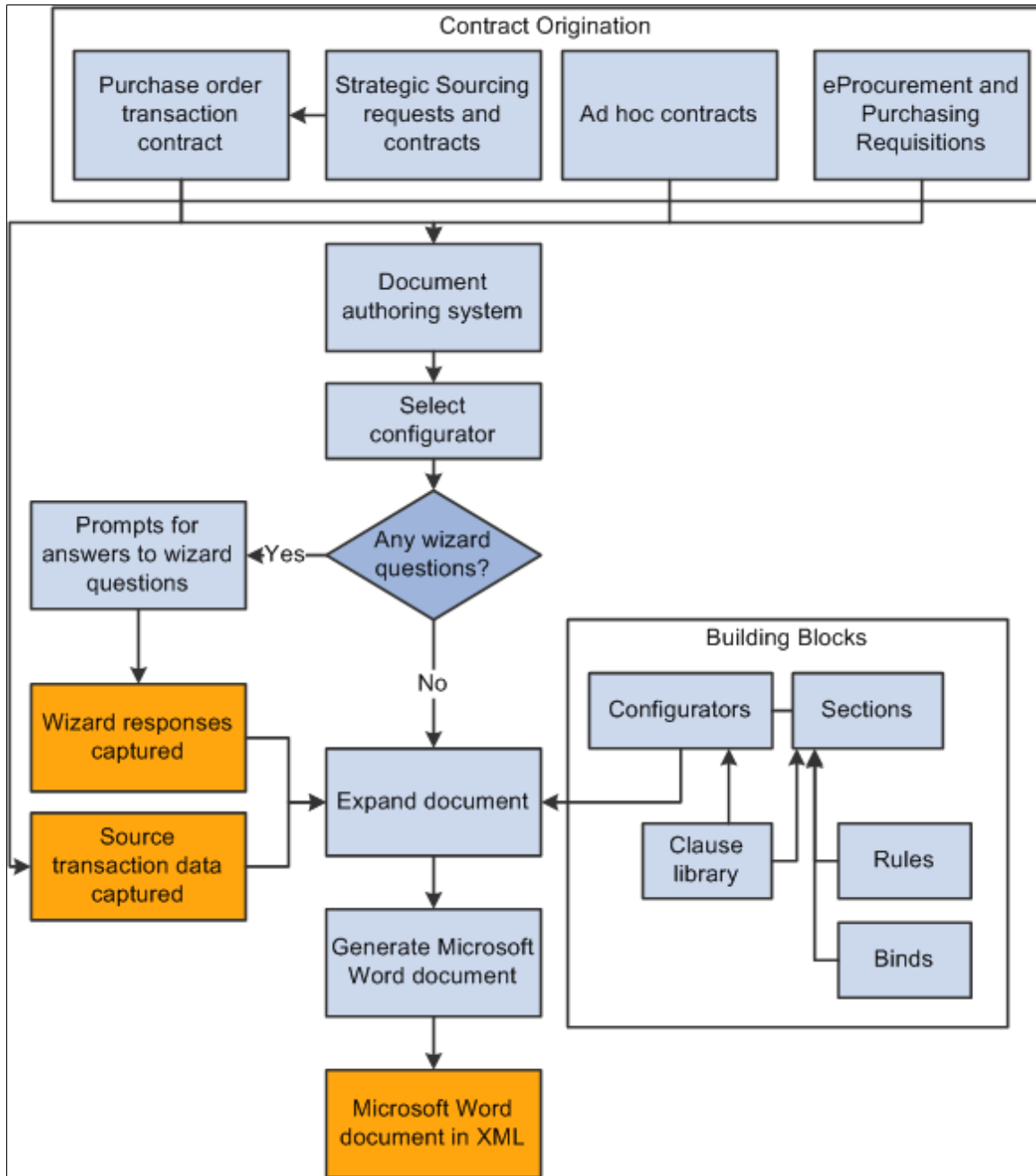
If you are using document types, the generation process depends on the document type and its attributes, such as the kind of wizard it uses to generate a document. Also, you can import or copy documents, but some document creation processes do not apply to these documents.

After the system generates the document, it stores the document as a draft version on a file transfer protocol (FTP) server outside of the database or within the database, depending on the file attachment settings. The system also stores detailed information about the document on the Document Management

page so that you can manage it from the PeopleSoft document authoring system. These details include the document identifier, its name, location, and version used in the document.

**Note:** For the best results in auditing the details and testing the generation process for document creation wizards and configurators, select the *Details* option in the **Log at Document Generation** field on the Document Configurator Definition page or when defining default values using the Installation Options - Supplier Contract Management Page. The *Details* value enables you to log and review details for warnings, bind variable resolutions, configurator expansion processing, and wizard details for both document creation and configurator selection wizards.

This diagram illustrates how the system generates Microsoft Word documents at a high level:



The next sections provide a more detailed explanation of Microsoft Word document generation.



## Related Links

[Understanding Microsoft Word Integration with Supplier Contract Management](#)

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# Processing Terms Used When Generating Microsoft Word Documents

This topic describes processing features the system uses during document generation.

<i>Term</i>	<i>Definition</i>
Document structure	A document structure is the entire document structure that includes any children for which the parent element is either repeating, an alternate, or an element that is included due to a rule. The structure represents the descendent hierarchy of text elements and depends on the repeating nature of the parent element. other repeating elements, rules, or alternates are possible as descendents of the parent element, but they are not considered document structures.
Microsoft Word XML (Microsoft Word Extensible Markup Language) Microsoft Word XML (Microsoft Office Open Extensible Markup Language) Microsoft Office Open Extensible Markup Language	<p>Microsoft Office 2007, or later version, enables the PeopleSoft Supplier Contract Management system to generate the Microsoft Word document content and complete the check-out and check-in processes without losing Microsoft Word formatting.</p> <p>The system creates and saves the file in a Microsoft Word XML Document format (.xml extension instead of a .doc extension).</p>
Nonrepeating elements	Nonrepeating elements are clauses, sections, or rules that are based on transaction information. However, nonrepeating elements are not based on repeating transaction information; rather, they are based on transaction information for which only a single value will ever exist for the contract. For example, a supplier name or a contract end date is a single value. Nonrepeating elements can also be based on document creation wizard binds because they have only one value for the contract.
Repeating elements	A repeating element is a clause, section, or rule that is based on transaction information. You map to this information using bind variables that may have multiple values for a contract. Examples of repeating elements might be contract items on a purchase order contract or contact information on an ad hoc contract. The repeating nature of the bind variable used in the element determines whether the element itself is to repeat or not.

<b>Term</b>	<b>Definition</b>
Source transaction	<p>Indicates whether the document was created for use with a purchasing contract, purchase order, or for ad hoc use. An <i>Ad Hoc</i> document is one that has been created for general use. These documents are not constrained by procurement requirements and can be used for a variety of organizational uses, such as purchasing a one-time miscellaneous item or a service outside of the procurement system.</p> <p>A <i>Purchasing Contract</i> document is tied to a specific contract ID and extracts specific information from the contract to include in the document. The document contains a link back to its source transaction so that you can identify the source from within the document authoring system.</p> <p>A <i>Purchase Order</i> document is a document that is based on a purchase order and is linked to a PeopleSoft Purchasing purchase order.</p>

## Related Links

[Source Transactions for Authoring Purposes](#)

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# Generating Microsoft Word Documents

This topic describes the steps that you use and the system actions for generating documents. The steps also apply to amendment document generation. Generally, this information applies to both creating documents and creating separate amendment files for which you specify an amendment configurator ID.

To generate a Microsoft Word document:

1. You invoke the document generation process.

To begin the generation process, you can create the Microsoft Word document through the Document Management page. For purchasing contracts, the transaction contract must already exist. Using document types, a number of methods exist that lead up to the generation of a document. For example, you might use a configurator selection wizard to select the configurator. Or, the document type might specify to allow automatic document creation where the system launches the generation process with minimal user involvement.

See [Understanding Document Types](#).

Use the following links for more information about invoking the document generation process for ad hoc, purchase order, and purchasing contract documents.

See [Creating Authored Documents](#).

See [Creating Authored Documents for Purchasing Contracts](#).

2. You specify document attributes to incorporate into the Microsoft Word document.

As you define a document, you can define additional attributes that are related to the authored document. You can optionally define a document administrator and a sponsor and sponsor's department for the document, along with begin and expiration dates for ad hoc documents, and a document description. You can also define any external contact information for the document at this point.

Attributes can serve as additional information for the document which, in turn, the system can use to evaluate and include in the generation process when using bind variables. For example, you can specify a sponsor for the contract and reference the sponsor in the contract by using a transactional bind that represents the sponsor. After the system generates the document, you can update several of the attributes.

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**Note:** The system has several predefined bind variables. Many of the binds that are related to document attributes have a *DOC\_* prefix. You set up bind definitions and then map them to source transactions.

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See [Understanding Bind Variables](#).

3. You specify a configurator ID, and click the **Create Document** button.

The system evaluates the document configurator ID and invokes the document creation process. Then, if a document creation wizard is specified in the configurator definition, the system initiates the wizard and presents the questions to document authors.

The document creation wizard is a tool that enables you to prompt and store values that are related to groups of questions that you define specifically for each document configurator. These questions can result in wizard bind values that the system can use during the document generation process to place values in the contract, or as values referenced in rules to determine contract content. The configurator selection wizard, on the other hand, is a group of questions the system uses to select the configurator. After selecting a configurator using the configurator selection wizard, then the system might use a document creation wizard to create the document.

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**Note:** If you use the Copy Document feature to create a document, the system does not use a document configurator. Rather, the system makes a copy of the existing document. Also, if you use the Import Document feature, you can create a document within the document authoring system from an external document. After importing the document, you can perform a limited number of life-cycle tasks for it, and the system marks it as an imported document.

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See [Understanding How to Copy Documents](#).

See [Importing Documents](#).

4. The system uses the document configurator to expand the content of the document.

During the expansion process, the system finds all elements that are linked to the document configurator and expands the content into a draft version of the Microsoft Word document. The system evaluates document creation wizard bind values, rules, alternate rules, and repeating elements to expand the document.

In addition to wizard bind values, the system can reference additional transactional bind values from purchasing contract or ad hoc source transaction that is defined in the setup. The expansion process applies to both the initial document and the separate amendment files.

During the expansion process, the system:

- a. Expands the content within the document configurator.

Using the begin date of the purchasing contract or the ad hoc document to select active and approved content, the system incorporates all directly referenced sections and clauses, section child structures, and clause dependents that are included on the configurator. The expansion includes the children of those elements, such as dependent clauses or clauses that are attached to sections and children of those elements.

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**Note:** The system automatically excludes content from the document that is not approved, is inactive, or is approved, but future-dated beyond the contract begin date.

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See the [Document Configurator Definition Page](#).

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**Note:** If the contract begin date changes after the system generates the document and then you re-create the document, the system uses the new contract begin date to expand the content during the re-creation process. Changing the begin date alone does not affect the document.

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- b. Applies rules that are attached directly to the configurator or to a section element.

During document generation, the system evaluates each rule that has been attached directly to the configurator or section element for a simple true or false result. If the rule is true, the system attaches all elements and their children to that rule and includes them in the Microsoft Word document.

If the rule is false, the system does not include the related elements, but saves the rule with the document in case a future refresh of the document causes the system to invoke the rule again.

You nest rules in the configurator. For example, you can attach a rule to a section that itself was included by a rule on the configurator. The system evaluates rules for each instance of repeating data that it includes as children of a repeating structure. For example, suppose that the repeating information is a section that includes procurement contract items. The system can attach a rule to include additional contract clauses that are specific to the item category of that particular item. When generating the document, the system reevaluates the rule for each contract item to determine whether the additional clauses should be included for that particular item.

- c. Resolves binds.

During document expansion, the system determines which binds to resolve for use in document clauses, sections, or rules. The system resolves transactional binds using source transaction definitions and bind mappings to map the binds to transactional sources, such as the transactional purchasing contract. All document creation wizard binds and many transactional binds are typically nonrepeating, level zero binds, for which only one occurrence of the bind value is available during document generation. A contract number is an example of a nonrepeating bind.

For binds that repeat, such as contract items on transactional purchasing contracts, the system resolves the binds based on how many occurrences exist in the contract transaction. An example of a repeating bind might be the items that exist on the purchasing contract. The system logs resolved bind values as part of the generation process.

- d. Expands repeating sections or clauses that may exist.

If the document configurator contains repeating sections or clauses, the system expands these during the generation process. For example, suppose a configurator contains a nonrepeating section defined as S\_PRODUCTS01 (products and services) and within that section a repeating child section S\_CONTRACT\_LINES (contract lines) exists with a title or body that references bind variables for items in the transactional purchasing contract. During document generation, the system repeats the child section S\_CONTRACT\_LINES in the document for each instance of the item information that is contained on the transactional contract. The system evaluates each instance based on the bind mappings for bind variables that are defined within the section S\_CONTRACT\_LINES.

A section, such as S\_PRODUCTS\_01, might also contain additional clauses or sections within it, depending on how you define the section. The system expands the section according to its contents. Furthermore, if the system finds nested repeating structures, it expands them in each child section. For example, if the S\_CONTRACT\_LINES child section contains a repeating child with line-level milestone information, the system repeats the appropriate line-level milestone information directly beneath the corresponding contract line.

See [Understanding Bind Variables](#).

See [Bind Variables and Repeating Clauses](#).

- e. Builds table clauses when they exist.

Table clauses enable you to create a table using Microsoft Word and to insert repeating binds within the table columns as you need. During document generation, the system expands the rows within the table clause based on repeating bind data that exists within the transaction system.

- f. Applies rules that are attached to alternate clauses.

The system uses rules that are attached to alternate clauses to determine which alternate clauses to use in the Microsoft Word document. Each alternate clause can have a rule attached to it. The system checks the alternates in sequenced priority order to find the first alternate for which the rule is true starting with the highest priority.

During document generation, the system substitutes an alternate clause and its dependent clauses for the primary clause and its dependents in the document when one of the alternate clause rules renders true. Thus, when using multiple alternate clauses, you should typically list the most restrictive rules first followed by the least restrictive.

For example, suppose that the contract specifies that a clause be substituted if the supplier is located in a specific state, and substituted with a different, more restrictive clause, if the supplier is located within a specific county of that state. The highest priority rule and alternate clause should evaluate the combination of the county and state first, followed by the second rule that evaluates just the state so that the system evaluates alternate clauses in the correct sequence.

If the system doesn't find any alternate rule that is true, it does not substitute an alternate. The system evaluates alternates during contract generation once for a clause. For example, if an alternate clause is selected during contract generation, and it, in turn, has alternate rules and clauses defined (alternates for the alternate), the system does not evaluate the rules or alternates for the alternate clause.

Alternates can exist for nested elements within the configurator. The system evaluates those nested alternate clauses. For example, if an alternate clause has dependent clauses which, in turn, have alternates, the system evaluates the alternate clauses as the document is expanded.

5. The system creates a Microsoft Word XML Document.

After the system creates the draft Microsoft Word document, it stores it on the FTP server and links it back to the Document Management page as version 0.0.

The filename the system uses to generate the document uses this format: `<SetID>_<contract/ah-hoc ID>_<version number>`. So, for example, the first time you check out a newly generated document for procurement contract 000000000000000000000023, the file name might be `SHARE_00000000000000000000000023_0.00`. You can change this default filename by renaming the file on the local system during check out.

The system does not change the name of the document during check in, check out, or refresh because it displays document names during dispatch and can be referenced within the document itself as Microsoft Word headers or footers.

---

**Note:** You specify the location for the file transfer protocol using the Administer File Attachments page. To access the page, select **Set Up Financials/Supply Chain > Common Definitions > File Attachments**.

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See [Setting Up Servers and Directories](#).

To create an XML-based document during document generation, the system:

- a. Creates a memory resident XML structure to contain the new document.
- b. Expands and resolves the .xml versions of sections and clauses.

The system checks for section and clauses on the document configurator and assembles these elements in the memory-resident XML structure. It applies Microsoft Word paragraph styles and content from the Microsoft Word template that are associated with the document configurator.

- c. Stores and moves the XML-based document to the FTP server and folder that is defined in the File Attachments component.

This action takes place after the system fully expands the XML document.

- d. Associates the XML file with the Document Management page by version number.

The system displays the current version on the Document Management page. You can access previous versions of documents that have been generated using the **Document Version History** link on the Document Management page. The system displays the Document Management page upon completion of the generation process along with any logging messages.

6. The system generates a log.

The system generates a log for the initial document generation and displays a message if any serious logging warnings occur such as bind values that it could not resolve in the document. After you initially generate the document, the system does not use the document configurator for document

editing, unless you select to re-create the document. Changes that you make to the document at this point are to the draft document, either through application pages or Microsoft Word. For each generation the system performs against the document, it provides a logging history. You access the history using the **Document Version History** link on the Document Management page.

7. You select to re-create the document.

After the system generates the document, you can click the **Recreate Document** button to re-create the document. This action indicates that you want to create the document again. The system completely erases the original document and generates a new document using the same processing as it did for the original document generation. Document re-creation does not include any edits that you have made to the existing current document. If you re-create the document and use a new version number, you can use the **Document Version History** link to view prior versions of the originally generated document.

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**Warning!** When you re-create a document, the system creates a new document using the latest transactions and document elements that are in effect as of the begin date of the source transaction. This is either the purchasing contract begin date or ad hoc begin date. You lose all changes to the original document.

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**Note:** The Re-create feature can also apply to amendments when you are maintaining separate amendment files for the contract. You can also re-create documents for imported documents and their amendments. Depending on the process options you use to import the legacy document, the Recreate Document button may or may not appear.

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**Note:** Features of the generation process are also used for creating executive summary documents. You can create and refresh a single executive summary document for a main contract document based on setup within the document type.

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See [Understanding Amendments for Imported Documents](#).

See [Importing Documents](#).

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## Refreshing Microsoft Word Documents

This topic describes how the system refreshes bind variables and related content in a document. You refresh documents after you make changes to a contract transaction or document creation wizard binds. To refresh documents:

- You select to refresh an existing document.

You use the **Refresh Document** button on the Document Management page to initiate the refresh. The system invokes the document creation wizard to enable refresh of wizard binds and uses the previous values as default values.

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**Note:** The system uses the wizard that is defined for the configurator and that was used to generate the document the last time. So if you change the document creation wizard on the contract after initial generation, and the new wizard does not access all the binds that are used by the old wizard, then you may not be able to modify a wizard bind that is used by the contract.

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- The system evaluates the bind values in the document and compares them to current values in the transaction or document creation wizard.

If the system finds any differences, it replaces the old values in the document with their new values. In this case, the system does not alter other text elements that originate from the document generation or from manual changes to the document. However, exceptions occur.

If the system detects any value changes within a document structure, described in the [Processing Terms Used When Generating Microsoft Word Documents](#) topic, then it completely rebuilds the related content in the document using the current definition of the elements it includes. In this situation, you might refresh the document and lose manual changes that were made to the document.

For example, assume that you generated a document that includes a repeating document structure that lists transactional contract line items. Later, you make manual changes to the document text that is related to those line items, and then add a new item to the transactional contract. Refreshing the document replaces the entire repeating document structure of the document. This is the parent repeating element and all its descendents. The new transactional line now appears, but the system removes the manual changes

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**Note:** The system does not use the document configurator to rebuild document structures. Instead, it rebuilds the document starting with the parent element for the document structure and its descendent elements.

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When rebuilding document structures in the document, the system uses the current effective-date definition for the content based on the begin date of the source transaction. So if an element in the hierarchy changes, the system might include element changes when it rebuilds the structure.

Before you use the **Refresh Document** button on the Document Management page, remember that the Refresh process starts with the bind values that are already on the document and compares those to the current values on the transaction or document creation wizard to determine where it needs to update the document. If a rule is true, then the document binds include those that are used on the rule, and those used on any elements included by the rule. If a rule is false, the system saves the rule in the document, hidden from view. In this case, the document binds include only those that are used on the rule, but not those that are used on objects that are attached to the false rule.

You should consider these points about how the system processes content when it refreshes a document:

- Refresh of a rule document structure when a bind changes within the rule structure:
  - Whether the rule was originally true or false, when the system detects a bind value in the rule document structure, it reevaluates the rule.
  - If the rule was true and is still true, during the refresh, the system replaces the content that is related to the rule. The system adds the new content from the library as specified by the rule using the source transaction begin date. This situation occurs even if the rule binds did not change, but binds within the rule structure did change.
  - If the rule was true and is now false, the system removes the content that is related to the rule from the document. However, the system keeps the rule as part of the document, but hidden from view, for consideration with future document refreshes.
  - If the rule was false and is now true, the system inserts the content that is related to the rule into the document at the location where it originally placed the rule.



- If the rule was false, and is still false, and even if binds have changed on descendent elements, the system does not change the document.

- Refresh of repeating document structure when a bind changes within the repeating structure.

The system rebuilds the entire document structure using the current version of the parent element and all descendents. Any manual changes that you make are lost.

- Refresh of alternate document structure when a bind changes within the alternate structure.

The system checks alternate clauses with attached rules in their priority sequence order similar to the Generate process. Because of the change in bind values, the system can select an alternate clause that is different from the original clause used in the document. If a different clause is used, then the system includes corresponding descendents of that clause instead of the descendents on the original clause. The system bases alternate rules and clauses that it uses on the current version. Any manual changes that were made within the alternate document structure are lost.

- Refresh of elements not residing within a document structure.

The system does not modify any content. It replaces only old bind values with the new bind value and retains any manual changes.

- Manual insertion of nonrepeating clauses in Microsoft Word:

- If you manually include a nonrepeating clause in the Microsoft Word document using the Research task pane in Microsoft Word, and the clause contains a nonrepeating bind variable, the system resolves the variable after you check in the document and click the **Refresh Document** button.
- If you insert a repeating bind variable in a Microsoft Word document, the system cannot automatically resolve the bind. It expands and resolves the repeating binds during the initial generation of the document.

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**Note:** The Refresh feature can also apply to amendments when you are maintaining separate amendment files for the contract.

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## Viewing Document Generation Logs

### Page Used to View Document Generation Logs

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Generation Log Page</a>	CS_DOC_WGEN_LOG	View generation logs.

## Understanding Log Generation

During document generation, the system generates a log that you use to review the processing results that indicate how the system interpreted and built the document from the configurator. You can also use the log to resolve unexpected results. After it completes the generation process, the system displays a message that it has logged document generation issues.

The generation log provides you a view of how the system processed the document. The log is essential when you are building documents from complex configurators that contain document creation wizards, binds, rules, alternates, and repeating sections.

The generation log is the primary validation tool for use with document creation wizards and configurators. For example, you can define a wizard that enables document authors to branch through multiple paths that result in a variety of bind responses, rules, and related content. You can validate the wizard combined with the configurator when you generate test documents that exercise the various paths. The log validates that the proper content and bind variable resolution is taking place for each document creation wizard path that you define.

Two options are available for logging warnings and generation details. Logging options determine the content of the log. You can define the default value setting by using PeopleSoft Supplier Contract Management installation options. You can override the default value using the **Log at Document Generation** field on the Document Configurator Definition page.

Generation logging options are:

- Details

This option logs more extensive information for document generation, including grids that contain:

- General warnings.
- Bind variables that are used in the document and their resolved values.
- Configuration expansion that shows how elements were included in the document.
- Rules that were evaluated.
- Extended document creation wizard log showing navigation choices and responses to wizard questions.
- Configurator selection wizard information.

- Log Warnings and Wizard

This option includes warnings and document creation wizard summary information only. You should use this for configurators that are in production, especially complex configurators that require more complex processing. This logging option provides better overall performance for complex processing.

See [Setting Up Document Configurators](#).

## Logging Errors and Messages

This table describes detail messages and warnings that are associated with document generation logging:

<b>Messages</b>	<b>Cause and Resolution</b>
Document contains no content. Content is possibly Empty, Inactive, Not Approved, or Future Dated.	This can indicate a problem with the configurator, elements in the library, or the begin date on the contract.
Wizard not specified on configurator but the document contains wizard variables.	The system will not resolve the variables in the document.
Bind variable value changed.	The value for the bind variable has changed since the document was created, refreshed, or re-created.
Refresh document, variable could not be resolved.	The system will not resolve the variables in the document.
Alternate not resolved.	An error occurred when the system created the alternate clause. You can proceed with the document, but you should review the alternates for the specified clause.
Rule could not be resolved.	An error occurred when the system resolved a rule. You can proceed with the document, but you should review the specified rule.
Rule resolved true.	During document generation, the system found the rule to be true and the applied the rule definition and criteria accordingly. Clauses attached to the rule will appear in the document.
Rule resolved false.	During document generation, the system found the rule to be false and will not include clauses that are attached to the rule in the document.
Variable not resolved.	<p>The system found a bind variable (wizard or transactional) in the generated document, but could not resolve the variable.</p> <p>This might happen if a wizard bind exists in a clause or section, but was not answered as part of the wizard.</p>
Effective-dated content inactive.	The specified element is effective-dated, but no active effective row exists. The content might have prior-dated or future-dated entries; however, the closest date prior to the current date is inactive.
Effective-dated content not approved.	The specified element is effective-dated, but the content has not been approved. The content might have prior-dated or future-dated entries; however, the closest date prior to the current date is active and unapproved.

<b>Messages</b>	<b>Cause and Resolution</b>
Effective-dated content does not exist.	The specified element is effective-dated, but the date was not found. The content has effective-dated entries for only future dates.
Version in the document is not the most current.	The contract library has a more current version of this clause or section than the one used in the document you are copying. If you want to include the object, you can locate the most current version and place it in the document.
Version in the new document is more current.	The version of this object in the new document is more current than the version in the document from which the document was copied. Normally, this is because a rule or repeating section has been rebuilt. When a section is rebuilt, all manual changes to that section are lost.
Objects exists in new document but not the copy from document.	Normally, this is because a rule or repeating section has been rebuilt. When a section is rebuilt, all manual changes to that section are lost. Refer to the Configurator Expansion grid for more information.
Objects exists in copy from document but not in the new document.	Normally, this is because a rule or repeating section has been rebuilt. When a section is rebuilt, all manual changes to that section are lost. Refer to the Configurator Expansion grid for more information.

This table shows messages that appear in the Configurator Expansion grid action messages:

<b>Messages</b>	<b>Cause and Resolution</b>
Alternate considered.	<p><i>Alternate Used:</i> The system evaluated the alternate clause that was listed in the <b>Content ID</b> column and used it instead of the primary clause.</p> <p><i>Alternate Not Used:</i> The system evaluated the alternate clause that was listed in the <b>Content ID</b> column and did not use it to replace the primary clause. For example, the alternate rule did not resolve to true.</p>

<b>Messages</b>	<b>Cause and Resolution</b>
<p>Include.</p>	<p><i>Inserted by Clause:</i> The content ID was included in the document because it was listed as a dependent to the clause object that was listed in the <b>Source Content ID</b> column.</p> <p><i>Inserted by Section:</i> The content ID was included in the document because it was listed as a child to the section object that was identified in the <b>Source Content ID</b> column.</p> <p><i>Inserted by Rule:</i> The content ID was included in the document because it was tied to a rule that was identified in the <b>Source Content ID</b> column that was evaluated to true.</p> <p>Blank: If the message column is blank, the content ID was included in the document because it was listed directly on the document configurator.</p>
<p>Include repeating.</p>	<p><i>Inserted by Clause:</i> The repeating content ID was included in the document because it was listed as a dependent to the clause object that was listed in the <b>Source Content ID</b> column.</p> <p><i>Inserted by Section:</i> The repeating content ID was included in the document because it was listed as a child to the section object that was identified in the <b>Source Content ID</b> column.</p> <p><i>Inserted by Rule:</i> The repeating content ID was included in the document because it was tied to a rule that was identified in the <b>Source Content ID</b> column that was evaluated to true.</p> <p>Blank: If the message column is blank, then the repeating content ID was included in the document because it was listed directly on the document configurator.</p>

## Generation Log Page

Use the Generation Log page (CS\_DOC\_WGEN\_LOG) to view generation logs.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Generation Log** link on the Document Management page.

This example illustrates the fields and controls on the Generation Log page. You can find definitions for the fields and controls later on this page.

**Generation Log**

SetID: SHARE Contract ID: 000000000000000000000000045  
 Vendor: CAMPER'S WAREHOUSE

No Warnings Logged

Wizard Log

Configurator Selector Wizard Customize | Find | View All | First 1 of 1

Question Group	Display Sequence	Question	Answer	Group Sequence	Navigate	Jump to Group Sequence	Configurator ID
PURCHASING_SELECTOR	1	Select the type of purchasing contract.	Goods	10	Specific Configurator		PURCHASES_STD

Logging only Warnings and Wizard

The logging option that is specified on the Document Configurator Definition page determines the grids that appear for the Generation Log page.

Use this page to view document processing information. This information indicates system processing conditions and any warnings that were produced during the document's generation.

Logging occurs during processing for rules, alternate clauses, and resolution of binds. The system provides messages on this page that indicate what it is logging. The messages are:

<b>Field or Control</b>	<b>Description</b>
<b>No Warnings Logged</b>	This message indicates that no warnings were logged during the generation of the document.
<b>Logging Warnings and Wizard Only</b>	This message indicates that the system is logging only warnings for transactions and document creation wizards based on the logging setting that is defined on the document configurator. When the configurator is set to only log warnings, the <b>Bind Variables</b> and <b>Configurator Expansion</b> grids are not available.

### Generation Warnings

This grid describes warnings that the system generates when it processes a document.

<b>Field or Control</b>	<b>Description</b>
<b>Message</b>	Displays the subject of the warning.  See <a href="#">Understanding Log Generation</a> .
<b>Content Type</b>	Displays the type of document content from which the system generated the warning. Examples of content types are rules, clauses, and sections.
<b>Content ID</b>	Displays the content's object name. This is the name that was assigned to the content during its creation.
<b>Source Content Type</b>	Displays the parent content type (section, rule, clause) for the source content ID.
<b>Source Content ID</b>	Displays the parent content object ID in which the specified content ID is a child or is dependent.
<b>Bind Type</b>	Displays the type of bind for which the system logged the message. Values are <i>Transactional</i> , which retrieves data values from source transactions, and <i>Wizard</i> .
<b>Bind Variable</b>	Displays the system identifier for the bind variable for which the system generated the warning. When the system generates a document, it replaces bind variables with either transactional values or values that are supplied by the document creation wizard.
<b>File Type</b>	Displays whether the log is for an actual document or for an attachment file. When you re-create documents, you can re-create only the document, only the attachment, or both. The process logs both types. <i>Main</i> indicates that the log is for the core document and <i>Attachment</i> indicates that the log is for an attachment file.

## Wizard Log

Use this grid to view logging entries for document creation wizard that the system processed. The system always logs wizard details, regardless of the value in the **Log at Document Generation** field on the Document Configurator Definition page. When the value is *Details*, all the wizard questions appear in the log. When the value is set to *Log Warnings and Wizard*, only the questions that the document author saw when running the wizard appear in the log.

<b>Field or Control</b>	<b>Description</b>
<b>Question Group</b>	Displays the question group for the document creation wizard to which the listed question belongs.
<b>Display Sequence</b>	Displays the display order in which the question appears to the author.
<b>Question</b>	Displays the question as it appeared to the author.
<b>Answer</b>	Displays the answer that the author provided for the question.
<b>Bind Variable</b>	Displays the bind variable that is associated with the question.
<b>Group Sequence</b>	Displays the group sequence number that was specified on the question group definition for the question. If any of the questions were navigational questions and jumped to a specific sequence number, this is the sequence number that is referenced in that setup.
<b>Navigate</b>	<p>Describes the system navigation after a question was answered by the author. When the field is blank, it indicates that navigation was not defined for that question. Other values are:</p> <p><i>Next Group</i>: Indicates that the system went to the next question group after the question was answered by the author.</p> <p><i>Next Question</i>: Indicates that the system went to the next question in the question sequence after the question was answered by the author.</p> <p><i>Specific Sequence Number</i>: Indicates that the system went to a specific question in the question group after the question was answered. This might happen based on the response to a question when the next question in the set is not required.</p>
<b>Jump to Group Sequence</b>	Displays the sequence number that the system accessed after this question was answered. It is based on the navigation option of <i>Specific Sequence Number</i> .

See [Setting Up Question Groups for a Wizard](#).

## Document Copy: Basic Info Tab

Use this grid to review information about documents that have been created using the Copy Document feature. The grid displays messages about the document contents. This includes messages, content type, ID, and description, and an explanation of the message. Select the Details tab to review the explanation.



See the [Copy Document Page](#) and the [Copy Document Page](#) for Purchasing contracts.

## Configurator Selection Wizard

Use this grid to review the generation process when the system generates a document using a configurator selection wizard. This grid is similar to the Wizard Log grid, except it provides additional navigation information and the configurator ID used by the configurator selection wizard to create the document.

The values in the **Navigate** field define whether the configurator was defined for the wizard or if the configurator was selected based on the answers to wizard questions. The value in the **Configurator ID** field is either the predefined configurator or the configurator the system selected based on answers to configurator selection wizard questions. See [Configurator Selection Wizards](#).

## Bind Variables: Log Tab

Use the Log tab grid to view information on the resolution of bind variables.

<b>Field or Control</b>	<b>Description</b>
<b>Occurrence</b>	<p>Displays the occurrence sequence. An occurrence is similar to a line number. Occurrences that are equal to zero are header-level variables. The system uses them anywhere in the document, but the data comes from the header record or the contract document creation wizard.</p> <p>Occurrences that are greater than zeros relate to each occurrence of a repeating structure, such as lines for purchasing contracts, in the document. For example, if the contract contains 10 lines and all 10 lines are included in the document, the occurrences are one to 10. However, if only 5 of the 10 lines are in the document, then the occurrences are 1 to 5.</p>
<b>Bind Type</b>	<p>Displays whether the bind is a wizard or transactional bind. <i>Wizard</i> type binds are those that are used with the document creation wizard. <i>Transactional</i> type binds originate from a source transaction. Nonwizard binds are also available, such as those that are related to the purchasing transactional contract or ad hoc binds.</p>
<b>Bind Variable</b>	<p>Displays the bind variable identifier.</p>
<b>Variable Value</b>	<p>Indicates the value that the system inserted in the document to replace the bind variable.</p>
<b>Bind Change Type</b>	<p>Displays the type of change that the system made to a bind when the bind was refreshed.</p>

<i>Field or Control</i>	<i>Description</i>
<b>File Type</b>	Displays whether the log is for an actual document or for an attachment.

### **Bind Variables: Wizard Details Tab**

Select the Wizard Details tab in the Bind Variables grid.

Use this grid to view information about bind variables that are used in the document creation wizard. Fields in this grid are the same as those in the **Wizard Log** grid.

<i>Field or Control</i>	<i>Description</i>
<b>Display Sequence</b>	Displays the display order in which the bind appeared to the author. This number is the same as the number shown in the <b>Wizard Log</b> grid and can be used to link the two together.
<b>Question Group</b>	Displays the question group for the document creation wizard from which this bind came.

### **Configurator Expansion**

Use this grid to review log warnings and details about how the system processed the document configurator during document generation.

<i>Field or Control</i>	<i>Description</i>
<b>Action</b>	Displays the action that was taken by the system when it generated the document.  See <a href="#">Understanding Log Generation</a> .

<b>Field or Control</b>	<b>Description</b>
<b>Generate Position</b>	<p>Displays the outline position to which this document content belongs in the document. This number is an internally generated number that the system uses to sequence the content as it is expanded for use in the document.</p> <p>This number may not exactly match the Microsoft Word outline number that appears in the actual document because it does not use paragraph numbering in the document. The field also includes expansion information for items that may ultimately not be used in the final document. These might be, for example, rules that the system evaluates to false. The system uses outline numbering in logging only to assist you in understanding the order of the elements and their relationships to each other.</p>
<b>Content Type</b>	Indicates whether the corresponding type for the content ID is <i>Clause</i> , <i>Section</i> , or <i>Rule</i> .
<b>Content ID</b>	Displays the name of the clause, section, rule that appears in the <b>Content Type</b> field.
<b>Message</b>	<p>Displays more information that is associated with the action.</p> <p>See <a href="#">Understanding Log Generation</a>.</p>
<b>Source Content ID</b>	Displays the parent content ID that resulted in the action. This is applicable only for certain actions and messages.
<b>File Type</b>	Displays the file type that this row belongs too. Document types include <i>Main</i> and <i>Amendment</i> .



# Managing Document Life Cycles

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## Understanding Document Life Cycles

The document life cycle is the process through which a document goes from its inception to its deactivation. The process ranges from document authoring creation, internal and external collaboration, approval, digital signature, execution, amendment processing, to document deactivation. The life cycle begins when you generate a document that is based on a document configurator and source transaction. Source transactions include:

- Ad hoc contracts for general use.
- Purchasing contracts for use with PeopleSoft Purchasing contracts.
- Purchase order contracts for use with Purchasing purchase orders.
- RFx documents for use with PeopleSoft Strategic Sourcing sourcing events.

The initial status of a generated document is always Draft. The document stays in this status for initial editing. Subsequent life-cycle statuses can include an optional Collaboration status, an Approved status with optional workflow, as well as a Dispatched and Executed statuses that are required. During the life cycle, the system tracks all versions and actions that are taken against the document.

For documents that are created from a source transaction of purchasing contract, purchase order, or sourcing event, the document life-cycle status is independent of the status of the purchasing contract, purchase order, or sourcing event. This accounts for timing differences between transactional contract execution and document execution. For example, a transactional purchasing contract may be approved for the original contract document execution, yet the current document status may be Draft due to the initiation of a recent amendment.

Unlike the transaction-based purchasing contracts, purchase orders, and RFx documents, you can use authored ad hoc documents for a variety of purposes. The variety and structure of document configurators that you define determine the extent of ad hoc document use. The primary difference between an ad hoc contract and a transaction-based document, such as a purchasing contract, is that documents that are generated from the purchasing contract (source transaction) are linked to the purchasing contract. The link occurs when the contract number and the values in the authored contract document refer back to specific values (bind variables) in the purchasing contract transaction. The ad hoc document content can reference values from the document management page and wizard bind values.

When using document types, you can associate ad hoc documents to purchase order requisitions in PeopleSoft Purchasing and PeopleSoft eProcurement. While creating the ad hoc document, you associate the business unit and the purchase order requisition ID to which you want to link the document. Then, after generating the document, you can click the **Attach to Requisitions** button to attach the document to the requisition. After attaching the document, you can use the Document Management page to access the requisition and, in turn, use the Requisition page to link back to the Document Management page. Links

are available on Purchasing and eProcurement requisition pages to access the document authoring system document.

Document content and structure is defined through document configurators (sections and clauses), wizards, and wizard bind values.

You can use one of these three methods to create new documents in the document authoring system:

- Create a new document using a document configurator.

This is a more standard creation method where the configurator is used along with the contract library to generate a contract document.

- Copy a new document from an existing document.

This method creates a contract document by copying it from an existing contract document. Bind variables are refreshed to reflect the values in the new contract. This method is available for all source transactions (ad hoc, purchasing contract, purchase order, and sourcing event).

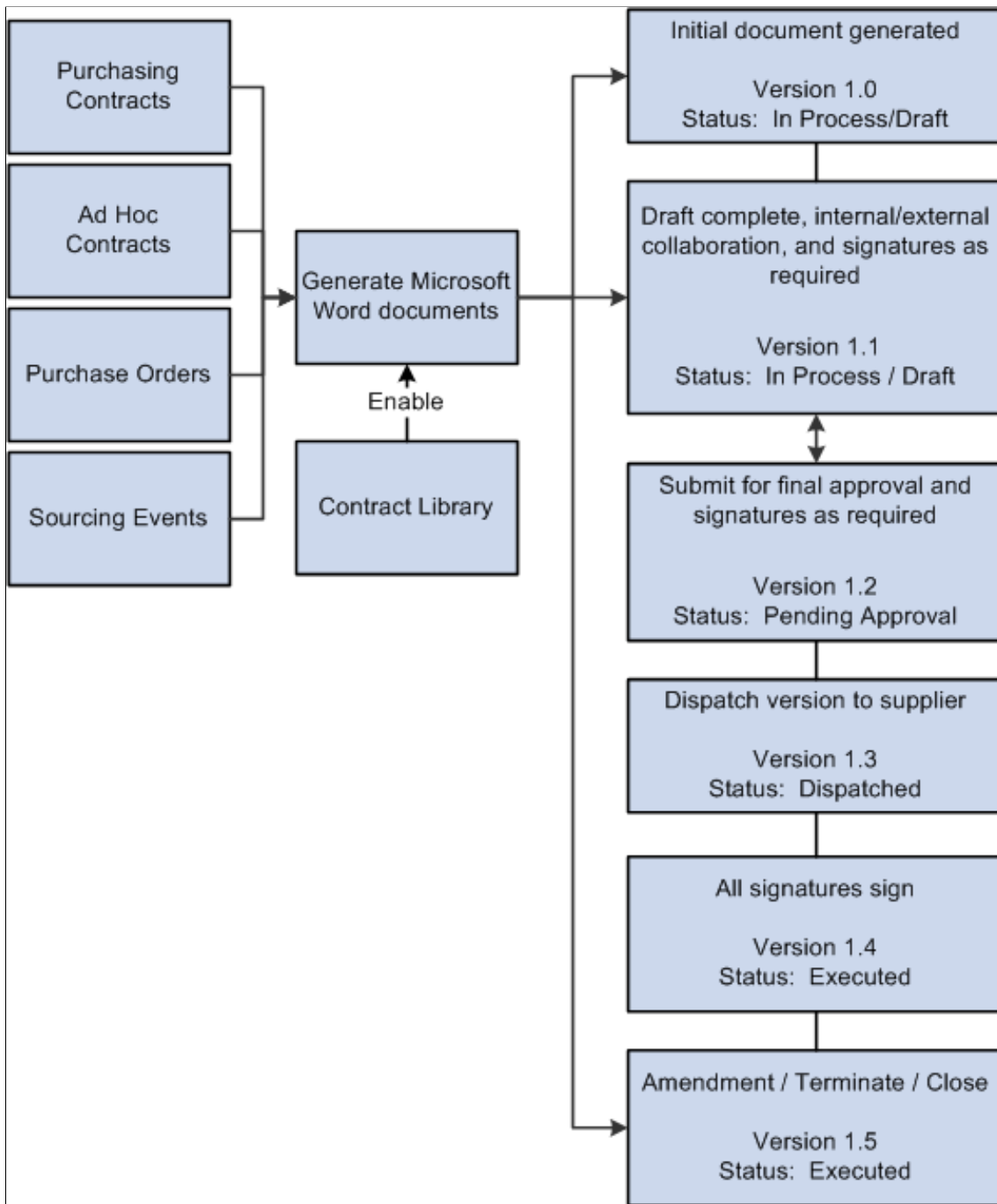
- Import a document from an external file.

This method enables you to create a document within the document authoring system from an external document. After importing the document, you can perform a limited number of life-cycle tasks for it, and the system indicates it as an imported document.

Depending on the type of documents you are adding to your system, you may have one or more of these methods available for your use.

This diagram illustrates that Microsoft Word documents can be generated from purchasing contracts, ad hoc contracts, purchase orders, and sourcing events. The Word document is formatted based on the contract library. The authored Word document then proceeds through the document lifecycle.

This example illustrates the life-cycle of a Microsoft Word contract document generated from a purchasing contract, ad hoc contract, purchase order, or sourcing event.



This example illustrates that the system assigns versions to the Word document each time it passes through certain steps of the document life-cycle. For example:

1. The initial document is created as version 1.0 with a status of In Process/Draft.
2. Version 1.1 of the document is created when the draft is complete, internal and external collaboration is complete, and signatures are obtained, if required. The document status is still In Process/Draft.

3. Version 1.2 of the document is created when the document is submitted for final approval and signatures are obtained, if required. The document status is Pending Approval.
4. Version 1.3 is created when the document is dispatched to the supplier. The document status is Dispatched.
5. Version 1.4 is created when all signatures have been obtained from the supplier. The document status is Executed.
6. Version 1.5 is created when the document has been amended, terminated, or closed. The document status is Executed.

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**Note:** When a RFx document is approved or complete, the document is accessible to Strategic Sourcing for posting and collaboration. Therefore, RFx documents do not allow signatures, they don't get dispatched, and they cannot be amended.

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## Understanding Life-Cycle Statuses and Actions

During the live cycle of a document, you can take many actions that can change the status of the document, which is tracked by the system. You can review the actions when [Viewing Document Version History](#).

This topic discusses:

- [Document Actions](#).
- [Document Collaboration Statuses](#).
- [Document Approval Statuses](#).

### Document Actions

As a document goes through its life cycle, the document authoring system tracks the actions and saves the changes that are made to the document. The actions that are performed on a document also determine the options that are available on the [Document Management Page](#). Typically, you initiate an action by clicking an option (button) and the system makes the appropriate actions depending on the current status of the document. The system tracks actions against documents using the Document Version History feature.

This table lists life-cycle actions and the results of those actions in the order that you would typically perform them. The actions apply to an initial document as well as amendments. However, with amendments, additional options are provided depending on the amendment option that you select when originally creating the amendment. See [Understanding Contract Document Amendments](#).



<b>Action Buttons and Links</b>	<b>Description and Results</b>
<b>Accept Supplier's Revisions and Finalize</b>	<p>Click to accept the document updates made by a user on the supply-side and to set the document status to Collaborated. This button is available for the contract administrator after users from the supply-side complete their collaboration.</p> <p>The system must be configured to enable external online collaboration with suppliers. The feature is only available if you have a portal configured for external users on the supply-side to access the system, and the document has an external contact and user defined as the primary owner of the document.</p>
<b>Add Attachments/Related Documents</b>	<p>Click to add attachments and documents that are related to the main document. Attachments can represent supplier papers, internal executive summaries, or other documents that are related to the contract. Attachments that have been added using the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information) for source transactions of a purchasing contract also appear on the Attachments page. Related documents are other documents that are created using Supplier Contract Management that you want to associate as being related to other documents.</p>
<b>Approve</b>	Click this button to approve the document if your organization uses Approval Workflow.
<b>Approval Details</b>	Click this link to view approval detail as a graphical workflow for a document.
<b>Attach to Requisition</b>	Click this button to attach a document, along with any comments that you enter, back to a purchase order requisition under the header comments. You can attach only one version of a document to a requisition at a time. This button is visible only if the ad hoc document is tied to a requisition ID. The document must be assigned to a document type that is set up for use with purchasing requisitions.
<b>Bypass Approvals</b>	Click this button to automatically set the document status to Approved. This option bypasses all approvals. Only administrators with proper authorization can expedite the approval of a contract by taking this action. The system logs this action. If approvals are not required, the system does not display this button.
<b>Cancel Approval Process</b>	Click to end the approval process. When contract administrators stop the document approval process, the system changes the document status to Draft.

<b>Action Buttons and Links</b>	<b>Description and Results</b>
<p><b>Cancel Collaboration</b></p>	<p>Click this button to stop collaboration on a document. This action is performed by the document owner.</p> <p>If you are canceling an internal collaboration cycle and no collaborators have responded to the collaboration request, the system displays a message that indicates that the document status will be set back to Draft. If one or more collaborators have already responded, the document administrator needs to finalize the collaboration before proceeding, and the status is set to Collaborated, Pending Review.</p> <p>If you are canceling an external collaboration cycle and the external user has not started to make changes, the system sets the document status to Draft. If the external user has already started making changes, the system displays a message that you that those changes will be lost if you proceed with canceling the collaboration.</p>
<p><b>Cancel Check Out</b></p>	<p>Click this button to cancel the check out of a document. Any changes that might have been made to the document are not saved, and the system records the action in the document history.</p>
<p><b>Cancel Signature Process</b></p>	<p>Click to stop the signature process for a contract document. This action rolls back the document to the last editable (.xml) version and removes signatures that have been entered on the document. After canceling the signature process, you can change the document and prepare it again for signatures.</p>
<p><b>Cancel Signing</b></p>	<p>Click to cancel the check out of a document that is being signed. This button only appears for the user who has the document locked for signing and the document administrator.</p>
<p><b>Change to New Source</b></p>	<p>Click to change the source transaction type for an imported ad hoc document. This button only appears for imported ad hoc documents on the <a href="#">Document Management Page</a> and enables you to access the <a href="#">Change Source Transaction Page</a>. You can change the source from an ad hoc document to a purchase order or purchasing contract document. The change is permanent and after you make the change, the button is no longer available.</p>
<p><b>Check In</b></p>	<p>Click this button to check in a document that has been checked out. The system prompts you to select the checked out file, upload it, and define version updates. If you are checking in an amended contract that is in an amendment cycle, and the amendment option is <i>Amend Contract with Amendment Files</i>, then the system asks you if you want to automatically update the amendment file with the changes made to the amended contract.</p>

<b>Action Buttons and Links</b>	<b>Description and Results</b>
<b>Compare Document</b>	<p>Click this button to compare the differences between the current version of a document and a re-created, or refreshed, version of the same document. This button is available only if you have set up the system for document comparisons.</p> <p>Use the <a href="#">Installation Options - Supplier Contract Management Page</a> to define comparison and rendering settings.</p>
<b>Compare Selected Word Documents</b>	<p>Click this button to compare two documents that you select from the <a href="#">Document History Page</a>.</p>
<b>Compare Revised Documents</b>	<p>Click this button to compare a revised document from a supplier with the current version of the document. This enables you to compare the changes may have been made by the supplier. The system opens a new temporary document that shows the changes, which is similar to comparing the files using the Microsoft Word compare functionality.</p>
<b>Complete Document</b>	<p>Click this button to indicate that the document is in a completed status. The button appears when a document is tied to a corresponding document type that has been set up with Draft/Complete statuses instead of full life-cycle statuses.</p> <p>When you complete a document, modifications are complete and additional collaboration is not necessary.</p>
<b>Copy Document</b>	<p>Click this button to create a document using an existing document. The copy document function creates a new document starting with the source document content, and then runs a refresh to update bind values and content based on the bind values of the target contract.</p>
<b>Create Amendment</b>	<p>Document owners use this action to create a formal amendment to the current executed document. The system sets the document status to Draft, sets the amendment cycle to 1.00, and the portion of the life cycle that pertains to amendments begins. The administrator can still control the versions of the document.</p> <p>Most actions in this table that apply to the original version of a document also apply to the amended version. The system maintains the executed version of the contract. Multiple handling options for amendment files are available to support the different amendment processes. See <a href="#">Understanding Contract Document Amendments</a>.</p>
<b>Create Document</b>	<p>After you select a source transaction and document configurator ID, click this button to create the initial draft version of a document. Only users with proper document administrator authority can perform this action.</p> <p>See "User Preferences - Supplier Contract Management Page" (Application Fundamentals) and <a href="#">Generating Microsoft Word Documents</a>.</p>

<b>Action Buttons and Links</b>	<b>Description and Results</b>
<b>Deactivate Document</b>	<p>Document administrators use this action when they determine that a document should not be available for use. The system updates the document status to Inactive. You can use this status to close contracts. The system displays this message after a document has been deactivated: <b>This Document Has Been Deactivated.</b> The system retains the current document status at the time the document is deactivated.</p>
<b>Decline Signing Document</b>	<p>Click this button to decline the action of digitally signing the document, and enter comments to the document. Using this option could be due to a variety of reasons, such as a signature field is not in the PDF file or the document needs revising. The system updates the <a href="#">Document Management Page</a> to indicate that the document has been declined.</p> <hr/> <p><b>Note:</b> Performing internal approval of a document and digitally signing it are independent actions. Some users may have to approve the document using PeopleSoft Approval Framework and then sign the document. Depending on how your system is set up, you may be capturing signatures before, during, or after the approval process.</p>
<b>Dispatch</b>	<p>Click to select and send original documents, attachments, amendments, or any combination of these to suppliers for final signatures. The document owner performs this action. You can also use this action to initiate the collection of digital signatures on the Supplier Portal for external suppliers. The system updates the document status to Dispatched to indicate that the routing to suppliers for signatures is in process. This button appears only when the document is in an Approved status.</p>
<b>Document Details</b>	<p>Document administrators can click this link to update information about the document including administrator, document type, sponsor, department, description and any user-defined field attributes. For ad hoc documents, you can also change the begin date and expire date of the document. The <a href="#">Document Details Page</a> also provides information about document cycle times, document creation, and processing activities.</p>
<b>Document Modification Summary</b>	<p>Click this link to view changes, such as new, changed, or deleted clauses, that have been made to a document.</p>
<b>Document Version History</b>	<p>Click this link to access the <a href="#">Document History Page</a> where you can view the history and version details for a document.</p>
<b>Document View Access</b>	<p>Click this link to grant permission to users to view the document and to review the collaborators who have permission to view the document. You can assign view access based on the role of the user.</p>

<b>Action Buttons and Links</b>	<b>Description and Results</b>
<b>Edit Amended Document</b>	Click this button to edit a document that has been amended. The button is only available when you create an amendment using the amendment option: Amend Contract with Amendments. This option enables you to check out and amend the main contract. You can also edit the amendment file using the <b>Edit Amendment File</b> button. When you check out an amended document, the system updates the <a href="#">Document Management Page</a> to indicate that the document is checked out, and provides <b>Check In</b> and <b>Cancel Check Out</b> buttons for the document.
<b>Edit Amendment File</b>	Click this button to edit an amendment file. This file contains a summary of changes for the amended document. When you check out the file, the system updates the <a href="#">Document Management Page</a> to indicate that the file is checked out, and provides <b>Check In</b> and <b>Cancel Check Out</b> buttons for the file.
<b>Edit Document</b>	Click this button to edit and check in a revised version of a document. Generally, only users with proper document administrator authority can edit the document. However, users who are defined as collaborators (interested parties) can also edit the document during the collaboration cycle if they have edit privileges. During the amendment cycle, this button opens one of two files depending on how you are maintaining amendments for the document.
<b>Execute Contract</b>	Click this button to indicate that the original document has been signed off by all parties and is frozen. Document owners perform this action. At this point you can create an amendment for the document, send it back to contacts, or reset the document to Dispatched status. The system updates the document status to Executed after you click this button.
<b>External Contacts/Signers</b>	Click this link to add and update external contacts for a document. The system uses values that are defined on the <a href="#">External Contacts Page</a> as default values when you send or dispatch documents. In addition, the attributes that are required to access documents through the supplier portal are defined for external users using this page.

<b>Action Buttons and Links</b>	<b>Description and Results</b>
<b>Finalize Collaboration</b>	<p>Click to complete collaboration after all collaborators have responded to a collaboration request. The document owner performs this action. For internal collaboration, the owner should review the current version of the document and review and approve any changes in the document, before clicking this button.</p> <p>For external collaboration, when you click this button, the system disregards any supplier, or external user, changes, and continues using the current version of the document. If you want to incorporate some or all of the supplier changes, but do not want to take the supplier's version as is, you can check out the original version sent to the supplier, make your own changes, and then check in the document before finalizing it. This may be necessary if a supplier made too many changes and you only want a couple of them, or if the supplier returned the document in an incorrect Microsoft Word format that does not have a .xml file extension.</p> <p>If you want to use the supplier's version and make it the current version, use the <b>Accept Supplier's Revisions and Finalize</b> button. The system updates the document status to Collaborated when collaboration is finalized.</p>
<b>Generation Log</b>	<p>Click this link to review warnings, wizard information, and configurator expansion information that the system gathers during the generation or re-creation of a document.</p>
<b>Import Document</b>	<p>Click this button to import prior, executed versions of a document. When the current version is already in an amended state, then you can import prior versions. You can import only one version for each prior amendment number within a contract. See <a href="#">Importing Documents</a>.</p>
<b>Import Prior Document</b>	<p>Click this button to access the Import Document page where you can import a prior version of a document after you have generated the document. The button is only available when a document is eligible to have a previous version imported.</p>
<b>Internal Contacts/Signers</b>	<p>Click this link to view or maintain the internal collaborators and signers defined for the document.</p>
<b>Create/Maintain Executive Summary</b>	<p>Click to access the <a href="#">Executive Summary Page</a> where you can view, update, refresh, and re-create an executive summary document.</p>
<b>Mark as Reviewed</b>	<p>Collaborators use this action when they are finished reviewing and potentially changing the document, or adding collaboration comments. When the final collaborator uses this action, the system sends a notification to the document administrator.</p>

<b>Action Buttons and Links</b>	<b>Description and Results</b>
<b>Modify Attachments/Related Documents</b>	Click to update attachments and documents that are related to the main document. The attachments can represent supplier papers, internal executive summaries, or other documents that are related to the contract. Related documents are other documents that are created using Supplier Contract Management that you wish to associate as being related to other documents.
<b>Modify Collaboration</b>	Click this button to update the list of collaborators when a document is pending collaboration. The system opens a separate page that enables you to view the status of current collaborators and add new users to the list. In addition, you can route the document for collaboration, which sends notifications to the new users that were added to the collaboration process.
<b>Notify Me</b>	<p>Click this button to create a list of people who should be notified when a document is checked in. The system provides this button when a document is checked out by someone other than yourself. The system tracks the date and time when you enter an email address for the person to be notified. The system provides a <b>Notify When Available Template</b> field on the <a href="#">Installation Options - Supplier Contract Management Page</a> where you can select a notification template to use when this button is clicked.</p> <p>The Notify Me function is useful when you route a document for internal collaboration and it can be edited on a first-come, first-serve basis. If a user attempts to edit a document and someone else has it checked out, the user can setup a notify option to receive an email when the document becomes available.</p>

<b>Action Buttons and Links</b>	<b>Description and Results</b>
<p><b>Prepare Document for Signing</b></p>	<p>Click this button to access the <a href="#">Prepare Document for Signatures Page</a> where you can verify that the list of signers is accurate and add those who need to sign the document. Internal signers must be in the list so that they have access to the document and that the system provides them the appropriate tasks on the <a href="#">Document Management Page</a>.</p> <p>This action converts (creates a copy) the document to the appropriate signature method defined on the <a href="#">Installation Options - Supplier Contract Management Page</a>. After preparing the document for signatures, you cannot make additional changes to the editable version of the document. You use the <b>Internal Contacts List</b> and <b>External Contacts List</b> links to establish document signers.</p> <p>Showing this button on the Document Management page also depends on the document type settings. When internal signatures have been enabled, you can define when a document should be ready for signing, such as prior to, during, or after approvals.</p> <hr/> <p><b>Note:</b> The list of signers in an internal contact and external contact list act independently of actual signature fields defined within the document when the document is prepared. Depending on your needs and signing scenarios, you can establish one or more signature clauses and include them in an authored Microsoft Word document prior to preparing the document for signing. In more complex scenarios, you can use rules to drive which signature clauses are included during document authoring, or refresh tasks based on the signature list that you define for each document or based on wizard questions.</p>
<p><b>Preview Approval</b></p>	<p>Click this button to view approvals for the document. When document approvals are required, this action enables administrators to review the approval process prior to submitting the document for approval. Use the <a href="#">Installation Options - Supplier Contract Management Page</a> to indicate whether document approval is required. If the system doesn't require approvals, it does not display this button. See <a href="#">Understanding Document Approvals</a>.</p>
<p><b>Reactivate Document</b></p>	<p>Document administrators use this action to activate a document that has been deactivated. The document remains in the same status that it was in when it was deactivated.</p>



<b>Action Buttons and Links</b>	<b>Description and Results</b>
<b>Recreate Document</b>	<p>Click this button to completely re-create the document and rerun associated wizards to view and update wizard values. During re-creation, the system removes document contents and does not save manual edits that had been made to the original document in the re-created document.</p> <p>If you specify a new version when re-creating the document, you can view previously generated and edited versions of the document using the <b>Document Version History</b> link. When you are working with amendments, the amendment processing option that you select determines whether you can re-create the amendment file or the primary document.</p> <p>See <a href="#">Generating Microsoft Word Documents</a>.</p>
<b>Refresh Document</b>	<p>Click this button to update the bind values in a document. The system uses a copy of the most current version of the document, evaluates changes to bind variable values that are referenced in the document, and replaces those values in the document with the most current values in the system, such as the values in a purchasing contract. The system also evaluates rules that use bind variables and might change the document content based on the evaluation.</p> <p>When a bind variable is not used in a rule and does not repeat, such as a contract amount or wizard value, the system replaces the value within the clause. Edits that have been performed within the related clause are not lost. However, when a bind variable is used in a rule, or does repeat, and changes are made, such as changes to a contract line, then the system re-creates the entire repeating or rule section and replaces it in the authored document, including any clause text.</p> <p>The system produces a new version of the document unless you specify to use the same version as part of the refresh process. When you are refreshing an amendment, the amendment processing option that you select determines whether you can refresh the amendment file or the primary document. See <a href="#">Refreshing Microsoft Word Documents</a>.</p>
<b>Redispatch</b>	<p>Click this button to dispatch a document to external users again. This button is only available when the document status is Dispatched. This action can be useful if dealing with multiple external parties, or if the document needs to be rerouted for signatures.</p>
<b>Reset to Dispatch</b>	<p>Click this button to reset the status of a document from Executed to Dispatched. This provides a means to make updates to a document without going through the amendment process. For example, you can fix a minor typographical error in the contract without creating a formal amendment. Only administrators with proper user authorization have access to this button and can reset the executed document to a Dispatched status.</p>

<b>Action Buttons and Links</b>	<b>Description and Results</b>
<p><b>Route Externally</b></p>	<p>Click this button to send a document for external collaboration. External collaboration enables you to send documents to the primary document owner for external collaboration. After you submit a document for external collaboration, the system essentially locks the document while waiting for the supplier to respond. However, during this process, the contract specialist and administrator can cancel the external collaboration cycle if needed.</p> <hr/> <p><b>Note:</b> The external routing feature is only available if you have a portal configured for the supply-side so that external users can access the system, the document has an external contact, and the user is defined as the primary owner of the document. This information can be maintained from document to document and defaulted from the supplier definition contact information for a contract collaborator type contact.</p> <hr/>
<p><b>Route for Internal Signatures</b></p>	<p>This button is available for document administrators when the system is configured to allow routing for signatures before or after approvals. Click this button to send the document to internal signers for digital/electronic signatures. The system routes the document in sequential order according to each person listed as a signer on the Internal Collaborator/Signers page. The system skips those who have already signed the document. After everyone in the list has signed the document, the system completes the route for internal signature and notifies the document administrator.</p> <p>This button only appears when the document has been prepared for signing and when the document type has been set up to route for internal signatures. Use the Life Cycles Options section on the <a href="#">Document Type Page</a> to select routing options. When you select the Enable Internal Signatures option in the Life Cycles Option section, the system activates three additional check boxes: <b>Prior to Approvals</b>, <b>During Approvals</b>, and <b>After Approvals</b>. If you select the <b>Prior to Approvals</b> or <b>After Approvals</b> check box, this button appears. If you select During Approvals this button does not appear on the Document Management page. See <a href="#">Setting Up Document Types</a>.</p> <hr/> <p><b>Note:</b> After a document is prepared for routing, external signatures can be accomplished before or after internal approvals using the <b>Send to Contacts</b> or the <b>Dispatch</b> buttons.</p> <hr/>

<b>Action Buttons and Links</b>	<b>Description and Results</b>
<p><b>Route Internally</b></p>	<p>Click this button to set up collaboration and to send notifications to internal contact users who need to review and provide feedback for a document. Document owners perform this action. The system begins the process using the administrator's default list of collaborators defined on the My Contacts/Collaborators page. You can modify this list to include or exclude additional users before clicking the <b>Route for Collaboration</b> button. The system sends notifications to all users simultaneously.</p> <p>Users who have edit authority can check out and edit the document on a first-come, first-served basis. When the document is sent, the system sets the document status to Pending Collaboration. Only users who have document administrator authority can send the document. You can apply this action to the original document as well as amendments.</p> <hr/> <p><b>Note:</b> Collaboration is not intended for use with external users. Use the <b>Send to Contacts</b> or <b>Route Externally</b> buttons to send and collect feedback from suppliers.</p>
<p><b>Send to Contacts</b> (send document to contacts)</p>	<p>Click this button to send the document to contacts. Document owners perform this action when they want to send an original executed document, current document, document amendments, attachments, or any combination of documents to external or internal contacts. In addition, you can use this button to route the document to external contacts for their digital signature. This routing is online and uses the Supplier Portal. The document format can be .xml, .doc, or .pdf; depending on how the rendering options are set on the <a href="#">Installation Options - Supplier Contract Management Page</a>.</p> <p>When sending documents to contacts, such as suppliers, owners can change the document status to Checked Out, using the <b>Set to Checked Out</b> check box. This prevents internal changes to the document while it is at the supplier's location. When the document status is Checked Out, the Document Management page displays the message: <b>File locked for external review.</b></p> <p>When a document is prepared for digital signatures, the <b>Send to Contacts</b> button enables you to send the signature-ready PDF file using email. You can also use the supplier-side portal if the system is configured for it. To route for external signatures using the supplier-side portal, the document must have an external primary owner that specifies that a signature is required. If multiple signatures are required from an external organization, the primary document owner must route the PDF manually, within that organization, to capture external signatures and then upload the final, signed document through the supplier-side pages. See <a href="#">Signing External Documents</a>.</p>

<b>Action Buttons and Links</b>	<b>Description and Results</b>
<b>Sign Document</b>	<p>Click this button to lock the document for signing. The button only appears for users who are listed as a signer for the document and have not signed the document. This action locks and opens the document, enables you to digitally sign the document, and then upload it back to the system. When using approval processing and capturing signatures during the approval process, the user who is approving the document also sees the <b>Sign</b> button on the <a href="#">Document Management Page</a> when the approval step is awaiting the user.</p> <hr/> <p><b>Note:</b> Signing and approving, denying, or pushing back within a workflow are separate actions.</p>
<b>Sign Document (On Behalf)</b>	<p>Contract administrators click this button to sign a document on behalf of an internal signer. The system locks the document for signing and opens it for the administrator to sign. After signing, the document needs to be uploaded. This button enables an administrator some flexibility to capture signatures offline if corrections are needed or a user is marked as signed but did not actually sign the document.</p>
<b>Stop Internal Signatures</b>	<p>Contract administrators use this button to cancel the internal signature process and access the Stop Route for Internal Signatures page. The system takes the document out of the route for internal signature process and notifies users.</p>
<b>Submit for Approval</b>	<p>Click this button to start the approval process. When the system requires document approvals, this action submits the document for workflow approval. Administrators take this action after collaborating final internal contract approval.</p> <p>Administrators can add additional approvers or reviewers for the document. Submitting a document for approval applies to the initial version of the document and amendment processing.</p> <p>If the system is set up to capture internal signatures during approval and there are internal signers listed for the document, then the <b>Sign Document</b> button appears for each user in the approval process at that user's step for approval. Users should sign and upload the document followed by marking the document as approved.</p> <p>After the document is approved, the system updates the document status to Approved. If approvals are not required, the system does not display this button.</p> <p>See <a href="#">Understanding Document Approvals</a>.</p>
<b>Upload a Document Attachment File</b>	<p>Click to upload a document attachment for the main document. Attachments can represent supplier papers, internal executive summaries, or other documents that are related to the contract. Attachments that have been added using the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information) for source transactions of a purchasing contract also appear on the Attachments page.</p>

<b>Action Buttons and Links</b>	<b>Description and Results</b>
<b>Upload another Document Attachment File</b>	Click to upload a document attachment for the main document.
<b>Upload Prepared Document</b>	<p>Click this button to upload a prepared for signature document. This button only appears when you are preparing a document for signatures. When preparing a document for signatures using Adobe Acrobat, the document owner must certify and enable usage rights using an Adobe Acrobat Professional version. Adobe Professional is required for all administrators because enabling usage rights for the document enables other signers with the Adobe Reader security to sign the document.</p> <p>When preparing a document for signatures using Word 2007, the document owner must certify and sign the contract document before it is ready to be signed by others. This prevents the document from being accidentally modified by others after it has been certified.</p> <hr/> <p><b>Note:</b> For Adobe Acrobat, if the administrator uploads a prepared document that has not had usage rights enabled, then users the only have Adobe Reader are not permitted to add a signature.</p>
<b>Upload Signed Document</b>	Click this button to upload the signed document after you have digitally signed the document. This action updates the signature status to Signed. If the document is being routed for internal signatures before or after approvals using the <b>Route for Internal Signatures</b> button, then the system routes the document to the next signer in the list.
<b>View</b>	Click to view delete attachments and documents that are related to the main document. Attachments can represent supplier papers, internal executive summaries, or other documents that are related to the contract. Attachments that have been added using the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information) for the purchasing contract source transaction appears on the Attachments page. Related documents are other documents that are created using Supplier Contract Management that you wish to associate as being related to other documents.
<b>View Amended Document</b>	Click this button to view an amended document.
<b>View Amendment File</b>	Click this button to view an amendment file. This is a file that tracks a summary of changes in the document.
<b>View Document</b>	Click to view, but not check out, a document. Users who have document administrator authority, are defined as collaborators (interested parties), or are approvers of the document, can view the document.

<b>Action Buttons and Links</b>	<b>Description and Results</b>
<b>View Executive Summary</b>	Select to view an executive summary of the contract document. The executive summary is available for all internal users who have view access of the document. This button is available after the summary has been created and during document approval.
<b>View Original Document</b>	This button appears only when the current document is an amendment, and the amendment option is Amendment Files Only. Click this button to view, but not check out, the originally executed document. The <b>View Document</b> button appears in addition to this button so that you can view the current amendment.
<b>View Revised Document</b>	Click this button to open a document that has been collaborated on with an external user (supplier). This button appears on the contract owner's <a href="#">Document Management Page</a> after a supplier has completed their review.
<b>Where Used as Related Document</b>	Click this link to access the <a href="#">Search for All Content Instances Page (Search Content by Type)</a> , which provides details about where this document has been added to another document as a related document. Use the <b>Modify Attachments/Related Documents</b> link or the <b>Add Attachments/Related Documents</b> link to add or update related documents. This link automatically appears on documents that have been linked as related documents on other documents.

## Document Collaboration Statuses

Collaboration is an optional part of the document life cycle. Documents can go from a Draft status to an Approved status without going through the collaboration cycle. The system tracks the collaboration process and provides messages of the current document status.

This table describes collaboration statuses for documents:

<b>Status</b>	<b>Description</b>
Pending Collaboration	The document has been routed for collaboration, but not all collaborators have responded.
Pending Internal Review	The document has been reviewed and updated by a user on the supply side. It has been returned to the document owner or contract specialist for reconciliation.
In External Collaboration	The document has been sent to a user on the supply side (external user) who is designated as the primary document owner.

<b>Status</b>	<b>Description</b>
Collaborated, Pending Review	The document has been reviewed by all internal collaborators and is awaiting a final review by the document administrator or owner.
Collaborated	The document has been reviewed by all external or internal collaborators, and the document administrator or owner has reviewed and updated the document based on the reviews.

## Related Links

[Collaborating on Documents](#)

## Document Approval Statuses

Approval statuses are controlled by the Approval Workflow Framework when document approvals are required using the [Installation Options - Supplier Contract Management Page](#). When document approvals are not required, the system displays only the **Approve** button, which the document administrator uses to set the document status to Approved.

When a document progresses through its life cycle, statuses provide the current state of the document and also determine which buttons are available on the [Document Management Page](#).

This table describes approval-related statuses for documents:

<b>Status</b>	<b>Description</b>
Pending Approval	The document has been submitted for approval and is waiting for the approval of one or more users. In addition, the system sets a workflow status for approvers to Pending for each approver that is required. You can submit a document for approval while it's in a Draft or Collaborated status.
Approved	The document has been approved by all approvers. You can dispatch and execute the document at this point.
Draft	When any step is denied during the approval workflow process, the entire workflow is denied and terminated. The document status is set from Pending Approval to Draft. After reviewing document comments, the document administrator can update the document and begin the approval process again by submitting the document for approval.
Complete	When using document types, you can set a document to complete by clicking the <b>Complete</b> button.

## Related Links

[Understanding Document Approvals](#)

[Defining User Preferences and Installation Options for Document Approvals](#)

[Approving Clauses](#)

[Approving Sections and Controlling Document Configurator Availability](#)

[Approving Documents](#)

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## Understanding the Sourcing Event (RFx) Document Process Flow

The sourcing event process flow utilizes PeopleSoft Strategic Sourcing and PeopleSoft Supplier Contract Management. These steps describe the application, user role, and transactions needed to complete the document process for a sourcing event.

SS is PeopleSoft Strategic Sourcing.

SCMT is PeopleSoft Supplier Contract Management.

### Sourcing Phase from SS (Strategic Sourcing)

1. (SS) Internal sourcing specialist creates an event and authors an associated RFx document within SCMT.

(optional) Internal collaboration of event with RFx access for other departments such as legal, if required. Any changes to the RFx document are performed within SCMT.

The sourcing specialist changes the RFx authored document to complete or approved within SCMT.

2. (SS) The internal sourcing specialist posts the event with the RFx document.
3. (SS) External bidders, suppliers, or both, respond to the events and indicate that the RFx document has been reviewed.

(optional) Allow bidders, suppliers, or both, to make changes to a version of the RFx document.

4. (SS) Internal sourcing

(optional) The sourcing specialist routes the current RFx document for internal collaboration and review.

(optional) The sourcing specialist revises the authored RFx document (from SCM), or the bidder-specific RFx document (from SS), or both, if bidder modifications are allowed on RFx documents.

(optional) The sourcing specialist creates new rounds or version and posts as usual.

5. (SS) The internal sourcing specialist awards the event internally, and creates a purchasing contract or a purchase order.

### Contract Phase from SCMT (Supplier Contract Management)

1. (SCMT) The internal contract specialist authors a purchasing contract document or purchase order document by copying from the RFx document.

(Optional) The sourcing specialist routes the current RFx document for internal collaboration and review.



2. (SCMT) External suppliers review, collaborate, and sign the awarded contracts.
3. (SCMT) Internal users approve and sign the authored contract document for execution.

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**Note:** When the document type for a supplier's contract is linked to a multi-source configurator, and used for a Sourcing Event RFX or PO Contract or purchase order document, then the creation of the contract document may allow using an authored (xml) RFX document as the starting point for the contract document. The original RFX authored document (or bidder document) must originate from a valid, authored, xml word document for this to occur. In this case the newly authored contract document starts from the RFX document and is refreshed based on the target purchase order contract or purchase order and usage of any bind values. If the sourcing event RFX document is not valid for this type of processing, you can use the RFX document as a starting point for the purchase order contract or purchase order document as an imported document.

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## Common Elements Used When Managing Document Life Cycles

<i>Field or Control</i>	<i>Description</i>
<b>Administrator</b>	<p>The user ID that indicates who is the administrator for this document. A document administrator has the authority to create, edit, and control the status for documents that he or she creates or documents that are associated with users who have been authorized for document access.</p> <p>If you are creating a purchasing contract document, the system populates this field with the administrator from the purchasing contract.</p> <p>If you are creating a purchase order document, the system populates this field with the buyer from the purchase order.</p> <p>If you are creating an RFX document, the system populates this field with the administrator from the sourcing event.</p> <p>See "User Preferences - Supplier Contract Management Page" (Application Fundamentals).</p>
<b>Approved On</b>	<p>This is a date field that indicates when the document owner or administrator approved the document. When the system displays this field, the document has been through all approvers in the approval process, the approval process has been canceled, or the approval process has been bypassed.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Configurator ID</b>	<p>Represents the document configurator that provides the basic structure for the purchasing contract or ad hoc document. The configurator also controls the content of a document. If you are adding a document, you select the configurator from the list or can be derived when a configurator selector wizard is used. You define configurators using the Document Configurators feature in the Manage Contract Library component. When you build the configurator, you select document elements to build the document. The value in the <b>Availability Status</b> field must be <i>Available</i> for the configurator to appear in lists of values.</p> <p>Configurators are based on two sources. The first is a purchase contract transaction and the other is an ad hoc type. When you initially add a document, you select the transaction source that matches the type of document you want to create. Then, only document configurators that match the type of document you want to create are available for selection.</p>
<b>Configurator Selector</b>	<p>Click this button to launch the configurator selector wizard if one is defined for the given document type. This special type of wizard enables you to develop and use a series of questions that are designed to select the appropriate document configurator for the document that you want to create.</p> <p>The configurator selector wizard automatically runs between the Add Document and Create Document pages, if necessary, based on the document type. The <b>Configurator Selector</b> button also appears on the Create Document page to enable you to run the configurator selector wizard again as needed.</p>
<b>Collaborated On</b>	<p>This is a date field that indicates when the document completed the collaboration process. When the system displays this field, the document owner or administrator has reviewed and updated the document based on collaborator reviews. You can route the document to contacts or dispatch it.</p>
<b>Contact</b>	<p>People to whom you might send documents, dispatch documents, or collaborate with during the life cycle of a document. Contacts can be internal or external and their setup information includes name, address, phone, email, and title.</p>
<b>Copy Document</b>	<p>Click this button when you to create a document by copying an existing document. The button is available only upon initial entry and a document does not exist.</p>
<b>Created On</b>	<p>This is a date field that indicates when the document was created. The system adds this value when you initially create the document. If you amend the document, the system updates the field.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Department</b>	Represents the department with which this document is associated. The department might be the group of people who use the document or the group who is responsible for maintaining or digitally signing the document.
<b>Description</b>	Enter a description for the document. This is a required field.  If you are creating a: <ul style="list-style-type: none"> <li>• Purchasing contract document, the system enters the description from the purchasing contract.</li> <li>• Purchase order document, the system uses the purchase order description as the default value for purchase order ID.</li> <li>• Sourcing event, the system uses the event description from the event ID</li> </ul>
<b>Dispatched On</b>	This date field indicates when the document or an amendment was sent as a formal document to suppliers for signatures. The system updates this field only if a document goes through the approval or collaboration process again and is then dispatched.
<b>Document SetID</b>	The SetID to which all elements in a document, such as clauses, sections, and wizards, belong.
<b>Document Type</b>	Document types can help you organize and further categorize documents that you use in the document authoring system. Using document types, you can define specific settings, defaults, and security that can help fine-tune the use of each type of document. The use of document types requires that you select the <b>Use Document Type</b> check box on the Installation Options page. This field does not appear if the check box is not selected; however, if it is selected, the field is required.
<b>Document View Access</b>	Click this link to view and update those users who have view access for the document by role name.
<b>Executed On</b>	This date field indicates when the document owner or administrator sent the contract as a frozen document. After this date, you cannot edit the document unless you create an amendment or reset the document to dispatch.
<b>External Contacts List</b>	Click this link to update the external contacts list. When you send a document to contacts, the system uses this list to populate the Send to Contacts page.

<b>Field or Control</b>	<b>Description</b>
<b>Import Document</b>	Click this button to import a legacy document or a contract. Legacy documents and contracts are those preexisting contract and ad hoc documents that were not created in the document authoring system. The button is only available when a document does not exist. The system places imported documents into the document authoring system.
<b>Imported Document</b>	This is an indicator that appears on the Document Management page to inform you that a document was imported into the system. Some system features that are available for documents that are created within the system aren't available for those that have been imported.
<b>Last Modified On</b>	This date field indicates when changes were last made to the document. For example, if an approver or a collaborator made an edit to the document, the date and time of the edit appears in this field.
<b>Save</b>	Click this button to save an ad hoc or purchasing contract document's attributes prior to creating the formal document. This button is available only on the Create Document page.
<b>Source Transaction</b>	Select a source transaction (Ad Hoc, Purchase Orders, Purchasing Contracts, or Sourcing Events).  Enter the key information pertaining to the document to be added. Based on the source transaction that you select, either the Contract ID, PO ID, Event ID, or the Ad Hoc ID field appears.
<b>Sponsor</b>	Select a sponsor for this document. A sponsor should represent a user from the department that is sponsoring the contract.
<b>Supplier ID</b>	Displays the supplier for the contract. The system populates and displays this field when you create a document based on a contract ID.

## Finding Authored Documents in Supplier Contract Management

### Pages Used to Find Authored Documents

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Find an Existing Document Page</u>	CS_DOC_FIND	Review and modify existing supplier contract documents.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Keyword Search for Documents Page</u>	CS_DOC_FIND_SES	Search on keywords and other attributes and then review and modify supplier contract documents.

## Find an Existing Document Page

Use the Find an Existing Document page (CS\_DOC\_FIND) to review and modify existing supplier contract documents.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Find an Existing Document** link.

This example illustrates the fields and controls on the Find an Existing Document page.

**Find an Existing Document**

\*Source Transaction  ▾

Contract Style  ▾

Document Type  ▾

\*SetID  🔍

Supplier SetID  🔍

Supplier Name  🔍

Description

Administrator  🔍

Sponsor  🔍

Department  🔍

Contract ID  🔍

Supplier ID  🔍

Short Supplier Name  🔍

All Statuses
  Draft/Collaborated
  Pending Approval
  Dispatched

Pending Internal Collaboration/Review
  Approved
  Executed/Complete

Pending External Collaboration/Review
  Denied
  Pending Internal Signatures
  Pending External Signatures

This example illustrates the fields and controls on the Find an Existing Document page. You can find definitions for the fields and controls later on this page.

This example illustrates the fields and controls on the Find an Existing Document page. You can find definitions for the fields and controls later on this page.

Search Results

Documents | Details

Delete	Document Keys	Description	Document Version	Amendment	Document Status	Days In Status	Awaiting User	Cycle Start Date	Cycle Due Date
<input type="checkbox"/>	SHARE / SPP00000000000000000000000000000001	Special Purpose Contract	0.00	0	Approved	1788	Keith Olander	05/02/2016	05/06/2016
<input type="checkbox"/>	SHARE / POC0081	Business Desktop PC	0.00	0	Approved	1829	Calvin Roth	03/21/2016	03/25/2016
<input type="checkbox"/>	SHARE / GRP00000000000000000000000000000004	Master Service Agreement	0.00	0	Approved	1788	Calvin Roth	05/02/2016	05/06/2016
<input type="checkbox"/>	SHARE / GRP00000000000000000000000000000001	Group Single Supplier Contracts	0.00	0	Approved	1829	Calvin Roth	03/21/2016	03/25/2016

Delete Selected Documents

Use this page to search for documents based on any of the various combinations of search criteria fields. For example, if a document is stalled in an internal collaboration where multiple organizations and collaborators are behind schedule, you can view the status of the document, such as the user for which the document is waiting. On the Find an Existing Document page, check boxes allow you to perform a more granular selection of documents in various statuses.

To search on the cycle start date, due date, or cycle status values in the Addition Search Criteria section, you must enable document cycle times and define time restraints for completing contract documents. The system uses the number of days cycle time along with the document's due date to calculate time remaining for collaboration and approvals. The system also provides red, yellow, and green indicators as warnings for when a document is nearing its due date.

After you enter search criteria and retrieve search results, you can view and maintain information about documents in the search results, along with deleting the document from the system. The search results are for the current version of a document. To access other versions of the document, you can access the Document Management page and review the document history.

**Note:** When you search for Purchasing contracts or purchase order type contract IDs, you can use the % wildcard to find like values. For example, if you enter %50, the system returns results that contain the 50 value.

<b>Field or Control</b>	<b>Description</b>
<b>Source Transaction</b>	Select a source transaction type on which to base the search. You can only search on a single source transaction at a time. Available source transactions are <i>Ad Hoc</i> , <i>Purchase Orders</i> , <i>Purchasing Contracts</i> , and <i>Sourcing Events</i> . After selecting the source transaction, the fields on this page may change so that you can search for the appropriate document.
<b>Contract Style</b>	Select to display documents that match the selected contract style.
<b>Document Type</b>	Select a document type to narrow down the results to only documents that are associated to that document type.
<b>Set ID</b>	Select a SetID on which to base the search.
<b>Business Unit</b>	Select a business unit ID on which to base the search. This field is available when you select a purchase order source transaction.
<b>Ad Hoc ID</b>	Select a specific ad hoc contract ID on which to base the search. This field is available when you are using an ad hoc source transaction.
<b>PO ID (purchase order number)</b>	Select a PO ID on which to base the search. This field is available when you select a purchase order source transaction.
<b>Contract ID</b>	Select a contract on which to base the search. This field is available when you select a purchasing contract source transaction.
<b>Supplier SetID</b>	Select a supplier SetID on which to base the search. This field is available when you select either a purchase order or purchasing contract source transaction.
<b>Supplier ID</b>	Select a SetID on which to base the search. This field is available when you select either a purchase order or purchasing contract source.
<b>All Statuses</b>	Select this check box if you want to search for documents in any status. If you do not select this check box, then you can select individual statuses on which to base your search.

<b>Field or Control</b>	<b>Description</b>
<b>Draft/Collaborated</b>	Select if you want to only include documents in the search results that are in a Draft or Collaborated status.
<b>Pending Approval</b>	Select if you want to only include documents in the search results that are pending approval.
<b>Dispatched</b>	Select if you want to only include documents in the search results that are in a Dispatched status.
<b>Pending Internal Collaboration/Review</b>	Select if you want to only include documents in the search results that are pending internal collaboration or reviews.
<b>Approved</b>	Select if you want to only include documents in the search results that have been approved.
<b>Executed/Complete</b>	Select if you want to only include documents in the search results that are in an Executed or Complete status.
<b>Pending External Collaboration/Review</b>	Select if you want to only include documents in the search results that are in external collaboration statuses.
<b>Denied</b>	Select if you want to only include documents in the search results that have been denied.
<b>Pending Internal Signatures</b>	Select if you want to only include documents in the search results that are pending internal signatures.
<b>Pending External Signatures</b>	Select if you want to only include documents in the search results that are in pending external signatures.
<b>Internal Collaboration Statuses</b>	Select if you want to only include documents in the search results that are in internal collaboration statuses. These statuses include Pending Collaboration, Pending Review, and Collaborated.

### **Additional Search Criteria**

Expand this group box to view and select search criteria that further limit the search results. When you expand the group box, the system also displays the User Defined Field group box if user-defined fields have been selected for use with PeopleSoft Supplier Contract Management.



<b>Field or Control</b>	<b>Description</b>
<b>Awaiting User</b>	Select a user for whom you want to view all documents that are waiting an action by that user such as a check-in, signature, collaboration review, or approval. If you do not select a specific user, the search results will contain documents awaiting all users and that meet other search criteria you enter.
<b>Configurator ID</b>	Select a document configurator on which you want to base this search.
<b>Document State</b>	Select a document state. A state can be active or inactive, and you can include either state in the search or include both states in the search. Inactive documents are those that have been deactivated using the <b>Deactivate</b> button on the Document Management page. The default value for the field is <i>All Active Documents</i> .
<b>Request BU</b> (requisition business unit)	Select the business unit in which you want to search for documents that are tied to a specific Business Unit and Requisition ID combination. The <b>Use with PO Requisition</b> check box must be selected on the Installation Options page to use requisition documents.
<b>Requisition ID</b>	Select a Requisition ID to narrow the search results to only those documents tied to a specific requisition.
<b>From Begin Date</b> and To Begin Date	Select a from and to begin date to establish a begin date range on which to base the document search.
<b>From Expire Date</b> and To Expire Date	Select a from and to expire date to establish an expiry date range on which to base the document search.
<b>From Cycle Start Date</b> and To Cycle Start Date	Select a from and to cycle start date to establish a cycle start date range on which to base the document search. The system searches for documents that have start dates within the date range that you enter.
<b>From Cycle Due Date</b> and To Cycle Due Date	Select a from and to cycle due date to establish a cycle due date range on which to base the document search. The system searches for documents that have due dates within the date range that you enter.

<b>Field or Control</b>	<b>Description</b>
<b>More than X Days in Status</b>	<p>Enter a numeric value that represents the number of days that a document has been in a specific status. This enables you to monitor contracts that may have stalled or might be nearing their due dates, but may not have triggered a caution or warning yet. For example, a sensitive contract document may have been pending collaboration for more than five days, but hasn't triggered a cycle status warning. You might not want to wait before intervening in the collaboration.</p>
<b>Cycle Status</b>	<p>Select a specific cycle status on which to base a search. For example, you can set the cycle status to <i>Red</i> to narrow the search results to only those documents that are in a Red status, meaning they are nearing their estimated target completion date, but are still not completed.</p> <p><i>Green</i>: Indicates that the document or amendment is on schedule.</p> <p><i>Red</i>: Indicates that the document or amendment is close to or past its target cycle-end date and is not yet complete.</p> <p><i>Yellow</i>: Indicates that the document or amendment is nearing its target cycle-end date.</p> <hr/> <p><b>Note:</b> The setup details for determining when the number of cycle days that a document has been in a status is defined using the Cycle Time Settings grid on the Installation Options page. The values in the <b>Red number of days prior to Due Date</b> and <b>Yellow number of days prior to Due Date</b> fields determine the search results.</p> <hr/>
<b>Search</b>	<p>Click to initiate a document search that provides search results at the lower part of the page.</p>
<b>Clear</b>	<p>Click to clear any entered search criteria.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Save Search Criteria</b>	<p>Click this button to save the search criteria that you entered for this page. The system saves the search criteria by user ID, so each user can set up their own default search criteria. You can save search values for a single set of default values that the system will use for all document search pages. Anytime you navigate to this page, the saved criteria will automatically populate the page. The saved data remains the default value until you change the search parameters and save the search criteria again. So, you can change the search criteria multiple times, but until you save the values, the system uses the saved search criteria.</p> <hr/> <p><b>Note:</b> If you are navigating from the Document Management page directly, the system maintains the search criteria and the list of documents that was last used.</p> <hr/>
<b>Delete Saved Criteria</b>	Click to delete any previously saved search criteria if it is no longer needed.
<b>Keyword Search</b>	Click to access the <a href="#">Keyword Search for Documents Page</a> .
<b>Add a Document</b>	Click to access the Add a Document page where you can create a new document.

## User Defined Fields

This group box displays the user-defined fields that have been enabled for Supplier Contract Management and on which you can base a document search. If you select to search using a specific document type, the system displays the subset of user-defined field defined for the document type if the document type is set up to override default user-defined fields.

Values in this box depend on the fields and labels that have been selected for the user-defined fields.

Fields types that might appear include:

- Character

These fields are aligned on the left side of the page with the labels that were assigned to them. Along with a prompt if a prompt table value has been defined for the field. tables so that if they are setup that way, that they are swapped with the prompt table version of the field. The system matches character fields with like values for the value that you enter for the search.

- Date

Search conditions for this field type are date to and from ranges. The name provided for the label appears with the From Date and To Date fields.

- Decimal

Search conditions for this field type include a range of values.

- Integer

The system matches integer fields exactly as you enter them for the search.

## Search Results

Access the Document tab.

<b>Field or Control</b>	<b>Description</b>
<b>Delete</b>	<p>Select to mark this document for removal from the system.</p> <p>When you select the <b>Delete Selected Documents</b> button, the system deletes the selected documents, and they are no longer available for use. You can only delete contract documents that are in a Draft status.</p> <hr/> <p><b>Note:</b> This option is not visible when the <b>Delete Documents</b> option is deselected on the "User Preferences - Supplier Contract Management Page" (Application Fundamentals).</p>
<b>Document Keys</b>	<p>Click the link to access the Document Management page for a contract document, where you can maintain the document. Document keys are based on the source transaction:</p> <ul style="list-style-type: none"> <li>• If the contract document is an ad hoc transaction source, the document key displays the SetID and the contract document description.</li> <li>• If the contract document is a purchase order source transaction, the document key displays the business unit ID along with the purchase order ID.</li> <li>• If the contract document is a purchasing contract source transaction, the document key displays the SetID along with the purchasing contract ID.</li> </ul>
<b>Document Version</b>	<p>Displays the version of the document. To access the document, click the <b>Document Keys</b> link to access the Document Management page where you can view version history.</p> <hr/> <p><b>Note:</b> This document version is not the same as the purchasing contract version that is used to control and maintain contract versions on the Contract Entry page.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Amendment</b>	Displays the number of amendments that have been created for the document.
<b>Document Status</b>	<p>Displays the status of the document. Status values include:</p> <ul style="list-style-type: none"> <li>• <i>Draft</i></li> <li>• <i>Pending Approval</i></li> <li>• <i>Collaborated, Pending Review</i> (internal and external)</li> <li>• <i>Collaborated</i> (internal and external)</li> <li>• <i>Pending Collaboration</i> (internal and external)</li> <li>• <i>Pending Approval</i></li> <li>• <i>Approved</i></li> <li>• <i>Denied</i></li> <li>• <i>Dispatched</i></li> <li>• <i>Executed</i></li> <li>• <i>Completed</i></li> </ul>
<b>Days in Status</b>	Displays the number of days that a document has been at the status that appears in the <b>Document Status</b> field.
<b>Awaiting User</b>	<p>Displays the user ID for the user on which the document is awaiting an action. When the document is not awaiting a specific action, such as collaboration, approval or check-in, the system displays the document owner as the awaiting user, because the owner is ultimately responsible for the document in all other states.</p> <hr/> <p><b>Note:</b> When the <b>Multiple Users</b> link appears as the awaiting user, it indicates that the document is waiting on more than one user. To view all users, click the link. The system displays the Internal Contacts List page or the approval routing that relates to the document status.</p> <hr/>
<b>Checked Out</b>	Displays the value <i>Yes</i> if the document is currently checked out. The user ID who has the document checked out, is displayed in the <b>Awaiting User</b> field.

<b>Field or Control</b>	<b>Description</b>
<b>Cycle Start Date</b>	Displays the date on which the document's cycle started.
<b>Cycle Due Date</b>	Displays the date on which the document should be completed.
<b>Status</b>	<p>Displays the document's cycle status using symbols. The symbols include a:</p> <ul style="list-style-type: none"> <li>• <b>Green check mark:</b> Indicates that the document has completed its cycle based on the values defined at the document type or the installation option level.</li> <li>• <b>Green circle:</b> Indicates that the document is still within the current cycle and is not close to its target due date.</li> <li>• <b>Yellow triangle:</b> Indicates that the document is within the defined yellow days on the corresponding document type from the target due date.</li> <li>• <b>Red square:</b> Indicates that the document is within the defined red days on the corresponding document type from the target due date.</li> </ul>
<b>Delete Selected Documents</b>	<p>Select this button to delete the documents that you have selected in the <b>Delete</b> column. When you delete a document, it is no longer available for use by the system. The deletion process removes the structures and files related to the ad hoc, purchase order, or purchasing contract document. The deletion includes the files stored on the file attachments servers and applicable rows in the database.</p> <p>After you delete documents you might need to rebuild the search indexes, depending on when the indexes were last run. During the next incremental update of the indexes, the deleted documents are removed from the search results.</p> <hr/> <p><b>Note:</b> This button is not visible when the current user does not have <b>Delete Documents</b> authorization, (defined on the "User Preferences - Supplier Contract Management Page" (Application Fundamentals)).</p> <hr/>

## Details

Several fields on the Details tab are the same as those on the Documents tab and in the page search options. For more information, see those field descriptions.

<b>Field or Control</b>	<b>Description</b>
<b>Inactive</b>	Displays as selected when the document has been deactivated using the <b>Deactivate Document</b> button on the Document Management page. You can reactivate the document using the <b>Reactivate Document</b> button on the Document Management page.
<b>Document ID</b>	Displays the system-assigned number for this document. The system assigns these numbers as it creates ad hoc, purchase order, and purchasing contract documents.

## Keyword Search for Documents Page

Use the Keyword Search for Documents Page (CS\_DOC\_FIND\_SES) to search on keywords and other attributes and then review and modify supplier contract documents.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Find an Existing Document** link. Select a source transaction and click the **Keyword Search** link.

This example illustrates the fields and controls on the Keyword Search for Documents page.

**Keyword Search for Documents**

Keyword  [Search Tips](#)

Collection last built on: 2021-03-24-13.37.17.000000

All Statuses

Draft/Collaborated  
 Pending Internal Collaboration/Review  
 Pending External Collaboration/Review

Pending Approval  
 Approved  
 Denied

Dispatched  
 Executed/Complete  
 Pending Internal Signatures  
 Pending External Signatures

**Advanced Search Criteria**

\*Source Transaction

Contract Style

Document Type

\*SetID

Ad Hoc ID

Description

Administrator

Sponsor

Department

[Find an Existing Document](#)

This example illustrates the fields and controls on the Keyword Search for Documents page, Filter by and Search Results sections.

The screenshot shows a web interface with a 'Filter by' sidebar on the left and a 'Search Results' table on the right. The sidebar lists various filter fields such as Contract Style, Created Date, Department, Document Administrator, Document Status, Sponsor, Document Type, Configurator ID, and Document Date, each with a count in parentheses. The search results table has columns for Document Keys, Description, Document Version, Amendment, and Document Status. One result is shown with Document Key 'SHARE / NDA0004', Description 'Eastern Bay NDA', Document Version '0.00', Amendment '0', and Document Status 'Pending Approval'.

Most fields and field definitions are the same as those listed below the [Find an Existing Document Page](#), with the exception of the following:

<b>Field or Control</b>	<b>Description</b>
<b>Keyword</b>	Enter a word, phrase, or partial string in which to perform your search.
<b>Search Tips</b>	Click this link to access a Search Tips window. This window explains how to use phrases, words, and partial strings.
Collection last built on message	This message indicates the last date and time that the indices were built. This date determines the accuracy of the search because some data may have changed since the last time these indices were built. For additional information about building search indexes for Supplier Contract Management see <a href="#">Setting Up and Building Search Indexes</a> .
Status check boxes	When multiple statuses are selected on this page, the system performs 'match any' logic, which means that if <i>Any</i> of the statuses selected are found for a document, then the system displays the document in the results section.

### Advanced Search Criteria

<b>Field or Control</b>	<b>Description</b>
<b>Contract Style</b>	Displays documents that match the selected contract style.

### Filter by

Use the filter by fields to narrow your search results. These fields are defined as facets. For additional information about faceted fields, see "Understanding Search Results " (Application Fundamentals), Search Result Facets.



# Maintaining Authored Documents

## Page Used to Maintain Authored Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Document Management Page</u>	CS_DOC_MAINT	Maintain documents.

## Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to maintain documents.

Navigation:

There are multiple ways to access the Document Management page. Some navigation paths are:

- **Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Find an Existing Document** link for a purchasing contract or ad hoc document on the Add a Document page.
- **Supplier Contracts > Create Contracts and Documents > Contract Entry.** Click the **Maintain Document** button on the Contract page.
- Click the **Maintain Document** button on the Purchase Order page in PeopleSoft Purchasing.
- **Procurement Contracts > Add/Update Contracts,** Select the Find an Existing Value tab and search for an existing contract, click the Maintain Document button.

This example illustrates the fields and controls on the Document Management Page.

**Document Management**

SetID <b>SHARE</b>	Contract ID <b>POC0077</b>	<a href="#">Return to Document Search</a>
Supplier <b>Midton Computer Supplies</b>		
Contract Style <b>Purchase Order</b>		
Document Type <b>Software Contract</b>		
Description <b>Analytics Software</b>		
Administrator <b>Calvin Roth</b>		
Sponsor <b>Calvin Roth</b>	Department <b>13000</b>	<b>Finance</b>

---

Version <b>0.00</b>	Created On <b>03/10/16 2:51PM</b>	<a href="#">Document Details</a>
Status <b>Draft</b>	Last Modified On <b>03/10/16 2:51PM</b>	

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<p><b>View and Edit Options:</b></p> <div style="margin-bottom: 5px;"><input type="button" value="View Document"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Edit Document"/></div> <p><a href="#">Add Attachments/Related Documents</a>  <a href="#">Document Modification Summary</a>  <a href="#">Document Version History</a></p>	<p><b>Review and Approval:</b></p> <div style="margin-bottom: 5px;"><input type="button" value="Route Internally"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Route Externally"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Preview Approval"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Submit for Approval"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Bypass Approvals"/></div> <p><a href="#">Internal Contacts/Signers</a>  <a href="#">External Contacts/Signers</a>  <a href="#">Document View Access</a></p>	<p><b>Other Document Actions:</b></p> <div style="margin-bottom: 5px;"><input type="button" value="Send to Contacts"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Refresh Document"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Recreate Document"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Compare Documents"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Prepare Document for Signing"/></div> <div style="margin-bottom: 5px;"><input type="button" value="Deactivate Document"/></div> <p><a href="#">Generation Log</a></p>
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The Document Management page controls the document authoring system. The actions that you take to manage document life cycles begin here. Depending on the type and status of the document, the system displays different fields and buttons as the document goes through its life cycle.

This topic describes the Document Management page as you use it for purchasing contract and ad hoc documents. Terms that are not defined here are listed in the [Common Elements Used When Managing Document Life Cycles](#) topic. The Life-Cycle Statuses and Actions section also provides more detailed information about this page.

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**Note:** The status of the document, collaboration, and approval determine the actions that you can perform to the document. The action links and buttons on this page will vary. For a complete listing of the links and buttons, see the [Document Actions](#) table.

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These fields and buttons are available:

<b>Field or Control</b>	<b>Description</b>
<b>Return to Document Search</b>	Click to access the Document Search page, where you can search for another document. The search page will be displayed with the last set of search criteria and results shown.
<b>Ad Hoc ID</b>	Displays the ad hoc identifier. The field only appears for ad hoc source transactions.
<b>Contract ID</b>	Displays the identifier for the procurement contract for which you are creating or maintaining documents. The field only appears for purchasing contract source transactions. .
<b>PO ID</b>	Displays the system-defined identifier for the PeopleSoft Purchasing purchase order for which you are creating or maintaining documents. The field only appears for purchase order source transactions.
<b>Contract Style</b>	Displays the contract style that was used to create the document.
<b>Document Type</b>	Displays the document type that was used to create the document. .
<b>BU/Requisition</b> (business unit/requisition)	Click this link to access PeopleSoft Purchasing and PeopleSoft eProcurement requisition pages for this business unit and requisition. This field appears only if the document is tied to a requisition.
<b>Amendment Configurator ID</b>	Displays the amendment configurator ID that was used to create the amendment. The system displays this field when a configurator has been established for an amendment and is defined as a use for amendments-only document. See <a href="#">Creating Document Amendments</a> .

<b>Field or Control</b>	<b>Description</b>
<b>Document Details</b>	Click to access the Document Details page, where you can update the administrator, document type, sponsor, department, document description, and user-defined fields. See <a href="#">Maintaining Document Details</a> .
<b>Description</b>	Displays either a contract description or a user-defined description for the document that is identified in the <b>Document ID</b> field. Use the <b>Document Details</b> link to add or update the description.
<b>Version</b>	Displays the current version of the document. The system automatically updates the version of a document. The system updates versions each time that the document is checked in, refreshed, recreated or amended. You can control whether the system updates the version by selecting the <b>Allow Check in as Same Version</b> check box on the Document Formatting and Options page. When you select the check box, the system provides an additional option for you to indicate that you want to use the same version when you check in the document.
<b>Add Attachments/Related Documents and Modify Attachments/Related Documents</b>	<p>Click to access the Attachments and Related Documents page, where you can add or view existing attachments and related documents, upload additional attachments, and set external or internal use for the attachment. An extra grid appears that displays attachments that were added to Purchasing contracts using the Contract page.</p> <p>Related documents are other document within the document authoring system that you can link to the current document. When you link one document to another document, you can use the <b>Where Used as Related Document</b> link for that document to access the Search for All Content Instances page that provides details about where the document has been added to another document as a related document.</p> <p>See <a href="#">Viewing and Uploading Attachments and Related Documents</a>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Status</b>	<p>Displays the current status of the document. Along with approval and collaboration requirements, the document status can also be determined by the document type. You define the statuses that a specific document type should use. For example, you can reduce the number of statuses that a document goes through by selecting values that use only two statuses for a document as it goes through its life cycle. Newly generated documents start with a status of <i>Draft</i>.</p> <p>If document approvals are not required, the <i>Pending Approval</i> status is not applicable.</p> <p>Displays the current document status. Values can be:</p> <ul style="list-style-type: none"> <li>• <i>Draft</i>: - The document has been generated and is in an initial Draft status. The system displays the latest version of the draft.</li> <li>• <i>In Collab</i> (pending collaboration): - The document has been routed for collaboration, but all collaborators have not responded.</li> <li>• <i>Collabed</i> (collaborated): - The document has been reviewed by all collaborators and the document administrator or owner has reviewed and updated the document based on collaborator reviews.</li> <li>• <i>Pending</i> (pending approval): - The document has been routed using workflow approval.</li> <li>• <i>Approved</i>: - The current document has been approved internally and is available for supplier dispatch for final signatures and execution.</li> <li>• <i>Denied</i>: - The current document has been denied internally.</li> <li>• <i>Dispatched</i>: - The current documents have been dispatched to the supplier and are waiting for final signatures.</li> <li>• <i>Executed</i>: - The current document has been executed.</li> </ul> <p>The system preserves the executed version and enables the contract for amendments. When an amendment is first initiated, the authored status cycles begins again starting with <i>Draft</i> and the amendment number is shown. Previous versions, including current executed contract, can be viewed by clicking the <b>Maintain Document</b> button.</p> <ul style="list-style-type: none"> <li>• <i>Pending Review</i> (collaborated, pending review): - The document has been reviewed by all collaborators and is awaiting a final review by the document administrator or owner.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
	<p><b>Note:</b> The authored status and contract status are independent of each other because the timing of changing a contract and the document life cycle are different. The system does not update the authored status on the Contract Entry - Contract page until the page is closed and reopened.</p>
<b>View Document</b>	<p>Click to open a document or amendment as read-only in Microsoft Word. This action does not check out the document, but rather enables collaborators, approvers, and reviewers who have view-only authority to review or collaborate on the document. After reviewing the document, these individuals can include their comments through the collaboration or approval process.</p> <p><b>Note:</b> The system restricts view-only access for a specific document to the document administrators and users who are defined as internal contacts or collaborators for this specific document. To add interested parties who can view the document at any time, add them to the collaborator list for the document.</p> <p><b>Note:</b> You can view a variety of documents. The type of document is described by the button name. For more information about the individual buttons, see the <a href="#">Document Actions</a> table.</p>
<b>Edit Document</b>	<p>Click to check out a document or amendment and edit it using Microsoft Word. The buttons are available if a document is not checked out. Upon check out, the system records the date and time and who checked out the document, and locks it to prevent another user from accessing it or updating any statuses. Collaborators and approvers who have edit authority can open the document and enter their edits in the Microsoft Word version of the document.</p> <p><b>Note:</b> The system restricts the editing of specific documents and amendments to users with document administrator authority and those users who are defined as collaborators with edit authority. You define these settings through user preferences or on the External Collaborators page. See <a href="#">Viewing and Editing Documents</a>.</p> <p><b>Note:</b> For more information about the individual buttons, see the <a href="#">Document Actions</a> table. This is an alphabetic display of all buttons and actions available on the Document Management page.</p>
<b>Document Version History</b>	<p>Click to access the Document History page, where you view a complete history of actions taken with the document, including status changes, check-out history, and previous versions of the document. This page provides the complete audit trail of the document. See <a href="#">Document History Page</a>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Route Internally</b>	Click to access the Internal Contacts/Collaborators page, where you can review and update collaborator information, provide collaboration instructions, and route the document for collaboration and approval. See <a href="#">Collaborating on Documents</a> .
<b>Preview Approval</b>	Click to access the Document Approval Status page, where you can preview the stages, paths, approvers, and reviewers who plan for the document. The page displays this button only if you have enabled installation options for document approvals. See <a href="#">Document Approval Status Page</a> .
<b>Submit for Approval</b>	<p>Click to submit the document for approval. The page displays this button only if you have enabled installation options for document approvals. When you submit a document for approval, and approvals are not required, the Document Approval Status page displays a message that approvals are not required. In this case, if you click the <b>Submit for Approval</b> button, the system sets the contract status to <i>Approved</i>.</p> <p>If approvals are required and you submit the document for approval, the system displays the Document Status Approval page, where you can review and edit who is going to approve the document. See <a href="#">Submitting Documents for Approval Using the Document Approval Status Page</a>.</p>
<b>Bypass Approvals</b>	<p>Click to bypass approvals. This means that as a document administrator, you can select to approve the document immediately. When you click this button, the system sets the approval status to Approved and does not route the document for approval.</p> <hr/> <p><b>Note:</b> To authorize an administrator to bypass approvals, you must select the <b>Bypass Approvals</b> check box for the user on the "User Preferences - Supplier Contract Management Page" (Application Fundamentals).</p> <hr/>
<b>Internal Contacts/Signers</b>	Click to access the Internal Contacts/Collaborators page, where you can review and update contacts and collaborators for this document. Along with providing details about collaborator authorities, you can also provide instructions and comments about the collaboration process and route the document for collaboration. See <a href="#">Internal Contacts/Collaborators Page</a> .
<b>External Contacts/Signers</b>	Click to access the External Contacts page, where you can add or update information about external contacts. This information includes the contact's name, title, email, phone, and address. The system uses this information when you click the <b>Send to Contacts</b> or <b>Dispatch</b> button. Contacts that you define here are default values for sending documents to contacts and for dispatching documents. See <a href="#">Setting Up Default Document Preferences</a> .

<b>Field or Control</b>	<b>Description</b>
<b>Document Modifications Summary</b>	<p>Click to access the Document Modification Summary page, where you can review the plain text version of certain document content, such as clause information that has been changed, added, or deleted from the document. The system tracks this information each time you check in a document. The summary represents deviations from the original document or last executed document.</p> <p>Tracking this information enables approvers in the document approval process to better track document changes. The system processes specific clause changes when the text in hidden clause tags in the document is modified so that it differs from the clause that was originally included in the document. The system does not track formatting changes, such as using different font sizes or changing text to bold.</p> <hr/> <p><b>Note:</b> By using the Microsoft Word - Change Tracking feature, you can track specific user-detailed changes to the contract for each version of the stored contract. If you add text to the document outside of the clause tags, the system tracks the information as an add, but does not associate the new text with a clause ID.</p> <hr/> <p>See <a href="#">Viewing Document Modification Summaries</a>.</p>
<b>Document View Access</b>	<p>Click to provide viewing permissions for users and to review collaborators who have view permissions for this document. You assign user permissions based on the user's role. See <a href="#">Granting Document View Access</a>.</p>
<b>Send to Contacts</b>	<p>Click to send the current version of this document and related attachments to internal and external contacts. Contacts can review the document and edit it if they have the authority. When you click the button, the system displays the Send to Contacts page, where you can review and update information about contacts. This button also supports sending document amendments. See <a href="#">Sending Documents to Internal and External Contacts</a>.</p>
<b>Edit Recipients</b>	<p>Click to access the <a href="#">Edit Recipients Page</a> and modify recipient information after a document has been submitted for signatures.</p> <p>You can change the name or email address of a recipient, add or delete a signer, or change signing order.</p> <p>This button is available only when the document has been submitted to DocuSign and the signing status is still pending.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Refresh Document</b>	Click to access the Refresh Document Options page, where you can define document versions for the refresh. You use this option when you want to update the document with only changes to binds and rules. The content structure can also change based on evaluation of rules. See <a href="#">Refresh Document Options Page</a> and <a href="#">Refreshing Microsoft Word Documents</a> .
<b>Recreate Document</b>	Click to access the Recreate Document page, where you can completely rebuild a document. This means that the system starts from the beginning and uses the most current contents based on the specified configurator. You can use a different configurator to re-create a document. See <a href="#">Recreate Document Options Page</a> and <a href="#">Generating Microsoft Word Documents</a> .
<b>Attach to Requisition</b>	Click to attach the document along with any comments you enter back to the purchase order requisition under the header comments. You can attach only one version of a document to a requisition at any one time. See <a href="#">Add a Document Page</a> and <a href="#">Understanding How to Create Authored Documents from Requisition Wizards</a> .
<b>Compare Documents</b>	Click to access the Compare Documents page. You use this option to compare differences between the current version of the document and a re-created or refreshed version of the current document. This feature can be useful to perform what-if scenarios to identify any differences between a re-created or refreshed copy of the document and the current document. This feature uses the Microsoft Word - Compare Documents function, which requires special setup before you can use it. See <a href="#">Setting Up Document Comparison and Rendering</a> .
<b>Route for Signature</b>	Click to access the Prepare Document for Signatures page and specify document recipients and send documents for signing.  <b>Note:</b> This button appears for the Adobe and Word digital signature methods only.



<b>Field or Control</b>	<b>Description</b>
<b>Prepare Document for Signing</b>	<p>Click this button to access the Prepare Document for Signature page, where you can verify that the list of signers is accurate and add those who need to sign the document. Internal signers must be in the list so that they have access to the document and that the system provides them the appropriate tasks on the Document Management page.</p> <p>This action converts (creates a copy) the document to the appropriate signature method defined on the Installation Options - Supplier Contract Management page. After preparing the document for signatures, you cannot make additional changes to the editable version of the document. You use the Internal Contacts List and External Contacts List links to establish document signers.</p> <p>Showing this button on the Document Management page also depends on the document type settings. When internal signatures have been enabled, you can define when a document should be ready for signing, such as prior to, during, or after approvals. This button appears only for the Adobe and Word digital signature methods.</p> <hr/> <p><b>Note:</b> The list of signers in an internal contact and external contact list act independently of actual signature fields defined within the document when the document is prepared. Depending on your needs and signing scenarios, you can establish one or more signature clauses and include them in an authored Microsoft Word document prior to preparing the document for signing. In more complex scenarios, you can use rules to drive which signature clauses are included during document authoring, or refresh tasks based on the signature list that you define for each document or based on wizard questions.</p>
<b>Prepare and Route for e-Signature</b>	<p>Click to access the <b>Send Document for Signing</b> page and specify document recipients, verify identity, and send documents for signing.</p> <hr/> <p><b>Note:</b> This button appears only if the user is authorized to send document to Adobe Sign for signing.</p>
<b>Cancel Signature Process</b>	Click to cancel the signature process.
<b>Deactivate Document</b>	Click to remove a document from use. The document's status remains the same. Deactivated documents are not available for selection. When you click the <b>Deactivate</b> button, the page displays a deactivate message and enables the <b>Reactivate</b> button. See <a href="#">Deactivating and Reactivating Documents</a> .

<b>Field or Control</b>	<b>Description</b>
<b>Reactivate Document</b>	Click to activate a deactivated document. This action makes the document available for use. When you click the <b>Reactivate</b> button, the page displays the document at the same status it was when it was deactivated and enables the appropriate buttons. See <a href="#">Deactivating and Reactivating Documents</a> .
<b>Where Used as Related Document</b>	Click to access the Search for All Content Instances page, which provides details about where this document has been added to another document as a related document. This link appears for a document that has been used as a related document. The search provides links to the documents to which this document has added as a related document. See <a href="#">Performing Where-Used Searches</a> .
<b>Generation Log</b>	<p>Click to access the Generation Log page, where you can review warnings, wizard information, and configurator expansion information that the system gathers during the generation or re-creation of the document. Information in the log depends on the value for the <b>Log at Document Generation</b> field on the Document Configurator Definition page. You can select to track generation warnings and wizard values only, or you can select to track extended details for the generation process.</p> <p>A typical error that the system records might be a result of bind variables that were not found in the document. Detail log generation includes extended details about the history of wizard responses, bind variable resolutions, rule resolutions, copying documents, and details on expansion of the configurator. This information is useful when you are implementing a new document configurator or for auditing purposes. See <a href="#">Viewing Document Generation Logs</a>.</p>

## Signing Details

Use this section to track the status of pending signatures. This section appears only after a document has been submitted for signing.

Document Management page - Signing Details section

▼ Signing Details

Signature Status Pending Signatures

03/14/2016 03:53 PM Created - The envelope was created by Rachel Kruzner

03/14/2016 03:53 PM Sent - Rachel Kruzner sent an invitation to Mei Ling [lam\_rachel@yahoo.com]

Get e-Signature Status

Signers	Find	First	
Email	User Name	Sign Status	Signed DTTM
1 lam_rachel@yahoo.com	Mei Ling	Pending Signature	

<i>Field or Control</i>	<i>Description</i>
<b>Get e-Signature Status</b>	Click to track the status of pending signatures.  When clicked, the page displays the signature status and associated signer information.

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## Refreshing and Re-creating Documents

### Pages Used to Refresh and Re-create Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Refresh Document Options Pages</u>	CS_DOC_VERSIONS_SP	Refresh documents.
<u>Recreate Document Options Page</u>	CS_DOC_VERSIONS_SP	Re-create documents.

### Understanding Document Refresh and Re-creation

Refreshing and re-creating documents enables you to update or re-create a document based on changes that might have occurred in related bind values or the contract library. You use the **Refresh** button to update the document based on changes to wizard or transactional binds.

Use the **Refresh** button when you want the content from the current generated version of the document to remain the same, but need to update changed bind variables, or wizard variables with their new values. If repeat or rule binds do not change, the resulting contract should remain the same as the prior version, with the exception of the bind value changes. However, if a repeating or rule bind variable changes, the entire section that contains that variable will be rebuilt.

You use the **Recreate Document** button to completely re-create the document. Re-creation is the same as creating a new document. Using re-creation, you can also change configurators to rebuild the document. For example, during contract negotiations, numerous changes might have been made to the original document. The contract team determines that the original document better suited the contract needs, so they re-create the document based on the original configurator to re-create the document.

---

**Warning!** When you re-create a document, the system creates a new document using the latest transaction or wizard. Any changes that have been made to the document will be lost

---

Version numbering options for refreshed or re-created documents include keeping the same version, changing a minor version number, or changing a major version number. You can use the same version feature only if you have set up document options to enable the feature. To enable the feature, select **Supplier Contract Management > Supplier Contracts Setup > Document Format and Options**.

#### Related Links

[Generating Microsoft Word Documents](#)

Refreshing Microsoft Word Documents

## Refresh Document Options Page

Use the Refresh Document Options page (CS\_DOC\_VERSIONS\_SP) to refresh documents.

Navigation:

**Supplier Contracts >Create Contracts and Documents > Document Management.** Click the **Refresh Document** button on the Document Management page.

Use this page to indicate what version to use for the newly refreshed document. The system checks for binds in the document to determine what has changed. For example, a bind variable value may change in the wizard or the purchasing contract transaction. The Refresh function evaluates changes in the content based on changes in the variables. In addition, depending on the installation options defined, the system can automatically update any version or amendment bind variables with the new values.

Click the **OK** button to continue with the refresh. Click the **Cancel** button to return to the Document Management page without refreshing the document.

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**Note:** The Refresh Document Options page changes based on the document's life-cycle status. When you are creating an amendment, the system includes the **Amendment Options, Refresh Main Contract File, Refresh Amendment File, and Amendment Configurator ID** fields on this page.

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<i>Field or Control</i>	<i>Description</i>
<b>Amendment Option</b>	<p>Displays the option that the system used to create the amendment. The system displays this field only when the current document is in an amendment cycle. The following list describes how the system processes an amendment:</p> <ul style="list-style-type: none"> <li>• When the amendment option is <b>Amend Contract Only</b>, the Refresh process updates the latest version of the amended document similar to how it refreshes an original document.</li> <li>• When you are refreshing with the <b>Amend Contract with Amendment Files</b> option, a slight difference exists in that you have the choice of refreshing either the current main amended document, the amendment file, or both files.</li> <li>• If the amendment option is <b>Amendment Files Only</b>, the refresh always applies only to the amendment file itself. In this case, the main document is never updated.</li> </ul>
<b>Same Version</b>	<p>Select to keep the same version of the document when you refresh or re-create a document. This overwrites older versions of the document with the same version number. Unlike the minor and major versions, the version that appears with this field is the current version. If you select this check box, the system uses this version after the refresh or re-creation process. This check box is available only if you enable the feature on the Document Format and Options page.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Minor Version</b>	<p>Select to use the minor version that appears in this field as the next version of the document after you refresh or re-create it.</p> <p>The difference between a minor and major update depends on organizational standards for version control. The system increments minor versions using decimals. For example, if the current version is 2.02, the next incremental minor version becomes 2.03. When re-creating or refreshing amendments, the system also updates the version number.</p>
<b>Major Version</b>	<p>Select to use the major version that appears in this field as the next version of the document after you refresh or re-create it.</p> <p>The system increments major versions by one. Therefore, if the current version is 2.02 and you use the next incremental major version, the new version becomes 3.00. The system increments the minor version updates as 3.01, 3.02, and so on.</p> <p>When re-creating or refreshing amendments, the system also updates the version number.</p>
<b>Refresh Main Contract File</b>	<p>This check box appears only when you use the <i>Amend Contract with Amendment Files</i> amendment option. When the current document is in an amendment cycle, you can select to refresh the current version of the main amended contract in the system. This could be in addition to refreshing the separate amendment file that is paired with the main amended contract.</p> <p>An example might be if you have wizard bind values that extend the warranty period of a contract and those values have changed. And, suppose that you are using the <i>Amend Contract with Amendment Files</i> amendment option to track the change with the amended contract and in the separate amendment file. Then, refreshing the main contract file in this case updates the current main amended contract file with the new warranty value.</p> <p>When you refresh the document, you also can update wizard questions and answers.</p>
<b>Refresh Amendment File</b>	<p>Select to refresh only the amendment file that is attached to the main document. This option applies only when the amendment option is <i>Amend Contract with Amendment Files</i> and the current document is in an amendment cycle.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Update Amendment File</b>	<p>Select to update the amendment file automatically with compared adds, changes, and deleted text that you have made to the main amended contract document. When selecting this check box, a server-side compare is performed between the last executed main contract document and the latest version that has been checked in. Those changes are inserted into the location in the separate amendment document based on the location of the amendment placeholder section in the amendment configurator.</p> <p>This option enables you to edit only the main contract and have the comparison performed for you to extract changes to the separate amendment file as a starting point for edits within the separate amendment file. This option applies only when the amendment option is <i>Amend Contract with Amendment Files</i> and the current document is in an amendment cycle and the amendment file's configurator ID has an amendment placeholder section defined within the structure.</p>
<b>Comments</b>	<p>Enter any comments that you have about the purpose of the refresh. These comments appear in the document's version history on the Comments tab.</p>

**Related Links**

[Creating Document Amendments](#)

[Refreshing Microsoft Word Documents](#)

**Recreate Document Options Page**

Use the Recreate Document Options page (CS\_DOC\_VERSIONS\_SP) to re-create documents.

Navigation:

**Supplier Contracts >Create Contracts and Documents > Document Management.** Click the **Recreate Document** button on the Document Management page.

Use this page to update configurators and versions, define which contract elements to re-create, and make comments about the re-creation of the document. The Recreate Document Options page is similar to the Refresh Document Options page, except that you can apply different document types and configurators to re-create the new document, and the document is rebuilt, not updated. Also, depending on the installation options defined, the system can automatically update any version or amendment bind variables with the new values.

---

**Note:** The Recreate Document Options page changes based on the document's life-cycle status. When you are creating an amendment, the system includes the **Amendment Options, Refresh Main Contract File, Refresh Amendment File, and Amendment Configurator ID** fields on this page. See [Creating Document Amendments](#).

---

Click the **OK** button to continue with the re-creation. Click the **Cancel** button to return to the Document Management page without re-creating the document.

<b>Field or Control</b>	<b>Description</b>
<b>Document Type</b>	<p>Select a document type to use when re-creating the document. Document types are available for use only if selected on the Installation Options page.</p> <p>The field appears with the document type value that was used to initially create the document. You can change the type, but if the document was created using a document type, you cannot clear the field.</p>
<b>Configurator ID</b>	<p>Select the document configurator to rebuild this document. The default value for the field is the configurator the system that was used to create the document or the configurator that was used the last time that the document was re-created. Because you are building the document from the start, the system generates a version of the document based on the configurator ID that you enter and the original date of the document.</p> <p>The system low-lights the field when document types are enabled and the user does not have override capability as specified on the document type. .</p>
<b>Configurator Selector</b>	<p>Click to run the configurator selector wizard. The system makes the button available when you select a document type that uses a wizard to select the configurator ID.</p>
<b>Amendment Configurator ID</b>	<p>Select the document configurator to rebuild contract amendments that are associated with the document. This field is available when the current document is in an amendment cycle and a separate amendment file is being used. This occurs when you select either the <i>Amend Contract with Amendments</i> or the <i>Amendment Files Only</i> amendment process options.</p>
<b>Recreate Main Contract File</b>	<p>This check box applies only when the amendment process option is <i>Amend Contract with Amendment Files</i>. When the current document is in an amendment cycle, you can select to re-create the current version of the main amended contract in the system. For example, this could be in addition to re-creating the separate amendment file that is paired with the main amended contract.</p> <hr/> <p><b>Warning!</b> If the last executed main contract file contains any manual edits, you should not select this option. It causes the newly generated main document file to lose any prior executed changes. The system default value for the check box is deselected.</p> <hr/>
<b>Recreate Amendment File</b>	<p>Select to re-create only the amendment file that is attached to the main document. This option applies only when the amendment process option is <i>Amend Contract with Amendment Files</i> and the current document is in an amendment cycle.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Update Amendment File</b>	<p>Select to update the amendment file automatically with compared adds, changes, and deleted text that you have made to the main amended contract document. When selecting this check box, a server-side compare is performed between the last executed main contract document and the latest version that has been checked in. Those changes are inserted into the location in the separate amendment document based on the location of the amendment placeholder section in the amendment configurator.</p> <p>This option enables you to edit only the main contract and have the comparison performed for you to extract changes to the separate amendment file as a starting point for edits within the separate amendment file. This option applies only when the amendment option is <i>Amend Contract with Amendment Files</i> and the current document is in an amendment cycle and the amendment file's configurator ID has an amendment placeholder section defined within the structure.</p>

**Related Links**

[Creating Document Amendments](#)

[Generating Microsoft Word Documents](#)

## Maintaining Document Details

### Page Used to Maintain Document Details

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Document Details Page</a>	CS_DOC_CHANGE_SP	Maintain document details.

### Document Details Page

Use the Document Details page (CS\_DOC\_CHANGE\_SP) to maintain document details.

Navigation:

**Supplier Contracts > Create Contracts > Document Management.** Click the **Document Details** link on the Document Management page.

Document detail attributes provide additional details about a document that you can maintain. For example, the document sponsor and department represent the sponsoring user and organization for the document. You can also maintain the begin and expiration dates on this page for ad hoc contracts.

If you are using document types and want to change the type, it must match the current configurator ID. If you want to use a different configurator ID, you must re-create the document.



When the source transaction is for Purchasing Contracts, the contract style is disabled. For Purchasing Contracts, the contract style must be changed on the contract itself and the change will be reflected in Document Management.

For contracts that are related to purchasing, the **Begin Date** and **Expire Date** fields do not appear because the purchasing contract or purchase order contact already contains a begin and expiration date. The attribute details on the Document Management page always represent the current attributes for the ad hoc, purchasing contract, or purchase order document. Purchasing and purchase order contracts supplement other page values that are associated with the transactional contract itself. You can reference attributes as bind variables in documents, and you can perform searches based on document detail attributes.

For Ad Hoc documents a supplier field appears on the page and can be used to link the document to any active supplier. This may be useful for documents that were created as part of the supplier onboarding process and now have an existing supplier record.

You can also use this page to view and update corresponding user-defined fields associated to the document. In addition, if you are an authorized specialist, depending on the settings on the User Preferences page, you can change the cycle start and due dates. The page also provides history related to when the document was created, collaborated, approved, executed, and dispatched. The system updates information on this page as the document goes through its life cycle.

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## Creating Executive Summaries

### Pages Used to Create Executive Summaries

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Executive Summary Page</a>	CS_DOC_EX_SUMM	Create an executive summary.
Create Executive Summary Page	CS_DOC_ACTIONS_SP	Enter comments for an executive summary.

### Understanding Executive Summaries

Executive summaries provide a way to generate a single, secondary-summary document along with the authored document for the purpose of initial contract executive review. You can build an executive summary document to go along with the regular contract document. The executive summary document uses its own separate configurator that you maintain similar to the main document configurator, and in which you can include wizard and transactional responses used in the main contract creation to populate executive summary documents. The executive summary document can be edited separately from the main contract document and can be re-created or refreshed similar to the main document.

---

**Note:** The system does not log executive summary version history.

---

To prepare to use executive summaries:

1. Create a document configurator for use with executive summaries.

Select the **Use for Executive Summary** check box on the Document Configurator Definition page.

2. Assign an executive summary configurator to a document type.

When you create a document type, the system provides the configurators available for use with executive summaries. Use the Life Cycle Options grid on the Document Type page to select an executive summary configurator. When you create a document that also includes an executive summary configurator, the system displays the **Create Executive Summary** button on the Document Management page.

## Executive Summary Page

Use the Executive Summary page (CS\_DOC\_EX\_SUMM) to create an executive summary.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Create Executive Summary** button on the Document Management page.

Use this page to create and update a corresponding executive summary document. To create an executive summary:

1. Click the **Create Executive Summary** button on the Document Management page.

The system displays the Executive Summary page where you can select which executive summary to use.

2. Click the **Create Executive Summary** button.

The system displays a comments page where you can enter comments about the summary.

3. Click **OK**.

The system creates the summary and returns to the Document Management page where the **Maintain Executive Summary** page is now available.

After creating the summary, use the Document Management page to click the **Maintain Executive Summary** button and access the Executive Summary page. You use this page to view, update, re-create, or refresh the separate executive document as you would with the regular contract documents. The system allows only one current executive summary per document because it doesn't support individual version control as it does with the main contract document.

You can update the executive summary document on the Executive Summary page by clicking on the Edit Document button, updating the document, and then clicking the Check In Document button to replace the existing version of the summary.

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**Note:** While the system does not track version history, changes to executive summary documents are provided in the document history.

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## Viewing and Editing Documents

### Pages Used to View and Edit Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Editing Documents from the Document Management Page</a>	CS_DOC_MAINT	Edit and view documents, and cancel document checkout. See <a href="#">Editing Documents from the Document Management Page</a> , <a href="#">Viewing Documents from the Document Management Page</a> , and <a href="#">Canceling Document Checkout from the Document Management Page</a> .
List of People to Notify Page	CS_DOC_NOTIFY_SP	Define users who should be notified when a document that is checked out is checked in. When you enter an user's e-mail address, the system inserts a date and time stamp for when the user was defined. You can select which template to use with the notification by selecting a value in the <b>Notify When Available Template</b> field on the <a href="#">Installation Options - Supplier Contract Management Page</a> .
<a href="#">Check In Document Page</a>	CS_DOC_VERSIONS_SP	Check in documents.

### Understanding Document Edits

You can edit documents using Microsoft Word by checking out the document and downloading it to the local system, where you can work with the document offline. To use Microsoft Word, you must configure it for use with the PeopleSoft system.

PeopleSoft Supplier Contract Management and Microsoft Word use Microsoft Office Open XML to describe the structure of the document. The system represents content, such as clauses, sections, and bind variables, with text that is surrounded by specialized strings of text called tags. For example, a bind variable called Company could be represented in XML with the starting tag *bindval*, followed by Company and the name of the bind variable, and ending with another tag. The system processes clauses in a similar manner using a *contract\_obj* XML tag.

See [Understanding Microsoft Word Integration with Supplier Contract Management](#).

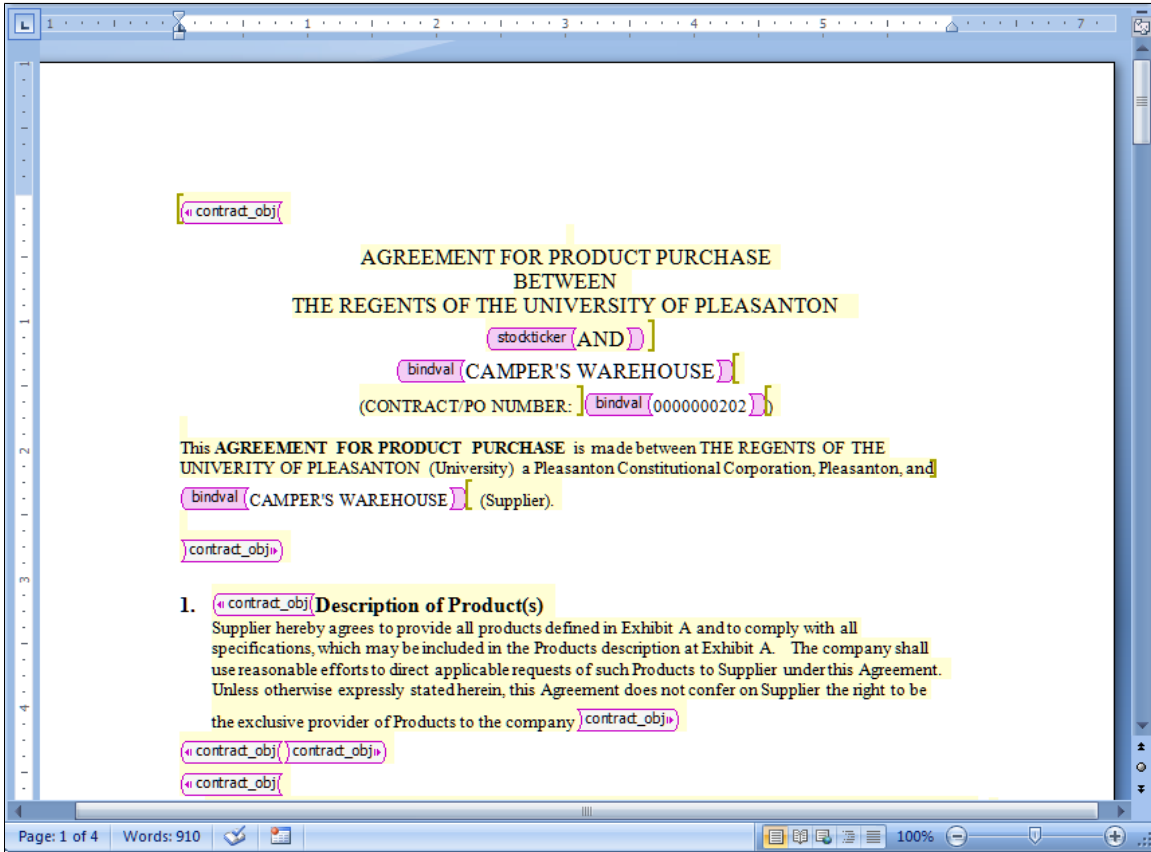
During editing and check-in, the content control tags enable the system and Microsoft Word to communicate properly. Because the XML tag structure defines the structure, Microsoft Word provides the capability to protect the XML tags that the PeopleSoft system uses to prevent damage to the tag structure. If you alter or delete the tags in Microsoft Word, you risk losing the mapping between the two applications.

You can use installation options to indicate how the system processes a document when you check out the document for editing. You can set the document to automatically open with track changes enabled and

protect bind values in the document. If you do not set installation options to automatically track changes in a document, you can manually select to track changes while you are in the Microsoft Word document.

This example illustrates how a Microsoft Word document might appear when you open it for editing and the XML tags appear:

This example illustrates the fields and controls on the Example of Microsoft Word document and XML tags when you open the document for editing. You can find definitions for the fields and controls later on this page.



As you check out, edit, and check in documents, you should be aware of several considerations and conditions as you process the document. Many of these are described in the [Understanding Microsoft Word Integration with Supplier Contract Management](#) topic.

See Also: [Setting Up PeopleSoft Integration Broker for Microsoft Word](#), [Editing Clause Text](#), and [Setting Up Installation Options for PeopleSoft Supplier Contract Management](#).

### Document Checkout

You check out a document when you use the **Edit Document** button on the Document Management page to either review or update the document. When you check out a document, it remains available for viewing, but the system prevents other users from editing it. You can also cancel the checkout.

When you check out a document, the system creates a single file and opens the document in Microsoft Word. The system can also automatically download multiple files when you check out files for editing during amendment processing. If you are comparing documents or opening an amended document using Amend Contracts with Amendments as the amendment process option, the system sends the amendment

along with the original document when you select to edit the files. It also provides instructions for multiple file check-in sequences.

The system provides a **Notify Me** button when a document is checked out by another user. Click the button to add user email addresses for those who the system should notify when the document is checked back into the PeopleSoft system. This enables you to be notified as soon as the document is checked in.

The system uses a Notify When Available template for sending notifications to users who you define for notification. To update the template, use the **Notify When Available Template** field on the Installation Options page.

## Document Check In

Use the **Check In** button to upload the document file back in to the PeopleSoft system. After you check in the document, the **Check In** button is no longer available. The button also is not available when the document is checked out and you are not the user who checked out the document.

After you finish editing the Microsoft Word document, you must save the document as an .xml document type. When you click the **Check In** button, the system prompts you for information to upload the file. Locate and upload the file from the client machine. If all validations pass, the system updates the version of the document with any document changes as part of the check-in process. The document also is available for workflow processing.

If you are checking in an amended contract using two-file amendment processing, where you are maintaining amended changes in both the main contract and separate amendment file, and the amendment configurator has specified an amendment placeholder section in it, an additional check box appears that enables you to automatically update the amendment file.

This feature enables you to use the two-file amendment functionality, but begin by making amendment changes only to the main contract to the point that all main changes are complete. You can select this check box on final check in or during a refresh as an alternative, which initiates server-side processing to:

1. Compare the last executed document with the current main contract.
2. Extract those changes.
3. Place the changes in a separate amendment file as a starting point for authoring a separate amendment file.

In cases where you have setup the system and configurator to use amendment placeholder sections, the system first displays edit buttons for separate amendment file editing only after you select the **Update Amendment File** option at least once.

---

**Note:** The check-in and uploading of the document does not delete the local files from the client machine. You should delete these files periodically.

---

When you check in a document, the system:

- Parses the Microsoft Word file and saves the plain text of the document.

The system uses the plain-text version of the document for index searches and for indicating clause additions, changes, and deletions if you use clause approvals during document approvals.

- Validates that the .xml file is a Microsoft Word document file.

If you are attempting to check in a file that is not a Microsoft Word XML document file, the system displays an error message and ends the check-in process.

- Validates that the file you are checking in is linked to the correct contract ID if the document is a purchasing contract type document.

If the document belongs to a different contract, the system displays an error message that indicates that the contract you are checking in does not match the contract that appears on the Document Management page. You cannot continue until you select the correct file to upload. For ad hoc documents, the system does a similar check using the ad hoc document ID.

- Updates any bind variable values that exist in the document version, or amendment, to match the current version and amendment numbers.

The system processing depends on the setting on the Installation Options page. If the **Update Version and Amendment Binds** check box is selected, the system makes the update.

- Issues a warning if a new bind variable has been added during editing.

The system also suggests whether a refresh is necessary to resolve the value of the bind variable. In this case, after checking in the document, you must click the **Refresh Document** button on the Document Management page to update the document to include the new transactional values.

## Relaxed Check In

There may be situations when documents are modified by users or processes (especially outside your organization) that can cause the loss of important xml tagging, document key fields, and attributes within the document. These xml tags are used when checking documents back into the system, and when performing other actions after check-in such as refresh or deviation reporting.

If important tagging information is missing from the document the system provides warnings, and in some cases allows the check-in to occur based on your response to the message. In this case, you are warned that relaxed check-in is available, but features, such as refresh, compare with refresh, or object deviation reports no longer work for the document. You are given the option to continue with relaxed check in, or you can cancel the check in process.

The system allows for this relaxed-type of check-in so that the business process can continue for the contract rather rejecting the checking.

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**Important!** You should carefully consider the practice of checking in documents that are missing the xml tagging information and loss of functionality for those documents before doing so on a regular basis.

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## Related Links

[Refreshing and Re-creating Documents](#)

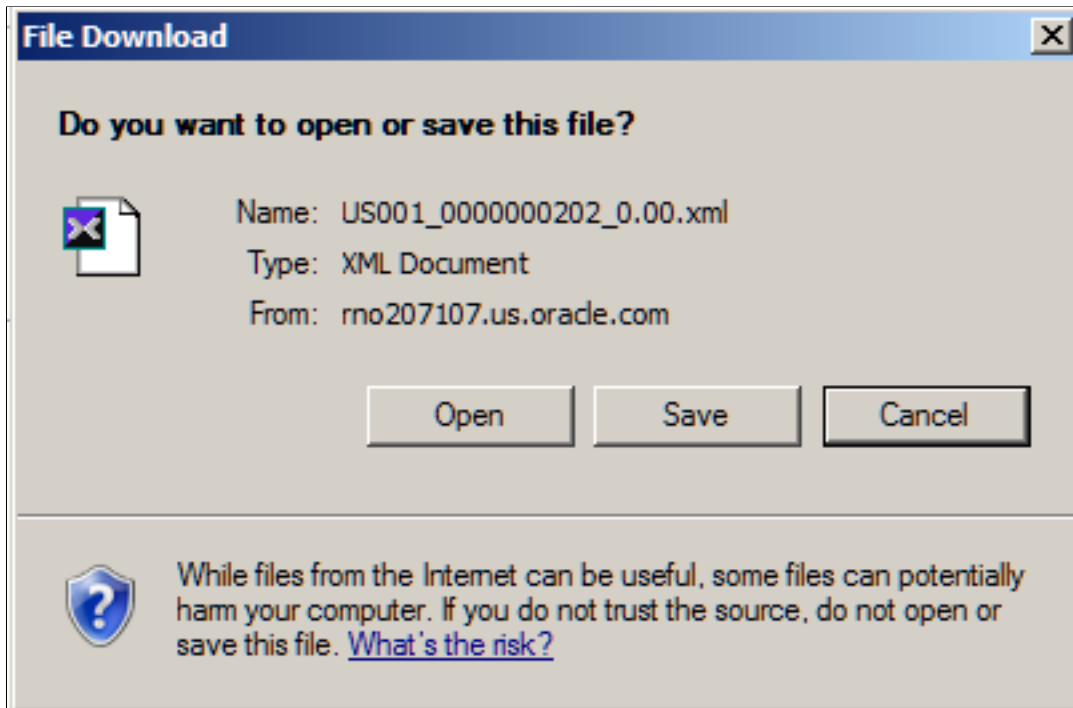
## Editing Documents from the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to edit documents, view documents, and cancel document checkout.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Edit Document** button. The File Download page appears:

This example illustrates the fields and controls on the File Download page. .



When you edit a document, the system places it on your local computer in a directory that you specify. The file remains in the directory even after it is checked in. You can cancel the checkout.

When you check out a document for editing, the buttons for other document actions are hidden. The system also updates information about the document, such as to whom the document is checked out and when it was checked out. When the file is checked in, the system displays the last modified date.

The page appears with several options for processing the file.

---

**Note:** If you are editing an amended document or comparing documents, the system displays this page for each document.

---

See [Amendment Processing](#).

<b>Field or Control</b>	<b>Description</b>
<b>Open</b>	<p>Select to open the file for immediate review. This enables you to view and edit the content of the file. You must save the file to a directory after you open it in order to check changes back in.</p> <hr/> <p><b>Note:</b> Opening Microsoft Word files directly using the browser might invoke a Microsoft Word browser plug-in. While this supports various versions of Microsoft Word, you should configure client machines to open Microsoft Word directly on the desktop. See the Microsoft web page for more information.</p> <hr/> <p>See <a href="#">Understanding Microsoft Word Integration with Supplier Contract Management</a>.</p>
<b>Save</b>	<p>Select to save the file in a directory on the local computer.</p> <hr/> <p><b>Note:</b> Make sure that you do not have files with similar names in the directory to which you are sending the document. While you can overwrite an identical file to check out the file, when you check in the document, you must ensure that you have the correct document.</p>
<b>Cancel</b>	<p>Select to cancel checking out the file. This enables you to select certain amendments to open while canceling the checkout of others.</p>
<b>More Info</b> (more information)	<p>Select to access the Microsoft Internet Explorer Help utility and web page, where you can view more information about downloading files.</p>

To complete the editing process:

1. Click the **Save** button.

The Save As page appears, where you can define the file location. The file name for the document is set by the system and should not be changed. It must remain as a Microsoft Word .xml file format after you complete edits. Select a folder where you want to save the document on the local computer.

2. Click the **Save** button.

After the file is downloaded, the Download Complete page appears.

3. Click the **Open** button.

The system launches Microsoft Word and opens the document for editing. You can also click the **Open Folder** button to open the folder in which you placed the file.

When you check out multiple files, you process them at the same time, but you must open each one and save it individually. The same is true for checking in files.



## Check In Document Page

Use the Check In Document page (CS\_DOC\_VERSIONS\_SP) to check in documents.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Check In** button on the Document Management page.

Use this page to select the version and enter a brief description of the changes. The page appears when you click the **Check In** button. If you have also checked out amendments, the system displays a message that multiple files are to be uploaded and provides instructions on the page.

<b>Field or Control</b>	<b>Description</b>
<b>Version</b>	Select the option for how you want the version to increment for the file that you are checking in.
<b>Same Version</b>	Select to use the version that appears in this field as the current document version when you check in the document. This version number appears when the system references the document. This option is available only if you have selected the <b>Allow Check-In as Same Version</b> check box on the Document Format and Options page.
<b>Minor Version</b>	Select to use this version as the current document version when you check in the document. This version number appears when the system references the document. This is also the default version when you check in the document. Minor versions begin with <i>0.01</i> as the version number.
<b>Major Version</b>	Select to change the updated document version to reflect major changes. For example, major changes might occur when milestones are reached in the contract's status. Major versions must be selected and begin with <i>1.00</i> as the version number.
<b>Update Amendment File</b>	<p>Select to update the amendment file automatically with compared adds, changes, and deleted text that you have made to the main amended contract document. When selecting this check box, a server-side compare is performed between the last executed main contract document and the latest version that has been checked in. Those changes are inserted into the location in the separate amendment document based on the location of the amendment placeholder section in the amendment configurator.</p> <p>This option enables you to edit only the main contract and have the comparison performed for you to extract changes to the separate amendment file as a starting point for edits within the separate amendment file. This option applies only when the amendment option is <i>Amend Contract with Amendment Files</i> and the current document is in an amendment cycle and the amendment file's configurator ID has an amendment placeholder section defined within the structure.</p>

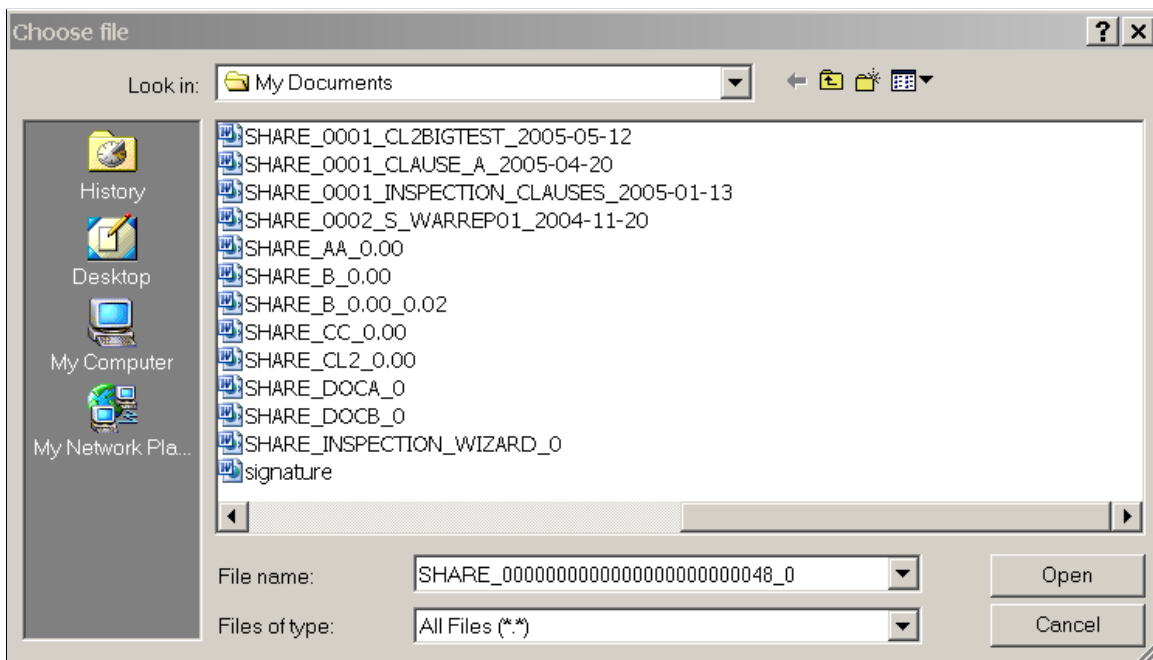
<b>Field or Control</b>	<b>Description</b>
<b>Comments</b>	Enter a description for the changes that were made to the document. The comments that you enter appear in the document's history. To view comments for all versions of the document, click the <b>Document Version History</b> link on the Document Management page.

To locate the document for check-in:

1. Click **OK** to proceed, and a prompt appears for you to enter the filename and path to locate the file that you are checking in.
2. Either enter the file name and path or click the **Browse** button to locate the checked out document.

The Choose file page appears.

This screen shot illustrates the Choose file window.



To check in the document:

1. Select the document from its location.

The system highlights the selection.

2. Click the **Open** button.

The check-in page appears with the file name and path.

3. Click the **Upload** button.

The system uploads the updated version of the document into the library.

The system validates the file when you upload it and provides messages about the check-in process.

---

**Note:** The check-in and upload process does not delete local files from the client machine. These files should be deleted periodically.

---

## Viewing Documents from the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to view documents.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **View Document** button on the Document Management page

The **View Document** button launches the current version of the document in Microsoft Word, but does not check it out. If you have checked out the document, the view document function opens a version of the document that is prior to the document that is checked out. The view does not include any edits that may have been made to the checked out document.

To view documents, click the **View Document** button. The File Download page appears.

### Related Links

[Viewing Documents from the Document Management Page](#)

## Canceling Document Checkout from the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to cancel document checkout.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Cancel Check Out** button on the Document Management page

The **Cancel Check Out** button is available only when a document has been checked out. You may want to cancel the check out if you learn that the document does not require an update after you access it. When you cancel the check out, any updates that you made to the document will be lost. The system makes the document available for editing after you cancel the check out.

---

## Viewing Document Version History

### Pages Used to View Document Version History

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Document History Page</a>	CS_DOC_HIST	View document history.
<a href="#">Attachment and Related Document History Page</a>	CS_DOC_ATTHST_SEC	View attachment and related document history.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">PO History vs Document History Page and PO Contract Version History vs Document History Page</a>	CS_DOC_CHGHIST_SP	View source version history. The page title changes for this object name depending on the source transaction for the document.
<a href="#">Dispatch History Page</a>	CS_DOC_DSPHIST_SEC	View dispatch history.
<a href="#">Collaboration History Page</a>	CS_DOC_COLL_HIST	View which collaborators have reviewed a document and when they collaborated on it.
<a href="#">Generation History Page</a>	CS_DOC_LOGHIST_SEC	View generation history.

## Document History Page

Use the Document History page (CS\_DOC\_HIST) to view document history.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Document Version History** link on the Document Management page.

This example illustrates the fields and controls on the Document History. You can find definitions for the fields and controls later on this page.

**Document History**

SetID: SHARE Contract ID: 0000000000000000000000051  
 Vendor: CAMPER'S WAREHOUSE

Document Action: **\*\* Summary Statuses + Edits \*\*** [View Source Version History](#) [Return to Document Management](#)

Document History Customize | Find | View All | First 1-9 of 9 Last

Select	DateTime	Document Action	Last User to Take Action	Version	View Attachments	Details...
<input type="checkbox"/>	09/24/09 4:46PM	Routed for External Review	Kenneth Schumacher	<a href="#">0.01</a>		
<input type="checkbox"/>	09/24/09 4:30PM	Finalized Ext. Collaboration	Kenneth Schumacher	<a href="#">0.01</a>		
<input type="checkbox"/>	09/24/09 4:28PM	Routed for External Review	Kenneth Schumacher	<a href="#">0.01</a>		
<input type="checkbox"/>	09/24/09 4:25PM	Routed for Internal Review	Kenneth Schumacher	<a href="#">0.01</a>		
<input type="checkbox"/>	09/24/09 3:50PM	Checked In	Kenneth Schumacher	<a href="#">0.01</a>		
<input type="checkbox"/>	09/24/09 1:15PM	Rebuilt Document	Kenneth Schumacher	<a href="#">0.00</a>		
<input type="checkbox"/>	09/24/09 12:50PM	Rebuilt Document	Kenneth Schumacher	<a href="#">0.00</a>		
<input type="checkbox"/>	09/23/09 9:51PM	Rebuilt Document	Kenneth Schumacher	<a href="#">0.00</a>		
<input type="checkbox"/>	09/23/09 4:30PM	Initial Version Created	Kenneth Schumacher	<a href="#">0.00</a>		

[Compare Selected Word Documents](#)

[Return to Document Management](#)

You view document history based on all actions that have been taken against the document or on a specific action. To limit the amount of data to review, select a specific action in the **Document Action**

field. If you want to compare documents, you can limit the returned document actions and make document comparisons easier by selecting:

- **\*\* Summary Statuses Only \*\***

Select to limit the search to the 18 most basic document actions, such as dispatching, deactivating, importing, approving and executing documents.


- **\*\* Summary Statuses + Edits \*\***

Select to limit the search to the 18 most basic document actions, plus 6 additional actions such as accepting a supplier version, checking in, refreshing and rebuilding documents.

If you are viewing the history of a purchase order document or purchasing contract, the **View Source Version History** link appears. Click this link to view and compare information about when the contract document was created or refreshed compared to history relating to the purchasing contract or the purchase order transaction, such as change orders or contract versions, along with a history of changes to the purchase order or purchasing contract.

See [PO History vs Document History Page](#) and [PO Contract Version History vs Document History Page](#).

<b>Field or Control</b>	<b>Description</b>
<b>Select</b>	Select to mark this document version as one of the versions that you want to compare. You must select two documents to compare. The system displays a warning message when you click the <b>Compare Selected Documents</b> button if you select one or more than two documents.
<b>Date/Time</b>	Displays when the action took place for updated version history for the document.
<b>Document Action</b>	Displays the action that was performed against the document.
<b>Last User to Take Action</b>	Displays who performed the action against the document.
<b>Version</b>	<p>Displays the version of the document against which the action took place. Click the link to view a copy of the document as it was updated after the action was complete. This version is not the same as the version used to track changes to the transactional contract.</p> <hr/> <p><b>Note:</b> The version link is present for all actions taken against the document management page even if the document did not change specific to that action</p> <hr/> <p><b>Note:</b> If you check in documents using the same version, links that appear for rows pertaining to that specific version number link to the current version of the Microsoft Word document. This happens because the previous history of the document was overwritten when the document was checked in as the same version.</p> <hr/>

<b>Field or Control</b>	<b>Description</b>
<b>Amendment</b>	Displays when separate amendment files are associated with the document. Click the link to access the amendment to view its state when the update was made. When multiple amendments exist, the system assigns a number to them. You can click the number to view a specific amendment.
<b>View Attachments</b>	Displays when an attachment has been added to a contract ID or ad hoc document ID. Click the link to access the Attachment History page, where you can select an attachment to view and view its history.
	Click the <b>View Executive Summary</b> button to view the executive summary document.
<b>Details</b>	Displays when an action has more details associated with it, such as dispatch details, collaboration details, and so on.
<b>View</b>	Displays who has viewed the document. The view history provides an audit trail of who accessed the main document or its amendment files. When a user clicks the document's <b>View</b> button, the system records the action for the history. The history is logged when a document is viewed internally, and externally. Select the <b>Log View Action in History</b> check box on the Document Type page to make this history available.
<b>Compare Selected Documents</b>	<p>Click to compare the two documents that you have selected. This enables you to compare any two document versions in history versus using the <b>Compare Documents</b> button on the Document Management page. That button only enables you to compare the current against a refreshed, re-created, or last executed version. Using the <b>Compare Selected Documents</b> button, the system creates a temporary version that provides you a Microsoft Word document highlighting the differences between the two selected documents.</p> <hr/> <p><b>Note:</b> Comparing selected documents requires that you prepare the system to use the compare feature which includes selecting to enable compare functionality on the Installation Options page.</p> <hr/> <p>See <a href="#">Setting Up Document Comparison and Rendering</a>.</p>

## Comments Tab

Select the Comments tab.

Use the page to review all comments for a document or comments pertaining to specific actions that were performed against the document. The system generates comments for certain actions such as refresh and generate.

## Document Details Tab

Select the Document Details tab.

Use this tab to review the status of the document, document type, administrator, filename, amendment file name, configurator ID, amendment configurator ID, document ID, and import type when specific actions were taken. You can also review cycle start and end times and how long it took the document to go through the review cycle.

## Attachment and Related Document History Page

Use the Attachment and Related Document History page (CS\_DOC\_ATTHST\_SEC) to view attachment and related document history.

Navigation:

Click the **View Attachments** link on the Document History page.

See [Viewing and Uploading Attachments and Related Documents](#).

This example illustrates the fields and controls on the Attachment and Related Document History page. You can find definitions for the fields and controls later on this page.

**Attachment and Related Document History**

SetID: SHARE Contract ID: 000000000000000000000000000048  
 Vendor: Midtown Computer Supplies

Attachments			
Files	Description		
<input checked="" type="checkbox"/>	SHARE_000000000000000000000000000040_0.00.xml	Support Document	<a href="#">View</a>

Related Documents					
Related Documents	Details				
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ad Hoc	<a href="#">SHARE / ADH000000000000000000000000000001</a>	<input type="checkbox"/>	Draft

[Return](#)

Use this page to view the history of attachments, related documents, and purchase order attachments, and to access a read-only version of the attachment or document. An attachment is an additional, stand-alone document that is attached to the document. A related document is another document-authoring system document and can include imported documents. A purchase order attachment is an attachment that was uploaded using the Contract Entry component. The **PO Contract Attachments** grid appears only for purchasing contracts and when an attachment has been added to the contract.

The **Contract ID** and **Ad Hoc ID** fields display the ID for either the ad hoc or the contract document to which the attachments and documents belong.

## Attachments

This grid displays information about an uploaded attachment. The Description tab contains the document description.

<i>Field or Control</i>	<i>Description</i>
<b>Allow for Email</b>	Select to enable this attachment to be included when you send the document to contacts or when you dispatch the document.
<b>File Name</b>	Displays the name that the system uses to upload the file and attach it to this document.
<b>Title</b>	Displays the name that is assigned to the attachment.
<b>View</b>	Click to open the attachment for this document. This is a read-only version of the file.

## PO Contract Attachments

This grid displays information about an attachment that was uploaded for the contract and included as part of the purchasing contract document.

<i>Field or Control</i>	<i>Description</i>
<b>Email to Supplier</b>	Displays whether the <b>Email to Supplier</b> check box on the Contract Entry Header Comments page is selected. If it is selected, the system includes the attachment with the email for this document. You cannot update the field using the document authoring system.
<b>Comment Type</b>	Displays the type of comment that was entered for the header.
<b>Attached File</b>	Displays the name of the file. You assign this name when you upload the file.
<b>View</b>	Click to view the attachment.

## Related Documents

This grid displays information about documents that have been added to the current document as related documents. The Details tab contains the document's state, such as active, its version, and whether amendments exist for the related document.



<b>Field or Control</b>	<b>Description</b>
<b>Allow for Email</b>	Select to enable this document to be emailed. If the document has its own dispatch step, you cannot include it in the dispatch step for the current document.
<b>Source Transaction</b>	Displays whether the document is an ad hoc or purchasing contracts document.
<b>Ad Hoc ID and Contract ID</b>	Displays the ID for the related document.
<b>Internal</b>	Displays whether the document is for internal use only.
<b>Document Status</b>	Displays the current status of the related document, regardless of the status it was at when it was added as a related document.

## PO History vs Document History Page and PO Contract Version History vs Document History Page

Use the PO History vs Document History page (CS\_DOC\_CHGHIST\_SP) or the PO Contract Version History vs Document History page to view source version history.

The page title changes for this object name depending on the source transaction for the document. If the document is a purchase order document, the system displays the PO History vs Document History page. If the document is a purchase order contract document, the system displays the PO Contract Version vs Document History page.

Navigation:

Click the **View Source Version History** link on the Document History page.

You use this page to compare purchase order or purchasing contract history with the history of a contract document. This helps you understand contract versions in which, for example, document amendments were created or the document was dispatched. The system displays the source history chronologically in ascending or descending order.

You can have a change order without an amendment, have an amendment without a change order and have an amendment with a change order.

<b>Field or Control</b>	<b>Description</b>
<b>Description</b>	<p>Displays the type of system action that was performed on the source transaction or document. Values for the field depend on whether the source transaction is a purchase order or purchasing contract transaction. For example, after creating a document for a purchasing contract, the field displays the <i>Initial Contract Created</i> value. Then, if you are using version control and create a new contract version, the field displays the <i>Contract Version Created</i> value.</p> <p>Also, each time the document is updated, the system records the description, such as when the contract document was amended or dispatched.</p>
<b>Source Version</b>	<p>Displays the version of the purchasing contract or change order number of the purchase order on which the corresponding description is based.</p>
<b>Document Version</b>	<p>Displays the document version at which the document action took place. Values appear in this field for only document updates. The versions include major and minor versions.</p>
<b>Amendment</b>	<p>Displays the amendment number. The amendment number corresponds to the document version.</p>
<b>Date</b>	<p>Displays the date on which the action in the <b>Description</b> field took place.</p>
<b>Time Value</b>	<p>Displays the time that the action took place. The system does not record time values for purchase order and purchasing contract actions.</p>

## Dispatch History Page

Use the Dispatch History page (CS\_DOC\_DSPHIST\_SEC) to view dispatch history.

Navigation:

Click the **Details** link for dispatched or sent documents on the Document History page.

Use this page to review to whom this document was dispatched or when the dispatch action was taken. The page is available only when you select a document with the *Dispatch* or *Sent Document* document action.

### Related Links

[Sending Documents to Internal and External Contacts](#)

## Collaboration History Page

Use the Collaboration History page (CS\_DOC\_COLL\_HIST) to view which collaborators have reviewed a document and when they collaborated on it.

Navigation:

Click the **Details** link for collaborated documents on the Document History page.

### Related Links

[Collaborating on Documents](#)

## Generation History Page

Use the Generation History page (CS\_DOC\_LOGHIST\_SEC) to view generation history.

Navigation:

Click the **Details** link for rebuilt and re-created documents and amendments on the Document History page.

This example illustrates the fields and controls on the Generation History page: Log tab (1 of 2).

**Generation History**

SetID: SHARE Ad Hoc ID: ADH000000000000000000000000

Generation Warnings							
Customize   Find   View All   Download   First   1 of 1   Last							
Message	Content Type	Content ID	Source Content Type	Source Content ID	Bind Type	Bind Variable	File Type
Effective Dated Content is not Approved	Clause	ZCLPROMPT1					Main

Wizard Log							
Customize   Find   View All   First   1-5 of 5   Last							
Question Group	Display Sequence	Question	Answer	Bind Variable	Group Sequence	Navigate	Jump to Group Sequence
ZQGPROMPT1	1	Select Country	ABW	ZWBPROMPT1COUNTRY	10		
ZQGPROMPT1	2	Select Currency	ADP	ZWBPROMPT2CURRENCY	20		
ZQGPROMPT1	3	Select Buyer	AMA2	ZWBPROMPT3BUYER	30		
ZQGPROMPT1	4	Select Province	AB	ZWBPROMPT4PROVINCES	40		
ZQGPROMPT1	5	Select State	AK	ZWBPROMPT5STATE	50		

This example illustrates the fields and controls on the Generation History page: Log tab (2 of 2).

Question Group	Display Sequence	Question	Answer	Bind Variable	Group Sequence	Navigate	Jump to Group Sequence
ZQGPRMPT1	1	Select Country	ABW	ZWBPRMPT1COUNTRY	10		
ZQGPRMPT1	2	Select Currency	ADP	ZWBPRMPT2CURRENCY	20		
ZQGPRMPT1	3	Select Buyer	AMA2	ZWBPRMPT3BUYER	30		
ZQGPRMPT1	4	Select Province	AB	ZWBPRMPT4PROVINCES	40		
ZQGPRMPT1	5	Select State	AK	ZWBPRMPT5STATE	50		

Occurrence	Bind Type	Bind Variable	Variable Value	Bind Change Type	File Type
0	Wizard	ZWBPRMPT1COUNTRY	ABW		Main
0	Wizard	ZWBPRMPT2CURRENCY	ADP		Main
0	Wizard	ZWBPRMPT3BUYER	AMA2		Main
0	Wizard	ZWBPRMPT4PROVINCES	AB		Main
0	Wizard	ZWBPRMPT5STATE	AK		Main

Configurator Expansion

Return

Use this page to view document processing history for ad hoc, purchase order contract, and purchasing contract documents. This information indicates system processing conditions and any errors that were produced during the document's generation.

**Note:** The **Generation Log** link on the Document Management page provides the generation history for the current document version.

**Related Links**

[Viewing Document Generation Logs](#)

## Setting Up Default Document Preferences

### Page Used to Set Up My Default Document Preferences

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">My Default Document Preferences Page</a>	CS_OPR_PREFERENCE	Define default document preferences.

### My Default Document Preferences Page

Use the My Default Document Preferences page (CS\_OPR\_PREFERENCE) to define default document preferences.

Navigation:

## Supplier Contracts > Create Contracts and Documents > My Default Document Preferences

This example illustrates the fields and controls on the My Default Document Preferences page. You can find definitions for the fields and controls later on this page.

### My Default Document Preferences

**Default Internal Collaborators** Personalize | Find | View All | | First 1-2 of 2 Last

**Collaboration Settings**

User	Description	Collaborator	Can Edit During Collaboration	
AMA1	McGrann,Michelle	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
AMA2	Ed Regalado	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

**Role Level View Access** Personalize | Find | View All | | First 1 of 1 Last

Role Name	Description
ADMINISTRATOR	<input type="button" value="+"/> <input type="button" value="-"/>

Use this page to add a list of users who will serve as contacts, interested parties, collaborators, and digital signers for documents. Collaborators are users other than the primary owner of the contract who can view contracts during or after collaboration, and if needed, edit the contract during the collaboration process. Collaborators are users who are defined in the PeopleSoft system. You also use the page to define roles that you want to have view access for documents.

<b>Field or Control</b>	<b>Description</b>
<b>User</b>	Select users whom you want to define as default collaborators for contracts that you create. The system automatically includes these users in the contacts list for each document at the time of its initial creation. You can add other users when you route the document.
<b>Collaborator</b>	Select to indicate that the user is automatically defined as a collaborator on documents that are created by this user ID. During document reviews, collaborators can view the document and make comments; however, unless they have been authorized, they cannot edit the document.
<b>Can Edit During Collaboration</b>	Select to indicate that the collaborator can edit documents during the collaboration process. If collaborators can edit the document, then they can check out the document and enter their changes. After collaboration is complete, the document administrator can check out the document, review the input, decide which changes to accept, and check in the document.  <b>Note:</b> If you leave both the <b>Collaborator</b> and the <b>Can Edit During Collaboration</b> check boxes deselected, you can associate these users as interested parties to a specific contract for read-only access any time during the contract's life cycle.

## Sign Settings

Use this tab to set up digital signature information for internal users. The tab is only available when the **Enable Internal Signatures** check box is selected on the Installation Options page. Digital signatures enable internal users to digitally sign a document using Adobe Acrobat or Microsoft Word signature features. Typically, the electronic version of the contract can replace the paper-based version.

<i>Field or Control</i>	<i>Description</i>
<b>User</b>	Select the user ID for the user who you want to sign your documents.
<b>Required to Sign the Document</b>	Select this check box to indicate that this internal user is required to sign any contract documents created by the current user ID.
<b>Visible Signer</b>	Select this check box to indicate that this user is a visible signer. A visible signer must provide a visible electronic form of their handwritten signature on the contract paper-based document. An invisible signer is a signer whose digital signature is not actually visible on the contract document. The invisible signer signature serves mainly as a security indicator that the user has verified the contents of the document.
<b>Sign Order</b>	Enter a numeric value that indicates the order in which the user will sign the document. The system uses this value to sequentially route the document to the signers when it routes the document for signatures.
<b>Signing Title</b>	Enter a job title that describes the collaborator's position related to the contract document.

See [Understanding Digital Signatures](#).

## Role Level View Access

Use this grid box to select the role for which you want the users to have view access for your documents. Select a role value using the **Role Name** field.

## Related Links

[Understanding Document Collaboration](#)

[Understanding Digital Signatures](#)

## Collaborating on Documents

### Pages Used to Collaborate on Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Internal Contacts/Collaborators Page</a>	CS_DOC_COLLAB	Route documents for internal collaboration.
<a href="#">Route for External Collaboration Page</a>	CS_DOC_COLL_EXT_SP	Route documents for external collaboration.
<a href="#">Document Management Page</a>	CS_DOC_MAINT	<p>Modify collaboration, cancel collaboration, respond to collaboration requests, and finalize collaboration.</p> <p>See <a href="#">Modifying Collaboration Using the Document Management Page</a>, <a href="#">Canceling Collaboration Using the Document Management Page</a>, <a href="#">Responding to Collaboration Requests Using the Document Management Page</a>, <a href="#">Finalizing Internal Collaboration Using the Document Management Page</a>, and <a href="#">Finalizing External Collaboration Using the Document Management Page</a>.</p>

### Understanding Document Collaboration

Collaboration is the process of reviewing and negotiating the terms of a clause or document. Collaborators are users other than the primary owner of the contract who can change or review documents and transactions. Collaborators can be internal users or external users.

Collaboration is a negotiation step in the approval of documents within the PeopleSoft system; however, it does not use PeopleSoft Approval Framework. Instead, document collaboration is set up using the PeopleSoft standard workflow and worklist entries for collaborators. Collaboration is an optional step for all contracts and is not required to move a contract into the approval process. When you collaborate on a purchasing contract or ad hoc document, you use Microsoft Word to review and change the document and then use the Collaboration process to share and track the collaboration.

The system provides a default list of collaborators to the document based on the list of collaborators that were identified on the My Internal Contacts/Collaborators page for the document administrator when the document was initially created. You can add and delete collaborators anytime throughout the life cycle and during a collaboration cycle.

You can initiate multiple collaboration cycles until a document is dispatched. Throughout the document life cycle, the document administrator and users who have authority for the document administrator can access the Document Management page.

You can also insert general users who are interested parties to have view-only access to the document. Use the Internal Contacts/Collaborators page for a specific document, list the user name, and leave the Collaborator and Edit During Collaboration check boxes deselected.

## Document Collaboration for Internal Users

Internal collaboration begins when you create a purchase order contract, purchasing contract, or an ad hoc document and want to ensure that it meets the needs of all organizations. The document comprises PeopleSoft metadata and a Microsoft Word document.

For example, suppose that as the contract owner, you want to collaborate on the development of a waste-disposal contract document. After determining the team, you route the document for review. The first reviewer is a hazardous material specialist who replaces the standard hazardous-material, special-handling clause with one that has more detail about the type and nature of the materials and the required safety equipment for handlers.

The second reviewer notices that the contract doesn't meet the vehicle weight limit for the designated location, and reduces the limit from 12 to 10 tons based on new bridge standards to the access area. The last reviewer adds a one percent incentive bonus if the entire contract is processed with no inspector citations for handling violations in any of the monthly reports. As the owner of the contract, you realize that the budget does not have resources for bonuses, so you deny the last update, but approve the first two. You can then post the contract for suppliers to review.

While the previous example illustrates users as first, second, and last, the collaboration process routes to all three simultaneously and the check out of the document is accomplished through a first-come, first-served basis.

At any point during collaboration, the contract owner or an authorized alternate can stop the collaboration process. This cancels all worklist entries and sets the contract status back to Draft if no one has collaborated on it yet. If some collaborators have already collaborated on the contract and the process is stopped, the system sets the status to Collaborated Pending Review.

These steps describe the collaboration process:

1. The document owner, contract specialist, or administrator adds a new contract or ad hoc document, or opens an existing document.

If the status on the Contract Entry page is *Draft*, the administrator can:

- a. View and edit a list of collaborators that appears by default from the contract owner's collaborator list.

The administrator can delete collaborators as long as the collaborator does not have the contract checked out and has not reviewed the document.

- b. Route the contract for internal collaboration.

The system displays a message if collaborators have not been defined. Email and worklist routings are sent to all collaborators, and the contract status is set to Pending Collaboration.

2. The administrator or contract specialist routes the contract for collaboration.

This routing can also be an external routing that is sent to a single external user.



3. The collaborator accesses the system and then the Document Management page using one of these methods:
  - Approval worklist.
  - Email link.
  - Directly through the Supplier Contract Management menus.

4. Collaborators perform their edits or reviews using the Document Management page.

Collaborators click the **Edit Document** button to edit a copy of the document using Microsoft Word or the **View Document** button to review a read-only copy. You control the edit access for each collaborator by setting the collaborator options on the collaborator list page.

5. Collaborators use the Document Management page to enter their comments, and then click the **Mark as Reviewed** button.

The system completes the worklist entry and changes the status for the collaborator's entry. If the collaborator is the final collaborator, the system updates the contract status to Collaborated/Pending Review and sends the owner a notification to review and accept or reject the changes that were made by the collaborators.

If the collaborator does not take an action, the worklist entry remains the same with no approval action taken.

6. After internal collaboration is complete, the administrator must review and accept or reject the changes and suggestions that were made in the document.

After reviewing the approvals and checking out the document, the administrator can make changes to the document and accept, deny, or push back approver updates. When finished, the administrator checks in the revised version of the document.

7. The administrator clicks the **Finalize Collaboration** button.

The system updates the contract status to Collaborated.

## Document Collaboration for External Users

External collaboration is the process of sending contract documents to an external user for review and updates and who then uploads the document where administrators or contract specialist can manually incorporate the reviews into a new version of the document.

You can route documents for external collaboration to only a single supplier user, who is defined as the primary on the Supplier - Contacts page. This external user can then route the document to gather inputs from the supplier side. During external collaboration, the system stages all files for review on the external side and keeps the files distinct from the current core files. The administrator reconciles the returned files to decide to accept the files or manually copy or paste changes into the official copies. Attachments are also staged so that new attachments added by the external user will have to be accepted before they become part of the core attachments.

External collaboration provides additional collaboration statuses.

**Note:** External collaboration statuses are not available to supplier users. The statuses can only be viewed by employee users. The system provides supplier users with text that indicate where the document is in the life cycle, and whether they are required to take an action on the document.

The external collaboration statuses include:

- Collaborated

This status indicates that the external collaboration is complete. At this point the supplier can re-send the document for external editing or upload the document to the system for internal collaboration, where the administrator can either route the document for collaboration or submit it to the approval process.

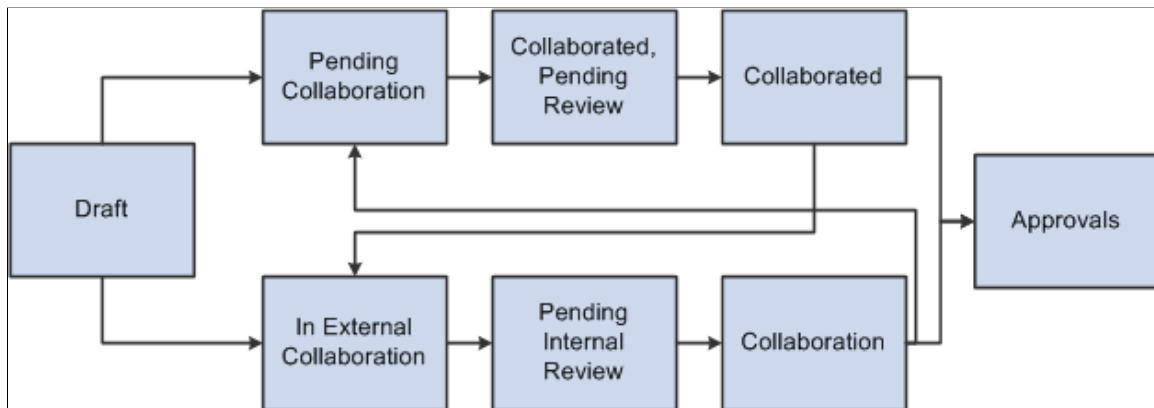
- In External Collaboration

This status indicates that the document is in collaboration by the supplier user.

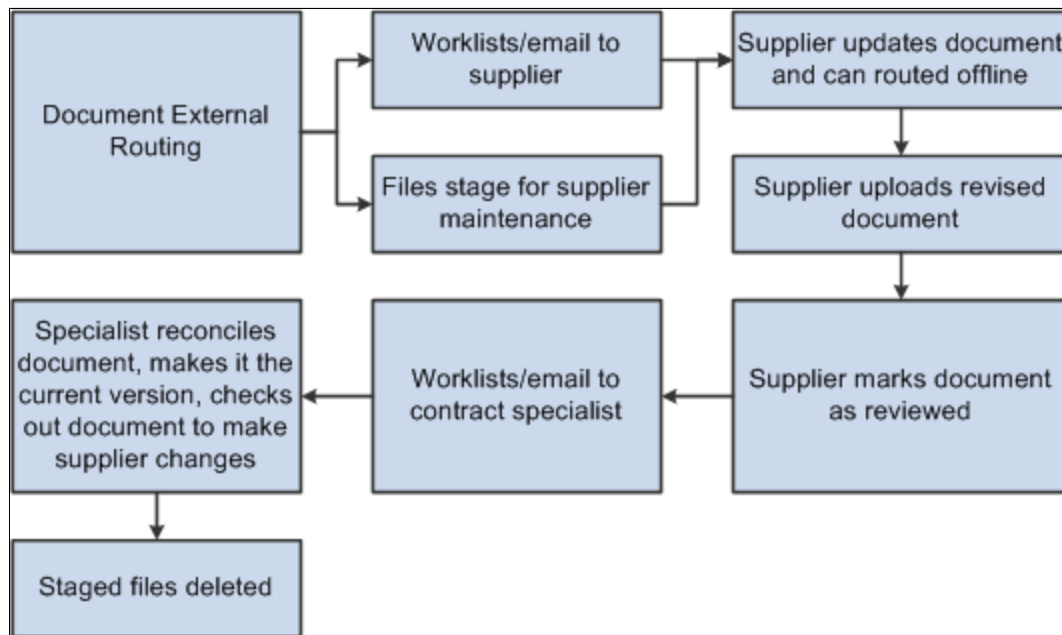
- Pending Internal Review

This status indicates to the administrators or specialists that they need to reconcile the changes that the supplier made with the actual contract document and to finalize, accept, and reject changes.

This diagram illustrates the different paths that a document can use to go through external collaboration statuses, beginning with the Draft status and ending by submission for approvals:



The diagram illustrates system processes that take place when a document is sent for external collaboration. The system uses e-mail and worklist notifications to send and receive notices, and stages files while the document is in review:



The system protects the document while it is in collaboration by keeping the files separate from the actual contract document. These are staged files and are used until the collaborated document is accepted. At the end of the process, the system deleted these staged files.

## Related Links

[Viewing and Editing Documents](#)

## Internal Contacts/Collaborators Page

Use the Internal Contacts/Collaborators page (CS\_DOC\_COLLAB) to route documents for internal collaboration.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Route Internally** button on the Document Management page.

Collaboration is optional. The system does not use approval framework in the process because of the need to add and remove reviewers throughout the process. If collaboration is activated, you cannot submit the document for approval. Likewise, if the document has been approved, you cannot route it for collaboration.

---

**Note:** The system warns you if an internal collaborator in the list is not available and the user has an alternate person to be notified in her absence. The system provides the administrator an option to substitute the alternate user that is specified and leave the original collaborator on the list as a view only user.

---

The system initially populates the page with user ID that have been defined using the **Internal Contacts List** page.

You use this page as a document administrator or as a collaborator to take action on a collaboration. Using the page you can:

- Add or remove collaborators.
- Route documents for collaboration.
- Add comments for a document
- View the collaboration status for the supplier document

---

**Note:** The Document Collaboration page is available only to the owner or administrator of the document.

---

<b>Field or Control</b>	<b>Description</b>
<b>Ad Hoc ID</b>	Displays the ad hoc document that you are submitting for collaboration. This field appears when you select an ad hoc document. Ad hoc documents are those that are not linked to a contract or work order.
<b>Contract ID</b>	Displays the contract to which this document is linked. This field appears when you select a document that is linked to a transactional Purchasing contract.
<b>PO ID</b> (purchase order ID)	Displays the purchase order on which the contract document is based. This field appears when you select a document that is linked to a transactional purchase order.
<b>Supplier ID</b>	Displays the supplier to which the contract applies. This field appears when you select a document that is linked to a transactional purchasing contract.
<b>User</b>	Select a user ID to add to the list of collaborators for this contract or ad hoc document. You can delete users if they do not have the document checked out or if the user has not collaborated the document.
<b>Collaborator</b>	Select to indicate that this user is a collaborator for this document. When the document is routed for collaboration, the system notifies this user.
<b>Can Edit During Collaboration</b>	Select to indicate that the corresponding collaborator can edit the Microsoft Word document. If you do not select this check box, the collaborator can access the document only as read-only.

<b>Field or Control</b>	<b>Description</b>
<b>Collaboration Status</b>	Displays the status of the collaborator's response to the document. When you initially send the collaboration request, the status is <i>Collaboration Pending</i> . After the collaborator marks the request as reviewed, the status changes to <i>Collaboration Complete</i> .
<b>Date Time</b>	Displays when the collaborator performed a collaboration task against the document.
<b>Collaboration Instructions</b>	Enter comments or instructions concerning the collaboration of this document. After completing the instructions, click the <b>Save</b> button. The system removes the instructions and appends them in the <b>Collaboration Comments</b> section.
<b>Collaboration Comments</b>	Displays comments that the administrator and collaborators have entered. You can expand the field.
<b>Route Internally</b>	Click to initiate the routing of the document for internal collaboration. The system generates emails and worklist entries, updates user entries to the status of Collaboration Pending, and changes the contract status to Pending Collaboration. If no collaborators have been identified for notification, the system produces an error message.
<b>Return to Document Management</b>	Click to return to the Document Management page, where you can perform other tasks that are related to the document.

## Route for External Collaboration Page

Use the Route for External Collaboration page (CS\_DOC\_COLL\_EXT\_SP) to route documents for external collaboration.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Route Externally** button on the Document Management page.

This page displays a list of people who are defined as external users for this document. You use the page to maintain external contact attributes, provide collaboration instructions, route a document externally, and during amendment cycles define whether amendment or amended files will be routed for collaboration. .

<b>Field or Control</b>	<b>Description</b>
<b>User</b>	Displays external users who have been defined on the External Contacts List page.

<b>Field or Control</b>	<b>Description</b>
<b>Allow Document View Access</b>	Indicates whether the external user has view access for the document. With view access, users can open and view a document. This value is assigned using the External Contacts List page.
<b>Primary Doc Owner</b> (primary document owner)	Indicates if the external user is designated as the primary document owner. This is the external user who is responsible for coordinating the document's review with other external users and then uploading the reviewed back to the PeopleSoft system. The primary document owner can make changes, but only one external user can be the primary document owner at a time.
<b>Owner for this Collaboration</b> (primary document owner)	Indicates which external user should be designated as the owner for this collaboration cycle. This enables you to assign an owner other than the primary document owner to be responsible for the collaboration of the document and for coordinating the document's review with other external users and then uploading the reviewed document back to the PeopleSoft system. Only one external user can be the owner for a collaboration cycle.  When you select this check box, the system also selects the <b>Can Edit During Collaboration</b> check box to provide edit authority to the collaborator.
<b>Can Edit During Collaboration</b>	Indicates whether the corresponding external user can edit the contract document.
<b>Collaborate on Main File</b>	Select to indicate that this user should collaborate on the core document file. This check box is available when you are sending an amended document for external collaboration and the amendment option is Amend Contract with Amendments.
<b>Collaborate on Amendment File</b>	Select to indicate that this user should collaborate on the amendment file. This check box is available when you are sending an amended document for external collaboration that has the additional amendment file. You can provide collaboration authority for the main file, amendment file, or both. The main and amendment files are staged for review on the external side and kept distinct from the core document files.
<b>Route Externally</b>	Click to route the document for external collaboration. The system sends an email or worklist notification to the primary document owner's primary email address that is defined in the PeopleSoft system. The user preference determines if the notification is an email or worklist notification.

## Modifying Collaboration Using the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to modify collaboration.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management .**

When a document is in collaboration, the administrator can click the **Modify Collaboration** button to add additional collaborators and route notification to those new collaborators without taking the document out of the collaboration process.

## Canceling Collaboration Using the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to cancel collaboration.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management**

After a document has been sent for collaboration, you can stop the collaboration using the **Cancel Collaboration** button. If a collaborator has not responded to the collaboration request, the system displays a message that indicates that the document status will be set back to Draft.

If the collaboration process has started, the system displays a message that indicates that the collaboration status will be set to Collaboration Pending Review. This gives the document administrator an opportunity to review the document or other collaborator comments before stopping the collaboration.

## Responding to Collaboration Requests Using the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to respond to collaboration requests.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management**

This example illustrates the fields and controls on the Document Management page (1 of 2).

### Document Management [Return to Document Search](#)

SetID:	SHARE	Contract ID:	0000000000000000000000000021
Vendor:	India TDS 194C1 Vendor		
Document Type:	ZDTPURCH2		
Description:	Contract Doc		
Administrator:	Kenneth Schumacher		
Sponsor:		Department:	

---

Version:	0.00	Created On:	08/24/09 5:52AM	<a href="#">Document Details</a>
Status:	Pending Collaboration	Last Modified On:	08/24/09 6:24AM	

---

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

▼ Collaboration Comments

Add Collaboration Comments

Save
Mark as Reviewed

This example illustrates the fields and controls on the Document Management page (2 of 2).

<p><b>View and Edit Options:</b></p> <div style="margin-bottom: 5px;"><span>View Document</span></div> <div style="margin-bottom: 5px;"><span>Edit Document</span></div> <p><a href="#">Add Attachments/Related Documents</a></p> <p><a href="#">Document Modification Summary</a></p> <p><a href="#">Document Version History</a></p>	<p><b>Review and Approval:</b></p> <div style="margin-bottom: 5px;"><span>Cancel Collaboration</span></div> <div style="margin-bottom: 5px;"><span>Modify Collaboration</span></div> <p><a href="#">Internal Contacts/Signers</a></p> <p><a href="#">External Contacts/Signers</a></p> <p><a href="#">Document View Access</a></p>	<p><b>Other Document Actions:</b></p> <p><a href="#">Generation Log</a></p>
--	--	---

Use this page to collaborate on a document. You access the worklist, and the request appears for you to respond to the collaboration. When you click the link for the document, this page appears with additional fields in which you enter comments and respond to the request.

<b>Field or Control</b>	<b>Description</b>
<b>Add Collaboration Comments</b>	Enter any comments that you might have about the document, such as changes that you made if you edited the document.
<b>Save</b>	Click to save the comments that you entered in the Add Collaboration Comments section. When you save the comments, the system clears the section and appends the comments to any that may already exist in the Collaboration Comments section.



<b>Field or Control</b>	<b>Description</b>
<b>Mark as Reviewed</b>	Click to respond to the collaboration request. The system removes the document link from the worklist and updates the collaboration status to Collaboration Completed on the Internal Contacts/Collaborators page.

## Finalizing Internal Collaboration Using the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to finalize internal collaboration.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management**

Use this page after reviewing and accepting, or rejecting, any changes that collaborators made to a Microsoft Word document. Click the **Finalize Collaboration** button after the review. After a contract, or ad hoc document, has been finalized, the status of the document changes to Collaborated. At this point, the document administrator can start another round of collaborations with the document, send it to external contacts, or route the document for workflow approval.

## Finalizing External Collaboration Using the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to finalize external collaboration.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management**

This example illustrates the fields and controls on the Document Management for finalizing external reviews (1 of 2).

**Document Management** [Return to Document Search](#)

SetID: SHARE Contract ID: [000000000000000000000000000025](#)

Vendor: ERNIE'S BIKE SHOP

Document Type: Standard Contract Document

Description: Volume Purchase Contract

Administrator: Calvin Roth

Sponsor: Department:

---

Version: 0.00 Created On: 08/25/09 3:33PM [Document Details](#)

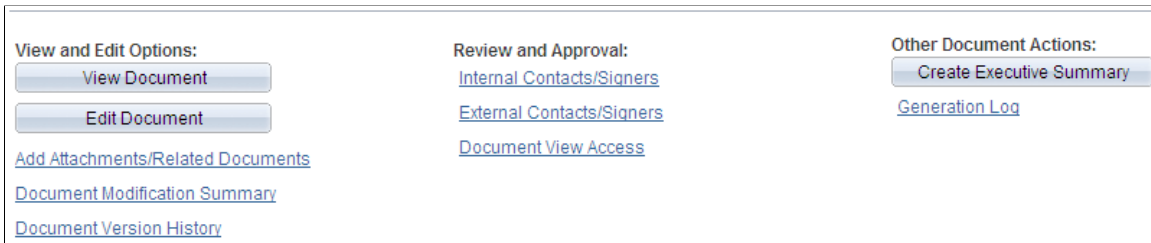
Status: Pending Internal Review Last Modified On: 08/25/09 3:34PM

**Supplier did not make any revisions or provide new attachments**

**Collaboration Comments**

[Supplier 2009-08-26-05.10.41.000000]  
We can move forward now with the supplies.

This example illustrates the fields and controls on the Document Management for finalizing external reviews (2 of 2).



External collaboration is when you send contract documents to supply-side users to review and comment about documents. You use this page to reconcile the collaboration and take it to either internal approvals or dispatch it for approval.

<b>Field or Control</b>	<b>Description</b>
<b>Accept Supplier's Revisions and Finalize</b>	<p>Click to accept the document updates made by the supply-side user and to set the document to Collaborated status. This button is available for the contract administrator after the supply-side users complete their collaboration. This button is not available if the supplier did not check in an acceptable format for the file. For example, if they checked in a .doc file instead of an .xml file. In this case, the contract administrator must manually apply any valid changes.</p> <p>When you click the button, the system displays the Accept Supplier's Revised Documents page. You use the page to maintain the document version and to add comments about the document.</p>
<b>Finalize Collaboration</b>	<p>Click to set the document to Collaborated status. Contract administrators use this option when they want to manually apply any suggested changes to the current version of the document by using the <b>Edit</b> or <b>Check In</b> buttons at the bottom of the page. After they have made the changes manually, they can click this button to complete the collaboration process.</p> <p>This button is available for the contract administrator after supply-side users complete their collaboration.</p> <hr/> <p><b>Note:</b> If you finalize collaboration without accepting suppliers revisions or attachments the revisions will be excluded from version control and kept only in the document history.</p> <hr/>
<b>View Revised Document</b>	<p>Click to open a document that has been collaborated on with an external user (supplier). This button appears on the contract owner's Document Management page after the supplier has completed the review.</p>

<i>Field or Control</i>	<i>Description</i>
<b>Compare Revised Documents</b>	Click to compare a supply-side revised document with the current version of the document. This enables you to better understand what changes may have been made by the supplier. The system opens a new temporary document that shows the changes, just as if you had compared the files using Microsoft Word compare functionality.

## Viewing Document Modification Summaries

### Page Used to View Document Modification Summaries

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Document Modification Summary Page</u>	CS_DOC_MODS_SUMM	View document changes.

### Document Modification Summary Page

Use the Document Modification Summary page (CS\_DOC\_MODS\_SUMM) to view document changes.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management .** Click the **Document Modification Summary** link on the Document Management page.

Use this page to view content that has been added, deleted, or changed in a document or a document amendment. Each time that a contract or amendment is edited and checked in, the system tracks and displays the summary plain-text version of changes on this page. When the changes pertain to clauses, you can use this page to help determine which clause changes in a document require workflow approval. The system can use the changes to include specific users in a workflow approval process.

This page is not intended for detailed change tracking of the document. To track detailed changes of a document, use the Microsoft Word - Track Changes feature.

<i>Field or Control</i>	<i>Description</i>
<b>Action</b>	Displays the type of action that is performed on the contract clause. The system displays clauses against which these actions are performed: <ul style="list-style-type: none"> <li>• Deleted</li> <li>• Added</li> <li>• Changed</li> </ul>

<i>Field or Control</i>	<i>Description</i>
<b>Content ID</b>	Displays the content against which the system performed an action. If a clause is not associated with the update, the field is empty.
<b>Numbered</b>	Displays the number of the content that has been updated. The number is applied when numbering is in the Microsoft Word document.
<b>Last Checked In</b>	Displays the date and time that the document content was last checked in.
<b>Last Created or Executed</b>	Displays the last time that the content was created or executed in a document.

## Viewing and Uploading Attachments and Related Documents

### Page Used to View and Upload Attachments and Related Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Attachments and Related Documents Page</u>	CS_DOC_ATTACH_SEC	View and upload attachments and related documents.

### Attachments and Related Documents Page

Use the Attachments and Related Documents page (CS\_DOC\_ATTACH\_SEC) to view and upload attachments and related documents.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Add Attachment/Related Documents** link or the **Modify Attachments/Related Documents** link on the Document Management page.

This example illustrates the fields and controls on the Attachments and Related Documents page. You can find definitions for the fields and controls later on this page.

**Attachments and Related Documents**

SetID: SHARE Contract ID: 00000000000000000000000000000048  
 Vendor: Midtown Computer Supplies

Upload another Document Attachment File

**Attachments** Customize | Find | View All | First | 1 of 1 | Last

Allow Email/Dispatch	File Name	Title	View	Delete
<input checked="" type="checkbox"/>	SHARE_00000000000000000000000000000040_0.00.xml	Support Document	View	-

**Related Documents** Customize | Find | View All | First | 1 of 1 | Last

Allow Email/Dispatch	Visible to Supplier	*Source Transaction	*SetID	Ad Hoc ID	Internal	Document Status
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ad Hoc	SHARE	ADH000000000000000000000000	<input type="checkbox"/>	Draft

OK Cancel

An attachment is any document that you want to associate with the document. Unlike documents, these attachments are not generated by the authoring system. Instead, they are stored along with the document and made available to support the document. You can use these attachments for additional information, including internal executive summaries, a supplemental contract addendum, supplier paper, and so on. The system stores the history of attachments that are associated with each version of the authored document in the document history.

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**Note:** After contract documents have been executed, you can no longer add attachments or related documents. If you reset the contract to Dispatch status or create an agreement, you can add attachments.

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You can designate an attachment as external. When you designate an attachment for external use, you can send it to external contacts by using the **Send to Contacts** button or the **Dispatch to Contracts** button.

You can also link to other documents that are defined in the document management system. These can be system-defined or imported documents that are managed using Supplier Contract Management.

In addition, for documents that have a source transaction type of purchase order or purchasing contract, you can view attachments that exist on the purchasing transactional contract from within this attachments page. You can send these attachments to contacts who are defined as external contacts for the document. Only those attachments that have been set to send to suppliers from within the PeopleSoft Purchasing contract are eligible for dispatches using email.

After uploading attachments and linking related documents, click **OK** to save the updates. If you define a document as a related document, the system displays the **Where Used as a Related Document** link on the Document Management page for the current contract document.

## Attachments

Use this grid to maintain attachment information. An attachment is an additional stand-alone document that is attached to the current document. Select the Description tab to add a document description.

<b>Field or Control</b>	<b>Description</b>
Upload a Document Attachment File <b>Upload another Document Attachment File</b>	Click to initiate the upload process that you use to browse other sources for attachments to use with this document. This link is available as long as the contract document is not in an Executed status.
<b>Allow Email Dispatch</b>	<p>Select to indicate that this attachment should be available for external contacts when the document with which it is associated is sent or dispatched to contacts for review. When you send or dispatch a document for external review, you can include attachments. If this check box is selected, the system highlights the <b>Attachments</b> check box on the Send to Contacts and Dispatch pages. Then you can determine whether to send the attachment.</p> <p>If you do not select this check box, the system disables the <b>Attachments</b> check box for sending and dispatching and the attachment cannot be included with the document.</p>
<b>File Name</b>	Displays the name that you assigned to the file when you uploaded it to the document authoring system. For tracking and informational purposes, this should be the same file name as the file name in the directory.
<b>Title</b>	Enter a description of the attachment. The system includes this description in history records. You can enter up to 254 characters in the field.
<b>View</b>	Click to open a read-only copy of the selected attachment.
<b>Delete</b>	Click to remove an attachment from the document. The attachment is removed immediately, but you must click <b>OK</b> to save the page and the deletions.

### PO Contract Attachments


Use this grid to view attachments that were uploaded using the Purchasing Header Comments page. To access the page, use the **Edit Comments** link on the Contract page. The grid displays the settings that were made in PeopleSoft Purchasing.

<b>Field or Control</b>	<b>Description</b>
<b>Email to Supplier</b>	Appears if the <b>Email to Supplier</b> check box on the Contract Entry Header Comments page is selected. If this check box is selected, the attachment is included with email for this document. You cannot update the field in the document authoring system.
<b>Comment Type</b>	Displays the comment type from Purchasing.
<b>Attached File</b>	File name of the attachment that was assigned in Purchasing.
<b>View</b>	Click to open the attachment from the Purchasing contract.

## Related Documents

Use this grid to link other documents as related documents to this document. Related documents can be any type of existing ad hoc, purchasing contract, or purchase order document, and you can only add a document once. Select the Details tab to view the document's state, its version, and whether amendments exist for the related document.

<b>Field or Control</b>	<b>Description</b>
<b>Allow Email Dispatch</b>	<p>Select to indicate that this related document should be available for external contacts when the document with which it is associated is sent or dispatched to contacts for review.</p> <hr/> <p><b>Note:</b> You cannot include a related document for email dispatch when the corresponding document has its own dispatch step. You can include only documents that do not have their own dispatch step in the email.</p> <hr/>
<b>Visible to Supplier</b>	Select to indicate that this related document should be to external users.
<b>Source Transaction</b>	Displays whether the document is an ad hoc, purchase order, or purchasing contract document. Based on the values that you select in this field, the system adds the <b>SetID</b> , <b>Business Unit ID</b> , <b>Contract ID</b> , and <b>PO Number</b> fields.
<b>SetID</b>	Select the SetID from which to select an ad hoc or purchasing contract document.

<b>Field or Control</b>	<b>Description</b>
<b>Business Unit ID</b>	Select the business unit from which to select a purchase order contract document. This field is available for purchase order contract documents.
<b>Ad Hoc ID</b>	Select the related ad hoc document.
<b>Contract ID</b>	Select the related ad hoc document.
<b>PO Number</b> (purchase order number)	Select the related ad hoc document.
	Select to access the related document where you can view and maintain the document details.
<b>Internal</b>	Displays whether the document is for internal use only. This value is based on the <b>Internal Document</b> check box on the Document Type page. If the check box is selected, a check mark appears in the <b>Internal</b> field.
<b>Document Status</b>	Displays the current status of the related document, regardless of the status it was at when it was added as a related document.

## Sending Documents to Internal and External Contacts

### Pages Used to Send Documents to Internal and External Contacts

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Internal Contacts List Page</u>	CS_DOC_INT_CONT_SP	Maintain internal contacts.
<u>External Contacts Page</u>	CS_CONTACT_SEC	Maintain external contacts.
<u>Send to Contacts Page</u>	CS_DOC_DSPTCH_SEC	Send documents to contacts.

## Understanding External Contacts

The External Contacts feature supports collaboration with external system users. It enables you to send a copy of the document using email to external contacts, such as a supplier during the Draft stage, and for final dispatch prior to executing the document. The supplier can update the document with revisions or suggested changes that the organization's buyers or contracting officers can review. The buyer can



accept or reject those changes and propose further changes to the supplier in an iterative process until both parties have agreed upon a final version. When collaboration through email is complete, you can dispatch and execute the document.

When you send documents to external contacts, the file format is by default in Microsoft Word XML Document. Suppliers must use the same Microsoft Word version to make edits directly in the version of the contract that is sent to them. If the external contract does not have the same Microsoft Word version, the document can be sent as a .doc-formatted Microsoft Word document. The external user can make edits and send the document back to you. You will have to manually enter any returned supplier edits in the document.

You can also send attachments with the documents you send to external contacts. The system sends the attachments in their program format. For example, you can send Microsoft Excel spreadsheets or Adobe documents in their native format and the contact can open and review the attachments.

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**Warning!** When you compare Microsoft Word documents, you do not use comparisons within the current document. For contract modifications in previous Microsoft Word versions, all internal custom tags do not exist and so accepting comparisons with a Microsoft Word version deletes custom tags. This causes the document and clauses to be unrecognizable in the PeopleSoft system.

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## Related Links

[Setting Up Document Comparison and Rendering](#)

[Understanding Microsoft Word Integration with Supplier Contract Management](#)

## Internal Contacts List Page

Use the Internal Contacts List page (CS\_DOC\_INT\_CONT\_SP) to maintain internal contacts.

Navigation:

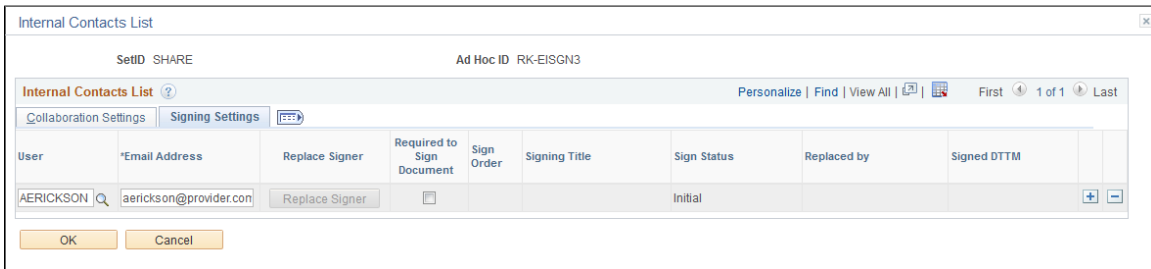
**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Internal Contacts** link on the Document Management page.

This example illustrates the fields and controls on the Internal Contacts List page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Internal Contacts List' page. At the top, it displays 'SetID SHARE' and 'Ad Hoc ID RK-EISGN3'. Below this is a navigation bar with 'Internal Contacts List' and 'Personalize | Find | View All | [Print] | [Refresh]'. There are also 'First', '1 of 1', and 'Last' navigation buttons. Below the navigation bar are tabs for 'Collaboration Settings' and 'Signing Settings'. The main content is a table with the following columns: 'User', 'Description', 'Collaborator', 'Edit/ Check In', 'Collaboration Status', and 'Collaborated On'. The table contains one row with the following data: 'AERICKSON', 'Arthur Erickson', a checkbox, a checkbox, 'Initial', and a '+' button. At the bottom of the table are 'OK' and 'Cancel' buttons.

User	Description	Collaborator	Edit/ Check In	Collaboration Status	Collaborated On
AERICKSON	Arthur Erickson	<input type="checkbox"/>	<input type="checkbox"/>	Initial	<input type="button" value="+"/>

This example illustrates the fields and controls on the Internal Contacts List page. You can find definitions for the fields and controls later on this page.



<b>Field or Control</b>	<b>Description</b>
<b>User</b>	Enter the user ID that you want to define as collaborator/ internal user for this document.
<b>Email Address</b>	Enter the email address of the internal user.  This field is required if you are using the <b>Adobe Document Cloud eSign services</b> signature method.
<b>Collaborator</b>	Select to indicate that the user is a collaborator for this document. During document reviews, collaborators can view the document and make comments; however, unless they have been authorized, they cannot edit the document.
<b>Edit/Check In</b>	Select to indicate that this collaborator can edit this document during the collaboration process. If collaborators can edit the document, then they can check out the document and enter their changes.
<b>Collaboration Status</b>	Displays the current internal collaboration status for this document. Internal collaboration statuses include Pending Collaboration, Collaborated, Pending Review, and Collaborated. When the document completes collaboration, the field displays Collaborated and the system inserts the date in the <b>Collaborated On</b> field.
<b>Collaborated On</b>	Displays the date on which the document completed internal collaboration.

## Signing Settings

Use this tab to set up digital signature information for internal users. The tab is only available when the **Enable Internal Signatures** option is selected on the Installation Options page.

<b>Field or Control</b>	<b>Description</b>
<b>Replace Signer</b>	Click to replace the signer if the signing status of the document is still pending.
<b>Required to Sign Document</b>	Select this option to indicate that this internal user is required to sign any contract documents created by the current user ID.
<b>Sign Order</b>	Enter a numeric value that indicates the order in which the user will sign the document. The system uses this value to sequentially route the document to the signers when it routes the document for signatures.
<b>Signing Title</b>	Enter a job title that describes the collaborator's position related to the contract document.
<b>Sign Status</b>	Displays the status related to whether a signer has signed a document. Values include: <ul style="list-style-type: none"> <li>• <i>Initial</i></li> <li>• <i>Signed</i></li> <li>• <i>Pending Signature</i></li> <li>• <i>Replaced by Alternate</i></li> <li>• <i>Signed by Proxy</i></li> <li>• <i>Marked as signed</i></li> <li>• <i>Declined</i></li> </ul>
<b>Replaced By</b>	If replacing a signer, this field displays the new signer name.
<b>Visible Signer</b>	Select this check box to indicate that this user is a visible signer. A visible signer must provide a visible electronic form of their handwritten signature on the contract paper-based document. An invisible signer is a signer whose digital signature is not actually visible on the contract document. The invisible signer signature serves mainly as a security indicator that the user has verified the contents of the document.
<b>Signed DTTM</b>	Displays when the document was signed.



on this page is associated with system bind variables that are predefined so that the bind can be included as content in the document when you generate the document.

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**Note:** If you do not select a value in the **External User** field, you must enter a name in the **Contact Name** field. When you only enter a name, the **Allow Document View Access** and **Primary Document Owner** check boxes will not be available. This enables the system to track and control external users who are authorized to view and own documents.

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This page appears based on whether the document is an ad hoc document or a purchasing contract document. For purchasing documents, the page includes the supplier location for that contract. It also includes an **Update From Supplier - Contacts** button that enables you to insert a supplier contact who has been identified as a contract collaborator using the Contacts page in the Supplier component. The system uses the contract's most current active row to select the contact. If the most current row is inactive, the system does not insert the contact as a default value on this page.

To support updating supplier contacts, a contact type of *Contract Collaborator* is available on the Contacts page. To access the page, select **Suppliers > Supplier Information > Add/Update > Supplier > Contact**.

<i>Field or Control</i>	<i>Description</i>
<b>Contact ID</b>	Displays the system-assigned number that uniquely identifies this external contact. As you add contacts, the number is increased by one.
<b>Allow Document View Access</b>	Select to provide this external user with view access to documents associated with this contract. You use the <b>Document View Access</b> link on the Document Management page to authorize internal users to view documents.
<b>Primary Document Owner</b>	Select to indicate that this external user is the primary document owner for all online external collaborations and approvals for documents associated with this contract. This check box becomes available after you select a user ID.  The system verifies that there is only one external user defined as the primary document owner. If there is another primary document owner defined for the contract, the system displays a warning message. To override a previously defined primary document owner, select the check box.
<b>Required to Sign Document</b>	Select to indicate that this external user is required to provide a digital signature for documents associated with this contract. The field is available when you select the Enable External Signatures check box on the Installation Options page.

## Send to Contacts Page

Use the Send to Contacts page (CS\_DOC\_DSPTCH\_SEC) to send documents to contacts.

Navigation:

Click the **Send to Contacts** button on the Document Management page.

Information on this page is similar to the information that is shown for dispatching documents. The difference is that sending documents to contacts is intended for collaborative development of the contract with external parties and can be performed multiple times as required, whereas dispatching is intended for the final submission of the documents for signing and execution for the original contract and any amendments.

If you want to send related documents to contacts, you must be using document types that use applicable statuses of *Draft, Complete Statuses Only* and *Draft, Approve Statuses Only*. Then, documents that you create using those applicable statuses can be sent as related documents. The system prevents you from selecting to send documents that have their own dispatch setup.

**Related Links**

[Dispatching Documents](#)

## Granting Document View Access

### Page Used to Grant Document View Access

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Document Access Page</a>	CS_DOC_ROLE_ACCESS	Grant view access.

### Document Access Page

Use the Document Access page (CS\_DOC\_ROLE\_ACCESS) to grant view access.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Document View Access** button on the Document Management page.

Use this page to provide viewing permissions for internal users and to review collaborators who have view permissions for this document. This enables you to associate view access roles for the document to enable broader user access to certain documents. Document administrators can also predefine a default set of roles so that certain roles can be supplied by default to newly generated documents automatically. You assign user permissions based on the user's role. Use the **Role Name** field to select the roles. Users with this role can only view the document. They cannot edit the document.

The system automatically updates the **Collaborator Users with View Access** grid with values from the **Role Level View Access** grid on the My Internal Contacts/Collaborators page. In addition, if document types are enabled, the system uses the view access information that is specified for the document type when you generate the document.

# Dispatching Documents

## Pages Used to Dispatch Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Dispatch Page</a>	CS_DOC_DSPTCH_SEC	Dispatch documents to contacts.
<a href="#">Document Management Page</a>	CS_DOC_MAINT	Reset documents to dispatched. See <a href="#">Resetting Documents to Dispatched Using the Document Management Page</a>

## Understanding Document Dispatch

Dispatching a document is the process of formally distributing and recording the distribution of ad hoc, purchase order contract, and purchasing contract documents and, when appropriate, their amendments and attachments. You dispatch a document to obtain the signatures of external contract participants. While you can send documents to contacts for collaboration and review throughout their life cycles, you should perform this action each time that you intend to obtain a formal document for the original contract and each amendment. After a document status becomes Dispatch, the next available status is Executed that indicates the version of the document has been signed by all parties.

The dispatch process provides a structure to store external contact information and methods for sending documents using email or manual methods. The process also records the dispatch and updates the status when the document is dispatched for signatures. When email deliveries are not available, the process enables you to record dispatch activities when you send the document out using other manual processes, such as mail or facsimile.

When the system dispatches a document, it updates the document history to indicate that the document has been sent and records any status changes. It stores the process options history, which you can view using the **Document Version History** link on the Document Management page.

## Dispatch Page

Use the Dispatch page (CS\_DOC\_DSPTCH\_SEC) to dispatch documents to contacts.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management** . Click the **Dispatch** button on the Document Management page.

This example illustrates the fields and controls on the Dispatch page (1 of 2). You can find definitions for the fields and controls later on this page.

### Dispatch

SetID: SHARE Contract ID: 000000000000000000000000000048  
 Vendor: Midtown Computer Supplies

---

Version: 0.01  
 Amendment: 1  
 Administrator: Kenneth Schumacher  
 Email: peoplesoft@peoplesoft.com  
 \*Delivery Method: Email  
 Send as File Type: Adobe PDF Preview PDF

#### Files To Be Sent

- Original Executed Document
- Current Document
- Amendment Files
  - Most Recent Only
  - All
- Attachments
- Related Documents

---

- Set to Checked Out
- Send Copy to Administrator

Subject  
Documents for Review/Signature - Contract ID: 000000000000000000000000000048

Description:  
This email contains documents for contract: SHARE / 000000000000000000000000000048.

Contacts <span style="float: right;">Customize   Find   First 1 of 1 Last</span>						
Selected	Contact ID	Name	Title	Email ID	Description	
<input checked="" type="checkbox"/>	1	James Scott	Sales Manager	jscott_midtown@yahoo.com	Vendor Contact	+

This example illustrates the fields and controls on the Dispatch page (1 of 2). You can find definitions for the fields and controls later on this page.

Contacts <span style="float: right;">Customize   Find   First 1 of 1 Last</span>						
Selected	Contact ID	Name	Title	Email ID	Description	
<input checked="" type="checkbox"/>	1	James Scott	Sales Manager	jscott_midtown@yahoo.com	Vendor Contact	+

[Select All Contacts](#)   [Clear All Contacts](#)

Attachments <span style="float: right;">Customize   Find   First 1 of 1 Last</span>						
Files <span style="float: right;">Description</span>						
Selected	Origin	Comment Type	File Name	Title	View	
<input checked="" type="checkbox"/>	Document		SHARE_000000000000000000000000000040_0.00.xml	Support Document	<a href="#">View</a>	

Related Documents <span style="float: right;">Customize   Find   View All   First 1 of 1 Last</span>						
Selected	Source Transaction	Related Documents	Document Status	Version	Amendment	Document State
<input type="checkbox"/>	Ad Hoc	<a href="#">SHARE / ADH000000000000000000000000000001</a>	Draft	0.00		Active

OK   Cancel

Use this page to dispatch documents and their amendments and attachments. Depending on the type of document that you are dispatching, the page displays the **Ad Hoc ID**, **Contract ID**, or **PO ID** (purchase order ID) field.



<b>Field or Control</b>	<b>Description</b>
<b>Supplier</b>	Displays the supplier on the purchasing contract.
<b>Version</b>	Displays the version of the document.
<b>Amendment</b>	Displays the number of amendments belonging to this purchasing contract or ad hoc document.
<b>Administrator</b>	Displays the administrator.
<b>Administrator Email ID</b>	Displays the email address for the administrator.
<b>Delivery Method</b>	<p>Select to determine how to send the document to the contact. The contact can be an external or internal contact. Methods are:</p> <p><i>Email:</i> Select to indicate that the document and notification will be sent by email. When you select email, the system populates the <b>Description</b> field with the SetID and document description and highlights the <b>Files to Be Sent</b> grid. If you select this option, you must enter at least one email address.</p> <p><i>Manual:</i> Select to manually control the delivery of the document. You can deliver the physical document by another means. This might include documents that you send by mail or facsimile.</p> <p>The system has no actions or requirements when you select this option. The manual process implies that the document has been provided to one or more of the contacts that are listed on the External Contacts page. When you select <i>Manual</i>, the system disables the contacts list and the <b>Files to Be Sent</b> field. You can indicate that the document has been checked out for their review, but you cannot send a copy to the administrator.</p> <p><i>Email and Online Signatures:</i> Select to indicate that the document needs to be signed by the supplier online instead of using the Supplier Portal. This option locks the document until the external contact responds back using the Supplier Portal or the document check out is cancelled by the document administrator.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Send as File Type</b>	<p>The file type is the application format that you use as the basis to dispatch a document.</p> <p>Values include:</p> <ul style="list-style-type: none"> <li>• <i>Adobe PDF Format</i>: Select to send the file in an Adobe Acrobat PDF format.  See <a href="#">Understanding Digital Signatures</a>.</li> <li>• <i>Word XML</i>: Select to send the document by email in a Microsoft Word .xml format.  See <a href="#">Installing and Configuring Microsoft Word Components on Devices</a>.</li> <li>• <i>Word Document</i>: Select to send the document by email in a Microsoft Word .doc file format. This is for use with contacts who might not have Microsoft Office Open XML available, but still want to view the document. Any edits will have to be manually entered into the Microsoft Word .xml file. This option only appears if you have selected the <b>Enable Rendering .doc</b> check box on the Installation Options - Supplier Contracts Management page.  See <a href="#">Understanding Digital Signatures</a>.</li> </ul>
<b>Preview PDF</b>	Click to preview the document in a PDF format. The system launches a new page and displays the document with any edits.
<b>Subject</b>	Displays a system-generated description of the document to be reviewed.
<b>Description</b>	Displays a system-generated description of the document when you send the document to contacts by email. The description is made up of the SetID and document description. You can enter additional information in the field. The system uses the field values as the body of the email message that it sends.

### Files to Be Sent

Use this group box to define which files the system should include when you send the document by email. You must select at least one file or the system displays an error message when you send the notification. The file list changes depending on the context of the dispatch. For example, amendment file options are included only if the document is in an amendment cycle. The system disables all fields in this box if you are manually routing the files.

<b>Field or Control</b>	<b>Description</b>
<b>Original Executed Document</b>	Select to send the original document. This option is available when you are sending separate amendment files, which include files for the amendment process options Amend Contract with Amendment Files and Amendment Files Only, and you also want to send the originally executed document for informational purposes.
<b>Current Document</b>	Select to send the current document to contacts. This option applies for dispatching the current version of the original contract, or the current version of the edited main document during an amendment cycle and when the amendment process option is Amend Contract with Amendment Files.
<b>Amendment Files</b>	Select to route separate amendment files that are associated with the document. This option applies when an amended contract is being dispatched and the amendment process option is Amend Contract with Amendment Files or Amendment Files Only. When you select this option, the system enables additional selections for sending amendments.
<b>Most Recent Only</b>	Select to send only the most recent amendment file with the email. The system does not send any previous amendment files.
<b>All</b>	Select to send all amendment files with this email. This includes all amendment files for all past amendment cycles.
<b>Attachments</b>	Select to include the attachments for this document in the email. If the attachment has been selected for external use, this check box is enabled. If the <b>External</b> option has not been selected on the Attachments page, then the check box will not be available on this page. After you select the Attachment check box, the system enables the <b>Attachment</b> grid so that you can select individual attachments.
<b>Related Documents</b>	Select to include related documents in the email with this document. Related documents are those documents that have been created or imported into the document management system. If you attempt to select a related document that has its own dispatch setup, the system prevents the selection. You can attach only related documents that have a document type that uses these applicable statuses: <i>Draft, Complete Statuses Only</i> and <i>Draft, Approve Statuses Only</i> .

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Set to Checked Out</b>	<p>Select to set the document to checked out when you send the notification. When you select this option, the system displays this message on the Document Management page: <b>File locked for external review</b>. This option prevents other users from editing the document while the contacts are reviewing it. This field is available for email and manual notifications.</p> <hr/> <p><b>Note:</b> When you select this check box, the document is marked as checked out to you on behalf of the supplier so that other edits cannot be made while it is being reviewed by external contacts. You can email the latest version of the contract at the time of dispatch. When you receive the supplier comments, you can cancel the checkout and check out the current document to incorporate any supplier changes.</p> <hr/>
<b>Send Copy to Administrator</b>	<p>Select to indicate that this notification and document should go to the contract administrator or owner. If the administrator does not have a valid email address, the system displays a warning.</p>

## Contacts

Use this grid to add contacts for this email routing. The grid initially appears with default contacts that are defined for this document, but you can add additional contacts by clicking the **Add** button. Use the **External Contacts List** link on the Document Management page to define default document contacts. The grid is not available if you are sending documents using a manual process.

You can also select to send the email to all contacts or clear all contacts and select only those contacts to whom you want to send the email.

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Selected</b>	<p>Select these check boxes to mark contacts to whom you are sending the routing. You must select one contact. You can use the <b>Select All</b> and <b>Clear All</b> links to select multiple contacts.</p>
<b>Contact ID</b>	<p>Displays the system-defined sequence number for the contact.</p>
<b>Name</b>	<p>Displays the person to whom the email will be sent containing the dispatched document and any attachments and related documents that you select.</p>
<b>Title</b>	<p>Displays the position that is defined for contact.</p>

<i>Field or Control</i>	<i>Description</i>
<b>Email ID</b>	Displays the email address for the contact.
<b>Description</b>	Indicates the origin of the contact. For example, you can add ad hoc contacts for a document or use contacts that are pulled from the Supplier component's Contacts page. This is applicable only if the document is tied to a purchasing contract transaction. The description values are <i>Ad Hoc Contact</i> and <i>Supplier Contact</i> .

## Attachments

This grid displays the attachments that will be sent to contacts along with the document. The **Selected** check boxes are available and selected as the default value when you select the **Attachments** check box in the **Files to be Sent** group box.

The **Origin** field indicates how the attachment was added to the document. If the attachment was attached to the purchasing contract, the field contains the value *Purchasing Contracts Only*. If the attachment was added using the authoring system, the field displays *Doc Management*. If you add attachments from within contract entry and then create a document, the system makes the attachments available for the Dispatch process.

The system displays the **Comment Type** field, which is information that is specific to the purchasing contract attachments. Click the **View** link to open the attachment as a read-only file.

## Related Documents

This grid displays the related documents that will be sent to contacts along with the document. The **Selected** check boxes are available and selected as the default values when you select the **Related Documents** check box in the **Files to be Sent** group box.

To view the document, click the document link. The document's source transaction, version, approval status, and state also appear. And, if the document has been amended, the number of amendments appear.

## Related Links

[Viewing and Uploading Attachments and Related Documents](#)

## Resetting Documents to Dispatched Using the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to reset documents to dispatched.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management**

Click the **Reset to Dispatch** button on this page to set the executed document's status back to Dispatched. This enables you to edit the document and send it to contacts for further review and updates. When you

click the button, the system updates the Document Management page with the **Send to Contacts** and **Execute Contract** buttons. This enables you to resend the document for additional reviews or to edit the document.

## Executing Documents

### Page Used to Execute Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Document Management Page</u>	CS_DOC_MAINT	Execute documents. See also,

### Executing Documents Using the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to execute documents.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management**

Click the Execute Contract button to formalize the completion of the contract. An executed contract is one that has been through all of the collaboration and approval and the owner has determined that it is ready for use in managing contracts with suppliers.

When you execute the document, the system also provides additional methods of maintaining the contract in case changes occur. The system provides an option to send the contract back to Dispatched status. If an amendment is required, the system provides a method for creating and processing the amendment through its life cycle.

## Comparing Documents

### Page Used to Compare Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Compare Documents Page</u>	CS_DOC_COMPARE_SP	Compare documents.

### Understanding Document Comparisons

Document comparisons enable you to view a comparison of the current document with another temporary version of the document. The temporary version provides you a preview of changes that will occur in a document before you actually make the decision to re-create or refresh the document. You cannot edit the temporary version. Based on the options that you select to compare, the file that the system opens is exactly what you would view if you did a manual Microsoft Word compare between the two specified

types of files. The system automatically runs the Microsoft Word compare in the background and shows you the result of that comparison.

The Compare feature is useful if you want to view what changes you might lose if you refreshed or re-created the document. For example, some manual edits could be lost based on refreshing or re-creating the document. Or you can view what new transactional data changes you might gain by refreshing or re-creating the document. You can also compare the current document with the last-executed document to see what changes have been made since the last time the document was approved and executed.

You use installation options to enable document comparisons. You must also prepare the system to use the compare feature.

## Related Links

[Setting Up Document Comparison and Rendering](#)

## Compare Documents Page

Use the Compare Documents page (CS\_DOC\_COMPARE\_SP) to compare documents.

Navigation:

**Supplier Contracts >Create Contracts and Documents >Document Management.** Click the **Compare Documents** button on the Document Management page.

Use this page to select which version of a document you want to compare with a current document. The document that you open using the Compare feature is a temporary Microsoft Word file. This means that you cannot edit and upload the document. However, you can use the document to copy text to another document.

You use the **Compare Against** field to select which type of comparison you want to make.

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Recreated Document</b>	Click to compare the current document with a temporarily re-created version of the document. It presents a temporary document as though it has been re-created and compares it with the current version to help you identify the differences. You cannot edit and upload this resulting compared output file.
<b>Refreshed Document</b>	Click to compare the current document with a temporary refreshed version of the document. It presents a temporary document as though it had been refreshed and compares it with the current version to help you identify the differences. You cannot edit and upload the resulting compared output file.

<b>Field or Control</b>	<b>Description</b>
<b>Last Executed Document</b>	Click to compare the current document against the last-executed document. The system displays this option only during amendment cycles. It presents a temporary document that is a comparison between the current version and the last-executed version to help identify the changes that were made since the last document execution. The button is not available initially because the document has not been executed. You cannot edit and upload the resulting compared output file.

**Note:** In addition to this compare capability, you can also select any two Microsoft Word document versions, within document history, and run a comparison.

**Related Links**

[Understanding Document Comparisons](#)

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## Using Document-Related Pagelets

Supplier Contract Management provides employee- and supplier-facing pagelets that collaborators, document administrators, and suppliers can use to view documents. You can select to display the pagelets using the Content link on the Home page. See "PeopleSoft Financials, ESA, ALM, and SCM Portal Packs Overview" (PeopleSoft Financials, ESA, ALM, and SCM Portal Packs).

## Pages Used With Document-Related Pagelets

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
Documents Pending Action (Internal)	CS_DOC_PND_PGLT	View a list of contract documents that are pending your check in, review, approval, or signature. Documents are sorted by the cycle due date, created date, and amendment created date. This is a general pagelet that is intended for any administrator or frequent contract collaborator.
Documents by Due Date (Internal)	CS_DOC_DUE_PGLT	View a list of the most recent upcoming documents sequenced by due date. The pagelet includes documents due for you as an administrator, as well as other administrator's documents for which you have authorized document access. Only documents with an assigned cycle due date are shown on the pagelet.



<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
Documents Pending Review (External)	CS_SUPP_PEND_PGLT	View a list of documents that are pending your review for collaboration or signature. This is an external supplier-side pagelet intended for use with a supplier-facing portal. When a document is routed for external collaboration or sent for online signatures, the document is shown on this pagelet for the external user who needs to collaborate or sign the document.

## Deactivating and Reactivating Documents

### Page Used to Deactivate and Reactivate Documents

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Document Management Page</u>	CS_DOC_MAINT	Deactivate and reactivate documents. See <a href="#">Deactivating Documents Using Document Management Page</a> and <a href="#">Reactivating Documents Using Document Management Page</a> .

### Deactivating Documents Using Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to deactivate documents.

Reactivate documents that have been deactivated.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management**

When you click the **Deactivate Document** button, the system removes the document from general use. This means that you cannot select the document or perform actions against it unless you reactivate it. The system records the deactivation in the version history.

Elements of the document, such as its clauses, amendments, and attachments, remain associated with the document. The system leaves the document status at its current status when you deactivate it and displays an indicator that the document has been deactivated. If you reactivate the document, the document is activated with the same status.

You can access a deactivated document through the search utility. Use the **Document Status** field to search for *All Documents* or *Inactive Documents Only*. Select the deactivated document. After you access the Document Management page, you can reactivate the document.

## Reactivating Documents Using Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to reactivate documents that have been deactivated.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management**

You can reactivate a document after it has been deactivated. To reactivate a document:

1. Locate the deactivated document using the search utility.
2. Select the document.
3. Click the **Reactivate Document** button.

The system activates the document at the same status that it was at when it was deactivated.

### **Related Links**

[Understanding Microsoft Word Document Generation](#)

# Performing Searches in Supplier Contract Management

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## Understanding Contract Library Searches

You can use the PeopleSoft Search Framework search index for searches in the contract library. PeopleSoft Search Framework searches enable you to search the content of clauses, sections, and current documents. For example, you can use PeopleSoft Search Framework searching to search for clauses and sections by content while creating document configurators. You can also perform PeopleSoft Search Framework searches for content in imported documents and for specific document types.

You perform PeopleSoft Search Framework searches using the Search Contents menu option to set up and to perform the searches. If you do not enable PeopleSoft Search Framework searching, you can still use standard PeopleSoft search pages and prompts for clauses, sections, and rules for searching. However, without PeopleSoft Search Framework searches, you cannot search content such as clause text or the text within a document.

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## Understanding PeopleSoft Search Framework and Where-Used Searches

This topic provides an overview of the search types used in Supplier Contract Management components and discusses:

- PeopleSoft Search Framework.
- Keyword searches in the Document Management component.
- Keyword searches in the Manage Contract Library component.
- Searches in the Search Content component.
- Where-used searches.

## Understanding the Search Types Used in Supplier Contract Management Components

The Supplier Contracts menu has these areas from which you can perform searches:

- Create Contracts and Document, Document Management.
- Mange Contract Library.

- Search Content.

Each area uses one of these types of searches:

- PeopleTools real-time search.

This type of search is represented by search dialog pages, SQL based where-used search, or both.

- PeopleSoft Search Framework.

This type of search is based on search indexes that are built at a particular point in time.

This example illustrates the menu options in the Supplier Contract Management menu.



This list highlights the menu options where you can search using PeopleSoft Search Framework:

- Within the Create Contracts and Documents, Document Management menu option, you can perform real-time and keyword searches.
- Within the Manage Contract Library, you can perform real-time and keyword searches on the Clauses and Sections menu options.
- Within the Search Content, Search Content menu option, you can search using PeopleSoft Search Framework and where-used searches.
- Within the Supplier Contract Workbench, you can search using PeopleSoft Search Framework.

## PeopleSoft Search Framework

PeopleSoft Supplier Contract Management uses PeopleSoft's Search Framework to assist in advanced, text-based searches for elements in the library and in current authored contracts. You enable search content by creating or updating search indexes. The system creates these indexes by extracting current information and key values from the PeopleSoft database using the Search Definitions loaded in the PeopleSoft Search Framework. The system then searches for library contents using PeopleSoft's Search Framework advanced searching.

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**Note:** PeopleSoft delivers predefined metadata (also known as search definitions) for setting up PeopleSoft's Search Framework searches in PeopleSoft Supplier Contract Management. The search definitions are for clauses, sections, document configurators, and current authored documents. These search definitions contain field mappings, security considerations, and pre-/post-processing information for the indexes.

The system stores the most current .xml version of each source transaction contract for searching purposes and generates the PeopleSoft's Search Framework indexes directly from the Microsoft Word .xml file and any other attachments to the contracts.

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In PeopleSoft Supplier Contract Management, searches using PeopleSoft Search Framework include content type and individual object maintenance searches. You can perform searches for authored documents, clauses, sections, and document configurators. You can also search for ad hoc, purchase order, purchasing contracts, and sourcing events that include text strings in full-text and object-specific searches, such as searching transactional contracts containing a specific item category or searching for specific text in a contract. After completing a search, you can review the results and then, depending on the context, select an object that meets the search attributes to use, update, view, or perform where-used searches.

While you can further configure PeopleSoft Search Framework searches, this topic only describes tasks that you need to perform with predefined PeopleSoft Supplier Contract Management search categories. These tasks define specific fields to store in the search index and to build and test the index.

See the product documentation for *PeopleTools: System and Server Administration*,

## Related Links

[Setting Up and Building Search Indexes](#)

## Keyword Searches in the Document Management Component

You can perform keyword searches within the Document Management component, which uses PeopleSoft Search Framework. For additional information, see the [Keyword Search for Documents Page](#).

## Keyword Searches in the Manage Contract Library Component

When you maintain clauses, sections, and configurators, it can be useful to perform searches for other elements in the library. The system allows searching directly from within various components, so you can search and retrieve elements to complete the maintenance of another element. For example, using a document configurator, you can invoke a search to identify a list of clauses containing specific text. and then one or more of the resulting clauses to the configurator you are defining.

The searches available from within maintenance components are in the context of the object you are maintaining. In these cases, the system restricts the content type translation values to certain content types. For example, searching for a contract line agreement is limited to a clause search because you can only associate clauses with contract agreements. However, a section search can include clauses and sections.

## General Searches

These contract maintenance definitions allow object maintenance searches where you are using the PeopleTools real-time search logic:

- Clause definition - The system searches for clauses only.

You access this search for populating dependent clauses.

- Section definition - The system searches for clauses and sections.

You access this search to populate the Section Structure grid of a section.

- Rule definition - The system searches for clauses and sections.

You access this search to populate clauses or sections to include when a rule renders as true.

- Document configurator definition - The system searches for clauses and sections.

You access this search to populate sections or clauses to include on the configurator.

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**Note:** Rules are not included in the contents search; however, you can select *Rule* from a list of values for content types. Then, you can search for a rule to include in the clause, section, or configurator.

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- Contract agreement setup - The system searches for clauses.
- Contract header agreement definition - The system searches for clauses.
- Contract line agreement definition - The system searches for clauses.
- Wizard question group definition - The system searches for clauses.

## Keyword Search

These contract maintenance definitions allow object maintenance searches where you are using the PeopleSoft Search Framework Keyword search logic:

- Clause definition.
- Section definition.

When the indexes are built for Clause and Section component search, a Keyword Search tab appears on the Clauses and Sections search pages in the Manage Contract Library component. The Keyword Search tab is provided by PeopleTools when it detects that a PeopleSoft Search Framework index has been built for the relevant component. Keyword search enables you to search across multiple attributes to find a particular term that is associated with clauses and sections. In addition, you can search a particular attribute for a specific term. A basic search and an advanced search page are associated with keyword searching.

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**Note:** Keyword search is not real-time in that the data presented is as current as the last incremental or full index build.

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## Searches in the Search Content Component

Content searches enable you to search the library, view search results, perform additional where-used searches, and update or view the elements using PeopleSoft. In addition, you can perform searches from within various Supplier Contract Management maintenance components for clauses and sections, which is discussed in the [Keyword Searches in the Manage Contract Library Component](#) section, and from the Document Maintenance component, which is discussed in the [Keyword Searches in the Document Management Component](#) section.

You can search across documents in any status or stage in the document life cycle. A search can also be limited to certain transactional field values. For example, you can search across all contracts that involve an item category of computer hardware, remaining contract amounts, and contract default ChartFields.

Content-based searches include the capability to search for a text string across multiple source transactions at one time. You can search for attachments that might include supplier papers, Adobe .pdf files, or Microsoft Excel spreadsheets. Finally, you can perform content-based searches for document types, user-defined fields, and imported documents.

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**Note:** If you are using transactional data, such as item or supplier information that appears as bind values in a document, and you change the transactional data and do not update the document, then PeopleSoft Search Framework text searches will not find the changes.

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## Related Links

[Searching for Library and Document Contents](#)

## Where-Used Searches

In addition to using the [PeopleSoft Search Framework](#) feature to search for content within document library elements, the where-used functionality enables you to search and identify document elements. For example, you can use the Where-Used feature and the PeopleSoft Search Framework feature together by first using PeopleSoft Search Framework searches to identify specific clauses that might contain specific text that you need to edit. Then you can search for sections, configurators, and documents. You can access where-used searches from multiple locations, including the Search Contents component and individual definitional components for clauses, sections, binds, rules, document configurators, question groups, and wizards. Where-used searches are performed using PeopleSoft structured query language and they are not dependent on PeopleSoft Search Framework.

Using maintenance components, you can perform where-used searches for a bind variable, clause, document, document configurator, question group, rule, section, and wizard definition. In addition, after searching for a content type and receiving the search results within an PeopleSoft Search Framework contents search, you can perform a where-used search on specific objects in the results. For example, if you search content type by clause, the system presents a list of clauses, each with a **Where Used** link. From within the search results, you can click the link to access each instance of a clause's use, such as in a section or configurator. The system displays where-used searches as a hyperlink or an icon, such as in a grid.

Where-used functionality appears in these areas:

- Clause definition.
- Section definition.
- Bind definition.
- Rule definition.
- Document configurator definition.
- Question group definition.
- Wizard definition.

- Word template.
- Related documents.

**Related Links**

[Performing Where-Used Searches](#)

## Setting Up and Building Search Indexes

### Pages Used to Set Up and Build Search Indexes

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Search Definition Page</a>	PTSF_SEARCH_DEF	Locate predefined search indexes or create new search indexes.
<a href="#">Build Search Index Page</a>	PTSF_SCHEDULE_SI	Build contract search indexes.

### Search Definition Page

Use the Search Definition page (PTSF\_SEARCH\_DEF) to locate predefined search indexes or create new search indexes.

Navigation:

**Supplier Contracts > Search Content > Search Definition.**

**PeopleTools > Search Framework > Designer > Search Definition.**

You can also use this page to define a new search index and a specific query data for use with the index. You can define specific fields that the system will store in the search index. This search retrieves and processes data from a group of records that have multilevel parent and child relationships.

**Note:** For ChartField searches, if you have customized ChartFields you may need to customize PeopleSoft Search Framework setup information to include ChartField changes in the Search Framework collection so they can be searched on.

PeopleSoft Supplier Contract Management provides predefined search indexes for contract library elements and current transactional and ad hoc contracts in the system. Use the **Search Index Name** field to select a search index. System-supplied supplier contract field values are:

- Section search fields:
  - *EP\_CS\_SECTIONS*
  - *EP\_CS\_SECTIONS\_EFFDT*
- Clause search fields:



- *EP\_CS\_CLAUSES*
- *EP\_CS\_CLAUSES\_EFFDT*
- Document configurator search field: *EP\_CS\_CONFIGURATORS*.
- Ad hoc, purchase order, purchasing contract, and sourcing document:
  - *EP\_CS\_DOC\_ADHOC* search fields.
  - *EP\_CS\_DOC\_CONTRACTS* search fields.
  - *EP\_CS\_DOC\_PURCHORDRS* search fields.
  - *EP\_CS\_DOC\_SOURCING* search fields.
  - *EP\_CS\_DOCUMENTS* search category.
  - *EP\_CS\_AUTHORED\_DOCS* search category.
  - *EP\_CS\_CWB\_ALL\_SOURCE* search category. (Supplier Contract Workbench search)
  - *EP\_CS\_CWB\_ADHOC* search category. (Supplier Contract Workbench search)
  - *EP\_CS\_CWB\_CONTRACTS* search category. (Supplier Contract Workbench search)
  - *EP\_CS\_CWB\_PO* search category. (Supplier Contract Workbench search)
  - *EP\_CS\_CWB\_AUC* search category. (Supplier Contract Workbench search)
  - *EP\_CS\_CWB\_ADHOC* search field. (Supplier Contract Workbench search)
  - *EP\_CS\_CWB\_CONTRACTS* search field. (Supplier Contract Workbench search)
  - *EP\_CS\_CWB\_PURCHORDERS* search field. (Supplier Contract Workbench search)
  - *EP\_CS\_CWB\_SOURCING* search field. (Supplier Contract Workbench search)

---

**Note:** Indexes with the prefix '*EP\_CS\_DOC*' need to be built before indexes with the prefix '*EP\_CS\_CWB*.' Otherwise, the search engine may return incorrect results.

---

## Build Search Index Page

Use the Build Search Index page (PTSF\_SCHEDULE\_SI) to schedule and build search indexes for Supplier Contract Management.

Navigation:

**Supplier Contracts >Search Content >Schedule Search Index**

This example illustrates the fields and controls on the Build Search Index page.

The screenshot shows the 'Build Search Index' page with the following fields and controls:

- Run Control ID:** EP\_CS\_DOC\_CONTRACTS\_FULL
- Report Manager:** Report Manager
- Process Monitor:** Process Monitor
- Run:** Button
- \*Search Definition:** EP\_CS\_DOC\_CONTRACTS
- Indexing type:**
  - Full index
  - Incremental Index
- Language Option:**
  - Base Language
  - All Languages
- Full Indexing Criteria:**
  - Index Only Last: 0 Days
  - Index Start Date: 01/01/1900
- Previous schedule details:**
  - Previous schedule status: Success
  - Last Successful Index Built On: 11/13/2013 11:55:09AM
  - AE Status: Schedule success
  - Details:**
    - Feed generation status: Done
    - Process Instance: 16970 [Message Log](#)
    - Run Control ID: EP\_CS\_DOC\_CONTRACTS\_FULL
    - User ID: VP1
    - Indexing type: Full index
    - Language Option: Base Language
    - Generated segment count: 1
    - Segments returned to crawler: 1
    - Datetime prompt value: 01/01/1900 12:00:00.000000AM
    - [View Data Feed](#)
    - Language Code: English [View data feed](#)

Use this page to create and update the PeopleSoft Search Framework search indexes and collections to enable supplier contract content searches. The system initializes the page with values based on the index name that you select. You must create run control IDs for each search definition to build a full index and another run control ID for each search definition to build incremental indexes. It is suggested that you use the search definition name followed by *\_FULL* or *\_INCR* for each search definition. After you initially build your search indexes using the *\_FULL* run controls, you should keep them updated to reflect changes that are being made in the contract library using the *\_INCR* run controls. You should set up the *\_INCR* processes to run as frequently as needed depending on how often changes are made to the library elements and authored documents.

---

**Note:** If you use the AMC search configuration template, the run controls described above are created automatically by the system.

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**Note:** The system uses values defined on the configuration file, located on the application server, as the index file path default value.

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<b>Field or Control</b>	<b>Description</b>
<b>Run Control ID</b>	Displays the run control ID for either building or updating search indexes. You initially define the value for this field.
<b>Search Definition</b>	Select a search definition to build search indices.  For a list of Supplier Contract Management search definitions, see the <a href="#">Search Definition Page</a> .
<b>Indexing Type</b>	Select one of these options: <ul style="list-style-type: none"> <li>• <i>Full Index</i> indicates that all indexes are rebuilt.</li> <li>• <i>Incremental Index</i> indicates that only changed indexes are rebuilt.</li> </ul>
<b>Language Options</b>	Select one of these options: <ul style="list-style-type: none"> <li>• <i>Base Language</i> indicates that the base language specified on the International Preferences page is used when you create or build the index.</li> <li>• <i>All Languages</i> indicates that all activated languages on the Manage Installed Languages page are included when you create or build the index.</li> </ul>
<b>Full Indexing Criteria</b>	Displays the information entered on the Search Definition - Advanced page if you entered a start date. For more information, see the <i>PeopleTools: PeopleSoft Search Technology</i> .

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## Searching for Library and Document Contents

### Pages Used to Search for Library and Document Contents

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Search Content By Type Page (for Clauses, Document Configurators, and Sections)</a>	CS_CONTSEARCH_SES	Search content by clause, document configurator, and section. See also, <a href="#">Reviewing Document Search Results Using the Search Content By Type Page for Clause, Document Configurator, or Section Content Types</a> .
<a href="#">Search Content By Type Page (for Documents)</a>	CS_CONTNTS_DOC_SES	Search content by document. See also, <a href="#">Reviewing Document Search Results Using the Search Content By Type Page for Document Content Type</a> .

## Common Elements Used to Search for Library and Document Contents

**Note:** You can use much of the information provided in the following topics when performing PeopleSoft Search Framework searches from within library maintenance definition pages.

Depending on the content type selected, some fields may not apply.

<b>Field or Control</b>	<b>Description</b>
<b>Ad Hoc Clause Verbiage</b>	Enter the text that you want to find in a document configurator ad hoc clause. This field is available when the content type is document configurator. An ad hoc clause is one that you assign from within the configurator. The system searches through clause text to find matches.
<b>Approved Date From</b> and <b>Approved Date To</b>	Select a date range on which to search when <i>Clause</i> is selected in the <b>Content Type</b> field. You can search for when clause statuses were approved within the date range selected.  When searching for purchasing contracts, the system uses this field to search for contracts that are approved.
<b>Approval Status</b>	Select an approval status on which to search for clauses or sections. The clause approval status indicates the current state of the approval process, whereas the clause status indicates whether the clause is active or inactive. You can search on approval workflow status values such as <i>Approved</i> , <i>Initial</i> , and <i>Pending</i> . Sections do not use approval workflow, so the Pending status does not apply to sections.
<b>Checked Out By</b> , <b>Last Approved</b> , and <b>Last Updated By</b>	Select to search for clauses that are based on actions that users have taken. For example, if you want to locate clauses that are currently checked out by a user, select the user ID.
<b>Check Out Date From</b> and <b>Check Out Date To</b>	Select a date range. You can search for when clauses are still checked out by selecting from and to dates. The system displays the clauses that are checked out within the date range you select.
<b>Class Name</b>	Select a class name to include in a clause search. Clauses that use this class and that meet other search attributes will appear in the search results.
<b>Clause ID</b>	Select a specific clause for which to search. For example, you can search for all effective-dated versions that contain specific text.  The system populates the <b>Description</b> field. If the clause is assigned to a group or library, the system also populates those fields. When searching documents, a <b>Clause ID</b> field enables you to search for specific documents that use this clause.

<b>Field or Control</b>	<b>Description</b>
<b>Clause Group</b>	Select a clause group on which to search. If you entered a clause ID and it belongs to a group, the system populates this field. Search results display all clauses that are assigned to the group.
<b>Configurator Status</b>	Select a status on which to base the search. Values are <i>Available</i> , <i>In Progress</i> , and <i>Obsolete</i> .
<b>Content Type</b>	<p>Select the type of content that you want to perform searches against. This is a required field. Search attributes that the system displays depend on the content type that you select. When you select the content type and define attributes for the search, click the <b>Search</b> button to review results that match the search attributes. Field values are:</p> <ul style="list-style-type: none"> <li>• <i>Clause</i>: Select to search the contents of clauses.</li> <li>• <i>Document</i>: Select to search the contents of ad hoc, purchase order, and purchasing contract documents. In addition, when you search for purchasing contracts, you can search for some of the purchasing transaction elements, such as item category, in addition to document content.</li> <li>• <i>Document Configurator</i>: Select to search the ad hoc contents of document configurators.</li> <li>• <i>Section</i>: Select to search the contents of sections.</li> </ul> <hr/> <p><b>Note:</b> Use where-used searches to traverse the use of elements and their use. For example, to search for document configurators based on which clauses, sections, or rules are used in the configurator, you use a where-used search. You can also perform these searches from an element's maintenance component.</p> <hr/>
<b>Created Date From</b> and Created Date To	Enter a range of values on which to search for document configurators. For example, you can search for configurators that were created between June 1, 2005, and July 15, 2005.
<b>Date Range</b>	Use <b>Date Range</b> group boxes to select date ranges for when a user or multiple users took specific actions against a clause, document, configurator, or contract. An example of ranges that the system uses include status changes, check in and check out, execution, and modification dates. Depending on the attribute data that you enter, you can search for all objects that are checked out by all users during a time span or search for all objects that were checked out by a single user during a specific time frame.

<b>Field or Control</b>	<b>Description</b>
<b>Description</b>	<p>Enter text that you want to find in a clause description. You can also perform a spell check on the text you enter. When you perform the search, the system displays all clauses that use the text in the <b>Search Results</b> grid and that meet the remaining search attributes. If you enter a clause ID, the system populates this field with its description.</p>
<b>Document Search Type</b>	<p>Select the type of search you want to perform. <i>Both Authored and Imported Doc</i> is the default value for the field. Values include:</p> <p><i>Authored Documents Only</i>: Select to search for documents that were created using the document authoring system.</p> <p><i>Both Authored and Imported Doc</i>: Select to search for both the documents that were created using the document authoring system and the documents that were imported into the document authoring system as a document to be managed in the system.</p> <p><i>Imported Documents Only</i>: Select to search for the documents that were imported into the document authoring system as a document that is now being managed in the system.</p>
<b>Effective Date Used</b>	<p>Select a date to search for only the most current clause or section based on the search criteria and effective date you enter. To retrieve effective-dated clauses or sections, leave this date field blank.</p> <hr/> <p><b>Note:</b> When searching for only current or specific effective-dated results, the system suppresses history rows during PeopleSoft Search Framework searches. The PeopleSoft Search Framework search counter displayed above the grid counts history rows and includes them in its count results. So, it is possible that a PeopleSoft Search Framework count indicates that six rows were found in a search, but the system may display only four of them because it suppressed the history rows. The system displays a note when it suppresses history rows.</p> <hr/>
<b>Last Modified Date From and Last Modified Date To</b>	<p>Select a date range. You can search for when clause attributes were last modified within the date range that you select.</p>
<b>Library</b>	<p>Select a clause library on which to search. If you entered a clause ID and it belongs to a library, the system populates this field. Search results display all clauses that are assigned to the group.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Match Any Attributes</b>	<p>Select this check box to indicate that you want the system to display results that match any of the search criteria on the page. In other words, if <i>Any</i> of the attributes are found in a document, then display the document in the results section.</p> <p>Deselect this check box to indicate that you want the system to display results that match all of the search criteria on the page. In other words, if <i>All</i> of the attributes are found in the same document, then display the document in the results section.</p> <p>The system displays this check box only when <i>Document</i> is selected in the <b>Content Type</b> field of the Search Content By Type page, and it is provided by default as not selected.</p>
<b>Notes</b>	<p>Enter a text sting on which to search in notes. The system searches <b>Notes</b> fields for all the clauses, sections, or configurators as part of the search.</p>
<b>Search</b>	<p>Click this button to initiate the search process and produce search results.</p>
<b>Section Type</b>	<p>Select a section type to use in the search. Values are:</p> <p><i>General</i>: Select to include only general sections in the search results. These are overall sections that can be used throughout a document.</p> <p><i>Introduction/Title</i>: Select to include only introduction sections in the search results. These are the first sections in documents.</p>
<b>Section ID</b>	<p>Select a section for which you want to search. This selection restricts the search to a single section.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Source Transaction</b>	<p>Select a document source on which to base a search. Values include <i>Ad Hoc</i>, <i>Purchasing Contracts</i>, <i>Purchase Orders</i>, and <i>Sourcing Events</i>. The value that you select determines the content for the page.</p> <p>If you select <i>Ad Hoc</i>, the system uses only document attributes for the search. Ad hoc documents are not linked to transactions. The <b>PO Contract Attributes</b> (purchase order contract attributes) and <b>Purchase Order Attributes</b> grids do not appear when you select to search for ad hoc documents.</p> <p>Document search attributes are the same for ad hoc, purchasing contracts, purchase order, and sourcing event searches. If you leave the field empty, the system searches documents for ad hoc, purchasing contracts, purchase order, and sourcing events that match the other criteria you enter on this page. The default value for the field is blank.</p> <hr/> <p><b>Note:</b> If the <b>Filter Results Without Chunking For Documents</b> check box is selected on the Installation Options page, the system filters search results based on user security access to the document. Only rows for users who have access to documents appear in the search results.</p> <hr/>
<b>Status (Effective)</b>	<p>Select to search for clauses or sections that are <i>Active</i> or <i>Inactive</i>. If you leave this field blank, the system searches for both statuses.</p>
<b>Title or Body Text</b>	<p>Enter the text that you want to find in the clause. The system searches through titles, as well as the body of the text, of the document for the content type that you selected.</p>
<b>Where Used Search</b>	<p>Click this button to initiate a search for a clause, section, or configurator, depending on the search page content type.</p> <p>See <a href="#">Searching for Library and Document Contents</a>.</p>
<b>Word Template Name</b>	<p>Select a Microsoft Word template on which to base the configurator search. If you define a template, the system displays only those configurators that use the template in the search results.</p>
<b>Wizard ID</b>	<p>Select a wizard on which you want to base a configurator search. The system displays all documents that use this wizard in the search results.</p>

## Understanding the Search Content by Type Page

Supplier Contracts Management designates a Content Type to categorize searches using this component. Depending on which content type is chosen, the system displays a page with appropriate search attributes.



Use the Search Content by Type page to:

- Search for clauses, sections, or document configurator information.
- Search for ad hoc documents that match certain attributes.
- Search for transactional purchase order contract, purchasing contract, and sourcing event information and contract document attributes.

If you select *Purchasing Contracts* or *Sourcing Events*, the system uses both document and either purchasing contract attributes or the purchase order attributes or the sourcing event attributes for the search. This provides search capabilities across transactions in the purchase order or purchasing contract, and it also makes it possible to limit the number of contracts that the system returns in the searched based on document information.

For example, you can leave the search attributes blank for purchase order contract attributes and limit the search for contracts to only those contracts with documents that use a specific clause ID or that are in a specific status.

- Search for text strings within all ad hoc, purchasing contract, purchase order and sourcing event documents in the same search.
- Search for user-defined fields if they have been defined and used.
- If you select Document as the Content Type, the Contract Style is made available on the Search Contents page. Contract Style is associated with the source transaction and is used as search criteria.

Click the **Search** button after you define search attributes. The system will display those documents matching the criteria. You can also click the **Where-Used Search** button to search for where specific document elements are used throughout the document library.

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**Note:** If you are using transactional data, such as item or supplier information that displays as binds in a document, and you change the transactional data but do not update the document, then text searches will not find the changes. This condition applies to text searches against the document, but it does not apply to keyword searches.

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**Note:** To ensure that you have the most up-to-date search collection, run the Build Search Index process for the indexes. The system provides a message at the bottom of the page that indicates when the collection was last built.

For a list of indexes used by Supplier Contract Management, see the documentation explanation for the **Search Definition** field on the [Build Search Index Page](#).

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You can associate clauses to a section definition and add sections to configurators. Sections can also be stored separately and classified in the same manner as configurators so that the creation of a document occurs by adding clauses to sections and sections to configurators.

Use the search results to access the section where you can review section contents and preview the section document. You cannot make changes to the section. Use the Manage Contract Library component to make updates to the section.

---

**Note:** Fields on the [Search Content By Type Page \(for Clauses, Document Configurators, and Sections\)](#) vary depending on the type of content search.

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## Search Content By Type Page (for Clauses, Document Configurators, and Sections)

Use the Search Content By Type page (CS\_CONTSEARCH\_SES) to search content by clauses, document configurators, and sections.

Navigation:

**Supplier Contracts > Search Content > Search Content.** Select *Clause*, *Document Configurator*, or *Section* in the **Content Type** field on the Search Content by Type page.

This example illustrates the fields and controls on the Search Content by Type - Clause page.

### Search Content By Type

Enter search criteria for selected content type.

\*Content Type

Title or Body Text

**▼ Clause Attributes**

SetID <input type="text" value="SHARE"/>	Effective Date Used <input type="text"/>
Description <input style="width: 90%;" type="text"/>	Effective Status <input type="text"/>
Class Name <input style="width: 90%;" type="text"/>	
Clause ID <input style="width: 90%;" type="text"/>	
Clause Group <input style="width: 90%;" type="text"/>	
Library <input style="width: 90%;" type="text"/>	
Approval Status <input type="text"/>	
Checked Out By <input style="width: 90%;" type="text"/>	
Last Approved By <input style="width: 90%;" type="text"/>	
Last Updated By <input style="width: 90%;" type="text"/>	
Notes <input style="width: 100%;" type="text"/>	

**Date Ranges**

Checked Out Date From

Checked Out Date To

Approved Date From

Approved Date To

Last Modified Date From

Last Modified Date To

Search Collection: Supplier Contract Clauses (EffDt) not available.

Use this page to define search attributes for a document clause search. You access the page by selecting *Clause* in the **Content Type** field. After entering the attributes, click the **Search** button to view a list of search results. This page is also used to search document configurators and sections. The Section Attributes changes to Configurator Attributes or Section Attributes, respectively.

**Note:** To ensure that you have the most up-to-date search collection, run the Build Search Index process for the EP\_CS\_SECTIONS and EP\_CS\_CLAUSES indexes. The system provides a message at the bottom of the page that indicates when the collection was last built.

For a list of indexes used by Supplier Contract Management, see the documentation explanation for the Search Definition field on the [Build Search Index Page](#).

## Search Results

This grid appears with the results of the search when you select to search content by clause. The *Content Type*, *Clause ID*, and *Effective Date* fields display information about the clause.

<b>Field or Control</b>	<b>Description</b>
<b>Description</b>	Click to access the Clause Definition page, where you can view clause information and preview the clause in Microsoft Word. You cannot make changes to the clauses.
<b>Where Used</b>	Click to access the Search for All Content Instances page. The page displays where the clause is used throughout this SetID. You can navigate to each use of the clause.

## Related Links

[Search Content By Type Page \(for Clauses, Document Configurators, and Sections\)](#)

## Search Content By Type Page (for Documents)

Use the Search Content By Type page (CS\_CONTNNTS\_DOC\_SES) to search content for documents.

Navigation:

**Supplier Contracts > Search Content > Search Content.** Select *Document* in the **Content Type** field .

This example illustrates the fields and controls on the Search Content By Type document type page.

**Search Content By Type**

Enter search criteria for selected content type.

\*Content Type

Text

Document Search Type

Source Transaction   Match Any Attributes

This example illustrates the fields and controls on the Search Content By Type document type page.

The screenshot displays a search interface with two main sections: **Document Attributes** and **Date Ranges**.

**Document Attributes** includes the following fields:

- Library SetID: SHARE
- Contract Style: [Dropdown]
- Document Type: [Dropdown]
- Ad Hoc SetID: SHARE
- Ad Hoc ID: [Text]
- Document State: All Documents
- Document Status: [Dropdown]
- Configurator Type: [Text]
- Configurator ID: [Text]
- Clause ID: [Text]
- Administrator: [Text]
- Sponsor: [Text]
- Department: [Text]
- Created By: [Text]
- Checked Out By: [Text]
- Last Update User ID: [Text]
- Supplier ID: [Text]

**Date Ranges** includes the following date pickers:

- Begin Date From
- Begin Date To
- Expire Date From
- Expire Date To
- Last Executed From
- Executed Date To
- Created Date From
- Created Date To
- Checked Out Date From
- Checked Out Date To
- Last Modified Date From
- Last Modified Date To

A **Description** field is also present at the top right.

This example illustrates the fields and controls on the Search Content By Type document type page.

The screenshot shows a search interface with a **User Defined Fields** section containing a **Third Party** field.

At the bottom, there are two buttons: **Search** and **Where Used Search**. A status message reads: "Keyword Search will return results last updated 4 hours ago (04/20/2018 8:31:31 AM)."

### Document Attributes

This grid is available for ad hoc, purchase orders, purchasing contracts, and sourcing events document searches. When you are searching for transactional information, such as in a purchase order contract, you can also apply document attributes from this grid to the purchase order contract search.

<b>Field or Control</b>	<b>Description</b>
<b>Library SetID</b>	Select the library SetID upon which you want to base the search.
<b>Description</b>	Enter a text stream to limit the search to documents that contain this text in their description. This text must match the text that was entered as the description when the document was initially created.
<b>Contract Style</b>	Select the contract style you want to use to search for documents. The system displays the documents that match this contract style and other search criteria.

<b>Field or Control</b>	<b>Description</b>
<b>Document Type</b>	Select the document type you want to use to search for documents. The system displays the documents that match this document type and other search criteria. This field is not available if document types have not been selected for use on the Installation Options page.
<b>Ad Hoc SetID</b>	Select an ad hoc SetID in which to search for a document. This field is available when you select <i>Ad Hoc</i> in the <b>Source</b> field.
<b>Ad Hoc ID</b>	Select the ID for the ad hoc document for which you want to search. This field is available when you select <i>Ad Hoc</i> in the <b>Source</b> field.
<b>Document State</b>	Select to search for ad hoc, purchase order, or purchasing contract documents according to their state. The default value for the field is <i>All Documents</i> . You can also search for <i>Inactive Documents Only</i> or <i>Active Documents Only</i> .
<b>Document Status</b>	Select to search for ad hoc, purchase order, or purchasing contract documents according to their approval status. The default value for the field is blank, which means that the system searches for all statuses. You can search for: <ul style="list-style-type: none"> <li>• <i>Approved</i></li> <li>• <i>Collaborated</i></li> <li>• <i>Collaborated, Pending Review</i></li> <li>• <i>Complete</i></li> <li>• <i>Dispatched</i></li> <li>• <i>Draft</i></li> <li>• <i>Executed</i></li> <li>• <i>Pending Approval</i></li> <li>• <i>Pending Collaboration</i></li> <li>• <i>Pending External Collaboration</i></li> <li>• <i>Pending Internal Review</i></li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Configurator Type</b>	Select a configurator type by which to search for documents. Used by itself, the system displays all documents that were used in the search results. Configurator types define requirements that you can use in document configurators. These requirements provide instructions and specific details about a transaction type.
<b>Configurator ID</b>	Select a configurator ID by which to search for documents. Used by itself, the system displays all documents that use the configurator ID in the search results.
<b>Clause ID</b>	Select a clause on which to search. The system displays all documents that include this clause for either ad hoc documents or purchasing order contracts (or both), depending on the source document.
<b>Administrator</b>	Select to search for documents that are based on the administrator.
<b>Sponsor</b>	Select a user ID to search for documents that are sponsored by that user. A sponsor should represent the user from the department that sponsors the contract.
<b>Department</b>	Select a value to search for documents that are sponsored by a single department.
<b>Created By, Checked Out By, and Last Update User ID</b>	Select to search for documents that a user has created, checked out, or last updated.
<b>Supplier ID</b>	Select a supplier ID to search for documents associated with that supplier. This field appears only when the source transaction is <i>Ad Hoc</i> .
<b>Last Modified Date From</b>	Select a value to search for a contract last modified date from. This date represents the last update date of the document management header that includes updates when a document is checked in.
<b>Last Modified Date To</b>	Select a value to search for a contract last modified date to. This date represents the last update date of the document management header that includes updates when a document is checked in.

## User Defined Fields

Use this section to define search criteria for user-defined fields. These are fields that you can use to link specific information to documents. Fields that have been designated for use in searching appear in the section. You use the [User Define Fields](#) page to define the search availability within search contents. . User-defined fields are only available for document searches.

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**Note:** If you select to search using a specific document type, the system displays the subset of user-defined field defined for the document type if the document type is set up to override default user-defined fields. See [Setting Up User-Defined Fields](#).

---

## Purchase Order Attributes

This section is available when you select *Purchase Orders* in the **Source Transaction** field. Use this section to define attributes on which to search for purchase order contract documents. You can use transaction contract values in conjunction with document attributes from the top section to perform searches.

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**Note:** See the next topic for descriptions of the **Supplier ID, Supplier Name, Currency Code, Category, Item ID, and Item Description** fields and the [ChartFields](#) link.

---

See Purchasing Contract Attributes in the [Search Content By Type Page \(for Documents\)](#) topic.

<i>Field or Control</i>	<i>Description</i>
<b>Business Unit</b>	Select a business unit to which you want to limit the search for a purchase order contract document. Purchase orders are defined by business unit.
<b>PO Status</b> (purchase order status)	Select a purchase order status on which to base a search. Statuses range from <i>Open</i> to <i>Approved</i> and <i>Complete</i> .
<b>Buyer</b>	Select a buyer on which to base the document search. This is the buyer defined on the purchase order.
<b>PO Reference</b> (purchase order reference)	Enter the free-form text that is associated to a purchase order. The system searches on the text string that you enter. The text is defined using the <a href="#">Maintain Purchase Order - Purchase Order</a> page.
<b>Supplier Name</b>	Select a supplier name on which you want to base the search for purchasing order documents.
<b>Hold From Further Processing</b>	Select to identify those purchase orders that are on hold from further processing.

<b>Field or Control</b>	<b>Description</b>
<b>Budget Checked</b>	Select to filter only those POs that have been budget checked. Budget checking is available when commitment control is enabled for PeopleSoft Purchasing.
<b>ChartFields</b>	Click this link to access the ChartFields Search Criteria page where you can select individual default ChartFields Use the ChartFields Search Criteria page to define searches for purchase order and purchasing contract source transaction ChartFields. PeopleSoft Search Framework searching enables you to identify related contracts by chart fields such as department and project as part of contract searching.
<b>PO Date From</b>	Select a PO from date on which to base the document search. The system displays any purchase order that was created on the date that you enter.
<b>Amount Open From and Amount Open To</b>	Enter values for the remaining open amount on the purchase order. The system displays documents for those purchase orders that have the amount open within the range that you enter.
<b>PO Date To</b>	Select a PO to date on which to base the document search. The system displays any purchase order that was created on the date that you enter.

## Purchasing Contract Attributes

This section is available when you select *Purchasing Contracts* in the **Source Transaction** field. Use this section to define attributes on which to search for purchasing contract documents. You can use transaction contract values in conjunction with document attributes from the top section to perform searches.

<b>Field or Control</b>	<b>Description</b>
<b>SetID</b>	Select the SetID in which you want to search for a purchasing contract document.



<b>Field or Control</b>	<b>Description</b>
<b>Contract Status</b>	<p>Select a status for which you want to search for transactional contract documents. The system displays only those purchasing contract documents that are at the same status that you select. If you enter a contract ID, the system applies the status.</p> <p>Values include:</p> <ul style="list-style-type: none"> <li>• <i>Approved for Purchasing</i></li> <li>• <i>Canceled</i></li> <li>• <i>Closed, May be Purged</i></li> <li>• <i>Hold, Awaiting an Action</i></li> <li>• <i>Open, Requires Approval</i></li> </ul>
<b>Contract ID</b>	<p>Select a contract on which to base the search. The search results display the contract and its document if a document exists. If you select an ID, the system displays only this contract in the search results.</p>
<b>Description</b>	<p>Enter a contract description on which to search. The system displays all contracts with this text in the search results.</p>
<b>Supplier ID</b>	<p>Select a supplier identifier on which you want to base the search for purchasing contract documents.</p>

<b>Field or Control</b>	<b>Description</b>
<b>ChartFields</b>	<p>Click this link to access the ChartFields Search Criteria page where you can select individual default ChartFields as entered within Contract Entry to include in the search. The ChartField collection does not include ChartField changes for individual purchase orders related to the contract.</p> <p>Among the standard ChartFields available in the search criteria are: <b>Operating Unit, Fund Code, Budget Reference,</b> and <b>Project</b>. If you customize ChartFields, the PeopleSoft Search Framework setup data may need to be customized to support adding your own ChartFields to the collection so they can be searched on.</p> <hr/> <p><b>Note:</b> You can select the General Ledger business unit on which to base the ChartFields search. The <b>GL Business Unit</b> field is required when you are searching for content using the <b>Program Code</b> and <b>Class Field</b> fields. If you do not select a GL business unit, the system does not provide search results for these two fields.</p> <hr/>
<b>Supplier Name</b>	<p>Select a supplier name on which you want to base the search for purchasing contract documents. The system displays all contracts that use this supplier and meet other search attributes in the search results.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Process Option</b>	<p>Select the process to use for the search. Processing options determine a specific contract process that a contract uses throughout its entire contract life cycle. The system uses the value that you select to display all contracts that use the process.</p> <p>Field values are:</p> <ul style="list-style-type: none"> <li>• <i>Distributor</i></li> <li>• <i>General Contract</i></li> <li>• <b>Group Multi Supplier</b></li> <li>• <b>Group Single Supplier</b></li> <li>• <b>Manufacturer</b></li> <li>• <i>Prepaid Voucher</i></li> <li>• <i>Prepaid Voucher w/Advance PO</i> (prepaid voucher with advance purchase order)</li> <li>• <i>Purchase Order</i></li> <li>• <i>Recurring PO Voucher</i> (recurring purchase order voucher)</li> <li>• <i>Recurring Voucher</i></li> <li>• <i>Release to Single PO Only</i> (release to single purchase order only)</li> <li>• <b>Special Purpose</b></li> </ul> <p>See "Understanding Voucher and Order Contracts" (PeopleSoft Source to Settle Common Information).</p>
<b>Master Contract ID</b>	<p>Select a master contract on which to base the search. Master contracts group several contracts for the same supplier and then track them using one master contract ID. You associate the individual contracts with the master contract ID by designating the master contract ID on the Contract Entry page. Search results produce all contracts that are within the master contract you define and that meet other attributes you enter.</p>
<b>Administrator</b>	<p>Select a contract administrator on which to search for contracts. If you only complete this field, the system displays all contracts for which this administrator is responsible in the search results.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Item Category</b>	Select an item category on which to base the search. Categories are groupings of items. The system searches for contracts that contain this category ID and displays them in the search results.
<b>Item ID</b>	Select an item to include in search results. The system displays contracts in the search results that contain this item.
<b>Approved By</b>	Select a user on which to base a search for contracts. The system searches for all contracts that this user has approved.
<b>Item Description</b>	Enter an item description against which to perform a search. The system searches for the text stream that is used in the <b>Description</b> field on the line item.
<b>Contract Category</b>	Select a contract category on which to base the purchasing contract search. Categories enable you to specify groups of items on a contract, rather than having to enter the items one at a time.
<b>Control Type</b>	Select <i>Business Unit</i> , <i>Contract Domain</i> , or <i>Ship To</i> on which to base the purchasing contract search. The control type for the contract is determined on the "Contract Entry - Contract Page" (PeopleSoft Source to Settle Common Information).
<b>Maximum Amount From</b> and Maximum Amount To	Enter a range of values on which to search for purchasing contracts.
<b>Remaining Amount From</b> and Remaining Amount To	Enter a starting and ending amount. The values you enter will determine the amount range on which the system bases its search. Remaining amounts are the unused amounts on purchase order contracts.

## Event Attributes

This section is available when you select *Sourcing Events* in the **Source Transaction** field. Use this section to define attributes on which to search for sourcing event documents. You can use transaction contract values in conjunction with document attributes from the top section to perform searches.

---

**Note:** Additional sourcing-specific fields are available.

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<b>Field or Control</b>	<b>Description</b>
<b>Business Unit</b>	Enter a Strategic Sourcing business unit.

## Reviewing Document Search Results Using the Search Content By Type Page for Clause, Document Configurator, or Section Content Types

Use the Search Content By Type page (CS\_CONTSEARCH\_SES) to populate the Search Results grid with the results of a search for clause, document configurator, or section content types.

Navigation:

**Supplier Contracts > Search Content > Search Contents.** Select either *Clause*, *Document Configurator*, or *Section* in the **Content Type** field on the Search Content by Type page. Click the **Search** button on the Search Content By Type page.

This example illustrates the fields and controls on the Search Content By Type page: Search Results grid for clause, document configurator, or section content types.

Search

Where Used Search

Note: Counters include history rows which are suppressed in ⏪ ⏩ 1 to 20 of 61 ⏪ ⏩ search results.

Search Results
Personalize | Find | 🔍 | 📄
1-20 of 20

Content Type	Clause ID	Effective Date	Description	Where Used
Clause	AMENDMENT BODY	06/03/2005	Amendment configurator body text	Where Used
Clause	CL_200_CONFIDENT01	05/20/2005	NDA Confidential Information clauses	Where Used
Clause	CL_200_SIGNOFF01	05/20/2005	NDA Signature clause	Where Used
Clause	CL_ACCEPTINSP01	11/17/2004	Acceptance and Inspection of Product Clause	Where Used
Clause	CL_AUC_ADDTERMS	01/01/2000	Additional Terms - Sourcing Events	Where Used
Clause	CL_AUC_AGREELIST	01/01/2000	Agreement List for Sourcing Documents	Where Used
Clause	CL_AUC_ATTACH	01/01/2000	Attachments for Sourcing Events	Where Used
Clause	CL_AUC_RELATED	01/01/2000	Related Elements for Events	Where Used
Clause	CL_AUC_SUBMITTAL	01/01/2000	Submittal Clause for Sourcing Events	Where Used
Clause	CL_CONFLICTOFIN01	11/20/2004	Conflict of Interest	Where Used
Clause	CL_DIRISLOS01	11/17/2004	Delivery, Risk and Loss Clause	Where Used
Clause	CL_EXEC_SUMMARY	01/01/2000	Executive Summary Clause	Where Used
Clause	CL_GENREQMTS	01/01/2000	General Vendor Requirements	Where Used
Clause	CL_INSPECTION	01/01/2000	Inspection and Tests	Where Used
Clause	CL_INSURANCE01	01/01/2004	Insurance	Where Used

## Reviewing Document Search Results Using the Search Content By Type Page for Document Content Type

Use the Search Content By Type page (CS\_CONTNNTS\_DOC\_SES) to populate the Search Results grid with the results of a search for document content type.

Navigation:

**Supplier Contracts > Search Content > Search Contents.** Select *Document* in the **Content Type** field on the Search Content by Type page. Click the **Search** button on the Search Content By Type page.

This example illustrates the fields and controls on the Search Content by Type page: Search Results grid for document content type.

Source Transaction	Document Type	Supplier ID	Supplier Name	SetID / Business Unit	Transaction ID	Amendment	Description	View Document
Purchase Orders	Purchase Order Document	SCM0000002	CAMPER'S-001	SHARE	0000000202	0	0000000202	

Use this grid to view document information. The grid appears with the results of the search when you search content by documents. For documents, the setting for the **Filter Results Without Chunking** field on the Installation Options page controls if all rows are returned for a user (unfiltered by user access security) and the appearance of the chunking buttons to page through the results. If this option is selected, then for documents the chunking buttons are not shown, and only those documents for which the user has administrator or view access will be included in the search result.

<b>Field or Control</b>	<b>Description</b>
<b>Source Transaction</b>	Displays either <i>Purchase Order</i> , <i>Purchasing Contract</i> or <i>Ad Hoc</i> , depending on the selection that you make in the <b>Source</b> field. If you selected to search based on both sources, then both sources will appear in the results.
<b>Contract Style</b>	Displays the contract style for the document.
<b>Document Type</b>	Displays the document type for the document. If document types are not set for use in installation options, the column does not appear.

<b>Field or Control</b>	<b>Description</b>
<b>Short Supplier Name</b>	Displays the short name for the supplier.
<b>SetID</b>	Displays the SetID to which this document belongs.
<b>Contract ID</b>	Displays either the system-defined identifier for the contract or the user-defined ad hoc document identifier. Click to access either the Contract Entry page if this is a purchase order contract or the Document Management page if this is an ad hoc contract
<b>File Type</b>	Displays the file type for a document. File types can be <i>Main</i> , <i>Doc Attach</i> (document attachment), and <i>Txn</i> (transaction attachment).
<b>Version</b>	Displays the version number for the document.
<b>Amendment</b>	Displays the amendment number for the document.
<b>Description</b>	Displays a system-generated description that indicates the use of this document. Click the value to access the Document Management page.
<b>Where Used</b>	Displays a link when a document has been associated to another document as a related document. When you click the link, the Search for All Content Instances page appears with the other documents to which this document has been associated.
<b>View</b>	Click the <b>View</b> button to open the Microsoft Word document for the purchase order or ad hoc document.

## Details

Select the Details tab. This tab displays document attributes that include the document status, department, sponsor, and administrator. Also, if the document is an imported document, it is marked with a selected check box.

## Attachments

Select the Attachments tab. This tab displays attachment information that includes the attachment name and description.

## Performing Where-Used Searches

### Page Used to Perform Where-Used Searches

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Search for All Content Instances Page (Define Document Templates and Styles)</a>	CS_CONTSES_XREF	Search where a document template or document elements are used.
<a href="#">Search for All Content Instances Page (Search Content by Type)</a>		

### Understanding the Search for All Content Instances Page

The Search for All Content Instances page can appear from multiple source pages. For example, you can access this page from the:

- [Define Document Templates and Styles Page](#) .
- Search Content by Type page.

See [Understanding the Search Content by Type Page](#)

Depending on the source page, the Search for All Content Instances page may appear different.

### Search for All Content Instances Page (Define Document Templates and Styles)

Use the Search for All Content Instances page (CS\_CONTENTS\_XREF) to see where a document template is used.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Document Templates and Styles.** Click the **Where Used** link on the Define Document Templates and Styles page.



This example illustrates the fields and controls on the Search for All Content Instances (Define Document Templates and Styles).

### Search for All Content Instances

Content Type Word Template

Content ID STDTEMPLATE\_2007.XML

Description

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Search [Return to Document Style Templates](#)

**Search Results** Personalize | Find | View All | First 1-11 of 11 Last

**Basic Info**

SetID	Content Type	Content ID	Description	Where Used
SHARE	Document Configurator	MULTI_SOURCE_AUC	Multi Source document for Sourcing Events	<a href="#">Where Used</a>
SHARE	Document Configurator	MULTI_SOURCE_STD	Multi Source document for Adhoc and Purchasing Contract	<a href="#">Where Used</a>
SHARE	Document Configurator	PURCHASES_STD_PO	Standard document for Purchase Order related Contracts	<a href="#">Where Used</a>
SHARE	Document Configurator	NDA_STD	Standard NDA	<a href="#">Where Used</a>
SHARE	Document Configurator	SERVICES_STD	Standard document for procurement of services	<a href="#">Where Used</a>
SHARE	Document Configurator	PURCHASES_STD_EXEC	Executive Summary for all Procurement Contracts	<a href="#">Where Used</a>
SHARE	Document Configurator	PO_AMEND_AUTO	Amendment configurator for Purchasing Contract Transactions	<a href="#">Where Used</a>
SHARE	Document Configurator	ADHOC AMENDMENT	Adhoc document amendment configurator	<a href="#">Where Used</a>

Use this page to view where a selected template is used throughout the PeopleSoft Supplier Contract Management system. When you click the **Where Used** link from the Define Document Templates and Styles page, the system displays the search results. This page shows the content type and content ID in which the template is used. For example, a clause type with the clause ID.

<b>Field or Control</b>	<b>Description</b>
<b>Description</b>	Click to view the content type, such as a document configurator, where the document template is used. When you click this link, the system accesses the document element.
<b>Where Used</b>	<p>Click this link to access another Search for All Content Instances page that is specific to the content ID.</p> <p>An example of using this link is to search for where a standard template is used. The system provides a list that includes a document configurator. You can click the <b>Description</b> link for that configurator to view that configurator. Then, you can select the <b>Where Used</b> link to search for all the documents that use that configurator.</p>

## Search for All Content Instances Page (Search Content by Type)

Use the Search for All Content Instances page (CS\_CONTSES\_XREF) to search where document elements are used. This search includes bind variable, clauses, documents, configurators, question groups, rules, sections, and wizard definitions.

Navigation:

**Supplier Contracts > Search Content > Search Contents.** Click the **Where Used Search** button on the Search Content by Type page.

This example illustrates the fields and controls on the Search for All Content Instances page: (Search Content by Type).

**Search for All Content Instances**

Content Type:

SetID:

Content ID:

Effective Date Used:

Description:

[Return to Search Content By Type](#)

**Search Results** Personalize | Find | View All | First 1-4 of 4 Last

**Basic Info**

SetID	Content Type	Content ID	Description	Where Used
SHARE	Document Configurator	PURCHASES_STD	Standard document for most Product Purchases	Where Used
SHARE	Document Configurator	MULTI_SOURCE_AUC	Multi Source document for Sourcing Events	Where Used
SHARE	Document Configurator	PURCHASES_STD_PO	Standard document for Purchase Order related Contracts	Where Used
SHARE	Document Configurator	MULTI_SOURCE_STD	Multi Source document for Adhoc and Purchasing Contract	Where Used

Use this page to search where specific document elements are used throughout the document library. For example, if you select a clause, the search results could contain where the clause is included in a rule, section, or configurator. Search results could also contain whether the clause is used as an alternate or dependent clause.

**Note:** Where-Used search functionality does not use PeopleSoft Search Framework.

<b>Field or Control</b>	<b>Description</b>
<b>Content Type</b>	Select the type of document element for which you want to search. This is a required field. Search values are:  <i>Bind Variables, Clause, Document, Document Configurator, Question Group, Rule, Section, Wizard Definition, and Word Template.</i>

<b>Field or Control</b>	<b>Description</b>
<b>SetID</b>	Select a SetID on which to base the search. This field is not available for bind variables.
<b>Content ID</b>	Select a specific ID for the content type that you defined. The values that are available for this field are determined by the selection you make in the <b>Content Type</b> field. This is a required field.
<b>Source</b>	Select the source transaction on which you want to base a search. This field is available for document content types. Values include <i>Ad Hoc</i> , <i>Purchase Orders</i> , and <i>Purchasing Contracts</i> .
<b>Ad Hoc ID</b>	Select an ad hoc document ID for which you want to search. This field is available when you search for ad hoc sources.
<b>Contract ID</b>	Select the contract ID for which you want to search. This field is available when you search for purchasing contract sources.
<b>PO ID</b> (purchase order ID)	Select the purchase order ID for which you want to search. This field is available when you search for purchase order contract sources.
<b>Effective Date Used</b>	Select an effective date on which to search. The system uses the current date as the default value. When you search on an effective date, the system checks for the current instance of the clause based on the date you enter. For example, you can locate a clause as of the effective date to locate specific versions. Then, you can locate which sections, configurators, and documents reference the clause for this effective date.

### Search Results (Basic Info tab)

Use this grid to review the results of a where-used search. You can click links to view more details about how the content type uses the document element for which you searched. You can also perform additional where-used searches on the document elements identified in the results.

<b>Field or Control</b>	<b>Description</b>
Source Transaction	Displays the source transaction value, ad hoc, purchase order, or purchasing contract that you selected for the search.
Document Type	Displays the type of document element that contains the content type for which you are searching.

<b>Field or Control</b>	<b>Description</b>
Content Type	Describes the type of document element that contains the content type for which you are searching.
Content ID	Displays the name for the content type.
Description	Click to access the content for an item retrieved in the search results. For example, if you are searching for a wizard definition and the content type is a document configurator, then this link accesses the Document Configurator Definition page for the document configurator you selected.
Where Used	Click to access another where-used search that enables you to navigate to view more details about the component in which the clause is used. For example, if you identify a section containing text that affects existing configurators and contracts, you can search for which configurators reference the section and, in turn, which documents have been generated from those configurators.
View	Click this button to view the document in which the content exists. The button is available for document configurator and document searches. If the user does not have access to the document, the system issues an error.

### **Search Results (More Details tab)**

Use this page to view additional document information. This information includes the document's version, amendments, and the amendment option. This tab is available when you search for a document or document configurator.

### **Related Links**

[Understanding PeopleSoft Search Framework and Where-Used Searches](#)

# Using the Supplier Contract Workbench

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## Understanding the Supplier Contract Workbench

The Supplier Contract Workbench is a central location from which contract administrators can manage contract-related transactions. Contract Administrators can perform related actions directly from the Workbench, such as accessing source transactions and authored documents. In addition, contract administrators can manage exceptions and take actions based on notifications, worklist items, and alerts. The Supplier Contract Workbench can be used as the starting point for all contract administrator tasks.

When using the Supplier Contract Workbench, the contract administrator begins by searching for a source transaction and specific document or transaction attributes. An *All Sources* search option is available, but not recommended if additional search fields are not used to reduce the search results. The system searches for all authored documents, procurement contracts, as well as purchase orders and sourcing events that have authored documents.

Search criteria can be refined to display the needed results and saved to be reused. Saved search criteria can be marked as public for other contract administrators to use.

Search results are displayed in a grid format where each row can be expanded to show additional detail. The rows that appear in this section can be sorted by clicking on the column heading. In the expanded row, graphical icons are displayed in a lifeline as well as links, which can be used to access additional information.

In addition, you can specify whether you want to employ a SQL-based search method (Real Time Searching) or a Search Engine method for the workbench. PeopleSoft provides these specific Supplier Contract Workbench indexes that are used by the PeopleSoft Search Framework engine to assist in your search for documents based on any of the various combinations of search criteria fields:

<b>Search Definition Index</b>	<b>Search Category Indexes</b>
EP_CS_CWB_ADHOC	EP_CS_CWB_ADHOC
	EP_CS_CWB_AUC
	EP_CS_CWB_CONTRACTS
	EP_CS_CWB_PO

### Steps to Set Up PeopleSoft Search Framework for the Supplier Contract Workbench

To use PeopleSoft Search Framework with the Supplier Contract Workbench, you must:

1. Enable the feature using the *Workbench Search Method* field on the Installation Options - Supplier Contract Management page.

See [Installation Options - Supplier Contract Management Page](#)

2. Set up PeopleSoft Search Framework for your search engine.

See 'Understanding PeopleSoft Search Framework Administration' in the *PeopleSoft PeopleTools Search Technology* documentation.

3. Build and deploy these search definition indexes:

- *EP\_CS\_DOC\_ADHOC*
- *EP\_CS\_DOC\_CONTRACTS*
- *EP\_CS\_DOC\_PURCHORDRS*
- *EP\_CS\_DOC\_SOURCING*
- *EP\_CS\_CWB\_ADHOC*
- *EP\_CS\_CWB\_CONTRACTS*
- *EP\_CS\_CWB\_PO*
- *EP\_CS\_CWB\_AUC*

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**Note:** Indexes with the prefix '*EP\_CS\_DOC*' need to be built before indexes with the prefix '*EP\_CS\_CWB*.' Otherwise, the search engine may return incorrect results.

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## Delivered Permissions

The following sample permissions, or roles, are provided to access the Supplier Contract Workbench:

- EPCS2000 - Supplier Contracts Library
- EPCS3000 - Supplier Contracts & Documents
- EPCS4000 - Supplier Contracts Casual User
- EPAUC1500 - Event Coordinator
- EPAUC3000 - Maintain Events

## Transaction Search

Upon entering the Supplier Contract Workbench page, *Procurement Contracts* appear as a default value in the **Source Transaction** field. This field controls most other fields on the page. Therefore, verify that you are searching for procurement contracts before entering additional criteria. If you are not searching for procurement contracts, then select another source transaction.

<b>Term</b>	<b>Definition</b>
<b>Include Contracts Without Documents</b>	<p>This check box is only available when <i>Procurement Contracts</i> or <i>All Sources</i> is selected in the <b>Source Transaction</b> field:</p> <ul style="list-style-type: none"> <li>• When this check box is selected, procurement contracts that do not have authored documents associated with them are included in the search, and the Document Attributes section does not appear.</li> <li>• When this check box is not selected, only procurement contracts that have authored documents associated with them are included in the search, and the Document Attributes section is available to refine the search.</li> </ul>

## Common Elements Used with the Supplier Contract Workbench

### Common Search Fields

Search fields vary based on the source transaction.

All fields in the search section (excluding SetID/Business Unit) are independent of each other. Therefore prompts that require multiple fields are not supported. For example, when entering an item category, the lookup prompt field for item code or description are not filtered by category. The item category is used with the code, or description, that is selected and if no matches exist, then no results are displayed.

<b>Term</b>	<b>Definition</b>
<b>Source Transaction</b>	<p>Select one of these options:</p> <ul style="list-style-type: none"> <li>• <i>Adhoc Documents</i></li> <li>• <i>All Sources</i></li> <li>• <i>Procurement Contracts</i></li> <li>• <i>Purchase Order Documents</i></li> <li>• <i>Sourcing Event Documents</i></li> </ul> <p>After this option is selected, the entire page changes depending on the source transaction.</p>
<b>Include Contracts Without Documents</b>	<p>Select to indicate that you want to include procurement contracts that do not have authored documents. This field is available only when <i>All Sources</i> or <i>Procurement Contracts</i> is selected in the <b>Source Transaction</b> field.</p>

<b>Term</b>	<b>Definition</b>
<b>SetID</b>	<p>Enter the SetID, which is used for SetID related search fields:</p> <ul style="list-style-type: none"> <li>• Ad Hoc and Procurement Contract searches are limited to this SetID.</li> <li>• When <i>All Sources</i> is selected in the <b>Source Transaction</b> field, Purchase Order and Sourcing Event searches are limited to the business units that are related to this SetID.</li> </ul>
<b>Business Unit</b>	<p>Enter the business unit which is used for search fields related to a specific business unit.</p> <p>This field appears when the Source Transaction field is <i>Purchase Order Documents</i> or <i>Sourcing Event Documents</i>.</p>
<b>Worklist</b>	<p>Select a worklist option, which is based on the source transaction selected. When an option is selected, the search results section displays transactions that have the selected worklist for the user who is logged on.</p> <p>PeopleSoft worklists are accessed through the Supplier Contract Workbench when you expand the Search Results section and click the Worklist icon on the document lifeline.</p>
<b>Keyword</b>	<p>Enter a keyword search term.</p> <hr/> <p><b>Note:</b> This field appears only when you enable the <i>Search Engine</i> method on the Installation Options - Supplier Contract Management page. If you are using the <i>Real Time Searching</i> method, this field will not appear.</p> <hr/>

## Common Buttons


<b>Term</b>	<b>Definition</b>
<b>Search</b>	<p>Click to search for transactions based on the criteria you entered in the page header, Document Attributes, and Additional &lt;source transaction&gt; sections.</p>













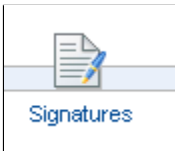


<b>Term</b>	<b>Definition</b>
<b>Save Search Criteria</b>	<p>Click this button to save search criteria that is entered on the page.</p> <p>When you click this button, you must enter a name in the Save As Search Name field. If another search criteria has been saved with the same name and is public, the system displays a message indicating that the search name is a duplicate. You must change the search name to something that is unique.</p> <p>Select the Public check box if you want your search criteria to be available to other employees. Otherwise, the search criteria is considered private and is only available to you.</p>
<b>Clear Search Criteria</b>	Click this button to clear all search values except for the fields that appear by default.
<b>Expand Results and Collapse Results</b>	Click one of these links to expand or collapse all results shown in the Search Results section. These links appear only when search results are displayed.

## Icons in the Search Results Section

Use the icons along the *Lifeline* to access additional components or pages for the contract or document. In most cases, the page accessed is opened in a new window or modal window. The icons that appear and are active vary based on the source transaction and whether the item exists for the transaction line. If an icon is gray, then it does not apply to the row.

<b>Term</b>	<b>Definition</b>
 (Worklist)	<p>Click to access worklist entries for the row. You can access the transaction or document and update the worklist entry as <i>Worked</i>.</p> <p>When using the Worklist search field: the Search Results section only displays transactions that have that worklist item. When you click the worklist icon, the system displays the worklist item that is found based on the Worklist search field.</p> <p>When not using the Worklist search field (it has no value), then all worklist items for the employee and transaction ID are displayed.</p>

<b>Term</b>	<b>Definition</b>
 <b>Contract</b> (Contract)	Click to access the Procurement Contract component for the transaction. This icon only appears for a Procurement Contract source transaction.
 <b>Purchase Order</b> (Purchase Order)	Click to access the Add/Update POs page in PeopleSoft Purchasing.
 <b>Event</b> (Event)	Click to access the Modify an Event - Event Summary page.
 <b>Event Collaboration</b> (Event Collaboration)	Click to access the Review Event Collaboration page.
 <b>Event Analysis</b> (Event Analysis)	Click to access the Analyze Events page.
 <b>Event Award</b> (Event Award)	Click to access the Award Events page.
 <b>Change History</b> (Change History)	Click to access the Change History for the source transaction. This icon appears for Procurement Contract and Purchase Order source transactions.
 <b>Contract Events</b> (Contract Events)	Click to access the Contract Event Inquiry page for the transaction. This icon only appears for a Procurement Contract source transaction.
 <b>Document Management</b> (Document Management)	Click to access the document maintenance pages for the authored document.

<b>Term</b>	<b>Definition</b>
 (Modification Summary)	Click to access the Document Modification Summary.
 (Document Approvals)	Click to access the Document Approvals
 (Collaboration)	Click to access Document Collaboration This icon is only active when collaboration is finalized.
 (Signatures)	Click to access Document Signatures
 (Monitor Agreement)	Click to access the Supplier Contracts Monitor Agreement.
 (Amendment)	Click to access a document amendment. there are multiple ways that an amendment can be created in Supplier Contract Management. Therefore, this icon is only active when a separate amendment is available.

### Links in the Search Results Section

Active links vary based on the source transaction. In addition, links that are related to the transaction are grouped together in one column, and links that are related to the document are grouped together in the other column.

Use these links to access additional pages for the contract or document:

<b>Term</b>	<b>Definition</b>
<b>Transaction ID</b>	Click this link to access the source transaction. This field displays the transaction ID for the source in the Source Transaction column.

<b>Term</b>	<b>Definition</b>
<b>Comments</b>	Click to access the Comments page for the source transaction.
<b>Document Status Inquiry</b>	Click to access the Document Status page.
<b>Master Contract</b>	Click to access master contract information associated with a procurement contract. For additional information about master contracts, see "Setting Up Master Contracts" (PeopleSoft Source to Settle Common Information).
<b>Released Amounts</b>	Click to open the Contract Released Amounts - Released Amounts window for a procurement contract.
<b>Thresholds and Notifications</b>	Click to access the "Thresholds & Notifications Page" (PeopleSoft Source to Settle Common Information) for a procurement contract.
<b>Executive Summary</b>	Click to access the Executive Summary document.
<b>Document History</b>	Click to access the <a href="#">Document History Page</a> .
<b>Attachments and Related Documents</b>	Click to access the <a href="#">Attachments and Related Documents Page</a> .
<b>Update Agreement Statuses</b>	Click to access the <a href="#">Update Agreement Statuses Page</a> .
<b>Document Dates</b>	Click to open the Supplier Contract Doc Dates - Document Dates window, which shows all dates on the document such as Created On, Last Modified On, Approved On, and so on.

## Filter By Options in the Search Results

Use the Filter By options in the search results to further refine your search results. Filter By values vary based on the source transaction, but the *Category* and *Document Date* values are available for all source transaction results.

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**Note:** Filter By options appear only when you enable the *Search Engine* method on the Installation Options - Supplier Contract Management page. If you are using the *Real Time Searching* method, the Filter By options will not appear.

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# Using the Supplier Contract Workbench

## Pages Used with the Supplier Contract Workbench

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Supplier Contract Workbench Page</u>	CS_CONTRACT_WB	Search for and manage transactions based on the source transaction.
<u>Supplier Contract Workbench Page (All Sources)</u>	CS_CONTRACT_WB	Search for and manage actions for all source transactions.
<u>Supplier Contract Workbench Page (Adhoc Documents)</u>	CS_CONTRACT_WB	Search for and manage actions for ad hoc documents
<u>Supplier Contract Workbench Page (Procurement Contracts)</u>	CS_CONTRACT_WB	Search for and manage actions for Procurement Contract documents.
<u>Supplier Contract Workbench Page (Purchase Order Documents)</u>	CS_CONTRACT_WB	Search for and manage actions for Purchase Order documents.
<u>Supplier Contract Workbench Page (Sourcing Event Documents)</u>	CS_CONTRACT_WB	Search for and manage actions for Sourcing Event documents.

## Supplier Contract Workbench Page

Use the Supplier Contract Workbench page (CS\_CONTRACT\_WB) to search for and manage transactions based on the source transaction.

Navigation:

**Supplier Contracts > Supplier Contract Workbench**

This example illustrates the fields and controls on the Supplier Contract Workbench page.

The screenshot shows the 'Supplier Contract Workbench' interface. It features several search filters: 'Source Transaction' (set to 'Procurement Contracts'), 'Contract Style', a checkbox for 'Include Contracts without Documents', '\*SetID' (set to 'SHARE'), 'Contract ID', and 'Worklist'. On the right side, there are search fields for 'Supplier ID', 'Supplier Name', 'Buyer', 'Expire Date From', and 'Expire Date To'. At the bottom, there are three buttons: 'Search', 'Save Search Criteria', and 'Clear Search Criteria'. There are also expandable sections for 'Document Attributes' and 'Additional Contract Attributes'.

All search values entered in the header, Document Attributes, and Additional <source transaction> Attributes section are used by the system to limit your search results. You must start your search by

selecting an option in the Source Transaction field. After selecting a source transaction, the fields in the header area, Document Attributes section and Additional <source transaction> Attributes section change based on the source transaction selected. If you enter more search values into these search sections, then your search results will be more precise.

After selecting source transaction, the system limits the contract style, and only shows the related contract styles in the drop down list. If you select the contract style first, then the system will limit the source transaction's drop down list.

## Document Attributes

This section is used to refine your search results based on attributes used for an authored document. These fields change based on the source type selected.

## Additional <Source Transaction> Attributes

This section is used to refine your search results based on the source transaction. It provides search fields that are specific to the source transaction. This section is not shown when you select *Adhoc Documents* in the **Source Transaction** field.

The contract category, item, and other unused criteria in “Additional Contract Attributes” remain hidden when you select a contract style that is based on group or special purpose contracts.

## Supplier Contract Workbench Page (All Sources)

Use the Contract Workbench page (All Sources) to search for and manage actions for all source transactions.

Navigation:

### Supplier Contracts > Supplier Contract Workbench

This example illustrates the fields and controls on the Supplier Contract Workbench page (All Sources).

The screenshot displays the 'Supplier Contract Workbench' interface. At the top, there are several search filters: 'Source Transaction' (set to 'All Sources'), 'Contract Style', a checkbox for 'Include Contracts without Documents', and '\*SetID' (set to 'SHARE'). A 'Worklist' dropdown is also present. To the right, there is a 'Use Saved Search' field and three search fields for 'Supplier ID', 'Supplier Name', and 'Administrator/Buyer'. Below these is a section titled 'Document Attributes' with a dropdown arrow. This section contains multiple search fields: 'Description', 'Department', 'Administrator', 'Sponsor', 'Document Type', 'Document State' (set to 'All Documents'), 'Document Status', 'Configurator Type', 'Configurator ID', 'Clause ID', 'Last Modified Date From', and 'Last Modified Date To'.

## Header Search Fields

<b>Field or Control</b>	<b>Description</b>
<b>Worklist</b>	Select one of these Worklist options when <i>All Sources</i> is selected in the <b>Source Transaction</b> field: <ul style="list-style-type: none"> <li>• Approval Routing</li> <li>• Sign Review</li> <li>• Transaction Approved</li> <li>• Transaction Denied</li> </ul>

## Document Attributes Section

This section is not shown when you select the **Include Contracts without Document** check box in the header area.

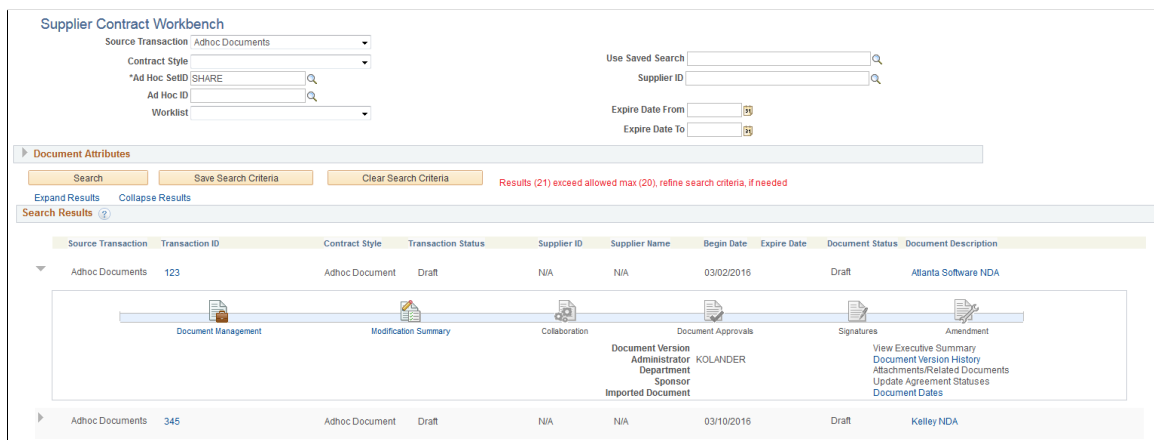
## Supplier Contract Workbench Page (Adhoc Documents)

Use the Contract Workbench page (Adhoc Documents) to search for and manage actions for ad hoc documents.

Navigation:

### Supplier Contracts > Supplier Contracts Workbench

This example illustrates the fields and controls on the Supplier Contract Workbench page (Adhoc Documents).



## Header Search Fields

<b>Field or Control</b>	<b>Description</b>
<b>Ad Hoc ID</b>	This field is the Ad Hoc Document ID and is only used to search across ad hoc documents.
<b>Worklist</b>	Select one of these Worklist options when <i>Ad Hoc</i> is selected in the <b>Source Transaction</b> field: <ul style="list-style-type: none"> <li>• Approval Routing</li> <li>• Sign Review</li> <li>• Transaction Approved</li> <li>• Transaction Denied</li> </ul>
<b>Supplier ID</b>	Select a supplier ID to search for adhoc documents associated with that supplier.

## Document Attributes Section

When *Ad Hoc* is selected in the **Source Transaction** field, this section includes four additional search fields:

- Last Modified Date (From and To)
- Begin Date (From and To)

## Search Results

<b>Field or Control</b>	<b>Description</b>
<b>Transaction ID</b>	Click to access the Document Management page.
<b>Contract Style</b>	Displays the contract style for the authored document.
(Document Description)	Click to access the authored document.
<b>Begin Date and Expire Date</b>	Displays the begin date and the expire date from the authored document.



# Supplier Contract Workbench Page (Procurement Contracts)

Use the Contract Workbench page (Procurement Contracts) to search for and manage actions for Procurement Contract documents.

Navigation:

## Supplier Contracts >Supplier Contracts Workbench

This example illustrates the fields and controls on the Supplier Contract Workbench page (Procurement Contracts) (1 of 2).

**Supplier Contract Workbench**

Source Transaction: Procurement Contracts

Contract Style: [Dropdown]

Include Contracts without Documents

\*SetID: SHARE

Contract ID: [Text]

Worklist: [Dropdown]

Use Saved Search: [Text]

Supplier ID: [Text]

Supplier Name: [Text]

Buyer: [Text]

Expire Date From: [Date]

Expire Date To: [Date]

---

**Document Attributes**

Description: [Text]

Department: [Text]

Administrator: [Text]

Sponsor: [Text]

Document Type: [Dropdown]

Document State: All Documents

Document Status: [Dropdown]

Configurator Type: [Text]

Configurator ID: [Text]

Clause ID: [Text]

Last Modified Date From: [Date]

Last Modified Date To: [Date]

This example illustrates the fields and controls on the Supplier Contract Workbench page (Procurement Contracts) (2 of 2).

**Additional Contract Attributes**

Process Option: [Dropdown]

Contract Status: [Dropdown]

Master Contract ID: [Text]

Control Type: [Dropdown]

Approval Date From: [Date]

Approval Date To: [Date]

Begin Date From: [Date]

Begin Date To: [Date]

Renewal Date From: [Date]

Renewal Date To: [Date]

Agreement Code: [Text]

Compliance Status: [Dropdown]

Target Date From: [Date]

Target Date To: [Date]

Contract Category: [Text]

UPN Type Code: [Text]

Item ID: [Text]

UPN ID: [Text]

Item Description: [Text]

Supplier Item ID: [Text]

Manufacturer's Item ID: [Text]

Manufacturer ID: [Text]

Buttons: Search, Save Search Criteria, Clear Search Criteria

Expand Results, Collapse Results

**Search Results**

Source Transaction	Transaction ID	Contract Style	Transaction Status	Supplier ID	Supplier Name	Begin Date	Expire Date	Document Status	Document Description
Procurement Contracts	0000000000000000000000000038	Purchase Order	Approved	FRA0000001	WAXIS-001	04/17/2006	04/17/2010	Draft	Contract Document
Procurement Contracts	0000000000000000000000000050	Purchase Order	Approved	USA0000010	MIDTON-001	08/01/2009	07/31/2021	Collaborated	Computer Equipment
Procurement Contracts	0000000000000000000000000055	Purchase Order	Approved	SCM0000001	BIKESHOPPE-001	08/28/2012	09/28/2015	Draft	Biking

**Contract Details for WAXIS-001:**

- Buyer: [Text]
- Contract Version: 1
- Version Status: Current
- Process Option: Purchase Order
- Renewal Date: [Text]
- Approval Due Date: [Text]
- Comments: [Text]
- Document Status Inquiry: [Text]
- Master Contract: [Text]
- Released Amounts: [Text]
- Thresholds/Notifications: [Text]
- Document Version: 1.00
- Administrator: VP1
- Department: 13000
- Sponsor: CROTH
- Imported Document: [Text]
- View Executive Summary: [Text]
- Document Version History: [Text]
- Attachments/Related Documents: [Text]
- Update Agreement Statuses: [Text]
- Document Dates: [Text]

## Search Fields

<b>Field or Control</b>	<b>Description</b>
<b>Worklist</b>	<p>Select one of these Worklist options when <i>Procurement Contracts</i> is selected in the <b>Source Transaction</b> field:</p> <ul style="list-style-type: none"> <li>• Agreement Compliance Notice</li> <li>• Approval Routing</li> <li>• Contract Compliance Notice</li> <li>• Contract Thresholds</li> <li>• Sign Review</li> <li>• Spend Threshold</li> <li>• Transaction Approved</li> <li>• Transaction Denied</li> <li>• Verification Compliance Notice</li> </ul>

## Search Results

Use this section to access details from your search results.

<b>Field or Control</b>	<b>Description</b>
<b>Transaction ID</b>	Click to access the Procurement Contract component.
(Document Description)	Click to access the authored document.
<b>Begin Date and Expire Date</b>	Displays the begin date and the expire date from the procurement contract.

## Supplier Contract Workbench Page (Purchase Order Documents)

Use the Contract Workbench page (Purchase Order) to search for and manage actions for Purchase Order documents.

Navigation:

**Supplier Contracts > Supplier Contracts Workbench**

This example illustrates the fields and controls on the Supplier Contract Workbench page (Purchase Order Documents) (1 of 2).

**Supplier Contract Workbench**

Source Transaction:

Contract Style:

\*Business Unit:

PO Number:

Worklist:

Use Saved Search:

Supplier ID:

Supplier Name:

Buyer:

**Document Attributes**

Description:

Department:

Administrator:

Sponsor:

Document Type:

Document State:

Document Status:

Configurator Type:

Configurator ID:

Clause ID:

Last Modified Date From:

Last Modified Date To:

This example illustrates the fields and controls on the Supplier Contract Workbench page (Purchase Order Documents) (2 of 2).

**Additional PO Attributes**

PO Status:

PO Reference:

PO Date From:

PO Date To:

Category:

Item ID:

Item Description:

Supplier Item ID:

Manufacturer's Item ID:

Manufacturer ID:

**Search Results**

Source Transaction	Transaction ID	Contract Style	Transaction Status	Supplier ID	Supplier Name	Begin Date	Expire Date	Document Status	Document D
Purchase Order Documents	000000202	PO Document	Dispatched	SCM000002	CAMPER'S-001	07/24/2007		Draft	00000020
<div style="display: flex; justify-content: space-between;"> <div> <p>Buyer: VP1</p> <p>PO Type: General</p> <p>PO Reference: Fishing Corporate Contract</p> <p>Receipt Status: PO Not Received</p> </div> <div> <p>Document Version: 1.00</p> <p>Administrator: SAMPLE</p> <p>Department: 10000</p> <p>Sponsor: VP1</p> <p>Imported Document</p> </div> <div> <p>View Executive Sum</p> <p>Document Version H</p> <p>Attachments/Related</p> <p>Update Agreement S</p> <p>Document Dates</p> </div> </div>									
Purchase Order Documents	000000334	PO Document	Dispatched	SCM0000001	BIKESHOPPE-001	03/22/2016		Draft	00000033
Purchase Order Documents	000000354	PO Document	Dispatched	SCM0000005	SPICE DEPO-001	04/01/2016		Draft	00000035
Purchase Order Documents	RELATEPO1	PO Document	Dispatched	USA0000001	WBAELEC-001	08/20/2009		Draft	RELATEPO

## Search Fields

<b>Field or Control</b>	<b>Description</b>
<b>Worklist</b>	<p>Select one of these Worklist options when <i>Purchase Order Documents</i> is selected in the <b>Source Transaction</b> field:</p> <ul style="list-style-type: none"> <li>• Approval Routing</li> <li>• Sign Review</li> <li>• Transaction Approved</li> <li>• Transaction Denied</li> </ul>

## Search Results

Use this section to access details from your search results.

<b>Field or Control</b>	<b>Description</b>
<b>Transaction ID</b>	Click to access the Purchase Order page for the transaction ID.
<b>Begin Date</b>	Displays only the purchase order date.
<b>Expire Date</b>	Displays nothing for purchase order documents.
<b>Document Description</b>	Click to access the authored document for the transaction ID.

## Supplier Contract Workbench Page (Sourcing Event Documents)

Use the Contract Workbench page (Sourcing Event) to search for and manage actions for Sourcing Event documents.

Navigation:

**Supplier Contracts > Supplier Contracts Workbench**

This example illustrates the fields and controls on the Supplier Contract Workbench page (Sourcing Event Documents) (1 of 2).

**Supplier Contract Workbench**

Source Transaction:

Contract Style:

\*Business Unit:

Event ID:

Worklist:

Use Saved Search:

Bidder ID:

Bidder Name:

Buyer:

Event Finish From:

Event Finish To:

---

**Document Attributes**

Description:

Department:

Administrator:

Sponsor:

Document Type:

Document State:

Document Status:

Configurator Type:

Configurator ID:

Clause ID:

Last Modified Date From:

Last Modified Date To:

This example illustrates the fields and controls on the Supplier Contract Workbench page (Sourcing Event Documents) (2 of 2).

**Additional Event Attributes**

Event Format:

Event Type:

Event Name:

Event Status:

Start Date From:

Start Date To:

---

Category:

Item ID:

Item Description:    
 254 characters remaining

Source Transaction	Transaction ID	Contract Style	Transaction Status	Supplier ID	Supplier Name	Begin Date	Expire Date	Document Status	Document Description
Sourcing Event Documents	0000000060	Sourcing Event Document	Awarded	N/A	N/A	02/16/2009	12/31/2009	Draft	0000000138
<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>Worklist   Event   Event Collaboration   Event Analysis   Event Award   Document Management   Modification Summary   Collaboration   Document Approvals</p> <p>Buyer: Georgia Wine</p> <p>Event Round: 1</p> <p>Event Version: 1</p> <p>Event Format: Service RFX</p> <p>Event Type: RFX</p> <p>Contact Name: Georgia Wine</p> <p>Comments: Document Status Inquiry, Event History, Event Workbench</p> <p>Document Version Administrator: VP1</p> <p>Department: Department</p> <p>Sponsor: Imported Document</p> <p>View Executive Summary, Document Version History, Attachments/Related Documents, Update Agreement Statuses, Document Dates</p> </div>									
Sourcing Event Documents	0000000070	Sourcing Event Document	Pending Award	N/A	N/A	09/07/2009	01/29/2010	Collaborated	0000000148
Sourcing Event Documents	0000000079	Sourcing Event Document	Posted	N/A	N/A	03/26/2015	03/26/2017	Complete	Computer Purchase

## Search Fields

<b>Field or Control</b>	<b>Description</b>
<b>Worklist</b>	<p>Select one of these Worklist options when <i>Sourcing Event Documents</i> is selected in the <b>Source Transaction</b> field:</p> <ul style="list-style-type: none"> <li>• Analysis Collaboration</li> <li>• Analysis Complete</li> <li>• Approval Routing</li> <li>• Approval Workflow</li> <li>• Review Collaboration</li> <li>• Sign Review</li> <li>• Transaction Approved</li> <li>• Transaction Denied</li> </ul>

## Search Results

Use this section to access details from your search results.

<b>Field or Control</b>	<b>Description</b>
<b>Transaction ID</b>	Click to access the Maintain Events component.
(Document Description)	Click to access the authored document.
<b>Begin Date and Expire Date</b>	Displays the event start date and event finish date for sourcing events.

# Using the Contract/Sourcing WorkCenter and Dashboard

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## Understanding the Contract/Sourcing WorkCenter and Dashboard

The Contract/Sourcing WorkCenter is a combination of the Supplier Contracts and Sourcing applications designed to show the business flow together as a single process. The Contract/Sourcing WorkCenter is a role-based central navigational component that meets the demand of a more productive and streamlined work environment in executing day-to-day activities without having to navigate away from the Work Center. The Work Center is configurable by organization and by function to support different requirements. The Contract/Sourcing WorkCenter is delivered with sample data and your system administrator can tailor, design, and create additional links for access to specific pages, pagelets, and commonly-accessed internal or external sites

For a general understanding of WorkCenters and how to configure them, see *PeopleSoft Application Fundamentals*.

## Pagelet Setup, Maintenance, and Personalization

When setting up and maintaining a WorkCenter, there are setup options that are defined at the system administrator level and personalization options that are defined at the user level. The system administrator must perform their setup options first, using the Enterprise Components, WorkCenter/Dashboards component. The end user performs their personalization options after the administrator's configuration, using the Personalize and Configure options in the WorkCenter

## My Work Pagelet

The My Work section of the Main tab in the Contract/Sourcing WorkCenter includes links to pages that you would need to access on a daily basis. The My Work section can also include exceptions and alerts, where you would need to take some type of action.

Some links that are set up for the My Work pagelet can be subject to filter criteria that limit the amount of data that is available to a user.

If enabled by the system administrator, you can personalize your My Work section by clicking the Pagelet Settings icon.

## Links Pagelet

The Links section of the Main tab in the Contract/Sourcing WorkCenter includes links to pages or other areas of interest to the user role. A system administrator maintains the list of links that are available to the users, as well as related security. You can then personalize the links that you want to access from your WorkCenter. Commonly-used external links can also be added to this section.

## Queries Pagelet

The Query section of the Reports/Queries tab in the Contract/Sourcing WorkCenter can include links to Query Manager, public queries, private queries, and pivot grids. The system administrator can determine if an end user can add public or private queries, and you can personalize your queries accordingly. When a link is selected, the query or pivot grid results are displayed in the right pane of the WorkCenter or in a new window. Query results can be saved to Microsoft Excel.

## Reports and Processes Pagelet

The Reports and Processes section of the Reports/Queries tab in the Contract/Sourcing WorkCenter includes links to reports and processes. The links take you to the run control page for reports, processes, and the Reporting Console. The system administrator can enable users to configure this pagelet to their own specifications.

## Contract/Sourcing WorkCenter Dashboard

The Contract/Sourcing Dashboard is a Homepage that contains pagelets in the transaction area. The Contract/Sourcing WorkCenter Dashboard is accessed from the Contract/Sourcing WorkCenter.

For information about setting up PeopleTools options for the WorkCenter, see *PeopleTools: Global Technology* and *PeopleTools: Portal Technology*.

## Example: Contract/Sourcing WorkCenter

This example illustrates the fields and controls on the Contract/Sourcing WorkCenter. You can find definitions for the fields and controls later on this page.



### Related Links

"Understanding WorkCenters and Dashboards" (Enterprise Components)



"Configuring Pagelets" (Enterprise Components)

"Configuring Filter Definitions and Values" (Enterprise Components)

"Using the Data Migration Workbench for PeopleSoft WorkCenters " (Application Fundamentals)

## Understanding the Contract/Sourcing WorkCenter - My Work Pagelet

In the Contract/Sourcing WorkCenter, system-defined To-do lists can be rendered as links under the “My Work” pagelet apart from Alerts or Notifications. Administrators have the option to selectively import the delivered contents for consumption as “My Work” into the WorkCenter.

When the Contract/Sourcing WorkCenter is launched, the work items awaiting your attention or action along with the number of transactions-to-work (optional) will be displayed in the “My Work” pagelet of the Sourcing/Contract WorkCenter. After you have worked on a work item, refresh the pagelet to get the most updated number of transactions-to-work.

This example illustrates the fields and controls on the My Work Pagelet.

The screenshot displays the 'My Work' pagelet in the Contract/Sourcing WorkCenter. The pagelet is titled 'Procurement Contract Spend' and contains a 'Pivot Grid' with the following filters:

- Buyer Name (All)
- Item Category (All)
- Contract Category (All)
- Item ID (All)
- Supplier Name (All)
- SetID: SHARE

Below the filters is a table with the following data:

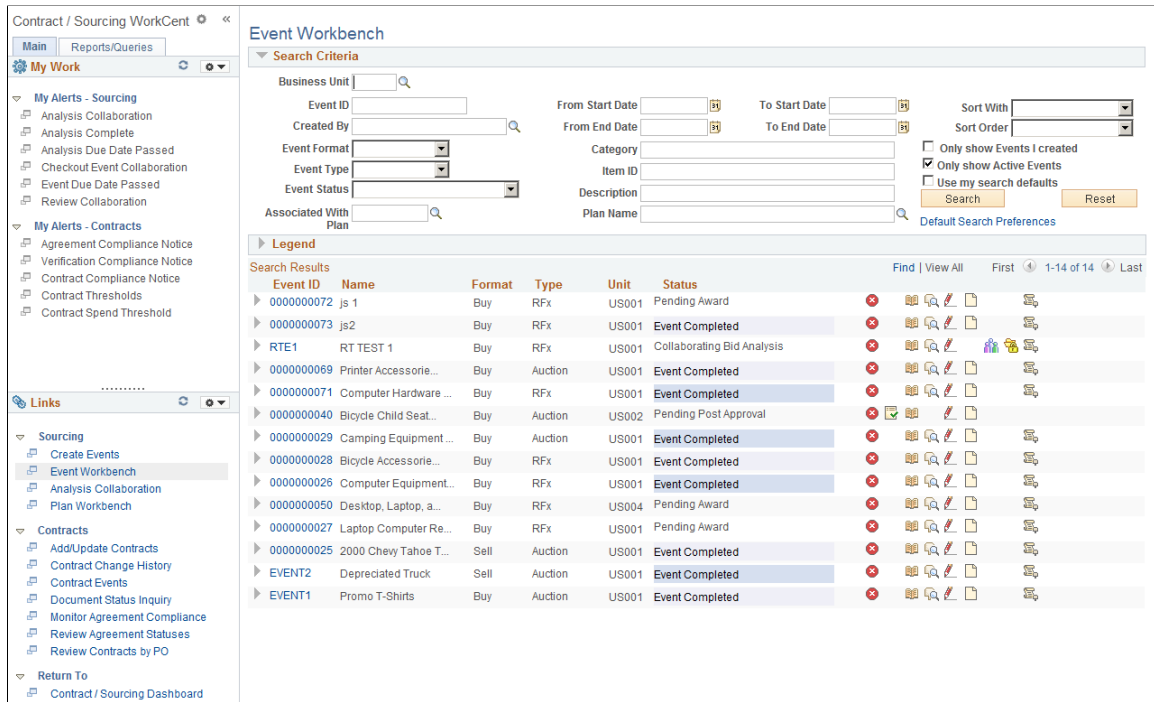
	Open Item Released	Line Released Am...	Category Release...	Total Amount (Sum)
All	114749595.270	602572.000	26339.400	115378506.670

Below the table are sections for 'Spend By Supplier', 'Documents Pending Action', and 'Documents by Due Date'.

## Understanding the Contract/Sourcing WorkCenter - Links Pagelet

Use the Contract/Sourcing WorkCenter Links pagelet to view the Contract and Sourcing links. The primary purpose of this pagelet is to minimize the number of clicks to access components and external links.

This example illustrates the fields and controls on the Contract/Sourcing WorkCenter - Links pagelet. You can find definitions for the fields and controls later on this page.



The following is the list of Links pagelet delivered in Contracts/Sourcing WorkCenter:

*Sourcing*

<b>Term</b>	<b>Definition</b>
<b>Create Events</b>	Click this link to find an existing event, search by keyword, or add a new event.
<b>Event Workbench</b>	Click this link to collaborate on events, check them in and out, and review a list of all created events and event details.
<b>Analysis Collaboration</b>	Click this link to analyze the bids received, and invite Collaborators to collaborate on bids received.
<b>Plan Workbench</b>	Click this link to manage sourcing plans.

*Contracts*

<b>Term</b>	<b>Definition</b>
<b>Add/Update Contracts</b>	Click this link to define or update supplier contract information.

<b>Term</b>	<b>Definition</b>
<b>Contract Change History</b>	Click this link to view contract header, PO defaults, and price adjustments history.
<b>Contract Events</b>	Click this link to view contract events
<b>Document Status Inquiry</b>	Click this link to view documents associated to the Contract
<b>Monitor Agreement Compliance</b>	Click this link to monitor Contract agreements.
<b>Review Agreement Statuses</b>	Click this link to review the status of agreements on the Contract
<b>Review Contracts by PO</b>	Click this link to view contract-related purchase order line information.

System administrators use the "Configure Pagelets - Links Page" (Enterprise Components) to set up the WorkCenter Links pagelet for end users.

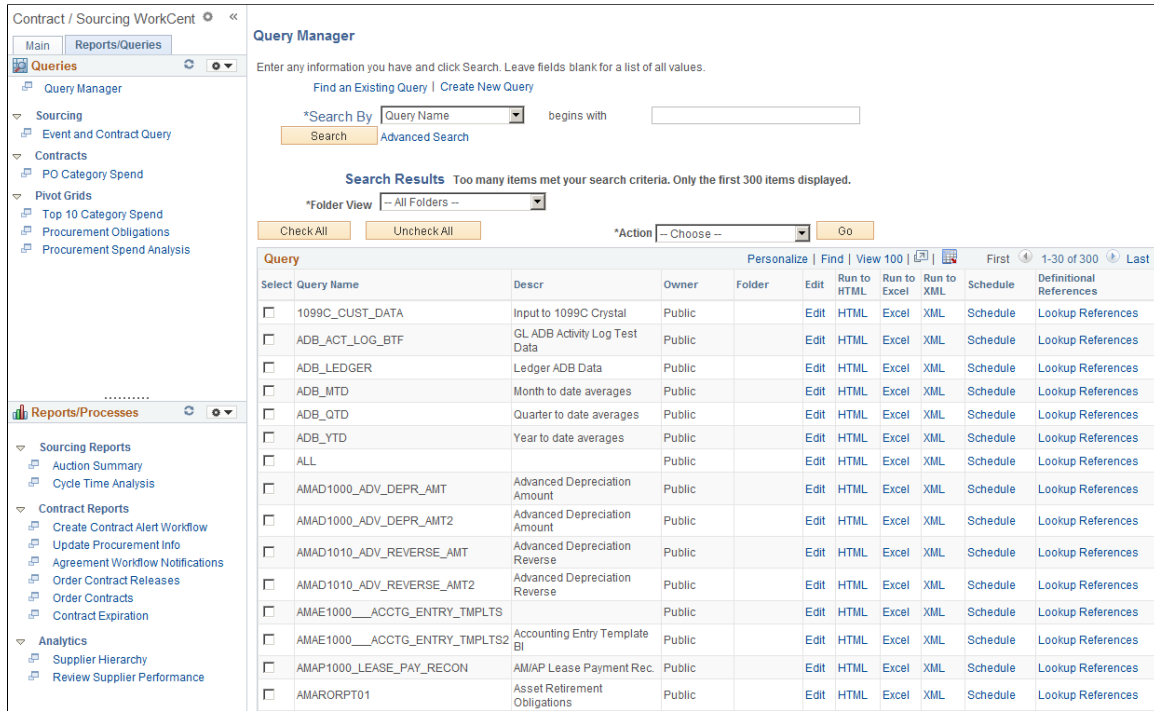
End users use the "Working With and Personalizing the Classic Links Pagelet As an End User" (Application Fundamentals) to personalize the Links pagelet for personal use.

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## Understanding the Contract/Sourcing WorkCenter - Queries Pagelet

The Query section of the Reports/Queries tab includes links to Query Manager, public queries, private queries and pivot grids. Click on any link in the query pagelet to display that query or pivot grid in the transaction area of the workcenter.

This example illustrates the fields and controls on the Queries Pagelet.



System administrators use the "Configure Pagelets – Queries Page" (Enterprise Components) to set up the WorkCenter Queries pagelet for end users.

End users use the "Working With and Personalizing the Classic Queries Pagelet As an End User" (Application Fundamentals) to personalize the Queries pagelet for personal use.

## Understanding the Contract/Sourcing WorkCenter - Reports and Processes Pagelet

The Reports/Processes pagelet provides access to system defined reports and processes for which you have access.

This example illustrates the fields and controls on the Contract/Sourcing WorkCenter –Reports and Processes Pagelet.

The screenshot displays the 'Contract / Sourcing WorkCent' interface. The left sidebar shows a navigation tree with 'Reports/Processes' selected, containing sub-items like 'Auction Summary', 'Cycle Time Analysis', and 'Contract Reports'. The main area is titled 'Auction Summary' and includes a 'Run' button. Below the title are controls for 'Run Control ID' (set to DAILY), 'Language' (English), and 'Report Manager'. The 'Report Request Parameters' section contains fields for 'Sequence' (1), 'Auction Format' (Both), 'Business Unit', 'To Business Unit', 'Department', and 'Entered By'. A section for 'Select to include events with the following event create dates:' offers radio buttons for 'All Dates' (selected) and 'Specify Date Range', with corresponding 'From Date/Time' and 'Thru Datetime' fields. Below this are search fields for 'Event ID', 'Round', and 'Line'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Add', and 'Update/Display'.

System administrators use the "Configure Pagelets – Reports/Processes Page" (Enterprise Components) to set up the WorkCenter Reports/Processes pagelet for end users.

End users use the "Working With and Personalizing the Classic Reports and Processes Pagelet As an End User" (Application Fundamentals) to personalize the Reports/Processes pagelet for personal use.

## Using the Contract/Sourcing WorkCenter - Dashboard

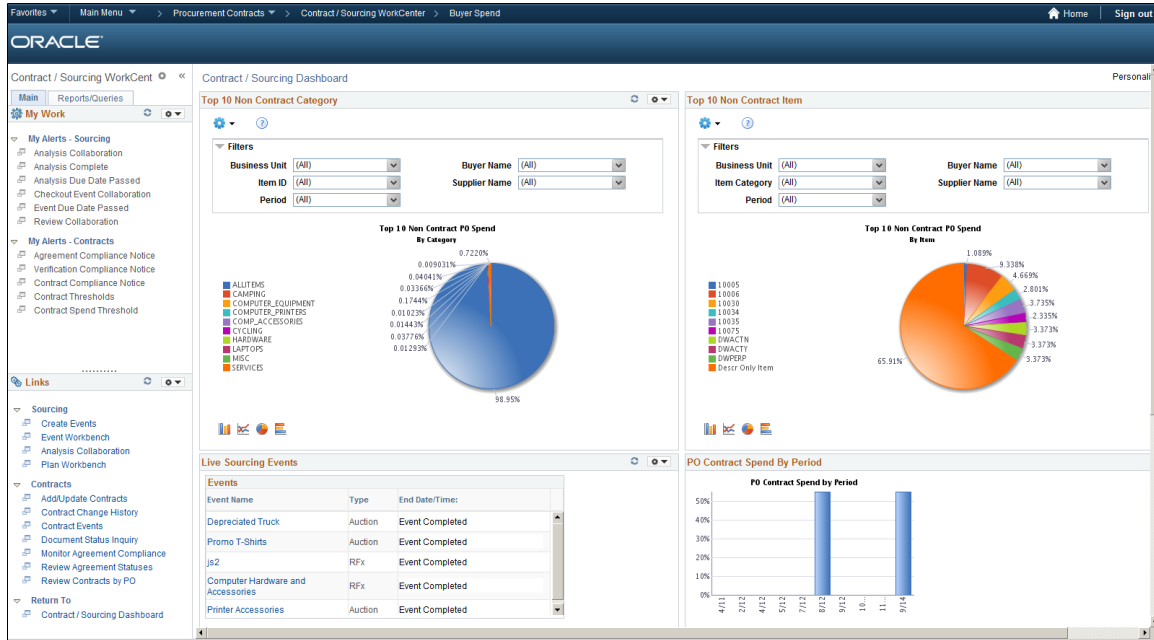
You can access the Contract/Sourcing Dashboard from within your Contract/Sourcing WorkCenter. When you first click the Contract/Sourcing WorkCenter Dashboard link, the delivered pagelets appear by default. You can click the refresh button for each pagelet to view the data.

You can configure and personalize the Dashboard pagelet presentation (for example, presenting the pagelets side-by-side) by using Personalize Content/Layout links located in the top right corner of your working zone.

Dashboards can display pivot grids that can also be displayed on a users' Home page. Pivot grids are based on PSQueries and can display the results in a grid format, a chart format, or both. You use the Pivot Grid Wizard (Reporting Tools, Pivot Grid, Pivot Grid Wizard) to design how the page is displayed to the user.

Pivot Grids can be added as pagelets (on a user's Home page) and to the Queries tab in a WorkCenter.

This example illustrates the fields and controls on the Contract/Sourcing Workcenter Dashboard.



## Related Links

"Configuring Pagelets" (Enterprise Components)

# Creating Reports for Library and Document Contents

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## Understanding PeopleSoft Supplier Contract Management Reports

PeopleSoft Supplier Contract Management provides document reports that you can use or tailor to meet organizational needs. The reports provide summary and detailed document information along with where clauses and sections are used, if they have been changed, or if they have not been used since a date that you specify. The reporting system makes it easy to access, tailor, run, and view the reports.

You can run the reports from the run control pages of the PeopleSoft Supplier Contracts Reports menu. The system builds the reports using BI Publisher. To create the reports you do not need to use PeopleCode, and there are not any custom pages required to run the reports.

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**Note:** To enable users access to Supplier Contract Management reports, you need to define users and roles as SCMTUSER users on the Report Category page. To access the page, select **Reporting Tools > BI Publisher > Setup > Report Category** and then search for the SCMTUSER report category. After accessing the Report Category page, you can specify the roles or users that you want to run and have access to report pages. If the SCMTUSER report category is not available, you can add the value.

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## Common Elements Used When Creating Reports for Library and Document Contents

<i>Field or Control</i>	<i>Description</i>
<b>As Of Date</b>	Select a date. This is the date for the template layout. Typically, you leave the date as the current date so that you use the latest version of the report. The field is required, and the system displays an error message if the template is not active as of the <b>As Of Date</b> field value.
<b>Created Date From</b> and To Date	Select a date from which you want to create a report for when documents were created. All documents that were created within the date range that you enter, and that meet other criteria, are included in the report. You cannot enter dates in the future and the date that you select in the <b>Created Date From</b> field must be earlier than or equal to the to date.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Department</b>	Select a department on which to base a contract document search.
<b>Document Administrator</b>	Select a document administrator on which to base a contract document report. The system retrieves information about those documents for which the administrator is responsible.
<b>Document Status</b>	Select a document status on which to base a report. The status represents the life-cycle state of the document. Only documents that are in the status you select are included in the report.
<b>Document Type</b>	Select a document type on which to base a report. Document types help you define specific settings, defaults, and security for fine-tuning the use of each type of document. Only documents that were created using the document type that you select appear in the report.
<b>Last Modified Date From and To Date</b>	Select a date from which you want to create a report for changed documents. The date cannot be in the future and must be less than or equal to the to date. The last modified date to must be greater than or equal to the last modified date from.
<b>Library SetID</b>	Select a library SetID. The SetID is used in conjunction with a document type. The document type is SetID controlled. So, you need to enter a library SetID before you can enter a document type, which is a library element.
<b>Sponsor</b>	Select a sponsor on which to base the report.



<b>Field or Control</b>	<b>Description</b>
<b>Source Transaction</b>	<p>Select the source transaction type on which to base the contract document report. The source transaction indicates the transaction from which the document originated. If you do not make a selection, all source transaction types are included in the report. If you select a source transaction, the system provides additional entry fields based on the source transaction.</p> <p>Valid values include:</p> <p><i>Ad hoc:</i> A stand-alone document that is not associated with a transaction. When you select this value, the system displays the <b>Ad Hoc ID</b> field and ad hoc ID from and to fields.</p> <p><i>Purchasing Contract:</i> A document that is based on transactional purchasing contract information. When you select this value, the system displays the Contract SetID field and contract ID from and to fields.</p> <p><i>Purchase Order:</i> A contract document generated from a purchase order. When you select this value, the system displays fields that relate to a purchase order, such as the <b>Business Unit</b> and <b>Purchase Order ID From</b> and <b>Purchase Order ID To</b> fields.</p> <p>Also, if you select <i>Purchase Order</i>, the system displays the Supplier SetID and Supplier ID fields for you to define specific suppliers.</p>
<b>Template ID</b>	<p>Select the template that you want to use to run the contract document report. PeopleSoft Supplier Contract Management provides basic templates that you can use or tailor to meet organizational needs. This list provides the report followed by the default template provided for the report:</p> <ul style="list-style-type: none"> <li>• Document Status Summary report – CS_DOC_STAT1 template</li> <li>• Document Status Detail report – CS_DOC_STAT2 template</li> <li>• Contract Content Deviations report – CS_OBJ_DEV template</li> <li>• Contract Content Deviations Summary report – CS_OBJ_DEV_2 template</li> <li>• Contract Content Deviations by Contract report – CS_OBJ_DEV_3 template</li> <li>• Unused Contract Content report – CS_OBJ_UNUSE template</li> <li>• Contract Content Usage report – CS_OBJ_USAGE template</li> </ul>

## Creating Reports

### Pages Used to Create Supplier Contract Management Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Document Status Summary Page</u>	CS_RPT_DSTAT1	Create Document Status Summary reports.
<u>Document Status Detail Page</u>	CS_RPT_DSTAT2	Create Document Status Detail reports.
<u>Contract Content Deviations Page</u>	CS_RPT_OBJDEV	Create Contract Content Deviations reports. Three versions exists for this report.
<u>Unused Content Page</u>	CS_RPT_OBJUNUSE	Create Unused Contract Content reports.
<u>Content Usage Page</u>	CS_RPT_OBJUSE	Create Contract Content Usage reports.

### Document Status Summary Page

Use the Document Status Summary page (CS\_RPT\_DSTAT1) to create Document Status Summary reports.

Navigation:

**Supplier Contracts >Reports >Document Status Summary**

This example illustrates the fields and controls on the Document Status Summary page.

You use this page to run the Document Status Summary report process (CS\_DOC\_STAT1). This report provides basic document status information for the documents that you select to include in the report. When the system does not locate report data, the report contains a No Data Found line. The last page of a report also has a End of Report line.

The report is sorted by library SetID, then source transaction, document type, administrator, ad hoc SetID/ad hoc ID, contract SetID, contract ID, and purchase order business unit/purchase order ID.

## Related Links

[Document Status Summary \(CS\\_DOC\\_STAT1\)](#)

## Document Status Detail Page

Use the Document Status Detail page (CS\_RPT\_DSTAT2) to create Document Status Detail reports.

Navigation:

### Supplier Contracts >Reports >Document Status Detail

You use this page to run the Document Status Detail report (CS\_DOC\_STAT2) process. The report is similar to the summary report, but provides more detailed information in a different format about document statuses. Among the additional features, the report contains provides the collaboration status, as of date, and version. If a document is in Dispatched status the report provides dispatched as of date and version. If the document is in an Amended status, the report provides the amendment, amendment option, and as of date.

Also if user-defined fields are enabled on the PeopleSoft Supplier Contract Management setup page, and if the fields are also enabled for the document type used for the document (or if document types are not in use), then those user fields that are enabled appear in the report.

The report is sorted by library SetID, then source transaction, document type, administrator, ad hoc SetID/ad hoc ID, and contract SetID.

For more information about fields on this page, see the common elements section.

## Related Links

[Document Status Detail \(CS\\_DOC\\_STAT2\)](#)

## Contract Content Deviations Page

Use the Contract Content Deviations page (CS\_RPT\_OBJDEV) to create Contract Content Deviations reports.

Navigation:

**Supplier Contracts >Reports >Contract Content Deviations**

Three versions exist for this report. The first version is the Contract Content Deviations report (CS\_OBJ\_DEV\_1). The second is the Contract Content Deviation Summary report (CS\_OBJ\_DEV\_2). This report is the same as CS\_OBJ\_DEV but does not include object text. The final version is the Contract Content Deviation by Contract (CS\_OBJ\_DEV\_3). This version is the same as CS\_OBJ\_DEV\_1 but is sorted by contract and then library object within the contract. This report includes the modified object text.

You use this page to run the Contract Content Deviation report (CS\_OBJ\_DEV\_1) process. The report provides a listing of documents having deviations based on the document objects selected, and that have been manually modified within documents as of the date that you specify. So, this report enables you to identify which contracts have deviations against the type of content for which you want to search, such as highly sensitive terms and conditions.

The system tracks changes made to documents for all objects within that document based on when the document was last checked in, not when each individual change was made. For example, if you update an object one day and check it in, and then a different object in the same document is changed later in the day, and checked in, both objects will show the same last modified date. The last modified date always reflects the last time the entire document was checked in.

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**Note:** Documents will only appear in this report if they have manual changes that were made directly to the newly created or copied document. So, for example if users update a document, and then you create a new document using the Copy From Contract link of the first document, the newly created document will not appear in the Contract Content Deviations report. This is because those changes were not made directly to the new document but were instead made by copying in the entire document.

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## Report Template

Use this group box to define template information for the report.

<b>Field or Control</b>	<b>Description</b>
Template ID	<p>Select a template for use with the report. The Contract Content Deviations report has three different template views. They are:</p> <ul style="list-style-type: none"> <li>• <i>CS_OBJ_DEV_1</i>: Content Deviation: This view is sorted by library SetID, content type, content ID, and then transaction keys (SetID/business unit, ad hoc ID/contract ID/purchase order ID). This view provides the full text of a modified section or clause.</li> <li>• <i>CS_OBJ_DEV_2</i>: Content Deviation Summary: This view is similar to the Content Deviation report (<i>CS_OBJ_DEV</i>) and has the same sort methods, but does not have the full text of modified sections or clauses.</li> <li>• <i>CS_OBJ_DEV_3</i>: Content Deviation by Contract: This view has the same information as the Content Deviation report (<i>CS_OBJ_DEV</i>) but is sorted by transaction keys (SetID/business unit, ad hoc ID/contract ID/purchase order ID), then by library SetID, content type, and content ID.</li> </ul>

## Library Object Selection Criteria

Use this group box to define objects from the contract library on which to build the Contract Content Deviations report. To define document-level values for the report use the Document Selection Criteria group box.

<b>Field or Control</b>	<b>Description</b>
<b>Library SetID</b>	Select a library SetID.
<b>Incl Add/Del Library Content</b> (include additions and deletions to library content)	Click to include library content that has been manually added or deleted for documents in the report. When this check box is deselected, the system only includes changes that have been manually made to existing document objects.
<b>Clause or Section</b>	Select to build the report for clauses or for sections. If you leave the field blank, both clauses and sections are included in the report. If you select <i>Section</i> , the <b>Class Name</b> and <b>Approval Type</b> fields are not available.

<b>Field or Control</b>	<b>Description</b>
<b>Class Name</b>	Select a clause class name to which you want to limit the report. You use classes that require workflow approvals for the clause definition or within documents. When you select a class, the system only includes modified documents in the report that include clauses that have been updated within that class.
<b>Approval Type</b>	Select an approval type to which you want to limit the report. An approval type is a part of the workflow process and controls approvers for the clause approval process and document approval process. When you select an approval type, the system only includes modified documents that include clauses that have been updated within that approval type.

### Document Selection Criteria

Use this group box to define document report criteria. The system uses these values along with the library object selections to create the Contract Content Deviation report. Depending on the source transaction that you select, the system provides additional fields on which to base the search.

<b>Field or Control</b>	<b>Description</b>
Include Only In-Process Docs	Click to exclude documents in an Executed or Complete status from the report. When the check box is deselected, documents will be included in the report regardless of the Executed or Complete status.

### Related Links

[Contract Content Deviations \(CS\\_OBJ\\_DEV\)](#)

## Unused Content Page

Use the Unused Content page (CS\_RPT\_OBJJUNUSE) to create Unused Contract Content reports.

Navigation:

**Supplier Contracts >Reports >Unused Contract Content**

You use this page to run the Unused Contract Content report (CS\_OBJ\_UNUSE) process. This report provides information about contract library objects that are not used in documents. This information helps you determine outdated or dormant objects in the contract library. The report lists the objects by SetID, content type, and content ID and provides details about each document in which the object is used.

Fields on this page are similar to those on previous report pages. See those page details and the common elements section for more information about the Unused Contract Content report.

## Related Links

[Unused Contract Content CS\\_OBJ\\_UNUSE](#)

## Content Usage Page

Use the Content Usage page ( CS\_RPT\_OBJUSE) to create Contract Content Usage reports.

Navigation:

**Supplier Contracts >Reports >Contract Content Usage**

You use this page to run the Contract Content Usage report (CS\_OBJ\_USAGE) process. This report provides information about where contract library objects have been used in documents. The report lists the objects by SetID, content type, and content ID.

This page is similar to previous report pages. See those page details and the common elements section for more information about the Contract Content Usage report.

## Related Links

[Contract Content Usage \(CS\\_OBJ\\_USAGE\)](#)

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## Accessing Other Procurement Contract Reports

You can access a variety of procurement contract reports from within PeopleSoft Supplier Contract Management by using the Procurement Contract Reports component (Supplier Contract, Procurement Contract Reports).

These reports include:

- **Master Contracts:** Lists all the master voucher contracts for a specified SetID.
- **Recurring Voucher Contracts:** Lists all the voucher contracts for a specified SetID with contract header and distribution information.
- **Recurring Voucher Contract Details:** Lists recurring voucher contract details by SetID and contract ID.
- **Order Contracts:** Lists all the supplier contracts based on selection criteria you enter on the Order Contracts page.
- **Internal Order Contracts:** Lists all internal contracts based on selection criteria you enter on the Internal Contract Report page. You can view item usage by category, by supplier, and by contract.
- **Order Contract Releases:** Lists order contract releases based business unit or SetID.
- **Non-Contracted Items:** Lists use and monetary value of items not under contract. Additionally, you can identify items being used that should be substituted for items currently under contract.
- **Contract Expiration:** Lists, by supplier/category or category/supplier, contracts that are scheduled to expire within a selected date range.

- **Activities Report:** Lists activities against contracts within a specified SetID.



## Chapter 18

# Setting Up and Using Digital Signatures

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## Understanding Digital Signatures

This topic provides overviews of:

- Signature Methods Used to Manage the Document Signature Lifecycle
- Implementation Considerations
- Methods Used to Create Signature Fields

## Overview

PeopleSoft Supplier Contract Management provides the capability to use third-party digital signatures for internal as well as external users to sign off on contract documents. Digital signatures are cryptographically-based signature assurance schemes. They are often used in the context of public key infrastructure (PKI) schemes in which the public key used in the signature scheme is tied to a user by a digital identity certificate issued by a certificate authority.

Digital signatures provide:

- Document integrity that verifies the document content has not been altered.
- User authentication that verifies the document came from the person you think sent it.
- Non-repudiation that verifies a level of proof regarding who electronically signed the document and what they signed.

## Signature Methods Used to Manage the Document Signature Lifecycle

PeopleSoft provides four signature methods you can use to manage the document signature lifecycle:

- **Adobe:** Use this signature method to sign documents using Adobe Systems software.

To use this signature method, you must have Adobe Acrobat on a windows machine, the server must be set up, and a URL must be defined in the Document Compares and Rendering section. In addition, the administrator must have Adobe Professional 8 installed and users, who are required to sign a document, must have Adobe Reader installed.

- **Adobe (Word):** Use this signature method to dispatch contract documents in PDF or to use Adobe digital signatures.

To use this signature method, you do not need Adobe Acrobat, but you do need Microsoft Word 2007, or a later version, installed on the Windows machine. In addition, to use Adobe digital signatures, the document administrator must have Adobe Acrobat installed and users who are required to sign documents must have Adobe Reader installed.

- **Adobe Sign:** Use this signature method to sign documents using Adobe Sign.

This signature method provides cloud-based document signature lifecycle management and enables a contract specialist to prepare the document (convert to PDF and create signature fields), route the document, and guide signatures in one step—there is no need to export the document for preparation and re-upload it into the PeopleSoft application. In addition, this signature method enables signers to sign documents without logging into the PeopleSoft application. Signers can sign using their mobile devices.

To use this signature method, you must have an account with Adobe Sign. In addition, you must have Microsoft Word 2007 (minimum) on the Windows machine and the URL for the application server must be defined using the Installation Options – Supplier Contract Management page.

- **DocuSign:** Use this signature method to sign documents using DocuSign.

This signature method provides cloud-based document signature lifecycle management and enables a contract specialist to prepare the document, route the document, and guide signatures in one step—there is no need to export the document for preparation and re-upload it into the PeopleSoft application. In addition, this signature method enables signers to sign documents without logging into the PeopleSoft application. Signers can sign using their mobile devices.

To use this signature method, you must have an account with DocuSign. In addition, you must have Microsoft Word 2007 (minimum) on the Windows machine and the URL for the application server must be defined using the Installation Options – Supplier Contract Management page.

- **Word:** Use this signature method to sign documents using Microsoft Word.

To use this signature method, you must have Microsoft Word 2007 (minimum) on the Windows machine and the URL for the application server must be defined using the Installation Options – Supplier Contract Management page. In addition, users who are required to sign the document must have Microsoft Word 2007 (minimum) to sign the document.

## Implementation Considerations

Note these Implementation considerations for the technologies you use with digital signatures:

- **Adobe Acrobat product (.pdf):** To use Adobe digital signatures, the contract documents will be converted to PDF. This requires Office Word 2007, or later version, to be installed on the windows machine. Previous releases of Oracle's PeopleSoft Supplier Contract Management software required Adobe Acrobat to be installed on the same windows machine. This enables you to prepare a .pdf document for signature purposes from a Microsoft Word document. Internal and external users can sign documents using Adobe Reader.

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**Note:** If you are using Microsoft Word 2007, you need to download a Microsoft add-in.

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See [Setting Up Document Comparison and Rendering](#)

When documents are ready to be prepared for digital signatures, the document administrator clicks the Prepare for Signature button on the Document Management page. This renders the document as a .pdf file on the server-side, and then launches the PDF document on the client so that the document administrator can enable and certify (sign) the document. Each document administrator must also have Adobe Acrobat on the client in order to enable usage rights on the document so that others can sign it using the freeware Adobe Reader.

- **Microsoft Word (.docx):** You can prepare a signable Microsoft Word 2007, or later version, document instead of a PDF. This method uses Microsoft Word to prepare a signable .docx file of the document instead of a PDF. The .docx file version of the document is intended for signing purposes only. Because this option requires all internal and external users to use Microsoft Word 2007, or later version, for signing purposes, you might find that it is more limited than using a PDF where the Adobe Reader is more readily available to all internal and external users.
- **Internal and external signatures:** PeopleSoft Supplier Contract Management enables the collection of internal and external signatures. Depending on the organizations needs the document administrator can determine when to prepare documents for signature and when to collect them. For example, for a given document type, you can specify to collect internal signatures before, during, or after approval. And, likewise, send documents to contacts and dispatch documents to collect external signatures before or after approvals, and before or after internal signatures.
- **Online external signatures:** As part of setting up digital signatures, you can also optionally define a framework that includes suppliers in document collaboration and online review and approval processes including the ability to sign the document. This requires that you have a supplier-facing web site available for external users to access contract documents for collaboration, review, and signatures. You can also choose to configure the system so that external signatures are always collected when sending or dispatching a PDF using an email attachment. If you select this method, external users sign and send the PDF back to the administrator, who then uploads the signed document on behalf of the external user.
- **Visible and invisible signatures:** Visible signers are those signers whose signature labels appear on a contract document. You can only see an invisible signature in the signature properties of the document, and not in the document itself. You can use an invisible signature, for example, when you want to track a signature for non-repudiation purposes, but do not want to show the signature within the document itself.

## Methods Used to Create Signature Fields

You can add digital signature fields to a clause using these methods:

- **Generic signature fields for Adobe and Word signature methods.**

You use a generic signature field for a given signature role, such as contract specialist, director, or vice president.

When a contract document is ready for digital signature, it is converted to a PDF and Adobe Acrobat automatically creates signature fields when it finds the word *signature* followed by underscores using Adobe's Form Field Recognition feature.

When, for example, a director actually signs the signature field in a PDF, the signature information for the director can contain the visible details about him such as his name, title, and an image of his signature. This is the digital ID used in Adobe Acrobat. Using generic signatures are recommended because they reduce the maintenance of clauses and configuration of the system.

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**Note:** The PeopleSoft Financials sample database contains some sample Microsoft Word clauses named CL\_SAMPLE\_PDF\_SIGN1 (2, 3) for reference and use. These are sample clauses where signature fields have been inserted into Microsoft Word.

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- **Specific user-signature fields for Adobe and Word signature methods.**

This method for creating signature clauses provides each individual signer a unique signature field. You use rules to include the correct signature based on who the signer is for that document. This setup is not generally recommended because of long-term maintenance issues, but may work well if an organization typically has only a few specific signers for documents.

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**Note:** In Adobe Acrobat, an advantage of using specific user- signature fields for each signer instead of generic fields is that the signer's name appears within the PDF list of signers so they can click on their name to obtain the signature field. This is instead of checking for a generic field such as director. However, with generic signature fields, you can also have the specialist manually change the PDF to replace the title with the signer's name as part of the document signature preparation.

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- **Signature list on the document header versus signature fields in the document.**

Within Document Management a list of signers is specified for each contract document. The list can be defaulted for each contract administrator. This list controls if a user is to have access to the Sign Document button on the Document Management page for signing, as well as routing a document internally before or after approvals for signatures depending on configuration. Depending on the variability of digital signatures required for your various documents the setup for this may be simple or more complex rules driven. For example, a simple approach is to always include a single signature clause with the number of signatures in the file, because it will always match n number of signers within the document header list.

A slightly more complex way to include a signature could be to provide a wizard question specifying the number of signers to drive a rule including the write signature clauses. And, using a more sophisticated solution is to use or create your own rule that includes the correct signature clauses based on the number of signers specified for a given document.

If you are using Adobe Acrobat digital signatures, a signature field is created by typing the text *signature* followed by underscores. If you are using Microsoft Word digital signatures, a signature field in a clause is created by inserting a Microsoft Word signature line where you specify the signer's name, title, and email address.

- **Signature fields for the Adobe Sign signature method.**

Add signature fields to the document by entering Adobe Sign ‘text tags.’ Adobe uses the text tags to create signature fields in the PDF. These are some common text tags you can add to your document:

<b>Text Tag Type</b>	<b>Required Text Tag Structure</b>	<b>Example</b>
Signature field	<p>{{_es_signerN_signature}}</p> <p>where N is variable, representing the placement order within the document.</p>	<p>{{_es_signer1_signature}}</p> <p>{{_es_signer2_signature}}</p>
Signature field with email address for a signer	<p>{{_es_signerN_signatureblock}}</p> <p>where N is variable, representing the placement order within the document.</p>	<p>{{_es_signer1_signatureblock}}</p> <p>{{_es_signer2_signatureblock}}</p>

<b>Text Tag Type</b>	<b>Required Text Tag Structure</b>	<b>Example</b>
Initials field	{{_es_signer $N$ _initials}} where $N$ is variable, representing the placement order within the document.	{{_es_signer1_initials}} {{_es_signer2_initials}}

You must add a numerical value to each signature field when there is more than one field in a document; this creates unique signature fields.

If you do not add signature fields to the document, Adobe Sign automatically adds a signature block for each signer on a new page.

- **Signature fields for the DocuSign signature method.**

DocuSign ‘anchor tags’ can be added to documents as placeholders for signatures and names. When you send the document for signing, the appropriate tags are associated with signers and placed in the specified locations in the PDF document. These are the anchor tags you can add to your document:

<b>Anchor Tag Type</b>	<b>Required Anchor Tag Structure</b>	<b>Example</b>
Signature	\s $N$ \ where $N$ is variable, representing the placement order within the document.	\s1\ \s2\
Name	\n $N$ \ where $N$ is variable, representing the placement order within the document.	\n1\ \n2\
Title	\t $N$ \ where $N$ is variable, representing the placement order within the document.	\t1\ \t2\
Date Signed	\d $N$ \ where $N$ is variable, representing the placement order within the document.	\d1\ \d2\

The position of the signature field for each signer is determined by the anchor tags within the document. DocuSign automatically guides signers to the location of the signature field.

If the document contains more anchor tags than signers, DocuSign will not create signature fields for the superfluous tags.

If there are more signers than anchor tags, signers without a designated signature field can sign anywhere in the document.

## Adobe Digital Signature Fields

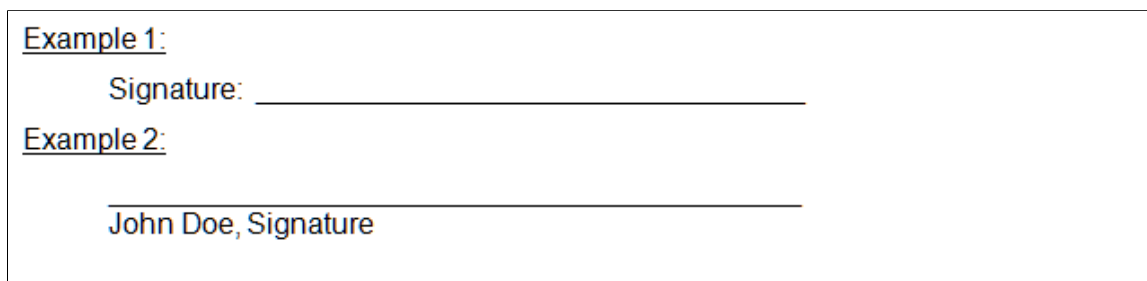
Previous releases of PeopleSoft Supplier Contract Management required the use of postscript files for Adobe digital signatures. This method has been changed and is no longer needed to use postscript files.

To create a signature field for Adobe Acrobat documents, you enter the word *signature* followed by underscores when editing a clause, section, or contract document in Microsoft Word. When a contract document is prepared for signature, the system converts the document to a PDF and the contract administrator uses the auto-detect form field recognition feature in Adobe Acrobat to create the signature fields. These Adobe Acrobat digital signature fields can then be signed by signers using Adobe Digital IDs.

To create a signature field, type the word *signature* followed by underscores into a Microsoft Word document. When a contract document is ready for digital signature, it is converted to a PDF and Adobe Acrobat automatically creates signature fields when it finds the word *signature* followed by underscores using Adobe's Form Field Recognition feature.

Examples of signature fields in word documents:

This example illustrates Examples of Adobe Digital Signatures.



---

**Note:** The contract administrators who prepare the contract documents for Adobe digital signatures need to have Adobe Acrobat installed on the client machines.

---

## Microsoft Word Digital Signatures

You create a signature field in the Microsoft Word document using the Microsoft Word - Signature Line feature. So, if you were to create a signature clause, edit the clause content in Microsoft Word, and insert the signature line object. When the entire contract document is prepared for signature, it will be converted to .docx file format where signers will be able to sign the document. The .docx file format is intended for signatures only and the .xml file remains as the editable document. After the signature process begins, the .xml contract document is in a read-only state and cannot be modified. The system will not display the **Edit Document** button.

The setup for Microsoft Word signatures requires that you edit the Microsoft Word versions of the signature clauses using Microsoft Word 2007, or later version, but in the .xml format, adding the appropriate signature fields within the clause. Generic signatures are recommended when possible. When using Microsoft Word to capture signatures you use generic signatures instead of using postscript files that were previously described for Adobe/PDF signature method.

---

**Note:** The requirement for using the .docx format is that all signers, both internal users and external suppliers, must use Microsoft Word 2007, or later version. Unlike the PDF format the .docx format is still a Microsoft Word document and in certain statuses can be edited. After the first signature, for example, the contract specialist, is placed on the document and the .docx file can no longer be modified itself unless all signatures are cleared. Therefore, you should take care when using a .docx format to ensure that the contract specialist signs the document as part of the prepare process, and as a follow-up ensure that the document signatures have not been cleared by other users.

---

Additionally, you must set the installation option **Signature Method** field value to *Word* and setup for installing Microsoft Word 2007, or later version, on the server.

See [Setting Up PeopleSoft Integration Broker for Microsoft Word](#).

---

## Setting Up Digital Signatures

This section provides information on how to set up these digital signatures:

- Adobe and Word signature methods
- Adobe Sign signature method
- DocuSign signature method

## Setting Up Digital Signatures for the Adobe and Word Signature Methods

Complete these steps to set up digital signatures for the Adobe and Word signature methods:

1. Setup PeopleSoft Integration Broker to enable rendering of signature documents.

---

**Note:** Consider verifying your setup for server processing on a Windows machine (running on a Microsoft operating system) by performing a trial run on the Installation Options – Supplier Contract Management page.

---

2. Update installation options to enable internal and external signatures and indicate the signature method.

Using installation options, you enable digital signatures for the PeopleSoft Supplier Contract Management installation. You can select to use either Adobe Acrobat or Microsoft Word 2007, or later version, for digital signatures. For Adobe digital signatures, there are two options. The *Adobe (deprecated)* is to use with Adobe Acrobat to render a signature in PDF and *Adobe (Word)*.

You must enable digital signature in order to change the signature method option. To render PDF, the deprecated method uses Adobe Acrobat and requires software to be installed on the windows machine where the application server is set up to perform the rendering. You can then disable digital signature if you are planning to implement it.

In addition, you can update the generic templates used for signatures to meet the organizations needs. These templates are the email messages associated with the digital signature process. You use the Generic Template Definition page to make changes to the instructions and message text. To access the page, select PeopleTools > Workflow > Notifications > Generic Templates.

---

**Note:** You must enable digital signatures on the Installation Options page before you can use them with document types.

---

3. Enable internal and external signatures for appropriate document types.

If you are using document types as recommended, you must enable digital signatures for each document type requiring digital signatures. You cannot change the digital signature method. The system automatically uses the installation setting. Additionally, you can set document types to control whether to capture signatures before, during, or after approvals.

See [Document Type Page](#)

4. Set up the supplier-side to enable online signatures.

The system enables the email dispatch of a signature file for the supplier without having to setup supplier portal access. However, when you enable supply-side integration with PeopleSoft Supplier Contract Management, you can optionally have the supplier access the file for signing directly online. When taking this approach you use the Send to Contacts and Dispatch functionality to notify the supplier using email with URLs that provide supply-side users with links directly to the supply-side web site.

See [Signing External Documents](#)

5. Create sections and clauses with signature placeholders.

The system supplies some samples of this within the sample database CL\_SAMPLE\_PDF\_CLAUSE1, 2, and 3 for reference.

6. Add signature placeholders sections and clauses to document configurators.

7. Add a document that uses the digital signatures.

This includes adding or defaulting signers to the document header and creating the authored document that can also use rules to determine proper signature clauses. Also, prepare the document for signatures and route it to each signer through the internal and external signature processes.

To map supplier-side users to a contract, use the Supplier - Contacts page to define external contacts for signing.

The routing and signing process is described in the Documents Using Digital Signatures topic.

## Enabling Usage Rights for Adobe Reader

These steps describe what a document administrator needs to do with a prepared Adobe PDF so that a signer can use Adobe Reader to electronically sign a prepared contract document. The signature fields with underscores need to be converted to digital signatures fields so that signers can sign the document. After a contract document is prepared for Adobe digital signature, the contract administrator needs to do the following:

---

**Note:** After a PDF is created for digital signatures, the document administrator who has to extend usage rights to Adobe Reader users to sign document needs to run an extra step in Adobe Acrobat to convert the *signature* underline fields to Adobe signature fields that can be signed

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1. In Adobe Acrobat, select **Advanced >Accessibility >Run Form Field Recognition**.

Acrobat will convert all underscores that have the word *signature* in them

2. Delete any form fields that do not require user input by clicking inside the field.

This example illustrates the Run Form Field Recognition page in Adobe Acrobat.

In the example page shot, you would highlight *Title 2* and click the Delete button.

3. The contract administrator can edit the properties for each signature field to add a name and title, and add additional signature fields with hidden signatures. To do this, position the cursor inside the signature field, right-click, and select *Properties*.
4. When editing is complete, click the **Close Form Editing** button (top/right).

Adobe displays the signature fields that will appear in the PDF:

This example illustrates Adobe Signature fields.

5. (Optional) the document administrator can certify documents prior to sending the contract for additional signatures.

In Adobe Acrobat, select **Advanced >Sign and Certify (visible or invisible signature)**.

6. Extend usage rights for users to use Adobe Reader to view and sign PDFs.

In Adobe Acrobat, select **Advanced >Extend Features in Adobe Reader**.

The PDF is now ready to be routed for digital signatures.

## Setting Up Digital Signatures for the Adobe Sign Signature Method

Complete these steps to set up digital signatures for the Adobe Sign signature method:

1. Setup PeopleSoft Integration Broker to enable rendering documents in PDF.

See the *PeopleTools Integration Broker* documentation.

2. Import required certificates on the local gateway server.

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**Note:** For more information see My Oracle Support, Note 1923479.2. Select the Supplier Relationship tab, Update Image 9.2.034, 30174722\_Installation.

---

3. Update installation options to enable signatures and specify the **Adobe Sign** signature method using the Installation Options – Supplier Contract Management page.
4. Using the Configure OAuth page, get OAuth access token to use with Adobe Sign REST APIs.
5. Enable signatures for appropriate document types using the Document Type page and the Enable Signatures option.

See also:

[Installation Options - Supplier Contract Management Page](#)

[Configure OAuth Page](#)

[Electronic Signature Account Page](#)

[Document Type Page](#)

## Setting Up Digital Signatures for the DocuSign Signature Method

Complete these steps to set up digital signatures for the DocuSign signature method:

1. Update installation options to enable signatures and specify the **DocuSign** signature method using the [Installation Options - Supplier Contract Management Page](#)
2. If you choose to use REST APIs for DocuSign, activate the service operations listed for DocuSign REST service in the [Service Operation — General Page](#).
3. Specify DocuSign account information in the [Electronic Signature Account Page](#)
4. Enable signatures for appropriate document types by using the Enable Signatures option in the [Document Type Page](#).

## Pages Used to Set Up Digital Signatures for the Adobe Sign and DocuSign Signature Methods

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Installation Options - Supplier Contract Management Page</u>	INSTALLATION_CS	Define installation options and digital signature method for PeopleSoft Supplier Contract Management.
<u>Service Operation — General Page</u>	(IB_SERVICE_REST	Activate the service operations for DocuSign REST service (if you choose to use REST APIs for DocuSign).
<u>Electronic Signature Account Page</u>	CS_ESIGN_SETUP	Specify DocuSign account information. Activate service operations to use with Adobe Sign.
<u>Document Type Page</u>	CS_DOCUMENT_TYPE	Define document types.
<u>Configure OAuth Page</u>	CS_ESIGN_OAUTH	OAuth configuration to get access token required to use REST APIs to manage documents for signing.

### Service Operation — General Page

Use the Service Operation — General page (IB\_SERVICE\_REST) to activate the service operations used for DocuSign REST service (if you choose to use REST APIs for DocuSign) and Adobe Sign.

By default, PeopleSoft uses SOAP APIs to integrate with DocuSign, and the service operations are already activated. Hence no action needs to be taken.

For more information on Service Operations, see the product documentation for *PeopleTools: Integration Broker*.

Navigation:

**PeopleTools >Integration Broker >Integration Setup >Service Operations**

This example illustrates the fields and controls on the Service Operation — General page. You can find definitions for the fields and controls later on this page.

General

Routings

Service Operation

REST Method

\*Operation Description

Operation Comments

Owner ID

Operation Alias

Used with Think Time Methods

**REST Resource Definition**

REST Base URL

URI Template Format Example: weather/{state}/{city}?forecast={day}

**URI**

1-1 of 1

Index	Template	Validate	Build		
1	<input type="text" value="/audit_events"/>	Validate	Build	+	-

Document Template  [View Message](#)

**Default Service Operation Version**

\*Version   Default  Active

Version Description

<b>Field or Control</b>	<b>Description</b>
<b>Service Operation</b>	<p>Enter the name of the service operation to view, or click the Lookup button to search for and select an operation.</p> <p>The following service operations are available for DocuSign:</p> <ul style="list-style-type: none"> <li>• DS_ENVELOPES_GET</li> <li>• DS_ENVELOPES_POST</li> <li>• DS_ENVELOPES_PUT</li> <li>• DS_LOGIN_GET</li> <li>• DS_OAUTHTOKEN_POST</li> <li>• DS_OAUTH_GET</li> </ul> <p>The following service operations need to be activated to use with Adobe Sign:</p> <ul style="list-style-type: none"> <li>• AS_AGREEMENT_DELETE</li> <li>• AS_AGREEMENT_GET</li> <li>• AS_AGREEMENT_PUT</li> <li>• AS_AGREEMENT_POST</li> <li>• AS_BASEURIS_GET</li> <li>• AS_OAUTHTOKEN_POST</li> <li>• AS_UPLOADFILE_POST</li> <li>• AS_USER_GET</li> </ul>
<b>Active</b>	Select to activate the service operation.

## Electronic Signature Account Page

Use the Electronic Signature Account page (CS\_ESIGN\_SETUP) to specify DocuSign account information.

---

**Note:** Oracle PeopleSoft has migrated from SOAP APIs to Adobe Sign REST APIs to manage documents for signing. Users need to review updates from Adobe Sign on deprecation of SOAP APIs. The set up page has been replaced with Configure OAuth page to configure authorization details for Adobe Sign.

---

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Electronic Signature Setup > Electronic Signature Account**

## Electronic Signature Account page for DocuSign

**Electronic Signature Account**

e-Signature Provider DocuSign

Owner VP1

DocuSign Environment

Account Email

Password

Confirm Password

**Account Users** | 1 of 1

User	Name	*Email
1 <input type="text" value="ABROWN"/>	Aaron Brown	<input type="text" value="abrown@provider.com"/>

**Default Email Settings**

Message

Use the **DocuSign Environment** option to indicate whether the DocuSign account is used with your test or production environment. Options are *Demo* and *Production*. When you select the Demo option, documents you create will have a watermark stamped on them to indicate they are used for testing.

Enter the account information for the DocuSign user and click the **Verify Account Information** button to authenticate account information.

Use the **Account Users** group box to specify users added to the DocuSign account.

---

**Note:** You are not adding users here; users are added in the DocuSign account.

---

## Configure OAuth Page

Use the Configure OAuth page (CS\_ESIGN\_OAUTH) to authorize API access by account administrator. The configuration starts with user authentication by logging into Adobe Sign account and then grant requested permissions to manage documents for signing. At the end of the process, an access token is returned to Configure OAuth page. Administrator will complete the process by entering users in the account, if any, and then save the page.

---

**Note:** See the document ‘30174722\_Installation’ on the [PeopleSoft FSCM 9.2: Update Image Documentation](#) My Oracle Support page for instructions to configure OAuth access token.

---

Navigation:

**Supplier Contracts >Supplier Contracts Setup >Configure OAuth**

This example illustrates the fields and controls on the Configure OAuth page. You can find definitions for the fields and controls later on this page.

### Configure OAuth

User VP1

Account Email

Client ID

Client Secret

Redirect URI

#### Account Users

1-1 of 1

User	Name	*Email		
🔍		<input type="text"/>	+	-

#### Default Email Settings

Message

<b>Field or Control</b>	<b>Description</b>
<b>Account Email</b>	Enter Adobe Sign account email ID.
<b>Client ID</b>	Enter Client ID given in the Adobe Sign API application.
<b>Client Secret</b>	Enter Client Secret given in the Adobe Sign API application.
<b>Redirect URI</b>	Displays URI to redirect user back to the PeopleSoft Configure OAuth page.
<b>Account Users</b>	Associate PeopleSoft user ID to each user added to the Adobe Sign account with permission to manage documents for signing.
<b>Message</b>	Enter the default text for email message that will be used in the email notifications sent to signatories.

<b>Field or Control</b>	<b>Description</b>
<b>Access Token</b>	Click button to get OAuth Access Token. Make sure the Redirect URI is copied to Adobe Sign API application. User will be authenticated and asked to grant permissions for API application to manage documents. Once authorized by user, an authorization code is returned to Configure OAuth and the code can then be used to exchange for an access token and refresh token. When token expires, refresh token is used to get new token to make REST API requests.

---

## Working with Digital Signatures

Digital signatures are cryptographically-based signature assurance schemes that make it possible for PeopleSoft Supplier Contract Management to provide full online contract document processing. They are often used in the context of public key infrastructure (PKI) schemes in which the public key used in the signature scheme is tied to a user by a digital identity certificate issued by a certificate authority, usually run by a third-party commercial firm.

### Adobe and Microsoft Word Signature Methods

The Adobe and Microsoft Word signature methods support the ability to lock the Microsoft Word version of a contract and prepare an equivalent and separate PDF file or .docx file that the system uses to capture signatures only. You can run this prepare process and capture signatures in an internal or external order, as well as before, during, or after approvals for capturing internal signatures. After the contract or amendment has been executed, the Microsoft Word version of the latest document is made available again for the next amendment cycle.

---

**Note:** When you have the Document Types check box deselected on the Installation Options page, you cannot control the collection of digital signatures, such as before, after and during approvals, the same as you can when you have the check box selected.

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**Note:** Preparing your system for digital signing and setting up digital signatures is described in the [Understanding PeopleSoft Supplier Contract Management Setup](#) topic.

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**Note:** The requirement for using the .docx format is that all signers, both internal users and external suppliers, must use Microsoft Word 2007, or later version. Unlike the PDF format the .docx format is still a Microsoft Word document and in certain statuses can be edited. After the first signature, for example, the contract specialist is placed on the document and the .docx file can no longer be modified itself unless all signatures are cleared. Therefore, you should take care when using a .docx format to ensure that the contract specialist signs the document as part of the prepare process, and as a follow-up ensure that the document signatures have not been cleared by other users.

---

Internal and external users (supplier-side) who intend to sign a contract document or amendment can use digital signatures. You can route a document intended for digital signatures in several ways:

- Internally where you can configure to route the document manually using a sequential list of users before, or after approvals or both before and after approvals. You can also route the document during



approvals in which case any approver designated as required to sign will be provided a button to do so during approval.

- Externally where you can capture needed signatures of prepared document before internal approvals by using the Send to Contacts button, or after approvals using the Send to Contacts or Dispatch buttons. When an external portal is enabled for suppliers, they can sign the document online instead of passing documents through emails.

The document type along with installation options control how the system processes and routes documents.

## Adobe Sign and DocuSign Signature Methods

The Adobe Sign and DocuSign signature methods support cloud-based document approval lifecycle management. With these signature methods you can route documents, guide signatures and approvals, generate notifications, and store signed documents in a secure, cloud-based environment. The contract specialist can easily prepare the document (create signature fields) and route the document in one step—there is no need to export the document for preparation and re-upload it into the PeopleSoft application.

In addition, these signature methods enable you to employ multiple methods for authenticating the identity of signers—including password and social media account login—and enables document signing without logging into the PeopleSoft application.

## Signing Documents Using the Adobe and Word Signature Methods

This topic describes the process for using digital signatures with Adobe. The processes for Adobe PDF signatures and Microsoft Word 2007, or later version, are similar. However, the features within each process regarding signing a document may be different as specified by the software suppliers. When using Adobe PDF, most users should require only the Adobe PDF Reader and a digital certificate to sign a document after an administrator has enabled the signature rights using Acrobat Professional. Likewise, using a Microsoft Word docx format for signatures means each signer must be using Microsoft Word 2007, or later version, to add a signature. When using Microsoft Word 2007, or later version, the .docx format is used only for the purpose of a signature file. The Microsoft Word XML Document is always the file format used for editing.

After setting up and preparing to use digital signatures, you prepare and route documents using these steps:

1. Create a document with internal or external signing requirements.
2. Obtain any required approvals before sending the document for internal signatures.

This depends on whether the document type requires approvals before signatures.

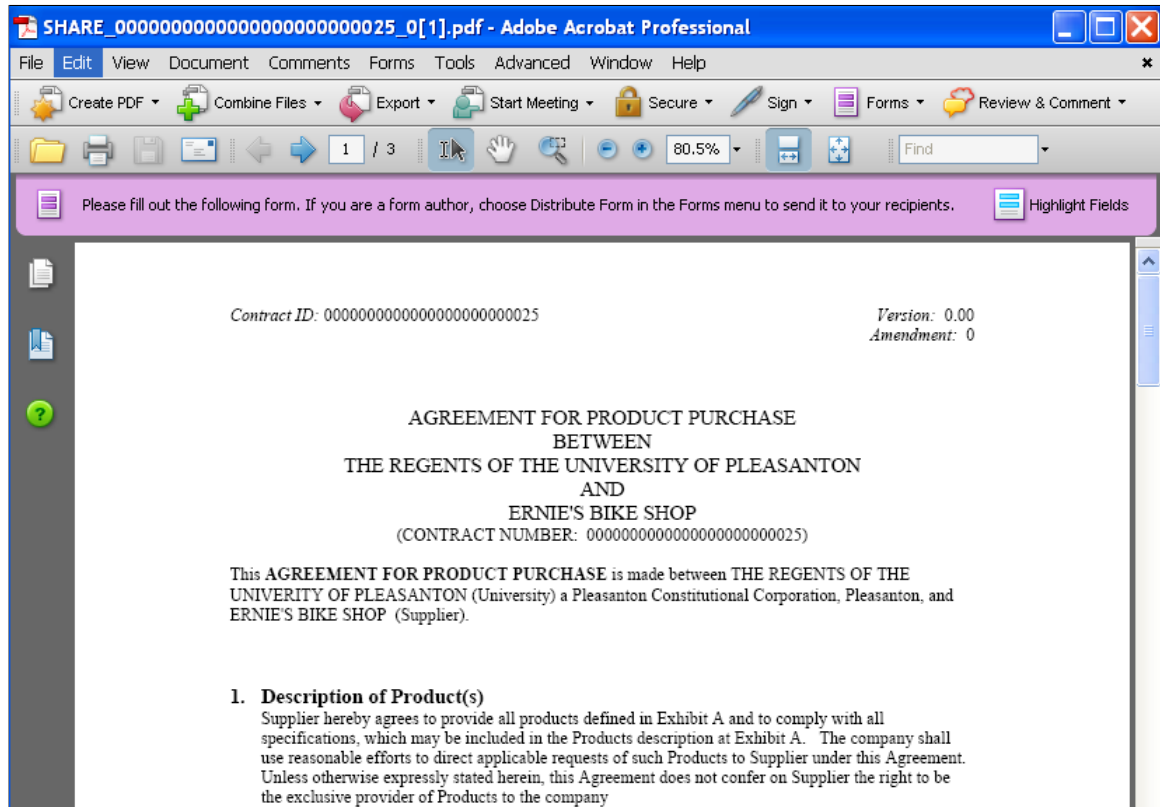
3. Click the **Prepare Document for Signature** button on the Document Management page.

This also enables you to validate the internal and external lists of signers and to indicate if a signer is a visible signer. Click the **OK** button to convert the document into the signature format. The system creates the document, checks it out, launches the file and displays a message indicating what you should do to the file depending on whether it's a .docx or PDF. In the case of an Adobe PDF, you enable the usage rights for users with Adobe Reader so that they can sign documents. In the case of Word 2007 .docx file, you should certify the document and make the first signature to prevent

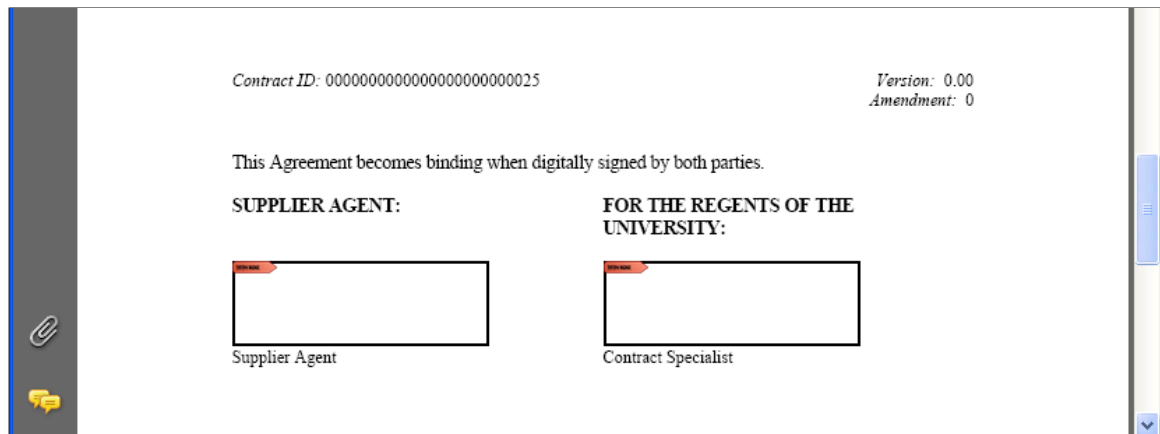
editing of the document. In both cases the document is locked until the specialist checks in a certified document.

**Note:** If you are creating an Adobe PDF, the system displays a message that the document is pending certification that you need to enable Adobe usage rights. To ensure that the system opens the document in an Adobe PDF format, launch Adobe Acrobat Professional from the Start menu. After accessing the application, select **Edit > Preferences > Internet** and deselect the **Display PDF in Browser** check box. The setting applies to both Adobe Acrobat Professional and Standard and Adobe Reader to prevent the system from opening the PDF in a browser format.

This screen shot illustrates how a converted PDF file appears with its signature blocks:



This is the second half of the example.



The digital signature blocks appear at the bottom of the page or wherever you add your signature fields. The system applies the visible digital signature to these blocks when the appropriate users sign the document.

See [Methods Used to Create Signature Fields](#)

4. Save the file.
5. Click the **Upload Prepared Document** button on the Document Management page.

You can also view the document or cancel the signature process after preparing the document and before uploading it. After the document is uploaded, the system updates the document status to Prepared/Awaiting Signatures and provides the signing details for the document along with the options that appear next:

This example illustrates the fields and controls on the Document Management page with signing details.

The screenshot displays the 'Signing Details' section of a document management interface. At the top, it shows the 'Internal Signature Status' as 'Pending Signatures' and the 'External Signature Status' as 'Not Initiated'. Below this, a document ID and title are shown: '[Calvin Roth 2009-08-26-05.43.08.000000] Document Prepared for Signatures'. The interface is divided into three main columns of controls:

- View and Edit Options:** Includes buttons for 'View Document', 'Sign Document (On Behalf)', and links for 'Add Attachments/Related Documents', 'Document Modification Summary', and 'Document Version History'.
- Review and Approval:** Includes buttons for 'Preview Approval', 'Submit for Approval', 'Bypass Approvals', and 'Route for Internal Signatures', along with links for 'Internal Contacts/Signers', 'External Contacts/Signers', and 'Document View Access'.
- Other Document Actions:** Includes buttons for 'Send to Contacts', 'Cancel Signature Process', and 'Deactivate Document', along with a 'Generation Log' link.

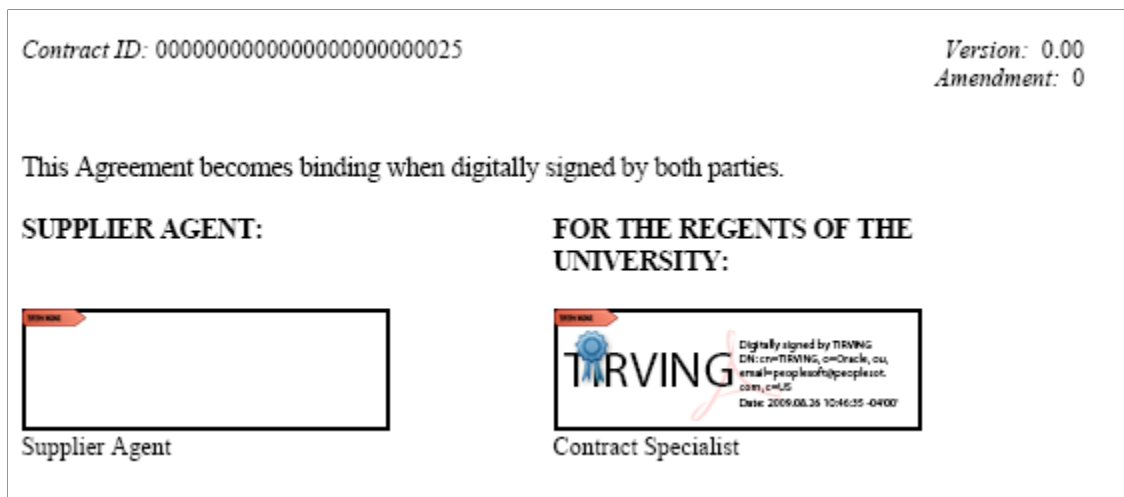
Contract administrators can use the **Sign Document (On Behalf)** button to access the document and sign it on behalf of another internal user. Click the **Route for Internal Signatures** button to send the document to internal users who are listed as signers for the document.

6. Click the **Route for Internal Signatures** button.

See [Route for Internal Signatures Page](#).

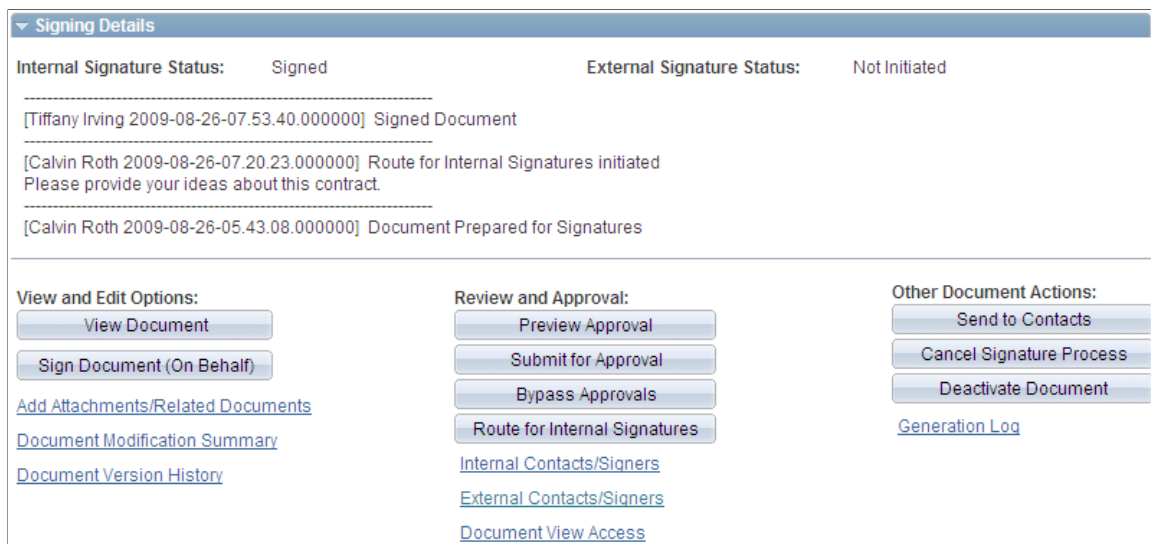
7. The internal signer accesses the document and applies the digital ID.

This example illustrates the fields and controls on the Adobe PDF signature. You can find definitions for the fields and controls later on this page.



- When the last internal signer signs the document, the system updates the internal signature status to Signed as shown in this example:

This example illustrates the fields and controls on the Document Management page with internal signature completed. You can find definitions for the fields and controls later on this page.



Depending on the signature flow, the contact administrator can, for example, send the document for internal approvals or send it for internal signatures before sending it to external users.

- The contract administrator routes the document to external signers by clicking the **Send to Contacts** or **Dispatch** button, depending on where in the life cycle they wish to gather external signatures. .
- Select *Email and Online Signatures* in the **Delivery Method** field.

This option is intended for use with the supplier portal. The system automatically inserts a URL in the **Description** field. You use this method to send the document to an external user to sign online. You

can also lock the document and route it offline using email and upload it after receiving the signed document.

This example illustrates the fields and controls on the Send to Contacts page with URL for external users. You can find definitions for the fields and controls later on this page.

### Send to Contacts

SetID: SHARE

Vendor: ERNIE'S BIKE SHOP

Contract ID: 000000000000000000000000000025

---

Version: 0.02

Amendment: 1

Administrator: Calvin Roth

Email: croth\_us001@yahoo.com

\*Delivery Method: Email and Online Signatures

Send as File Type: Adobe PDF Preview PDF

The Send as File type option only applies to Email Delivery Method and when signature document is not available. Otherwise, the prepared signature document will be sent regardless of file type specified here.

**Files To Be Sent**

Original Executed Document

Current Document

Amendment Files

Most Recent Only

All

Attachments

Related Documents

---

Set to Checked Out

Send Copy to Administrator

**Subject**

Documents for Review/Signature - Contract ID: 000000000000000000000000000025

**Description:**

This email contains information for contract: SHARE / 000000000000000000000000000025.  
Please log in using the following URL to begin the signing process:  
[http://rtdc78009qaemt.us.oracle.com:8001/psp/e910r71bnt/SUPPLIER/ERP/c/CONTRACT\\_MGMT\\_SUPPLIER\\_CS\\_DOC\\_SUPP.GBL?](http://rtdc78009qaemt.us.oracle.com:8001/psp/e910r71bnt/SUPPLIER/ERP/c/CONTRACT_MGMT_SUPPLIER_CS_DOC_SUPP.GBL?)

Selected	Contact ID	Name	Title	Email ID	Description
<input checked="" type="checkbox"/>	1	Sam Walker	VP	peoplesoft@peoplesoft.com	Ad Hoc Contact

Select All Contacts   Clear All Contacts

OK   Cancel

When suppliers receive the email, they can link back to the supplier portal and sign the document.

11. Click **OK**.

The system updates the Document Management page with the new signature process update as appears in this example:

This example illustrates the fields and controls on the Document Management page with signing updates. You can find definitions for the fields and controls later on this page.

Document Management		<a href="#">Return to Document Search</a>	
SetID:	SHARE	Contract ID:	<a href="#">000000000000000000000000000025</a>
Vendor:	ERNIE'S BIKE SHOP		
Document Type:	Standard Contract Document		
Description:	Volume Purchase Contract		
Administrator:	Calvin Roth		
Sponsor:	Department:		
Version:	0.00	Created On:	08/25/09 3:33PM <a href="#">Document Details</a>
Status:	Collaborated	Last Modified On:	08/26/09 8:25AM
<input type="button" value="Cancel Supplier Signing"/>			
<b>** Pending Supplier's Signature **</b>			
<b>▼ Signing Details</b>			
Internal Signature Status:	Signed	External Signature Status:	Pending Signatures
-----			
[Calvin Roth 2009-08-26-08.25.14.0000000] Sent to Supplier for Signatures			
-----			
[Tiffany Irving 2009-08-26-07.53.40.0000000] Signed Document			
-----			
[Calvin Roth 2009-08-26-07.20.23.0000000] Route for Internal Signatures initiated Please provide your ideas about this contract.			
-----			
[Calvin Roth 2009-08-26-05.43.08.0000000] Document Prepared for Signatures			
-----			
View and Edit Options:	Review and Approval:	Other Document Actions:	
<input type="button" value="View Document"/>	<a href="#">Internal Contacts/Signers</a>	<a href="#">Generation Log</a>	
<a href="#">Add Attachments/Related Documents</a>	<a href="#">External Contacts/Signers</a>		

The updated information indicates that the document has been sent to an external user and is pending his signature. To stop the signing process for the supplier, click the **Cancel Supplier Signing** button.

You can define the level of external user access to executed documents. You use installation options to indicate if the user can view the document online, view only executed versions or all collaborated and executed documents.

See [Signing External Documents](#).

12. After the external user signs and uploads the document, the system updates the document status.

The next example shows that the internal and external signature statues are Signed:

This example illustrates the fields and controls on the Document Management page with signing details. You can find definitions for the fields and controls later on this page.

Signing Details		
Internal Signature Status:	Signed	External Signature Status: Signed
-----		
[Supplier 2009-08-26-09.34.07.000000] External User Signed Document		
-----		
[Calvin Roth 2009-08-26-08.25.14.000000] Sent to Supplier for Signatures		
-----		
[Tiffany Irving 2009-08-26-07.53.40.000000] Signed Document		
-----		
[Calvin Roth 2009-08-26-07.20.23.000000] Route for Internal Signatures initiated Please provide your ideas about this contract.		
-----		
[Calvin Roth 2009-08-26-05.43.08.000000] Document Prepared for Signatures		
-----		
View and Edit Options:	Review and Approval:	Other Document Actions:
<a href="#">View Document</a>	<a href="#">Preview Approval</a>	<a href="#">Send to Contacts</a>
<a href="#">Sign Document (On Behalf)</a>	<a href="#">Submit for Approval</a>	<a href="#">Cancel Signature Process</a>
<a href="#">Add Attachments/Related Documents</a>	<a href="#">Bypass Approvals</a>	<a href="#">Deactivate Document</a>
<a href="#">Document Modification Summary</a>	<a href="#">Route for Internal Signatures</a>	<a href="#">Generation Log</a>
<a href="#">Document Version History</a>	<a href="#">Internal Contacts/Signers</a>	
	<a href="#">External Contacts/Signers</a>	
	<a href="#">Document View Access</a>	

After a contract document is signed by external and internal user, you can continue with any other required actions to complete the document, or if needed, send it to the supplier user again.

## Signing Internal Documents Using Digital Signatures from the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to sign internal documents using digital signatures.

Navigation:

Click **Worklist** on the Home page, select the *Sign Review* value in the **Work List Filters** field, and click the document link.

This example illustrates the fields and controls on the Document Management page for internal signers. You can find definitions for the fields and controls later on this page.

### Document Management [Return to Document Search](#)

SetID:	SHARE	Contract ID:	<a href="#">000000000000000000000000000029</a>
Vendor:	ERNIE'S BIKE SHOP		
Document Type:	Standard Contract Document		
Description:	Purchasing Contracts		
Administrator:	Calvin Roth		
Sponsor:		Department:	

---

Version:	0.00	Created On:	08/26/09 3:15PM <a href="#">Document Details</a>
Status:	Approved	Last Modified On:	08/27/09 11:38AM

**\*\*Document is being Routed for Internal Signatures \*\***

▶ Signing Details

---

View and Edit Options:	Review and Approval:	Other Document Actions:
<input type="button" value="View Document"/> <input type="button" value="Sign Document"/> <input type="button" value="Decline Signing Document"/>		<a href="#">Generation Log</a>

[Add Attachments/Related Documents](#)  
[Document Modification Summary](#)  
[Document Version History](#)

The system displays the Document Management page with the document's status and provides a message that indicates the document is being routed for internal signatures. You must have a digital ID established to sign the document. You can establish the ID online using Adobe pages.

See [Understanding Digital Signatures](#).

Use the Signing Details section to view the internal and external signature statuses, view any comments, and view the routing history of the document.

<b>Term</b>	<b>Definition</b>
<b>Sign Document</b>	Click to launch the Microsoft Word .docx or Adobe PDF file and lock the file from any further actions. When the file opens, the system replaces this button with the <b>Upload Signed Document</b> button.
<b>Decline Signing Document</b>	Click to decline signing the document. The system displays the launch the Decline Signing Document page where you can enter comments about the action.

To sign a document:

1. Click the **Sign Document** button.

The system opens the digital signature file.



2. Apply the signature using either the Adobe or Microsoft Word format and save the document.
3. Click the **Upload Signed Document** button.

The system checks the document similar to how it runs the check-in process. It updates the document status and provides a date and time stamp for the signer's row in the internal list of signers page. Signers can still view the document and perform tasks that are available on the page.

To cancel all signatures, click the **Cancel Signature Process** button on the Document Management page. Confirm that you want to cancel the signature process and to enter comments about the cancellation.

To cancel supplier signatures, click the **Cancel Supplier Signing** button on the Document Management page. This cancels the external signature process.

To cancel internal signatures, click the **Stop Internal Signatures** button on the Document Management page. This cancels the internal signature process.

To decline to sign a contract document, click the **Decline Signing Document** button on the Document Management page. You can enter a reason in the comments section.

## Signing Documents Using the Adobe Sign and DocuSign Signature Methods

After setting up digital signatures for the Adobe Sign signature method or the DocuSign signature method, you prepare, route, and sign documents using these steps:

1. Create supplier contract document.
2. Click the **Prepare and Route for e-Signature** button on the Document Management page. This opens the Send Documents for Signing page and enables you to add signers and authentication criteria, route the document, and send for signing.

See:

[Methods Used to Create Signature Fields](#)

[Document Management Page](#)

3. Specify document recipients, add authentication criteria, and send documents for signing using the Send Documents for Signing page.

See [Send Document for Signing Page](#)

4. Click Send.

The contract document is prepared (signature fields added) and recipients are notified by email. The email includes a hyperlink to access the document.

Adobe Sign has settings for sequential or parallel signing. Signers are notified to sign in the order recipients are entered, or by the Signing Order field in case of sequential order.

5. Signers access the contract document using a hyperlink provided in the email generated in the previous step. Signers do not need to sign into the PeopleSoft application to access the document and can sign it using their mobile device if they wish.

If authentication criteria was established for a recipient, the recipient is guided to an authentication page after clicking the hyperlink. Recipients must provide the appropriate information to access the document.

If delegation is allowed, the signer will have the option to delegate someone else to sign the document. A new signer is added to the document with “delegate” role, and an email notification will be sent to delegated signer. The sender is notified as well. Either the original signer or delegate signer can sign the document. Once one of them signed the document, signing status for the signer and its delegate is marked as signed.

If the signer selects ‘*I will not e-sign,*’ the signing process is cancelled. The sender is notified by email and signers can no longer access the document. The signature process is cancelled for the signer and the document status is changed to ‘Aborted’ with the signer status set to ‘Recalled.’

6. The contract administrator can track the status of documents pending signature using the Electronic Signature Polling page or the **Get eSign Status** field on the Document Management page.

See:

[Methods Used to Create Signature Fields](#)

[Document Management Page](#)

## Common Pages Used to Sign Documents (All Signature Methods)

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Document Management Page</a>	CS_DOC_MAINT	Maintain documents and prepare and route documents for signing.
<a href="#">Internal Contacts List Page</a>	CS_DOC_INT_CONT_SP	Maintain internal contacts.
<a href="#">External Contacts Page</a>	CS_CONTACT_SEC	Maintain external contacts.
<a href="#">Send to Contacts Page</a>	CS_DOC_DSPTCH_SEC	Send documents to contacts.

## Pages Used with Adobe and Word Signature Methods

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Route for Internal Signatures Page</a>	CS_DOC_ROUTE_SIGN	Route documents for internal signatures.
<a href="#">Prepare Document for Signatures Page</a>	CS_DOC_PREPSIGN_SP	Prepare documents for signature.

## Route for Internal Signatures Page

Use the Route for Internal Signatures page (CS\_DOC\_ROUTE\_SIGN) to route documents for internal signatures.

Navigation:

Click the **Route for Internal Signatures** button on the Document Management page.

This example illustrates the fields and controls on the Route for Internal Signature page. You can find definitions for the fields and controls later on this page.

### Route for Internal Signatures

Below is the list of users who are listed as collaborators/signers. Those marked as required to sign, who have not yet signed the document, will be routed an email/worklist in signing order to sign the document. Changes made here will be saved for the document, not just for this particular routing cycle. Since the document is already prepared for signatures, adding/removing users from this list will NOT automatically update any signature fields within the document.

SetID: SHARE Contract ID: 0000000000000000000000029  
 Vendor: ERNIE'S BIKE SHOP

List of Signers							Customize   Find   View All   [?] [grid] First 1-2 of 2 Last	
*User	Description	Required to Sign Document	Visible Signer	Sign Order	Sign Status	Signed DTTM		
<input type="text" value="TIRVING"/> [magnifying glass]	Tiffany Irving	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="1"/>	Initial		+	-
<input type="text" value="VP1"/> [magnifying glass]	Kenneth Schumacher	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="2"/>	Initial		+	-

Instructions:

This page displays the internal users to whom the system will route the document for signature. The document is routed based on the sign order. You can add and delete signers. Use the **Instructions** field to provide additional signing information.

<b>Field or Control</b>	<b>Description</b>
<b>User</b>	Select a user to include for the internal signature routing.
<b>Required to Sign Document</b>	<p>Select to indicate that this internal user is required to sign the document. When you select this check box, the <b>Visible Signer</b> and <b>Sign Order</b> fields become available for entry. This field controls the visibility of the <b>Sign Document</b> button when the contract is routed to the user.</p> <p>When a user is not required to sign the document, then the user is considered a collaborator or viewer for the document and is not provided signing authority for the document. The user will not see the <b>Sign</b> button or be included in signature routings.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Visible Signer</b>	Select to indicate that this internal user's signature will be visible on the contract document. The field is available if the <b>Required to Sign Document</b> check box is selected. Visible signers are those signers whose signature labels appear on a contract document. Unlike visible signatures, you can also set up a signer with an invisible signature. You can only see an invisible signature in the signature properties of the document, and not in the document itself.
<b>Sign Order</b>	Select to indicate that this internal user's signature will be visible on the contract document. The field is available if the <b>Required to Sign Document</b> check box is selected. If a user is not a visible signer
<b>Signed Status</b>	Displays the status related to whether a signer has signed a document. Values include:  <i>Initial</i> <i>Signed</i> <i>Pending Signature</i> <i>Replaced by Alternate</i> <i>Signed by Proxy</i> <i>Marked as signed</i> <i>Declined</i>
<b>Signed DTTM</b> (signed date and time)	Displays when an internal signer has signed the document and indicates when the signer completed the document.

## Prepare Document for Signatures Page

Use the Prepare Document for Signatures page (CS\_DOC\_PREPSIGN\_SP) to preparing documents for signature.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Prepare Document for Signing** button on the Document Management page.

This page provides you a chance to verify the list of internal and external signers before dispatching the document. You can review the signers and make sure that the list contains the correct people who need to sign the document. Internal signers must be in this to have access to the document and see the correct buttons. If you want to change the list, use the Internal Contacts List page or External Contacts page to make the changes.

The display of this button on the Document Management page also depends on the document type settings. When internal signatures have been enabled, you can define when a document should be ready for signing, such as prior to, during, or after approvals.

Click **OK** to convert the document to its proper format, either Microsoft Word or Adobe PDF. If you are preparing a PDF, before others can sign the document, you need to enable the usage rights for Adobe Reader. You can enable this in the document that was launched, save the document and upload it back into the system. The document will remain checked out in your name until you upload the prepared document.

<b>Field or Control</b>	<b>Description</b>
<b>User</b>	Displays the user ID for an internal user. You use the Internal Contacts/Signers link on the Document Management page to define internal users collaboration and signing settings. The values you define on the Signing Settings tab appear on this page.
<b>Signing Title</b>	This field is optional and displays the title that was defined on the Internal Contacts List page for this user. You use the Signing Settings tab to define the signing title. The field is provided if you intend to bind it into the authored document.
<b>Visible Signer</b>	Displays as selected when this signer has been defined as a visible contract document signer on the Internal Contacts List page. Visible signatures appear on a contract document as opposed to invisible signers, who do not appear in the formal document.
<b>Sign Order</b>	Displays the sequence in which this user will sign the contract document. The system determines the signing order based on the order that you enter on the Internal Contacts List page. When routing the document manually for signatures outside of workflow approval, sign order values are used for sequential routing.

## External List of Signers

Use this grid box to view external signers and their attributes that have been defined on the External Contacts page. The values that you define on that page appear in this grid box.

## Pages Used with Adobe Sign and DocuSign Signature Methods

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Send Document for Signing Page</a>	CS_ESIGN_SEND	Specify document recipients, authenticate identity, and send documents for signing.
<a href="#">Electronic Signature Polling Page</a>	CS_ESIGN_SYNC	Obtain the status of documents pending signature.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Edit Recipients Page</u>	CS_ESIGN_SEND	Modify recipient information after a document has been submitted for signatures

## Send Document for Signing Page

Use the Send Document for Signing page (CS\_ESIGN\_SEND) to specify document recipients, authenticate identity, and send documents for signing.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the Prepare and Route for e-Signature button.

Send Document for Signing page (1 of 2)

Send Document for Signing

SetID SHARE Ad Hoc ID RK-EISGN3

Signing Order Sign based on Sign Order

Send To Recipients View All | 1 of 1

*Email ID	User	Sign Order	External Signer
aerickson@provider.com	AERICK! 🔍		<input type="checkbox"/> + -

Email Subject rk-eisgn3

Email Body Please sign by EOD this Friday. Thanks!

Send Cancel

Send Document for Signing page (2 of 2)

Send Document for Signing

SetID: SHARE      Ad Hoc ID: RK-EISGN3

Signing Order: Sign based on Sign Order

Send To: **Recipients** View All | [2] 1 of 1

Email Address	Identity Authentication	Country Code	Phone Number	Password
*Email ID aerickson@provider.com	Identity Verification Web-Identity Authentication			

Email Subject: rk-eisgn3

Email Body: Please sign by EOD this Friday. Thanks!

Send Cancel

Send Document for Signing page - DocuSign (1 of 2)

Send Document for Signing

SetID: SHARE      Contract ID: RK-CONT2

Supplier: BERNIE'S BIKE SHOP

Signing Order: Sign based on Sign Order

Send To: **Recipients** Personalize | View All | [2] 1 of 1

Email Address	Identity Authentication	User	Recipient Name	Carbon Copy	Sign Order	External Signer
*Email aerickson@provider.com		AERICK	Arthur Erickson	<input type="checkbox"/>		<input type="checkbox"/>

Subject: RK-CONT2

Message: Please sign by EOB this Friday. Thanks!

Send Cancel

Send Document for Signing page - DocuSign (2 of 2)

Send Document for Signing page with Attachments section

<b>Field or Control</b>	<b>Description</b>
<b>Signing Order</b>	Select a signing order for the document recipients: <ul style="list-style-type: none"> <li>• <i>Sign based on sign order</i>: This option works in conjunction with the <b>Sign Order</b> field to establish an order in which recipients sign the document.</li> <li>• <i>Sign in any order</i>: This option enables document recipients to sign in any order.</li> </ul>
<b>Email ID</b>	Enter an email address for the recipient.



<b>Field or Control</b>	<b>Description</b>
<b>User/Recipient Name</b>	Specify a signer for the document by entering their user ID.  The list of available users originate from users defined on the Internal Contacts List and External Contact List pages.
<b>Carbon Copy</b> (DocuSign signature method only)	Select this option to send a copy of the document to the recipient. If this option is selected for a recipient, they do not sign the document.
<b>Sign Order</b>	Enter a numerical value representing the signing order for the recipient. If you selected 'Sign based on sign order' for the <b>Signing Order</b> field, this field is mandatory.
<b>External Signer</b>	Select this option to indicate the signer is external to your organization.  If you select this option, the signer information is added to the External Contacts page.
<b>Identity Verification</b> (Adobe Sign signature method only)	Select a method to authenticate a signer's identity.  The authentication method is sent with the document when it is routed to Adobe Sign from PeopleSoft.  The following authentication methods are available: <ul style="list-style-type: none"> <li>• <i>Knowledge based authentication</i>: This option requires the signer to correctly answer a series of questions based on personal information.</li> <li>• <i>Phone Authentication</i>: This option requires the signer to correctly enter their phone number.</li> <li>• <i>Signing Password</i>: This option requires the signer to enter an encrypted password.</li> <li>• <i>Web-Identity Authentication</i>: This option requires the signer to log on to third party social media such as Facebook, LinkedIn, Twitter, and so forth.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<p><b>User Authentication</b>(DocuSign signature method only)</p>	<p>Select a method to authenticate a signer’s identity.</p> <p>The authentication method is sent with the document when it is routed to DocuSign from PeopleSoft.</p> <p>The following authentication methods are available:</p> <ul style="list-style-type: none"> <li>• <i>Access Code</i>: This option requires the signer to correctly enter an access code. The code can be up to 50 characters in length.</li> <li>• <i>ID Check</i>: This option requires the signer to correctly identify personal information based on public data sources, such as a previous address.</li> <li>• <i>Phone Call</i>: This option requires the signer to verify their identity by responding to a confirmation call.</li> <li>• <i>Text Message</i>: This option requires the signer to verify their identity by responding to a confirmation text message.</li> </ul>
<p><b>Attachments</b></p>	<p>Select the documents to be sent along with the contract document for signing.</p> <hr/> <p><b>Note:</b> Adobe Sign only accepts PDF, DOC, TXT and JPG file types as attachment. Documents of other file types is converted into a supported file format before it can be sent to Adobe Sign for signature. Multiple files can be attached.</p> <hr/>
<p><b>Send</b></p>	<p>Select to send the documents to the reviewer. The reviewer receives an email with the selected attachments.</p> <hr/> <p><b>Note:</b> When you click the Review Documents link in the email, the SOAP API displays the contract and additional documents, whereas the REST API displays only the contract document. The additional documents are appended at the end of the contract document. Click the links to view them.</p> <hr/>

## Electronic Signature Polling Page

Use the Electronic Signature Polling page (CS\_ESIGN\_SYNC) to obtain the status of documents pending signature.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Electronic Signature Polling >Electronic Signature Polling**

### Electronic Signature Polling page

Use the Electronic Signature Polling run control page to obtain the status of documents pending signature in order to update the document status in Supplier Contracts. You can search by a number of parameters, including **Adhoc ID**, **Document Type**, and **Document Status**.

Once the document has completed the signature process, the signed document will be retrieved back into Supplier Contracts from Adobe Sign.

PeopleSoft signature status is tracked at the document level and by signer.

### Edit Recipients Page

Use the Edit Recipients page (CS\_ESIGN\_SEND) to modify recipient information after a document has been submitted for signatures.

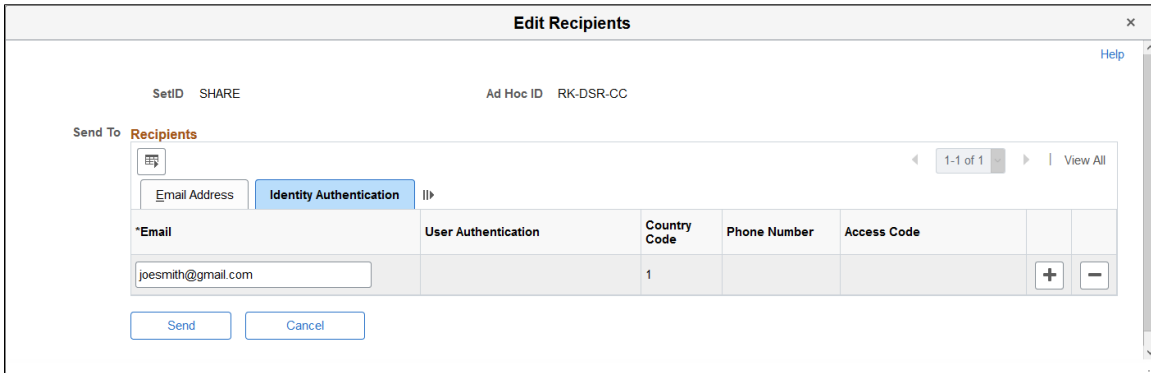
Navigation:

Click the **Edit Recipients** button on the Document Management page.

Edit Recipients page (1 of 2)

*Email	User	Recipient Name	Carbon Copy	Sign Order	External Signer
joesmith@gmail.com		JS	<input type="checkbox"/>	1	<input type="checkbox"/>

Edit Recipients page (2 of 2)



Use the Edit Recipients page to change the name or email address of a recipient, add or delete a signer, or change signing order.

If a recipient has signed the document, you cannot modify their information.

See the [Send Document for Signing Page](#) for field definitions.

<b>Field or Control</b>	<b>Description</b>
<b>Send</b>	<p>Click to confirm your changes.</p> <p>If you modify an email address or delete a signer, the system revokes their access to the document and sends a confirmation email to the original address (if it is their turn to sign the document).</p> <p>For new recipients, the system assigns the users a signing role and sends a confirmation email (if it is their turn to sign the document).</p>

# Setting Up and Using Document Approvals

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## Understanding Document Approvals

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**Note:** Supplier Contract Management delivers sample data that supports the document and clause approval processes as a starting point for configuring the system site. This sample data is documented in the [Setup Steps for PeopleSoft Approval Framework](#) topic.

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These topics discuss internal approvals for an entire document and for document components that include clauses, sections, and configurators. These approvals are managed either through the approval workflow process defined by the PeopleSoft Approval Framework or by user preferences and installation options. Completed documents and clause approvals are processed by approval framework, while sections and configurators are processed through options set up in user preferences and installation pages and then controlled by settings in the Manage Document Library component.

You can use internal document approvals in conjunction with contract collaboration that uses PeopleSoft workflow to notify collaborators of pending action, an ability to route the document for review, and a tracking mechanism to record who has seen the document and the contributions of each person as they happen. Collaboration differs from approval workflow in that it provides a single notification that is sent to all participants simultaneously for the cycle and no approval is recorded.

The approval processing of documents can also include enabling internal users to digitally sign documents at the same time they approve the document if the installation and document type settings dictates signatures are to be captured for this document during approvals. You can configure the system to capture internal signatures before, during, or after approvals.

See the Life Cycle Options section on the [Document Type Page](#).

To capture digital signatures as part of the approval process the document administrator must first have each internal signer listed within the Document Management component's Internal Contacts/Signers page. When the document is routed for approval to a user and that user is also identified as a signer then the Sign Document button appears enabling the user to sign the document while the document is pending her approval. If she approves the document without signing the document, the document can be resubmitted for approval, or the contract specialist can capture the signature after the document is fully approved.

**Note:** Collaborators and approvers, who have edit authority, can edit the Microsoft Word document during collaboration.

The document approval processing supports internal approvals for multiple internal users. External interaction for document review and signatures is possible using the External Collaboration feature for collaboration, and Send to Contacts or Dispatch features by selecting the *Online Signatures and Email* field value.

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See [Sending Documents to Internal and External Contacts](#).

## Related Links

[Understanding PeopleSoft Supplier Contract Management Workflow](#)

"Understanding Criteria for Approval Framework Processes" (Approval Framework)

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# Understanding PeopleSoft Supplier Contract Management Workflow

These topics discuss:

- Workflow in PeopleSoft Supplier Contract Management.
- PeopleSoft Approval Framework process.
- Approval framework users.
- Setup steps for PeopleSoft Approval Framework.
- Approval setup and transaction tables.

## Workflow in PeopleSoft Supplier Contract Management

Workflow is the process of routing clauses or documents for approval or collaboration. During the process, a set of approvers and reviewers carry out tasks that are related to a document or clause.

The PeopleSoft Supplier Contract Management application uses two workflow types and user preferences for processing different approval and review phases of a document and its components. The use of workflow is controlled using installation options. One type of workflow is the standard workflow feature that is common to many PeopleSoft applications. The system uses this standard workflow feature for collaboration. Collaboration provides basic simultaneous workflow notifications when collaboration is initiated by an administrator, as well as notifications back to the administrator when collaboration is complete. Collaboration workflow is best used when you route the document to various individuals during contract document development. Digital signatures can also take advantage of this standard workflow notification to capture sequential internal signatures of documents before or after they are signed as part of a formal approval framework process.

See the product documentation for *PeopleTools: Workflow Technology*

The second type of workflow is PeopleSoft Approval Framework. The approval framework requires the setup of an approval workflow process. The approval framework process is the framework that enables three levels of users, from technical to end users, to develop and configure approvals that meet their organizational requirements. You can use approval framework to approve new clauses in the library, and for final approval routing of the contract document that can also include signatures. Normally, this is a rubber-stamp type approval, because the collaboration feature is better used to develop the contract. For example, the process of creating a new clause in the library and approving it requires defining who should approve the clause, the order in which that person approves it, and how it is routed to approvers. When the approval process is complete, the clause is available for use in a document.

Approval framework also provides a way to dynamically define authorized approvers for an approval workflow process of the contract document. A sample approval process definition called Document is provided as an example of how you can set up the document approval to do a final content clause

approval, business approval for commodity and fiscal review, and a final owner approval. The example approval is set up for transactional purchase order contract-related documents; however, approval framework setup enables you to configure the approval for document approval definition by specifying record and field criteria to evaluate.

Collaboration is a contract process that you use with standard PeopleSoft workflow. During collaboration, you review and negotiate the terms of a clause, contract, or ad hoc document. You use the standard PeopleSoft workflow to finalize the document. After collaboration, you can use the PeopleSoft Approval Framework process to gain approval for the contract or ad hoc document.

This table provides an overview of how workflow is used in Supplier Contract Management, along with how various elements are approved:

<b>Formal Approvals (Approval Framework)</b>	<b>Collaboration (PeopleSoft Standard Workflow Notifications)</b>	<b>Signature Routings</b>	<b>User Preferences and Authorizations Related to Approvals</b>
<p>You can enable the following approvals as installation options. If enabled, and after the approval process is complete and the last person in the approval instance approves, the clause or document is marked as Approved.</p> <ul style="list-style-type: none"> <li>• Clause approvals.</li> <li>• Document approvals.</li> </ul>	<p>Use with collaboration on contract or ad hoc documents. Collaboration is optional and if is enabled, you complete it prior to any formal approval processing. You can collaborate multiple times on a document.</p> <p>The system provides an initial default list of collaborators based on the users defined in the My Collaborators/View Access component (CS_OPR_PREFERENCE). You can add ad hoc collaborators throughout the process. You can also repeat the collaboration process. When routing a document for internal collaboration, the document link is sent to all collaborators at the same time so that the first user available can edit or review the document change.</p> <p>If you are using the supplier portal to route documents for external collaboration, the document is routed for edit access only to the primary document owner defined on the external contacts for the document. Other external users can have view access to the document, but for a given collaboration round the primary external document owner must manually route and return any consolidated changes through the portal.</p>	<p>When you are using digital signatures, you can use a workflow similar to collaboration's to route the prepared document internally. Depending on the setup, you can select to capture internal signatures before, during, or after workflow approvals if they are in use.</p> <p>The signature routing for internal signatures is different from collaboration in that the prepared signature document is always routed to individual users sequentially based on the sign order that you define for the document.</p> <p>If signatures are missing on the document you can route the document again for signatures, or, as an administrator, capture the signature offline and upload a new signed document on behalf of a signer.</p> <p>You can obtain external signatures using the Send to Contacts or Dispatch features. If the supply-side portal is enabled for signatures there is an option to capture digital signatures online as part of the Send to Contacts or Dispatch features. Use the Send to Contacts feature to obtain signatures if you need them before routing for signatures internally.</p>	<p>The <b>Bypass Approval</b> check box on the User Preferences page for Supplier Contract Management is a power-user type feature that enables an administrator to bypass and expedite the workflow approval and to manually set the status of a document to Approved. This is normally an exception.</p> <p>Users who are enabled to change the status (not workflow controlled) of sections and document configurators can manually mark them as Approved.</p> <p>You use a combination of a configurable approval authority that is defined using user preferences and an <b>Approval</b> check box on the definition page for process section and template approvals.</p> <p>The definitions are approved only once by an authorized user.</p> <p>When using digital signature capability, you can also capture electronic signatures during the approval process.</p> <p>See <a href="#">Understanding Digital Signatures</a>.</p> <p>When doing so approval users listed as signers also have the capability to sign a prepared document during the time they review or approve the step. Depending on how you configure approval framework, you can select to drive the approval process based on the signature list itself, or not. But, if not, then each signer must still be listed in the internal signer list to be enabled to sign the document during that user's approval step.</p>



## PeopleSoft Approval Framework Process

The Approval Workflow Framework process is a framework that enables users to develop and configure document approvals. Using approval framework, the system takes documents that include clauses, sections, and templates through the approval process until the document is approved or stopped. The clause is the basic foundation for creating documents. During the approval process, you use Microsoft Word to review a clause or document and then use approval workflow pages to approve, deny, or push back the clause.

You can create clauses and include them in sections and document configurators. You can view the clauses, but during document generation, the system only includes the approved clauses in the document. You cannot use clauses that have not been approved as dependent or alternate clauses or use unapproved clause in rules.

Using approval framework, you can:

- Approve, deny, or push back documents.
- Approve, deny, or push back document clauses.
- Include multiple approvers and reviewers.
- Access and review the Microsoft Word document.
- Assign additional approvers and reviewers during the approval process.
- Use worklist and email notifications.
- Enter comments about the document.

For additional information about the Approval Framework, see *PeopleTools: Workflow Technology*

## Approval Framework Users

The workflow process that is used by approval framework is designed for users with different responsibilities in an organization. Participants include:

- Application administrators who normally:
  - Configure the supplier contract installation.
  - Configure approval types and clause classes.
- Contract administrators, document librarians, and managers who normally:
  - Set up user preferences for contract approvals.
  - Submit clauses for approval.
  - Add and remove approvers and reviewers.
  - Submit contracts for approval.
- Approvers who normally:

- Approve, deny, or push back clauses.
- Add comments and ad hoc approvers.
- Approve, deny, or push back clauses, contracts, or other documents.

## Setup Steps for PeopleSoft Approval Framework

Before you can send documents for review:

1. Define approvers for use with clause and document approvals.

To define approvers:

- Define roles and permission lists.

Permission lists provide security authorizations for users. Roles are intermediate objects that exist between permission lists and user profiles.

See [Understanding Supplier Contract Sample Permission Lists, Roles, and Users](#).

- Assign users to roles.

After users have assigned user IDs, you can assign the user IDs to the PeopleSoft Supplier Contract Management roles for approvals.

- Create approval types, assign approving roles to them, and define clause update authorities.

The system uses the approving role name to determine the group of users that it uses in the approval cycle for a clause or document. To access the page, select **Supplier Contracts > Supplier Contracts Setup > Clause Approval Types**

The system provides the CLASS01 clause class and the HIGHRISK, MEDRISK, and LOWRISK sample clause approval types. These approval types represent levels of risk to the organization and place an importance on the approval of the clause or document. You can use this sample data as a starting point for developing approval types and clause classes.

- Set installation options for supplier contracts to require approvals for clauses and documents.

To access the options, select **Supplier Contracts > Supplier Contracts Setup > Installation Options**. If clauses and documents do not require approvals, the system doesn't launch an approval process when you create the clause or document.

2. Define user preferences that control authorizations for document administrators. These are users who can create and submit documents.

To access the authorizations, select **Supplier Contracts > Supplier Contracts Setup > User Preferences**.

3. Define user lists for use with steps in the contract approval process.

User lists define how the system determines sources for routing clause and internal document approvals. Options include roles, structured query language definitions, queries, and application classes. System-supplied data includes sample user lists, such as SupplierContractSign1 that enable you to define the approval process for digital signatures using a document's user list.

4. Define how the system notifies approvers during the approval process.

You use the Generic Template Definition page to setup notifications for each type of notification the system needs to send to administrators and approvers.

5. Set up the transaction registry.

The approval transaction registry is the interface application developers use to register an application with PeopleSoft Approval Framework.

6. Set up the approval process definitions.

The approval process definition determines the routing of the clause or document approval. The two definitions required are Document for document approval and Clause for clause approvals. The flow includes setting up approval framework for:

- Stages.

This is a part of an approval transaction that can contain multiple paths but must be at the same record level.

- Paths.

A path is a sequence of steps. Within a stage, paths execute in parallel, with each path inheriting its header or line-level from the stage.

- Steps.

A step represents one or more approvers or reviewers. The system processes steps in a path in sequence as separate criteria for each step determines whether or not that step is processed.

- Criteria.

You can define field criteria along with monetary and application class criteria using most records and fields in the database. The system uses this criteria for paths and steps and for self approvals.

7. Authorize approvers.

This step defines approvers and their approval authorization criteria for use in an approval process.

8. Set up events and escalations.

Create a notification event and specify the conditions for which the event should check and the actions that the system should take when the notification conditions are met. You can also define rules for sending notifications, such as when a clause or document approval has gone beyond the time defined for responses.

9. Manage the approval through its life cycle.

After you set up approval framework and generate clauses or documents, the system uses the setup information to process documents. This is when approvers and reviewers perform approval tasks that apply the setup features you defined.

For additional information about approving document, see [Understanding Document Approvals](#).

## Approval Setup and Transaction Tables

Basic tables to set up PeopleSoft Supplier Contract Management include:

<b>Table</b>	<b>Description</b>
INSTALLATION_CS	Installation settings for Supplier Contracts - Collaboration email template
CS_AW_TYPE (CS_AW_TYPE_LNG)	Approval type definition.
CS_CLASS (CS_CLASS_LNG)	Clause class definition.
CS_CLASSDTL (CS_CLASSDTL_LNG)	Clause detail - map to approval types.
CS_AUTH_USER	User authorization - supplier contracts authorizations for documents, sections, and templates.
CS_AUTH_USER_DTL	User authorization detail - document author and user authorizations
CS_OPR_DEF_TBL_CS	User preferences - main user preference table for Supplier Contract Management.
CS_OPR_COLLAB	Default collaborators - list of default users to include in document collaboration .

These are some of the basic tables the system uses during the processing of approvals and collaboration. You can reference additional tables when setting up approval process definitions to define criteria for approval framework workflow:

<b>Table</b>	<b>Description</b>
CS_DOC_HDR	Document Header: Fields in the document header can be commonly accessed for approval process criteria.

<b>Table</b>	<b>Description</b>
CS_AW_DOC_CLSVW	This is a special view that is useful in the approval process definition to control clause approvals within a document.
CS_DOC_PO_KEYS	This table is useful in the approval process definition to determine if document approval is related to a purchase order contract.

## Establishing Processes for Approval Framework

### Pages Used to Establish Processes for Approval Framework

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Approval Process Definition Page</u>	EOAW_PRCs_MAIN	Define basic approval process details and approval workflow process stages.
<u>Criteria Definition Page</u>	EOAW_CRITERIA	Define alert criteria for approval workflows.
<u>Approval Path Definition Page</u>	EOAW_PATH_SEC	Set up approval workflow paths.
<u>Approval Step Definition Page</u>	EOAW_STEP_SEC	Define steps for contract approval workflows.

### Approval Process Definition Page

Use the Approval Process Definition page (EOAW\_PRCs\_MAIN) to define basic approval process details and approval workflow process stages.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Approvals > Approval Process Setup**

Use this page to define an approval definition process. The process is made up of stages and their paths and steps. The approval steps that you place on the approval path represent the approval levels that are required for an approval framework transaction.

Each PeopleSoft application has a top-level record (known as a header) with keys that uniquely identify a single transaction in an application. The application itself typically has other records, but they are children (line-level records) of the header record.

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**Note:** Approvals are processed only at the header level for PeopleSoft Supplier Contract Management. This means that there is not a line-level approval capability.

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## Related Links

"Understanding the Approval Framework Feature" (Approval Framework)

"Understanding the Approval Framework Process Flow" (Approval Framework)

## Criteria Definition Page

Use the Criteria Definition page (EOAW\_CRITERIA) to define alert criteria for approval workflows.

Navigation:

Click the **Alert Criteria** link on the Approval Process Definition page.

Use this page to define the different types of criteria that you want to apply to a workflow approval process. You can create definitions consisting of a field with a logical operator and a value or definitions consisting of an application class that takes in transaction data to process the approval.

Criteria is an entity that evaluates to true or false. Criteria programs approval framework, using transaction-specific information to change, for example, routing paths. To set the context for the criteria, the engine provides the transaction keys as bind values.

## Approval Path Definition Page

Use the Approval Path Definition page (EOAW\_PATH\_SEC) to set up approval workflow paths.

Navigation:

Click the **Path Details** link on the Approval Process Definition page.

Use this page to set up additional parameters that determine how the system processes an approval path. A path contains a sequence of steps. Within a stage, paths are processed in parallel. Path entry criteria determines whether a path is processed for a given transaction or transaction line. Depending on the implementation of Supplier Contract Management, you might, for example, want to create criteria that supports various source transactions and document types. These need to be configured in the document approval definition.

Use the escalations feature to define time elements for when an approver takes too long to approve, deny, or push back a pending request.

## Approval Step Definition Page

Use the Approval Step Definition page (EOAW\_STEP\_SEC) to define steps for contract approval workflows.

Navigation:

Click the **Details** link in the Steps grid on the Approval Process Definition page.

Use this page to define steps for the approval workflow. A step represents one or more approvers or reviewers. Steps within a path are processed in sequence. Separate criteria for each step determines whether that step is performed. Each step can also have a set of reviewers, who are notified about transactions pending approval by email, if configured, and through the worklist. But the workflow proceeds without waiting for reviewers to act.

## Setting Up Approval Types

### Page Used to Set Up Approval Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Approval Type Page</u>	CS_APPROVAL_TYPE	Define approval types.

### Understanding Approval Types

To set up approval types, use the Approval Type Setup component (CS\_APPROVAL\_TYPE).

An approval type is a part of the workflow process and controls approvers for the clause approval process and document approval process. Because approval types are associated with clause classes, you use approval types to define the types of approvals that are required for a class of clauses.

Each approval type has an associated role name. The system uses the role name to determine the group of users that it uses in the approval cycle for a clause or document. The system includes all users who have this role in their user profile in the approval process. Each approval type also has a number of configurable approval settings that determine when role users are used in an approval cycle. Check boxes control the approval settings and determine whether:

- An approval is required for a clause definition that is associated with the combination of class and approval type.
- An approval is required for clause usage in a document.

The system uses role users in the contract approval process when a clause that the contract uses is associated with the combination of class and approval type.

- An approval is required for clause changes, including deletion, in a document.

The system uses the role users in the contract approval process when a contract both uses and modifies a clause that is associated with the combination of the class and approval type.

The following examples describe clause definitions and clause usage.

For a clause definition, when the system starts the approval process and accesses the Approval Status page for a clause, it determines the correct approval role names based on the clause class and approval type that is specified on the clause. If the **Clause Definition** check box is selected for the approval type, then users who have the associated role in the **Approving Role Name** field will be notified to approve the clause definition.

When using a clause, the system starts the approval process and checks the Approval Status page for a document to be approved. It determines the correct approval role names based on the clause class and approval type that are specified on the clause. If the approval type has the **Clause Changes in Doc** check box or the **Clause Exists in Doc** check box selected, then users with the associated role in the **Approving Role Name** field will be notified to approve the clause use or changes in the document approval process.

To create and apply approval types:

1. Create the approval type and select the types of clause definition or usage approvals for each approving role name that you add to the approval type.
2. Add the approval type to the clause class definition.

This links the roles to a class. To define the clause class, select **Supplier Contracts > Supplier Contracts Setup > Classes**. Specify which approval type is to be the default for the class definition. When a clause is defined, this default approval type is displayed and entered for you.

3. Create a clause using the clause class with which the approval type is associated.

When you create the clause, the system creates the link between the approval settings from the approval type definition and the specific clause definition. The approval types are associated with classes on a separate configuration page. Each class can have multiple approval types with a default type, but you can select any of the configured approval types that are available for the class.

### **Related Links**

[Understanding PeopleSoft Supplier Contract Management Workflow](#)

[Establishing Processes for Approval Framework](#)

[Maintaining User List Definitions](#)

[Defining the Transaction Registry](#)

[Defining Generic Templates](#)

[Setting Up Event Escalations and Notifications](#)

[Defining Self-Approval Criteria](#)

## **Approval Type Page**

Use the Approval Type page (CS\_APPROVAL\_TYPE) to define approval types.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Clause Approval Types**



This example illustrates the fields and controls on the Approval Type page: Clause Definition tab.

### Approval Type

SetID **SHARE**      Approval Type **MEDRISK**

'Description'

Risk Factor

**Unless otherwise specified within the workflow approval definition for 'clause' all users for roles listed within this grid are notified collectively within a single step.**

Approval Settings    Personalize | Find | View All |    First ◀ 1 of 1 ▶ Last

Clause Definition
Clause Usage

'Approving Role Name	Clause Definition
<input style="width: 95%;" type="text" value="Supplier Contract Librarian"/>	<input checked="" type="checkbox"/> <span style="margin-left: 20px;">+</span> <span style="margin-left: 10px;">-</span>

Save
 Return to Search
 Notify
 Add
 Update/Display

The system uses the approval type that you define on this page for clause approvals. You can include users who are associated with the role name as collaborators in the approval process.

<b>Field or Control</b>	<b>Description</b>
<b>Description</b>	Enter a description for the approval type. This field is required.
<b>Risk Factor</b>	<p>Enter the level of risk that this clause brings to the organization if it is included in a contract. You can associate a risk factor with the level of responsibility of a user. For example, senior personnel might need to approve clauses with higher risks.</p> <p>Risks are represented by numeric values from zero to 100. Clauses that are associated with a high-numbered risk factor represent a high level of risk for the organization. The numbers facilitate the use of algorithms that help identify the overall risk of a contract.</p> <hr/> <p><b>Note:</b> Risk factors are not incorporated within contract workflow processing.</p>

<i>Field or Control</i>	<i>Description</i>
<b>Approving Role Name</b>	Select which roles should be notified when a clause that uses this approval type is added or changed. Each approval type has an associated role name. The system uses the role name to determine the group of users that is pulled into the clause or document approval cycle. All users with this role in their user profile will be included in the approval process.  You do not have to select a role name when you initially create the approval type; however, before you define the approval settings, you must define the name.
<b>Clause Definition</b>	Select to require that this user role is included for clause approval cycles with which this approval type is associated.

### Clause Usage

Select the Clause Usage tab.

<i>Field or Control</i>	<i>Description</i>
<b>Clause Changes in Doc</b> (clause changes in document)	Select if you want this role name as a required approver when a clause of this approval type is updated or deleted within a contract.
<b>Clause Exists in Doc</b> (clause exists in document)	Select if you want this role name as a required approver when a clause of this approval type simply exists in a document.

## Maintaining User List Definitions

### Page Used to Maintain User List Definitions

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>User List Definition Page</u>	EOAW_USER_LIST	Define user lists.

### User List Definition Page

Use the User List Definition page (EOAW\_USER\_LIST) to define user lists.

Navigation:

**Supplier Contracts > Supplier Contract Setup > Approvals > User List >Setup**

Use this page to define user sources for use with steps in the contract approval process. Supplier contracts use a user list as a means to map users to certain functional roles; thereby reducing source search time. Oracle delivers a set of default user list roles corresponding to the roles within an organization. These roles are intended primarily for use with routing controls.

See "Defining Notification Templates for Approval Framework" (Approval Framework).

## Defining the Transaction Registry

### Page Used to Define the Transaction Registry

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Register Transactions Page</u>	EOAW_TXN	Register the approval transaction.

### Register Transactions Page

Use the Register Transactions page (EOAW\_TXN) to register the approval transaction.

Navigation:

**Enterprise Components > Approvals > Transaction Registry**

The transaction definition is the metadata that describes the transaction makeup to approval framework.

See the "Register Transactions Page" (Approval Framework) topic to register a PeopleSoft application, such as Supplier Contract Management, with the PeopleSoft Approval Framework. Using the page, you can define how the system interacts with portions of the application that you have defined for approvals. The registry links the components, event handler, records, and classes that you created in the approval process for an application transaction such as a clause or document approval.

## Defining Generic Templates

### Pages Used to Define Generic Templates

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
"Generic Template Definition Page" (Approval Framework)	WL_TEMPLATE_GEN	Enter generic template definitions, which can be used to establish common formats for ad hoc notifications.

## Setting Up Event Escalations and Notifications

### Pages Used to Set Up Event Escalations and Notifications

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
"Event Type Page" (Approval Framework)	EOAW_NEM_EVENTS	Identify an event type. An event type determines the server on which a notification event runs. You can add a new type or make changes to an existing type.
"Notification and Escalations Page" (Approval Framework)	EOAW_NEM_SETUP	Specify the conditions for which the event should check and the actions that the system should take when the notification conditions are met.

See the product documentation for *PeopleTools: Process Scheduler*

### Understanding Event Escalations and Notifications

The approval framework waits for an approver's decision before attempting to route the transaction further. However, using escalations and notifications, you can control what the approval engine does if the approver waits too long before responding. Approvers have a predefined amount of time to respond, after which approval framework can either remind the approver, notify someone else, or proceed with the next approval, assuming the document was approved.

Event notifications can be configured as an organization requires them. The notifications are available to meet specific needs and normally do not require coding, and they enable the system to send emails to appropriate users when specific, predefined approval events take place, such as an approver approving, denying, or pushing back a document.

See "Defining Notification Templates for Approval Framework" (Approval Framework) .

## Defining Self-Approval Criteria

### Page Used to Define Self-Approval Criteria

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Criteria Definition Page</u>	EOAW_CRITERIA	Set up self-approval criteria.

### Criteria Definition Page

Use the Criteria Definition page (EOAW\_CRITERIA) to set up self-approval criteria.

Navigation:

**Supplier Contracts >Supplier Contracts Setup >Approvals >Approval Process Setup.** Click the **Criteria** link in the Paths grid on the Setup Process Definitions page

Use this page to define approval limitations for contract managers or owners when they can approve the documents they create. For example, if a contract manager submits a contract that is linked to a monetary amount, you can use this page to define the greatest amount the manager and self approve before additional approvals are required.

The **User Auto Approval** check box setting on the Approval Process page enables self-approval. If self-approval is enabled, the system assumes the contract manager or owner's approval can approve a clause or document. If you establish criteria that controls the manager's approval authority, and that criteria is exceeded, the system does not include the manager as an approver.

If the manager is an approver on a step in any path in the process, then all prior steps in that path are omitted. Also, if self-approvals are enabled, and the self-approval criteria is met, then the system omits that step.

See ."Criteria Definition Page" (Approval Framework)

## Defining User Preferences and Installation Options for Document Approvals

### Pages Used to Define User Preferences and Installation Options for Document Approvals

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
"User Preferences - Supplier Contract Management Page" (Application Fundamentals)	OPR_DEF_TABLE_CS	Set up user preferences for document approvals. See also <a href="#">Defining Document Approvals Using the User Preferences Page</a> , and <a href="#">Defining Section Approvals Using the Section Definition Page</a> .
<a href="#">Installation Options - Supplier Contract Management Page</a>	INSTALLATION_CS	Define installation options for document approvals. See <a href="#">Defining Document Approvals Using the Installation Options - Supplier Contract Management Page</a>

### Defining Document Approvals Using the User Preferences Page

Use the User Preferences page (OPR\_DEF\_TABLE\_CS) to set up user preferences for document approvals.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Define User Preferences**

Use this page to set up authorizations for users who can, in turn, control all or portions of the approval process of a document. Specifically, you can define user authorities for authorizations over documents by defining users as document administrators. Administrators can create, view, edit, re-create, refresh, and submit documents for approval. Additional definitions for an administrator include the capability to bypass approvals, which enables the administrator to force approvals manually without going through the PeopleSoft Approval Framework process.

You can also grant an administrator access to other administrator's documents. You can define the authorities on behalf of each user, including providing basic document administrator authorities that enables the administrator to submit and control the workflow process for each additional user.

**Related Links**

[Understanding User Preferences](#)

**Defining Document Approvals Using the Installation Options - Supplier Contract Management Page**

Use the Installation Options - Supplier Contract Management page (INSTALLATION\_CS) to define installation options for document approvals.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Installation Options**

Use this page to indicate that documents and clauses are required to go through the approval process for approval framework. When you select the **Document Approval** check box, the system controls the approval of a document so that when a document is created, you cannot manually set the approval status. If you select the **Document Reapprove After Edit** check box, the system resets the document status if you modify the document after it is approved. This process requires that a document always be submitted for approval and approved again after it has changed.

**Related Links**

[Setting Up Installation Options for PeopleSoft Supplier Contract Management](#)

**Approving Clauses**

**Pages Used to Approve Clauses**

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Installation Options - Supplier Contract Management Page</a>	INSTALLATION_CS	Set up installation options for clause approval. See <a href="#">Setting Up Clause Approval Using the Installation Options-Supplier Contract Management Page</a> .

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Clause Definition Page</a>	CS_CLAUSE_DEFN	Access clauses for approval. See <a href="#">Accessing Clauses for Approval Using the Clause Definition Page</a> , <a href="#">Approving Clauses Using the Clause Definition Page</a> , and <a href="#">Setting Effective Dates for Clauses Using Clause Definition Page</a> .
<a href="#">Clause Approval Status Page</a>	CS_CLS_APPROVAL	Preview and submit clauses for approval. See <a href="#">Previewing and Submitting Clauses for Approval Using the Clause Approval Status Page</a> and <a href="#">Updating and Submitting Clauses for Approval Using the Clause Approval Status Page</a> .

## Understanding Clause Approval

The approval of clauses is different than the approval of the document or contract itself. This is because the clause is a building block for the document, and the approval process typically involves a limited set of approvers.

For example, suppose that the contract librarian is the clause author while a person in a legal role is responsible for the legal content in the clause. In the document approval process, the system selects the approvers based on the content of the entire document, while with the clause, it might just route the approval to the librarian and the legal person for specific approval of clause changes made in the document.

When you create a clause, the system sets these default values:

- Sets the clause effective date status to Active.
- Sets the clause approval status to Initial.

When the approval status is Initial, you can still reference and use the clause in the library to establish sections or configurators; however, the system does not automatically include the clause in a generated document until the clause is in an Approved status.

You can submit clause approvals using the PeopleSoft Approval Framework or a manual method. You control which method the system applies through installation options settings. The first method is submitting the clause using workflow through approval framework.

For clause approvals, the approval process ID used must be named Clause. The clause approval process definition used by approval framework and the approval type definition associated with the clause control the clause approval process and workflow route for this method.

When you submit the clause for approval, you can still edit the clause which enables modifications during the approval process. However, after the clause is approved, any further edits to the clause content require that you submit and reapprove the effective date version of the clause.

The user-defined approval type that you specify for the clause and approval framework work together to determine if approvals are necessary and who are the approvers. For example, a Low Risk approval type

might not require clause approvals for the initial creation of the clause; whereas, a High Risk approval type requires approval by the contract librarian role.

Approval type definitions are defined separately and are first associated with a clause class. When you specify the class for the clause, you can define a default approval type. Then, you can select any approval type that is valid for the class to which the clause is linked. Oracle delivers a basic clause approval definition as part of sample data. You can use this as a starting point to configure other stages, paths, and steps.

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**Note:** Data in the sample database includes a clause approval process that adds the sample contract librarian user (CSLIB1) as an approver and adds the legal approver user (CSLEG1) as a second approver. This processing is based on the High Risk approval type for sample data class CLASS01.

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See [Establishing Processes for Approval Framework](#).

The second method of clause approval is manual approval. You control when manual approvals are used when you define installation options. If you do not select the **Clause Approval** check box on the Installation Options page, you can use the **Approval Status** field on the Clause Definition page to set the clauses to be approved manually and to enable them for use in generated documents.

At any time during clause approval process, the clause or other editors of the clause can cancel the approval process. This action cancels all worklist entries and sets the contract status back to Initial. In addition, there is a user preference option that when selected enables new clauses entered by the user to be automatically approved as they are saved.

## Clause Approval Steps

These steps describe the clause approval process using approval framework:

1. The clause author or originator adds a new clause.

The system sets the approval status to Initial and displays the Clause Definition page. The clause approval status field is disabled because approval framework manages the approval process.

2. The originator clicks the **Submit for Approval** button.

The system displays the Clause Approval Status page. The originator can add additional paths and approvers before saving and submitting the approval request. The system routes the clause approval request and updates worklist entries for the approvers as the clause goes through its approval.

The **Preview Approval** button on the Clause Definition page enables the originator to review the approvers based on approval framework clause approval process before submitting the clause for approval. You cannot change the approval process at this point.

3. Approvers access the system and use one of these methods to determine whether an approval is pending:
  - Approval worklist.
  - Email link.
  - Manual access to the clause definition.

The notification provides details about the clause.



4. Approvers access the Clause Definition page by selecting the entry for the clause within their worklist.

The system displays the page with a message that the document is pending the approver's approval. Using the page, approvers can preview the clause and, if they have the authority, edit it. The page also presents the **Approve**, **Deny**, or **Pushback** buttons.

5. Approvers click the **Approve** button.

The system displays the Clause Approval Status page with instructions for finalizing the approval and details about the current clause status before you finalize the approval. The approver can also enter comments.

6. Click the **Approve** button.

The system displays the Clause Definition page and sends notifications to the next approver in the path. You can click the **Approval Details** link to review the approval progress and comments.

7. The approval process continues until all approvers have approved the clause.

After the clause is approved, the system updates the **Approval Status** value on the Clause Definition page to *Approved*. Click the **Approval Details** link to review information about the approval. The details also indicate that the clause has been approved.

If an approver denies the clause during the approval process, the system stops the entire clause approval process. The originator or an approver can correct the issues. The originator or approver should then resubmit the clause by clicking the **Submit for Approval** button on the Clause Definition page which routes the clause again through its original clause approval routing.

An approver can push the request back to the previous approver during the approval process. The previous approver receives an email notification and can review the request again. After correcting the issues the request can be resubmitted.

---

**Note:** If the last approver in the approval process is also submitting or resubmitting the clause for an approval, approval framework system inserts an error step into the approval process. The step requires that users in an administrator role specified on the clause approval process definition that one additional user has reviewed the clause. See [Understanding PeopleSoft Supplier Contract Management Workflow](#).

---

**Note:** The clause approval process applies to only a specific clause that you submit through the approval engine. Approvals of dependent clauses and clauses are separate activities; however, the dependent clause status appears on the parent clause when you are submitting the parent clause for approval.

---

You must set up a preliminary configuration for clause approval before using it. The system associates approval rule definitions for clauses with SetIDs and maps them based on the clause SetID. A record group links the clause to the approval process SetID. The PeopleSoft system delivers a basic approval definition that is based on approval configurations comprised of class, clause, approval type, role name, and approval action in the sample database that you can reference when defining clause approval definitions stages, paths, and steps.

## Installation Options

You use installation options to define whether a clause should be required to have approvals. When you require clause approvals, you cannot manually update the **Approval Status** field on the Clause Definition

page. The field value represents the approval current state of the approval process. If clause approval is not required, you can manually update the field.

Also, approval types might define that a clause approval is not required. So, when you click the **Preview Approvals** button, the system does not display approvers, but rather indicates that approvals are not required. If you click the **Submit for Approval** button, the system sets the clause to an Approved status.

See [Setting Up Installation Options for PeopleSoft Supplier Contract Management](#).

## Clause Classes

Clause classes enable you to classify approval types for a specific purpose. For example, purchasing contracts for services may have a set of approval types. When you create a clause, you must add the class name for it. Each class definition contains a row for each approval type. You define classes using the Supplier Contracts Setup component. When defining a class, you can select the **Default** check box on the Clause Class page and then select the **Default** check box for one of the approval type rows on the same page.

The system uses these defaults during clause creation to set the initial values of the **Class Name** and **Approval Type** fields on the Clause Definition page. Specifying a default approval type for a class is important for higher risk clauses that require approval. If the class definition provides a default value, the approval type value for clauses that use that class cannot be left blank.

See [Clause Class Page](#).

## Approval Types

The clause and document approval process both use approval types. You define approval types using the Approval Type page.

To set up approvers for the clause approval process, you add an approving role to the Clause Definition tab on the Approval Type page. When you check the **Clause Definition** check box, the system adds the approvers that are members of the role that appears in the **Approving Role Name** field as parallel approvers when you define or change the clause definition.

When using approval types on a clause with an approval process definition defined as the sample process definition ID Clause, the setup on this page determines who are the first approvers for the clause. The routing is based on the roles defined on the Clause Definition tab. PeopleSoft provides a sample process definition ID called Clause.

You use the Clause Usage tab for the approving role name to define the approval requirements for this clause when it is changed or deleted in an actual document during the document approval process. Or, possibly, when the clause simply exists in a document, such as extremely high-risk clauses. The PeopleSoft system provides a sample process definition ID called Document.

The system tracks approval requirements by tracking the usage of predefined clauses in a document and tracking changes to the plain-text version of those clauses in documents as they are checked into the system. The roles defined for these approval types and that are related to those clauses determine the users to which approvals are routed as the first step in the document approval process.

---

**Note:** The approval framework provides you the framework to create workflow processing with various stages and steps. As part of this solution, the approval type setup offers a method of requiring and routing approvals to roles for clause definition and usage in documents. Use of the approval type structure delivered by the PeopleSoft system is not mandatory. You can use alternate approval process definitions or not use any.

---

## Delegating Clause Approval

You can use the Delegation Framework to delegate clause approval authority to other users, who can then take action on specific transactions on your behalf.

For more information on setting up and using Delegation Framework see:

"Understanding Delegation" (Enterprise Components)

"Configuring Delegation Transactions" (Enterprise Components)

"Working with Self-Service Delegation" (Enterprise Components)

## Related Links

[Setting Up Approval Types](#)

## Setting Up Clause Approval Using the Installation Options- Supplier Contract Management Page

Use the Installation Options- Supplier Contract Management page (INSTALLATION\_CS) to set up installation options for clause approval.

Navigation:

**Supplier Contracts >Supplier Contracts Setup >Installation Options**

Use this page to specify whether clause approvals are required. Click the **Supplier Contract Management** link. In the Supplier Contract Management page, click the **Clause Approval** check box to indicate that approval is required. This selection means the clause will go through PeopleSoft Approval Framework processing before it becomes available for use in documents. Clause approval also controls how the system displays the **Approval Status** field on the Clause Definition page. As you route the clause through the predefined approval process, the system updates the status. The default setting for the new clause is *Initial*.

If you do not select the **Clause Approval** check box on the Installation Options page, then you can set the approval status manually as long as you have the authority.

## Accessing Clauses for Approval Using the Clause Definition Page

Use the Clause Definition page (CS\_CLAUSE\_DEFN) to access clauses for approval.

Navigation:

Click the **Worklist** link on the Home page and select *Approval Routing* in the **Work List Filters** field.

Use this page to perform approval tasks for clauses. The **Approval Status** field displays the approval status and is disabled if a clause is required to go through approval framework for approval processing. The system automatically updates the field, depending on the approval progress. If installation options have been set to require clause approval, the **Preview Approvals** and **Submit for Approval** buttons also appear on this page. For more information about approving clauses using approval workflow: See [Approving Clauses Using the Clause Definition Page](#).

If the **Approval Status** field is available, then you have permission to update the approval status using this page. You can manually set the status to reflect the current state for the approval. Statuses are:

- *Approved*: Select to indicate that the clause has been approved for use. You can still modify any effective-dated row that has been approved. If you make changes, the system sets the approval status from *Approved* back to *Initial*. Then, you must select *Approved* to update the status.

Also, if you do not set clauses for approval using installation options, you can set up automatic approvals for clause librarians. You use user preferences to define the librarians who have automatic approval authority. When automatic approval is set to *Approved* in user preferences, and the librarian creates a clause, the approval default value for the clause is *Approved*. If the librarian checks out an approved clause and makes changes, the system does not set the status back to *Initial*. Rather it leaves the clause at the *Approved* status.

See [Understanding User Preferences](#).

---

**Note:** Although a clause may not be in an Approved status, you can still use it as part of a section or configurator. Its availability for use in an actual document depends on the clause's status.

---

- *Initial*: Select to indicate the status of the clause is in the initial state of creation. This is the default value when you access the Clause Definition page after you create the clause. When a clause is in this status, you can maintain elements of the clause. You can use the clause in other content structures, such as sections and configurators. Functions, such as previewing documents, display the clause with a "\*\*\*Pending Approval\*\*\*" statement at the beginning of the clause. Document generation does not include clauses that are in the Initial status.
- *Pending*: Select if the clause is in the process of being approved, but has passed the initial creation stage. The system processes clauses that are in this status similar to clauses that are in the Initial status. Document generation does not include clauses that are in the Pending status.

---

**Note:** If the clause is set up for approval framework processing and the clause is pending the approval of an approver, the Clause Definition page displays the **Approve**, **Deny**, or **Pushback** buttons for the approver to select from.

---

<b>Field or Control</b>	<b>Description</b>
<b>Preview Approvals</b>	Click to access the Clause Approval Status page, where you can preview approvers for the clause. You cannot update the approvers for the clause using the page, but you can submit the clause for approval after reviewing the approvers.
<b>Submit Approvals</b>	Click to access the Clause Approval Status page, where you can update approvers for the clause and then submit the clause for approval.

## Previewing and Submitting Clauses for Approval Using the Clause Approval Status Page

Use the Clause Approval Status page (CS\_CLS\_APPROVAL) to preview and submit clauses for approval. This feature is only available when installation options require that clauses must be approved.

Navigation:

Click the **Preview Approval** button on the Clause Definition page.

Click the **Submit for Approval** button on the Clause Definition page.

This example illustrates the fields and controls on the Clause Approval Status page (1 of 2).

**Clause Approval Status**

SetID: SHARE Content ID: SERVICES CLAUSE Effective Date: 08/24/2009  
Description: Service Clause

Review/Edit Approvers

**Clause Approval**

:Initiated + Start New Path

Approval Type Clause Approvals

- Not Routed: Brad Bell, Clause Librarian Approvers
- Not Routed: Calvin Roth, Clause Librarian Approvers
- Not Routed: Clause Librarian, Clause Librarian Approvers
- Not Routed: Clause Approver, Legal Dept for Clause Approval

This example illustrates the fields and controls on the Clause Approval Status page (2 of 2).

Not Routed: Tiffany Irving, Clause Librarian Approvers

Not Routed: Veronica Atkins, Clause Librarian Approvers

Approval Comments

Preview Approval Submit for Approval Save

[Return to Clause Definition](#)

Save Notify Add Update/Display Include History Correct History

Use the **Preview Approval** button on the Clause Definition page to review the approvers in the process. The system displays a message if clause approvals are not required. After reviewing the approval stages and paths, you can submit the clause for approval. The Clause Approval Status page is similar to the page used to view and edit the document approval status.

Click the **Return to Clause Definition** link to return to the Clause Definition page.

## Updating and Submitting Clauses for Approval Using the Clause Approval Status Page

Use the Clause Approval Status page (CS\_CLS\_APPROVAL) to preview and submit clauses for approval.

Navigation:

Click the **Submit for Approval** button on the Clause Definition page.

This feature is only available when installation options require that clauses must be approved.

When you click the **Submit for Approval** button on the Clause Definition page, you can submit a clause for approval and, if needed, update the approvers and reviewers in the clause approval process. This feature is different than previewing and submitting a clause for approval in that you can add reviewers and approvers using this page.

When you submit a clause for approval and approvals are required, the system routes the approval notifications and sets the contract approval status to Pending.

If you submit a clause that does not require approvals, the system displays this page which indicates that approvals are not needed and that approval criteria was not met. It also displays a message indicating that the clause has been approved. Then, the system sets the clause approval status to Approved and the clause status to Active.

If approvals are needed and the approval criteria has been met, the system sets the clause approval status to *Pending*, and can send email, worklist routings, or both to approvers in the first relevant steps based on approval configuration. The Clause Approval Status page displays again showing the updated approval status. If the status is not Initial, the **Preview Approval** and **Submit for Approval** buttons are not available.

Click the **Return to Clause Definition** link to return to the Clause Definition page.

---

**Note:** If bind variables are validated before the clause is submitted for approval and if the validation fails, the system does not send the clause for approval and displays the errors that exist in the variable definitions.

---

## Approving Clauses Using the Clause Definition Page

Use the Clause Definition page (CS\_CLAUSE\_DEFN) to access clauses for approval.

Navigation:

Click the **Worklist** link on the Home page and select *Approval Routing* in the **Work List Filters** field.

This example illustrates the fields and controls on the Clause Definition page (1 of 2).

**Clause Definition**

SetID: SHARE      Clause ID: CL\_TERM01

\*Description: Term of Contract

Clause Type: General Clause      Associate to Clause Group

Library: GENPUR01      General Procurement Contracts Library

\*Class Name: CLASS01      Standard Procurement Clauses

Approval Type: MEDRISK      Medium Risk Clauses

Notes:

---

**Clause Attributes Per Effective Date**

Effective Date: 01/01/2005      Status: Active      Where Used: + -

Numbered Clause       Insert Page Break Prior       Edited via Word Application

Protect in Document       Repeating Object

Approval Status: Pending Approval

Buttons: Approve, Deny, Pushback

Buttons: Validate Variables, Add Variables, Preview Document, Edit Document

This example illustrates the fields and controls on the Clause Definition page (2 of 2).

Title: Term of Agreement  
237 characters remaining

Full Text: The initial term of this Agreement will begin on %%CONTRACT\_START\_DATE%% and end on %%CONTRACT\_END\_DATE%%. At the end of the initial term, this Agreement will be evaluated. If the parties agree that it is mutually beneficial relationship, the Agreement may be extended in writing for up to 2 additional years. Time is of the essence in this Agreement.

Reference Text:

---

**Dependents**

*Sequence	Numbered	*Content ID	Description	Content Format
10	<input checked="" type="checkbox"/>			Full Text

---

**Alternates**

*Priority	*Alternate Clause	Description	Content Format	Approval Status
10	CL_TERM02	Term of Contract - with auto extend condition	Full Text	Approved

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display, Include History, Correct History

Approvers receive notifications through their email or worklist systems. The system provides a link that enables approvers to go directly to the Clause Definition page. If you are an approver of a clause and the clause is pending your approval, the Clause Definition page displays the **Approve**, **Deny**, **Pushback** buttons.

To approve a clause:

1. Click the **Approve** button.

The Clause Approval Status page displays the clause approval path and approvers. You can also click the **Deny** button to reject the clause. If you deny a clause, the entire workflow process is stopped and the clause status is set to Initial. If you click the **Pushback** button, the clause is pushed back to the previous approver. The previous approver can review the clause and resubmit it for approval.

2. Enter any comments you have concerning the clause.
3. Click the **Approve** button.

The system returns to the Clause Definition page.

4. Click the **Approval Details** link.

You can use this link anytime to review your comments and check the progress of the clause as it goes through approvers.

## Setting Effective Dates for Clauses Using Clause Definition Page

Use the Clause Definition page (CS\_CLAUSE\_DEFN) to access clauses for approval.

Navigation:

**Supplier Contracts >Manage Contract Library >Clause Definition**

Use the **Effective Date** field to select a date on which this clause will become effective. The default value is today's date; however, if you are preloading existing approved clauses, you might want to use a date earlier than today. This date determines whether the system considers to include a clause in a document, based on the start date of the document.

You use effective dating to control versions of clauses. It's a method of dating information where you can predate information to add historical data to the system. Or, you can post date information to enter it before you actually plan to approve it and place it in effect. By using effective dates, you do not delete the library content, you enter a new value with a current effective date. You can maintain a complete chronological history of data and tables, whether you changed them two years ago or want them to change them in two months.

Effective dates are key values for uniquely identifying the current or future effective-dated clause that is being submitted for approval. You can submit only one effective-dated version of a clause for approval at one time.

## Approving Clauses Using PeopleSoft Fluid User Interface

### Pages Used to Approve Clauses in the PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Pending Approvals - Supplier Contract Clause (List) Page</u>	EOAWMA_MAIN_FL	Review and approve multiple clauses that are pending approval for a specific approver.  For more information, see the "Pending Approvals Page" (Application Fundamentals)



<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Supplier Contract Clause Page</u>	EOAWMA_TXNHDTL_FL	Review and approve a single Supplier Contract Clause.  For more information, see the "Approval Header Detail Page" (Application Fundamentals).

## Pending Approvals - Supplier Contract Clause (List) Page

Use the Pending Approvals - Supplier Contract Clause (List) page (EOAWMA\_MAIN\_FL) to review and approve multiple clauses that are pending approval for a specific approver.

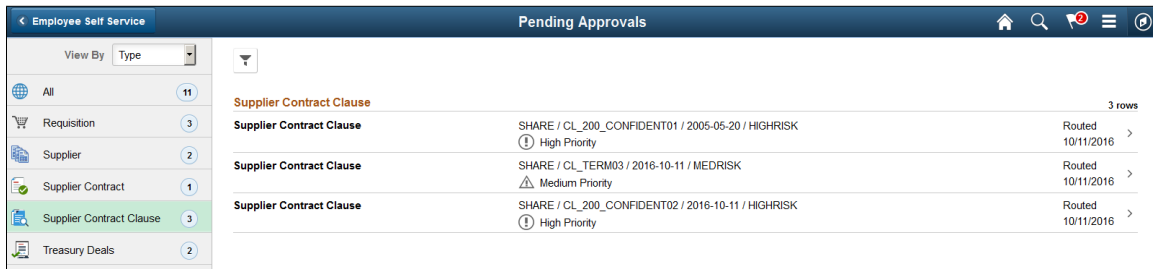
Navigation:

**Employee Self Service >Approvals .**

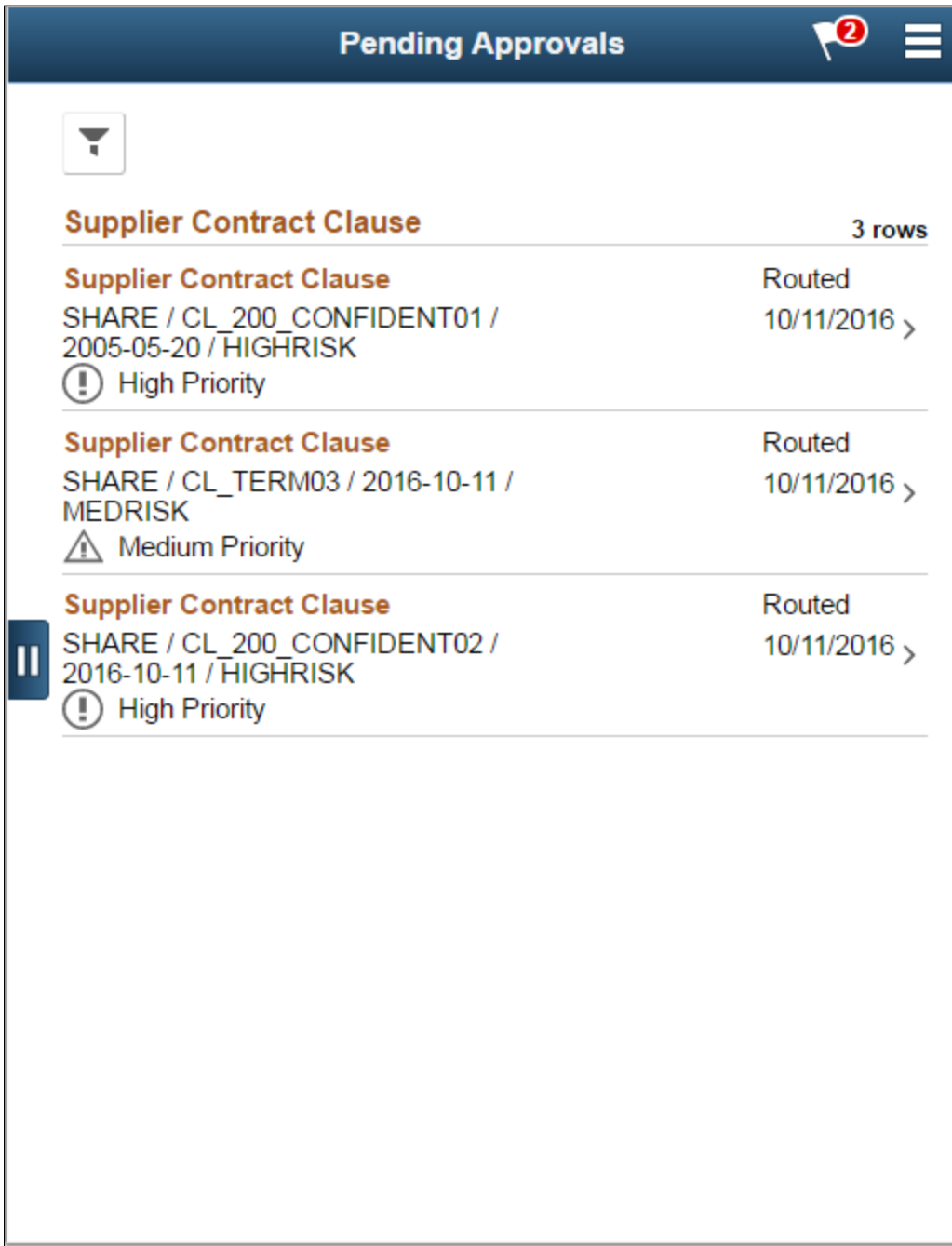
On the Pending Approvals page, select **Supplier Contract Clause** in the View By Type pane to view the Supplier Contract Clauses list in the right pane.

Smartphone: On the Pending Approvals - View By Type page, select **Supplier Contract Clause** to open a new page that lists the Supplier Contract Clauses.

This example illustrates the fields and controls on the Pending Approvals - Supplier Contract Clause (List) page.



This example illustrates the fields and controls on the Pending Approvals - Supplier Contract Clause (List) page as displayed on a smartphone.



Review header information for the Clauses currently routed for approval. To access header details for a particular clause, select the header row for that clause. You can also use the filter to narrow results on the page. For more information about using the filter, see the "Filters Page" (Application Fundamentals)

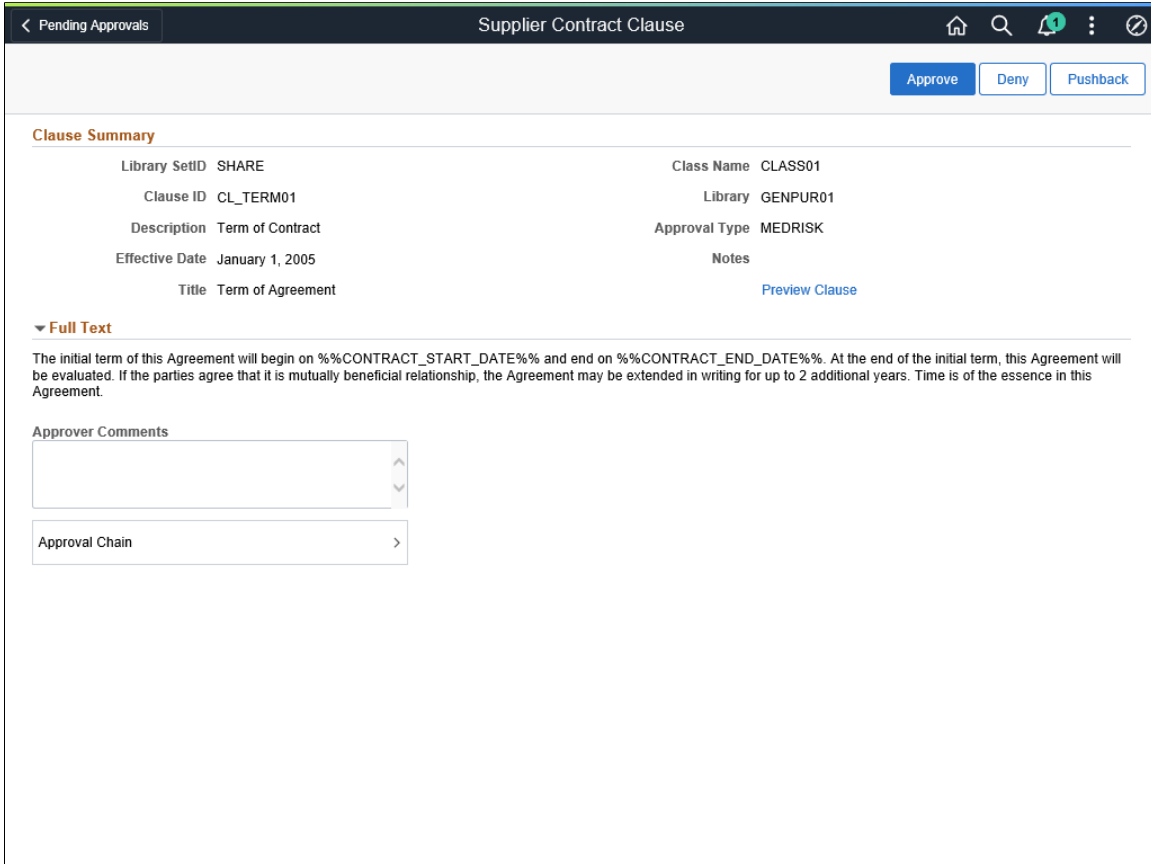
## Supplier Contract Clause Page

Use the Supplier Contract Clause page (EOAWMA\_TXNHDTL\_FL) to review and approve a single Supplier Contract Clause.

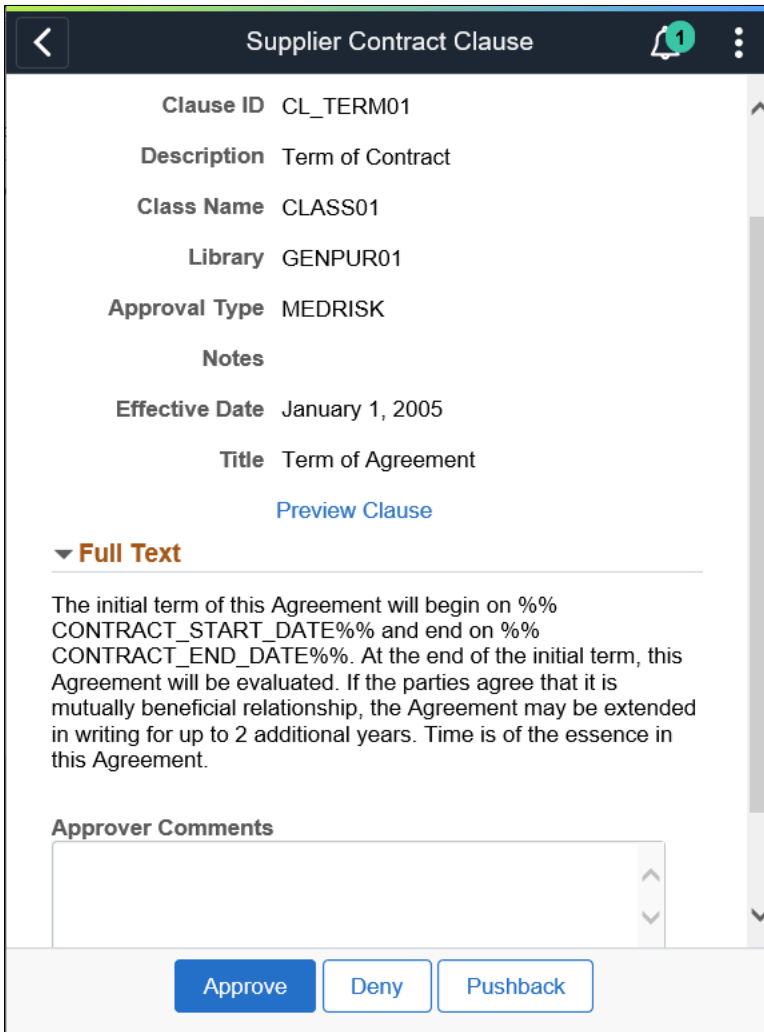
Navigation:

Select a Supplier Contract Clause in the Pending Approvals - Supplier Contract Clause (List) page.

This example illustrates the fields and controls on the Supplier Contract Clause page. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Supplier Contract Clause Approval page as displayed on a smartphone. You can find definitions for the fields and controls later on this page. When viewing a Supplier Contract Clause on a smartphone, you must scroll down to view the full text of the clause, approver comments, and approval chain.



<b>Field or Control</b>	<b>Description</b>
<b>Comment</b>	Enter comments in the text entry field.
<b>Approval Chain</b>	<p>Select to review approval chain information. You can expand or collapse approver information for each line by selecting the Expand/Collapse icon. You can also select the approver name to view approver details.</p> <p>The approval chain reflects approval status generated by the Application Workflow Engine (AWE). For more information about using AWE workflows, see "Approval Framework Overview" (Approval Framework).</p>

<i>Field or Control</i>	<i>Description</i>
<b>Approve, Deny or Pushback</b>	<p>Select an action button.</p> <p>When you select an action button, you have the option to select <b>Submit</b> to continue the action or <b>Cancel</b> to back out of the action. Upon submitting the action, the system generates a message that the action is successful.</p> <p>You can select the <b>Pushback</b> button to reroute the clause to the previous approver and provide comments as to why it is pushed back. The previous approver is notified when the clause is pushed back. Based on the comments, the approver can take necessary actions and resubmit the clause for approval. Note that, the first approver cannot see the Pushback button.</p>
<b>Preview Clause</b>	<p>Select to preview the clause document in Microsoft Word.</p> <p>For more information, see <a href="#">Document Preview and Edit Differences</a></p>

## Approving Sections and Controlling Document Configurator Availability

### Pages Used to Approve Sections and Control Document Configurator Availability

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
"User Preferences - Supplier Contract Management Page" (Application Fundamentals)	OPR_DEF_TABLE_CS	Set section and configurator user preferences. See <a href="#">Setting Section and Configurator Preferences Using the User Preferences Page</a> .
<a href="#">Section Definition Page</a>	CS_SECTION_DEFN	Define section approvals. See <a href="#">Defining Section Approvals Using the Section Definition Page</a> .
<a href="#">Document Configurator Definition Page</a>	CS_TMPL_TBL	Control document configurator availability. See <a href="#">Controlling Document Configurator Availability Using the Document Configurator Definition Page</a> .

## Understanding Section and Configurator Approvals

Initially, the system controls the authority to create and modify sections and document configurators through standard page access. If you can access the page, you can create and modify the section or

configurator. The system controls who can access pages through Supplier Contract Management application user preferences.

An approval status is available on the Section Definition page, and if you have the authority to use the page, you can create and modify a section. However, only users with section approval authority can mark the section as approved. You do not have to approve a section before you can use it in another section, or reference in a document configurator; however, you must approve the section before using it or any of its structures, such as clauses or subsections, in a generated document.

If you make section changes that require structural changes, such as a recent clause, you must add a new effective-dated row because the system uses the effective date of the section's row to determine what is valid for prompting in the structure grid. For example, if a section you are maintaining is dated 1/1/06, it does not recognize a new clause that is in effect as of 1/15/06 because the clause did not exist on 1/1/06. In addition, the system continues to use the previously approved, effective-dated row for a section until the current row is approved. When the new effective-dated row is approved, it becomes active in the system.

Configurators use an availability status to control their use in creating documents. An availability status is available for providing approval authority on the User Preference page. Only users with change configurator status authority for their user preference can approve a configurator.

## Setting Section and Configurator Preferences Using the User Preferences Page

Use the User Preferences page (OPR\_DEF\_TABLE\_CS) to set section and configurator user preferences.

Navigation:

**Supplier Contracts > Supplier Contracts Setup > Define User Preferences > Supplier Contract Management**

Use the Document Authorizations section to indicate if the document manager has the security authority to update section approval statuses and to make document configurators available for use.

<i>Field or Control</i>	<i>Description</i>
<b>Approve Sections</b>	Select to give the authority for the manager to approve document sections.
<b>Change Configurator Status</b>	Select to give the authority for the manager to change the availability of a document configurator.

### Related Links

[Understanding User Preferences](#)

## Defining Section Approvals Using the Section Definition Page

Use the Section Definition page (CS\_SECTION\_DEFN) to define section approvals.

Navigation:

## Supplier Contracts >Manage Contract Library >Section Definition

Use the **Approval Status** field on this page to indicate the status of the section approval. The system uses this setting in addition to the **Status** field which defines if the section is available for use.

The approval process determines if the section meets the organizational needs of those groups or suppliers using it. Unlike clauses and documents, sections do not use approval framework for approval processes. You can set the approval status as long as you have the authority defined in user preferences. The system has to validate the setting before it changes the section to the Approved status. Statuses are:

*Approved:* Select to make the section available for use in document structures. If you make changes to a section and click **Save**, the system automatically sets the status back to Initial and you have to manually select *Approved*. Also, you can set up section automatic approvals for librarians. You use user preferences to define the librarians who have section automatic approval authority. When automatic approval is set to *Approved* in user preferences, and the librarian creates a section, the approval default value for the section is *Approved*. If the librarian checks out an approved section and makes changes, the system does not set the status back to *Initial*. Rather it leaves the section at *Approved*.

See [Understanding User Preferences](#).

<b>Field or Control</b>	<b>Description</b>
<b>Approval Status</b>	Select an option: <ul style="list-style-type: none"> <li>• <i>Initial:</i> Select to indicate the section is not ready for use. This is the default setting when you create or make changes to the section.</li> <li>• <i>Pending:</i> Select to indicate the section is not available for use. Use this setting for example if others are reviewing the section.</li> </ul>

## Controlling Document Configurator Availability Using the Document Configurator Definition Page

Use the Document Configurator Definition page (CS\_TMPL\_TBL) to control document configurator availability.

Navigation:

### Supplier Contracts >Manage Contract Library >Document Configurators

Use this page to set the availability of a document configurator. The status is controlled by the **Availability Status** field.

When you select the user preferences **Change Configurator Status** check box, the document manager has the authority to determine the current status of the configurator and update its status. This is a method for developing and then placing the configurator in use.

The configurator has three statuses:

- *Available:* Select to make the document configurator available for use. If the configurator is not available, you cannot use it as a template for creating documents.

- *In Progress*: Select to remove the configurator from general use in creating documents. You might want to do this if you are redefining the configurator values. This is the default value when you create the configurator.
- *Obsolete*: Select to indicate this configurator should not be used in the creation of document templates.

## Approving Documents

### Pages Used to Approve Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Document Management Page</u>	CS_DOC_MAINT	Access document approval and review components. See <a href="#">Accessing Document Approval and Review Components Using the Document Management Page</a> .
<u>Document Approval Status Page</u>	CS_DOC_APPROVAL	For additional uses, see <a href="#">Submitting Documents for Approval Using the Document Approval Status Page</a> , <a href="#">Approving and Reviewing Documents Using the Document Management Page</a> , <a href="#">Verifying Document Approvals Using the Document Approval Status Page</a> , <a href="#">Denying Approval for Documents Using the Document Approval Status Page</a> , <a href="#">Inserting Ad Hoc Approvers and Reviewers Using the Document Approval Status Page</a> , and <a href="#">Bypassing Document Approvals Using the Document Management page</a>

### Understanding Document Approvals

Document approvals are formalized processes that you use to track the development of a whole document. Using document approvals, you can route documents for approval, monitor the approval process from person to person, log who approved, denied, or pushed back the document, and review suggestions that they made about the document. The process facilitates a more detailed control of a document and helps ensure that the contract is within standards of individuals and groups in an organization.

Supplier Contract Management provides a sample approval process definition as a starting template process for the document and the clause approval workflow processing. Application administrators can define approval framework configurations to support an organization's internal processes. See [Understanding PeopleSoft Supplier Contract Management Workflow](#).

Document approvals use approval framework. For document approvals, the approval process ID that you use must be named Document. The approval framework supports multiple approvers who can be notified at the same time, creating parallel approval paths. Approvers can approve, deny, or push back transactions and assign ad hoc reviewers or approvers for the transaction. When the approval process is complete,



the system updates the document as approved, rejected, or pushed back. Supplier Contract Management also incorporates an optional clause-level approval stage so that the system can automatically include appropriate individuals in an approval process based on the presence or modification of specific contract clauses. See [Understanding Clause Approval](#).

During the approval process, approvers can add other approvers or reviewers to the current or a later stage of the approval process. For example, if an author wants input from an inventory analyst, she can add the analyst as an approver. This is called ad hoc approval. It applies only to the approval instance in which the addition occurs and does not affect the overall approval flow. Only the approver who adds an ad hoc approval can delete it.

An author can also be a document approver. Authors approving their own documents is called self-approval. A check box setting on the Approval Process Definition page enables self-approval. If self-approval is enabled, the author's approval is assumed and the process continues; however, you can establish criteria that help control the author's approval authority. For example, you can place a limit on the monetary amount for which the author writes a document so that if the transaction is over that amount, the author cannot be an approver.

An administrator can manage approvals by reassigning those that do not have alternates defined for their approval. You can enter criteria to limit the number of approvals that the system displays.

The approval processing of documents can also include enabling internal users to digitally sign documents at the same time they approve the document if the installation and document type settings dictates signatures are to be captured for this document during approvals. You can configure the system to capture internal signatures before, during, or after approvals.

See the Life Cycle Options section of the [Document Type Page](#) and [Sending Documents to Internal and External Contacts](#).

---

**Note:** External users can also digitally sign contract documents. See [Signing External Documents](#).

---

## Document Approval Steps

At any time during document approval process, the contract owner or an authorized alternate can cancel the approval process. This action cancels all worklist entries and sets the contract status back to *Draft*.

These steps describe the document approval process:

1. The document owner or originator adds a new purchasing contract or ad hoc document.

The system sets the initial approval status to Draft and displays the Document Management page.

2. The originator clicks the **Submit for Approval** button.

The system routes the document and updates worklist entries for the approvers and reviewers. The originator can preview the approvers prior to submitting for approval and add additional approvers or reviews based on their knowledge of the document.

3. Approvers access the system and use one of these methods, depending on the approval process configuration, to determine whether an approval is pending:

- Approval worklist.
- Email.

The notification provides details about the document.

4. Approvers access the Document Management page.

The system displays the page with a message that the document is pending the approver's approval. Using the page, approvers can preview the document and, if they have the authority, edit it. History for edits made to the document are maintained and available using the Document Management page. The page also presents the **Approve**, **Deny**, and **Pushback** buttons.

5. Approvers click the **Approve** button.

The system displays the Document Approval Status page with instructions for finalizing the approval and details about the current document status before you finalize the approval.

6. Click the **Approve** button.

The system updates the approval status for the current approver, resets the overall document approval status to Pending Approval, and sends the notifications to the next approver in the path. Upon approval by the last person in the path that might be the originator depending on how you configure approval framework, the document status is set to Approved.

7. The originator accesses the Document Management page and clicks the **Approval Details** link to review information about the approval.

---

**Note:** If an approver clicks the **Deny** button, the system stops sending approver notifications, marks the approver step as denied, and, depending on the configuration, notifies the originator about the approval denial. The originator can either cancel the approval process or make changes to the document and submit it again for approval. When you resubmit an approval, the entire approval route starts from the beginning.

---

## Delegating Document Approval

You can use the Delegation Framework to delegate document approval authority to other users, who can then take action on specific transactions on your behalf.

For more information, on setting up and using Delegation Framework see:

"Understanding Delegation" (Enterprise Components)

"Configuring Delegation Transactions" (Enterprise Components)

"Working with Self-Service Delegation" (Enterprise Components)

## Accessing Document Approval and Review Components Using the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to access document approval and review components.

Navigation:

- **Supplier Contracts > Create Contracts and Documents > Contract Entry**

Click the **Maintain Document** button on the Contract page.

• **Supplier Contracts > Create Contracts and Documents > Document Management**

This example illustrates the fields and controls on the Document Management page.

Document Management		<a href="#">Return to Document Search</a>	
SetID:	SHARE	Contract ID:	<a href="#">00000000000000000000000045</a>
Vendor:	CAMPER'S WAREHOUSE		
Document Type:	Standard Contract Document		
Description:	Fishing Corp. Contract		
Administrator:	Kenneth Schumacher		
Sponsor:	Department:		
Amendment:	1	Created On:	08/20/09 11:24AM <a href="#">Document Details</a>
Version:	1.00	Amended On:	08/20/09 11:26AM
Status:	Draft	Last Modified On:	08/20/09 11:26AM
View and Edit Options:		Review and Approval:	Other Document Actions:
<a href="#">View Amended Document</a>		<a href="#">Route Internally</a>	<a href="#">Send to Contacts</a>
<a href="#">View Amendment File</a>		<a href="#">Route Externally</a>	<a href="#">Refresh Document</a>
<a href="#">Edit Amended Document</a>		<a href="#">Preview Approval</a>	<a href="#">Recreate Document</a>
<a href="#">Edit Amendment File</a>		<a href="#">Submit for Approval</a>	<a href="#">Compare Documents</a>
<a href="#">Add Attachments/Related Documents</a>		<a href="#">Bypass Approvals</a>	<a href="#">Prepare Document for Signing</a>
<a href="#">Document Modification Summary</a>		<a href="#">Internal Contacts/Signers</a>	<a href="#">Create Executive Summary</a>
<a href="#">Document Version History</a>		<a href="#">External Contacts/Signers</a>	<a href="#">Deactivate Document</a>
		<a href="#">Document View Access</a>	<a href="#">Generation Log</a>

Use this page to access document collaboration, review, and approval tasks. To perform a task, click the corresponding button or link.

Approval management is the process of taking a clause or document through the organization until it is approved or canceled. Approvers and reviewers use the process to finalize documents.

## Document Approval Status Page

Use the Document Approval Status page (CS\_DOC\_APPROVAL) to preview approvals.

Navigation:

Click the **Preview Approvals** button on the Document Management page.

This example illustrates the fields and controls on the Document Approval Status page (1 of 2).

### Document Approval Status

SetID: SHARE Contract ID: 00000000000000000000000040  
 Vendor: Axis Systems

Review/Edit Approvers

#### Business Approvers

< :Initiated + Start New Path

Contract Amount

Not Routed

+

Kenneth Schumacher

Supervisor by UserID

-

#### Digital Signatures

< :Initiated + Start New Path

Digital Signatures

Not Routed

+

Tiffany Irving

First Digital Signature

-

This example illustrates the fields and controls on the Document Approval Status page.

### Owner Review

< :Initiated + Start New Path

Final Review by Owner

Not Routed

+

Calvin Roth

Contract Owner

-

Approval Comments

Preview Approval
Submit for Approval

[Return to Document Management](#)

Use this page to preview approvals and submit approvals. This page is similar for previewing and submitting documents, except when previewing the approvers, you cannot make changes to the approvers or add approval paths. The headings and statuses can change depending on the type of approval, path, and stage.

### Review/Edit Approvers

Use this section of the Document Approval Status page to review aspects of the approval flow, such as who approved the document or clause prior to submitting the document for approval. The grid displays

all approval steps for the paths that are defined in the approval stage. Each stage is identified by a heading within the grid. The first stage must be approved before the next stage begins the approval process.

When a stage begins the approval process, the system updates the approval status in the heading and sets the next stage or stages to the **Awaiting Further Approvals** status.

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Preview Approval</b>	Select to view a list of approvers based on the approval process definition.
<b>Submit for Approval</b>	<p>Select to immediately start the approval process. After starting the approval process, the system displays another Document Approval Status page with the new approval status. Using the page you can:</p> <ul style="list-style-type: none"> <li>• Review approvers and reviewers.</li> <li>• Review approval process stages and paths.</li> <li>• Make comments about the document before continuing the approval process.</li> <li>• Add approvers and reviewers.</li> <li>• Start new approval paths.</li> <li>• Cancel the approval process.</li> </ul>

See [Submitting Documents for Approval Using the Document Approval Status Page](#).

## Approval Comments

Enter comments concerning the document's approval. When you click the **Submit for Approval** button, the system places your comments in the Approval Comment History section. During the process, the system removes the comment from this section so that other comments can be entered.

Comments can be added by any approver or reviewer, and the system makes them visible to all users in the approval cycle.

## Submitting Documents for Approval Using the Document Approval Status Page

Use the Document Approval Status page (CS\_DOC\_APPROVAL) to submit documents for approval.

Navigation:

Click the **Submit for Approval** button on the Document Management page.

When you click the **Submit for Approval** button on the Document Management page or when you select the **Submit for Approval** button while previewing an approval, the system immediately starts the approval process and displays this page.

When approvals are required, the page displays the approvers, and the system sets the contract status to Pending Approval and sends email and worklist routings to approvers in the first relevant steps based on the approval process configuration.

You can add new paths and ad hoc approvers and reviewers to the initial approvers. In addition, you can enter approval comments. After making the changes, click the **Save** button to add the comments to approval details and send notifications to the added approvers and reviewers. The system updates the document status Pending Approval. You can review approval details by clicking the **Approval Details** link on the Document Management page.

Click the **Cancel Approval Process** button to stop the document approval at any point during the approval process.

When you submit a document for approval, and approvals are not required, the Document Approval Status page displays a message that approvals are not required. If you click the **Submit for Approval** button, the system sets the contract status to Approved.

### Review/Edit Approvers

Use this section of the Document Approval Status page to review aspects of the approval flow, such as who approved the document or clause prior to submitting the document for approval, and to add ad hoc approvers and reviewers. The section displays all approval steps for the paths that are defined in the approval stage. The system identifies each stage with a heading in the grid. You must approve the first stage before the next stage begins the approval process.

When a stage begins the approval process, the system updates the approval status in the heading and sets the next stage or stages to the **Awaiting Further Approvals** status.

The initial approval process displays based on the document approval process definition configured in the PeopleSoft Approval Framework system. The **Insert Approver** check box (green box with a plus sign) provides a page that enables you to add approvers and reviewers to existing approval paths, and the **Start New Path** link enables you to add paths to the approval process.

<i>Field or Control</i>	<i>Description</i>
<b>Start New Path</b>	<p>Click to insert a new approval path. The system displays the Start new approval path page where you can select the first user to approve or review the document for the new path. A path is a sequence of steps. Within a stage, paths are processed in parallel, with each path inheriting its header from the stage. You can add paths, for example, when you want another reviewer or approver who may have expertise in a certain field to approve or review the document.</p> <hr/> <p><b>Note:</b> This function might not be authorized for all users. The authorization is based on the specific process definition and permission list assigned to the user group.</p> <hr/>

<i>Field or Control</i>	<i>Description</i>
<b>Multiple Approvers</b>	Select to view a list of approvers when more than one person has been defined as an approver. The page displays user names and descriptions.
<b>Cancel Approval Process</b>	<p>Select to stop the approval process. This feature provides you an opportunity to:</p> <ul style="list-style-type: none"> <li>• Review approvers and reviewers.</li> <li>• Review approval process stages and paths.</li> <li>• Make comments about the document before continuing the approval process.</li> </ul> <p>After stopping the process, the system leaves the comments section available for you to enter comments about why you stopped the process. The document status remains in the Pending Approval status. You can also select to resubmit the document for approval or return to the Document Management page.</p>
<b>Save</b>	Select to save entered comments and to initiate notification of any additional approvers or reviewers that are added.

## Approval Comments

Enter comments concerning the document approval. When you click the **Save** button, the system places your comments in the Approval Comment History section. Comments are useful when the approver does not have administrator rights to edit the document or as a matter of practice, you do not want the user to modify the document as part of the approval process. During the process, the system appends new comments from approvers as the document is routed. By adding comments during the process, the document owner can reconcile, update, and resubmit the document as required.

Any approver can add comments, and the system makes them visible to all users in the approval cycle.

## Approving and Reviewing Documents Using the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to approve and review documents.

Navigation:

Click the **Worklist** link on the Document Management page. Click the document link on the Worklist page.

This example illustrates the fields and controls on the Document Management page for approving documents.

**Document Management**

Business Unit US001	PO ID 000000399	<a href="#">Return to Document Search</a>
Supplier Westbay Area Electric-		
Contract Style PO Document		
Document Type Purchase Order Document		
Description 000000399		
Administrator Kenneth Schumacher		
Sponsor	Department	

---

Version 0.00	Created On 12/19/19 11:22AM	<a href="#">Document Details</a>
Status Pending Approval	Last Modified On 12/19/19 11:23AM	

---

This document requires your approval. Review the document as directed, then select Approve or Deny.

---

<b>View and Edit Options:</b>	<b>Review and Approval:</b>	<b>Other Document Actions:</b>
<input type="button" value="View Document"/>		
<a href="#">Add Attachments/Related Documents</a>		
<a href="#">Document Version History</a>		

Approvers and reviewers use this page to review, edit, approve, deny, and push back approval for documents. When you access the page, the system can display a list of clauses that might need special approval, depending on the clause-usage settings for approval types related to each clause in the document. The system generates this list based on the approval framework document approval process definition and the definition of the approval type. For example, if the approval type related to the clause included in the contract specifies that an approval is needed if the clause is included in a document, then the users related to the role associated with the approval type will see this and any other such clause in the **Clause Pending Your Approval** grid.

The approval type definition can add approvers to the document approval process based on changes to the clauses in the document or based on including the clause in the document. If the system uses the clause approver stage, then each related user that the system notifies for approval can use the **Clauses Pending Your Approval** grid to preview a summary of clauses for their approval. Reviewing the clauses first assists in locating content in the document that needs your approval.

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Outline Number</b>	Displays the position of the clause within the document so you can more easily locate the clause in the Microsoft Word document, in addition to searching on the clause title. The field is populated when the information is available.
<b>Clause ID</b>	Displays the clause identifier.
<b>Title</b>	Displays the title assigned to the clause.

Function buttons on the Document Management page are:



<b>Field or Control</b>	<b>Description</b>
<b>Approve</b>	Click to indicate that you approve the document. When you approve a document, the system displays the Document Approval Status page, where you can confirm that you approve the document.
<b>Deny</b>	Click to indicate that you deny approval of the document. When you deny approval for a document, the system displays the Document Approval Status page, where you can confirm that you deny the approval of the document.
<b>Pushback</b>	Click to push back the document to the previous approver. You can provide comments as to why the document has been pushed back. The previous approver is notified when the document pushed back. Based on the comments, the approver can take necessary actions and resubmit the document for approval. Note that, the first approver cannot see the Pushback button.

The **View and Edit Options**, **Review and Approval**, and the Other Document Actions functions change depending on the authorizations for each user accessing the Document Management page. For example, an approver, such as a librarian, might not have the authorization to edit the document, so the **Edit Document** button does not appear and the librarian can only enter comments as part of an approval or denial.

When you click the **Edit** button, the system hides the **Approve**, **Deny**, and **Pushback** buttons to protect against other users editing the document.

If you make changes to a document, the system validates the changes and displays messages when you check in the document. In some cases, the document administrator might have to re-create or refresh the document to resolve binds.

The system displays the **View Document** button for all approvers to provide access to the document. The document is downloaded to Microsoft Word.

The Document Management page also provides you with functions to view the document version history, approval details, document modification summary log, and generation log.

## Verifying Document Approvals Using the Document Approval Status Page

Use the Document Approval Status page (CS\_DOC\_APPROVAL) to verify document approvals.

Navigation:

Click the **Submit for Approval** link on the Document Management page.

This example illustrates the fields and controls on the Document Approval Status page (2 of 2).

**Owner Review**

← :Awaiting Further Approvals [+ Start New Path](#)

Final Review by Owner

**Not Routed**

Calvin Roth  
Contract Owner

Approval Alerts

Comment ⓘ ·Sample alert message.....this is an important Document!!!!!!!!!!!!!!

Text

Approval Comments

Approve Cancel

Cancel Approval Process

Save

[Return to Document Management](#)

This page appears when you click the **Approve**, **Deny**, or **Pushback** button. The system labels the Approval Confirmation section based on which button you select. Approvers and reviewers use this page in a similar manner, except that reviewers cannot add ad hoc approvers or reviewers, edit a document, or approve, deny, or push back a document. Reviewers can preview the document and make comments using the approval process.

The Approval Comment History section provides access to comments and time and date stamp information from previous approvers in the approval process.

To approve a document:

1. Click the **Approve** button.

If an approver is the last approver, the system calls the approval event handler for the OnHeaderApprove class. This action updates the clause status to Approved. If other approvers remain, the system sends email and worklist routings for the next approvers based on the approval configuration.

2. Use the Review/Edit Approvers section to add any comments about the approval.
3. Click *Approve* to complete the approval.

## Denying Approval for Documents Using the Document Approval Status Page

Use the Document Approval Status page (CS\_DOC\_APPROVAL) to deny approval for documents.

Navigation:

Click the **Worklist** link on the Document Management page. Click the document link on the Worklist page.

This example illustrates the fields and controls on the Document Approval Status page.

The screenshot displays the 'Document Approval Status' page. At the top, it shows 'SetID: SHARE' and 'Contract ID: 0000000000000000000000057'. Below this, 'Vendor: BIKE SHOP' is listed. A section titled 'Review/Edit Approvers' is expanded to show 'Owner Review'. A red box highlights a 'Denied' status with a red 'X' icon. The details for this denial are: 'Final Review by Owner', 'Denied', 'Kenneth Schumacher', 'Contract Owner', and '08/25/09 - 05:45 AM'. Below the denial, there is an 'Approval Alerts' section with a comment: '-Sample alert message.....this is an important Document!!!!!!!!!!!!!!'. An 'Approval Comments' section contains a text input field. At the bottom, there are buttons for 'Cancel Approval Process' and 'Save', and a link for 'Return to Document Management'.

This page illustrates how a denied approval appears. As an approver, you can deny the approval of a document. When an approver denies a document, the system terminates the remaining lines in a path and terminates other stages. The originator of the document can resubmit the document after resolving issues that caused the denial.

To deny the approval of a document:

1. Enter comments in the Approver Comments section.

This action is not required before you deny the document, but it can provide details about why you denied the approval of the document.

2. Click the **Deny** button.

The approval process ends and the system:

- Changes the document status to *Denied*.

The event handler calls the `OnHeaderDeny` class, which resets the status to *Denied*. You can resubmit the document for approval and the process starts again. The system does not include ad hoc approvers who were added during the initial approval process because the approval process definition might have changed.

- Inserts a process detail history row that indicates that the document was denied.

- Sends notifications that have been configured for this event.

3. The document owner uses the Review/Edit Approvers section to review comments for the denial.

## Inserting Ad Hoc Approvers and Reviewers Using the Document Approval Status Page

Use the Document Approval Status page (CS\_DOC\_APPROVAL) to submit documents for approval.

Navigation:

Click the **Submit for Approval** button on the Document Management page.

This example illustrates the fields and controls on the Document Approval Status page with inserted approvers. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Document Approval Status' page. At the top, it shows 'SetID: SHARE' and 'Contract ID: 000000000000000000000000000023', along with 'Vendor: CAMPER'S WAREHOUSE'. Below this is a 'Review/Edit Approvers' section. Underneath, there are two main sections: 'Clause Approvers' and 'Business Approvers'. The 'Clause Approvers' section is for 'Clause ID: CL\_INSPECTION - Inspections and Tests: Initiated' and shows a 'Not Routed' status with 'Multiple Approvers' and 'Clause Approval Type Roles'. The 'Business Approvers' section is for 'Contract Amount' and shows a sequence of three 'Not Routed' approvers: 'Brad Bell' (Inserted Approver), 'Susan Young' (Inserted Approver), and 'Kenneth Schumacher' (Supervisor by UserID). Each approver box has a plus (+) symbol on the left and a minus (-) symbol on the right, indicating they can be added or removed from the sequence.

To add ad hoc approvers and reviewers, click the plus (+) symbol for a pending approval. Another page appears for you to select the user ID and whether the person is an ad hoc approver or reviewer for this path of the document.

The symbol appears on both sides of the approver or reviewer, enabling you to place the additional approver or reviewer before or after an existing approver or reviewer. When you add an approver, the system inserts the name and indicates that the user was inserted into the approval process.

You cannot change ad hoc approvers or reviewers; however, you can delete and add them again to update whether they are approvers or reviewers. To delete an approver or reviewer, click the minus (-) symbol. You can remove only approvers or reviewers that you add. A confirmation message appears when you make the selection.

---

**Note:** Inserting ad hoc approvers or reviewers is only possible at the start of the approval process, after the originator selects the **Submit for Approval** button. This function is not authorized for approvers and reviewers during the approval process.

---

## Bypassing Document Approvals Using the Document Management page

Use the Document Management page (CS\_DOC\_APPROVAL) to bypass document approvals.

Navigation:

Click the **Bypass Approvals** link on the Document Management page.

When you click the **Bypass Approvals** button, the system automatically changes the document status to Approved. You can authorize this function for document administrators using the User Preferences page.

---

## Approving Documents Using PeopleSoft Fluid User Interface

### Pages Used to Approve Documents in the PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Pending Approvals - Supplier Contract Page (List)</u>	EOAWMA_MAIN_FL	Review and approve Documents that are pending approval for a specific approver.  For more information, see the "Pending Approvals Page" (Application Fundamentals)
<u>Supplier Contract Approval Page</u>	EOAWMA_TXNHDTL_FL	Review and approve a Document.  For more information, see the "Approval Header Detail Page" (Application Fundamentals).
<u>Approval Line Detail Page</u>	EOAWMA_TXNLDTL_FL	Review display-only Clause summary.  For more information, see the "Approval Line Detail Page" (Application Fundamentals)

### Pending Approvals - Supplier Contract Page (List)

Use the Pending Approvals - Supplier Contract list page (EOAWMA\_MAIN\_FL) to review and approve Documents that are pending approval for a specific approver.

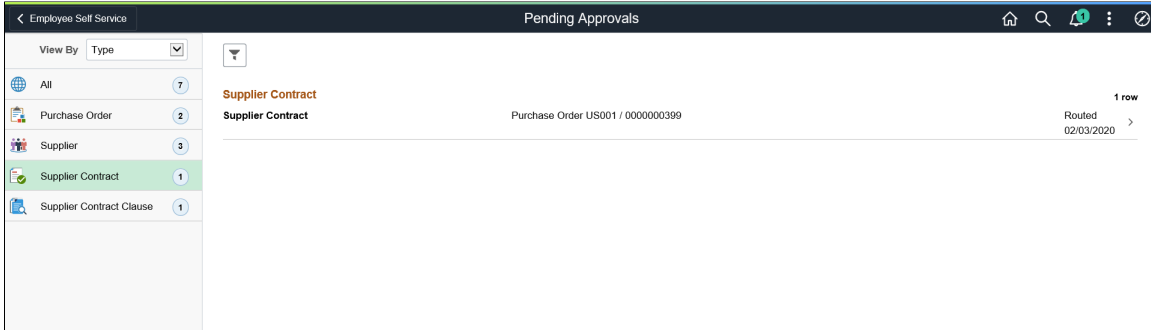
Navigation:

**Employee Self Service >Approvals .**

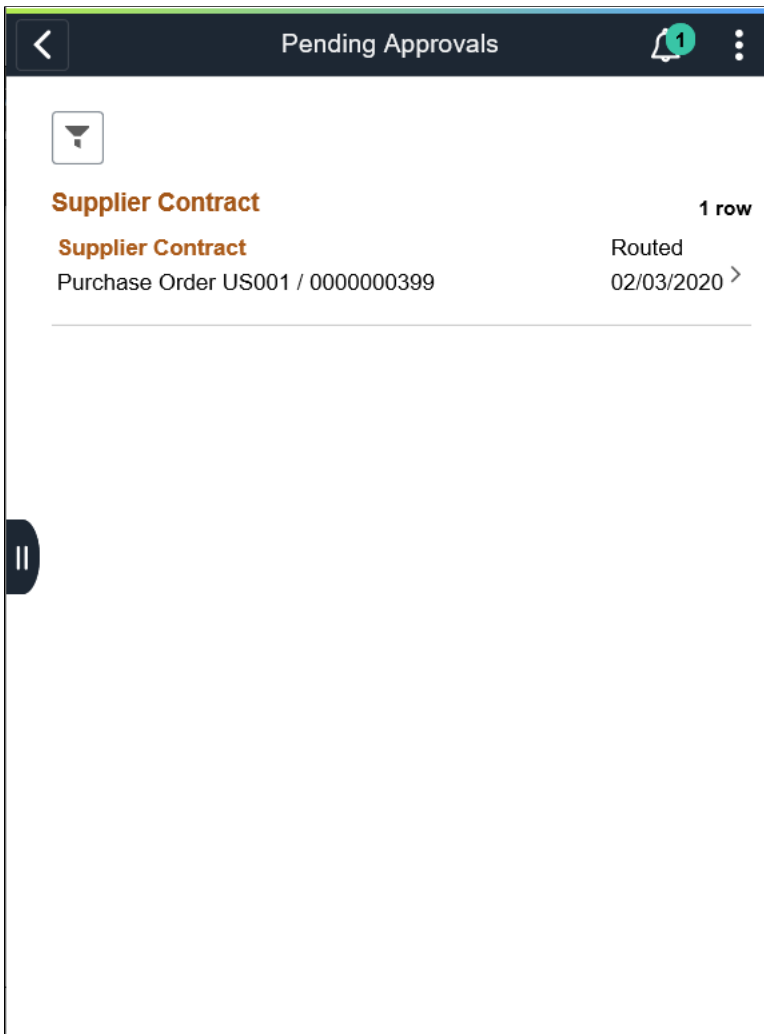
On the Pending Approvals page, select **Supplier Contract** in the View By Type pane to view the Documents in the right pane.

Smartphone: On the Pending Approvals - View By Type page, select **Supplier Contract** to open a new page that lists the Documents.


This example illustrates the fields and controls on the Pending Approvals - Supplier Contract list page.



This example illustrates the fields and controls on the Pending Approvals - Supplier Contract list page as displayed on a smartphone.



Review header information for the Documents currently routed for approval. To access header details for a particular Document, select the header row for that Document. You can also use the filter to narrow results on the page. For more information about using the filter, see the "Filters Page" (Application Fundamentals)

<b>Field or Control</b>	<b>Description</b>
	Select this button to expand or collapse the View By Type page.

## Supplier Contract Approval Page

Use the Supplier Contract Approval page (EOAWMA\_TXNHDTL\_FL) to review and approve a Document.

Navigation:

Select an Document in the list on the Pending Approvals - Supplier Contract list page.

This example illustrates the fields and controls on the Supplier Contract Approval Page. You can find definitions for the fields and controls later on this page.

The screenshot shows a mobile application interface for a 'Supplier Contract' approval. At the top, there is a navigation bar with a back arrow, 'Pending Approvals', and the title 'Supplier Contract'. On the right side of the navigation bar are icons for home, search, notifications (with a '1' badge), a menu, and a refresh icon. Below the navigation bar, the document title 'Westbay Area Electric-' is displayed, followed by the ID 'US001 / 000000399'. To the right of the ID are three buttons: 'Approve' (blue), 'Deny' (white), and 'Pushback' (white). Below this is a checkbox labeled 'Header is pending your approval'. The main content area is divided into sections: 'Document Summary' with key-value pairs for Source Transaction, Contract Style, Configurator ID, Description, Document Type, and Created On; a 'View Document' link; a 'Clauses' section with a table header and one row; 'Approver Comments' with a text input field; and an 'Approval Chain' section with a right-pointing arrow.

Westbay Area Electric-  
US001 / 000000399

Header is pending your approval

**Document Summary**

Source Transaction Purchase Orders      Description 000000399  
Contract Style PO Document      Document Type Purchase Order Document  
Configurator ID MULTI\_SOURCE\_AUC      Created On February 3, 2020

[View Document](#)

**▼ Clauses**

Clause ID	Title	Effective Date

1 row

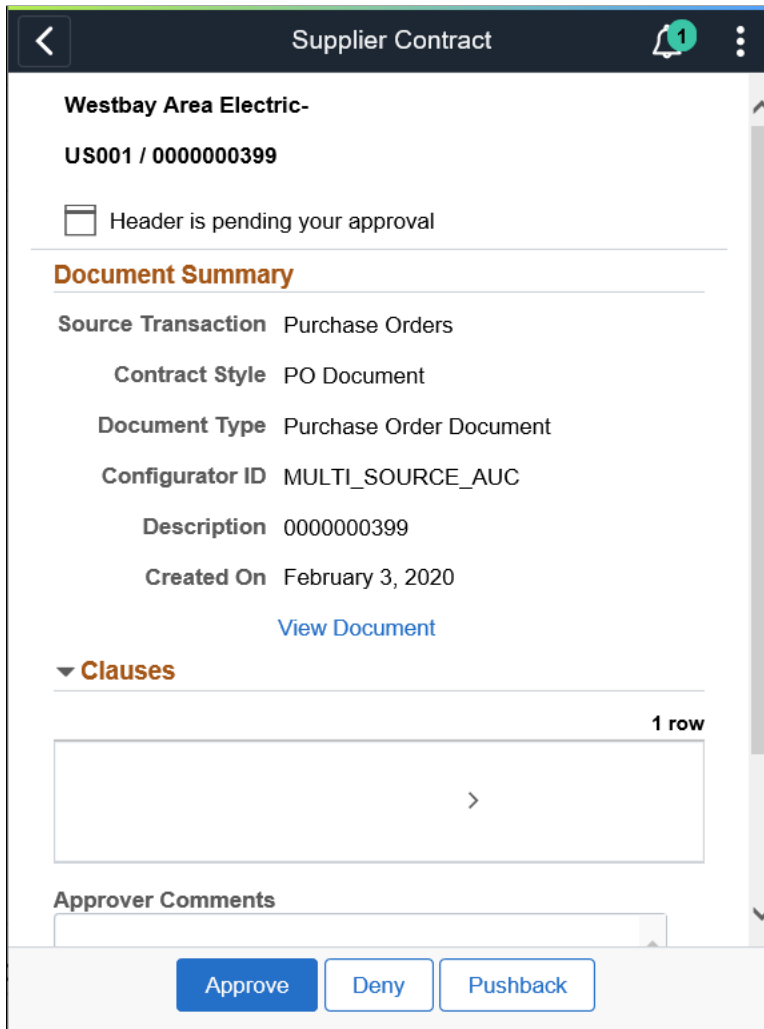
Approver Comments

Approval Chain



This example illustrates the fields and controls on the Supplier Contract Approval Page as displayed on a smartphone. You can find definitions for the fields and controls later on this page.

When viewing an Document on a smartphone, you must scroll down to view the line information, approver comments, and approval chain.



Approvers and reviewers use this page to review, edit, approve, and deny approval for Documents. When you access the page, the system displays a list of Clauses that might need special approval, depending on the Clause-usage settings for approval types related to each Clause in the Document. The system generates this list based on the approval framework Document approval process definition and the definition of the approval type.

<b>Field or Control</b>	<b>Description</b>
<b>Document Summary</b>	Displays the summary of the Document.
<b>More Information</b>	Select to view new Clauses that have been inserted as well as changes to existing Clauses.

<b>Field or Control</b>	<b>Description</b>
<b>Clauses</b>	Select a Clause to review the summary of a Clause.
<b>Comment</b>	Enter comments in the text entry field.
<b>Approval Chain</b>	<p>Select to review approval chain information. You can expand or collapse approver information for each line by selecting the Expand/Collapse icon. You can also select the approver name to view approver details.</p> <p>The approval chain reflects approval status generated by the Application Workflow Engine (AWE). For more information about using AWE workflows, see "Approval Framework Overview" (Approval Framework).</p>
<b>Approve, Deny, or Pushback</b>	<p>Select an action button.</p> <p>When you select an action button, you have the option to select <b>Submit</b> to continue the action or <b>Cancel</b> to back out of the action. Upon submitting the action, the system generates a message that the action is successful.</p> <p>Select the Pushback button push back the document to the previous approver. You can provide comments as to why the document has been pushed back. The previous approver is notified when the document is pushed back. Based on the comments, the approver can take necessary actions and resubmit the document for approval.</p>
<b>View Document</b>	Select to access the Document. The Document is downloaded and opens in PDF format.
<b>View Amendment</b>	<p>Select to view or edit the amendment file.</p> <p>This file tracks a summary of changes in the Document.</p>
<b>View Executive Summary</b>	Select to view an executive summary of the contract Document. The executive summary is available for all internal users who have view access of the Document. This link is available only if the file exist.

## Approval Line Detail Page

Use the Approval Line Detail page (EOAWMA\_TXNLDTL\_FL) to review the display-only Clause summary.

Navigation:

Select a Clause line in the Clauses section on the Supplier Contract Approval page.

This example illustrates the fields and controls on the Approval Line Detail page.



This example illustrates the fields and controls on the Approval Line Detail page as displayed on a smartphone.

**Approval Line Detail**

---

**Clause Summary**

---

**Clause ID** CL\_PERFMSTD01

**Description** Performance Std Clause

**Effective Date** January 1, 2005

**Title** Performance Standard

**Text** Performance Standard Supplier agrees to perform and provide any necessary support for the Products and/or Services described in this Agreement to the satisfaction of the University and with the standard of care and skill of an expert regularly rendering services of the type required by this Agreement and in conformance with state and federal law.

# Setting Up and Creating Amendments

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## Understanding Contract Document Amendments

These topics discuss:

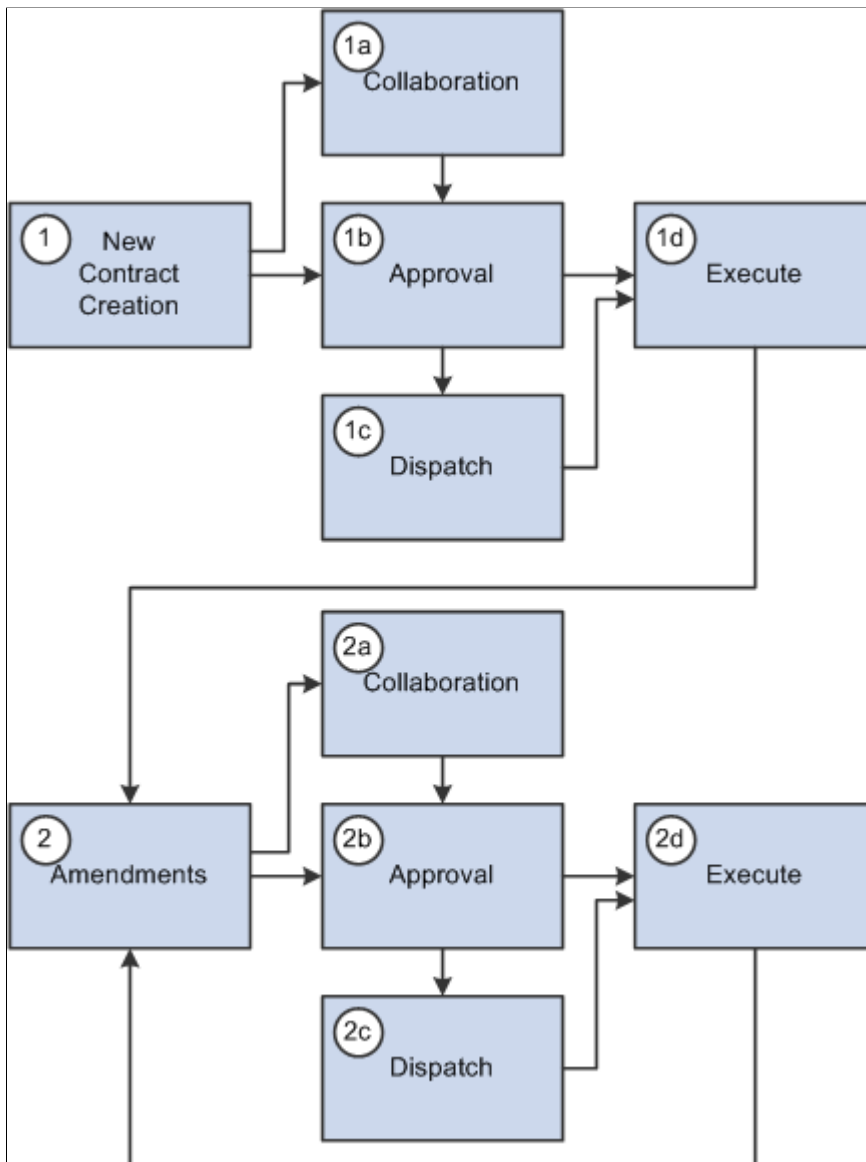
- Contract amendments.
- Amendment processing.
- Amendment steps.

## Contract Amendments

A contract document amendment is an update to an existing executed contract document. Amendment processing occurs after you execute the original contract document. An amendment update can result from changes in source transactions or changes in contract terms in the document.

Document amendment capability is available for all documents when you are not using document types. When you are using document types, amendment capability is available for documents that use document types that have been selected to use **Full Life Cycle Statuses** on the Document Type page.

This diagram illustrates that you can create and complete amendment processing in the document life cycle:



Supplier Contract Management provides life-cycle process tasks to support amendments and uses the same document life-cycle functions, such as collaborations, dispatch, change control, execution, and history tracking, during amendment processing. File processing and approvals are different in amendment processing than in the original document. The amendment approval process uses different criteria to select who should approve the original document. You can change the approval process by configuring the workflow process.

Supplier Contract Management provides three options for processing amendment updates. The system generates and manages document processing based on an amendment option. When you initially create an amendment, you can override the amendment option default value using the **Amendment Option** field on the Create an Amended Version page. After you select a process option, you cannot change the option for later amendment cycles. Amendment options are:

*Amend Contract Only:* This option supports a single-document process during which you can make changes to the original document that has been executed. The system makes a new copy of the executed document at the beginning of the amendment process.

*Amend Contract with Amendments:* This option supports a two-document process during which you can make changes to both the original executed document and a newly created amendment file. The system creates a new amendment file for each amendment cycle. When you create an amendment using Amend Contract with Amendments process option, the system provides **View** and **Edit** buttons for both the amended document and amendment file. This makes it possible to automatically update the amendment file using checked in changes that you made to the main document without having to check out the separate amendment file.

*Amendment Files Only:* This option supports a single-document process during which you can make changes to the a newly created amendment file. The system creates a new amendment file for each amendment cycle.

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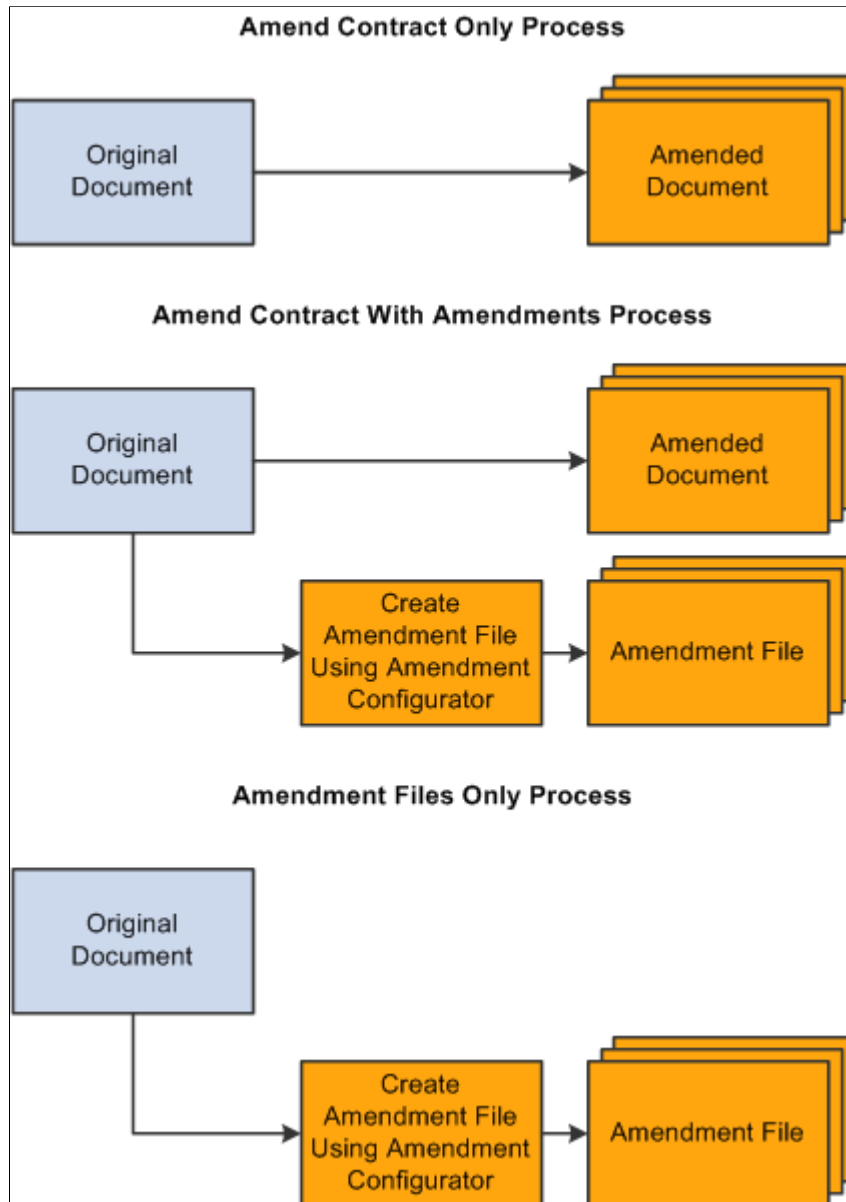
**Note:** When you import documents using the Amend Contract with Amendments or Amendment Files Only options, and create a new separate amendment file for the document in the document authoring system, that amendment is a system-generated Microsoft Word .xml file format and requires that you define an amendment configurator.

Also, the import option you use to import an amended contract and amendment files remains as the process option for the contract. You cannot change the option when creating additional amendments within the document authoring system.

---

See [Importing Documents](#).

This diagram illustrates all of the amendment processes that you can use to create an amendment:



## Processing Contract Document Amendments

Processing amendment documents is similar to processing an original contract document. The system processes functions such as viewing and editing documents, collaboration, approval, and comparisons for amendment files in the same manner as it does for the original document. The amendment processing option controls which files and the number of files the system processes.

When you are using the Amend Contract with Amendments process option, the system provides separate **View** and **Edit** buttons for both the amended document and amendment file. This makes it possible to automatically update the amendment file using updates that you made to the amended document.

## Related Links

[Understanding Document Life Cycles](#)

[Creating Document Amendments](#)



## Amendment Processing

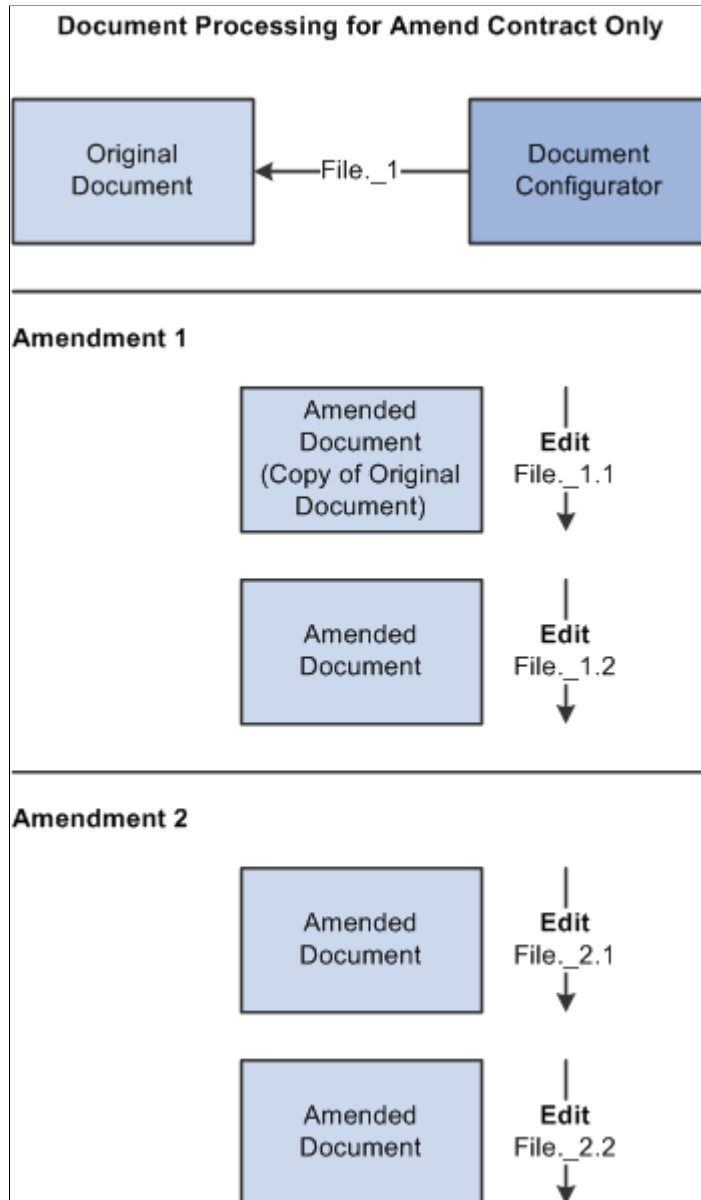
Accessing and processing amendment documents is slightly different than using standard documents. Typically, you have a single document that you access, edit, and process through its life cycle. Amendment processing and document management vary from organization to organization. Differences can exist in the number of documents that you use to capture the changes and what happens to the documents during amendment processing. For example, document authors might make changes only to the original contract document and amendment processing then approves, dispatches, and executes a new version of the original document. Conversely, authors might create a separate amendment document as an appendix or an addendum in which they summarize changes but do not permit changes to the original contract document. In this case, amendment processing applies to a new and separate amendment document.

To address different organizational needs, Supplier Contract Management provides flexibility in amendment processing.

### Amend Contract Only

Use the Amend Contract Only amendment process option when the business process is to always change (amend) the actual contract document with any changes for each amendment cycle. The system makes a copy of the original executed document before the amendment and automatically assigns a sequential amendment number based on the amendment cycle. You have the option to control the version number of the amended document. You can select a major or minor version change or select not to change the version in the original document during amendment processing. You can optionally reset the version number back to 0.0 as each amendment cycle starts so that internal users can understand the version of the amendment as it changes over time. The behavior for this type of amendment is the same as the original life-cycle processing.

This diagram illustrates the process flow when you use the Amend Contract Only process option:



**Note:** Version and file numbers vary depending on your specifications as you create and modify amendments.

In the example, the system created the original document using a document configurator, and it has processed the document through its life cycle to an Executed status. When Amendment 1 was created, the current executed document was at version 1.0, and the user selected to use minor version numbering that resulted in the amended document version number starting with 1.1. Later, the user used minor version numbering again as the document was checked in after editing. With a minor version, the system updates the version using a decimal place, such as 1.1 or 2.2, as shown in the example. For Amendment 2, the user selected to increment to a major version 2.0 and edited the document as 2.1 and 2.2, respectively.

## Amend Contract with Amendments

Use the Amend Contract with Amendments process option when you want the business process to amend the main contract with all changes, and additionally maintain a separate amendment file that contains a summary of the changes that have been made since the last executed contract. This option is useful if you want to highlight changes that have been made to a large contract in the amended contract.

Using this process option, you can optionally setup an amendment configurator to automatically update the amendment file with updates that you made to the original main document. When you check in changes made to the main document, the system provides an option to update the separate amendment summary file automatically based on a server process that does a Microsoft Word compare of the last executed document to the latest changes made. After the file is automatically updated, you can edit the amendment summary to review and make additional changes to it.

---

**Note:** The amendment file must use an amendment configurator that contains a single amendment placeholder type section in it. The system uses the placeholder section to record added, updated, and deleted text in the main amended document, and then includes section in the document.

---

By enabling you to maintain both a fully amended document and a separate amendment file, the system helps you update the actual contract document as you go through amendment cycles. At the same time, the system maintains another summary amendment file that coexists with the amended contract. The summary amendment file highlights and summarizes the changes made to the contract.

You have the option to control the version number of the document. In this case, the version numbers apply to both files as a unit. You can select a major or minor version change or select not to change the versions for both the original document and the amendment file as a set. The system creates new amendment files using an amendment configurator for each amendment it creates.

With this option, when dispatching or sending amendments to contacts, you can send any combination of the following:

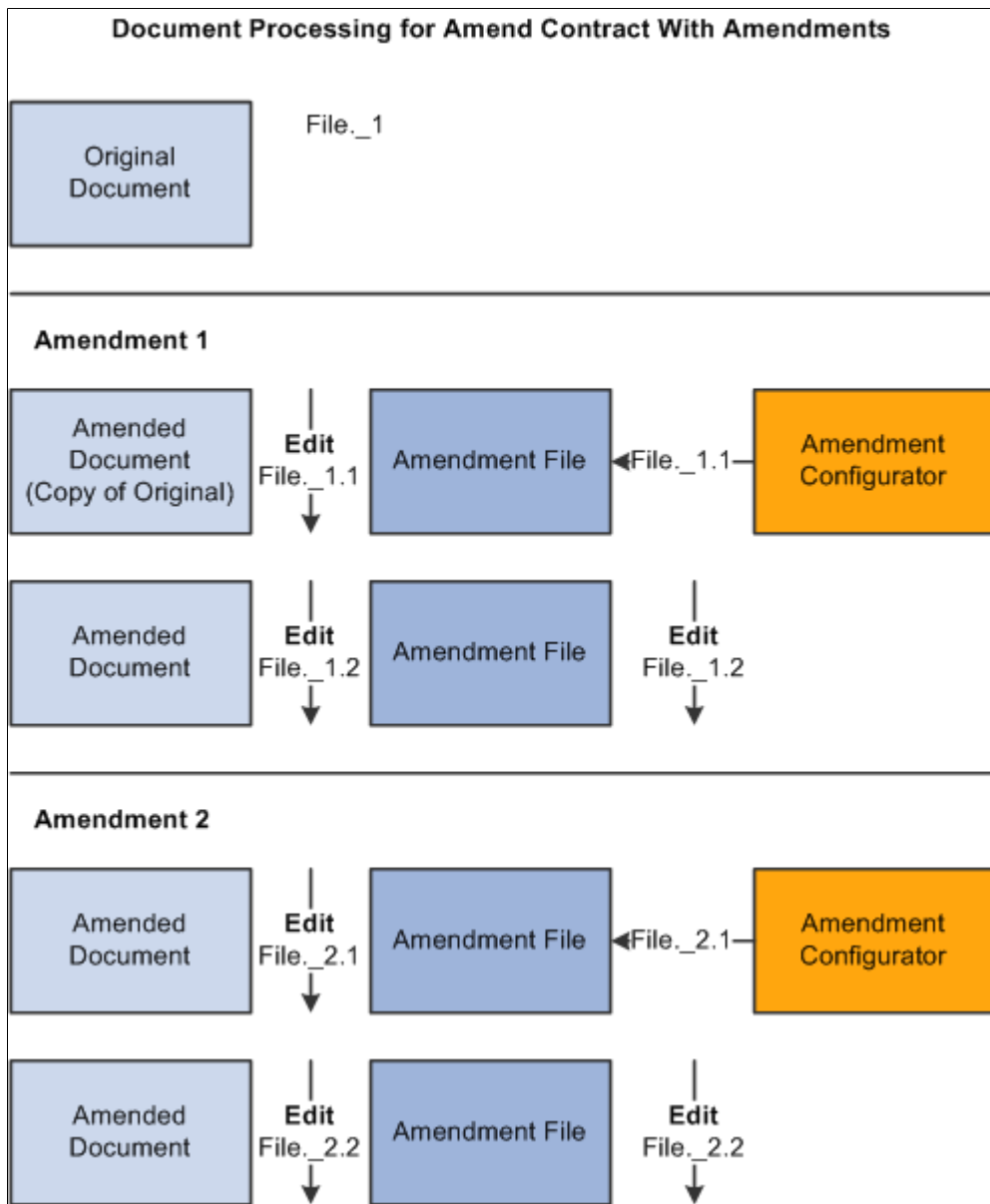
- Original executed contract.
- Current document.

This document is the current amended document with which you are working.

- Most recent amendment file or all amendment files.

For example, if you have had four amendment cycles, you have the choice of sending amendment files for amendments one, two, three, or four, or just the amendment file for amendment four.

The diagram illustrates an example of document processing for the Amend Contract with Amendments process option:



In the example, the amendment file is created using a configurator with the **Use for Amendments only** check box selected on the Document Configurator Definition page. The system generates two files that you can select to view or edit individually using the Document Management page. The first file is the amended document, which is a copy of the last executed contract and serves as a revised contract. The second file is the amendment file, a separate document based on an amendment configurator. This file contains summary information about the changes made to the actual amended contract. The system always treats these two files as a set for any action such as editing the amendment.

### Amendment Files Only

Use the Amendment Files Only process option when the business process is to only maintain an amendment file that contains the summary of changes, leaving the actual contract document in its original

Executed status. With this option, you view, edit, and check in documents for the amendment file. The original contract document is a view-only file.

You have the option to control the version number of the amendment file. You can select a major or minor version change or select not to change the amendment file version during amendment processing. The system creates a new amendment file using an amendment configurator for each amendment that you create.

With this option, you can dispatch or send documents to contacts using any combination of these options:

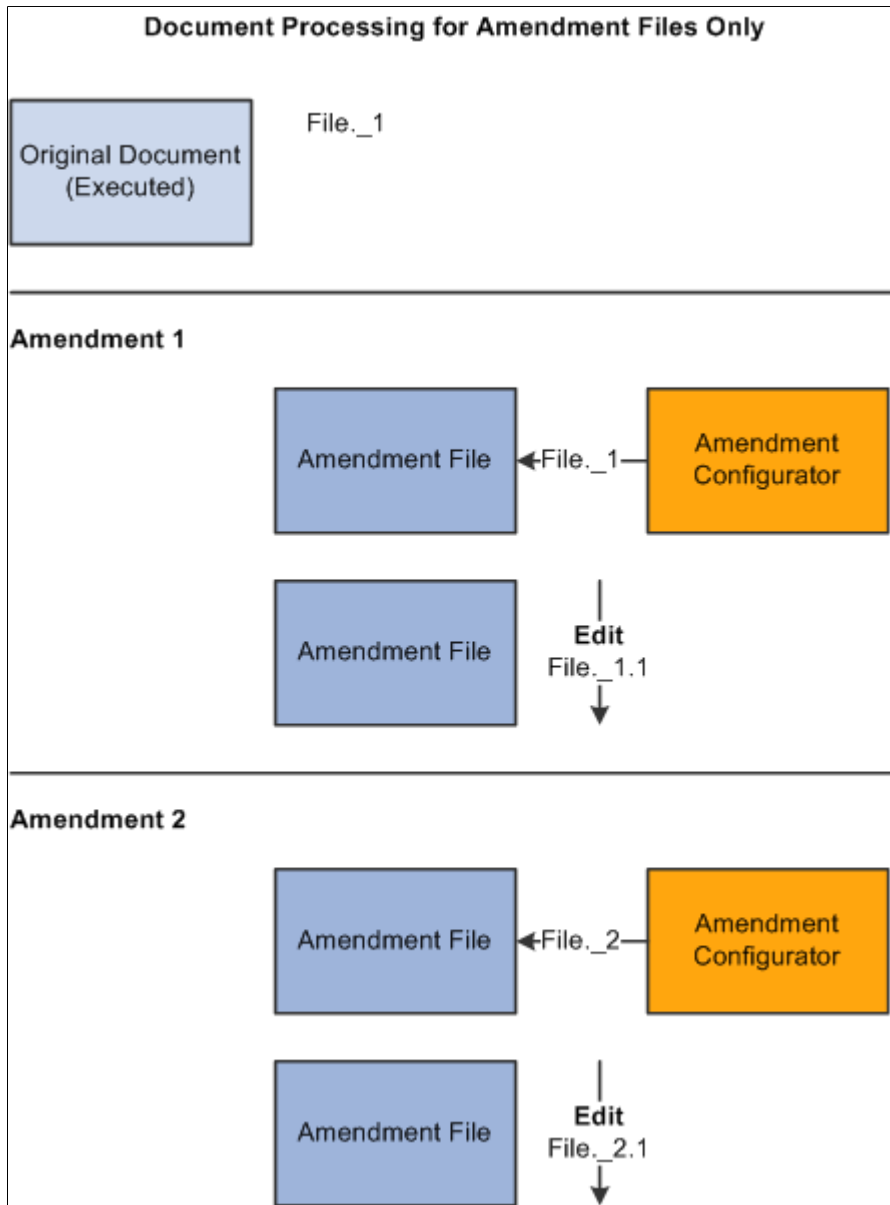
- Original executed contract.

This document is the current amended document with which you are working.

- Most recent amendment file or all amendment files.

For example, if you have had four amendment cycles, you have the choice of sending amendment files for amendments one, two, three, or four, or just the amendment file for amendment four.

This diagram illustrates an example of document processing for the Amendment Files Only process option:



With this process option, you can view the original executed document using the Document Management page. Since all the other actions on the page, such as view and edit, relate to just the amendment file, this provides an easy way to view the actual executed contract.

To view the original document, click the **View Original Document** button on the Document Management page. Click the **View Amendment File** button or the **Edit Amendment File** button to view or edit the amendment file.

### Amendment Comparisons

You can create as many amendments as you need throughout the life cycle of a contract document. You can also generate Microsoft Word comparisons of the original document. The purpose of the comparisons is to facilitate the creation of amendments based on transactional data changes and to highlight the effect of any changes to bind variables, such as an item change on the transactional contract.

You can base comparisons on:

- The current version of the contract and a newly generated contract version.
- The current version of the contract and a refreshed version of the current version of the contract.
- The current version of the contract and the last-executed contract.

## Amendment Steps

These topics discuss using an amendment process option to add an amendment. As a buyer and contract document owner, you create a construction contract for a new building. You and the builder sign off on a set of plans that calls for a concrete driveway with a contract line specifying the material and cost of the driveway. You use the Attachments feature to attach plans and surveys to the executed contract document. During construction, you decide to replace the driveway with asphalt construction.

In addition, you know that for this contract you will always maintain amendments separate from the executed contract, and there is no need to update the original executed contract along with the amendment.

Using the document authoring system you can:

1. Create an amendment document configurator that meets the needs of the contract change.

When you create a document configurator for use with amendments, you must select the **Use with Amendments only** check box on the Document Configurator Definition page. Amendment configurators can be defined as a simple generic templates that perhaps contain clauses with references back to the original contract information, or you can define them to be more complex or specific in nature to contain rules and clauses that explain the type of change specific to the original type of contract that is being amended.

---

**Note:** Generally, you define amendment configurators as part of setting up the library, so this would not be a typical step for creating an amendment.

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2. Open the purchasing contract related to the new building to update the line item information to indicate the change to asphalt.

Assume that the item information is present in the original contract through the use of a repeating clause and transactional bind values for the contract item, description, and so on. At this point, the current executed contract document lists the original information about the use of concrete, but not the use of asphalt.

3. Click the **Maintain Document** button.

The system opens the Document Management page. When the building contract document was initially executed, the system activated the **Create Amendment** button.

4. Click the **Create Amendment** button to define amendment processing information.

You select the process option for use with the amendment. Depending on the process option, you can select the amendment configurator that you created for the contract changes to create the amendment. For this example, you want to store amendments separately from the original executed contract, and will not update the existing contract.

5. Select the *Amendment Files Only* process option on the Create Amended Version page.

In addition, you can select the version numbering format and add comments pertaining to the amendment. The system generates the draft version of the amendment using the configurator you selected. It generates the amendment number starting with one. If you create additional amendments, you can reset the separate internal version number for the document to zero at the start of each amendment, or you can continue using the version numbering from the original contract.

---

**Note:** You can only have one amendment in process at a given point in time for a contract.

---

6. Click the **OK** button to begin system processing.

Depending on the amendment configurator definition, the system includes the appropriate information, such as content and bind variables, in the amendment file. For example, if you include a repeating section that contains the contract items as did the original contract, the system creates a complete list of the latest items, including the newly added asphalt item, in the amendment.

You use this information as a starting point for modifying the amendment file. Because you selected the Amendment Files Only process option for this contract, the system uses only the separate amendment file as you edit and check in the document.

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**Note:** This example is dependent on how you use the transactional purchasing contract because the transactional contract is not version controlled and always contains the latest version of the transactional contract information. It might be more appropriate in some situations to generate an amendment without purchasing transactional contract information, manually add information to the amendment, and, after the amendment is executed, update the transactional purchasing contract.

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7. Collaborate and approve the amendment.

In this step, you collaborate and obtain internal approvals depending on the amendment requirements. These process steps can be the same as the original document processing or simplified for each amendment based on the requirements and the workflow configuration you are using for the amendment.

8. Dispatch and execute the amended contract similar to processing the original document.

You perform this step after any collaboration is complete and the new amendment is agreed upon by you and the builder. The system sets the contract document status to Executed and makes the **Create Amendment** button available again in case additional amendments are required in the future.

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**Note:** The system processes ad hoc document amendments similar to purchasing contracts. Two steps change in the previous example when the system is processing an ad hoc amendment. In step 2, to open an ad hoc contract, you use the Document Management page and step 3 is not needed. Life-cycle processing for an amendment is the same for both ad hoc and purchasing contract documents.

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## Understanding Amendments for Imported Documents

You can import legacy contracts and existing amended contract versions along with their amendment files and manage them similar to how you use amendments created in the document authoring system. For active contracts, you should import the current editable version of the contract so that you can use the edit



function directly from within the document authoring system to modify new versions or amendments of the document.

If you import a read-only document, such as a .pdf file, the system limits the edit and amendment options to the application you use for the edit. You can; however, in the case of a .pdf file, select to amend the original document on a local system, outside of the document authoring system, and then check in the edited .pdf amendment.

You can amend imported documents depending on the original import option you select to import the document. When you import a file and you are also importing amendments, you determine which process option that the document authoring system uses amendment option based on the import option. This cannot be changed after the document is imported and is similar to how an amendment process option cannot be changed after the first amendment is created for a generated document.

To import a document, you select the **Import Document** button on the Create Document page. Importing a document is a document creation method that enables the import and creation of amendments as well. Using the Import Document page, you can select to import:

- A single current contract as amended and assign an amendment version. (Amend Contract Only process option)
- The current contract as amended and a current separate amendment summary file. (Amend Contract with Amendments process option)
- The original contract as originally signed and a current separate amendment summary file. (Amendment Files Only process option)

When you import documents using the Amend Contract with Amendments or Amendment Files Only options, and create a new separate amendment file for the document in the document authoring system, that amendment is a system-generated Microsoft Word .xml file format and requires that you define an amendment configurator.

## Related Links

[Importing Documents](#)

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# Understanding Amendments Linked to Source Transactions

This topic describes special considerations regarding source transactions, including purchase order and purchasing contract transactions and amendment processing as it relates to using bind values in amended documents. The descriptions use a purchasing contract as the example source transaction, but you can apply the descriptions to purchase order transactions as well.

This list provides information about how the system processes each amendment process option when it re-creates or refreshes bind values as part of a purchasing contract amendment:

- Amend Contract Only

You do not use separate amendment files with this option, instead you update a new version of the fully amended contract document. Thus, all transactional bind variables that exist in the original contract document also exist in the amended contract. In this case, when you create an amendment,

the system uses the last executed version of the contract document as the starting point for the amendment. An amendment configurator is not required.

While the system enables you to re-create the fully amended version of the contract document, you would not typically re-create the document because you would lose any manual edits to the original contract in the new version of the amended contract document. You can; however, use the Refresh Document option since it automatically updates all bind values from the existing transactional purchasing contract into the fully amended version of the contract. The system attempts to keep all of the previous manual edits as part of refreshing the document.

See [Refreshing and Re-creating Documents](#).

- Amend Contract with Amendment Files

This option is similar to the Amend Contract Only process option. But, in addition, you are simultaneously maintaining a separate amendment file for each amendment that highlights the changes related to each amendment. In this case, re-create and refresh processing for the fully amended contract document are the same as those discussed in the previous bullet for the Amend Contract Only process option. In addition, during the creation of the separate amendment file, the amendment configurator is important for controlling content.

Initially, the system generates the separate amendment file, and during the process, it retrieves transactional binds from the purchasing contract for inclusion in the separate amendment file only. The system includes the current information on the transactional purchasing contract in the amendment file.

Depending on the type and order of changes to the transactional procurement transaction, refreshing or re-creating information in the amendment file can be of value. For example, if you change items on the transactional contract only after you execute an amendment, you might include the current list of items to generate the first time the amendment file is created, followed by an automatic or manual update for an additional or changed item within the amendment file. After you execute the amended document, you can update the transactional procurement contract for the additions and changes.

- Amendment Files Only

This option is similar to the Amend Contract with Amendment Files process option when you are working with the separate amendment file, and re-creating and refreshing the amendment file. With this option, you never modify the original contract, and each amendment starts with a new, separate amendment file.

## **Related Links**

[Refreshing Microsoft Word Documents](#)

[Generating Microsoft Word Documents](#)

## Setting Up System Values for Amendments

### Pages Used to Set Up System Values for Amendments

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Document Format and Options Page</u>	CS_CONFIG	Select an default value when amending documents.
"User Preferences - Supplier Contract Management Page" (Application Fundamentals)	CS_CONFIG	Define user preferences for document authorizations. Document authorizations for processing two file formal amendments or a single file amendment are the same as for processing documents. They use the same settings and options.
<u>Document Configurator Definition Page</u>	CS_TMPL_TBL	Define amendment configurators.

### Document Configurator Definition Page

Use the Document Configurator Definition page (CS\_TMPL\_TBL) to define amendment configurators.

Navigation:

**Supplier Contracts >Manage Contract Library >Document Configurators**

Use this page to indicate that a document configurator is intended for use with an amendment file. When you amend contracts with formal amendment files, the system requires an amendment configurator ID. Use the **Use for Amendments only** check box to associate a configurator to be used for creating amendment files. When you select this check box, the system makes this configurator available in the list of amendment configurators when creating amendments.

Also, make sure that you update the **Availability Status** field to *Available* after you complete the amendment contents.

When you create a formal amendment, you can use the amendment configurator to design the amendment contents. For example, you can create an amendment introduction section, develop clauses to include in the amendment, and include binds and rules as you would in the original document.

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**Note:** You cannot include contract wizards in amendment configurators. This option is disabled when you select the **Use for Amendments only** check box.

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### Related Links

[Setting Up Document Configurators](#)

## Creating Document Amendments

### Pages Used to Create Document Amendments

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Create an Amended Version Page</a>	CS_DOC_VERSIONS_SP	Create amendments.
<a href="#">Document Management Page</a>	CS_DOC_MAINT	Update amendment files. See <a href="#">Updating Amended Files Automatically Using the Document Management Page</a>

### Create an Amended Version Page

Use the Create an Amended Version page (CS\_DOC\_VERSIONS\_SP) to create amendments.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management.** Click the **Create Amendment** button on the Document Management page.

Use this page to create an amendment and define how you want to process amendments to an original document. You can access the page only after the contract document has been executed. You create an amendment and process it through the approval, dispatch, and execution cycles, after which you can create another amendment. The system stores a version of the document for each amendment. The system provides a sequential amendment number at each amendment cycle for tracking purposes, but you can control the version number for each revision.

After you create the amendment, you continue to use the Document Management page to process the amended document, the amendment files, or both through the life cycle in the same way that you process an original document. The amendment process uses many of the life-cycle features that are described in the [Understanding Document Life Cycles](#) topic.

In addition, you can perform amendment processing using one of these process options:

- *Amend Contract Only:* This option supports a single-document process that you use to make changes to the original document that has been executed. The system makes a new copy of the executed document at the beginning of the amendment process.
- *Amend Contract with Amendments:* This option supports a two-document process that you use 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. When you create an amendment using the Amend Contract with Amendments process option, the system provides view and edit buttons for both the amended document and the amendment file. This makes it possible to automatically update the amendment file using updates that you made to the amended document.

See [Updating Amended Files Automatically Using the Document Management Page](#).

- *Amendment Files Only*: This option supports a single-document process that you use to make changes to the a newly created amendment file. The system creates a new amendment file for each amendment cycle.

<b>Field or Control</b>	<b>Description</b>
<b>Amendment Option</b>	<p>Select how you want to process the amendment. This field initially displays the format and option default value that you defined in the <b>Amendment Creation Default</b> field in the Document Format and Options component. You can override the default setting by selecting another option. If an amendment has been processed for this document, the field displays the initial selection and cannot be changed.</p> <p>The initial amendment option that you use to create the first document amendment remains the same for the life of the document. So, if you select to amend the contract only, where all changes are made directly in the original document, you cannot change it later to create a formal amendment document.</p> <p>The system generates the document based on the amendment option. Amendment options are:</p> <ul style="list-style-type: none"> <li>• <i>Amend Contract Only</i>: Select to revise the contract and generate one amended document with all of the changes applied directly to the last executed contract.</li> <li>• <i>Amend Contract with Amendments</i>: Select to generate both a separate amendment file, as an appendix or addendum, and a copy of the last executed main contract document that you can revise to also include the changes specified in the amendment. The system processes these two files as a set and all actions pertain to both files. One file is the amended contract that contains all the revisions and the other is the amendment file that summarizes the changes or contains any additional information.</li> </ul> <p>When using the Amend Contract with Amendments option and an amendment placeholder section exists on the amendment configurator, the system also provides a document check-in option that automatically updates the amendment file based on changes that you made to the amendment document. This saves you time in updating the amendment file manually.</p> <hr/> <p><b>Note:</b> To use the automatic update amendment file feature, you must use an amendment configurator that contains a single amendment placeholder type section in it. The system uses the placeholder section to record added, updated, and deleted text in the main amended document, and then includes the section in the document. After you automatically update the amendment file at least once, the system displays an additional button within document management that enables you to do final edits for the amendment summary.</p> <hr/> <ul style="list-style-type: none"> <li>• <i>Amendment Files Only</i>: Select to generate just the amendment file. With this option, the executed contract remains as is and is not modified and all changes are only listed in the amendment file.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Amendment Configurator ID</b>	<p>Select a configurator on which to build a new amendment document. You can select a new configurator for each amendment cycle.</p> <p>This field is available if you selected either the <i>Amend Contract with Amendments</i> or the <i>Amendment Files Only</i> value in the <b>Amendment Option</b> field.</p> <p>An amendment configurator is one that has been built specifically for use with an amendment file. Any configurator that has the <b>Use for Amendments only</b> check box selected on the Document Configurator Definition page is available for selection in this field as long as its status is Available.</p>
<b>Version</b>	<p>Select the version level at which you want the system to record the amendment. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Reset Version back to 0.00</i>: Select to start the version numbering of the document again. While the version returns to 0.00, the version history still reflects any updates and changes to the document and the original version number for each update. The amendment number will always increment for each cycle to retain amendment cycle history. This field is only available if you select the <b>Allow Check-In as Same Version</b> check box on the Document Format and Options page.</li> <li>• <i>Minor Version</i>: Select to indicate this amendment update is a minor update. You can determine minor and major versions by organizational standards or at the owner's discretion.</li> <li>• <i>Major Version</i>: Select to indicate that this amendment is a major update.</li> </ul>
<b>Comments</b>	<p>Comments are required when you create an amendment and are displayed on the Document History page.</p>

### Related Links

[Importing Original Contracts and Amendment Files](#)

[Amendment Processing](#)

## Updating Amended Files Automatically Using the Document Management Page

Use the Document Management page (CS\_DOC\_MAINT) to update amendment files automatically.

Navigation:

**Supplier Contracts > Create Contracts and Documents > Document Management**

Before you can use the automatic update of amendment files feature, you must perform these set up requirements:

- Select the **Enable Compare Functionality** button on the installation options Supplier Contract Management page.

This enables the system to compare your main amended contract with the last executed version.

- Define an amendment placeholder section using the Section Definition page.

To access the page select **Supplier Contract Management > Manage Contract Library > Sections**. Use the **Section Type** field to select the *Amendment Placeholder* value as the type of section.

- Include the amendment placeholder section in the amendment document configurator.

The location where you place the amendment placeholder section in the amendment configurator determines where in the document to place the compare results between the last executed contract and recent edits to the main amended contract.

---

**Note:** After you complete the set up and when you check in the main amended contract, the system detects and verifies that the amendment configurator being used is appropriate for automatic updates.

---

When you are using the Amend Contract with Amendments process option, the system provides view and edit buttons for both the amended document and amendment file when you create an amendment. This makes it possible to check out the amended document, make changes, and automatically update the amendment file when you check in the amended document. The **Edit** button for the amendment file becomes available only after you automatically update the amendment file at least once when using this feature.

The changes the system applies to the amendment file are based on the current main amended contract compared to last executed contract. Steps to use the Amend Contract with Amendments option include:

1. Create an amendment for any type of source transaction document that has been previously executed.

Click the **Create Amendment** button on the Document Management page.

2. Select *Amend Contract with Amendments* in the **Amendment Options** field on the Create an Amended Version page. The automatic update of amendments works only with the *Amend Contract with Amendments* option.
3. Select the document configurator for use with the amendment, enter any comments, and click the **OK** button.

The system generates a separate amendment file, as an appendix or addendum, and a copy of the last executed main contract document that you can revise or automatically update to include the changes specified in the amendment. The Document Management page appears next with the view and edit buttons for both files. The **Edit Amended Document** button controls revising the last executed main contract.

4. Click the **Edit Amended Document** button to revise a copy of the last executed main contract document, and make edits to the revised (main) executed document and check in the document.

When checking in the revised document, you can select the **Update Amendment File** check box to initiate the processing that compare the last-executed contract document against the revised document.



This process extracts any additions, changes, and deletions, and inserts them into the separate amendment file as indicated by the amendment placeholder section in the amendment configurator. Because the update amendment option replaces any prior compared changes, you would normally want to do update the amendment file only after all edits have been made to the main contract. When you check in the revised document:

- The system determines changes to contract documents using Microsoft Word to compare current contract document to the last created or executed contract.
- The system detects changes identified by Microsoft Word comparisons that include the additions, changes, and deletions of text within the amendment file.

The comparisons in the document appear below the amendment placeholder section position that you define for the amendment configurator.

- The **Edit Amendment File** button controls updates to the separate amendment file and includes summary changes for the amendment.
- Changes included in the amendment file are intended to be the starting point for editing an amendment file.

While the system includes all text it finds as changed in the compare process, you will likely need to locate and reformat changes in the amendment file to meet your needs.

- The system includes changes in the comparison that you make within a clause object that was originally added from the clause library within the last executed contract.

The entire clause is placed in the amendment file as part of the automatic update and includes a text string identifying the change. Likewise, if a clause is deleted or added while revising the last executed contract, the system calls out these changes and adds them to the amendment file as well.

5. Use the **Edit the Amendment File** button to review and further format changes in the separate amendment file. When an amendment placeholder is present within the amendment document configurator, the **Edit** button displays when you select the **Update Amendment File** check box during check in.

You can also use the **Refresh** button to update the amendment file if you do not want to update the file when checking in the revised contract document.

---

**Warning!** If you select the **Update Amendment File** check box again when checking in or refreshing the file, the system completely updates the Amendment Placeholder section contents. So, it is important to not reformat the contents of the amendment placeholder section in the amendment file until you have finished making edits to the main contract that you are amending.

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# Microsoft Word Integration with Supplier Contract Management

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## Understanding Microsoft Word Integration with Supplier Contract Management

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**Note:** The release of Supplier Contract Management (9.1 Feature Pack January 2012 and forward) supports Microsoft Word 2007 XML, or later versions. If you have existing data in the contract library that was created using Microsoft Word 2003 XML, you must convert your library to move to the Microsoft Word 2007 XML, or later version, format. You can find detailed instructions and information pertaining to the impact of the conversion on My Oracle Support (<https://support.oracle.com>), note number 1329290.1. Oracle's PeopleSoft continue to support Microsoft Word 2003 XML depending on Microsoft Word licenses purchased prior to January 11, 2010. This is due to the loss of custom XML tags support in Microsoft Word.

---

Microsoft Office Open XML (Extensible Markup Language) integration is a core requirement for using the PeopleSoft Supplier Contract Management document authoring system. To effectively use the system, you must have Microsoft Office Open XML versions of clauses, sections, document configurators, and documents. In addition, the system uses XML integration when checking in documents to the PeopleSoft system that were edited using Microsoft Word 2007, or later version.

In the PeopleSoft page, the clause object consists of fields such as **Title**, **Full Text**, and **Reference Text**. Each clause field is in a content control. This example illustrates the content controls, with tags, for a clause as visible within Microsoft Word.

---

**Note:** Typically, content control tags are not visible to most users; however, there might be times when it is useful to view them in a document. Use appropriate Microsoft Word settings to display the content control tags within Microsoft Word.

---

This example from within Microsoft Word illustrates how clause fields appear with their corresponding tags in design mode:

This example illustrates the fields and controls on the Clause XML example within Microsoft Word. You can find definitions for the fields and controls later on this page.

The screenshot shows a Microsoft Word document with several XML fields and controls. The fields are:
 

- «new\_clause» (id) **Solution** (id)
- «title» New clause «title»
- «full\_text» Adding buttons that Insert a rich text control and set properties for the selected control is a simple two-part process. Step one is recording the macro, and step two is adding your recorded macro to the Quick Access Toolbar.
- Recording the Macro:
  1. Open Word and click on the *Developer* Tab.
  2. In the *Macros* group, click the *Macros* button and choose *Record Macro*
 In the resulting Dialog, name your macro new\_clause and choose *All Documents (Normal.dotm)*, under *Store Macro in:*
- «full\_text»
- «new\_clause»

The next section describes how you produce Microsoft Word clause documents using the PeopleSoft system.

## Integration Example

When you create a clause in the system, you open the Clause Definition page as a starting point. This page consists of header information you use to describe and manage the clause's life cycle and contains a set of fields for the content of the clause.

The system stores and manages two types of content. The system stores plain-text content in a system database and it stores rich text format (RTF) content in an XML format in the database. Plain text is a set of characters, tabs, line feeds, and carriage returns. You use plain text on the Clause Definition page and as the starting point for creating a clause and later for searches and comparisons.

Rich-text content consists of an expanded set of special commands to indicate formatting information, such as fonts and margins. You can only enter rich-text content using Microsoft Word. When checking in a document, the system converts the rich text to plain text and stores it in the database. For clauses, the XML version of the rich text is also stored in the database for document generation purposes. For generated documents, the XML version containing rich text is stored on a file server only.

The integration process between Microsoft Word and Supplier Contract Management when you create a clause is as follows:

1. Add a clause using the Clause Definition page.

You define clause header information, such as its description, approval type, and notes. You can enter plain text for the clause's title, full text and reference text. If the text is formatted text, you should enter the content using Microsoft Word by selecting the **Edit Document** button on the page.

2. Click the **Edit Document** button.

The system uses the plain text that you entered along with the header information to create a file that contains the XML version of the clause. It stores the clause header information as attributes on the document file, but it is not visible in the document.

3. Click **Open** on the File Download page.

The page indicates that the file is to be downloaded to a local computer. When you click the button, the system can open the file in Microsoft Word, which reads the XML file and displays the content. This is the content you entered before editing the document.

4. Edit the document using Microsoft Word .

Editing is controlled to areas of the document separated by the content control tags. The content control of a clause is protected from editing to prevent the loss of document structure. You should not delete the content control because it is used to identify areas of the clause content during document check in. In addition, all text should be included within the content control. For example, the text for *Title* must be within the content control for *Title*, that is the highlighted area when the cursor is inside the control. The system ignores any text that you add to a clause, outside of the content control, during document check in.

5. Save the edited file to the file system on the local computer. You must do this before checking in the document to the PeopleSoft system. Typically, you should define a local directory where you store all checked out clauses and documents.
6. Click the **Check In** button on the Clause Definition page.

The system prompts you to select the file to upload from the file system. During the upload process, the system reads the XML file and parses it and separates the file content into two parts. The first part is plain text that updates the database records in the PeopleSoft system. This content displays on the Clause Definition page. The second part of the uploaded XML file contains the rich text, styles and lists used in the document. The system stores rich text in an XML format along with Microsoft Word styles.

When you create or preview a document, the system expands the document configurator content. It uses the stored XML strings that correspond to elements in the document configurator to construct the document XML file. The process flow between the PeopleSoft system and Microsoft Word is similar to the clause creation when you generate or preview the document, except that additional content control tags are present in the document XML file. For example, bind variables tags do not appear in a clause, but they do appear in the document file.

In addition, when you preview or generate a document, the system applies the paragraph styles with the outline numbering that you define in the Microsoft Word template as part of setting up the system.

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**Note:** The document check-in process to the PeopleSoft system does not delete any local files from the client machine. You must do this manually.

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## Microsoft Word Editing Access

In some cases, it might be necessary for you to configure Microsoft Windows so that it automatically opens a document for editing in Microsoft Word rather than opening it with the default Microsoft Word plug-in version in the Microsoft Internet Explorer browser. This is highly recommended for any users who will be editing content. Microsoft Word editing and formatting options may not always be available in the browser-based plug-in.

If possible, you should configure the Microsoft Windows client to launch the native Microsoft Word application for editing clauses and documents instead of using the Microsoft Internet Explorer Word plug-in version. See the Microsoft support web site for more information.

Use the Microsoft support website to configure Internet Explorer to open Word documents using Microsoft Word: <http://support.microsoft.com/default.aspx?scid=162059>

---

**Note:** Files that you download from the PeopleSoft system may have a Read-Only indicator displayed in their banners at the top of the Microsoft Word window along with the name of the file. This might occur if you do not first save the file to a disk as part of the download. This banner does not imply that you cannot edit the file.

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## Related Links

[Setting Up PeopleSoft Integration Broker for Microsoft Word](#)

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## Microsoft Word Search Considerations

As part of Supplier Contract Management functionality, you can optionally provide certain users, such as contract specialists, the capability to search from Microsoft Word for additional clauses in the PeopleSoft clause library. They can perform the search without exiting Microsoft Word or signing on to the PeopleSoft system. This is useful, for example, when you might need to manually select alternate clauses versus using a wizard question and rule to include the clause as part of the generation process. This Microsoft Word integration is accomplished using XML messaging that is partially delivered with the PeopleSoft system. These topics discuss:

- File configuration for Microsoft Word searches using Research task panes.
- Search limitations.

## File Configuration For Microsoft Word Searches Using Research Task Panes

Using the Microsoft Word version that resides on the local system, you can perform searches against a PeopleSoft database for clauses and bind variables. After receiving search results, you can insert clauses or bind variables directly into the Microsoft Word document that you have open. When you insert the clause or bind using this method, the content control tags identifying it are also included which enables the system to better recognize when you include new content from the library into the document.

The search function used by Microsoft Word uses synchronous XML messages to integrate with the Supplier Contract Management system. The messages are read by the messaging gateway that processes the searches in the PeopleSoft Supplier Contract Management database. The system returns search results to the Microsoft Word - Research task pane. Administrators install the necessary search functions on selected client machines as part of the setup process.

Before you can use the search function, contract or system administrators must configure the search program configuration file prior to using it with Microsoft Word. The configuration file specifies the gateway information to link Microsoft Word and the Supplier Contract Management system.

## Related Links

[Setting Up PeopleSoft Integration Broker for Microsoft Word](#)

## Search Limitations

The search capability from Microsoft Word to PeopleSoft does not require a separate sign on to the PeopleSoft system. It uses the default local messaging node and the PeopleSoft user who is defined for that node to run clause and bind variable searches. Therefore, when you enable searching, you enable users to search for any clause or bind variable defined in the database.

While working with documents using Microsoft Word, you can perform searches against PeopleSoft databases. Using search results, you can locate clauses and bind variables that exist in the document authoring system and insert them into the current clause or contract document.

When you search for clauses using an authored document in Microsoft Word, the size of the XML format information can exceed limits on the client side when it's too large. Therefore, the search result is limited by the PeopleSoft system to results with twenty instances.

---

**Note:** Even when clauses contain small amounts of text, the system can still send a large amount of hidden formats and styles in addition to the object content.

---

When the search reaches this limit, the system displays a warning to you within the Microsoft Word - Research task pane that states: **\*\*\* Searching on above keyword, resulted in more than 20 matching clauses -- returning only the first 20. Please refine your search criteria to narrow the results. \*\*\***. To resolve this issue, you can search for a more specific string to render fewer than 20 results in the result.

---

**Note:** When you insert clauses into documents, it's possible to have situations where a clause and its content control is inserted within another clause's content control. This will not cause an error or warning and you can still check in the file to the PeopleSoft system. When you check the document into the PeopleSoft system, the document administrator can use the **Document Modification Summary** link on the Document Management page to view new clauses that have been inserted as well as changes or deletes to existing clauses.

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## Related Links

[Setting Up PeopleSoft Integration Broker for Microsoft Word](#)

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## Supported Microsoft Word Settings

Some Microsoft Word settings might include special characters or special XML tags in the document to format the document. For example, the Microsoft Word - Smart Tags feature might provide data types for content that might include, dates, addresses, and telephone numbers.

When you type text into a new document or open an existing document, these special characters or tags can become part of the XML that represents the document when you save the document. When the Supplier Contract Management system parses the XML file during the check-in process, errors can result from some special characters, missing content, or other conditions for which the check-in program does not check.

---

**Note:** It is important to disable some of the special features, such as Smart Tags in Microsoft Word, specifically when maintaining PeopleSoft-related clause and section content in Microsoft Word. This reduces the chance of XML parsing issues with clauses and sections in the PeopleSoft parser and the document generation process. This is important for the clause library itself so that it can generate documents correctly with properly structured XML.

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### **Related Links**

[Troubleshooting Integration Issues](#)

[Implementation and Setup](#)

[Contract Library Setup](#)

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## **Format and Style Considerations in Microsoft Word**

These topics discuss:

- Styles and formatting.
- Templates.
- Sample templates.
- Formatting application.
- Style planning.
- Style application.
- Microsoft Word paragraph styles and outline numbering in document generation.
- Overriding styles.
- When to add styles to templates.
- Steps for adding styles to templates.
- Style examples.

### **Styles and Formatting**

A style helps you format text in a document. Microsoft Word styles exist to help you do both simple and complex formatting. In Microsoft Word, you can apply formatting to a document directly using the functions from toolbars and menus. For example, to format a heading, you could use the **Bold** button and the **Font** type and **Font Size** boxes on the Formatting toolbar. But if you had numerous headings in the document, for each similar heading, you would have to repeat the same functions for each heading to consistently format all the headings in the document. A Microsoft Word style can enable you to define and reuse a set of formatting functions throughout the document.

There are multiple types of styles in Microsoft Word such as paragraph, characters, list, and table.

The Supplier Contract Management system requires that you use Microsoft Word paragraph styles to generate content because a document consists of a series of paragraphs with different numbering and



indentation. You define these paragraph styles the Microsoft Word template that is associated with each document configurator you create. By defining and using paragraph styles, you create consistent methods of formatting and numbering content in authored documents. Users of authored documents can also use additional Microsoft Word styles in generated documents.

See Microsoft Word - Help and web sites provide information that pertains to features and functionality of Microsoft products.

See [Styles and Formatting](#).

## Templates

You use a Microsoft Word template file to manage styles and formatting for each document. The template file contains all of the paragraph styles that you can use in a generated document. For example, if you click the **New** and **Blank Document** buttons in Microsoft Word, a blank document appears in which you can enter text. This is a file and all of the formatting default values for it are determined by its template, which is a normal.dot file. The .dot file extension is for templates.

The Supplier Contract Management system uses a Microsoft Word template file to manage styles during the generation of the document. The system provides sample templates with the system's sample data to provide you an example of how you can define templates for use with documents.

---

**Note:** Supplier Contract Management uses XML for all document content and for the Microsoft Word template. The file extension for the Microsoft Word template is .xml, but the system uses it in a similar manner as the Microsoft Word .dot file. You can use any Microsoft Word template, but you must first save the file using the Word XML Document type.

---

While Supplier Contract Management uses Microsoft Word templates they are not used in the traditional manner. The system uses the Microsoft Word template as a starting point primarily to obtain paragraph styles that control the appearance of document content as the system assembles the document. When you preview a clause, section, or document configurator or you generate a document, the system first checks the setup information and locates the actual template file on the file transfer protocol server.

---

**Note:** In Supplier Contract Management, Microsoft Word templates are not intended to store content. You use them to define valid paragraph styles to apply when the system generates a document, or when you preview a clause, section, or document configurator. The Microsoft Word template can also contain optional table of contents and header and footer fields that you can apply when the system generates contract documents.

---

Since the use of Microsoft Word templates in Supplier Contract Management is most likely different from how you currently use templates, you should review the "Defining Default Settings for Document Formats and Options" section before creating and uploading Microsoft Word templates.

See [Setting Up Document Formats and Options](#).

## Sample Templates

The PeopleSoft installation CD provides a sample Microsoft Word template file. The STDTEMPLATE\_2007.XMLtemplate contains Microsoft Word paragraph styles and outline numbering that is used in the PeopleSoft sample database. This file is included in the WINWORD folder in the PeopleSoft installation CD.

---

**Note:** The sample databases include the definitional row for the STDTEMPLATE\_2007.XML in the Document Template and Styles setup component; however, you need to perform an actual upload of the actual STDTEMPLATE\_2007.XML file again to place the template on a specific attachment server.

---

## Microsoft Word Templates and Document Generation and Preview

In creating a document, the system uses elements from a Microsoft Word template to apply formatting to the document. To create the document, the system uses an application engine to expand all elements defined for the document configurator. The system assembles XML from each expanded section, rule, or clause in the PeopleSoft database into a Microsoft Word XML Document along with formatting from the Microsoft Word template.

To generate a preview version for a clause, section, or document configurator, and to generate an authored document, the system:

1. Extracts Microsoft Word template information (fonts, lists, styles, and document properties) from the Microsoft Word template.
2. Extracts the table of contents and headers and footers from the Microsoft Word template for configurator previews or document generation.
3. Explodes the clause and section content based on the configurator and any rules within it for document generation.
4. Creates a Microsoft Word document by assembling each XML version of PeopleSoft document configurator content and simultaneously applies the appropriate paragraph styles that you predefine using the Document Format and Options page.

## Formatting Application

When you preview a document, the system uses a Microsoft Word default template file to generate a Microsoft Word document containing the content. You define the default template name on the Document Format and Options page. The default template file must contain a set of paragraph styles required for the preview and generate document function. You also define the paragraph styles for use on the Document Format and Options page. The sample word template delivered by PeopleSoft contains Microsoft Word paragraph styles and outline numbering that the PeopleSoft sample database uses.

When you click the **Preview Document** button for a clause or section, the system extracts the stored XML for each of the document objects stored with the database. During the preview of a clause or section, the system generates text based on the appropriate default Microsoft Word template paragraph style at the SetID level stored in the database. The system uses default paragraph styles during document previews unless you have used clause or section specific (override) paragraph styles or numbering. In this case, the system attempts to keep your override formatting for the specific clause or section. The Overriding Styles section later in this document discusses this concept further.

When you preview a document configurator, the system uses the Microsoft Word template that you specify on the document configurator to apply paragraph styles specific to the configurator.

The **Create Document** button initiates the document generation process. You specify the document configurator as part of the generation process. The configurator contains the Microsoft Word template. The generation process for creating the .XML file is similar to the preview, except during the expansion of the document configurator, the Supplier Contract Management system overrides the numbering and outline level formatting of the document based on the structure of the configurator.

Suppose the configurator has a structure consisting of a section and a clause and the section has two clauses. The standard numbering formatting is set to start with **1** for the first level and **1.a** for the second level. The document generation expansion process numbers the section text title as **1**, without indentation and indents each of the clauses in the section. The system numbers each clause in the section as **1.a** and **1.b**. The last clause is also at level one in the document configurator and the system numbers it as **2** and does not indent it.

---

**Note:** Typically, you should not edit a document after its generation to change its standard numbering and outline position. You should make these types of changes in the default Microsoft Word template that is stored in the PeopleSoft system. This maintains document generation consistency if you apply the change to all documents that are generated from that configurator.

---

**Note:** Setting up and using formats between PeopleSoft and Microsoft Word requires a working knowledge of formats and styles and how they effect the appearance and use of documents. You should have a complete understanding of Microsoft Word paragraph styles and formatting prior to creating the clause library. For additional information about Microsoft Word styles and formatting, see the Microsoft web site. For example:

—<http://office.microsoft.com/en-us/word-help/style-basics-in-word-HA102647012.aspx?CTT=1>

---

## Style Planning

Planning how you use Microsoft Word styles in the document creation process is an important task when setting up the Supplier Contract Management application. Microsoft Word styles change the way the that you view and print a document. You should consider styles when you define these functions:

- Clause and section previews.

This function enables you to view the document content before you generate the document. The Preview function is available for clauses and sections and uses the Microsoft Word template name defined as a default value on the Document Format and Options page. Microsoft Word styles for previewing documents are simple paragraph styles for clauses and include:

- Numbered title and bodies.
- Unnumbered titles and bodies.
- Numbered bodies.

- Document generation.

This function uses a Microsoft Word template to create the complete Microsoft Word XML Document through a document configurator. You define the Microsoft Word template on the Document Configuration Definition page. The Microsoft Word style for document generation might require additional formatting, such as headers, footers, and table of contents.

Multiple Microsoft Word templates might also be required to support the document generation process. Each template should have all of the styles that are in the Microsoft Word template that you use to preview documents.

For example, a simple form contract for renting dormitories at a university might not require a table of contents; where as, contracts for sporting goods at the same university might require a table of contents. In this example, you could create and upload two Microsoft Word templates into the

PeopleSoft system. You can then create two document configurators, each referencing a different Microsoft Word template.

## Style Application

When possible, ensure that the text you enter into a clause or section document during editing uses the default style of Normal. The PeopleSoft system converts the Normal style to the appropriate Word paragraph styles and outline numbering as defined in the Microsoft Word template and specified on the Document Format and Options page. Using Normal text when possible enables you to better use the clause in a variety of configurators and have the system determine which styles, such as numbering and indentation, to apply for that configurator based on its associated Microsoft Word template.

If you choose not to use the Normal style and instead specify specific styles in the clause or section content, it has an override affect on the generated document. This is described in the [Overriding Styles](#) topic.

---

**Note:** The content position in the document configurator manages the numbering and indentation (outline level) during document generation in the PeopleSoft system. However, the paragraph style and any indentation of the outline numbering controls the numbering scheme and indentation of content in the Microsoft Word XML Document that the system generates.

---

**Warning!** Use the Normal style when possible in clauses and sections. When you apply a specific style name in a clause or section, even if it is one of those defined in the standard template, the system uses the attributes of those styles defined in the clause versus those defined in the template. This makes it more difficult to keep content in the library consistent over time as you make changes in the templates.

---

## Microsoft Word Paragraph Styles and Outline Numbering in Document Generation

Microsoft Word paragraph styles combined with outline numbering determine the default formatting and numbering scheme for content included in a document configurator. Using paragraph styles provides consistent default formatting and numbering for all content that you select to include in a generated document.

In the Microsoft Word template, you must define all the paragraph styles that the system can use as default document formatting and all paragraph styles that you might use to override during the editing of a clause or section. PeopleSoft provides sample paragraph styles in the STDTEMPLATE\_2007.XML template that demonstrate the use of styles. To access, review, and update styles:

1. Access the Define Document Templates and Styles page.
2. Open the STDTEMPLATE\_2007.XML template by clicking the **View** button.

The system opens the Microsoft Word document.

3. View the styles in Microsoft Word.

For example, select **Styles** from the **Home** tab.

The Styles pane appears containing Microsoft Word and PeopleSoft paragraph styles (those with a prefix of PS). When you move the mouse pointer over a PeopleSoft style, and right-click the mouse, a list of values appears with options for maintaining the style.

---

**Note:** Always refer to Microsoft Help for specific documentation and instructions that pertain to Microsoft products.

---

## Related Links

[Setting Up Document Configurators](#)

## Overriding Styles

While generally not recommended, you can override default paragraph styles that the PeopleSoft system applies based on the styles defined on the Document Format and Options page. You can select another predefined clause or section specific paragraph style or numbering format as you edit a clause or section in a Microsoft Word document. For example, if you want to add bullets in a clause, you must select a paragraph style that has a bulleted list associated with it in the Microsoft Word template. Then, you apply the new paragraph style to the specific area of the clause content. This override feature can be useful when you have more complex clauses, with specific additional numbering specified within the clause or section that are needed when the basic numbering and outline levels defined for a configurator and Microsoft Word template paragraph style are not sufficient.

When you use an override style that is not defined in the Microsoft Word template, the system saves the style and content in an XML content in the PeopleSoft database. The system uses the new style for preview and document generation processing rather than the paragraph style defined on the Document Format and Options page.

---

**Warning!** Using styles that are not defined in the Microsoft Word template can result in a large file size for a clause or section and may exceed the PeopleSoft database long-field size storage capability. This is especially true when you are using International Business Machines DB2 and DB2 Unicode databases. To avoid this issue, use the normal style in the clause or section content when possible.

---

---

**Note:** Always use the **Preview Document** button to view clause and section formats. The preview mode processes clauses similar to how the system generates a document. The preview process enables the system to expose formatting issues before you generate the document. When previewing a document, you can evaluate which styles were applied during the process. This helps you identify and resolve any formatting issues.

---

## When to Add Styles to Templates

You should add new Microsoft Word styles to the default Microsoft Word template in the system or to Microsoft Word templates used by the document configurator when:

1. You use the new style to create content.

You can add a new style to the default Microsoft Word template or to a document configurator Microsoft Word template to ensure that the Microsoft Word style is available for use during document generation and if needed for overriding during the editing process of a clause or section. For example, you can make a new style in a template available during clause maintenance that can be used to override a standard style. Then when authors are editing the clause or section, they can select the style in Microsoft Word.

2. An organization has established document formatting standards.

An organization can define a set of formatting standards for document. You can add the resulting Microsoft Word styles to the Microsoft Word template. Then, through training, authors of generated documents can use the styles correctly. You should also consider the document configurator structure as part of a style standardization project.

---

**Note:** Only administrators familiar with Microsoft Word and the Supplier Contract Management system should make style and template changes.

---

## Steps for Adding Styles to Templates

To locate and add a new Microsoft Word style to a Microsoft Word template:

1. From within PeopleSoft, open the Document Template and Style page and select the **View** button for the default Microsoft Word template.

Download the file to the Microsoft Windows file system.

2. Edit the file.

The document might be blank since Microsoft Word template files do not generally contain content. One exception could be a table of contents formatting tag.

3. Use the official Microsoft Word documentation to add a new style, and save the resulting file in a .xml format.
4. Open the Define Document Template and Styles page in the Supplier Contract Management application.
5. Click the **Upload a file** link.

The system prompts you to browse for the file within the file system. When you find the file, click the **Upload** button.

If you are updating the default Microsoft Word template, the name is the same as the existing Microsoft Word template in the system. The system prompts you that the row exists and the template is in use. Since you are updating the template, you should click *Yes*.

### Related Links

[Setting Up Document Templates and Styles](#)

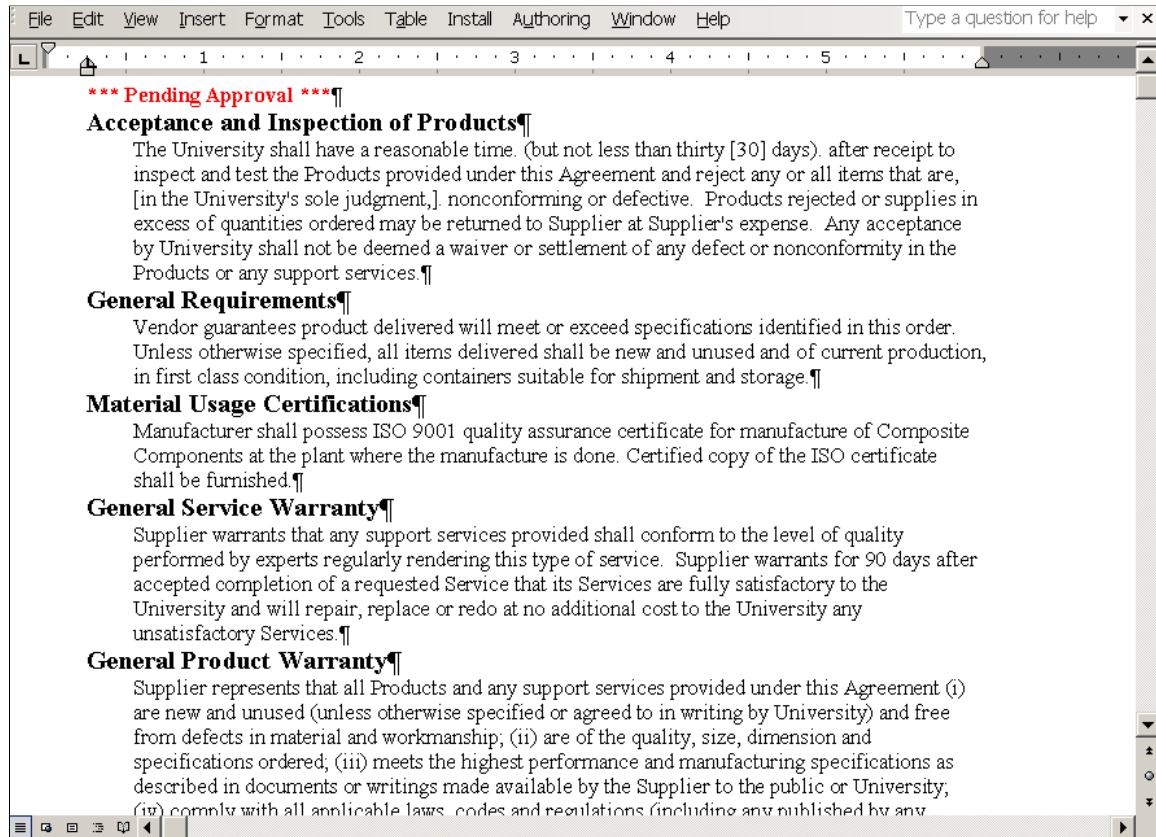
## Style Examples

These topics provide several examples of how you can format documents and displays sample formatting in Microsoft Word.

### Unnumbered Clauses

To remove numbering from clause, ensure that the Numbered Clause check box on the Clause Definition page is clear. This example illustrates unnumbered clauses that have been included in a section that is going through approval:

This screen shot illustrates an example of unnumbered clauses

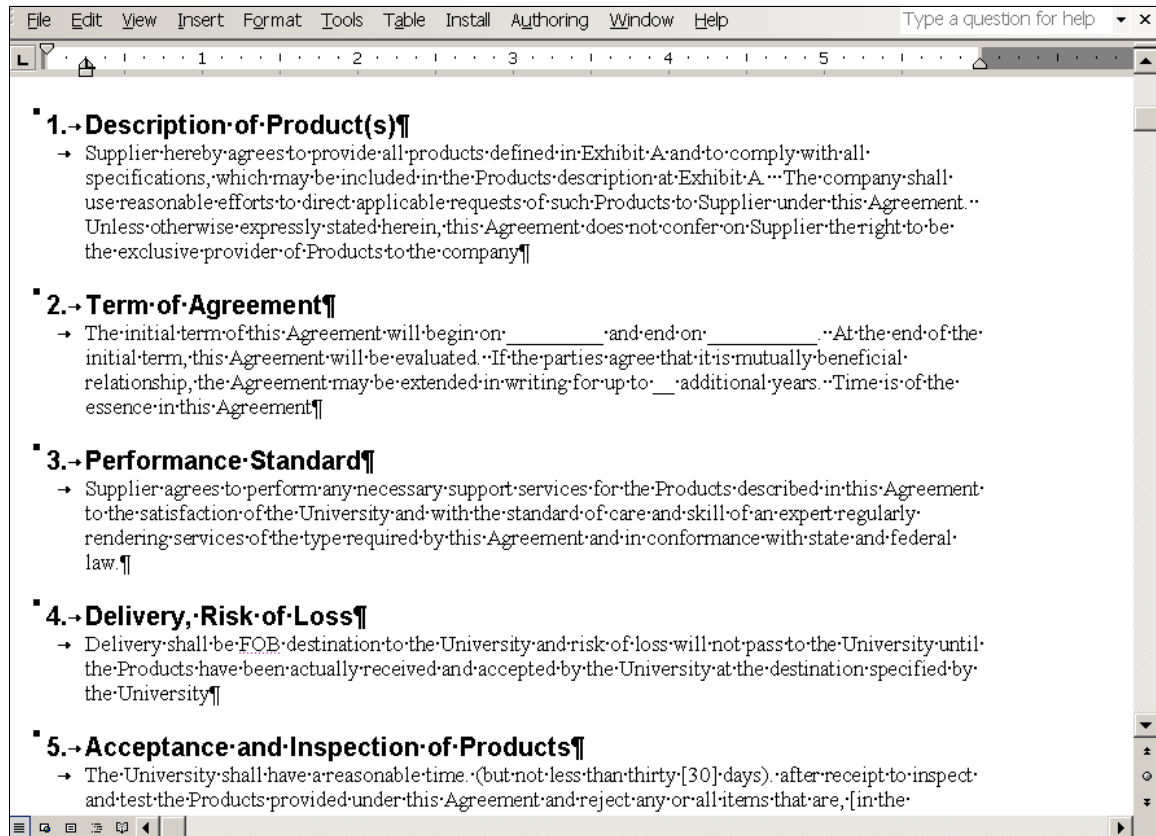


The default Microsoft Word style used for the preview document function is controlled by the information entered in the **Document Text Styles** grid on the Document Format and Options page. In this example, the content includes five clauses incorporated into a section. Each of the clauses has an unnumbered title and a body under the unnumbered title for an unnumbered clause.

The default value for the Microsoft Word style is the value you enter in the **Unnumbered Title Style** field. You enter the paragraph style for the body in the Microsoft Word style for the **Body Style under Unnumbered Title** field. Supplier Contract Management provides sample Microsoft Word styles for the *PSUnnumHeading* and *PSBody2* values.

## Numbered Clauses

This screen shot illustrates an example of a numbered clause document:

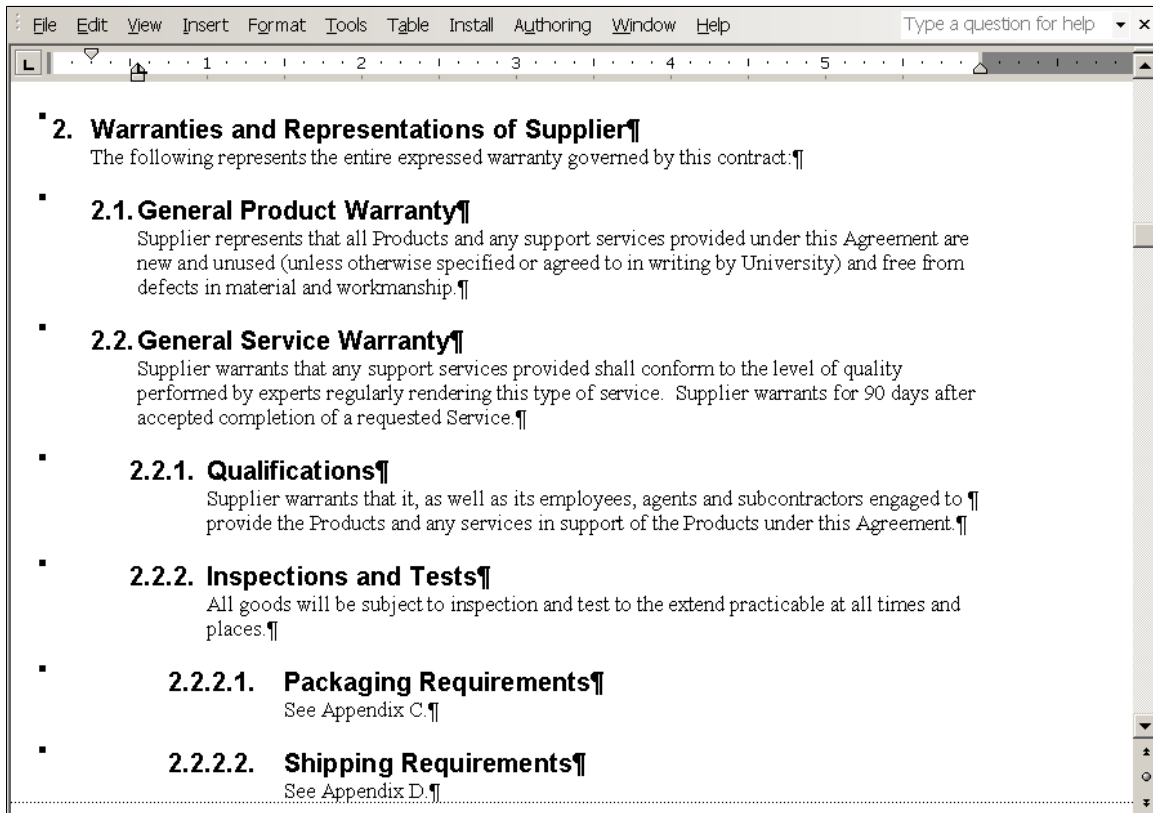


The default value the system uses for the Microsoft Word style to preview documents is controlled by the information entered in the **Document Text Styles** grid on the Document Format and Options page. In this example, the content includes five clauses. Each clause has a numbered title and a body under the numbered title for a numbered clause. The default value for the Microsoft Word style is the value you enter in the **Numbered Title Style** field. You enter the paragraph style for the body in the Microsoft Word style for the **Body Style under Numbered Title** field. Supplier Contract Management provides sample Microsoft Word styles for the *PSNumHeading* and *PSBody1* values.



## Indented Numbered Content

This screen shot illustrates an example of indented numbered content in a generated document:



The document configurator controls the numbering and how the content is arranged with respect to the left margin for the generated document. In this example, the **Outline Position** column in the **Content Elements** grid sets the numbering for each of the content. The section **Warranties and Representations of Supplier**, has an outline position value of 2 and the section contains a clause, **General Product Warranty**, and another section, **General Service Warranty**. The numbering of content within the first section has an outline position value starting with 2.1. The indentation of each content element follows the outline position value as well.

The Microsoft Word style controls the numbering format. The **Numbered Section** or the **Numbered Clause** check boxes in each of the content elements controls the numbering in the document.

If the check box for the parent content element is selected, the system also numbers any content element within the parent. In this example, the section, **General Service Warranty**, would have the numbering checked, the clause, **Qualification**, would be numbered even if the **Numbered Clause** check box was not selected.

## Character Limitations

Certain special multibyte characters that you enter, paste, or check in to document authoring PeopleSoft pages can cause translation problems in the system. These problems occur on certain system platforms that are not using a Unicode Standard database and are due to internal storage limitations of the database and requirements of the multibyte character.

The characters appear normal when you add them to a text field; however, when the system saves the page, the character might display as another font, such as a wing ding font, depending on which platform that you are using that is not using the Unicode Standard database.

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**Note:** If you are not using an Unicode Standard database, you should refrain from using special characters including:

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- " and ": Double quotes with curls.
- ' : Single quotes with curls.
- – : Dashes and hyphens.
- (TM): Trademark enclosed in parenthesis; however, superscript trademarks appear normal.
- 1/2, 1/4: Fractions entered as subscripts.

When the system detects these multibyte characters from a database that is not a Unicode Standard database, it attempts to replace the value to a reasonable alternative that it can store. When you use any of these characters or create a custom character, you should use the Preview feature for clauses and sections to check the appearance of the characters. This is how they will appear in a generated document.

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**Note:** You must manually review and replace the characters before you use a document configurator to generate the document when having multibyte character issues.

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## Protected Areas

When the system initially generates a Microsoft Word document for a clause or section, it is wrapped in a content control, which should not and cannot be deleted. When you edit a clause or section, you can only edit the content. If you delete or alter the content controls, using Microsoft Word, you risk not being able to map the document elements back to the database record when you check in the content.

When the system generates the actual document, an installation option controls whether the system is to protect any bind-resolved values in the document. Each resolved bind is then protected by setting a content control property to lock the content so that it can be modified.

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## Outline Numbering

As you assemble a document using the document configurator, the system inserts a value for the outline level based on the position of the content in the document configurator. The system assigns this number for each clause as it generates the document. For example, the number 1.1.3 might correspond to outline level three. Then, depending on how you defined the outline level for the paragraph styles in the Microsoft Word template, the indentation within Microsoft Word could affect the width of a tab setting at that outline level. So, a tab at level one could appear as one space, but at level three, might appear as five spaces. This results in an adverse affect in document formatting.

To reduce the possibility of spacing problems in the Microsoft Word document, you should ensure that you can view all formatting marks in the document.

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## Spelling and Grammar Checks in Microsoft Word

Spelling and grammar issues should be resolved before exiting Microsoft Word and checking in the document. The special character Microsoft Word adds during the spelling and grammar check can cause issues during check in for clauses and sections for the XML related to bind variable names. Since the characters that are used to define a bind variable name can easily result in a spell check in Microsoft Word, any automatic spell checking and grammar checking should be disabled when editing clauses and sections.

To exclude spelling and grammar checking for Microsoft Word documents, make sure you select the appropriate options in Microsoft Word. For example, you might have to deselect the **Do not check spelling or grammar** check box.

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**Note:** See Microsoft documentation for information that pertains to Microsoft features and functionality.

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## Document Comparison Considerations

The **Compare Document** function on the Document Management page enables the system to compare the current document with a prior, re-created, or refreshed version of the document. This function uses the Compare Document function in Microsoft Word as a background process, to create a temporary file that you can use to see the differences. You cannot check in this file to PeopleSoft because it may not contain the correct XML structure after a compare is complete.

Any document comparisons you perform with authored documents must have the protection password removed prior to running the comparison process.

### Related Links

[Setting Up Document Comparison and Rendering](#)

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## Document Preview and Edit Differences

You can preview clauses, sections, and document configurators. Previewing document elements enables you to review the Microsoft Word version of the document element as you build it. The preview process enables the system to expose formatting issues before you generate the document and provides status information about the element.

Microsoft Word documents you generate using the **Preview Document** button are intended to be read-only documents. You must use the **Edit Document** button to check out elements, make changes, and check in the elements. You can cancel the document check out. Using the Preview feature, the system does not explode repeat sections and rules because of dependence of transactional contract data. The system also assumes that rules are always true when you are previewing an element.

Another feature for viewing documents is the **View Document** button available on the Document Management page. This feature enables you to view a document, but does not enable you to check in the document. The actual Microsoft Word file that you view using this feature is not a read-only document.

## Adding a Table of Contents to a Document

This example illustrates a document table of contents:

This example illustrates the fields and controls on the Microsoft Word table of contents example. You can find definitions for the fields and controls later on this page.

AGREEMENT FOR PRODUCT PURCHASE		
BETWEEN		
THE REGENTS OF THE UNIVERSITY OF PLEASANTON		
AND		
CAMPER'S WAREHOUSE		
(CONTRACT NUMBER: 000000000000000000000004)		
¶		
This AGREEMENT FOR PRODUCT PURCHASE is made between THE REGENTS OF THE UNIVERSITY OF PLEASANTON (University) a Pleasanton Constitutional Corporation, Pleasanton, and CAMPER'S WAREHOUSE (Supplier). ¶		
¶		
1.	→ Description of Product(s).....→	1 ¶
2.	→ Term of Agreement.....→	2 ¶
3.	→ Performance Standard.....→	2 ¶
4.	→ Delivery, Risk of Loss.....→	2 ¶
5.	→ Acceptance and Inspection of Products.....→	2 ¶
6.	→ Warranties and Representations of Supplier.....→	2 ¶
6.1.	→ General Product Warranty.....→	2 ¶
6.2.	→ General Service Warranty.....→	3 ¶
6.3.	→ Qualifications.....→	3 ¶
6.4.	→ Conflict of Interest.....→	3 ¶
7.	→ Contract Agreement: Metric Agreement: On-time Quantity Performance (AG-M_ONTIME_QTY).....→	3 ¶
7.1.	→ General Requirements.....→	3 ¶
8.	→ Contract Agreement: Metric Agreement: PO/Receipt Qty Performance (AG-M_PO/RCPT_QTY).....→	3 ¶
8.1.	→ General Requirements.....→	3 ¶
9.	→ Contract Agreement: Metric Agreement: Quality Performance (AG-M_QUALITY).....→	3 ¶
9.1.	→ Inspections and Tests.....→	3 ¶
9.2.	→ General Requirements.....→	4 ¶
10.	→ Contract Agreement: Certification of Material Usage (AG_CERTIFICATION).....→	4 ¶
10.1.	→ Material Usage Certifications.....→	4 ¶
11.	→ Contract Agreement: Product Re-labeling (AG_LABEL).....→	4 ¶
11.1.	→ General Requirements.....→	4 ¶
11.2.	→ Inspections and Tests.....→	4 ¶
12.	→ Termination.....→	4 ¶
12.1.	→ Termination for Breach.....→	4 ¶
12.2.	→ Immediate Termination.....→	4 ¶

To add a table of contents to a document:

1. Add the Microsoft Word Table of Contents field code to the Microsoft Word template.

The Microsoft Word template must contain the Microsoft Word Table of Content field code. You must edit the template to include this field code and upload the template into the system using the Define Document Templates and Styles page.

See Microsoft Word Help for information about adding a table of contents.

2. Select the **Include Table of Contents If Available** check box on the Document Configurator Definition page.

- After you generate the document, select and update the field for the Microsoft Word Table of Contents field code in the document.

This example displays a document configurator contents similar to the configurator that produced the previous Microsoft Word table of contents example:

This example illustrates the fields and controls on the Example of document configurator content elements. You can find definitions for the fields and controls later on this page.

Content Elements				Customize	Find	First	1-19 of 19	Last
Outline Position	Content Type	Content ID	Content Description					
1	Section	S_INTRO01	<a href="#">Procurement Contract Introduction Section</a>		+	+	-	X
2	Clause	CL_PRODESC01	<a href="#">Product Description</a>	→	+	+	-	X
3	Clause	CL_TERM01	<a href="#">Term of Contract</a>	→	+	+	-	X
4	Clause	CL_PERFMSTD01	<a href="#">Performance Std Clause</a>	i	+	+	-	X
5	Clause	CL_DIRISLOS01	<a href="#">Delivery, Risk and Loss Clause</a>	→	+	+	-	X
6	Rule	INSPECTION_REQUIRED	<a href="#">Inspection Required</a>	→	+	+	-	X
7	Rule	PRODUCT_WARRANTY	<a href="#">Product Warranty Required</a>	i	+	+	-	X
8	Section	S_HDR_AGREEMENTS	<a href="#">Contract Header Level Agreements (Repeating)</a>	i	+	+	-	X
8.1	Section	SLA-HDR-PLACEHOLDER	SLA Placeholder for Header SLA Clauses					
9	Section	S_TERMINATE01	<a href="#">Standard Termination Section</a>	i	+	+	-	X
9.1	Section	SLA-HDR-PLACEHOLDER	Terminate for Breach					
9.2	Section	S_TERMINATE01	Immediate Termination					
9.1	Clause	CL_TERMINATE01	Include Terminate Clause if only non-custom products exist					
9.2	Clause	CL_TERMINATE02	Include Terminate Clause if custom products exist					
9.3	Rule	NOCUSTOMPRODUCTS	<a href="#">Products and Services</a>	→	+	+	-	X

## Troubleshooting Integration Issues

These topics provide a list of issues for identifying and resolving formatting issues for clause librarians and interested parties. The issues are ones that you might encounter when creating clause libraries, especially if you create libraries by cutting and pasting existing Microsoft Word documents into the library components.

This table describes possible solutions to formatting issues:

Category	Problem	Possible Cause	Possible Resolution
Clause library formats and previews	Upon checking out a document for editing, you notice that Microsoft Word menus or menu items are missing.	The Microsoft Windows registry may be set up so that when you use file types of .xml, the system uses the Microsoft Word browser plugin	Contact the system administrator to configure Microsoft Windows to launch Microsoft Word for .xml file format extensions. For information about customizing the tool bar, use Microsoft Word Help.

<b>Category</b>	<b>Problem</b>	<b>Possible Cause</b>	<b>Possible Resolution</b>
Clause library formats and previews	Column alignment displays correctly when editing a clause; however, when previewing the clause, columns are not aligned. For example, underlines on a signature page might not be aligned.	Hidden tabs that the system uses with alignments can cause problems when the clause is previewed and assembled with other content. This is due to the outline numbering level at which the clause might appear when previewed with the configurator, or styles applied during preview. For example, the tab symbol can cause different levels of indentation based on the outline level.	You can use a hidden table in Microsoft Word to fix the alignment of column-orientated information instead of using tabs. You can also use Microsoft Word tables in the document for content that contains tabs.

<b>Category</b>	<b>Problem</b>	<b>Possible Cause</b>	<b>Possible Resolution</b>
Clause library formats and previews	When editing a clause, it appears correctly, but when previewing the document, there are occasional special characters, such as upside down question marks, small squares, or symbol translation for bullets.	Certain characters in Microsoft Word require multibyte data storage due to the internal representation of the character. These can include smart quotes, dashes, a variety of bullet formats, and others. The PeopleSoft system attempts to clear and replace these special characters with nonmultibyte representations when the database is not configured for multibyte storage. However, a substitution may not always be available.	When it's not possible to run in a multibyte, Unicode Standard environment, you might need to remove special characters when editing the clause document and substitute a different, more common nonmultibyte character representation. For example, you might need to retype quotes as plain double quotes in the Microsoft Word document instead of using smart quotes. See <a href="#">Character Limitations</a> .

<b>Category</b>	<b>Problem</b>	<b>Possible Cause</b>	<b>Possible Resolution</b>
Clause library formats and previews	When previewing or editing a clause or section, the Microsoft Word formatting is lost and characters are corrupt after cutting and pasting information into the PeopleSoft system from a Microsoft Word document.	A large amount of text has been cut from a Microsoft Word document and pasted into a PeopleSoft system clause or section page.	<p>You should not cut and paste clause and section content from Microsoft Word into PeopleSoft pages, because it does not maintain Microsoft Word rich text attributes. You should only cut and paste plain text into PeopleSoft pages.</p> <p>You can cut and paste from current Microsoft Word files to an empty checked out version of a PeopleSoft clause or section to preserve previous Microsoft Word document formatting.</p>

<b>Category</b>	<b>Problem</b>	<b>Possible Cause</b>	<b>Possible Resolution</b>
Clause library formats and previews	After checking in a Microsoft Word document, the clause body text in the PeopleSoft page plain-text field has incorrect formatting or characters.	This is typically caused by special formatting or characters used in Microsoft Word prior to checking in the document.	Most of the time, the plain-text version of most clauses display in a readable format in the PeopleSoft page clause body. However, it depends on the formatting in the Microsoft Word document. As long as clauses or sections appear correctly on their maintenance pages, there should not be a problem.

<b>Category</b>	<b>Problem</b>	<b>Possible Cause</b>	<b>Possible Resolution</b>
Clause library formats and previews	When previewing a clause, it looks correct, but when you include it in a generated document or preview it from the configurator, the alignment indentation of its content is incorrect.	<p>Possible causes include:</p> <ul style="list-style-type: none"> <li>• If the clause text in Microsoft Word is formatted without special paragraph styles, incorrect alignment can be caused by not setting up the paragraph style outline numbering indentation in the Microsoft Word template correctly.</li> <li>• If you are using custom paragraph styles or direct formatting when directly editing the clause, the preview and generate functions are merging the custom formatting. But, the automatic indentation feature is lost when you use predefined paragraph styles from the Microsoft Word template.</li> </ul>	<p>Possible solutions include:</p> <ul style="list-style-type: none"> <li>• When you preview the clause in the configurator, note the paragraph style applied to the clause in the Microsoft Word document. Then, review the details of that paragraph style's outline numbering and indentation specified for each level, and correct the issues in the Microsoft Word template associated with the configurator.</li> <li>• Remove any custom paragraph styles used directly in clauses, and, if possible, use normal style so that the document generation can apply default paragraph styles to the clause. If you cannot use Normal style, you must indent the information in the clause body definition in Microsoft Word to match the outline position that it would normally align with in a generated document. You need to do this because the system does not use outline numbering and alignment from Microsoft Word templates when you use custom styles with a clause.</li> </ul>



<b>Category</b>	<b>Problem</b>	<b>Possible Cause</b>	<b>Possible Resolution</b>
Research task pane lookups and bind variables in Microsoft Word.	The Research task pane does not return results from the search.	<p>Possible causes include:</p> <ul style="list-style-type: none"> <li>• Messaging between the Microsoft Word client and the PeopleSoft system is not set up correctly.</li> <li>• The local client machine has not been updated with client updates.</li> <li>• The configuration file has incorrect information defined in it for client installation.</li> </ul>	You use files in the setup directory to set up Microsoft Word integration. The setup utility must be run on the workstation for each user who wants to use the Microsoft Word integration with PeopleSoft Supplier Contract Management. See <a href="#">Setting Up PeopleSoft Integration Broker for Microsoft Word</a> .
Research task pane lookups and bind variables in Microsoft Word.	The Research task pane does not insert the clause content into the document after you click the <b>Insert Full Text</b> button.	<p>If a clause is too large to integrate into the Research task pane, the insert can fail. The system issues a warning if there is potential for failure.</p> <p>If a clause contains a large amount of custom formatting and paragraph styles, it can be too large to include in the search. This might be due to XML representation as well as the visible clause text.</p>	Attempt to simplify the custom formatting of the clause or divide it into smaller clauses.

<b>Category</b>	<b>Problem</b>	<b>Possible Cause</b>	<b>Possible Resolution</b>
Research task pane lookups and bind variables in Microsoft Word.	When you type or select valid bind variables from the Research task pane and check in the document, the PeopleSoft system indicates there are validation errors for the bind variable.	<p>The Microsoft Word auto correction and tracking of grammar features highlight errors in documents that may be visible as you type variable names. The variable is highlighted with a red line underneath it.</p> <p>When a field has this underline beneath it, it typically means that extra values are included in the XML value that you will check in. This makes the bind value invalid.</p>	<p>Change the spelling and grammar setting so that it is off. Then, delete and retype the bind variables. Verify that there are not any red underlines for the bind variable. Check in the document again. See <a href="#">Spelling and Grammar Checks in Microsoft Word</a>.</p>

<b>Category</b>	<b>Problem</b>	<b>Possible Cause</b>	<b>Possible Resolution</b>
Research task pane lookups and bind variables in Microsoft Word.	When inserting clauses from the Research task pane, the system includes the clause within the content control of another clause which leaves the clauses nested in the document.	<p>The system inserts clauses based on where you position the cursor in the document. If the cursor is within a content control of another clause, the system inserts the clause within the existing content control.</p> <p>During processing, the system attempts to identify this issue and logs the newly inserted clause as an add activity versus a change activity for the clause.</p>	<p>You can avoid the nested clause affect by performing these steps in the Microsoft Word XML Document:</p> <ol style="list-style-type: none"> <li>1. Place the cursor at the beginning of the first line of the clause below where you want to insert the new clause.</li> </ol> <p>Use the Home key to position the cursor at the beginning of the content control.</p> <ol style="list-style-type: none"> <li>2. Use the Return key to insert a new line above the current line.</li> <li>3. Place the cursor on the new line to insert the new clause from the Research task pane.</li> </ol> <p>You can validate that the clause is inserted correctly by hovering your mouse pointer over the new clause.</p>

<b>Category</b>	<b>Problem</b>	<b>Possible Cause</b>	<b>Possible Resolution</b>
Document generation and editing	The table of contents does not appear when you preview a generated document.	<p>Possible causes include:</p> <ul style="list-style-type: none"> <li>• The <b>Include Table of Content If Available</b> check box was not selected on the Document Configurator Definition page.</li> <li>• The Table of Contents field code was not inserted in the default Microsoft Word template used by the document configurator.</li> <li>• When you open the document file, Microsoft Word does not expand the table of contents.</li> </ul>	<p>Ensure the <b>Include Table of Content If Available</b> is selected on the Document Configurator Definition page and that the Table of Contents field code has been added to the Microsoft Word template. After you generate the document, click the <b>Preview Document</b> button. The Microsoft Word window displays a message at the point when the Table of Contents was inserted in the Microsoft Word template. The messages indicates: <b>Error! No table of contents entries found.</b> To display the table of contents, right click on this message and select <i>Update Field</i>. The system displays the table of contents.</p>

<b>Category</b>	<b>Problem</b>	<b>Possible Cause</b>	<b>Possible Resolution</b>
Document generation and editing	Document headers and footers do not display.	<p>Headers and footers should be added to the Microsoft Word template that the document uses.</p> <p>If the current view in Microsoft Word is set to Normal, the headers and footers might not display.</p>	<p>Add headers and footers to the Microsoft Word template used by the document configurator. After you preview the generated document, set the <b>View</b> menu to <i>Print Layout</i> to view the headers and footers.</p>
Document generation and editing	<p>Change tracking and red lining are not working when a document is checked out from the PeopleSoft system. Or, you cannot enable track changes in Microsoft Word.</p>	<p>The <b>Use Track Changes in Word</b> check box in the <b>Processing Option</b> grid on the Installation Options for Supplier Contract Management is not checked. This check box sets the default value for the Microsoft Word change tracking function.</p>	<p>Select the <b>Use Track Changes in Word</b> check box on the Installation Options page. Set the document protection in Microsoft Word. Click the <b>Tools</b> option on the toolbar, and then select the <b>Unprotect Document</b> menu option. See <a href="#">Protected Areas</a>.</p> <hr/> <p><b>Warning!</b> When you turn off protections, the custom XML tags are no longer protected. Editing the tags can result the system not being able to recognize the content elements in the document.</p> <hr/>

<b>Category</b>	<b>Problem</b>	<b>Possible Cause</b>	<b>Possible Resolution</b>
Document generation and editing	When uploading a file, you cannot locate a file that has been checked out, edited, and saved on a remote file server.	<p>The default location for the Microsoft Windows <b>Save</b> and <b>Save As</b> actions are set from the Save command.</p> <p>The location in which you saved the document is a file server that is not currently available.</p>	<p>Microsoft Windows sets the default save location to the <b>My Documents</b> or <b>Winword</b> folders. You can establish a default location for the documents. Contact an administrator for help in establishing a default file location and resolving issues with remote file servers.</p>

<b>Category</b>	<b>Problem</b>	<b>Possible Cause</b>	<b>Possible Resolution</b>
Document generation and editing	<p>Additional content controls appear in a document that has been opened using the <b>Preview Document</b> button.</p> <p>The content controls appear when the <b>display for hidden text</b> check box has been selected in Microsoft Word, and the content controls appear empty.</p> <p>Additional content controls might also exist for structures such as repeating clauses and sections.</p>	<p>During document generation, the system expands the content in the document configurator. During this expansion, it evaluates rules.</p> <p>If a rule evaluates true, the system adds the rule object and referenced content in the rule to the document.</p> <p>If the rule evaluates false, the system still adds the rule element to the document.</p> <p>Similarly, any repeat elements or alternates that are added to the document, the system inserts these content controls as placeholders. The objects do not have any content associated with them and only have attributes.</p>	<p>Authors should be aware of these content controls in the document and understand that these are only placeholders for the rules, and repeat or alternate clauses. In general, these content controls do not cause document issues and should not be edited or deleted. The document appears correctly in the Microsoft Word <b>Print Layout</b> view.</p>

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## Editing and Maintaining Documents Using Content Controls

These topics are discussed:

- [Inserting Ad Hoc Text](#).
- [Tagging Content with Content Controls](#).
- [Adding a Custom Button](#).

### Inserting Ad Hoc Text

You can insert text between clause and section content controls. To do this:

1. Click the tab on the Content Control (clause) after the point in which you want to insert the text.
2. Click the scroll-up arrow.

If you want to insert text and there are no blank lines in between content controls, then you need to position your cursor at the beginning, or end, of the content control and use arrow key to move outside of the control.

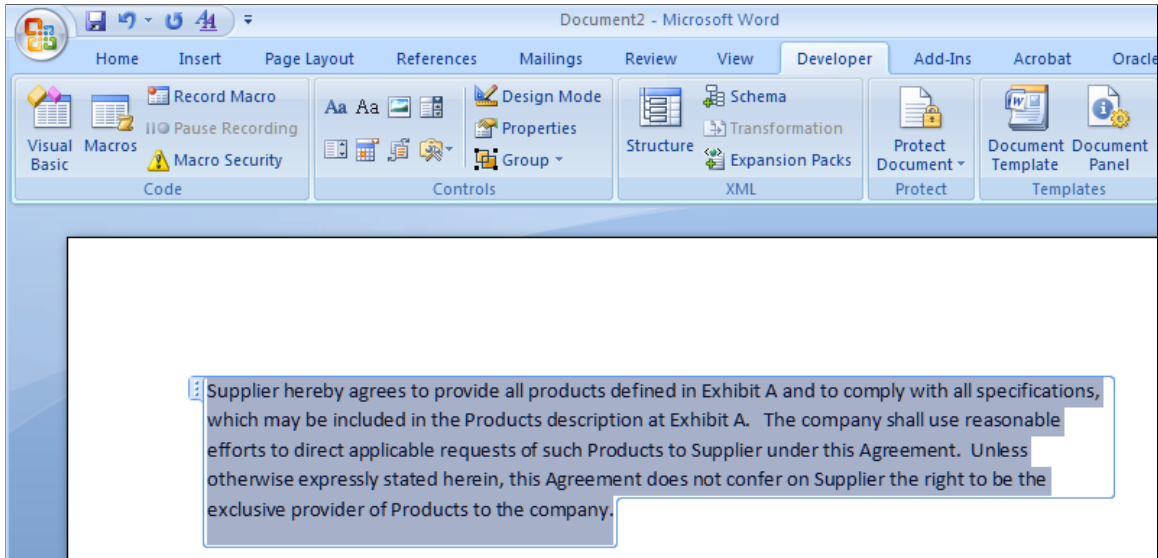
### Tagging Content with Content Controls

To tag content using content controls within a new Microsoft Word document:

1. Highlight the clause text.
2. Select the Developer tab and click on the Rich Text content control 'Aa' icon.

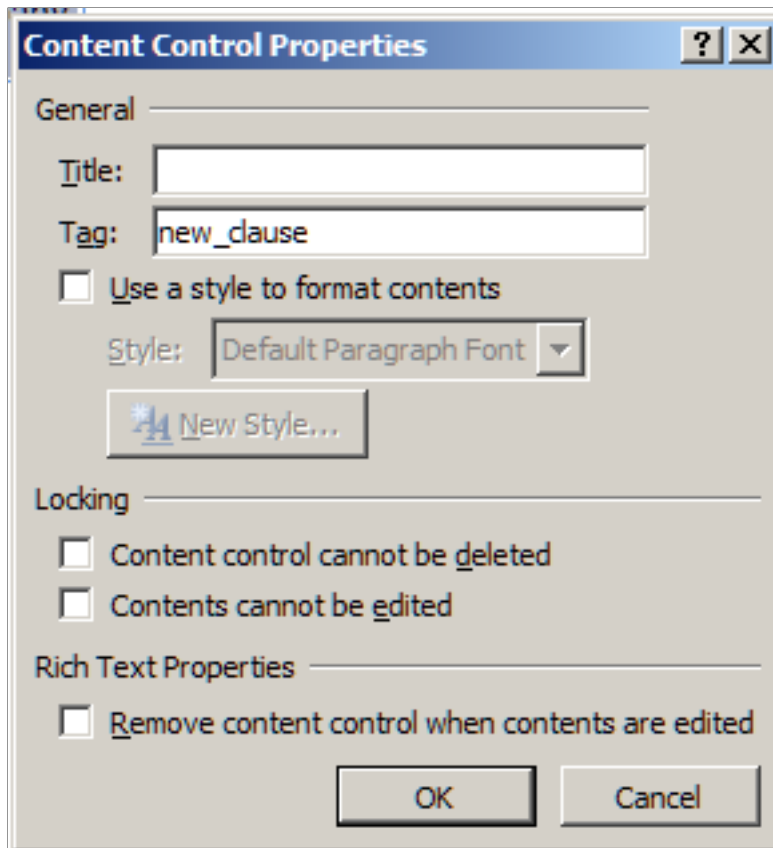
The highlighted text is wrapped in a box:

This example illustrates the fields and controls on the Rich Text Content. You can find definitions for the fields and controls later on this page.



3. From the Developer tab, click on the Properties option.
4. In the **Tag** field, enter *new\_clause*.

This example illustrates the fields and controls on the Content Control Properties window from the Developer tab. You can find definitions for the fields and controls later on this page.



5. Continue step three and four for *id*, *title*, *full\_text*, and *by\_reference*.

If you only add a content control using the *new\_clause* tag to a clause with no other content controls within the *new\_clause* tag, then all text in the content control will be imported as full text.

If you have many clauses to import, you can streamline this process by adding custom buttons to the Quick Access Tool bar in Word. This enables you to highlight various sections of a clause and use these buttons to tag clauses with a single click for each property: *new\_clause*, *id*, *title*, *full\_text*, and *by\_reference*.

See [Understanding the Object Import and Creation Process](#).

## Adding a Custom Button

Using custom buttons enables you to streamline the tagging process for large documents. Adding buttons that insert a rich text Content Control and set properties for the selected control can be performed on a two-step process:

1. Record the macro.
2. Add the recorded macro to the Quick Access Toolbar

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**Note:** This information is suggested based on Microsoft Word functionality and is not controlled by Oracle functionality.

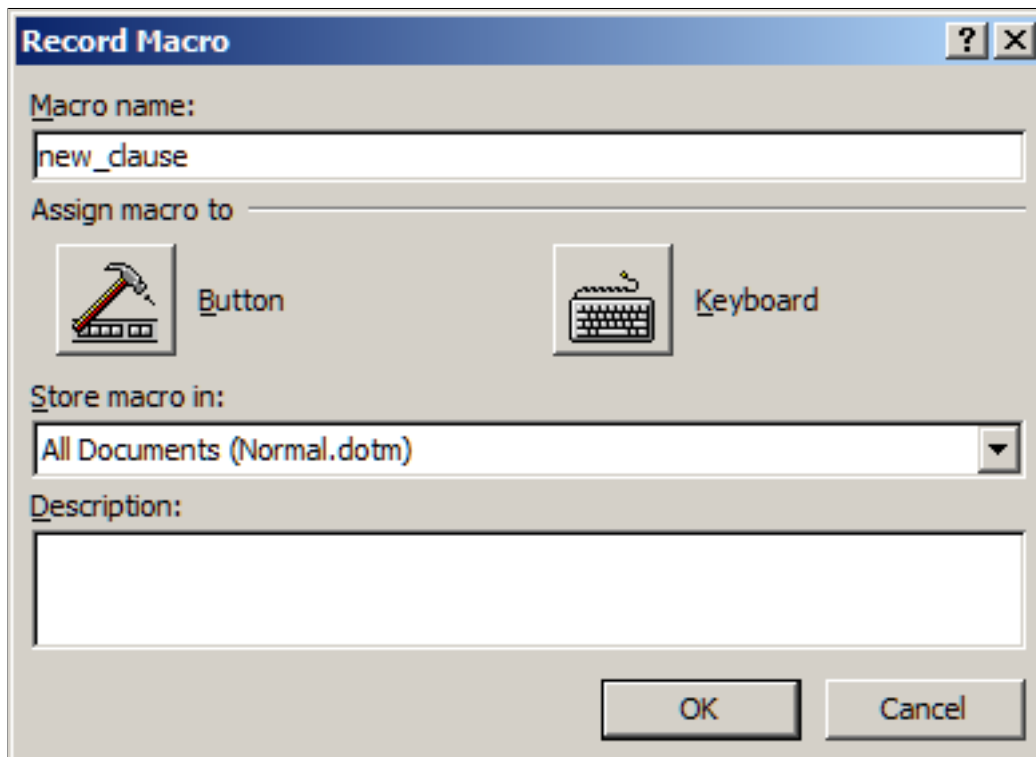
---

## Recording the Macro

To record the macro:

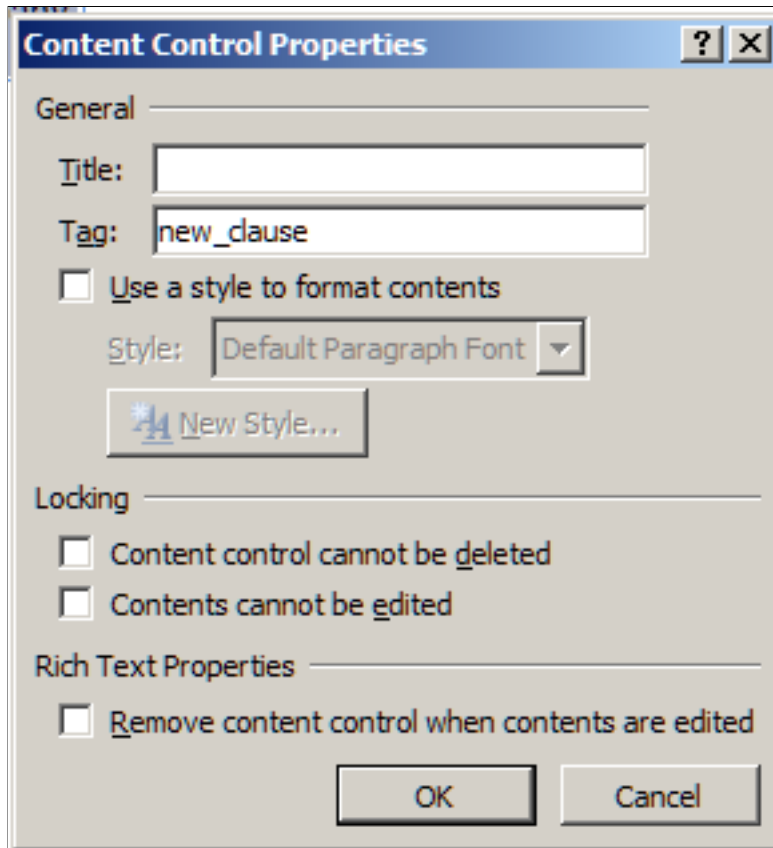
1. Open Word and click on the Developer tab.
2. In the Code group box, click the **Record Macro** button.
3. In the Record Macro window, enter *new\_clause* in the **Macro name** field.
4. In the **Store macro in** field, select *All Documents (Normal.dotm)*.

This example illustrates the fields and controls on the Record Macro window. You can find definitions for the fields and controls later on this page.



5. Click the OK button to begin recording.
6. In the Controls group box, click the *Rich Text (Aa)* icon
7. In the Controls group box, click the **Properties** icon.
8. In the Content Control Properties window, enter *new\_clause* in the **Tag** field.

This example illustrates the fields and controls on the Content Control Properties window when recording a macro. You can find definitions for the fields and controls later on this page.



9. On the Content Control Properties window, click the OK button.
10. In the Code group box, click on the *Stop Recording* button.

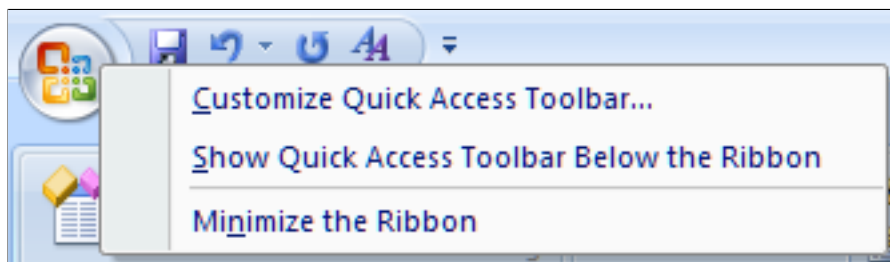
### Adding a Recorded Macro to the Quick Access Toolbar

The Quick Access Toolbar is located in the upper-left portion of the Word window. It is a customizable toolbar where you can place buttons for frequently used commands or macros.

To add a recorded macro to the Quick Access Toolbar:

1. Right-click on the Quick Access toolbar and select *Customize Quick Access Toolbar*.

This example illustrates the fields and controls on the Quick Access Toolbar - right click. You can find definitions for the fields and controls later on this page.

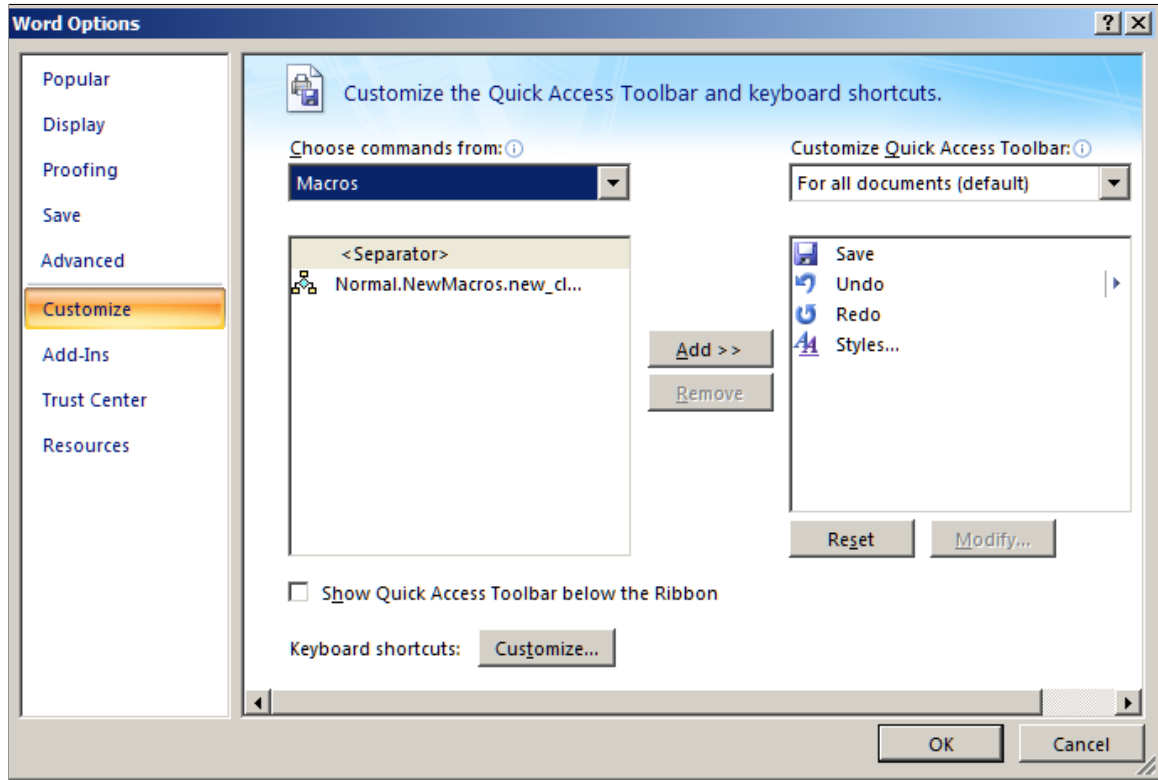




This opens the Word Options window.

- From the left pane, click the **Choose commands from** drop-down and select *Macros*.

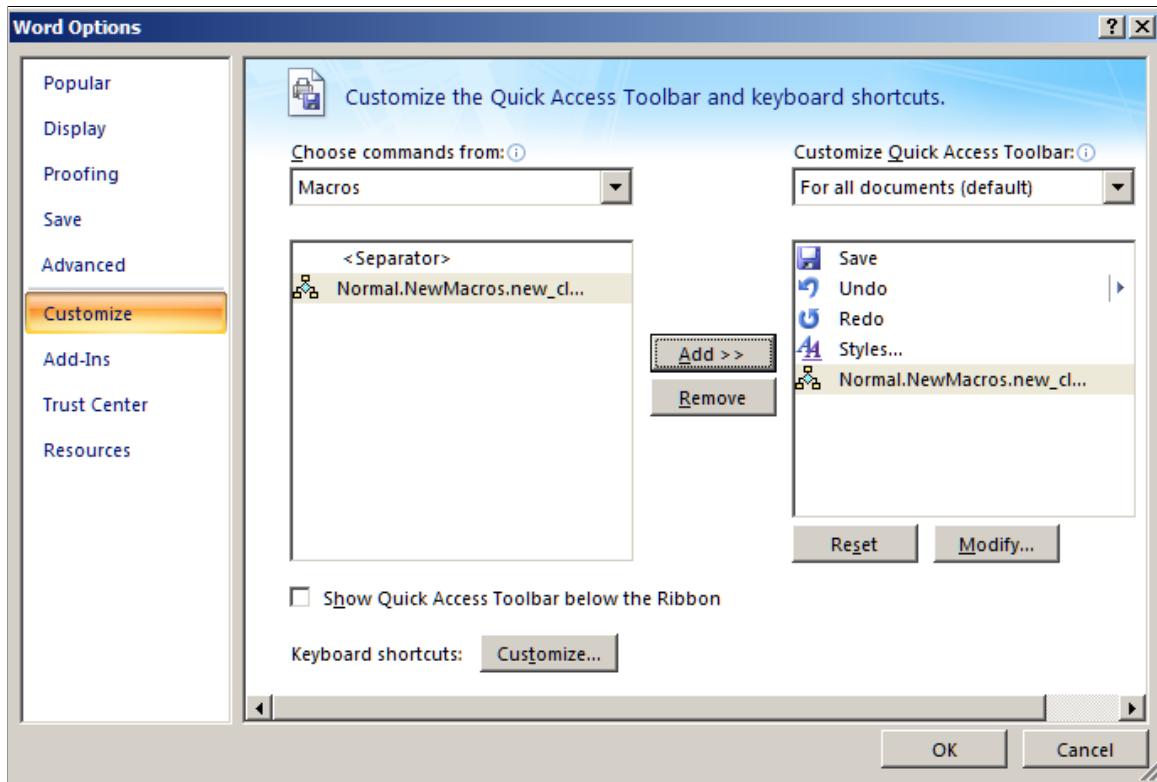
This example illustrates the fields and controls on the Word Options window - Macros. You can find definitions for the fields and controls later on this page.



- From the left pane, click one time on the macro name *Normal.NewMacros.new\_clause*.
- In the center of the two panes, click the **Add >>** button.

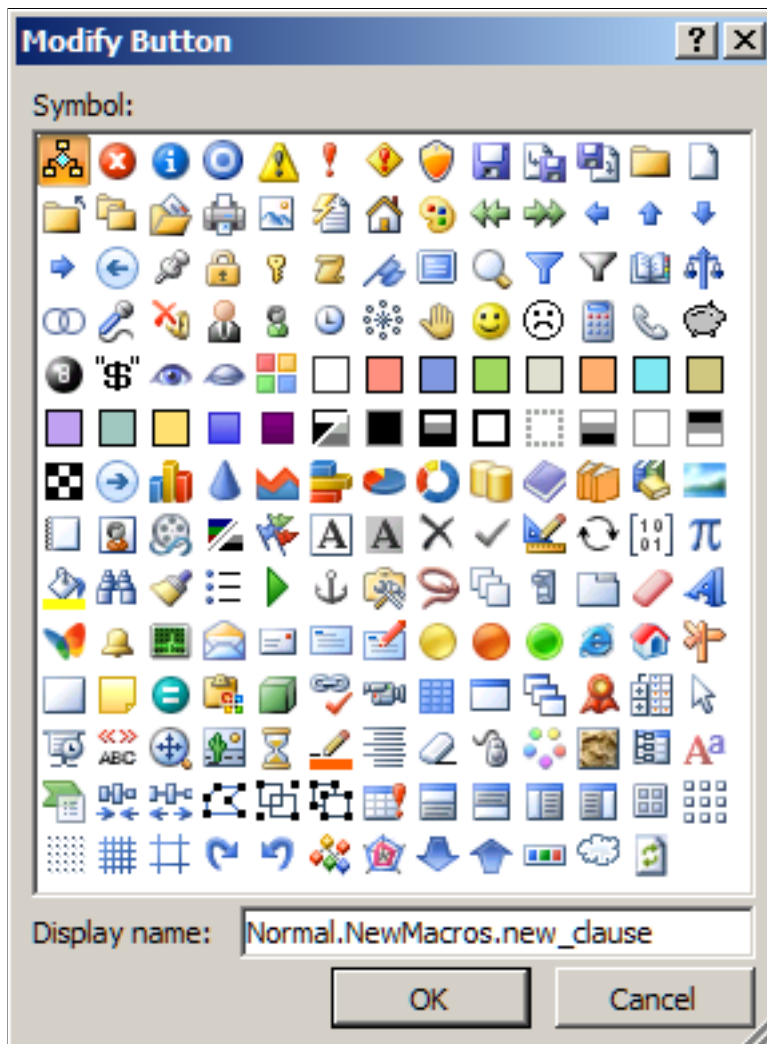
This moves the *Normal.NewMacros.new\_clause* to the right pane.

This example illustrates the fields and controls on the Word Options window - Add. You can find definitions for the fields and controls later on this page.



5. Below the right pane, click the **Modify** button to apply an icon of your choice to this button.

This example illustrates the fields and controls on the Modify Button window. You can find definitions for the fields and controls later on this page.



6. From the Modify Button window, select a button and enter *new\_clause* in the **Display name** field.

This enables this name to appear when you hover your mouse pointer over the icon from the Quick Access Toolbar.

7. Click the OK button.

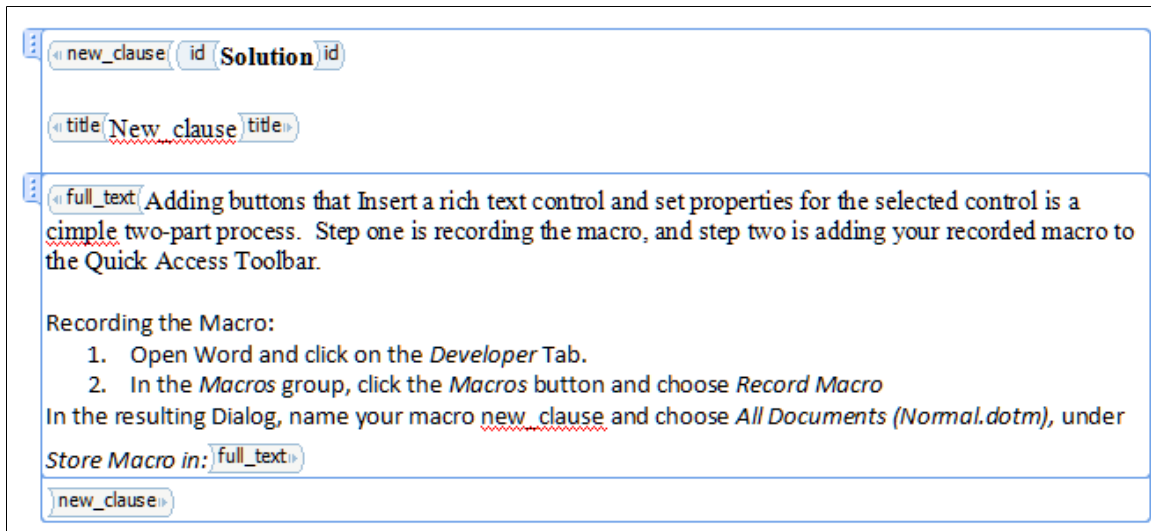
The macro button for the *new\_clause* macro is now located in the Quick Access Toolbar. When you want to tag a section of a clause as a *new\_clause*, highlight the text and click the button. The clause section will be tagged with the content control tags showing a *new\_clause*.

Repeat these steps to create macro buttons for these remaining content control tags: *id*, *title*, *full\_text*, and *by\_reference*.

### Example of a Clause Tagged with Multiple Content Controls

This is an example of a clause that is tagged with multiple content controls for clause title and full text. This is how your clauses should appear in your Word document:

This example illustrates the fields and controls on the Tagged Clause. You can find definitions for the fields and controls later on this page.



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**Note:** To view the tab on the left side, you must click on the text. To view the tags, such as new\_clause and title, you must be in Design Mode (Developer, Design Mode).

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# Supplier Contract Management Helpful Hints

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## Understanding Helpful Hints

These topics provide recommended solutions to some of the more common setup issues encountered by PeopleSoft Supplier Contract Management customers.

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**Note:** The information provided here is not consulting or implementation advice for your specific industry or your individual organization. You should adapt or disregard this information based on the needs of your organization. Oracle does not guarantee that the information included here will work as intended within your customized environment or as new versions of software are introduced.

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For more detailed information for setting up PeopleSoft Supplier Contract Management, see [Understanding PeopleSoft Supplier Contract Management Setup](#)

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## Implementation and Setup

These topics discuss:

- Supplier Contract Management setup needs.
- Setup Manager for PeopleSoft Supplier Contract Management.
- Dispatch, comparison, render, and prepare error resolution.
- Microsoft Word document launch problems.
- Microsoft Word template file errors.
- Document preview and generation errors.

## Supplier Contract Management Setup Needs

Depending on how you plan the implementation of PeopleSoft Supplier Contract Management and how your organization plans to use the application, the next level implementation such as setting up clause libraries, configurators, Microsoft Word templates, and so on are areas that require more thought and planning. This process varies from customer to customer, so the related setup varies. In addition to the information provided in this topic, you should review the [Understanding PeopleSoft Supplier Contract Management Setup](#) topic.

This list provides information about setting up PeopleSoft Supplier Contract Management:

- Secure File transfer protocol (SFTP) server.

Supplier Contract Management enables you to store documents within the database or using an SFTP server. If you decide to use the SFTP server, you can generally verify that it is working correctly by uploading a Microsoft Word template. If the upload fails, it indicates that the SFTP server is not setup correctly. A way to verify that the SFTP server is setup correctly is to log onto an application server and verify that you can manually login to SFTP files outside of the PeopleSoft application.

Common issues with using SFTP servers include:

- The application server not having network access to the SFTP server.
- The SFTP user does not have write authority to the SFTP server.
- The SFTP user password is not correct.

See [Setting Up Servers and Directories](#).

- Setting up secure file transfer protocol servers when you are already using database server attachments for other applications.

If an organization uses only the database setup, not file transfer protocol, for documents or attachments for applications other than PeopleSoft Supplier Contract Management, such as PeopleSoft eProcurement, and you do not want to switch those applications to a specific SFTP for use with PeopleSoft Supplier Contract Management, you can use the **Override Attachment Server ID** field on the Installation Options page to override the attachment server ID. You use the field to enter the active SFTP server for Supplier Contract Management document authoring.

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**Note:** You also have the option to configure the system to store all Supplier Contract Management attachments in the database instead of the SFTP server. In this case you should leave the **Override Attachment Server ID** setting on Installation Options page blank.

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**Note:** Overriding the attachment server does not control contract entry, purchase order, or requisition attachments. These attachments still go into the default server and database specified in the File Attachments component.

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**Note:** When you use both a database and SFTP server, you must remove the CS\_CONTRACT\_ENTRY row in the components grid on the Administer File Attachments page. This row should not be present because it only applies to the SFTP server, and when you are running both database and SFTP servers, the component writes to the database server. Leaving the row in place can cause problems with attachments in the Contract Entry component.

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- Microsoft Word Template.

You need to have a Microsoft Word template loaded into the system. Anytime you change or add a SFTP server, the system needs to use the Document Template and Styles page to verify that there is a template name listed. You can click the **View** button to make sure the system can locate it. If a template is not listed, or you receive an error, you need to upload a new template file. You use the Microsoft Word template as an essential starting point for creating and previewing clauses, sections, and configurators, and the template is a requirement for authoring documents.

See [Understanding Document Templates](#).

- Document format and options for new SetIDs.

PeopleSoft Supplier Contract Management provides a SetID (SHARE) that contains sample data for document default values and Microsoft Word paragraph styles that contain outline numbering styles. The paragraph styles listed in the sample data should match those in your template, because you can use the sample data setup when formatting and numbering content in authored documents. When you create a new SetID, you also need to set up the formatting options.

See [Setting Up Document Formats and Options](#).

- Installation options/server processing, document comparisons and rendering, and digital signatures.

You use the Installation Options page to set up and enable a variety of document authoring capabilities. This includes defining servers for comparing Microsoft Word documents, rendering .doc or .pdf files, and preparing files for digital signatures (.pdf or .docx). The server defined here must be a Microsoft Windows server configured with a dedicated application server that can service volume requirements. In addition, when this server is a 64-bit server, it might require that you start the Oracle Process Manager on the Microsoft Windows server using the local system account instead of a user account. This ensures that the application server has the proper authority to run the server-side processes, reducing errors such as having type mismatches.

- User preferences.

When you set up new users, you need to make sure that they have the correct user preferences. You use the User Preferences page to define security and permissions for document administrators and librarians and to delegate permissions among administrators, such as proxy users. Most other collaborators and interested parties do not need to have these user preferences defined, but for administrators the preferences are required.

See [Understanding User Preferences](#).

See [Understanding Supplier Contract Sample Permission Lists, Roles, and Users](#).

- Research task pane setup.

You use PeopleSoft Integration Broker to set up service operations and specify operation types that determine how the operation is to be processed, synchronously or asynchronously. The CS\_SEARCH\_BINDS and CS\_SEARCH\_CLAUSES operations used with the Research task pane are processed synchronously. After you set up the service operations and the integration gateway, you install and configure Microsoft Word for use with task panes, including the Research task pane for bind and clause searches.

In addition, depending on the machine setup, you might be using different versions of Microsoft Word. The configuration file for the setup.exe file contains a line that specifies which version of Microsoft Word is being used on the client. When using Oracle, Db2 Unix, Db2 OS390, and SqlServer platforms, you can search the full text in addition to the description and title. Using Informix and Sybase platforms, you can search only the clause description and title.

To view steps for setting up service operations and configuring workstations, see [Setting Up PeopleSoft Integration Broker for Microsoft Word](#).

## Related Links

[Understanding PeopleSoft Supplier Contract Management Setup](#)

## Understanding the Contract Library

### Setup Manager for PeopleSoft Supplier Contract Management

You use Setup Manager components to generate the list of implementation tasks for Supplier Contract Management. To access Setup Manager, select: **PeopleTools > Setup Manager > Manage Implementation Projects**, click the Products button, and select **Supplier Contract Mgmt** in the Supplier Relationship Management grid. Also, to use Setup Manager, you need to have related roles associated for proper security for buttons and actions with the component Manage Implementation Projects. From that component you can select products and generate the task list. Related roles include: PTLT\_IMPLEMENTER, PTLT\_PROJECT\_MGR, PTLT\_INTERNAL\_APPS.

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**Note:** Some setup steps are dependent on what features you are implementing. For example, you don't need to set up the Capture Parent Activity task unless you are using syndication.

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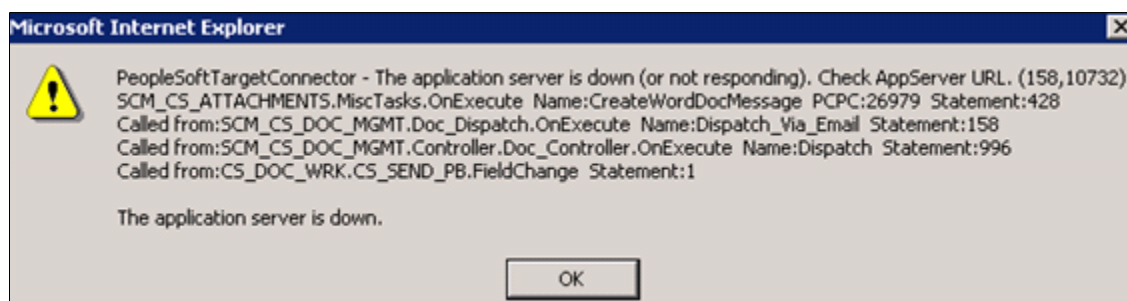
### Dispatch, Comparison, Render, and Prepare Error Resolution

You can receive various errors when dispatching a Microsoft Word .doc file or when performing a server-side comparison between Microsoft Word files. For functions such as dispatching a .doc file or comparing files, the system calls an internal application message using a Microsoft Windows application server and the Microsoft Word version that reside on the Microsoft Windows server.

See [Setting Up Document Comparison and Rendering](#).

These error message conditions can occur when various dispatch and comparison items are not setup correctly:

This screen shot shows an example of the message that would appear if the application server URL is not set up properly on the installation page, but the gateway is set up properly.



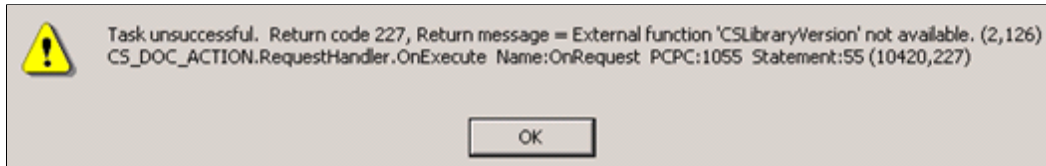
To resolve the message, update the URL entry on the Installation Options page to be `//<app server machine>:<JSL Port>`.

The gateway and application server are on the same version, but the application server doesn't have the publication or subscription set to *On*.

This condition is okay. The application sever used for the compare and render functions doesn't have to have either publication or subscription set to *On*.



This message appears when there is not a .dll file on the application server (csdocutil):



This message appears if you did not enter a default value or user ID and password on the configuration setting for the gateway properties:



This message appears when the integration gateway is on version *X* while the application server defined on the Installation Options page is on *Y*.



To verify the server PeopleSoft PeopleTools version:

1. Select: **PeopleTools > Integration Broker > Configuration > Gateways.**

The Gateways page appears.

2. Click the **Ping Gateway** button.

The PeopleSoft Integration Gateway page appears with the PeopleTools version. Make note of the version.

3. Open the Gateways page again.

4. Click the **Gateway Setup Properties** link.

The Configuration page appears.

5. Make sure that the PeopleTools release version listed in the top portion of the page and in the grid is the same as the one that appeared when you clicked the **Ping Gateway** button.
6. Verify that the Microsoft Windows application server defined in the Compare/Render Server/Path field on the Installation Options page is the same one as defined for the version of PeopleTools.

## Microsoft Word Document Launch Problems

When you click the **Edit Document** button or any button that launches a document and the window only flickers and the document doesn't launch, then most likely, a pop-up blocker or Windows Internet Explorer setting is causing the document not to launch. Sometimes, you can confirm that you have a pop-up blocker issue by pressing the Shift key on the keyboard while clicking the PeopleSoft button or link that launches the document. You can use this action to override the pop-up blocker setting and verify that this is the issue.

To resolve launch problems, also try these procedures:

- Make sure that you do not have any pop up blockers enabled such as in a Yahoo or Google search engine.

Keep in mind that there can be more than one blocking feature enabled. These features are normally set in the browser's toolbar.

- Check the Folder Options in the Control Panel to make sure that the **Confirm open after download** option is set for appropriate file extensions such as .doc.

Select: **Start > Control Panel > Folder Options > File Types**. Then, select the **DOC** extension for the .doc file type and click the **Advanced** button. The Edit File Type window appears with the **Confirm open after download** check box. Select the check box.

- Verify that your security settings in Windows Internet Explorer are set to enable automatic prompting of file downloads. The location of these types of settings can vary depending on the type and version of the browser.

From the browser toolbar, select: **Tools > Internet Options > Security > Custom Level**. Then, make sure that the **Enable automatic prompting for download files** and the **File downloads** buttons are selected.

## Microsoft Word Template File Errors

When you cannot upload the stdtemplate.xml, the system displays a template error message when you attempt to perform Microsoft Word tasks. Examples of these messages include:

- Cannot view the standard template.
- Cannot create a clause (get template error).
- Cannot preview clauses, sections, and configurators (get template error).

These errors normally happen when:

- A SFTP server is being used instead of a database server and the server is not set up correctly in the File Attachments component.
- The Microsoft Word template that the system uses to determine the paragraph styles and numbering when documents are generated has not been uploaded.

To resolve the errors:

- Verify the SFTP settings by selecting: **Set Up Financials/Supply Chain > Common Definitions > File Attachments > Administer File Attachments**.

The Administer File Attachments page appears. You can verify that the SFTP server that you entered is active and working by using the information on this page to try to log into the SFTP server with the user name and password to make sure they are okay. If you continue to have problems, submit a case to the Global Support Center with a screen shot for a resolution.

- Verify the installed application path setting for PeopleSoft Supplier Contract Management.

Select: **Supplier Contracts > Supplier Contracts Setup > Installation Options > Supplier Contract Management**. The **Application Server Path** field setting controls where the system stores temporary files on the application server for various functions. You can often leave this value blank, and the system will use the default temporary directory.

- Verify that you have the Microsoft Word template setup correctly.

Select: **Supplier Contracts > Supplier Contracts Setup > Document Templates and Styles**. You need to have the organization's version of the stdtemplate.xml loaded within this page. You can verify that it is loaded correctly by clicking the **View** button. This should launch the Microsoft Word file. If it doesn't or if you receive an error, try to upload the Microsoft Word .xml file again. If the file doesn't upload, you most likely have an SFTP server setup issue.

See [Understanding Document Templates](#).

## Document Preview and Generation Errors

If you receive an XML Parser Error CreateXMLDoc Fatal Error message when previewing or generating contract documents, there might be new Microsoft schema and namespace definitions that you need to properly build the generated preview and contract document.

When you define new clauses that you edit in Microsoft Word then preview the clause or later use it to generate a Microsoft Word document, you might receive the following or a similar error message:

```
XML Parser Error CreateXMLDoc Fatal Error: at File Integration Server line: 2
column: 37271 message: the prefix wsp has not been mapped to any URI (159,5)
SCM_CS_GEN_WORDXML.GenContractWordML.OnExecute.
```

This might happen with certain updates to Microsoft Word where there might be new Microsoft Word schema and namespace definitions that are needed to properly build the generated preview and contract documents.

Since the delivered stdtemplate.xml file, or a customer equivalent, might have been created with an older version of Microsoft Word than what you have, it may not have the newer schema information. It's recommended that if you use the stdtemplate.xml file delivered with the system, you should open it once, save it, and upload the file again into the PeopleSoft Supplier Contract Management system. This ensures that the XML is rewritten with the latest information that the system needs for you to preview or generate new documents.

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## Contract Library Setup

These topics discuss:

- Microsoft Word integration and formatting.

- Microsoft Word protection feature prevents document formatting.
- Clause editing and special characters.
- Microsoft Word prevents text edits or tracked change acceptance.
- Cannot cut or paste from Microsoft Word files into PeopleSoft Pages.
- Clause content alignment in documents and configurators.
- Page numbering inconsistent in Microsoft Word documents.
- Character column alignment (such as in a signature page).
- Research task pane return some or no results.
- Bind type validation errors during check in.

## Microsoft Word Integration and Formatting

If you need to understand more about how Microsoft Word integrates with Supplier Contract Management, such as paragraph styles, templates, formats, and XML schema, review the [Understanding Microsoft Word Integration with Supplier Contract Management](#) topic.

### Related Links

[Format and Style Considerations in Microsoft Word](#)  
[Troubleshooting Integration Issues](#)

## Microsoft Word Protection Feature Prevents Document Formatting

Sometimes, Microsoft Word's protection feature might prevent certain formatting, such as changes to the first or last line of the text, because protection start-and-end-indicator brackets are on the line that you are formatting.

When this occurs, you might be able to move the text (insert a blank line at top of the text or at bottom) next to the protection bracket to move you text away from the protection marker. Then, format the text and delete the blank unwanted line.

There may also be other cases where you are restricted from making certain edits to a Microsoft Word file, such as changing a style or accepting changes that have been tracked. You can frequently work around this by removing the document protection, making the change, and then setting protection again within Microsoft Word.

## Clause Editing and Special Characters

When you edit a clause and it looks okay, but when you preview the document the clause has an occasional special character, such as an upside down question mark, small square, or strange symbol translation for bullets, the system might have a multibyte data requirement.

Certain multibyte characters in Microsoft Word might not be supported when you integrate with a nonmultibyte PeopleSoft database for clause content in the library. If you are not using a Unicode

Standard database, you should avoid using these special characters within the clause library. This exception applies to library setup because the system stores this content in its database.

PeopleSoft attempts to clear and replace these special characters with nonmultibyte representations for you when your system (database) is not configured for multibyte storage when possible; however, a reasonable substitution may not always be available.

When it's not possible for you to run in a multibyte/unicode environment you might need to remove special characters when editing the clause document and substitute a different and more common or simpler non multibyte character representation instead. For example, you might want to turn off smart quotes and retype the quote as a plain double quote in Microsoft Word.

## Microsoft Word Prevents Text Edits or Tracked Change Acceptance

When Microsoft Word prevents you from editing text or performing a function on text, such as accepting tracked changes or refreshing a table of contents, it means that Microsoft Word's Protect Document feature has been set to restrict certain types of changes to the document.

For some data elements such as bind variables, the PeopleSoft system places protection around the bind in the document so that you cannot edit it in Microsoft Word. This prevents you from changing the source value for binds that originate from the transaction system using Microsoft Word. When the system prevents you from editing or accepting changes for a reason other than PeopleSoft bind protection, you must stop the protection in Microsoft Word, apply edits or run the function, and then start the protection again using Microsoft Word.

### Related Links

[Editing Clause Text](#)

[Protected Areas](#)

## Cannot Cut or Paste from Microsoft Word Files Into PeopleSoft Pages

When you cut and paste from a Microsoft Word document into PeopleSoft classic desktop browser UI clauses or sections, you can frequently lose the formatting and have corrupt characters when previewing or editing the clause or section.

Cutting and pasting content from Microsoft Word into PeopleSoft system pages for clause and sections content is not recommended because the text that appears on PeopleSoft pages does not support maintaining Microsoft Word's rich-text attributes. The system only allows plain text when you cut and paste into PeopleSoft pages. Therefore, it is recommended that you cut and paste from your current Microsoft Word file to an empty checked out version of your PeopleSoft clause or section (also in Microsoft Word) to preserve the document formatting that you want.

## Clause Content Alignment in Documents and Configurators

When you preview a clause, it appears correctly, but when you include it in a generated document or you preview it using the document configurator, the alignment indentation of the content is incorrect.

Possible causes and their solutions for an alignment (indentation) problems include:

- If the clause text in Microsoft Word is formatted normally without any special paragraph styles, the indentation problem might be caused by the incorrect set up of paragraph-style, outline-numbering indentation in the Microsoft Word template.

As a possible solution for this cause, when you preview a document in the configurator, note the Microsoft Word paragraph style that was applied to the previewed clause that is not correctly aligned. Review the details of that paragraph style's outline numbering and indentation specified for each level and correct any issues in the Microsoft Word template that are associated with the configurator.

- When you edit a clause and apply custom paragraph styles or direct formatting, the preview and generate functions merge the formatting and could cause you to lose the automatic indentation feature.

By overriding styles and numbering in a specific clause, you lose the advantage of predefined paragraph styles in the Microsoft Word template. In this case you can, if possible, remove the custom paragraph styles in the clauses and use a normal style. If this is not possible, you must use Microsoft Word to indent the information in the clause body definition itself so that it matches the outline position at which it is normally aligned in a generated document. You need to do this because the outline number and alignment from Microsoft Word templates are not used when you use custom styles within the clause.

### **Related Links**

[Setting Up Document Formats and Options](#)

[Styles and Formatting](#)

[Document Configurator Definition Page](#)

## **Page Numbering Inconsistent in Microsoft Word Documents**

When you page up and down in a Microsoft Word document and the page numbering increases just by paging up and down document, a problem might exist with Microsoft Word protection and change tracking. This problem can occur even if you don't change the document. An example of this problem is the page number might increase from 10 to 1,000 in a single scroll.

## **Character Column Alignment (Such as in a Signature Page)**

The character column alignment, for example, aligned columns and underlines for a signature page, appears correctly when you edit a clause, but when you preview the clause, the page has unaligned columns.

Hidden tabs used in the alignment of columns can cause problems when the clause is previewed and assembled with other content. This is because of the outline-numbering level at which the clause appears when it's previewed, or styles that the system applies during the preview. For example, the tab symbol can cause different levels of indentation based on the outline level, which in turn can shift values over.

To improve the alignment of column-oriented information, try using a hidden table in Microsoft Word instead of tabs.

## **Research Task Pane Returns Some or No Results**

When the Microsoft Word Research task pane does not return results from a search or is not working correctly, there are several possible causes, including:

- Messaging is not setup correctly.
- The client computer has not had the installation for client updates applied.
- The configuration file has incorrect information defined in it for client installation.

See [Setting Up a Clause URL to Appear in the Research Pane](#).

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**Note:** It's important to exit all instances of Microsoft Word on the client machine prior to running the PeopleSoft Supplier Contract Management setup.exe on that machine.

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The Research task pane might also just return some, but not all clauses. If a clause is too large for Research task pane integration, the search can fail. The system displays a warning if there is a potential for failure due to the size of the file. Clauses can become too large for XML representation and for visible clause text if there is a large amount of custom formatting or custom paragraph styles applied to the clause.

A possible solution is to simplify custom formatting of these clauses or divide the clause into smaller pieces.

## Bind Type Validation Errors During Check In

You can enter a valid bind variable into a Microsoft Word document or select it from the Microsoft Word Research pane and place it into the document. But, when you check in the document, the system displays validation errors for the bind variable. This happens because Microsoft Word has features that do automatic correction and tracking of grammar errors in documents that may be visible as you type names. When a field has the grammar underline beneath it, it normally means extra values are included in the XML bind value being checked in and is making the bind value no longer valid upon check in to the PeopleSoft system.

Because there are multiple versions of Microsoft Word, and a variety of user settings for each client, there are several possible resolutions for this issue. The first and simplest resolution is try to cut the bind variable text within Microsoft Word, and then paste it back to the same location. But, after pasting the variable, click the small Microsoft Word clipboard (Paste Options) that appears when you paste the variable and click the '**Keep Text Only**' button. This can often remove any special formatting so that the bind will validate correctly when you check in the document.

If the problem persists, the next action to correct the issue is to change the spelling and grammar setting while editing the clause having the error. Use these steps to correct the issue:

1. Select Tools on the Microsoft Word toolbar.
2. Select Language, and then select Set Language.

The Language window appears.

3. Select the **Do not check spelling or grammar** check box for English when maintaining bind variables to avoid having special character inserted into the bind names.
4. Delete and retype the bind variable.

Verify that no grammar check underlines appear for the bind variable.

5. Check in the document again.

If this does not resolve the issue, you can try indicating not to store random numbers within the document. This Microsoft Word feature has at times inserted random numbers within the bind variable name XML and causes bind validation errors during check in of the document. To clear the setting because the location might change depending on versions of Microsoft Word:

1. Select Tools on the Microsoft Word toolbar.
2. Select Options, and then select the Security tab.
3. Deselect the **Store random number to improve merge accuracy** check box.

Finally, you can use the Microsoft Word Research task pane as a possible alternative. You can search and insert the bind variable using the Research task pane lookup for binds. In some cases, this alternative bypasses Microsoft Word's behavior of inserting grammar checks that can cause the problem.



# Delivered Workflows for PeopleSoft Supplier Contract Management

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## Delivered Workflows for PeopleSoft Supplier Contract Management

These topics discuss PeopleSoft Supplier Contract Management workflows. The workflows are listed alphabetically by workflow name.

See the product documentation for *PeopleTools: Workflow Technology*, *PeopleTools: Applications User's Guide*

### Related Links

[Understanding PeopleSoft Supplier Contract Management Workflow](#)

[Workflow in PeopleSoft Supplier Contract Management](#)

[PeopleSoft Approval Framework Process](#)

[Approval Framework Users](#)

[Setup Steps for PeopleSoft Approval Framework](#)

[Approval Setup and Transaction Tables](#)

[Understanding Document Approvals](#)

[Defining User Preferences and Installation Options for Document Approvals](#)

[Approving Clauses](#)

[Approving Documents](#)

## Agreement and Verification Step Notification

These topics discuss the PeopleSoft Supplier Contract Management workflow notifications for contract agreements, verification steps, and performance metrics.

### Description

<i>Information Type</i>	<i>Description</i>
Event Description	An agreement and its associated verification steps are assigned to a contract, and the system notifies interested parties regarding action or review needed for agreements and verification steps, as well as system-calculated supplier performance metrics.

<i>Information Type</i>	<i>Description</i>
Action Description	The system sends workflow notifications to interested internal and/or external parties when due dates are approaching or past due and an action must be completed. This might include securing documents, confirming an agreed upon date, or completing required inspections. In addition, the system can send notifications for metric-based agreements for warning and unacceptable performance. These performances are based on targeted and tolerance percentages defined for a contract as compared against the latest history information that you process using the Update Procurement Info component from within the Supplier Contracts Monitor and Update Agreements folder.
Notification Method	Email and worklist.

### Related Links

[Assigning Agreements to Purchasing Contracts](#)

[Understanding Agreement Metrics](#)

## Clause Approval

These topics discuss the PeopleSoft Supplier Contract Management workflow that uses the PeopleSoft Approval Framework to route and approve clauses for approval.

### Description

<i>Information Type</i>	<i>Description</i>
Event Description	A clause is submitted for workflow approval using the <b>Submit for Approval</b> button on the Clause Definition page.
Action Description	The system notifies appropriate users that a clause in the library requires review and approval. Approvers can approve, deny, or push back the clause.
Notification Method	Email and worklist.
Email Template	Clause Approval (Routing for Clause Approvers)

### Related Links

[Approving Clauses](#)

## Collaboration

These topics discuss Supplier Contract Management collaboration that uses the PeopleSoft Approval Framework to route documents for collaboration.

### Description

<i>Information Type</i>	<i>Description</i>
Event Description	A document is submitted for collaboration using the <b>Route Internally</b> or the <b>Route Externally</b> button on the Document Management page.
Action Description	The system notifies the appropriate internal or external collaborators and reviewers that a document is ready for collaboration.
Notification Method	Email and worklist.
Email Template	DocumentCollabReview (Document Collaboration Review)

### Related Links

[Collaborating on Documents](#)

## Document Approval

These topics discuss the Supplier Contract Management workflow that uses the PeopleSoft Approval Framework to route documents for approval.

### Description

<i>Information Type</i>	<i>Description</i>
Event Description	A document is submitted for workflow approval using the <b>Submit for Approval</b> button on the Document Management page.
Action Description	The system notifies appropriate users that a document requires review and approval. Approvers can deny or approve the document.
Notification Method	Email and worklist.

<i>Information Type</i>	<i>Description</i>
Email Template	Document Approval (Routing for Contract Approvers)

## Related Links

[Approving Documents](#)

## Document Signatures

These topics discuss the Supplier Contract Management workflow that uses the PeopleSoft Approval Framework to route documents for signatures.

### Description

<i>Information Type</i>	<i>Description</i>
Event Description	An authored document requires signatures.
Action Description	When using digital signatures and routing prepared documents for signature before or after approvals, the system notifies designated signer users in the <b>Internal Contacts/Signers</b> link sequentially as each user signs the document. Unlike collaboration, where the system notifies all users within the list simultaneously, the system routes documents for internal signatures sequentially based on the sign order. You can also use the Send to Contacts or Dispatch pages to notify suppliers that signatures are required.
Notification Method	Email and worklist.
Email Template	Document Sign (Document Signature)

## Spend Threshold

These topics discuss the Supplier Contract Management workflow to send spend threshold notifications.

### Description

<i>Information Type</i>	<i>Description</i>
Event Description	Workflow notifications are sent for contracts specified that have spend threshold defined for them.

<b><i>Information Type</i></b>	<b><i>Description</i></b>
Action Description	The system sends workflow notifications to interested parties when the spend amount against a contract exceeds the threshold amount specified on the contract.
Notification Method	Email and worklist. Run the Contract Workflow Notification (CS_CNTRCT_WF) process.

**Related Links**

"Creating Spend Thresholds, Notifications, and Alerts for Contracts" (PeopleSoft Source to Settle Common Information)



# PeopleSoft Supplier Contract Management Reports

## PeopleSoft Supplier Contract Management Reports: A to Z

The following table lists the PeopleSoft Supplier Contract Management reports, sorted alphanumerically by report ID. If you need more information about a report, refer to the report details at the end of this topic.

**Note:** For samples of these reports, see the Portable Document Format (PDF) files published with your online documentation.

See the product documentation for *PeopleTools: Process Scheduler*

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
CS_DOCSTAT1 Document Status Summary	Displays basic document status information in a tabular layout, with one line per document. This report provides a summary listing for documents by administrator, department, status, and other selection criteria. The report is sorted by library SetID, then source transaction, document type, administrator, ad hoc SetID/ad hoc ID, contract SetID, contract ID, and purchase order business unit/purchase order ID.	Supplier Contracts, Reports, Document Status Summary	CS_RPT_DSTAT1
CS_DOC_STAT2 Document Status Detail	Provides detailed document status information in a tabular layout with one line per document. This report provides a more detailed listing for documents by administrator, department, or status. The report is sorted by library SetID, then source transaction, document type, administrator, ad hoc SetID/ad hoc ID, and contract SetID.	Supplier Contracts, Reports, Document Status Detail	CS_RPT_DSTAT2

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
CS_OBJ_DEV Contract Content Deviations	Displays the objects that have been manually modified in documents according to user-specified criteria. This report helps you determine which contracts have had deviations made to them. This report has two additional versions that are defined next.	Supplier Contracts, Reports, Contract Content Deviations	CS_RPT_OBJDEV
CS_OBJ_DEV_2 Contract Content Deviation Summary	This report is the same as the CS_OBJ_DEV_1 report but does not include object text.	Supplier Contracts, Reports, Contract Content Deviations	CS_RPT_OBJUSE
CS_OBJ_DEV_3 Contract Content Deviation by Contract	This report is the same as the CS_OBJ_DEV_1 report, but is sorted by contract and then library object within the contract. This report includes the modified object text.	Supplier Contracts, Reports, Contract Content Deviations	CS_RPT_OBJUSE
CS_OBJ_USAGE Contract Content Usage	Displays where clauses and sections have been used in documents according to the user-specified criteria. hat were created or modified as of the specified date and where they have been used. The report does not include unused objects. The report is sorted by library SetID, content type, content ID, and then transaction keys (contract SetID/business unit, ad hoc ID, contract ID, and purchase order ID).	Supplier Contracts, Reports, Contract Content Usage	CS_RPT_OBJUSE
CS_OBJ_UNUSE Unused Contract Content	Displays clause and section objects that were active as of the specified criteria and are still active, but have not been used in any documents created since the specified date. This report helps you determine which content may be obsolete and available for inactivation. The report is sorted by library SetID, content type, and then content ID.	Supplier Contracts, Reports, Unused Contract Content	CS_RPT_OBJUNUSE



## PeopleSoft Supplier Contract Management Selected Reports

These topics provide detailed information about individual reports including important fields. The reports are listed alphabetically by report name.

### Common Elements Used with PeopleSoft Supplier Contract Management Selected Reports

<i>Field or Control</i>	<i>Description</i>
<b>Administrator</b>	Displays the document administrator.
<b>Approval Type</b>	Displays the approval type for the clause that has been updated.
<b>Class</b>	Displays the clause class ID, for the updated clause.
<b>Content ID</b>	Displays the object ID and description.
<b>Content Type</b>	Displays the SetID and type of object.
<b>Department</b>	Displays the department listed on the document.
<b>Description</b>	Displays the object description.
<b>Document ID</b>	Displays the document in which the change occurred. This identifier includes the SetID, source transaction, and document ID.
<b>Sponsor</b>	Displays the user ID assigned as the sponsor of the document.
<b>Status</b>	Displays the status of the document in which the object appears.
<b>Type</b>	Displays the document type that was used to create the document. The library SetID also appears with the document type.

### Document Status Summary (CS\_DOC\_STAT1)

The Document Status Summary report provides basic document status information for the documents that you select to include in the report. Header information for the report appears on each page of the report and includes the report definition, name, and when it was created. The first page of the report also provides the report parameters and sort order.

<b>Field or Control</b>	<b>Description</b>
<b>Transaction ID</b>	Displays source transaction and then the system identifier for ad hoc, purchasing, and purchase order documents. For PeopleSoft Purchasing and purchase order documents, the column also displays the supplier ID.
<b>Status</b>	<p>Displays the status of the corresponding document. Status values are assigned depending on a document's life-cycle stage. These values include:</p> <ul style="list-style-type: none"> <li>• <i>Approved</i></li> <li>• <i>Collaborated</i></li> <li>• <i>Collaborated, Pending Review</i></li> <li>• <i>Complete</i></li> <li>• <i>Dispatched</i></li> <li>• <i>Draft</i></li> <li>• <i>Executed</i></li> <li>• <i>Pending Approval</i></li> <li>• <i>Pending Collaboration</i></li> <li>• <i>Pending External Collaboration</i></li> <li>• <i>Pending Internal Review</i></li> </ul>
<b>Document Type</b>	Displays the document type and the library SetID. Document types can help you organize and further categorize documents that you use in the document authoring system. Using document types, you can define specific settings, defaults, and security that can help fine-tune the use of each type of document. Document types can also control document statuses.
<b>Version</b>	Displays the current version of the document. Versions help manage and control the flow of a document. Minor versions begin with 0.01 as the version number, while major versions begin with 1.00 as the version number. If an amendment exists, the amendment version also appears.
<b>Begin Date/Expire Date</b>	Displays the beginning date and expiration date for a contract. For ad hoc documents only, this date represents the start date of the document. For example, this might be the begin date of the contract. The system uses this date to determine which effective content to use from the configurator ID when creating the document. For purchasing contract documents, the begin date is already specified in the contract itself.

<b>Field or Control</b>	<b>Description</b>
<b>Transaction Status</b>	<p>Displays the current status of the purchase order or purchasing contract. This value is retrieved from the <b>Status</b> field on the purchasing contract. Values for the purchasing contract include:</p> <ul style="list-style-type: none"> <li>• Approved</li> <li>• Cancelled</li> <li>• Closed</li> <li>• On-hold</li> <li>• Open</li> </ul> <p>Values for the purchase order include:</p> <ul style="list-style-type: none"> <li>• <i>Approved</i></li> <li>• <i>Canceled</i></li> <li>• <i>Complete</i></li> <li>• <i>Dispatched</i></li> <li>• <i>Denied</i></li> <li>• <i>Initial</i></li> <li>• <i>Line Denied</i></li> <li>• <i>Open</i></li> <li>• <i>Pending Approval/Approved</i></li> <li>• <i>Pending Cancel</i></li> </ul>

### Document Status Detail (CS\_DOC\_STAT2)

The Document Status Detail report provides more detailed document status information. Header information for the report appears on each page of the report and includes the report definition, name, and when it was created. The first page of the report also provides the report parameters and sort order.

<b>Field or Control</b>	<b>Description</b>
<b>Document</b>	Includes a variety of information about the document. For example, the document ID, transaction status, document type, library SetID, administrator, version, sponsor, and department.

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Current Status and User Fields</b>	<p>Displays the document status and user fields. See the previous report for document status values.</p> <p>Based on the status, additional information might exist if the document is:</p> <ul style="list-style-type: none"> <li>• Approved – when it was approved</li> <li>• Collaborated – when it was collaborated, and the collaboration version.</li> <li>• Completed – when it was completed.</li> <li>• Dispatched – when it was dispatched and the dispatch version.</li> <li>• Executed – when it was executed.</li> <li>• Amended – the amendment number and option and when it was amended.</li> </ul> <p>When user-defined fields have been established and are being used in the document, the report displays those fields and their values.</p>

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Activity</b>	<p>Displays the most recent activities against the document. Activities include when the document was created, modified, checked in and out, approved, and begin and end dates.</p>

## **Contract Content Deviations (CS\_OBJ\_DEV)**

The Contract Content Deviations report displays the objects that have been manually modified, added, or deleted in documents as of the user-specified criteria. Using the run control options for class or approval type, you can filter the deviations for a document based on a subset of specific clauses in the library that need to be monitored for deviations. The report also provides filter criteria by document type, source transaction, and an option to include only in-process documents. This option enables you to monitor deviations for any documents that are currently in development.

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**Note:** The content deviations reported in this report are based on additions, changes, or deletions to library objects. Any additions, changes, or deletions to free formatted text within documents is not included in this report

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Header information for the report appears on each page of the report and includes the report definition, name, and when it was created. The first page of the report also provides the report parameters and sort order.

Dates for checked in documents represent when the document was checked in, not when the actual change took place for the object, which might be an earlier date. The last modified date will always reflect the last time the entire document was checked in.

The report first displays the object and information about the object. Then in the next section, the report displays the document information that describes which documents. When you make a change to a clause or section, this report enables you to review the change and view which documents contain the changed object.

Two other versions of the Contract Content Deviations report also exist. The first version is the Contract Content Deviation Summary report (CS\_OBJ\_DEV\_2). This report is the same as CS\_OBJ\_DEV\_1 but does not include object text

The second version is the Contract Content Deviation by Contract (CS\_OBJ\_DEV\_3) This version is the same as CS\_OBJ\_DEV\_1, but is sorted by contract and then library object within the contract. This report includes the modified object text.

<b>Field or Control</b>	<b>Description</b>
<b>Status/Version</b>	Displays the status and version of the document in which the object change occurred.
<b>Configurator ID</b>	Displays the configurator used to create the changed document. This includes configurators for the main document, amendment, and executive summary as appropriate.
<b>Change Type</b>	Displays the type of change that was made to the object. Values include:  <i>Add.</i>  <i>Change.</i>  <i>Delete.</i>
<b>Body Type</b>	Displays where in the document the change was made. Values include:  <i>Full:</i> Indicates the full text in the body of the object.  <i>Reference:</i>  Indicates the change was made to a reference in the object.  <i>Title:</i> Indicates that the change was made to the object title.
<b>Library Content Text</b>	Displays the object text that has been manually added, changed, or deleted.

## Contract Content Usage (CS\_OBJ\_USAGE)

The Contract Content Usage report displays clauses and sections that have been used within documents as of the specified criteria. This report helps you identify the use of groups of clauses by document within a specified date range or other criteria. The report does not include any unused objects. The report is sorted by library SetID, content type, then content ID, and then by transaction key: SetID/business unit, ad hoc ID/contract ID/purchase order ID.

Header information for the report appears on each page of the report and includes the report definition, name, and when it was created. The first page of the report also provides the report parameters and sort order.

Information fields in this report are similar to those in the Contract Content Deviations report. The report does not include changed text, but does include an effective date on which you view used object information.

<b>Field or Control</b>	<b>Description</b>
<b>Configurator ID</b>	Displays the configurator used to create the reported document. This includes configurators for the main document, amendment, and executive summary as appropriate
<b>Body Type</b>	Displays where in the document the change was made. Values include:  Full: Indicates the full text in the body of the object. Reference: Indicates the change was made to a reference in the object. Title: Indicates that the change was made to the object title.
<b>Effective Date</b>	Displays effective date of the object used in the document.

## Unused Contract Content CS\_OBJ\_UNUSE

The Unused Contract Content report displays clauses and sections that were active as of the specified criteria and are still active, but have not been used in any documents created using the specified criteria. This information helps you determine outdated or dormant objects in the contract library.

The report is sorted by library SetID, content type, then content ID. The report provides created and last modified-date ranges along with other criteria that enable you to identify unused objects in documents. For example, you can generate a report of all unused contract clauses in the past year to produce a list of content that might need to be inactivated.

Header information for the report appears on each page of the report and includes the report definition, name, and when it was created. The first page of the report also provides the report parameters and sort order.

Information fields in this report are similar to those previous reports. The report includes an effective date from which you can view object use information.

<b>Field or Control</b>	<b>Description</b>
<b>Section Information</b>	Displays the type of section. Section types include <i>Title</i> , <i>General</i> , and <i>Placeholder</i> .
<b>Clause Information</b>	Displays information about the clause. The information includes the clause ID, class, and approval type.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Library</b>	Displays the library to which a clause belongs. A library is a grouping of clauses that you can use for documentation purposes.
<b>Last Updated</b>	Displays when the object was last updated and the operator who made the update.

