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PeopleSoft Enterprise Supplier Contract Management 9.1 PeopleBook

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Preface

This preface discusses:

- Oracle's PeopleSoft application fundamentals.
- Pages with deferred processing.
- Common elements used in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

Oracle's PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise Supplier Contract Management 9.1 PeopleBook* 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 these PeopleBooks.

The following companion PeopleBooks contain information that applies specifically to Supplier Contract Management.

- *PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook*
- *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*
- *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*
- *PeopleSoft Supply Chain Management Common Information 9.1 PeopleBook*

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Pages With Deferred Processing

Several pages in Supplier Contract Management operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page, for example, if a field contains a default value, which is any value you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

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Common Elements Used in This PeopleBook

Approval Status	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.
Bind Variable	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.
Clause	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.
Clause Group	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.
Contract Document	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.
Contract Syndication	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.
Contract Version	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.
Contract Wizard	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.

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Digital Signatures	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 2007 .docx signature document. The .docx file is used for signatures only.
Document	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.
Document Configurator	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.
Document Library	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.
Document Type	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.
Document Version	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.
Effective Date	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.
Local System	The PeopleSoft system of record that publishes and maintains contract information for the parent contract.
Question Group	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.

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Repeating Element 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.

Rule 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:

- Clauses to define alternate clauses.
- Sections to optionally include additional clauses.
- Document configurators to include optional clauses and sections.

Since the rules themselves generate structured query language (SQL) and can have performance implications, they should only be defined and maintained by technical personnel.

Run Control ID 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.

SetID 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.

Status Indicates whether a row in a table is *Active* or *Inactive.* You cannot display inactive rows on transaction pages or use them for running batch processes. The *Inactivate* 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.

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.

Transactional Contract 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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Part 1

Supplier Contract Management Overview

Chapter 1
Getting Started with PeopleSoft Supplier Contract Management

Chapter 2
Understanding PeopleSoft Supplier Contract Management

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Chapter 1

Getting Started with PeopleSoft Supplier Contract Management

This chapter provides an overview of Oracle's PeopleSoft Enterprise Supplier Contract Management and discusses:

- PeopleSoft Supplier Contract Management integrations.
- PeopleSoft Supplier Contract Management implementation.

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 Verity search repository for those formats supported by Verity.
- Import clauses from existing Microsoft Word contracts by tagging them using Microsoft Word 2003 Professional Edition, and uploading the file.

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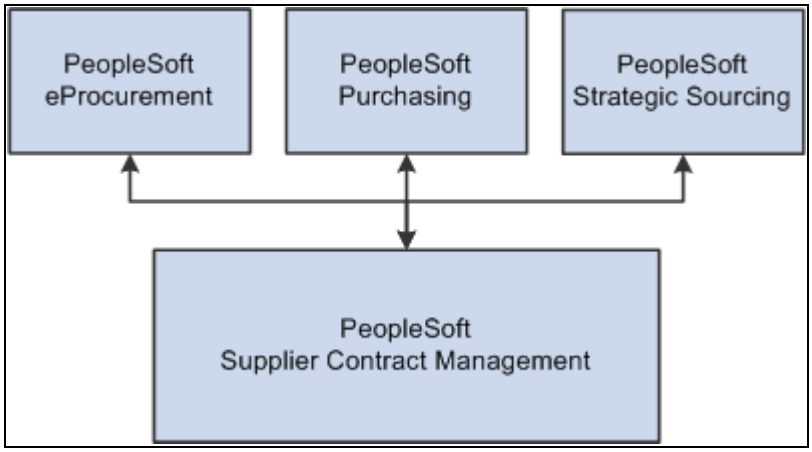
- Perform robust searches for contract and clause library content and related field information.
- Provide users with a native Microsoft Word environment in which they can work with documents.

  Note. Make sure you are using the latest service pack (SP) of Microsoft Office Word 2003, at least SP1, and that the application is a part of Microsoft Office Professional Edition 2003. The Standard version is not sufficient for editing and maintaining PeopleSoft custom Extensible Markup Language (XML) tags.

- 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 applications:



Supplier Contract Management integrations

Supplier Contract Management integrates with the following PeopleSoft applications:

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

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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 vendor 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 indented 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

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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.

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 PeopleBook documentationr

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. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook*, with information about where to find the most current version of each.

See Also

"Preface," page xxi

PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook, "PeopleSoft Enterprise Application Fundamentals PeopleBook Preface"

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

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Chapter 2

Understanding PeopleSoft Supplier Contract Management

This chapter discusses:

- PeopleSoft Supplier Contract Management.
- Supplier contract components.
- Supplier contract sample permission lists, roles, and users.
- PeopleSoft Supplier Contract Management integration with other PeopleSoft applications.
- Microsoft Word integration with PeopleSoft Supplier Contract Management.

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.

Supplier Contract Management features include integration with Microsoft Word 2003 .xml file formats that are supported in both Microsoft Word 2003 and Microsoft Word 2007. 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 either Microsoft Word 2003 Professional Edition or Microsoft Word 2007 version using the 2003 .xml format.

Note. PeopleSoft Supplier Contract Management renders Microsoft Office Word 2003 .xml format as its native working environment. Microsoft Office Word 2003 is a part of Microsoft Office Professional Edition 2003. In this document, all references to Microsoft Word, unless specified differently, are references to the Word 2003 .xml format of Microsoft Word.

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.

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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 vendor 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.

Supplier Contract Components

This section 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.

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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 vendor 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.

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.

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

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 vendor 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, 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 Internet Architecture 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 2003 Professional or a later version.

The next chart illustrates the components of the transactional and the document authoring systems that make it possible to create documents:

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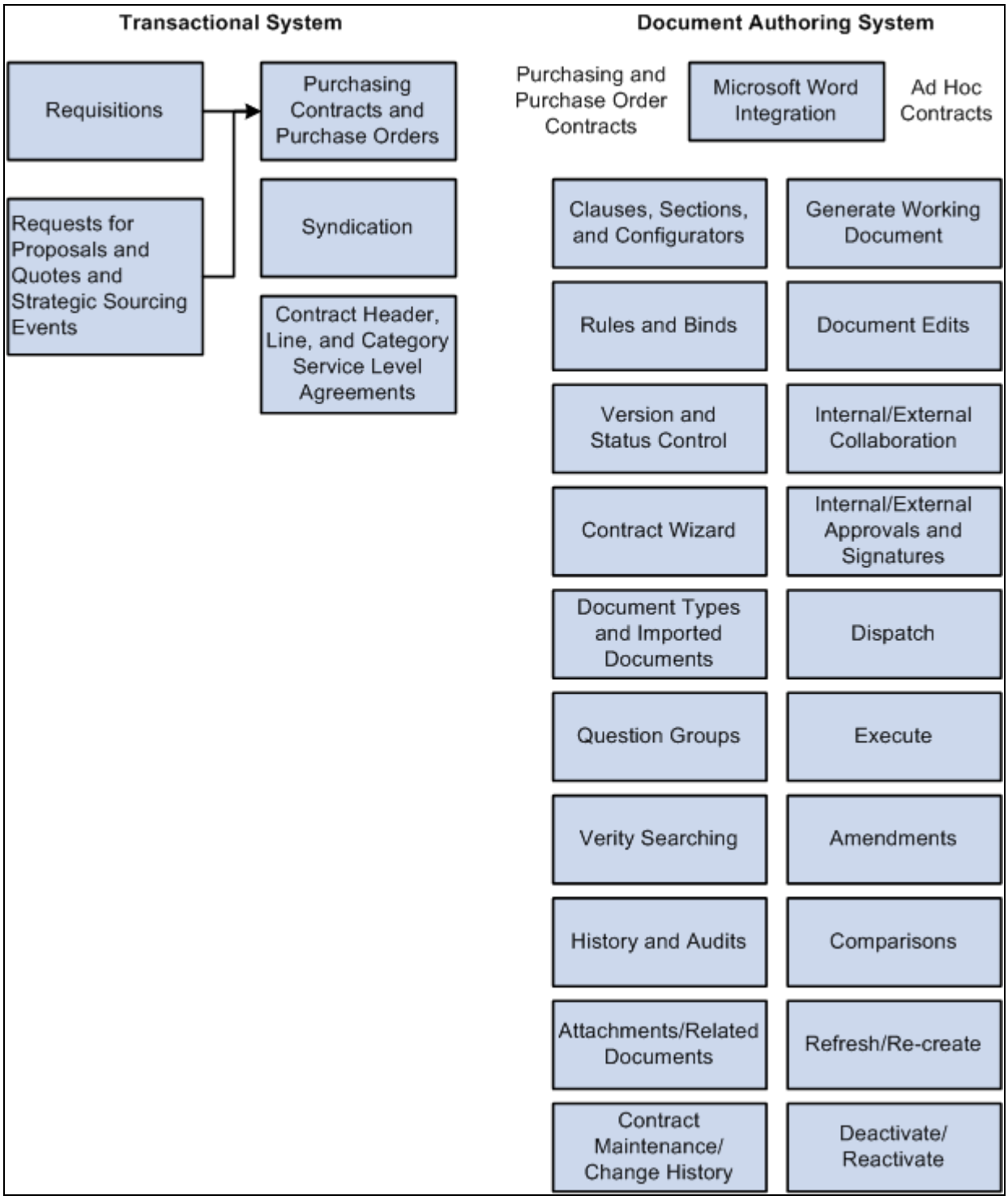

Supplier Contract Management components

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.

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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.

The next sections provide a high-level overview of these elements and cross-references to more detailed information about the feature.

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.

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

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.

See Also

Chapter 3, "Defining Supplier Contracts," Understanding Supplier Contract Management Transactional Purchasing Contract Definition (Contract Entry), page 35

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.

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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.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Using Voucher and Order Contracts," Creating Contract Headers

Chapter 3, "Defining Supplier Contracts," Adding Purchase Order Contract Documents, page 55

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.

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- 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.

See Also

Chapter 5, "Managing Contract Agreements," page 109

Chapter 4, "Defining Contract Agreements," page 71

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 vendor 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.

See Also

Chapter 12, "Generating Microsoft Word Documents," page 441

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Document Library

This section 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 Verity searches on imported documents.

See Chapter 11, "Importing Clauses, Sections, and Documents," page 399.

See Chapter 9, "Managing the Contract Library," Understanding the Contract Library, page 271.

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 Chapter 9, "Managing the Contract Library," Understanding the Contract Library, page 271.

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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 Chapter 9, "Managing the Contract Library," Understanding Document Rules, page 287.

See Chapter 9, "Managing the Contract Library," Understanding Bind Variables, page 289.

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 Chapter 10, "Using the Contract Document Wizard," page 365.

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 Chapter 10, "Using the Contract Document Wizard," Setting Up Question Groups for the Contract Wizard, page 376.

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.

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- 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.

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

See Chapter 9, "Managing the Contract Library," Setting Up Document Types, page 354.

Verity Searching

Verity searching is a search engine that PeopleSoft applications use to perform free-text data searches. A Verity search index is a specific directory or folder that contains multiple subdirectories with various kinds of files for use by the Verity 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 Chapter 14, "Searching for Library and Document Contents," Understanding Verity and Where-Used Searches, page 591.

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Document Life Cycle

This section 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 Chapter 13, "Managing Document Life Cycles," Understanding Document Life Cycles, page 464.

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 Chapter 13, "Managing Document Life Cycles," Refreshing and Re-creating Documents, page 514.

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 Chapter 17, "Approving Documents and Document Components," Understanding Document Approvals, page 649.

See Chapter 13, "Managing Document Life Cycles," Understanding Life-Cycle Statuses and Actions, page 466.

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.

See Chapter 12, "Generating Microsoft Word Documents," page 441.

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Document Edits, Previews, and Views

Along with editing and viewing documents using PeopleSoft Internet Architecture 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 Chapter 9, "Managing the Contract Library," Defining Contract Clauses, page 307 and Chapter 9, "Managing the Contract Library," Defining Contract Sections, page 323.

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 Chapter 5, "Managing Contract Agreements," Uploading Attachments for Agreement Steps, page 120 and Chapter 13, "Managing Document Life Cycles," Viewing and Uploading Attachments and Related Documents, page 554.

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.

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 Microsoft Word 2003 Professional or a newer version of Microsoft Word that supports the Microsoft Word 2003 XML format. For example, if the supplier uses the Standard Edition of Microsoft Word 2003 instead of the Professional Edition, then any changes that the supplier makes must be manually incorporated into the master authored document within the system.

See Chapter 13, "Managing Document Life Cycles," Collaborating on Documents, page 542.

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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 vendor 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.

See Chapter 17, "Approving Documents and Document Components," page 649.

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.

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. 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.

See Chapter 13, "Managing Document Life Cycles," Signing Documents Using Digital Signatures, page 572.

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 Chapter 13, "Managing Document Life Cycles," Dispatching Documents, page 564.

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 Chapter 13, "Managing Document Life Cycles," Executing Documents, page 585.

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.

See Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," page 679.

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.

See Chapter 13, "Managing Document Life Cycles," Comparing Documents, page 586.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up Supplier Contract Attachment Database and FTP Servers and Directories, page 197.

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 Chapter 13, "Managing Document Life Cycles," Refreshing and Re-creating Documents, page 514.

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.

See Chapter 13, "Managing Document Life Cycles," page 463.

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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 Chapter 13, "Managing Document Life Cycles," Deactivating and Reactivating Documents, page 589.

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 vendors, 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.

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

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.

See Also

Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," page 157

Supplier Contract Sample Permission Lists, Roles, and Users

This section 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:

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Sample User	*Sample Role Name*	*Sample Permission List*	*Description*
CSADMIN - Supply Contract Administrator	Supplier Contract Agree Update (supplier contract agreement update)	EPCS5000 - Supplier Contrct 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 Hrdware 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.
CSAPPR1 - Supplier Contract Approver CSLEG1 - Clause Approver	Supplier Contract Interested	EPCS4000 - Supplier Contracts Casual User EPCS6000 - Supplier Contrct 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 Contrct Administrator (supplier contract administrator)	EPCS1000 - Supplier Contracts Setup EPCS2000 - Supplier Contracts Library EPCS3000 - Supplier Contracts and Documents EPCS5000 - Supplier Contrct Agree Updates EPCS6000 - Supplier Contrct 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.

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Sample User	*Sample Role Name*	*Sample Permission List*	*Description*
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 section 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 Verity 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.

See Chapter 13, "Managing Document Life Cycles," Understanding Life-Cycle Statuses and Actions, page 466.

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.

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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 or deny 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 Vendor Contact page for contract collaborator contact types.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Maintaining Vendor Information," Entering Contact 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 to contacts, 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.

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See Also

Chapter 13, "Managing Document Life Cycles," Collaborating on Documents, page 542

Chapter 13, "Managing Document Life Cycles," Sending Documents to Internal and External Contacts, page 558

Chapter 13, "Managing Document Life Cycles," Dispatching Documents, page 564

Chapter 17, "Approving Documents and Document Components," Setting Up User Preferences for Document Approvals, page 651

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 section 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.

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- 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 vendor 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:

Requirement	***Document Input***
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.

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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.

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- 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.

  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 assigned the document.

The intent for requisition document creation is to define a related document and wizard that captures additional information from the a 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 Enterprise 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.

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.

Microsoft Word 2003 enables you to access documents in a familiar format for viewing and editing. You use Microsoft Word 2003 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 Word 2003 Professional, Microsoft Word 2003 .xml format, or later version as its native working environment. Microsoft Office Word 2003 is a part of Microsoft Office Professional Edition 2003. In this document, all references to Microsoft Word, unless specified differently, are references to this version of Microsoft Word.

To integrate and author Microsoft Word 2003 documents, the PeopleSoft system uses Microsoft WordProcessing Markup Language (WordML). This Microsoft Word 2003 .xml format is available with Microsoft Word 2003 or Word 2007, which is required for use with PeopleSoft Supplier Contract Management. The system provides custom tags that are extensions to Microsoft WordML.

Using the clause library, you can optionally use Microsoft Word for editing and maintaining rich-text content in the clause. Even when you maintain the clause as plain text in PeopleSoft pages, the system stores the equivalent Microsoft WordML version of the clause for later use with document generation. You can also import clauses into the clause library. Using a special set of .xml tags, you can define elements of a clause 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.

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.

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.

See Appendix A, "Microsoft Word Integration with Supplier Contract Management," page 701.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Document Templates and Styles, page 252.

Microsoft Word Setup

System administrators and end users must perform setup procedures to use Microsoft Word 2003 Professional Edition or Microsoft Word 2007 saving document in compatible Word 2003 .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.

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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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Document Templates and Styles, page 252.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Default Settings for Document Formats and Options, page 254.

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Part 2

Supplier Contract Management Transactional System

Chapter 3
Defining Supplier Contracts

Chapter 4
Defining Contract Agreements

Chapter 5
Managing Contract Agreements

Chapter 6
Maintaining Supply-Side Documents and Deliverables

Chapter 7
Syndicating Supplier Contracts and Contract Messaging

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Chapter 3

Defining Supplier Contracts

This chapter provides an overview of Supplier Contract Management transactional procurement contract definition and discusses how to:

- Create purchasing contracts (contract entry).
- Add purchasing contract documents.
- Add purchase order contract documents.
- Set up spend thresholds and run contract alert workflows for purchasing contracts.
- Set up contract release processes for purchasing contracts.
- Access related links for supplier contracts.

See Also

Chapter 13, "Managing Document Life Cycles," Creating Ad Hoc Documents and Ad Hoc Contracts from Purchasing Contracts and Purchase Orders Using Document Management, page 485

Understanding Supplier Contract Management Transactional Purchasing Contract Definition (Contract Entry)

PeopleSoft Supplier Contract Management provides easy access to contracts, enabling you to maintain transactional contract information and at the same time interface with the document authoring system. The transactional purchasing contract is a part of the overall PeopleSoft Procurement system that includes integrations with strategic sourcing and requests for quotes (RFQs) for contract creation. You can also create contract documents that use transactional purchase orders as the source transactions. These contracts use the same clause library elements as the transactional contract-based contracts and also provide life-cycle processing and approvals.

You use supplier contract pages to perform Purchasing tasks for the contract, such as creating the contract, adding line items, and releasing contract quantities. Most features in the transactional purchasing contract and the purchase order contract document in the Purchasing application are also in PeopleSoft Supplier Contract Management's Contract Entry component. And if, before you installed the Supplier Contract Management application, you had used the Add/Update Contract component in PeopleSoft Purchasing to add contracts, those contracts are now available in the Contract Entry component of Supplier Contract Management.

In addition to performing traditional sourcing and purchasing transactions for a contract using Supplier Contract Management, you use the application to perform tasks unique to supplier contracts. Using the application, you can:

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- Access the document authoring system, where you can create and maintain related purchasing and ad hoc Microsoft Word documents.
- Manage the life cycle of authored document statuses, versions, and amendments.
- Define contract agreements (deliverables) at the contract header level and at its line-item level so that the system uses the related clauses in authored documents.
- Update and monitor contract header and line agreements to ensure compliance with the transactional contract.
- Use transactional metrics to track and analyze supplier performance.
- Syndicate transactional contracts to remote systems.
- Notify buyers when contracts expire, exceed their maximum monetary amount, or exceed their maximum spend threshold monetary amount.

Common Elements Used in This Chapter

Contract Version	Contract versions refer to the revision of a purchasing contract transaction. This functionality provides you a method to revise the transactional contract as a new draft version while the prior version of the transactional contract is still active within procurement.
Contract Document	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.
Document Version	A separate version control feature provided within PeopleSoft Supplier Contract Management for authored contract documents. This feature enables you to create new versions of the contract document independent of the transactional contract.
Transactional Purchase Order	A purchase order against which you can perform transactions such as adding items or update pricing. You create and maintain transactional purchase orders within PeopleSoft Purchasing or Supplier Contract Management systems.
Transactional Purchasing Contract	A contract against which you can perform transactions such as create and maintain contract items, amounts, dates, and prices. You can create and maintain transactional contracts within PeopleSoft Purchasing or Supplier Contract Management systems.
Purchase Order Source	Purchase order contract documents enable you to author contract documents based on PeopleSoft Purchasing purchase orders and express purchase orders as the source. This is an alternative to using the transactional purchasing contract as a source.
Purchasing Contract Source	Purchasing contract source documents enable you to author contract documents using a PeopleSoft Purchasing transaction purchasing contract as the source.

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Request for Quote	A PeopleSoft Strategic Sourcing feature where you request suppliers to bid on an event such as pricing for an item. You can use request documents to capture basic information about the request that you can eventually use in a contract document.
Sourcing	A generic term that includes PeopleSoft Strategic Sourcing events and requests for quotes.
Strategic Sourcing Event	A PeopleSoft Strategic Sourcing event is when you provide bidders an overall description of the event at the header level, with item-specific details at the line level. You can create events for purchase orders, requisitions, contracts, engineering and manufacturing bills of material, and planned orders.

Creating Purchasing Contracts (Contract Entry)

This section discusses how to:

- Define supplier contract information.
- Add contract line information.
- Create supplier contract releases.
- Review supplier contract releases.
- Access syndication features.

Pages Used to Create Purchasing Contracts

Page Name	*Definition Name*	*Navigation*	*Usage*
Contract	CNTRCT_HDR	Supplier Contracts, Create Contracts and Documents, Contract Entry, Contract	Create supplier contract information.
Create Releases	CNTRCT_SCHEDULE	Supplier Contracts, Create Contracts and Documents, Contract Entry, Create Release	Create supplier contract release information.
Review Releases	CNTRCT_RLS_HIST	Supplier Contracts, Create Contracts and Documents, Contract Entry, Create Releases Select the Review Releases tab on the Contract Releases page.	Review supplier contract release information.

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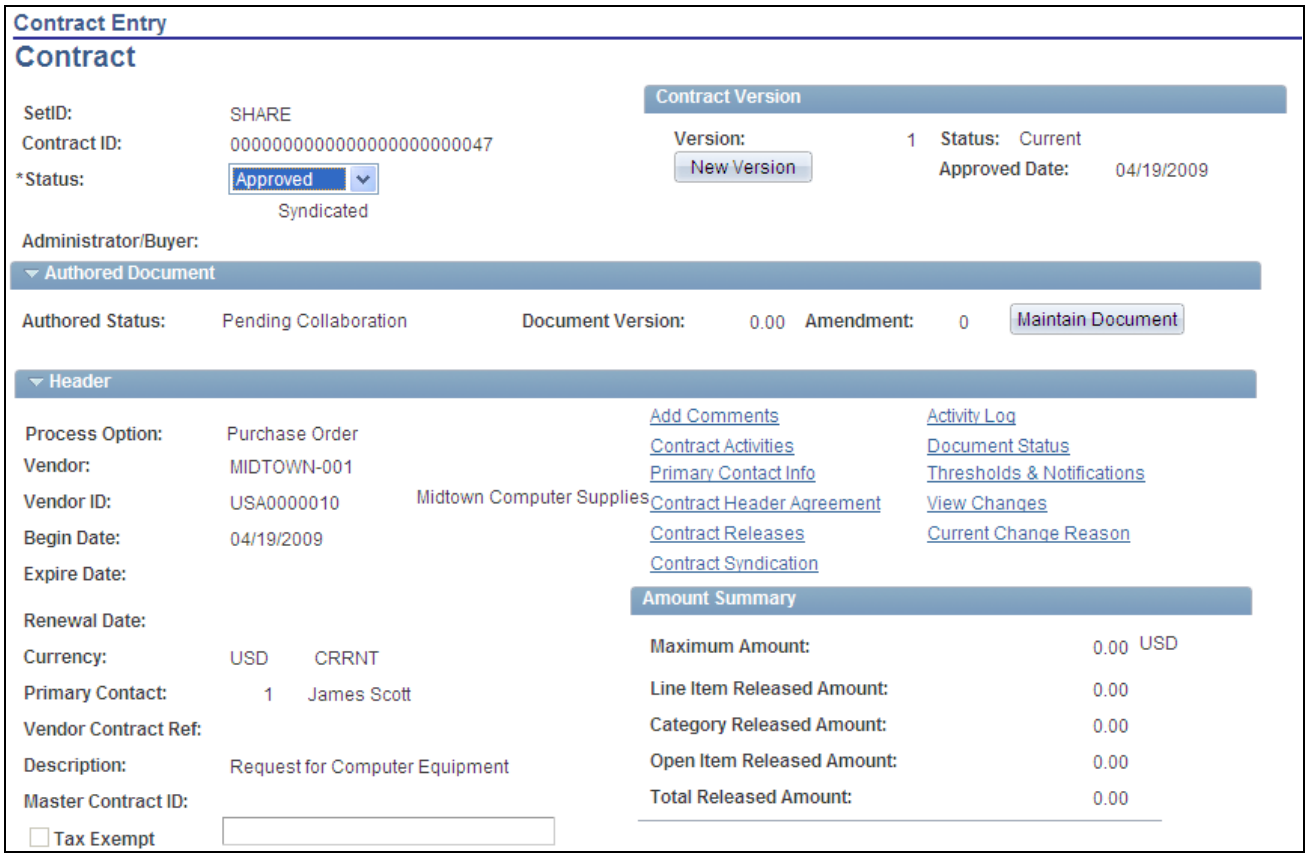
Page Name	Definition Name	Navigation	Usage
Syndication	CS_CNTRCT_SNDCT	Supplier Contracts, Create Contracts and Documents, Contract Entry Click the Contract Syndication link on the Contract page.	Access syndicating features.

Defining Purchasing Contract Information

Access the Contract page (Supplier Contracts, Create Contracts and Documents, Contract Entry).



Contract page (1 of 2)

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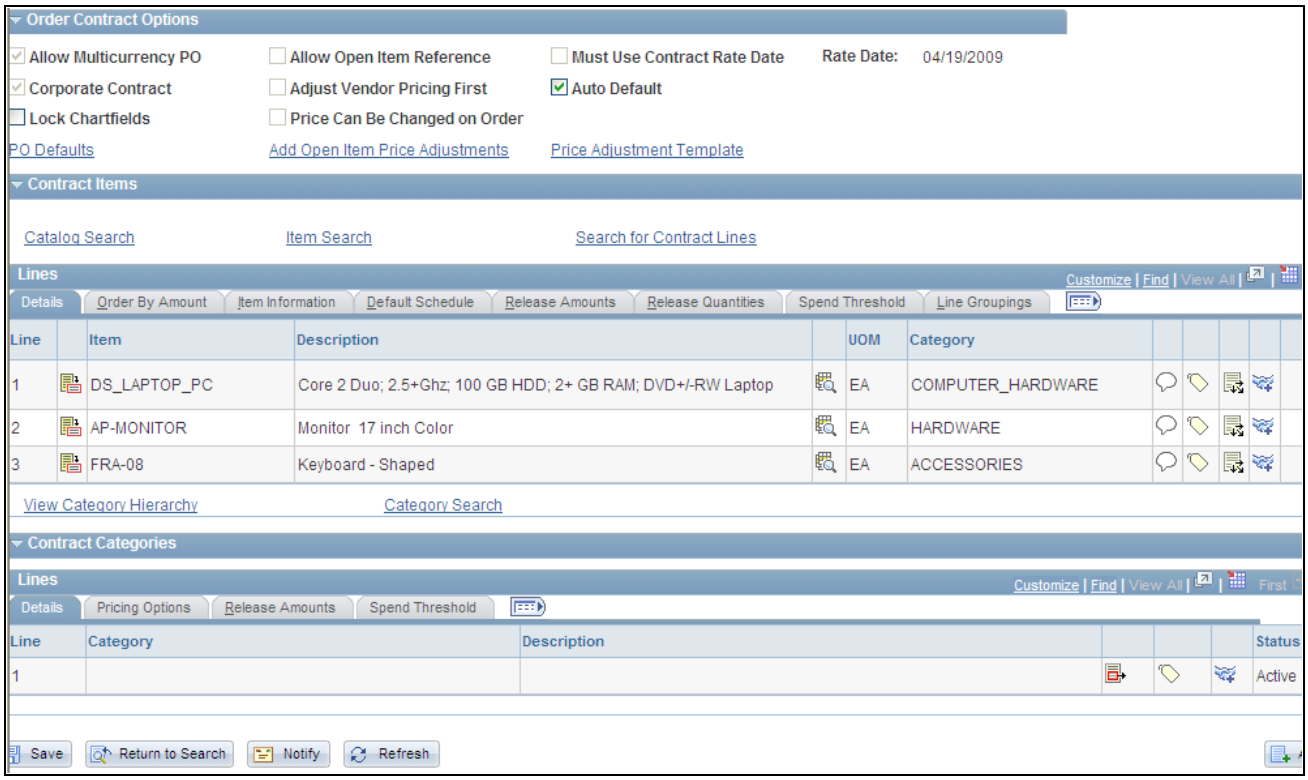

Contract page (2 of 2)

Use the Contract page to enter header and line information for the transactional purchasing or voucher-based contracts. When you add a contract, the system uses the contract process option type to determine the functionality for the transactional contract.

This section describes additional fields and options that are available when you use the Contract Entry and Add/Update Contract components and have PeopleSoft Supplier Contract Management installed. Most of the documentation for defining and using transactional purchasing contracts is in the "Using Voucher and Order Contracts" chapter in the *PeopleSoft Enterprise Source-to-Settle Common Information PeopleBook.*

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Using Voucher and Order Contracts."

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Status Select the status of the contract. Values are: *Approved,Canceled, Closed, On-Hold,* and *Open.*

When you create a contract, the status appears by default as either Open or Approved based on the settings for the user on the User Preferences - Contracts page. Only contracts with an Approved status are eligible to have releases created against them or to be referenced by other transactions. You can only change contracts in Add mode or if they are in an Open status.

You cannot set the status to *Closed* or *Canceled* if open lines or staged releases exist against the contract. If a contract's status is returned to *Open,* you cannot use purchase orders that reference the contract until the contract is approved again. When vouchers exist for a contract and the contract is closed, all vouchers eligible for closure are also closed.

Eligible vouchers include those that have not been posted, paid, matched, or budget checked. If the contract is reopened later, you can create releases for these vouchers again and the system will assign a new voucher ID. If the contract originated from a request for quote and the contract is canceled, you have the option to return quantities to the request for quote.

Add a Document After you save the Contract Entry page, click this button to access the PeopleSoft Supplier Contract Management document authoring system, where you can create a document and link it to this transactional contract. This document is different than the PeopleSoft Purchasing document inquiry, which enables you to cross-reference documents, such as requests for quotes, or requisitions that are associated with a purchase order.

If a document already exists for the contract, click the Maintain Document button to access the document.

Contract Version

You use this section to manage and review versions of a contract.

PeopleSoft Supplier Contract Management has two version capabilities. Purchasing contract versions refer to the revision of the purchasing contract transaction (Contract Entry). 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 PeopleSoft Purchasing. A separate version control feature is provided within Supplier Contract Management for contract documents which enable you to create new versions of the contract document independent of the transactional contract. For example, you can create just a document amendment with or without any version required to the transactional contract or visa-versa.

Note. When you create or refresh a document within PeopleSoft Supplier Contract Management document management that ties (binds) into the transactional contract, then the system uses the most recent version of the transactional contract to resolve transactional contract bind information.

Purchasing contract versions are only available if the Use Version Control check box is selected on the Contract and Vendor Rebate Controls page. To access the page, select: Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Set Controls-Contracts.

To create a new contract version, you must have the authority to create the version. The authority is established by selecting the Enter Contracts/New Version check box on the Contract Process page. To access the page, select: Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, select a user, click Procurement, Contract Process.

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Note. The system tracks contract versions for purchasing contracts and Supplier Contract Management contract documents. The version status for purchasing contracts is tracked using the Contract Version section. The version for supplier contract documents is tracked using the Document Version section.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Defining Procurement Options," Setting Contract and Vendor Rebate Controls.

Authored Document

Use this section to view and manage authored documents associated with the contract. This section appears on the Contract Entry page after you create a document for a transactional contract. You click the Add a Document button to create the document.

Authored Status Displays the current document status. Values are:

Draft: The document has been generated and is in an initial Draft status. The system displays the latest version of the draft.

In Collab (pending collaboration): The document has been routed for collaboration, but all collaborators have not responded.

Collabed (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.

Pending (pending approval): The document has been routed using workflow approval.

Approved: The current document has been approved internally and is available for supplier dispatch for final signatures and execution.

Dispatched: The current documents have been dispatched to the supplier and are waiting for final signatures.

Executed: The current document has been executed. 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 *Draft* and the amendment number is shown. Previous versions, including current executed contract, can be viewed by clicking the Maintain Document button.

Pending Review (collaborated, pending review): The document has been reviewed by all collaborators and is awaiting a final review by the document administrator or owner.

Note. The authored status and transactional contract status are independent of each other because the timing of changing a transactional contract and the document life cycle are different.

The system does not update the authored status on the Contract page until the page is closed and reopened.

Version Displays the current version of the document.

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Amendment Displays the current amendment number for the contract. A document amendment is an update to an existing executed document and is a feature in Supplier Contract Management.

See Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," page 679.

Maintain Document Select to access the contract document associated with this contract. If a document does not yet exist for the contract, the system displays the Add a Document button.

See Chapter 13, "Managing Document Life Cycles," page 463.

Header

Use this section to define basic information for the contract. The system uses the contract process option type to determine the functionality for the transactional procurement contract. This section describes only the differences between the Supplier Contract Management Contract Entry page and the standard functionality of the Add/Update Contract component in the Purchasing application.

For detailed information about the transactional procurement contract functionality, use this link:

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook,* "Using Voucher and Order Contracts," Creating Contract Headers.

Administrator/Buyer Select the administrator or buyer that the system uses as a default value for the authored document when it generates the document.

Dispatch Method This field and the corresponding Dispatch button are not available in the Supplier Contract Management Contract Entry component. Dispatching is a part of managing the document life cycle.

See Chapter 13, "Managing Document Life Cycles," Dispatching Documents, page 564.

Contract Header Agreement Click this link to access the Contract Header Agreement Assignments page, where you can establish agreements for the contract. Contract agreements represent external or internal deliverables. You can assign agreements at the header level or at the line-item level. Use this link to assign header-level agreements.

Click the Contract Agreement button in the Lines grid area to add contract agreements for individual items at the line level.

See Chapter 4, "Defining Contract Agreements," Assigning Contract Header Agreements, page 99.

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Contract Syndication Click to access the Contract Syndication page where you can set up a contract for syndication by defining the nodes to which the contract can be syndicated and to publish the contract. You can also view the syndication status, update syndication options, and review summary release information for purchase order contracts. To make the Contract Syndication tab available, make sure that the installation options are defined to enable contract syndication.

See Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," page 157.

View Changes Click to view contract change history when contract changes are being tracked.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Using Voucher and Order Contracts," Viewing Contract Change History.

Order Contract Options

This section displays values that apply to general, purchase order, recurring purchase order voucher, and release to single purchase order only contracts.

Voucher Contract Options

This section displays values that apply to general, prepaid voucher, prepaid vouchers with advance purchase order, recurring vouchers, and recurring purchase order voucher contracts.

Advanced PO Information Section

Use this section to enter information when the process option type of the purchase order is for prepaid vouchers with advance purchase orders.

Purchase Order Information

Use this section to enter information when the process option type of the purchase order is for releasing to a single purchase order and recurring purchase order vouchers.

Contract Items

Use links in this section to access other methods for adding items to the contract lines. Click the Catalog Search link to access the Order by Catalog page. You can add items to the contract from the catalog.

Click the Item Search link to access the Item Search Criteria page, where you can define attributes for locating items.

Click the Search for Contract Lines link to expand this section so that you can define search criteria for contract lines and retrieve specific contract line information.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Using Voucher and Order Contracts," Searching for Contract Lines.

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Contract Categories

Use this section to define information for contract categories and line items, including item adjustments, exclusions, and category agreements.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Using Voucher and Order Contracts," Defining Contract Category Lines.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Using Voucher and Order Contracts," Creating Contract Headers

Adding Contract Line Information

Access the Details tab in the Lines grid.

Use this grid area and its tabs to define items you want to include in the contract. Along with items, you define a variety of details, including schedules, release amounts and quantities, and item details.

Using the PeopleSoft Supplier Contract Management application, you can also assign agreements for contract line items. Contract agreements represent external or internal deliverables. Click the Contract Agreement button in the Lines grid area to add contract agreements for individual items at the line level. The button is represented by a blue hand-shake symbol.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Using Voucher and Order Contracts," Creating Contract Line Information.

Adding Contract Category Information

Access the Details tab in the Lines grid in the Contract Category section.

Use this grid area and its tabs to define categories you want to include in the contract. Contract categories enable you to specify groups of items on a contract, rather than having to enter the items one at a time. Using contract categories, you can add categories to a contract along with item exclusions, upper and lower limits, and price adjustments. When you create requisitions and purchase orders, the system locates and verifies that it uses the appropriate contracts automatically. You can use categories in conjunction with contract lines and open items, but you cannot create contract releases using category contracts.

Along with categories, you define a variety of details, release amounts, and category details. Using the PeopleSoft Supplier Contract Management application, you can also assign agreements for contract categories. Click the Contract Agreement button in the Lines grid area to add contract agreements for individual categories at the line level. The button is represented by a blue hand-shake symbol.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Using Voucher and Order Contracts," Setting Up Contract Categories.

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Reviewing Supplier Contract Releases

Access the Review Releases page (Supplier Contracts, Create Contracts and Documents, Contract Entry, Contract Releases, select the Review Releases tab on the Contract Releases page).

Use this page to view the staged purchase order and voucher releases for this contract. You can also make changes to the staged releases.

The Review Release tab does not appear if the contract process option type is not a purchase order type and the contract is syndicated. The system prevents releases from the parent system against contracts that use the other process option types.

Accessing Syndication Features

Access the Syndication page (Supplier Contracts, Create Contracts and Documents, Contract Entry, and click the Contract Syndication link on the Contract page).

Use this page to syndicate contracts to remote systems. If the Syndication page doesn't appear, use installation options to indicate that syndication should be enabled. To access the options, select: Supplier Contracts, Supplier Contract Setup, Installation Options, Supplier Contract Management.

See Also

Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," page 157

Adding Purchasing Contract Documents

This section provides an overview of purchasing contract document creation and discusses how to:

- Create purchasing contract documents.
- Copy existing purchasing contract documents.
- Adding requisition documents and wizard responses.

Understanding Purchasing Contract Document Creation

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 transactional purchasing contract (Contract Entry). This section describes how you add and copy procurement contract documents.

Note. Tasks described in this section are similar to many of those described in the "Managing Document Life Cycles" chapter which describes the creation of both purchasing contracts and ad hoc source documents. You should also refer to that chapter for many of the details for adding, copying, and importing documents.

See Chapter 13, "Managing Document Life Cycles," Adding Authored Documents, page 482.

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Purchasing Contact Document Creation

You can create a document for a purchasing contract from within the Contract Entry component by clicking the Add a Document button on the Contract page. You can create a document for a contract as long as a document does not exist. After creating the document, you can maintain it from within the Document Management component, which is also accessible from the Contract Entry component.

To create a purchasing contract document:

1. Select Supplier Contracts, Create Contracts and Documents, Contract Entry.

   Enter contract information and save the contract.

2. Click the Add a Document button on the Contract page.

   The system displays the Create Document page 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 purchasing contract document. This enables you to copy forward any appropriate requisition-document wizard responses that you want to be used as default value responses in the purchasing contract document wizard. Any matching responses, based on wizard variables between the requisition request document wizard and the wizard associated with the configurator of the contract document, are copied forward as default values for the contract specialist.

   This process is described in the Adding Requisition Documents and Wizard Responses section.

   See Chapter 3, "Defining Supplier Contracts," Adding Requisition Documents and Wizard Responses, page 53.

   Note. If you do not access the contract through the Contract page, you can use the Document Management page to access the Add a Document page. Using this page, you select *Purchasing Contract* as the contract type, then select the contract to which you want to add a document. You must create the purchasing contract before adding the document.

   ---

3. Enter basic information about the contract.

   If you are using document types, you can further refine the document's structure by selecting a document type. Also, instead of creating a document, 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 page.

   ---

4. Click the Create Document button.

   The Document Management page appears with the document in a Draft status.

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Purchasing Contact Document Copying

When you copy a transactional contract using the Contract Entry component, the system provides an option to copy the latest document along with the copied transactional contract. In this case, the new contract document maintains most of the copied content and edits, but in addition, the system runs a Refresh process to replace any old bind variables, such as vendor information or list of items, from the old contract with new values from the new contract created using the Contract Entry component.

Note. The option to copy the latest document along with the copied transactional contract is not available when using the Batch copy method.

Note. If you are using document types, the system creates the new contract with the same document type as the original contract document.

When you copy a contract, and a document exists for the contract that you are copying from, 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 at this time. If you want to copy the document later, use the process described in the Copying Ad Hoc or Purchase Order Contract Documents Using Document Management section.

See Chapter 13, "Managing Document Life Cycles," Copying Documents Using Document Management, page 493.

To copy a purchase order contract document:

1. Determine the requirements of the contract that you want to create and locate an existing contract with similar requirements.

   Ensure that the contract is the same type of contract that you want to create, such as a general order or purchase order contract, has already had a document created for it, and that the document uses the same document type that you want to use to create the contract document.

2. Create the contract by selecting Supplier Contracts, Create Contracts and Documents, Contract Entry, and select the Add a New Value tab.

   Ensure that the contract you are copying is the same type as in the Contract Process Option field.

3. Click the Add button.

   The Contract page appears.

4. Click the Copy from Contract link.

5. Complete the search criteria, and click the Search button.

   The results of the search appear in the Select Contract grid box.

   Note. You must select a contract from the results list to enable the system to copy a contract. If you enter a contract ID without performing a search, you can create a new contract, but the system does not provide you the opportunity to copy its document.

   ---

6. Select the contract that you want to copy, and click OK.

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7. Update the contract information, and click the Save button.

   The system displays a prompt page indicating that a document exists with the original contract and prompts you to copy the contract document or create the document from a configurator or by copying the document later.

8. Click the Yes button.

   The Create Document page appears.

9. Enter a document description, and click the Create Document button.

   The document description is a default value from the transactional contract, and is required, so if you do not enter a value on the transactional contract, then you must enter it on this page. The system creates the document by copying the original contract and attempts to keep all original edits for any content not replace due to the refresh process, then updates any bind values from the new transactional contract.

Note. The copied contract is now considered to be the baseline contract for any future deviation reporting against this newly copied contract.

Using Wizard Responses from Requisition Documents

Purchase order documents and purchasing contracts can originate through a requisition process. Before creating either document using this process, requesters can define information that will eventually be available for use with the contract document. Using requisition documents, requestors can define a related document and wizard responses to capture additional information for 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 when you create the contract document. In addition, you can relate the requisition document to the contract document when you create the contract document.

When you set up a document type to use only with a purchase order requisition, you can specify that the system use this type when a requestor creates 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.

Using wizard responses, the requestor can 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 make use of any wizard responses within that request document to help drive the content and fill in 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, in turn, copies the wizard responses for the requisition document as default values for the new contract document wizard responses.

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 define for 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 the current generated document back to the requisition along with your comments. Attaching the document back to the requisition is at a point in time, and the system does not automatically reattach any further changes to the requisition document.

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Requisition documents are based on document types that enable the use of a purchase order requisition to create the a purchase order or purchasing contract document. Documents of this type must be associated with a requisition ID and business unit. You use Supplier Contract Management installation options to set the use of document types and purchase requisitions. Because requisitions are dependent on a document type, you must set the system to use document types, then you can select to use document types with purchase requisitions. As part of the setup, you define a wizard that captures additional information for the requisition and that can be used later in the purchase order contract.

Use these steps to add a requisition document:

1. Ensure that these Supplier Contract Management installation options are selected:

   - Use Document Type.
   - Use with PO Requisition.

2. Establish question groups and wizards for use 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 in Supplier Contract Management. This page appears with the business unit and 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. Optionally, click the Attach to Requisition button in the Document Management page and enter your comments about the document.

   This attaches the current document along with your comments to the requisition similar to you 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 one time.

After you create a requisition document, you can update the responses to the wizard using the Modify Request Document button from within PeopleSoft Purchasing or eProcurement requisitions.

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See Also

Chapter 3, "Defining Supplier Contracts," Adding Requisition Documents and Wizard Responses, page 53

Pages Used to Add Purchasing Contract Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Contract	CNTRCT_HDR	Supplier Contracts, Create Contracts and Documents, Contract Entry	Create purchasing contract documents.
Create Document	DOC_CREATE	Supplier Contracts, Create Contracts and Documents, Contract Entry Click the Add a Document button on the Contract page.	Create purchasing contract documents.
Copy Document	CS_DOC_COPY_SEC	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.	Copy purchasing contract documents to create a new document.
Maintain Requisitions	REQ_FORM	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.	Add requisition documents.
Create Requisitions	PV_REQ_HDR_DEFAULT	eProcurement, Requisitions, Create Requisitions Create and save a requisition, then click the Add Request Document button.	Add requisition documents.

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Page Name	Definition Name	Navigation	Usage
Edit Requisitions	PV_REQ_FORM	eProcurement, Manage Requisitions Select to edit a requisition that already has a requisition document, then click the Modify Request Document button on the Edit Requisition page.	Add requisition documents.

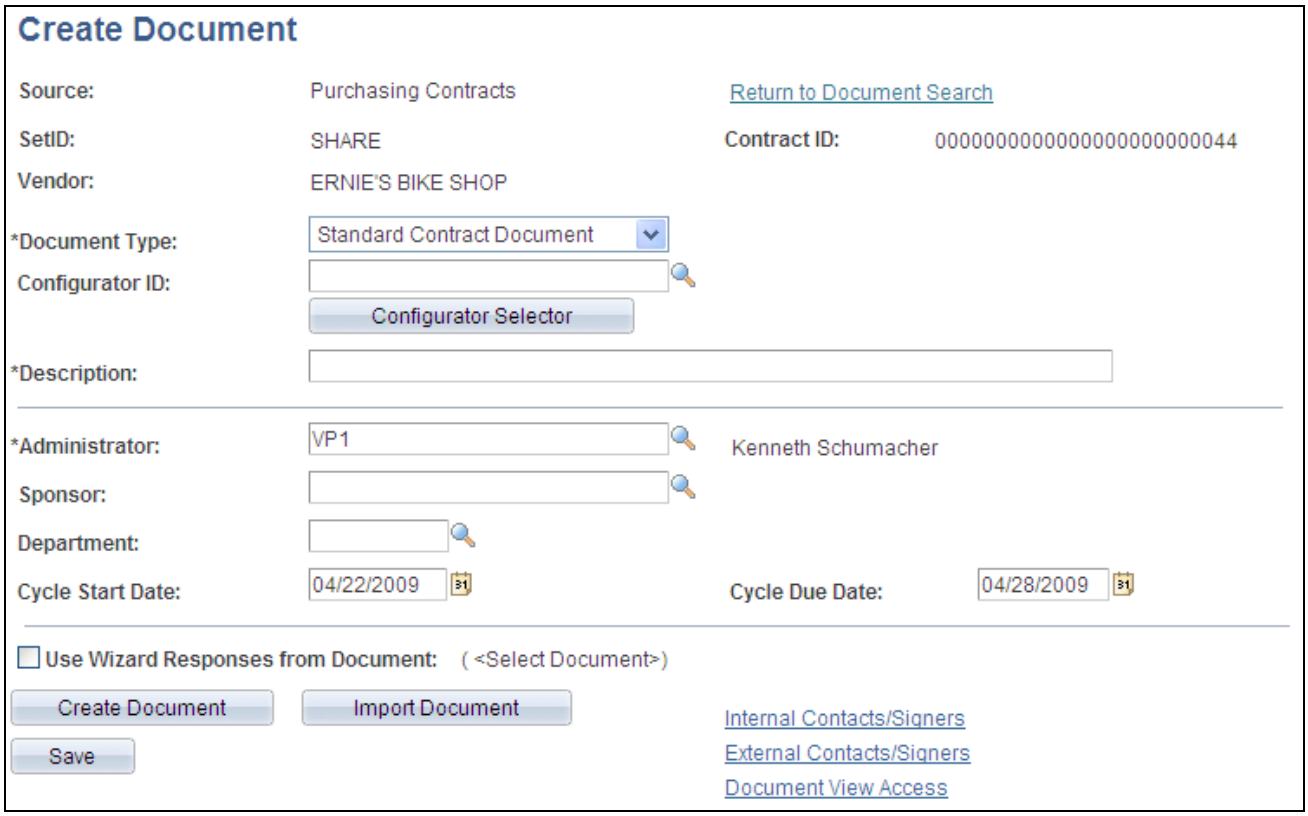
Creating Purchasing Contract Documents

Access the Contract page (Supplier Contracts, Create Contracts and Documents, Contract Entry).

Use this page to create a document for a purchasing contract from within the Contract Entry component. 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.

Select a document administrator in the Administrator field. Administrators must be defined using the User Preferences page. Click the Add a Document button to create the purchasing contract document.

The Create Document page appears.



Create Document page for a purchasing contract

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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.

Select a purchasing contract document type in the Document Type field. 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 set for use on the Installation Options page. When you select a document type, the Configurator ID field appears depending on how the document type is defined.

If the document type uses a specific configurator, that configurator becomes the default value. If you have been authorized to override configurator values on the User Preference page, you can change this value. If not, you cannot change the value.

If the document type uses a configurator selector wizard, click the Configurator Selector 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.

Description Enter a description for the purchasing contract document. The Description field is required to create the document.

Use Wizard Responses from Document Select to use responses from wizard responses contained in another document. This saves you time in responding to questions and also enables you to change answer when needed. When you select this value the Import Document button is low-lighted.

Select Document Click to access search criteria for locating another purchasing contract document that contains responses for this wizard.

Create Document Click to launch the document generation process. If you are using a document creation wizard with the contract, the system launches the wizard.

Import Document Click to import a legacy purchasing contract document.

See Chapter 11, "Importing Clauses, Sections, and Documents," Importing Contract and Ad Hoc Documents, page 425.

See Also

Chapter 13, "Managing Document Life Cycles," Adding Authored Documents, page 482

Copying Existing Purchasing Contract Documents

Access the Create Document page (click the Add a Document button on the Contract page).

When you save the newly copied purchasing contract, 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 also. 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.

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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 is similar to ad hoc and purchasing contract document creation from the Document Management component.

Adding Requisition Documents and Wizard Responses

Access a requisition page (Purchasing, Requisitions, Add/Update Requisitions, and 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).

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 also exists for requisitions created using PeopleSoft eProcurement requisition pages. Using the links, you can access the document authoring system where you can select a document type and launch a wizard for use with the requisition. You can apply requisition request documents to both purchase order documents and to purchasing contracts. After you finish the wizard questions, the system creates the document using your responses. You can also modify the document using requisition pages in Purchasing and eProcurement.

See Chapter 3, "Defining Supplier Contracts," Understanding Purchasing Contract Document Creation, page 45.

To maintain the 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 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.

Note. 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 within either eProcurement or Purchasing, the Add a Document page appears along with the requisition ID and business unit.

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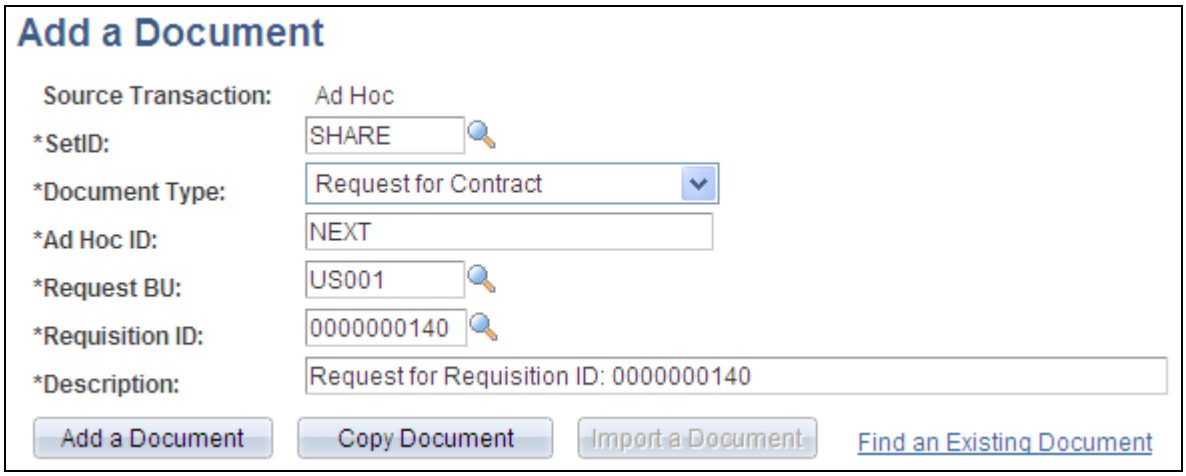

Add a Document page for purchasing requisition documents

Use this page to add a document for a PeopleSoft Purchasing or eProcurement requisition request. The page appears with most of the fields populated using default 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 starting from within 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 Chapter 13, "Managing Document Life Cycles," Creating Ad Hoc Documents for Requisitions Using Document Management, page 491.

Document Type 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 Use Only with PO Requisitions check box selected on the Document Type page.

Ad Hoc ID Enter an ad hoc ID. If you setup the document type to use automatic numbering, *NEXT* appears in the field. When you click the Add a Document button, the system automatically assigns a number.

Add a Document 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 Create Document button to create the requisition document.

Copy a Document Click to copy a document.

See Chapter 3, "Defining Supplier Contracts," Copying Existing Purchasing Contract Documents, page 52.

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Adding Purchase Order Contract Documents

This section provides an overview of purchase order contract documents and discusses how to add purchase order contract documents.

Understanding Purchase Order Contract Documents

Purchase order contract documents enable you to author contract documents based on purchase orders and express purchase orders as an alternative to using the Transactional purchasing contract as a source. This functionality is intended for customers not using purchasing contracts, but who still 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 into the purchase order data and author a document using content from the clause library. In environments where the purchase order transaction is solely being used as an alternative to the transactional contract, this feature provides you an optional authoring capability 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 component by selecting the Purchase Order source transaction and selecting a purchase order ID. Before you can create a purchase order contract document, you must set PeopleSoft Supplier Contract Management installation options to enable transactional sources for purchase orders.

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:

- The use of a related request document tied to requisitions to capture wizard responses for use with a purchase order contract document that you create later.

  See Chapter 3, "Defining Supplier Contracts," Adding Requisition Documents and Wizard Responses, page 53.

- When using PeopleSoft Strategic Sourcing, you cannot award events to a purchase order that have 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.

- Verity searches that use purchase order search criteria and reports that provide purchase order-based contract information.

  See Chapter 14, "Searching for Library and Document Contents," Purchase Order Attributes, page 615.

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- Supply-side access to source transaction documents for purchase orders.

  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 Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Reviewing and Collaborating on External Documents, page 133.

- Version control for purchase order documents.

  Note. Documents that you create or refresh from purchase orders are always based on the latest updates to the purchase order itself. This is the original purchase order or any change orders that have been applied to the purchase order.

- The use of purchase order workflow, document management workflow, or both.

  Depending on organizational requirements, you can configure the system to use the PeopleSoft Approval Framework for purchase orders and documents within PeopleSoft 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.

- The copying of 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 *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Orders Online," Entering Purchase Order Header Information.

- The dispatch of attachments for purchase order documents.

  As with the transactional purchase contract, you can optionally dispatch (email) related purchase order attachments along with the authored document within PeopleSoft Supplier Contract Management.

  See Chapter 13, "Managing Document Life Cycles," Dispatching Documents, page 564.

Purchase Order Contract Document Validations

When you create a purchase order document, the system validates that the purchase order is appropriate to have a document tied to 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 if:

- 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.

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- A 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 vendor- 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 against a PeopleSoft Services Procurement-related work order.

  If the purchase order is related 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.

  For subcontracted purchase orders, it's more likely that the contract is already established prior to subcontracted purchase orders being created automatically from the production ID within manufacturing.

- The purchase order is a drop-ship order.

  In this case, it's not likely that the purchase order is a contract. You create drop-ship purchase orders using PeopleSoft Order Management. If the purchase order is going to be contract-related, you should use the purchasing transactional contract at the line level for contract authoring.

- The purchase order is for stockless or consigned items.

  It's likely that these types of purchase orders are not contract-related or might already have a purchasing transactional contract.

Purchase Order to Authored Document Status Mappings

As part of managing the statuses of purchase orders with the statuses of the authored document, the next table provides general guidelines for the purchase order versus authored document statuses. As is with the transactional contract, the system enables two statuses to function independently to support the need for various transactional related processing independent from authored document and signatures. The mappings include:

Purchase Order Status	*Status Description*	*Typical Authored Status*	*Comments*
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.	

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Purchase Order Status	Status Description	Typical Authored Status	Comments
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.

See Also

Chapter 2, "Understanding PeopleSoft Supplier Contract Management," Transactional Purchase Orders, page 11

Pages Used to Add Purchase Order Contract Documents

Page Name	Definition Name	Navigation	Usage
Add a Document	CS_DOC_ADD	Supplier Contracts, Create Contracts and Documents, Document Management	Define creation details for a contract document. Select *Purchase Order* in the Source Transaction field to add a purchase order document
Create Document	CS_DOC_CREATE	Supplier Contracts, Create Contracts and Documents, Document Management Click the Add a Document button on the Add a Document page.	Add purchase order documents.

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Page Name	Definition Name	Navigation	Usage
Create Document	CS_DOC_CREATE	• 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.	Add purchase order documents.
Create Document	CS_DOC_CREATE	• 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.	Update purchase order documents. After creating a purchase order document, you can manage its life cycle the same as other authored documents in the document authoring system. See Chapter 13, "Managing Document Life Cycles," page 463.

Adding Purchase Order Documents

Access the Create Document page (Supplier Contracts, Create Contracts and Documents, Document Management).

This page is similar to the page that you use to add the purchasing transactional contract, but the fields relate to purchase orders.

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Source Transaction Select the *Purchase Order* source to either 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.

Business Unit Select the business unit in which you want to locate a purchase order.

Document Type Select the document type that you want to use to create the purchase order document. Only document types that were created for use with purchase order contracts appear in the list of values.

PO ID 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 either add a purchasing contract document or search for an existing purchasing contract document.

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 the purchase order could have lines pointing to multiple transactional purchasing contracts.

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.

See Also

Chapter 3, "Defining Supplier Contracts," Creating Purchasing Contract Documents, page 51

Setting Up Spend Thresholds and Running Contract Alert Workflows for Purchasing Contracts

This section provides an overview of spend thresholds and contract alerts and discusses how to:

- Define contract header spend thresholds.
- Define contract line item spend thresholds.
- Define contract category line spend thresholds.
- Run contract alert workflow processes.

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Understanding Spend Thresholds and Contract Alerts

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 transactional 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.

An example of using a spend threshold might be when a contract includes a line item that has a price discount based on meeting specified spending thresholds over the life of the contract. The line amount might be initially set at 100,000 USD representing an estimated amount of business the buyer expects to do under that contract for the year. The base price of the item is 10.00 USD.

The supplier has agreed that after the buyer purchases more than 80,000 USD worth of the item under that contract (8,000 units), the price of the item will decrease to 9.00 USD each. The buyer knows that he is going to buy more widgets next year when he renews the contract. As the contract nears expiration, the buyer wants to know if he is approaching the 8,000 unit discount trigger so that he can accelerate purchases to take advantage of the lower price. He sets up a workflow notification to notify him when contract spending on that line item reaches and exceeds 75,000 USD.

The spend threshold is available at the contract header, contract line, and contract category levels. The notification is a standard PeopleSoft workflow event that is triggered through the application engine program.

In addition to the worklist, the system can email notifications. Email notifications are triggered using the same conditions as workflow notifications. The decision to create a worklist, send an email, or to do both depends on the user-profile workflow-routing preferences.

A single notification is sent when the amount reaches the threshold. If you change the spend threshold amount on the header or any lines, the system deletes any existing notifications on the header or the changed lines and reevaluates the threshold when you run the application engine job again. This action enables you to keep increasing the spend threshold amounts and to be further notified as necessary.

If you are using a worklist, you can select a link to go to the Contract Entry component. If the notification is triggered by a line amount, the page displays that line in red above the line grid. If you change the threshold amount when accessing the page through the worklist, the system deletes the existing notification. You can also set the worklist entry to *Mark Worked.* This value does not delete the existing worklist entry; rather, it makes the entry invisible to the user.

To set up the system to process contract-level spend threshold amounts:

1. Access the Contract page.
2. Click the Thresholds & Notifications link.
3. Select the Send Threshold Notification check box.
4. Define the threshold amount.

   Note. The system also tracks the released amounts on the Thresholds & Notifications page.

5. Select the notification type and at least one user to whom you want to send notifications.

   Use the Notification Assignments grid to make these selections. Examples of notification types include maximum amount, renew, and draft due notifications.

6. Click OK.

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You can set up spend threshold amounts for both the contract along with line items or category lines, or you can use just the line-item or category-line spend threshold to trigger workflow events for a particular item or category on a contract.

Note. The system notifies the user IDs that appear with the notification type of *Spend* in the Notification Assignments grid on the Thresholds & Notifications page for contract header, line-item, and category levels.

To set up the system to process line-item or category-level spend threshold amounts:

1. Access the Contract page.
2. Select the Spend Threshold tab for either the contract lines or category lines.
3. Select the Notify on Spend Threshold check box and enter spend amounts.
4. Click Save.

   While you don't have to use the Thresholds & Notifications page to define line items, the contract totals for released line amounts appear on the page.

Pages Used to Set Up Spend Thresholds and Run Contract Alert Workflows for Purchasing Contracts

Page Name	*Definition Name*	*Navigation*	*Usage*
Thresholds & Notifications	CNTRCT_NOTIFY_SEC	Supplier Contracts, Create Contracts and Documents, Contract Entry Click the Thresholds & Notifications link on the Contract page.	Define Contract Header Spend Thresholds.
Contract	CNTRCT_HDR	Supplier Contracts, Create Contracts and Documents, Contract Entry Select the Spend Threshold tab in the Lines grid on the Contract page.	Define contract line item spend thresholds.
Create Contract Alert Workflow	CS_CNTRCT_ALERT_WF	Supplier Contracts, Create Contracts and Documents, Contract Alert Workflow	Run contract alert workflows to support spend threshold notifications.

Defining Contract Header Spend Thresholds for Transactional Contracts

Access the Thresholds & Notifications page (Supplier Contracts, Create Contracts and Documents, Contract Entry, Contract, and click the Thresholds & Notifications link on the Contract page).

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Use this page to set the spend threshold amount and the number of days before the contract expiration to notify the buyer or administrator. Also use this page to send notification that the contract maximum is exceeded and specify which buyer to notify. The system uses this information as a business process for setting up PeopleSoft PeopleTools workflow to route notifications to buyers when the contract limits have been met. This page is not used by voucher contracts.

Send Date/Amount Notification Select this check box to notify the identified buyer when a contract expires or reaches the maximum amount on the contract.

Send Threshold Notification Select this check box to notify the buyer when a contract reaches or exceeds the spend threshold.

Date Notification

Use this section to define expiration notification information.

Expire Date This field appears by default from the Contract page, or you can enter the expire date on this page and the system will update the expire date on the Contract page.

Notify Days Before Expires Enter the number of days before a contract expires that you want the system to notify the buyer.

Expiration Notification Date The system determines and displays the expiration notification date. When a contract reaches this notification date, the system notifies the identified buyer that the contract is about to expire. The buyer receives a workflow email notification.

Renewal Date This field appears by default from the Contract page, or you can enter the renewal date on this page and the system will update the renewal date on the Contract page.

Notify Days Before Renewal Enter the number of days before a contract renewal date that you want the system to notify the buyer.

Renewal Notification Date The system determines and displays the renewal notification date. When a contract reaches this notification date, the system notifies the identified buyer that the contract is ready for renewal. The buyer receives a workflow email notification.

Approval Due Date This field appears by default from the Contract page. If the contract is in an Open status, you can enter the approval due date on this page and the system updates the date on the Contract page.

Notify Days Before Approval Enter the number of days that you want the system to notify the buyer before a contract needs to be approved.

Approval Notification Date Based on values that you define, the system determines and displays the approval notification date. When a contract reaches this notification date, the system notifies the identified buyer through workflow or email that the contract needs to be approved.

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Maximum Amount Notification

Use this section to set up amounts that trigger notifications to the buyer when the total contract released amount is either within the specified amount or percentage of the maximum contract amount.

Amount Less than Maximum Enter the amount below the contract maximum amount for which you want the system to notify the buyer that the contract is about to reach its maximum amount.

Percent Less than Maximum Enter the percentage below the contract maximum amount for which you want the system to notify the buyer that the contract is about to reach its maximum amount.

Notification Amount The system determines and displays the notification amount. When a contract reaches this notification amount, the system notifies the identified buyer that the contract is about to exceed the maximum limit amount. The buyer receives a workflow email notification.

Spend Threshold Notification

Use this section to enter the amount at which the system sends a notification to the buyer that the contract amount has reached or exceeded the spend threshold. The system totals the individual line item amounts to arrive at the total amount for the contract. The buyer is notified only after when this threshold is reached.

See Chapter 3, "Defining Supplier Contracts," Understanding Spend Thresholds and Contract Alerts, page 61.

Amount Summary

Use this section to update and review contract amounts.

Maximum Amount Enter a value to specify a total amount that this contract 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.

Total Line Released Amount Displays the total released amount of all line items on the contract. This amount is updated during the PO Calculations process, online purchase order creation, and the PeopleSoft Payables Batch Voucher process when the contract is referenced. This amount is expressed in the contract header currency.

Total Category Released Amount Displays the total released amount of all categories on the contract. This amount is updated during the PO Calculations process, online purchase order creation, and the PeopleSoft Payables Batch Voucher process when the contract is referenced. This amount is expressed in the contract header currency.

Open Item Amount Released Displays the amount that is 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. This amount is updated during the PO Calculations process or online purchase order creation. This amount is expressed in the contract header currency.

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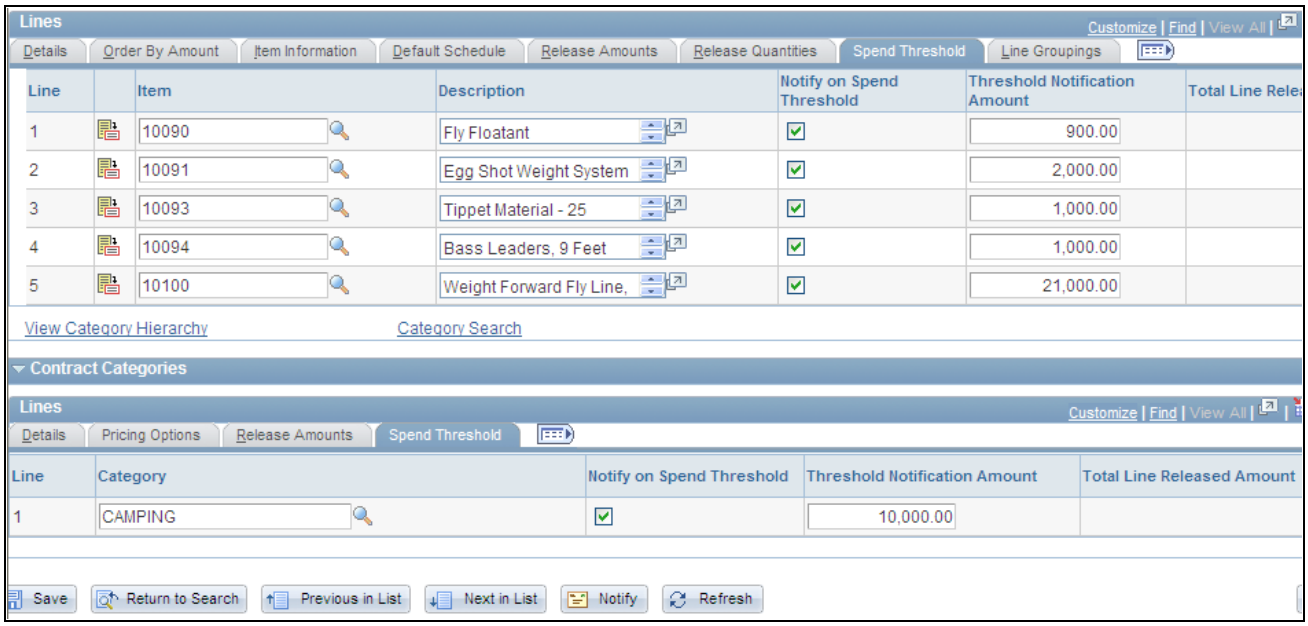
Total Released Amount Displays the total amount that has been released for this contract. This is the contract sum of line, category, and open item amounts.

Remaining Amount Displays the amount remaining on this contract (maximum amount – open item amount released – line amount released – category amount released = remaining amount). This amount is expressed in the contract header currency. This amount appears only if the maximum amount is greater than zero.

Remaining Percentage Displays the percentage of the amount remaining on this contract.

Defining Contract Line Item Spend Thresholds for Purchasing Contracts

Access the Contract Entry page: Spend Thresholds tab (Supplier Contracts, Create Contracts and Documents, Contract Entry, Contract, and select the Spend Threshold tab on the Contract page).



Contract page: Spend Thresholds tabs for lines and categories

Use this page to define spend threshold amounts and to indicate that users should be notified when the spend threshold is reached. You run the Contract Workflow Notification (CS_CNTRCT_WF) process to notify buyers when their contracts exceed spend thresholds.

Notify on Spend Threshold Select this check box to notify the buyer identified in the Administrator field when this contract line item has reached its spend threshold.

Threshold Notification Amount Enter the spent amount at which you want to notify the buyer identified in the Administrator field. When the released amount for this contract line item reaches or exceeds this amount, the system notifies the buyer one time.

Total Line Released Amount Displays the total amount that has been released for this contract line item.

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Running Contract Alert Workflow Processes

Access the Create Contract Alert Workflow page (Supplier Contracts, Create Contracts and Documents, Contract Alert Workflow).

Use this page to define criteria for running contract alerts. You can select to process only date and amount notifications, contracts that have exceeded their spend thresholds, or both.

Using the Spend Threshold Workflow Selection Criteria group box, you define how you want to process alerts when you select to run spend threshold alerts. You can select only one option. The system checks for spend thresholds that have been reached for contracts and for line items and sends an alert.

Date/Amount Workflow Select to send alert workflow messages for all contracts that have expired, are due for renewal or approval, or have exceeded their maximum monetary amount. This alert workflow is run for all contracts and setIDs.

Spend Threshold Workflow Select to notify users when contract spend thresholds have been reached. When you select this check box, you must then define the setID for which you want to run the workflow.

All Contracts Select to run the spend threshold workflow for all contracts.

Contract ID Select a contract for which you want to send spend threshold notifications.

Contract Begin Date Range Enter a contract start and end date range for contracts that you want to include in the spend threshold workflow alert. The system will include contracts with begin dates within this range for the alert. When you run the workflow alert, the system checks for spend thresholds that have been met in the contracts and sends a notification to the user.

Setting Up Contract Release Processes for Purchasing Contracts

This section provides an overview of the contract release process and discusses how to:

- Stage contract releases to create purchase orders.
- Source purchase orders automatically.
- Run the Purchase Order Calculations process.
- Create purchase orders using staging table data.
- View and update purchase orders in staging tables.

Note. These release processes are described in the PeopleSoft Purchasing PeopleBook.

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See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Using Purchase Order Sourcing"

Understanding the Contract Release Process

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 to PeopleSoft Purchasing staging tables.

Pages Used to Set Up Contract Release Processes for Procurement Contracts

Page Name	*Definition Name*	*Navigation*	*Usage*
Release Parameter	RUN_PO_POCNTRCT	Supplier Contracts, Contract Release Processes, Stage Contract POs	Stage contract releases to create purchase orders.
PO Auto Sourcing - Objectives	RUN_PO_AUTOSRC1	Supplier Contracts, Contract Release Processes, PO Auto Sourcing	Source purchase orders automatically.
PO Calculations - Run Controls	RUN_PO_POCALC1	Supplier Contracts, Contract Release Processes, PO Calculations	Run the Purchase Order Calculations process.
PO Creation - Create PO	RUN_PO_POCREATE	Supplier Contracts, Contract Release Processes, PO Creation	Create purchase orders using staging table data.
Sourcing Workbench	PO_SRC_ANALYSIS	Supplier Contracts, Contract Release Processes, Sourcing Workbench	View and update purchase orders in staging tables.

Staging Contract Releases to Create Purchase Orders

Access the Release Parameter page (Supplier Contracts, Contract Release Processes, Stage Contract POs).

Use this page to enter the selection criteria for the PO Calculations process (RUN_PO_POCNTRCT) and to run the process.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Using Voucher and Order Contracts," Running the Purchase Order Contracts Process

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Sourcing Purchase Orders Automatically

Access the PO Auto Sourcing - Objectives page (Supplier Contracts, Contract Release Processes, PO Auto Sourcing).

Use this page 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.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Using Purchase Order Sourcing," Using the Automatic Purchasing Sourcing Process

Running the Purchase Order Calculations Process

Access the PO Calculations - Run Controls page (Supplier Contracts, Contract Release Processes, PO Calculations).

Use this page 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.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Using Purchase Order Sourcing," Running the PO Calculations Process

Creating Purchase Orders Using Staging Table Data

Access the PO Creation - Create PO page (Supplier Contracts, Contract Release Processes, PO Creation).

Use this page 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.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Using Purchase Order Sourcing," Creating Purchase Orders Using the Create Purchase Orders Process

Viewing and Updating Purchase Orders in Staging Tables

Access the Sourcing Workbench page (Supplier Contracts, Contract Release Processes, Sourcing Workbench).

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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 vendor, change quantities sourced to each vendor, or correct errors.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Using Purchase Order Sourcing," Using the Sourcing Workbench

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. This section lists the pages used to access related links for supplier contracts.

Pages Used to Access Related Links for Supplier Contracts

Page Name	*Definition Name*	*Navigation*	*Usage*
Vendor - Summary	VNDR_ID1_SUM	Supplier Contracts, Related Links, Vendor	Define vendor information, including vendor name and short name, classification, status, persistence, withholding and value-added tax eligibility, relationships with other vendors, duplicate invoice checking settings, and additional elements required for reporting to government agencies. See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Maintaining Vendor Information," Entering Vendor Identifying Information.

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Page Name	Definition Name	Navigation	Usage
Category Definition	CATEGORY_TBL	Supplier Contracts, Related Links, Item Categories	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. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining Purchasing Item Information," Defining Purchasing Item Categories.
Define Items - General	INV_ITEMS_DEFIN1	Supplier Contracts, Related Links, Define Item	Define an inventory item at the setID level. This definition should include information about the item such as its classification, substitutes, status, and dimensions. See *PeopleSoft Enterprise Managing Items 9.1 PeopleBook*, "Defining Items by SetID."
Purchasing Attributes	ITM_TBL_PUR	Supplier Contracts, Related Links, Purchasing Attributes	Select to enter basic purchasing information for an item. This information can include item attributes, purchasing controls, and item vendor information. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining Purchasing Item Information," Defining Purchasing Item Attributes.
Maintain Purchase Order	PO_LINE	Supplier Contracts, Related Links, Add/Update POs	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. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Orders Online."

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Chapter 4

Defining Contract Agreements

This chapter provides an overview of contract agreements, agreement compliance metrics, lists common elements, and discusses how to:

- Use agreement metrics.
- Predefine agreements.
- Assign agreements to purchasing contracts.

Understanding Contract Agreements

This section discusses:

- Contract agreements and contract compliance.
- Agreement use.

Contract Agreements and Contract Compliance

An agreement is a negotiated set of conditions in a contract. The agreement specifically spells out the conditions and terms that apply to the contract. You use the PeopleSoft Supplier Contract Management system 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 against 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).

Often, contract terms that reference the contract cannot be measured by the data that is captured on traditional purchase order, receipt, and voucher transactions. 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, change of status, the passing of a target date, or reminder days. Notifications can be directed to supplier contacts, internal users, or both.

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Agreements can also have clauses assigned to them. After you create agreements, you use the document authoring system to manage any documents that might have been created in support of the agreement. As a part of agreement monitoring, the system manages step verification requirements and responsible parties for monitoring the agreements. The system notifies you using email when an action, such as a scheduled performance review, is needed.

In addition, you can specify that related files need to be created and attached to the 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 set up that agreement clause to require 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 can help uncover cost savings that otherwise might not have been realized.

Contract compliance is divided into two parts. The first part, described in this chapter, involves predefining agreements and assigning agreements to purchasing contracts. The second part is monitoring and analyzing compliance against agreements. That part is discussed in the next chapter.

See Also

Chapter 5, "Managing Contract Agreements," page 109

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 by default.

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 any additional information that relates to the agreements for that particular contract or delete any information that is not pertinent to the agreement.

After the 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 agreement's compliance, you can review the activity and status and manually release adjustment vouchers for any bonuses or penalties incurred.

Note. You can use contract agreement capability for sourcing events that are awarded to purchasing contracts only and that are not enabled for sourcing events awarded to purchase orders.

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Common Elements Used in This Chapter

Clause Assignments Click to access the Assign Agreement Clauses page, where you can select a clause for this agreement.

See Chapter 4, "Defining Contract Agreements," Assigning Clauses to Agreements, page 90.

Financial Implication 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.

Include In Contract Document Select to include this agreement and its associated clauses on the purchasing contract when you dispatch the contract to the vendor. You could 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.

Notification Comments 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.

Version 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.

Notification Assignments Click to access the Agreement Notifications page, 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 email that contains a URL that provides the supplier access through the supplier portal to the specific deliverable.

See Chapter 4, "Defining Contract Agreements," Assigning Notifications for Agreements and Steps, page 91.

Using Agreement Metrics

This section discusses:

- Metric measurements.
- Metric measurement types.

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- Steps for implementing metric measurements with agreements.

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 a vendor's performance and compliance to a contract agreement. The procurement history also provides you with information about procurement trends and can assist you in managing vendor relationships.

To enable the comparison of a vendor's performance against the performance defined in a contract agreement, the system uses underlying metrics as the basis for evaluating whether the agreement is being met. After running the metric process for procurement history, the system calculates agreement compliance for the contracts included in the run. When you define an agreement, you also establish a numeric 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, but not the preferred level of performance below that targeted negotiated percentage. Any percentage below the allowed tolerance is considered unacceptable.

In addition, you can set up alert notifications to inform buyers when an agreement reaches a warning or unacceptable tolerance level. You notify interested parties, such as contract managers and buyers, when a supplier's performance needs to be examined or when the supplier's performance is unacceptable. You set up the notification process for warnings using the Process Notification page. To access the page, select Supplier Contracts, Monitor and Update, Setup Agreements, Workflow Notifications.

You use Supplier Contract Management pages to view summarized performance details and measurements about agreements and to view the acceptable, warning, or unacceptable performance levels for the agreement. You view the actual performance metric percentage using the Performance Details page. The system provides additional performance data along with charted summarizations of the data. Charted data by period includes:

- Acceptable percentages.
- Warning percentages.
- Unacceptable percentages.
- Variance percentages, such as over and under and early and late percentages.

You set up agreements to use metric measurements when you define agreement codes. 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.

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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. So by tracking the supplier's performance over time and the supplier fails to meet the 95 percent target over the life of the contract, the contract manager might not want to renew the supplier's contract. The metric provides the information needed to make the decision.

In addition, suppose the contract manager wants to track the vendor's performance 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 email 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 transactional 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. Contract managers can use any of the performance-based metric measurements on this basis.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Analyzing Procurement Data and Using Group Purchasing Organizations"

Metric Measurement Types

You use the Contract Agreement Definition page to define agreement codes for use with metrics. Using the page, 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 is made available and you can select the type of metric you want to use 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 next sections describe the metric measurements available for Supplier Contract Management and how the system processes the measurements.

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 as captured within purchasing at receipt time. The system displays the percentage on-time metric, vendor name, and target percentages by period. To calculate the performance, the system:

1. Retrieves the actual on-time quantity percentage from the procurement history.

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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.

On-Time Receipt Performance Measurement

This measurement measures the actual ship on-time percentage based on actual receipt versus quantity as captured within purchasing at receipt time. To calculate the performance, the system:

1. Retrieves the actual ship on-time percentage from the contract procurement history.

   The percentage is based on the number of receipts related to the contract.

2. Calculates the on-time warning performance percentage by subtracting the tolerance-performance percentage from the negotiated percentage.

   Other calculations include:

   - If the actual ship on-time 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 ship on-time 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.

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PO/Receipt Quantity Performance Measurement

This measurement measures the percentage and actual number of purchase order receipts within the period and tracks the percentage of total ordered versus total received quantities for the contract over time. The measurement includes a purchase order-versus-receipt quantity performance chart that displays the percentage open receipt quantity metric, vendor name, and target percentage by period. To calculate the performance, the system:

1. Retrieves the actual-quantity open percentage from the procurement history.

2. Calculates the quantity-open warning performance percentage by subtracting the tolerance-performance percentage from the negotiated percentage.

   For example, if the negotiated-received percentage is 95 percent and the performance-tolerance percentage is five percent, then the quantity open on-time warning performance percentage is 90 percent. Other calculations include:

   - If the actual-quantity open percentage is greater than or equal to the quantity-open warning performance percentage and is less than or equal to the negotiated-correct percentage, then the warning-performance condition is met for the contract agreement.

   - If the actual-quantity open percentage is less than the quantity-open 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.

Quantity Performance Measurement

This measurement measures the percentage and actual number of vendor shipments with correct quantities, over-shipment quantities, and under-shipment quantities by period. The system displays the vendor name, percentage correct, percentage under, percentage over, and target percentage. To calculate the measurement, the system:

1. Retrieves the actual-correct shipment percentage from the contract procurement history.

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2. Calculates the correct-shipment warning performance percentage by subtracting the tolerance-performance percentage from the negotiated percentage.

   For example, if the negotiated correct percentage is 92 percent and the performance-tolerance percentage is three percent, then the correct-shipment warning performance percentage is 89 percent.

   Other calculations include:

   - If the actual-correct shipment percentage is greater than or equal to the correct-shipment warning performance percentage and is less than or equal to the negotiated correct percentage, then the warning-performance notification condition is met for the contract agreement.
   - If the actual-correct shipment percentage is less than the correct-shipment warning performance tolerance percentage, then the unacceptable-performance condition is met for this 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.

Quality Performance Measurement

This measurement measures the percentage and actual number of vendor shipments that are rejected for quality reasons by period. The quality reason is determined by the reason code entered at receipt time. The system displays the percentage net received metric, vendor name, and target percentage along with the rejected and returned percentages. To calculate the measurement, the system:

1. Retrieves the actual-quantity accepted percentage from the contract procurement history.
2. Calculates the quantity-accepted warning performance percentage by subtracting the tolerance-performance percentage from the negotiated percentage.

   For example if the negotiated net-received percentage is 90 percent and the performance-tolerance percentage is five percent, then the quantity-accepted warning performance percentage is 85 percent.

   - If the actual-accepted open percentage is greater than or equal to the quantity-accepted warning performance percentage and less than or equal to the negotiated accepted percentage, then the warning-performance notification condition is met for the contract agreement.
   - If the actual-quantity accepted percentage is less than the quantity-accepted warning performance percentage, then the unacceptable-performance condition is met for this 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.

Steps for Implementing Metric Measurements with Agreements

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The 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 for you that is specific for the contract. To have the system automatically generate the reporting entity, you must first:

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. Select: Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering.

   b. Select *Rept. ID* from the list of values.

      The Auto Numbering page appears.

   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. Select: Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Supplier Performance Setup.

   The Supplier Performance Setup page appears.

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.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Analyzing Procurement Data and Using Group Purchasing Organizations."

When the system processes the contract ID, it runs the Procurement History Update process (FS_PRCRUPD). The process includes necessary 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. You use the Update Procurement Info page in the Supplier Contract Management Monitor and Update Agreements component to run the process. Next, you can use the Review Supplier Performance page to review the performance for a vendor based on one of the metric measurements.

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.

This example illustrates the process for creating agreements and applying metric measurements for performance against the agreement:

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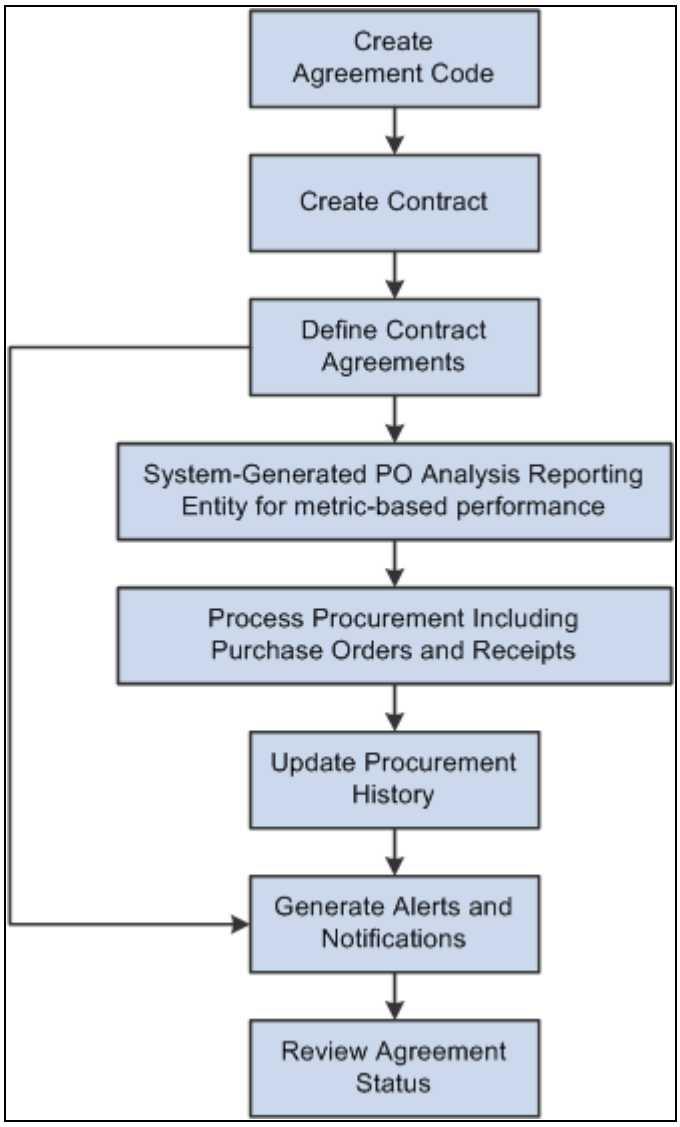

Applying metric measurements for performance process flow

To create and use agreement compliance metrics, use these steps:

1. Create an agreement code that uses one of the metric measurements and attach the code to a contract.

   This includes:

   a. Defining the verification method as *System.*

   b. Setting up warning and unacceptable performance notifications and details for individual users.

      Use the Notification Assignments link on the Contract Agreement Definition page to access the Agreement Notification page.

      See Chapter 4, "Defining Contract Agreements," Processing Agreement Notifications, page 94.

2. Set up auto numbering and reporting entities reference on the Supplier Performance Setup page as described earlier in this section.

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3. Run the Procurement History Update process.

   This step updates procurement activity for the period and contract that you specify. Make sure that you run the process from within Update Procurement Info component in Supplier Contract Management.

   See Chapter 5, "Managing Contract Agreements," Updating Contract Procurement History, page 121.

4. Run the Workflow Notification (CS_NOTIFY_WF) process as needed to generate email 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.

5. Access the Review 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.

6. Click the Cumulative Performance value to review supplier performance information.

   This link accesses the View Vendor 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.

The Review Agreement Statuses page provides the supplier's Cumulative Performance value and a link to the View Vendor Shipment Performance page.

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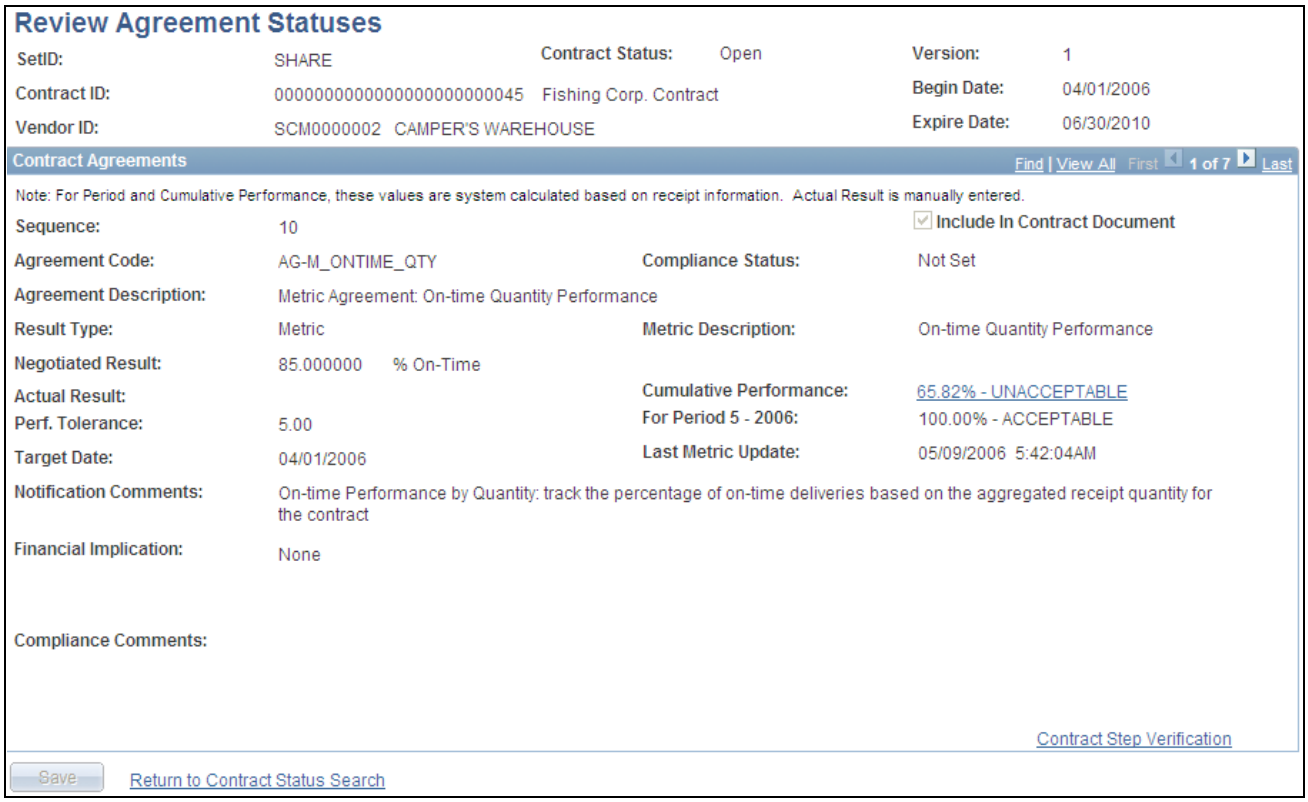

Update Agreement Statuses page

Use this page to view the level of acceptance or noncompliance to the agreement. Click the Cumulative Performance link value to review more specific details about the supplier's performance. When you access the View Vendor Shipment Performance page, you can review percentages, time periods, and actual shipment quantity and quality, such as the number of items received and the number rejected.

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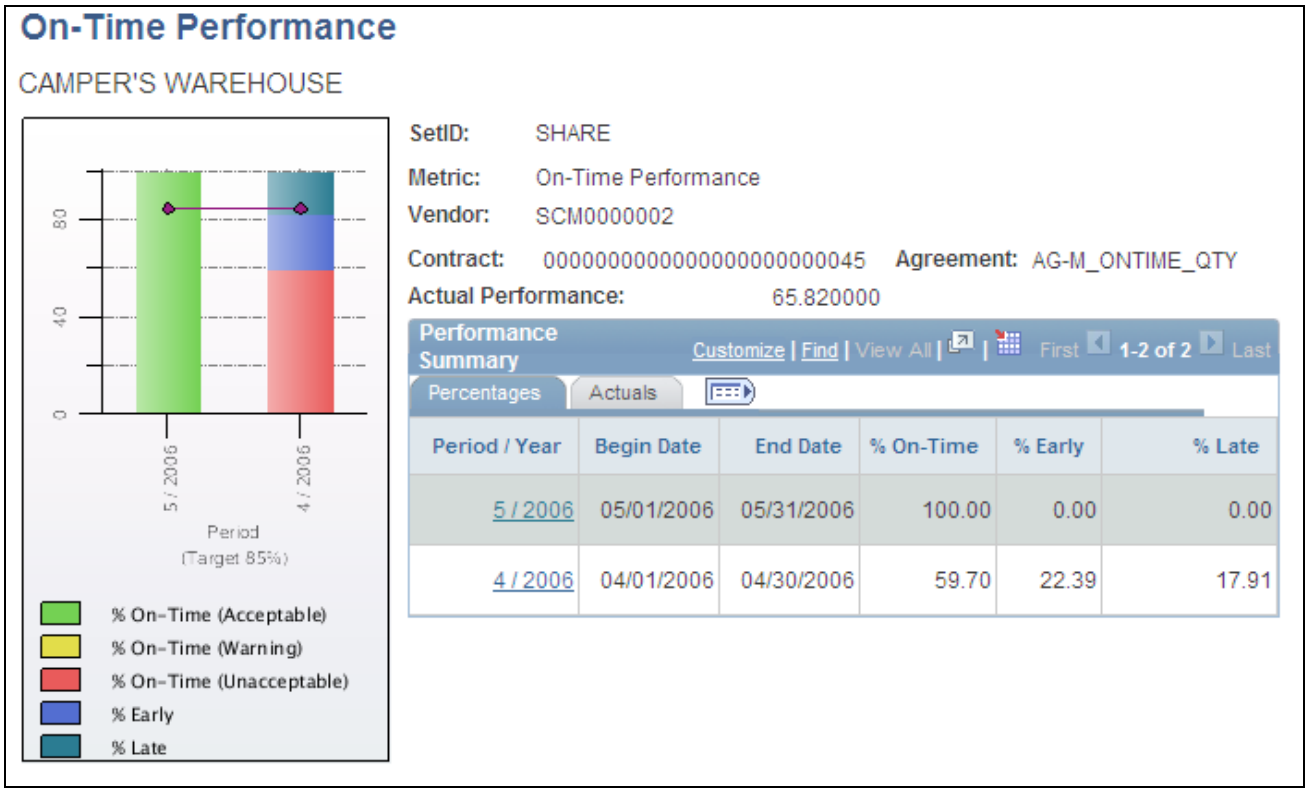

View Vendor Shipment Performance page (1 of 2)

The View Vendor Shipment Performance page displays 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, suppose you are tracking quality performance and, using the Contract Entry component, have established that an acceptable level of returns is five percent. 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.

Through the Cumulative Performance link value, you can also access additional 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:

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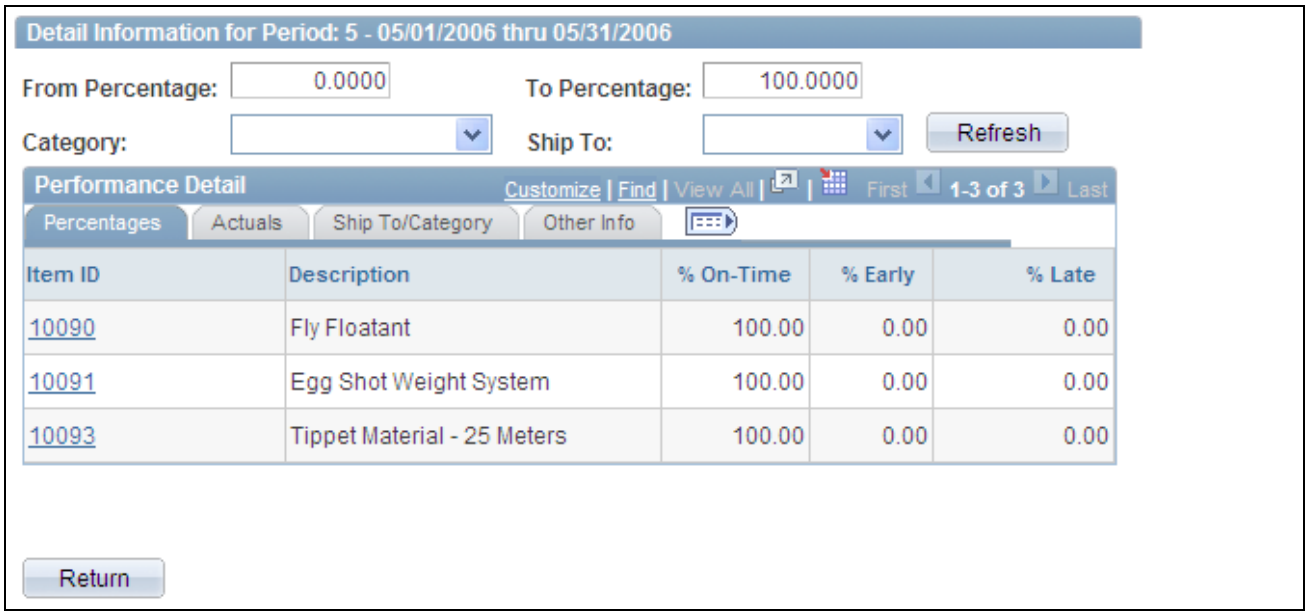

View Vendor Shipment Performance page (2 of 2)

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.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Analyzing Procurement Data and Using Group Purchasing Organizations"

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Analyzing Procurement History," Reviewing Supplier Performance

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Analyzing Procurement History," Viewing Procurement Analysis Data

Predefining Agreements

This section discusses how to:

- Set up basic agreement information.
- Define agreement verification steps.
- Assign clauses to agreements.
- Assign notifications for agreements and steps.
- Process agreement notifications.

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Pages Used to Predefine Agreements

Page Name	*Definition Name*	*Navigation*	*Usage*
Contract Agreement Definition	CS_AGREE_HDR	Supplier Contracts, Monitor and Update Agreements, Setup Agreements, Contract Agreement	Set up basic agreement information for contract agreements.
Assign Agreement Clauses	CS_AGREE_CLAUSE	Click the Clause Assignments link on the Contract Agreement Definition page.	Assign clauses to agreements.
Agreement Notification	CS_AGREE_WF	Click the Notification Assignments link on the Contract Agreement Definition page.	Assign notifications for agreements and steps.
Process Notifications	CS_RUN_CNTL_WF	Supplier Contracts, Monitor and Update Agreements, Setup Agreements, Workflow Notifications	Process agreement notifications.

Setting Up Basic Agreement Information

Access the Contract Agreement Definition page (Supplier Contracts, Monitor and Update Agreements, Setup Agreements, Contract Agreement).

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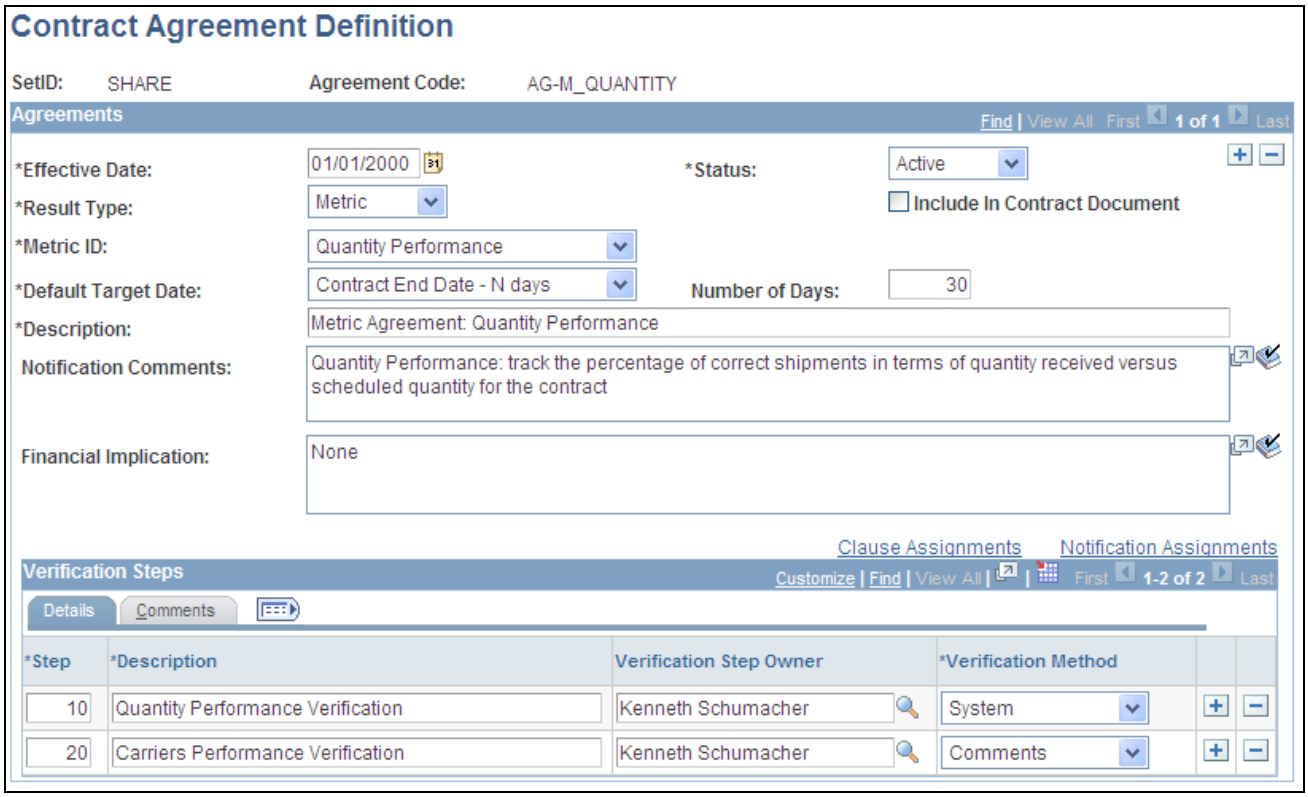

Contract Agreement Definition page: Details tab

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.

Agreement Code Displays the identifier for the agreement that you are adding or maintaining. Agreement codes are defined by setID.

Effective Date 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 and change the value.

Status Select the state of the agreement. If you select *Active,* the agreement is available for immediate use with contracts. If you select *Inactive,* you can create the agreement and define its data, but it is not available for use.

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Result Type

Select a value that indicates how you are measuring the results of the agreement. You can leave the field blank to indicate the value is not an applicable value. The result type you select determines other page elements and system behavior when you assign this predefined agreement to a contract.

Field values include:

Date: Select to use a calendar date as the type of result. 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.

Metric: Select to measure the performance against a contract agreement using a metric-based type. When you select this type, the Metric ID field is made available and you can select the type of metric you want to use to measure performance against negotiated terms for contract agreement header and line-level agreements. The system can use notifications to verify the negotiated metrics on the agreement against procurement history.

Monetary: Select this type when a monetary value is associated with the agreement. For example, if the supplier must provide you with the cost of an extended warranty, you would use a *Monetary* result type.

None: Select this type when no compliance requirements exist. You 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.

Numeric: Select to use figures, such as the number of days in which a supplier must respond to a service call to measure the agreement.

Text: Select to use text if verification of the agreement will be in the form of free-form text. This text might include observations by an on-site inspector or comments by the contract administrator.

Yes/No: Select to use a yes or no indicator to specify whether the agreement was met.

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Default Target Date

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 will not change the contract's target date on any contract where this agreement code is specified.

Using the target date, you can work with different requirements when you need to verify agreement results. For example, an agreement might relate to conditions that must be met before you can execute the contract.

Methods include:

Contract End Date: 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 Number of Days field and disables the field.

Contract End Date + N days: Select to use the contract end date plus the number of days that you enter in the Number of Days field.

For example, if you enter *10* in the field, the verification of the agreement is due ten days after the contract end date.

Contract End Date – N days: Select to use the contract end date, minus the number of days that you enter in the Number of Days field. This action makes the verification agreement due before the contract end date.

Contract Start Date: 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 Number of Days field.

Contract Start Date + N days: Select to use the contract start date plus a specified number of days after that date to establish the due date for agreement verification.

Contract Start Date – N days: Select to use a specified number of days before the contract start date as the due date for agreement verification.

Number of Days

Enter the number of days by which you want to offset the default target date. For example, if you select *Contract Start Date + N days* in the Default Contract Date field and you want the default contract date to be seven days after the contract start date, enter *7* in the Number of Days field.

Description

Enter an extended description of the agreement. This field is required.

Defining Agreement Verification Steps

Access the Contract Agreement Definition page (Supplier Contracts, Monitor and Update Agreements, Setup Agreements, Contract Agreement).

Use the Verification Steps grid on the Contract Agreement Definition page to define the verification steps for this agreement.

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Step

Displays the system-assigned step that defines the order in which verification is completed. The system begins the sequence numbering with 10, but you can change the sequence. Consider leaving gaps between the step numbers in case you want to insert additional steps at a later date.

Verification steps define the criteria necessary to fulfill the agreement. 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. 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.

Description

Enter a description of the verification step. This description might be a document or inspections that are required to complete the step. If you add a verification step to the agreement, this field is required.

Verification Step Owner

Select a user who will be responsible for this agreement verification step. You can also enter an owner's name. The owner does not have to be associated to a user ID. When you select this agreement to use with a contract, the system populates the verification owner information along with due date information for the contract agreement.

Verification Method

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.

Verification methods include:

Attaching Supporting Documents: Select to indicate that the verification of this agreement step is accomplished by posting supporting documentation. The verification owner can attach supporting materials by using the Update Agreement Statuses page.

Comments: Select to indicate that the verification can be made by entering text or comments.

Date/Time Stamp: Select to indicate that a date and time stamp will be provided when the step has been completed.

Notify: Select to indicate that action is not required to signify the step is completed. If you assign notifications 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.

On Line Verification with Yes/No: Select to indicate that the verification owner can update the verification step online using a yes or no response.

System: Select to indicate that the verification of this step should be provided by the system. 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 system as the verification method must exist for a contract agreement with a metric result type.

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Comments

Select the Comments tab.

Use this page to enter comments about the verification step to include the email notification that is sent to the approver, collaborator, or reviewer. You can enter up to 254 characters. You can define separate comments for each verification step.

Assigning Clauses to Agreements

Access the Assign Agreement Clauses page (click the Clause Assignments link on the Contract Agreement Definition page).

Use this page to assign one or more clauses to the contract agreement. The system adds these clauses to the transactional contract when you specify this agreement for either the contract header or contract line.

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 Chapter 14, "Searching for Library and Document Contents," Searching Clause Content, page 605.

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 for use again.

Sequence 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.

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.

Clause ID 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.

Search Select to access the Clause Search page, where you can provide search information for locating clauses.

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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.

Full Text 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.

By Reference Text 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.

Title Displays the clause title. This value is used with the clause regardless of whether you select Full Text or By Reference Text.

Full Text Displays the full text that appears in the clause agreement if you select Full Text in the Select Body Text group box.

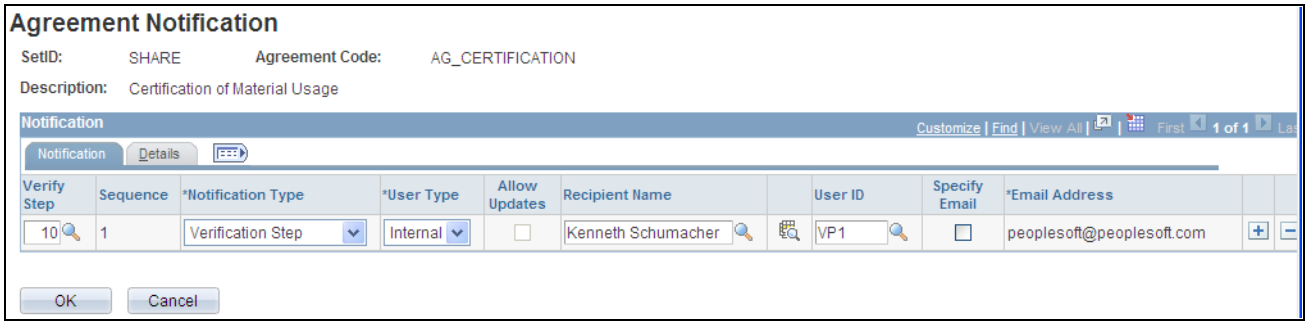
Reference Text Displays the by reference text that appears in the clause agreement if you select By Reference Text in the Select Body Textgroup box.

See Also

Chapter 9, "Managing the Contract Library," Defining Contract Clauses, page 307

Assigning Notifications for Agreements and Steps

Access the Agreement Notification page (click the Notification Assignments link on the Contract Agreement Definition page).



Agreement Notification page: Notification tab

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.

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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.

Sequence Displays the notification sequence. This is a system-generated number that identifies the notification.

Notification Type 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:

Agreement: 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

Agreement and Step: 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.

Verification Step: 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.

Verify Step Select a verification step to which this notification applies. The system displays this field when you select *Verification Step* as the value in the Notification Type field. Verification steps define the documents or inspections that might be necessary to fulfill the agreement.

User Type 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 *Internal*, the system low lights the Allow Updates check box.

If you select *External*, you can indicate if the external user can update the agreement and manually enter users and their email addresses.

Allow Updates 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.

Note. For more information about external users, see the Maintaining Supply-Side Documents and Deliverables chapter.

See Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Reviewing and Collaborating on External Documents, page 133.

See *PeopleSoft Enterprise eSupplier Connection 9.1 PeopleBook*, "Maintaining Vendor Information."

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Recipient Name You use this field to 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 User ID and Email Address fields automatically, use the Search Recipient button, described next, to select a recipient.

Search Recipient Click this button to search for users based on either their recipient name, user ID, or email address. The system populates the Recipient Name,User ID, and Email Address fields with your selection.

User ID Select an user ID to use for this notification.

Specify Email Select to use highlight the Email Address 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.

Email Address 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 Specify Email check box is selected to send the email.

Details

Select the Details tab.

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.

Notify On Status Change 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 *Agreement* or *Agreement and Steps* when the compliance status of the agreement is changed from *Not Set* to *Cancelled*, *Compliant*, or *Not Compliant.*

If the activity status of the verification step changes from *Not Started* to *Cancelled*, *Completed*, *Failed*, or *In Process* and the recipient's notification type is set to *Agreement and Steps* or *Steps* (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.

Warning Performance 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.

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Unacceptable Performance 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.

Reminder Number Of Days Prior 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 does not notify the recipient until five days before March 15 (that is, March 10). If the notification type is Agreement, the system notifies the recipient this number of days before the target date of the agreement.

If the notification type is Verification Step, the system notifies the recipient this number of days before the due date of the step. If the notification type is Agreement and Step, 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.

Final Reminder Days 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 Reminder Number of Days Prior field and represents the last notification before the target date or due date have passed.

Passed Target Date 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 *Compliant* or the due date of the step has passed and the activity status is not set to *Completed.* The system notifies the recipient following each run of the Workflow Notifications process until the agreement or step status is set to *Compliant/Completed* or *Canceled.*

Processing Agreement Notifications

Access the Process Notifications page (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.

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- 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.

User ID Displays the ID of the user running the process.

Request ID Enter a unique identifier for this run control process.

SetID Enter a valid setID. If you leave the field blank, the system processes contracts for all setIDs.

Contract ID Select a contract for which you want notifications processed. If a contract is not specified, the process creates notifications for all contracts that have agreement notifications specified. If you entered a setID, the system only processes the contracts for that setID. If you do not enter a setID, the system processes all contracts for all setIDs.

Agreement Past Due Select if you want the system to issue past due notifications each time this process is run. If the Passed Target Date 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 yet set to Compliant, the process issues a past due notification.

Therefore, if the agreement is past due by 10 days and this process is run daily, the recipient will have received 10 past due notifications and will continue to receive reminders each time this process is run until the task is set to Compliant or this check box is deselected.

If the Passed Target Date check box is not selected for the agreement notification, the system does not send past due reminders, regardless of this setting.

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Verification Past Due

Select if you want the system to issue past due notifications for verification steps each time it runs this process. If the Passed Target Date check box is selected for the verification step, the current date is past the due date of the verification step and the step is not yet set to Completed, the system issues a past due notification.

Therefore, if the step is past due by five days, and the system runs this process daily, the recipient will have received five past due notifications and will continue to receive reminders each time this process is run until the task is set to Completed or this check box is deselected.

If the Passed Target Date 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.

Warning & Unacceptable Performance

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.

As of Date

Enter a date that you want to use as the end date for sending notifications. If you select to send warning and unacceptable performance notifications, then this field is required to determine which metric-agreement verification steps in the contract should be considered for notification.

If the contract's verification step Due/Start Notify Date field value is less than or equal to the value that you enter in the As of Date field, and the metrics negotiated result is unacceptable or outside of tolerance, then a notification will be sent to the specified users. Setting the As of Date field on the run control provides you more control over when the notifications are sent for metric-related agreements by allowing for an as of date that is prior to today's date.

Note. 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.

Last Period Only

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.

Note. 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 As of Date field.

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Assigning Agreements to Purchasing Contracts

This section provides an overview of purchasing contract agreements and discusses how to:

- Assign contract header agreements.
- Set up header agreement verification steps.
- Assign contract header clauses.
- Assign contract header notifications.
- Assign contract line agreements.
- Assign contract line clauses.
- Assign contract line 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 both PeopleSoft Strategic Sourcing and Supplier Contracts Management, you can optionally assign clauses and agreements to the Strategic Sourcing bid factors. The clauses can appear to bidders online during the bid response process as well as 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.

Pages Used to Assign Agreements to Purchasing Contracts

Page Name	*Definition Name*	*Navigation*	*Usage*
Contract Header Agreement Assignments	CS_AGREE_CNT	Supplier Contracts, Create Contracts and Documents, Contract Entry Click the Contract Agreement link on the Contract Entry page.	Assign contract header agreements.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Contract Header Clause Assignments	CS_AGREE_CNT_CLAUS	Click the Clause Assignment link on the Contract Header Agreement Assignments page.	Assign contract header clauses.
Contract Header Notification Assignments	CS_AGREE_CNT_WF	Click the Notification Assignments link on the Contract Header Agreement Assignments page.	Assign contract header notifications.
Contract Line Agreement Assignments	CS_AGREE_CLN	Supplier Contracts, Create Contracts and Documents, Contract Entry Click the Contract Agreement button for the line item on the Contract Entry page.	Assign contract line agreements.
Contract Line Clause Assignments	CS_AGREE_CLN_CLAUS	Click the Clause Assignment link on the Contract Line Agreement Assignments page.	Assign contract line clauses.
Contract Item Line Notification Assignments	CS_AGREE_CLN_WF	Click the Notification Assignments link on the Contract Line Agreement Assignments page.	Assign contract line notifications.
Contract Category Agreement Assignments	CS_AGREE_CAT	Supplier Contracts, Create Contracts and Documents, Contract Entry Click the Contract Agreement button for the category line on the Contract Entry page.	Assign contract category agreements.
Clause Assignments	CS_AGREE_CAT_CLAUS	Click the Clause Assignment link on the Contract Category Agreement Assignments page.	Assign contract line clauses.
Contract Category Notification Assignments	CS_AGREE_CAT_WF	Click the Notification Assignments link on the Contract Category Agreement Assignments page.	Assign contract category notifications.

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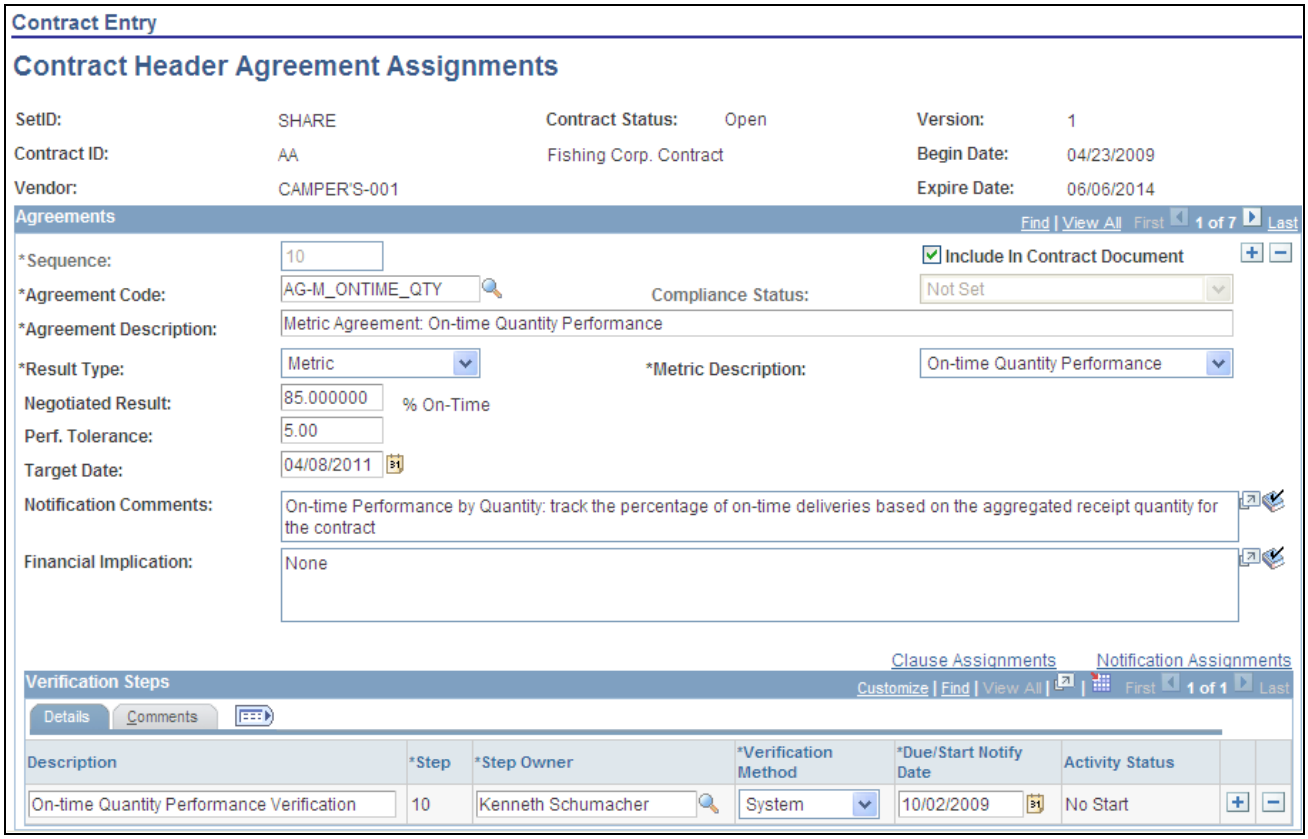
Assigning Contract Header Agreements

Access the Contract Header Agreement Assignments page (Supplier Contracts, Create Contracts and Documents, Contract Entry, and click the Contract Agreement link on the Contract Entry page.



Contract Header Agreement Assignments page: Details tab

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, vendor, and version number.

If you use a predefined agreement code, the information from the agreement appears as default information on the Contract Header Agreement Assignments page. You can change this default information, but changes to the 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. When you select an agreement to assign to the contact, ensure the agreement is effective-dated as of the contract begin date. If the agreement is not effective, the system issues a message when you select a result type.

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.

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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 to 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 or not. A contract can have multiple agreements with each one having a different set of verification steps. You can also assign clauses and notification information for 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.

Sequence

Displays the agreement sequence code. If you are adding agreements to a contract initially, the default sequence number is 10, but you can change it as needed. 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.

The sequence number controls the order in which any 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.

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.

Include in Contract Document

Select to include the agreement information and its associated clauses on the purchasing contract when you author the contract document. You could 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 instances, the information should not be included in the wording of the contract document.

Compliance Status

Displays the current status of this agreement. You cannot change the status using this page. Use the Update Agreement Status page to update the status.

Values are:

Cancelled: Indicates that the agreement has been canceled.

Not Compliant: Indicates that the verification steps have been completed, but the agreement is not in compliance with the agreed upon terms.

Not Set: Indicates that the agreement steps are still in process or not yet started. This value is the initial setting when the agreement is added.

Compliant: Indicates that the verification steps are completed and the agreement is in compliance with the set terms. If you change any aspect of the agreement after this value has been set to *Compliant,* the system sets the status back to *Not Set.*

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Agreement Code Select a predefined code or enter an ad hoc code. If you select a predefined code, the system populates the rest of the agreement with the information defined for that code. If you are entering an ad hoc agreement, you must complete all the required fields. If the contract was created from a PeopleSoft Strategic Sourcing event, the system converts bid factor responses to the agreement information.

Agreement Description Displays the description that was previously assigned if you entered an agreement code. If you are creating an ad hoc agreement, enter a description.

Result Type Select a value that 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 *None* is selected, the system provides a Negotiated Result field.

Field values include:

Date: Select to use a calendar date as the type of result for measuring the output of the agreement.

Metric: Select to measure the performance against a contract agreement using a metric-based type. When you select this type, the Metric ID field is made available and you can select the type of metric you want to use to measure performance against negotiated terms for contract agreements.

Monetary: Select to use costs that relate to the agreement as the result measurement.

Numeric: Select to use figures, such as the number of hours a day a crew has access to the work site, to measure the agreement.

Text: Select to use a question that requires a text answer, such as a description of work completed.

Yes/No: Select to use a question with a yes or no answer as the measurement of whether the agreement is compliant or not compliant.

Negotiated Result When you select a result type other than *None*, this field becomes available for input. 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 value you selected in the Result Type field. If you selected *Date* as a result type, enter a date here. If you selected *Monetary* or *Numeric* as the result type, enter the amount here. If you selected *Text*, an expanded field appears for you to type instructions or descriptions of up to 256 characters. For metric-based agreements, 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.

Metric ID When the Result Type field value is *Metric*, this value must be specified to determine the type of metric to be tracked. For example, to track the on-time performance by quantity metric, you would select *OnTime Qty* from the list of values.

UOM (unit of measure) Select a unit of measure that defines the numeric value entered in the Negotiated Results field. The UOM field is available and required if you selected a result type of *Numeric.* This value can represent, for example, hours or days.

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Currency	If you selected a result type of *Monetary*, the Currency field is available for input and is a required field. Select the currency that defines the monetary amount entered in the Negotiated Results field.
Perf. Tolerance (performance tolerance)	If you selected a result type of *Metric*, the Perf. Tolerance field appears. Enter a tolerance percentage. The performance tolerance defines the percentage below the negotiated result that you allow before a performance is considered unacceptable. For performance results that are above the performance tolerance, but are below the negotiated result, the system will send performance warnings if notifications have been set up to send the warning.
Target Date	Enter the date by which the terms of the agreement must be completed to be compliant. You can enter a date or the system will enter the date automatically by calculating 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.
Notification Comments	Enter text that will appear in the notification worklist if notifications are set up for the agreement.
Financial Implications	Enter text that describes any financial implications whether the agreement is or is not met. The text might specify a penalty assessed or a bonus paid to the vendor.

See Also

Chapter 4, "Defining Contract Agreements," Setting Up Basic Agreement Information, page 85

Setting Up Header Agreement Verification Steps

Access the Contract Header Agreement Assignments page (Supplier Contracts, Create Contracts and Documents, Contract Entry, and click the Contract Agreement link on the Contract Entry page.

Use the Verification Steps grid on the Contracts Header Agreement Assignments page to define the steps required to validate the agreement. If you previously 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 here.

Use the Verification Steps grid box to 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.

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Step

Displays the system-assigned step that defines the order in which verification is completed. The system begins the sequence number with 10, but you can change the sequence. You should leave gaps between the step numbers in case you want to insert additional steps at a later date.

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.

Description

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.

Step Owner

Select the person responsible for verifying that the step was completed. Verification might include the step owner collecting documents or notifying the contract administrator whether a step is compliant. The step owner can be someone internal to the company or an external contact or vendor.

Verification Method

Select the method by which you want this step verified. The method defines how a verification owner indicates a step was completed. This field is required if steps are added to the agreement. Verification methods include:

Attachment: Select to indicate that the verification of this agreement step is accomplished by posting supporting documentation. The verification owner can attach supporting material using the Update Agreement Statuses pages.

Comments: Select to indicate that the verification can be made by entering text or comments.

Date/Time: Select to indicate that a date and time stamp will be provided when the step has been completed.

Notify: Use this option when no action is required to signify the step is completed. 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.

Yes/No: Select to indicate that the verification owner can update the verification step online using a yes or no response.

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Due/Start Notify Date 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.

For metric-related steps, this date indicates when you want to start evaluating metric-agreement performance. You use metric-related agreements to track supplier performance and a notification process to warn specified users about supplier performance. PeopleSoft Supplier Contract Management uses procurement history from PeopleSoft Purchasing to gather transactional-agreement compliance information for metric-related agreements. This enables you to use summaries of purchase order receiving transactions to measure a vendor's performance and compliance to a contract agreement for quality and on-time performance.

When you define a metric-related agreement, you must use the *System* value in the Verification Method field for a row in the Verification Steps grid.

For system verification methods, the value in the Due/Start Notify Date 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 As of Date field on the Process Notification run control page. If the Due/Start Notify Date field value is less than or equal to the As of Date field value on the run control, the system checks this metric to determine if notifications need to be sent.

You use the Process Notifications page to periodically run the Workflow Notification process. The Process Notifications job initiates the reminders and notifications specified on an agreement. These reminders and notifications are defined for an agreement when changes in the agreement's status occur for the agreement or verification step, when you want to notify the recipient about a pending or past due date, and when a supplier is out of tolerance or not meeting minimum performance requirements for a contract. Performance requirements that are system based are based on metric-related agreements.

See Chapter 4, "Defining Contract Agreements," Processing Agreement Notifications, page 94.

Activity Status Displays the status of the verification step. The status is not updated here. Use the Verification Step link on the Update Agreement Status page to update the status.

Values are:

Cancelled: Indicates that the step owner has canceled the verification of this step.

Completed: Indicates the step has completed.

Failed: Indicates the step has not been completed by the agreed upon date.

In Process: Indicates that the verification process has started or the task is in the process of being completed.

Not Started: Indicates that the step owner has not started the verification process.

Comments

Access the Comments tab.

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Notification Comments Enter a description that the system uses if notifications are associated with the step.

Assigning Contract Header Clauses

Access the Contract Header Clause Assignments page (click the Clause Assignments 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 here. Likewise, 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 here.

As with verification steps, you can add or delete clauses without affecting the basic agreement or bid factor definition. You cannot change the text of the clause here. Use the Clause Definition page to update clauses. The order in which the clauses were added to each agreement determines the order in which they appear in the document.

See Also

Chapter 4, "Defining Contract Agreements," Assigning Clauses to Agreements, page 90

Assigning Contract Header Notifications

Access the Contract Header Notification Assignments page (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.

See Also

Chapter 4, "Defining Contract Agreements," Assigning Notifications for Agreements and Steps, page 91

Assigning Contract Item Line Agreements

Access the Contract Item Line Agreement Assignments page (Supplier Contracts, Create Contracts and Documents, Contract Entry, and click the Contract Agreement button for the line item on the Contract Entry page).

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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 page. 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 grid box to establish verification methods and verification step owners. To update item line agreement statuses, use the Monitor and Update Agreements component to access the Update Agreement Statuses page where you can view and manage verification processes.

Note. Metric agreements are not available at the line- and category-agreement level.

See Also

Chapter 4, "Defining Contract Agreements," Assigning Contract Header Agreements, page 99

Assigning Contract Line Clauses

Access the Contract Line Clause Assignments page (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 additional clauses by clicking the Add a New Row button.

See Also

Chapter 4, "Defining Contract Agreements," Assigning Clauses to Agreements, page 90

Assigning Contract Item Line Notifications

Access the Contract Item Line Notification Assignments page (click the Notification Assignments link on the Contract Item 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

See Also

Chapter 4, "Defining Contract Agreements," Assigning Notifications for Agreements and Steps, page 91

Assigning Contract Category Agreements

Access the Contract Category Agreement Assignments page (Supplier Contracts, Create Contracts and Documents, Contract Entry, and click the Contract Agreement button in the Contract Categories grid on the Contract page).

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Use this page to assign an agreement to a category on a contract. This feature makes it possible to define contract terms and clauses specific to an entire group of items in a contract category.

Use the Verification Steps grid box to establish verification methods and verification step owners. To update category agreement statuses, use the Monitor and Update Agreements component to access the Update Agreement Statuses page where you can view and manage verification processes.

See Also

Chapter 4, "Defining Contract Agreements," Assigning Contract Header Agreements, page 99

Assigning Contract Category Clauses

Access the Contract Category Clause Assignments page (click the Clause Assignments 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.

See Also

Chapter 4, "Defining Contract Agreements," Assigning Clauses to Agreements, page 90

Assigning Contract Category Notifications

Access the Contract Category Notification Assignments page (click the Notifications Assignment 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 indicate to 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.

See Also

Chapter 4, "Defining Contract Agreements," Assigning Notifications for Agreements and Steps, page 91

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Chapter 5

Managing Contract Agreements

This chapter provides an overview of agreement management and discusses how to:

- Update agreement statuses.
- Update contract procurement information.
- Monitor agreement compliance.
- Review contract agreement statuses.

Understanding Agreement Management

Agreement management is a PeopleSoft Supplier Contract Management feature that assists you in monitoring, updating, and reviewing header, line, and category agreements and 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 emails that contain URLs. The URLs provide external parties access to the supplier facing portal so they can review and update deliverables online.

See Chapter 6, "Maintaining Supply-Side Documents and Deliverables," page 131.

After assigning agreements to a contract, you use the Agreement Management feature to indicate whether a verification step is in process, has been completed successfully or not, and whether the agreement met the requirements for compliance.

You can define certain agreements so that they are manually updated by users. In addition, Supplier Contract Management provides predefined metric-related agreement capability 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, but assists you in documenting compliance or noncompliance of contracts.

Note. Agreement management does not include any clause or document approvals or collaboration that you might need to perform for an agreement document.

When agreements and any associated verification steps are assigned to a contract, the system can send workflow notifications to interested parties when due dates are approaching and an action must be completed. This might 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. Using the component, the verification step owner can indicate that verification is in process, has been completed, or has failed. After the steps have been completed, either successfully or not, the contract administrator can indicate whether or not the supplier or internal party has met the terms of the agreement.

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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. Additionally, the verification step details 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 simply 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 and is described in the previous chapter. The second part is updating, monitoring, and analyzing compliance against agreements and is described in this chapter.

See Also

Chapter 4, "Defining Contract Agreements," Understanding Contract Agreements, page 71

Updating Agreement Statuses

This section discusses how to:

- Search for contract agreements.
- Update agreement statuses.
- Verify agreement verification steps.
- Upload attachments for agreement steps.

Pages Used to Update Agreement Statuses

Page Name	*Definition Name*	*Navigation*	*Usage*
Update Agreement Statuses	CS_CNT_AG_SEARCH	Supplier Contracts, Monitor and Update Agreements, Update Agreement Statuses	Search for contract agreements.
Update Agreement Statuses	CS_CNT_AG_RESULTS	Click the Search button on the Update Agreement Statuses page after completing search criteria and click an agreement sequence and code.	Update agreement statuses.

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Page Name	Definition Name	Navigation	Usage
Contract Verification Details	CS_CNT_VFY_SEC	Click the Contract Step Verification link on the Update Agreement Statuses page.	Verify agreement verification steps.

Searching for Contract Agreements

Access the Update Agreement Statuses page (Search page) (Supplier Contracts, Monitor and Update Agreements, Update 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 will appear when the Search button is selected. 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

Agreement search criteria include:

Contract ID 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 Approved, Open, or On-Hold status. Contracts that are in a Closed or Cancelled status are not available for searching

Item Line Select a contract item line number on which to search for agreements. If you specify a line number here, the system retrieves only those agreements for that line number, but also considers the value that you select in the Results to Include 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 *Header, Item Line, Category Line* for Results To Include field , and specify B in Item Line field, system returns all the header rows, item line B, and all category lines.

If item line agreement numbers are not associated with the contract the search results will be blank when you select to look up the item line. The search is similar for contract category line searches described next.

Cat. Line(category line) 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 the search results will be blank when you select to look up the contract category line.

Verification Step Owner Select to limit the search results to agreements that have a specific step owner. This is the person responsible for verifying that a step in the agreement has been met.

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Compliance Status Select a status on which to limit search results. If you don't make a selection, all agreements that meet the remaining criteria appear in the search results. Statuses that you can select include *Cancelled*, *Compliant,Not Compliant*, or *Not Set.*

You can also limit the search results to header agreements, line agreements or contract category line agreements by selecting the appropriate option in the Results to Include field. The system uses Header, Item Line and Category Line as the default value. Header agreements are those agreements that have been attached to the general terms of a contract and typically apply to the entire contract.

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 *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Using Voucher and Order Contracts," Understanding Contract Categories.

A line agreement applies to a specific line in the contract. For example, suppose that an agreement defines the terms for inspecting all items on the contract upon their receipt. You create this agreement using the Contract Agreement link in the contract header. Then, suppose that you have an item in the same contract that requires special inspection techniques or testing. This is called a line agreement. You use the Contract Agreement button in the contract line to add the terms of this agreement. The system displays the agreements as either header, line, or category agreements when they appear after the search.

You can make only one selection. Select Header Agreements Only, Item Line Agreements Only or Category Line Agreements Only to include only the one that you select in the search results, or select Header, Item Line, Category Line to include all three agreement types in the search results.

After you define the criteria, click the Search button and the system retrieves agreements that match the criteria.

Agreements Retrieved

Use this grid to 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 an agreement.

Contract ID 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.

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 *HEADER* to view all header-level agreements for the contract. Click the agreement link that is labeled as *LINE* to view the line-level agreement. And, click the agreement link that is labeled as *CAT LN* to view the contract category agreement for the line.

Agreement Sequence and Codeand**Agreement Description** 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 you selected. A description of the agreement also appears.

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Compliance Status Displays the current state of the agreement's compliance to the agreement's terms. Valid values are *Cancelled,Compliant, Not Compliant,* or *Not Set.*

See Also

Chapter 14, "Searching for Library and Document Contents," Understanding Verity and Where-Used Searches, page 591

Updating Agreement Statuses

Access the Update Agreement Statuses page (Results page) (click the Search button on the Update Agreement Statuses page after completing search criteria, and click an agreement sequence and code).

Contract administrators use this page to view and update the contract agreement status and access the 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 in use, 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 the contract documents. The button is available of a contract document has been created for the contract.

See Chapter 4, "Defining Contract Agreements," Predefining Agreements, page 84.

Most information on this page is display-only, except the Compliance Status,Actual Result,Notification Comments, and Compliance Comments fields.

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Compliance Status Select a status for the agreement. The system displays the current status for the agreement. The initial value for this field is *Not Set.* You can change the status to one of these values:

Cancelled: Select to indicate 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.

When the agreement is set to *Cancelled,* all of the associated steps are also set to *Cancelled.* If you decide to reactivate the agreement, you must manually reset the steps to *Not Started* or *In Process.*

Compliant: Select to indicate that all terms of the agreement have been met. 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 In Process or Not Set, or if an attachment is required but not yet linked, the system issues a warning that specifies which steps need to be completed.

Note. Be sure to first enter the actual results and any compliance comments before setting the status to Compliant.

Not Compliant: Select to indicates that the agreement is not in compliance with the agreed upon terms.

Not Set: Select to indicate that the compliance has not yet been determined. The system automatically assign this status to the agreement when the agreement is added to the contract.

If the agreement is currently set to *Cancelled,Compliant,* or *Not Compliant* and changes are made to the agreement on the contract, the status is automatically reset to *Not Set.*

With each change of status, the system updates the Last User to Update and Last Update Date/Time 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.

Last User to Update Displays the last user to update the agreement's status.

Last Updated On Displays the date on which the agreement was updated.

Result Type 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 data for the agreement.

See Chapter 4, "Defining Contract Agreements," Using Agreement Metrics, page 73.

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Negotiated Result

Displays the user-defined value for the expected result of this agreement. The negotiated result is the expected outcome of the agreement and represents the value of that outcome. From a date value to a monetary value, this is the value that the contract administrator uses to determine whether the agreement is compliant.

If you are using a metric to track results, this field displays the percentage and the value the percentage represents. For example, the value might be an on-time percentage of 95 percent, representing the agreed target for percentage of on-time purchase order receipts related to the contract.

Metric Description

Displays the metric ID that the system is using to track performance against the agreement. The field is available when the Result Type field value is *Metric.*

Values for the field include:

On-time Quantity Performance

On-time Receipt Performance

PO/Receipt Qty Performance (purchase order/receipt quantity performance)

Quality Performance

Quantity Performance

See Chapter 4, "Defining Contract Agreements," Metric Measurement Types, page 75.

Actual Result

Enter the actual results of the agreement prior to setting the status to *Compliant* or *Not Compliant.* The contract administrator uses this information to determine whether or not the terms of the agreement have been met.

Entries in the field depend on the result type. If the result type is Date, the Actual Result field expects a date format and the system displays a calendar. You can enter a date that represents, for example, when a milestone was reached. If the result type is Yes/No, then *Yes* and *No* values are available for selection. If the type is Monetary or Numeric, enter a numeric value. If the type is Text, the system displays an extended text field that is available for input.

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Cumulative Performance

Displays the most recent overall performance percentage for this contract. This field is available for display if you are using a metric measurement. The 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. The system displays *98%-Acceptable* as the cumulative performance for the supplier.

This value is also a link that you use to access the View Vendor Shipment Performance page. Using the page 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.

See Chapter 4, "Defining Contract Agreements," Steps for Implementing Metric Measurements with Agreements, page 78.

Perf Tolerance (performance tolerance)

Displays the tolerance allowed for this measurement. You establish this value when you assign the agreement to the contract. For example, a five percent performance tolerance for on-time deliveries combined with a negotiated result of 95 percent for the metric would imply 95 percent or better is acceptable, between 90 and 95 percent is considered a warning condition, and below 90 percent is unacceptable. 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 Chapter 4, "Defining Contract Agreements," Metric Measurements, page 74.

For Period

Displays the actual performance and status for the most recent period.

Target Date

Displays the target date. This is 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 enter the date automatically by calculating 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.

Last Metric Update

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 up-to-date 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.

Notification Comments

Enter up to 254 characters as a description of the agreement when the system sends worklist or email notifications.

Financial Implication

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.

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Compliance Comments Enter any text or explanation that you want to note regarding the agreement. This might include why the agreement was canceled or is considered not compliant. After the status is set to *Cancelled* or *Compliant*, you can no longer enter comments.

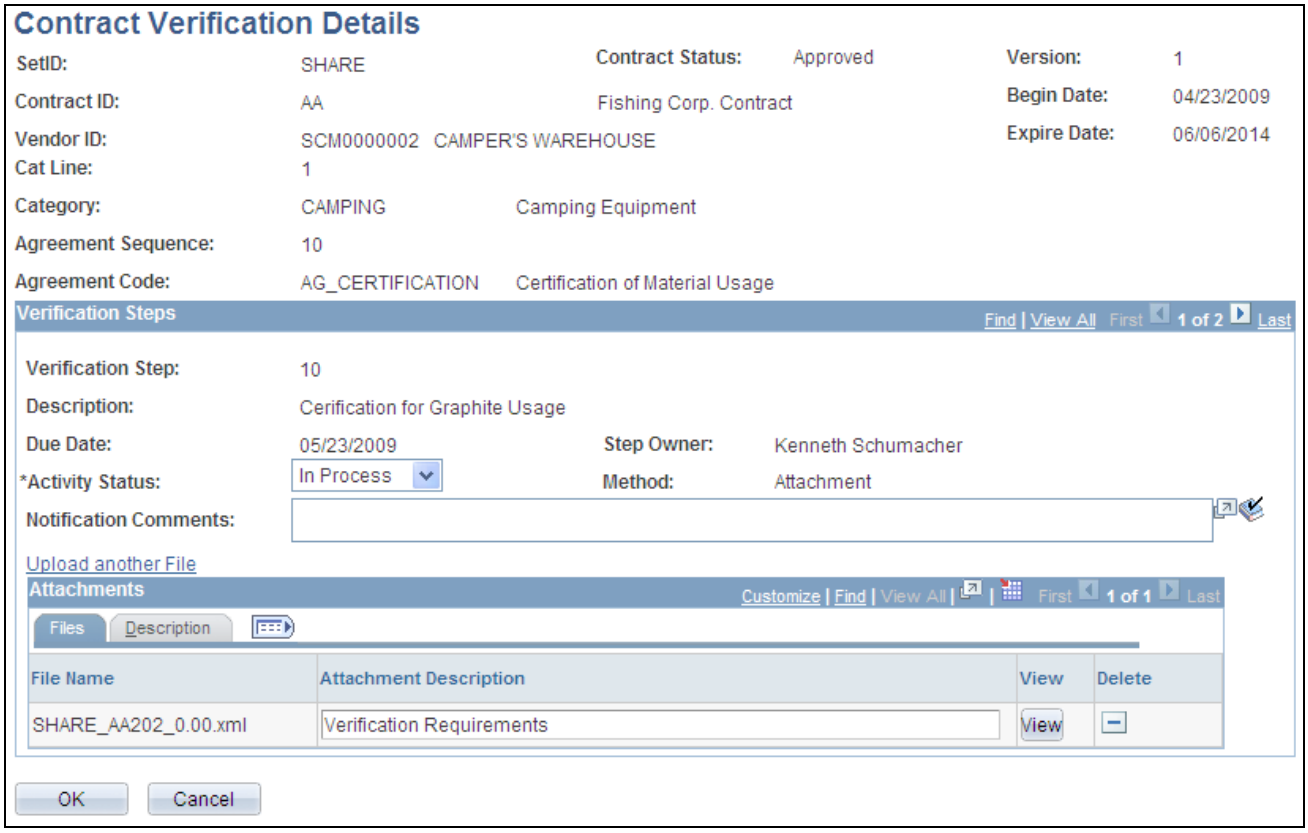
Contract Step Verification Click to access the step details where you can update the status, attach documents, or enter comments. The system displays this link when there are verification steps associated with the agreement.

See Chapter 5, "Managing Contract Agreements," Verifying Agreement Verification Steps, page 117.

Return to Contract Status Search Click to access the Update Agreement Statuses search page where you can perform a new agreement search.

Verifying Agreement Verification Steps

Access the Contract Verification Details page (click the Contract Step Verification link on the Update Agreement Statuses page).



Contract Verification Details page: Files tab

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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 already exist with the agreement, the Attachments grid also 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 view-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 so they can access and update only those verification steps (deliverables) that they have update authority to access.

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 Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Reviewing and Collaborating on External Documents, page 133.

Verification Step Displays the step number that defines the order in which the steps are listed. The system begins the numbering with 10, but you can change the sequence value to maintain the order when you insert new rows. The system uses the step value to help order and locate specific verification requirements.

Due Date Displays the date on which the step should be completed. You set this date when the agreement is added to the contract and you can based it on the agreement's target date. You cannot change the due date here, but must return to the Contract Maintenance pages and access the specific header or line agreement.

Step Owner Displays the name of the person assigned this task. The owner can be either an internal or external person.

Note. To update the status or information for external users, the user must be listed in the on the Notification Assignments page and have update access to the verification step. This ensures external users are notified and enables multiple external user access to individual verification steps. If there is a Draft version of the contract, the system keeps the verification information synchronized.

See *PeopleSoft Enterprise eSupplier Connection 9.1 PeopleBook*, "Maintaining Vendor Information."

See Chapter 6, "Maintaining Supply-Side Documents and Deliverables," page 131.

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Activity Status

Displays the current status for the step. When you add the agreement to the contract, the status is automatically set to Not Started. The step owner or contract administrator can use this status to track the progress of the step.

Values are:

Cancelled: Select to indicate that this step is no longer a requirement to meet the terms of the agreement. The step's activity status is automatically set to *Cancelled* if the agreement is canceled.

Completed: 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. Once set to complete, the associated fields are disabled and not accessible. You must set the status back to *Not Started* to update the appropriate fields.

Failed: Select to indicate the task was not completed to the satisfaction of the contract administrator or in accordance with the agreed upon terms.

In Process: Select this optional status to indicate that the task has started but has not yet been completed.

Not Started: Select to indicate that no action has begun for this task.

With each change of status, the Last User to Update and Last Update Timestamp fields are updated. The system also records the status change which triggers workflow notifications if the step is set up to notify interested parties with status changes. The notification occurs the next time the system runs the Workflow Notifications process.

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Method

Displays the verification method used to indicate the task has been completed. Methods include:

Attachment: Indicates that this step can be verified using an attachment. Upload any documents by clicking the Upload a File link. After a file has been attached to the verification step, the Attachments grid appears at the bottom of the page. You can add additional attachments by clicking the Upload another File link. If attachments are required and are not attached, the system displays a warning message if you set the activity status to Completed.

Comments: Indicates that you can make notations regarding the verification step. When this method is selected, a text box is available for input. If comments are not entered, the system displays a warning message when the activity status is set to Completed.

Date/Time: Indicates that a date and time stamp must be entered to verify that the step was completed. When you select this method, the Date Verified and Time Verified fields are available for input. If you do not enter a date and time, the system displays a warning message when the activity status is set to Completed.

Notify: Indicates that an action is not required to verify that the step has been completed. However, you can optionally notify someone when the status has changed.

System: Indicates that the Procurement History Update process provides verification information, such as percentages, for this step. 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 *System* as the verification method must exist for a contract agreement with a metric result type.

Yes/No: Select to indicate that a *Yes* or *No* response must be entered to verify that the task has been competed. Use the Yes/No Verification 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 set to Completed.

Notification Comments

Enter text that will appear in the workflow notification worklist if workflow is set up for the agreement.

Upload a Fileand**Upload Another File**

Click to browse for the attachment that you want to upload for this verification. After an attachment is uploaded, the system displays the Upload Another File link.

Uploading Attachments for Agreement Steps

Access the Contract Verification Details page (click the Contract Step Verification link on the Update Agreement Statuses page).

Use the Attachments grid 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.

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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. You might, for example, require a copy of the vendor's license or certifications that you can attach using this page. You can attach documents even if 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

To upload attachments:

1. Click the Upload a File link on the Contract Verification Details page. If a file already exists as an attachment, click the Upload another File link. Another page appears, where you can browse for the file to upload.
2. Click the Browse button to locate the file from an external system.
3. Select the file, and then click the Upload button.

   The attachment appears in the Attachment grid and includes a system-assigned sequence number. To view the uploaded attachment, click the View button.

File Name	Displays the name of the file as it was selected from the external location. You cannot change the file name here.
Attachment Description	Enter a description for the attachment.
View	Click to open the attachment.

Description

Access the Description tab.

Use the Document Description field to enter an expanded description of the document. You can enter up to 254 characters.

Updating Contract Procurement History

This section provides an overview of procurement updates and discusses how to run procurement updates.

Note. This section discusses running the procurement history update specifically for metric-related contract agreements.

Procurement Updates

Analyzing procurement data provides you with information about procurement trends and can assist you in managing vendor relationships. Supplier Contract Management enables you to use summaries of purchasing receipt transactions from PeopleSoft Purchasing to create metric definitions for assessment against contract agreements.

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Within PeopleSoft 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 payables business units or all business units as well as a 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 related specifically to the contracts and any system metric-related contract agreements you have defined. Within Supplier Contract Management, when you define a system-related agreement for the contract, the system automatically adds a reporting entity for you to collect the contract's purchase order receipt information. To access the reporting entity, select Purchasing, Analyze Procurement, Setup Profiles, Define Procurement Controls.

You run the Procurement History Update process for Supplier Contract Management 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 by contract.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Analyzing Procurement History," Defining Reporting Entities

Chapter 4, "Defining Contract Agreements," Using Agreement Metrics, page 73

Page Used to Update Contract Procurement History

Page Name	*Definition Name*	*Navigation*	*Usage*
Update Procurement Info	CS_RNCNTL_PRCR_UPD	Supplier Contracts, Monitor and Update Agreements, Update Procurement Info	Run procurement updates.

Running Procurement Updates

Access the Update Procurement Info page (Supplier Contracts, Monitor and Update Agreements, Update Procurement Info).

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, in turn, 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.

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.

SetID Select the setID for the procurement contracts for which you want to update history.

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Contract ID

Select the contract for which you want to generate procurement history. You can leave this field blank and instead enter a contract beginning date.

If you enter a date and a contract ID, the system clears the date when you run or save the Procurement History Update process.

Contract Beginning Date

If you leave Contract ID 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 here. This enables you to limit the gathering of metric information to just those contracts that are the most recent and pertinent for evaluation.

Note. If you select a contract ID, and then enter a date in the Contract Beginning Date field, the system clears the Contract Beginning Date field when you save or run the Procurement History Update process. The system also displays a warning when you select to save or run the process. You can either proceed with the action and run the process using the contract ID or return to the Update Procurement Info page and remove the contract ID to base the process on the date rather than contract ID.

Relative

Select this option to run the update process on a range of periods that are relative to the current period. The Start - Current Period Minus and End - Current Period Minus fields are available for entry when you select this option. This option is useful if you choose to schedule history updates. After you enter relative period information and save it here, the process runs with these parameters each time that the PeopleSoft Process Scheduler submits the process.

Start - Current Period Minus

Enter the number of periods before the start of the current periods at which you want to begin procurement history accumulation.

End - Current Period Minus

Enter the number of periods before the start of the current period at which you want to end procurement history accumulation.

Specify

Select this option to define a specific period range for which you want to generate procurement history data. The Start Period,Start Year,End Period, and End Year fields become available for entry when you select this option.

See Also

Chapter 4, "Defining Contract Agreements," Using Agreement Metrics, page 73

Monitoring Agreement Compliance

This section discusses how to:

- Define selection criteria for contracts to view.
- Monitor agreement compliance for contracts.

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- Review summary details for agreement statuses.

Pages Used to Monitor Agreement Compliance

Page Name	*Definition Name*	*Navigation*	*Usage*
Monitor Contract Agreements	CS_CNT_AG_MONITOR	Supplier Contracts, Monitor and Update Agreements, Monitor Agreement Compliance	Define selection criteria for contracts to view. The system displays the results of the search using the Status Summary grid.
Contract Agreement Status Details	CS_CNT_AG_DETAIL	Click a link in the returned results in the Status Summary grid.	Review details for agreement statuses.
Review Agreement Statuses	CS_CNT_AG_RESULTS	Click on a value in the Agreement Sequence and Code field on the Contract Agreement Status Details	Navigate to agreement information. See Chapter 5, "Managing Contract Agreements," Reviewing Agreement Statuses, page 129.

Defining Selection Criteria for Contracts to View

Access the Monitor Contract Agreements page (Supplier Contracts, Monitor and Update Agreements, Monitor Agreement Compliance).

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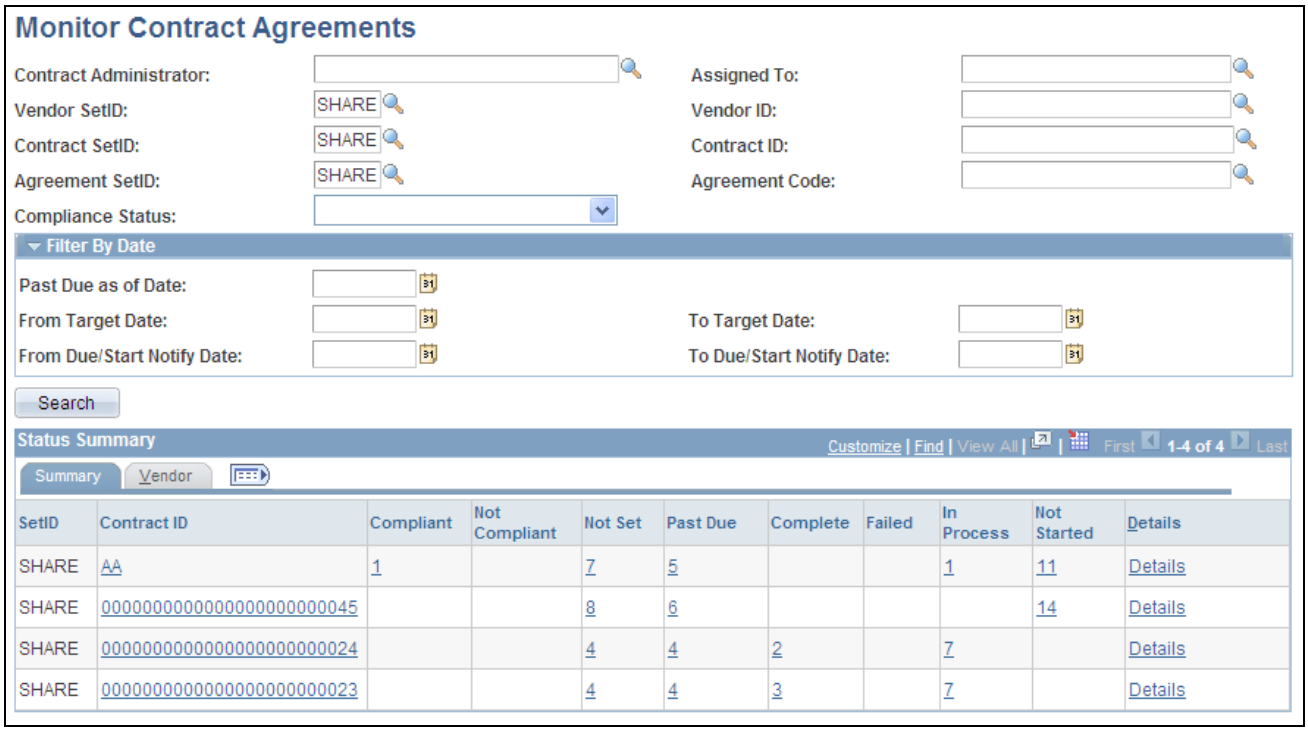

Monitor Contract Agreements page: Summary tab

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. The grid is described in the next section.

Monitoring Agreement Compliance for Contracts

Access the Monitor Contract Agreements page (Supplier Contracts, Monitor and Update Agreements, Monitor Agreement Compliance).

When you click a link for a status on this page, you access the Contract Agreement Status Details page.

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Contract ID	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 number link to access the Contract page where you can view and update header, item line, and category line agreement information.
Compliant	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.
Not Compliant	Displays the number of agreements that are not compliant. Click the link to access those agreements.
Not Set	Displays the number of agreements associated with this contract that have not had a change in status since they were originally added. They are not considered compliant, but they are not yet considered not compliant.
Past Due	Depending on what you entered in the Past Due as of Date field in the search selection criteria, this number can represent different values. 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 *Not Set.* However, you would need to be make a decision by the date specified as to whether the agreement is compliant. 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. 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.
Complete,Failed, In Process, and **Not Started**	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. There, the status of each individual step is displayed for each agreement.
Details	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.

Vendor

Select the Vendor tab.

Use this tab to review vendor information for contracts. The information includes the vendor ID and name. You can also access the contract to make changes to vendor information.

Reviewing Summary Details for Agreement Statuses

Access the Contract Agreement Status Details page (Supplier Contracts, Monitor and Update Agreements, Monitor Agreement Compliance, and click a link in the returned results in the Status Summary grid).

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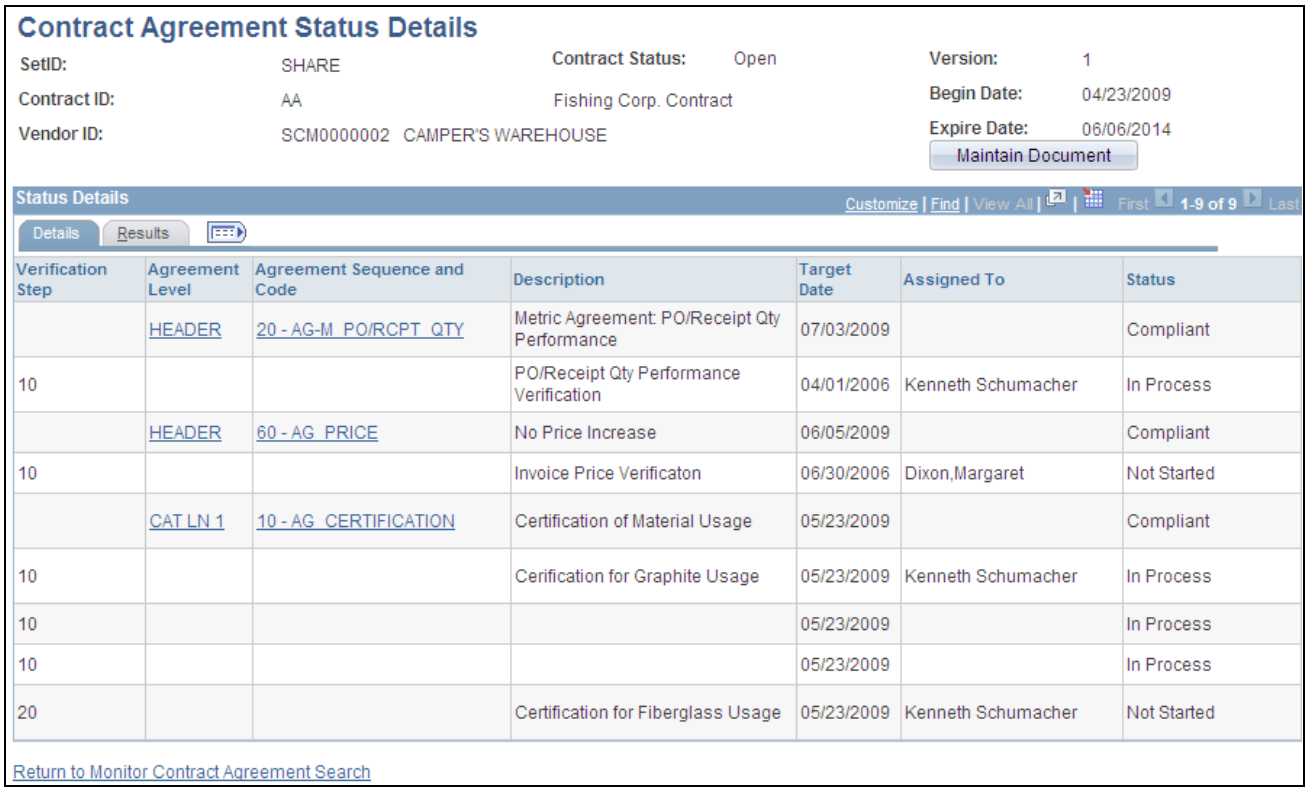

Contract Agreement Status Details

SetID:	SHARE	Contract Status:	Open	Version:	1
Contract ID:	AA	Fishing Corp. Contract		Begin Date:	04/23/2009
Vendor ID:	SCM0000002 CAMPER'S WAREHOUSE			Expire Date:	06/06/2014

Maintain Document

Status Details — Customize | Find | View All | First 1-9 of 9 Last

Details | Results

Verification Step	Agreement Level	Agreement Sequence and Code	Description	Target Date	Assigned To	Status
	HEADER	20 - AG-M_PO/RCPT_QTY	Metric Agreement: PO/Receipt Qty Performance	07/03/2009		Compliant
10			PO/Receipt Qty Performance Verification	04/01/2006	Kenneth Schumacher	In Process
	HEADER	60 - AG_PRICE	No Price Increase	06/05/2009		Compliant
10			Invoice Price Verificaton	06/30/2006	Dixon,Margaret	Not Started
	CAT LN 1	10 - AG_CERTIFICATION	Certification of Material Usage	05/23/2009		Compliant
10			Cerification for Graphite Usage	05/23/2009	Kenneth Schumacher	In Process
10				05/23/2009		In Process
10				05/23/2009		In Process
20			Certification for Fiberglass Usage	05/23/2009	Kenneth Schumacher	Not Started

Return to Monitor Contract Agreement Search

Contract Agreement Status Details: Details tab

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.

Maintain Document Click to access the Document Management page. This button is available when a document has been created for the contract.

Agreement Level Displays whether the agreement is at a header level, a line level or category-line level. 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 Agreement Sequence and Code 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.

Agreement Sequence and Code 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 Agreement Statuses page where you can review all the information about the agreement including its verification steps.

See Chapter 5, "Managing Contract Agreements," Reviewing Agreement Statuses, page 129.

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Verification Steps 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.

Description Displays a description of the corresponding agreement or verification step.

Target Date Displays the estimated completion date for the agreement or the due date for the verification step.

Assigned To Displays the person who is responsible for verifying the corresponding agreement verification step.

Status Displays the current state of the agreement or verifications step. Values for agreements are *Compliant,Not Compliant,* and *Not Set.* Values for steps are *In Process,Failed,Completed,* and *Not Started.*

Return to Monitor Contract Agreement Search Click to return to the search utility where you can define criteria for another search.

Results

Select the Results tab.

Use this tab to review the actual results of completing a verification step or meeting the terms of the agreement.

Line Released Amount 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.

Actual Result 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.

Cumulative Actual Performance 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.

See Chapter 5, "Managing Contract Agreements," Updating Agreement Statuses, page 113.

For Period Displays the actual performance and status for the most current period.

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Reviewing Contract Agreement Statuses

This section discusses how to:

- Review agreement statuses.
- Review agreement verification details.

Pages Used to Review Agreement Statuses

Page Name	*Definition Name*	*Navigation*	*Usage*
Review Agreement Statuses	CS_CNT_AG_SEARCH	Supplier Contracts, Monitor and Update Agreements, Review Agreement Statuses	Search for contracts agreements and verification steps you want to review. See Chapter 5, "Managing Contract Agreements," Defining Selection Criteria for Contracts to View, page 124.
Review Agreement Statuses	CS_CNT_AG_RESULTS	Supplier Contracts, Monitor and Update Agreements, Review Agreement Statuses	Review agreement statuses.
Contract Verification Details	CS_CLN_AG_VFY_UPD	Click the Contract Step Verification link on the Review Agreement Statuses page.	Review agreement verification details.

Reviewing Agreement Statuses

Access the Review Agreement Statuses page (Supplier Contracts, Monitor and Update Agreements, Review Agreement Statuses).

Use this page to review information about agreements for a single contract. You cannot make changes to data using the page. You can navigate to review agreements and their verification step details.

You can also access this page using the Monitor Contract Compliance component.

See Also

Chapter 5, "Managing Contract Agreements," Monitoring Agreement Compliance for Contracts, page 125

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Reviewing Agreement Verification Details

Access the Contract Verification Details page (click the Contract Step Verification link on the Review Agreement Statuses page).

Use this page to review details about verification steps for a contract agreement.

You can also access this page using the Monitor Contract Compliance component.

See Also

Chapter 5, "Managing Contract Agreements," Reviewing Summary Details for Agreement Statuses, page 126

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Chapter 6

Maintaining Supply-Side Documents and Deliverables

This chapter provides an overview of external users and document collaboration, contract deliverable verification steps, and discusses how to:

- Review and collaborate on external documents.
- Sign external documents.
- Update external contract deliverable verification steps.
- Review external contract deliverable verification steps.

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 PeopleBooks:

See *Enterprise PeopleTools PeopleBook: System and Server Administration.*

See *Enterprise PeopleTools PeopleBook: Internet Technology.*

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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 *PeopleSoft Enterprise eSupplier Connection 9.1 PeopleBook*, "Maintaining Vendor Information."

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," page 195.

See Chapter 13, "Managing Document Life Cycles," page 463.

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 vendor 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.

See Also

Chapter 13, "Managing Document Life Cycles," Collaborating on Documents, page 542

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.

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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.

See Also

Chapter 13, "Managing Document Life Cycles," Sending Documents to Internal and External Contacts, page 558

Reviewing and Collaborating on External Documents

This section provides an overview of external collaboration and discusses how to:

- Search for external documents.
- Collaborate on external documents.
- View attachments and related authored documents.
- View external document details.
- View external document history.
- View external collaboration history details.
- 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 2003 or a later version, the system makes the .xml document available for collaboration. The external user must be using a version of Microsoft Word that supports the 2003 .xml format. When using Microsoft Word 2003, external users must be using the Professional version of Microsoft Word to support the custom tags the system includes in the document. This maintains the document's capability for checking in the document.

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When using Microsoft Word 2003 Professional or Microsoft Word 2007 (stored in Microsoft .xml 2003 format), 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.

Pages Used to Maintain External Contract Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Search	CS_DOC_SRCH_EXT	Manage Contracts, Maintain Contract Documents	Search for external contract documents. **Note.** External pages are designed for external system access and are available only on the supplier portal registry where *SUPPLIER* is in the URL instead of *EMPLOYEE.*
Document Management	CS_DOC_SUPP	Manage Contracts, Maintain Contract Documents Click the Document link on the Document Search page.	Maintain and collaborate on external contract documents.
Attachments and Related Authored Documents	CS_DOC_SUPP_ATT	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.	View attachments and related authored documents for external documents.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Document Details	CS_DOC_SUPP_DET_SP	Manage Contracts, Maintain Contract Documents Click the Contract Document link on the Document Search page, and then click the Documents Details link on the Document Management page.	View external document details.
Document History	CS_DOC_SUPP_HST_SP	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.	View external document history.
External Collaboration History Details	CS_DOC_SUPATT_SP2	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 click the Collaboration Details button on the Document History page.	View external collaboration history details.
Send E-mail	CS_DOC_EMAIL_EXT	Manage Contracts, Maintain Contract Documents Access a document, and click the Send E-Mail link on the Document Management page.	Send email to contract administrators and other external users.

Searching for External Documents

Access the Document Search page (Manage Contracts, Maintain Contract Documents, and click the Document link on the Document Search page).

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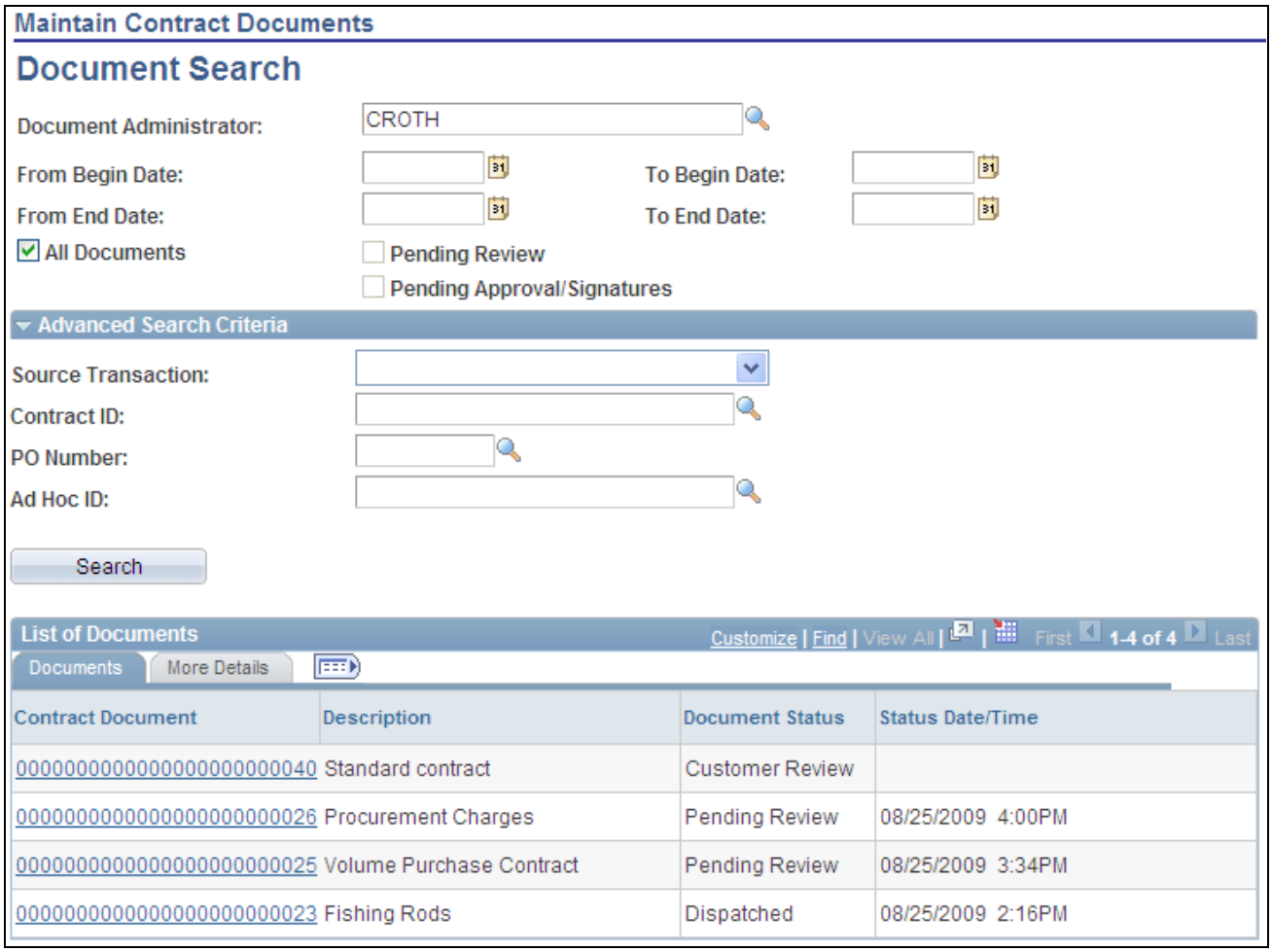

Document Search page for suppliers

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.

Document Administrator 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.

From Begin Date,To Begin Date,From End Date,and **To End Date** 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.

All Documents 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 All Documents check box, the system inactivates the Pending Review and Pending Approval Signatures check boxes.

Note. 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.

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Pending Review 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.

Pending Approval/Signatures 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.

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 *Other* 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.

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More Details

Select the More Details tab.

This tab displays additional contract document information.

Begin Dateand**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.
Vendor 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.

Maintaining and Collaborating on External Documents

Access the Document Management page (Manage Contracts, Maintain Contract Documents, and 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.

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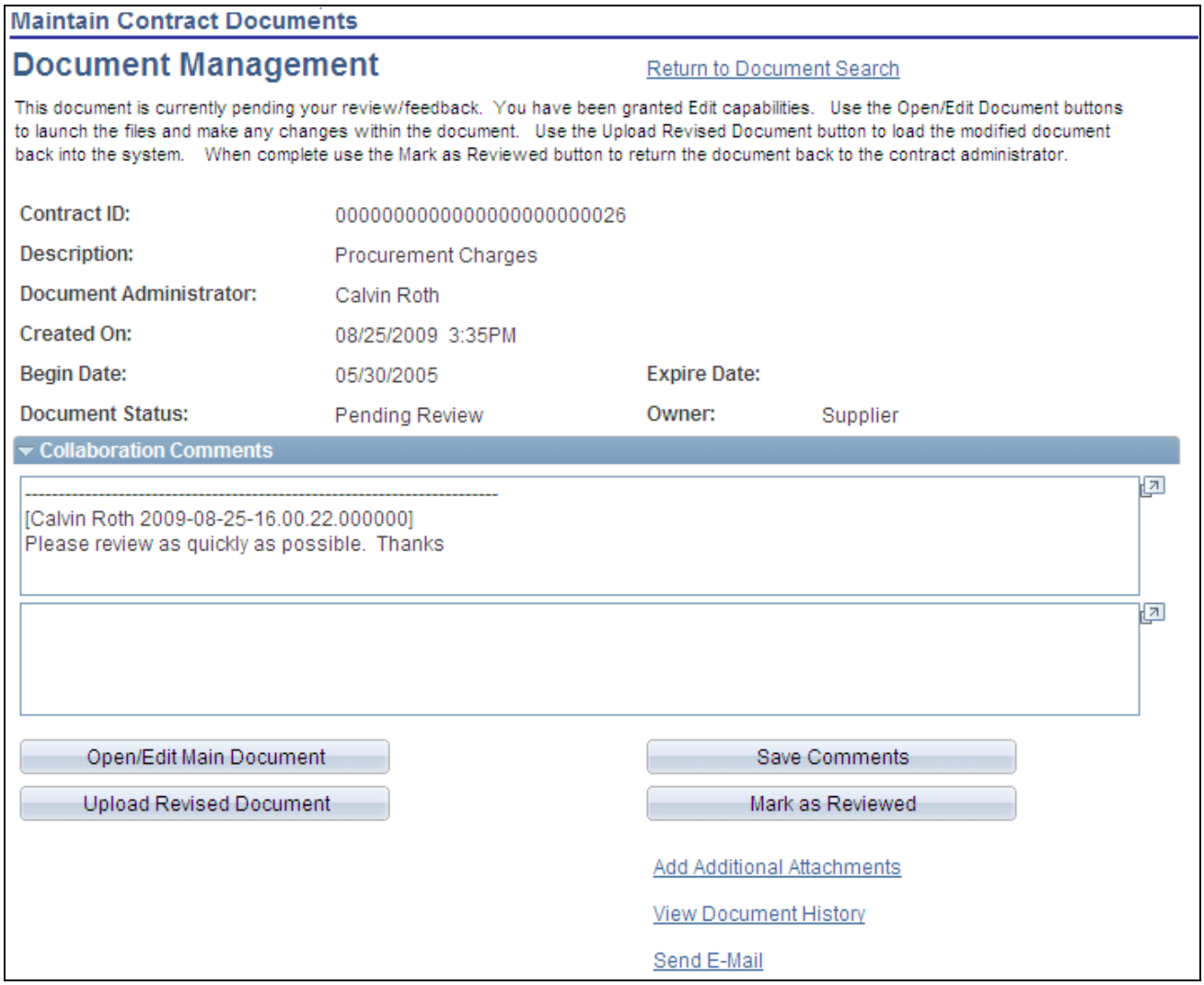

Document Management page for suppliers

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 indication 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.

Open/Edit Main Document

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.

After you finish editing the Microsoft Word document, you must save the document as an .xml document type.

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Upload Revised Document

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.

Note. The uploading of the document does not delete the local files from the client machine. You should delete these files periodically.

View Main Document (Info Only)(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.

Save Comments

Click to access the comments that you entered in the Collaborator Comments section.

Mark as Reviewed

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.

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 All Documents check box and click the Search button.

Add Additional Attachments

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 View/Add Attachments/Related Documents button. Attachments can then be reviewed internally by the document specialist before accepting them into the system

View Document History

Click to access the Document History page. You use this page to view history information to which you have access.

See Viewing Attachments and Related Authored Documents

View Last Executed Main Document

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.

View Attachments/Related Documents

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 Viewing Attachments and Related Authored Documents

No Attachments/Related Documents Exist

This information appears when there are not any document attachments or related documents.

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Document Details	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 Viewing Document Details
Send E-Mail	Click to access the Send E-Mail page. You use this page to notify the administrator and other external users about the document. See Sending Email to Administrators and External Users

Buttons that are available on this page include:

Return Without Signing	Click to return the document without signing. This .
View Main Document (Info Only)	Click to open the last executed version of this contract document.
View Document	Click to open the last executed version of this contract document.
View Last Executed Main Document	Click to open the last executed version of this contract document.
View Last Executed Amendment File	Click to open the last executed version of this contract document.
View Last Executed Main Document	Click to open the last executed version of this contract document.
Upload Signed Document	Click to place the document back into the signature process.
Upload Signed Amendment File	Click to place the document back into the signature process.

Viewing Attachments and Related Authored Documents

Access the Attachments and Related Authored Documents page (click theView 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.

See Also

Chapter 13, "Managing Document Life Cycles," Viewing and Uploading Attachments and Related Documents, page 554

Viewing External Document Details

Access the Document Details page (click the Document Details link on the Document Management page).

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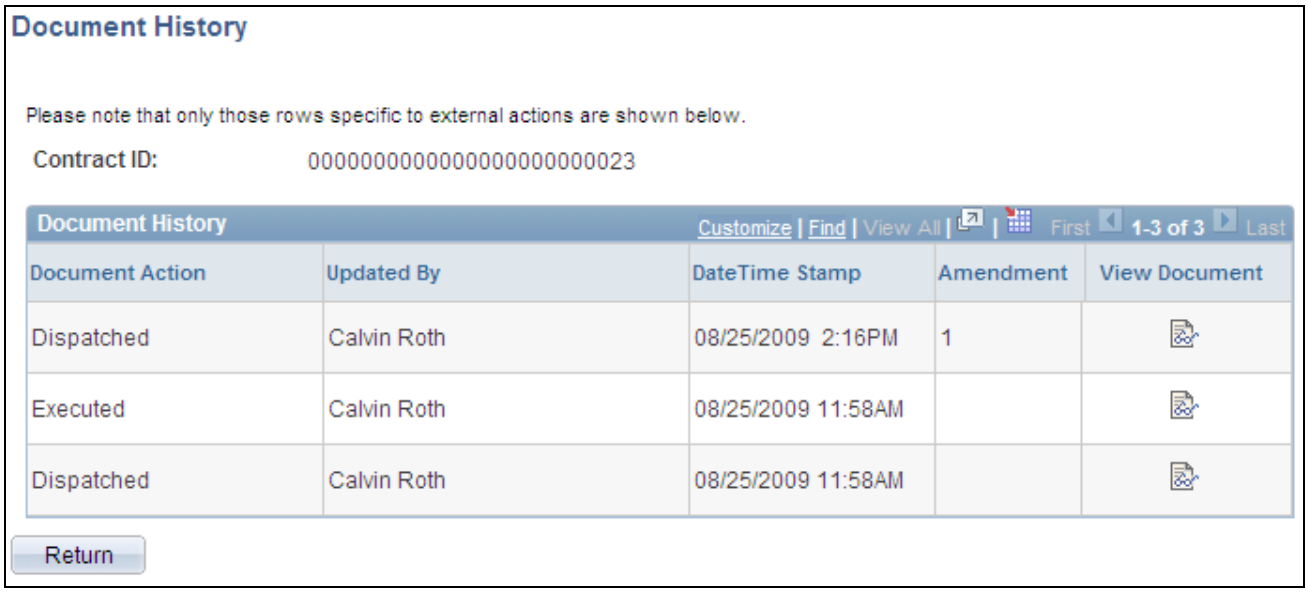
This page provide a listing of interested parties that have been defined by the contract administrator.

See Also

Chapter 13, "Managing Document Life Cycles," Maintaining Document Details, page 519

Viewing External Document History

Access the Document History page (click the View Document History link on the Document Management page).



Document History page for suppliers

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 PeopleSoft Supplier Contract Management Installation Options 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.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Processing Options, page 231.

Document Action 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.

Updated By Displays who performed the action against the document.

Date/Time Stamp Displays when the action took place for updated version history for the document.

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Amendment	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.
View Document	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.

Viewing External Collaboration History Details

Access the External Collaboration History Details (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 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.

View Document	Click to open the collaborated document. This button appears when the document has not been edited.
View Revised Document	Click to open the collaborated document to view updates and changes that have been made to the document.
File Name	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.
Titleand **Document Description**	Display the name and description of the proposed attachment. You assign these when you upload the attachment.
Date Time Stamp	Displays the date and time for when an action was performed against the document.
View	Click to view the proposed attachment for the collaborated document. You cannot make updates to the proposed document.

Sending Email to Contract Administrators and Other Supply-Side Users

Access the Send E-Mail page (click the Send E-Mail link on the Document Management page).

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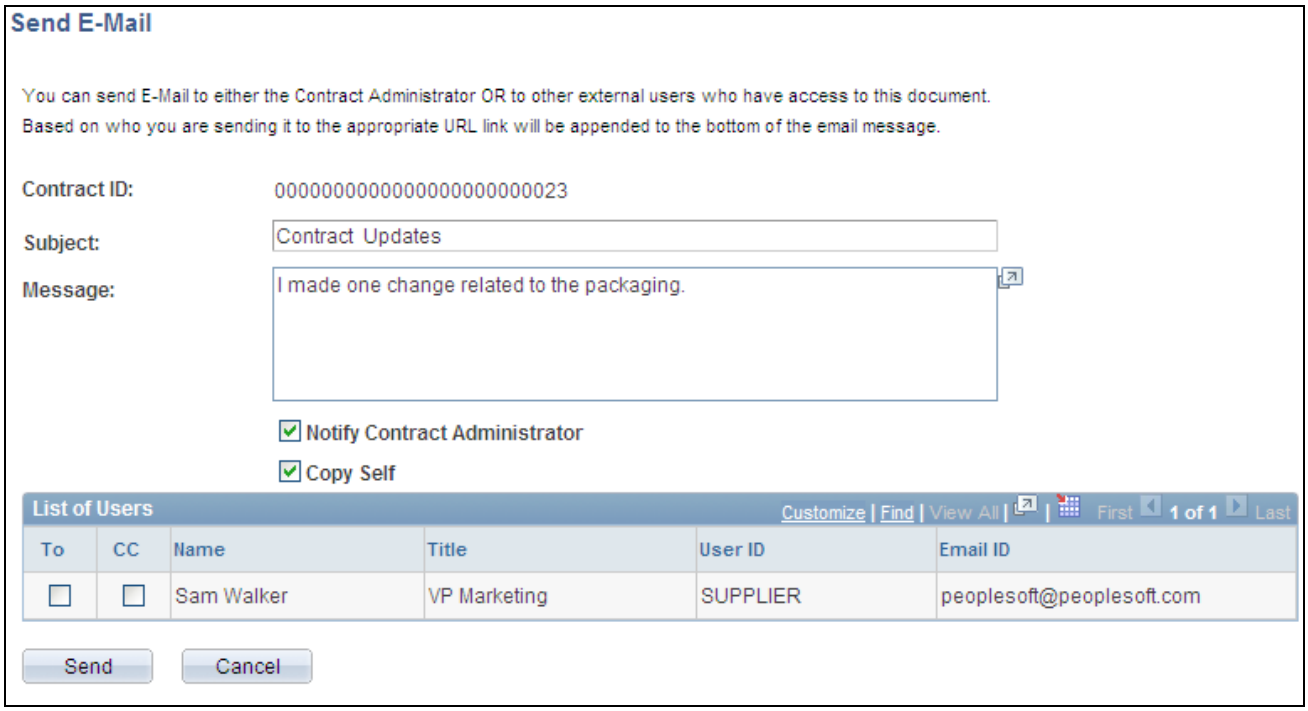

Send E-Mail page for suppliers

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.

Subject Enter the main topic of the email.

Message Enter the text of the email.

Notify Contract Administrator Select to send a copy of this email to the internal contract administrator.

Copy Self 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

This section provides an overview of external document signatures and discusses how to sign external documents using digital signatures.

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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, 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 for the signature method, all external users providing signatures are required to use Microsoft Word 2007.

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 Chapter 13, "Managing Document Life Cycles," Preparing Documents for Signature, page 581.

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 Chapter 13, "Managing Document Life Cycles," Routing Documents for Internal Signatures, page 582.

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 Chapter 13, "Managing Document Life Cycles," Using Document-Related Pagelets, page 588.

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.

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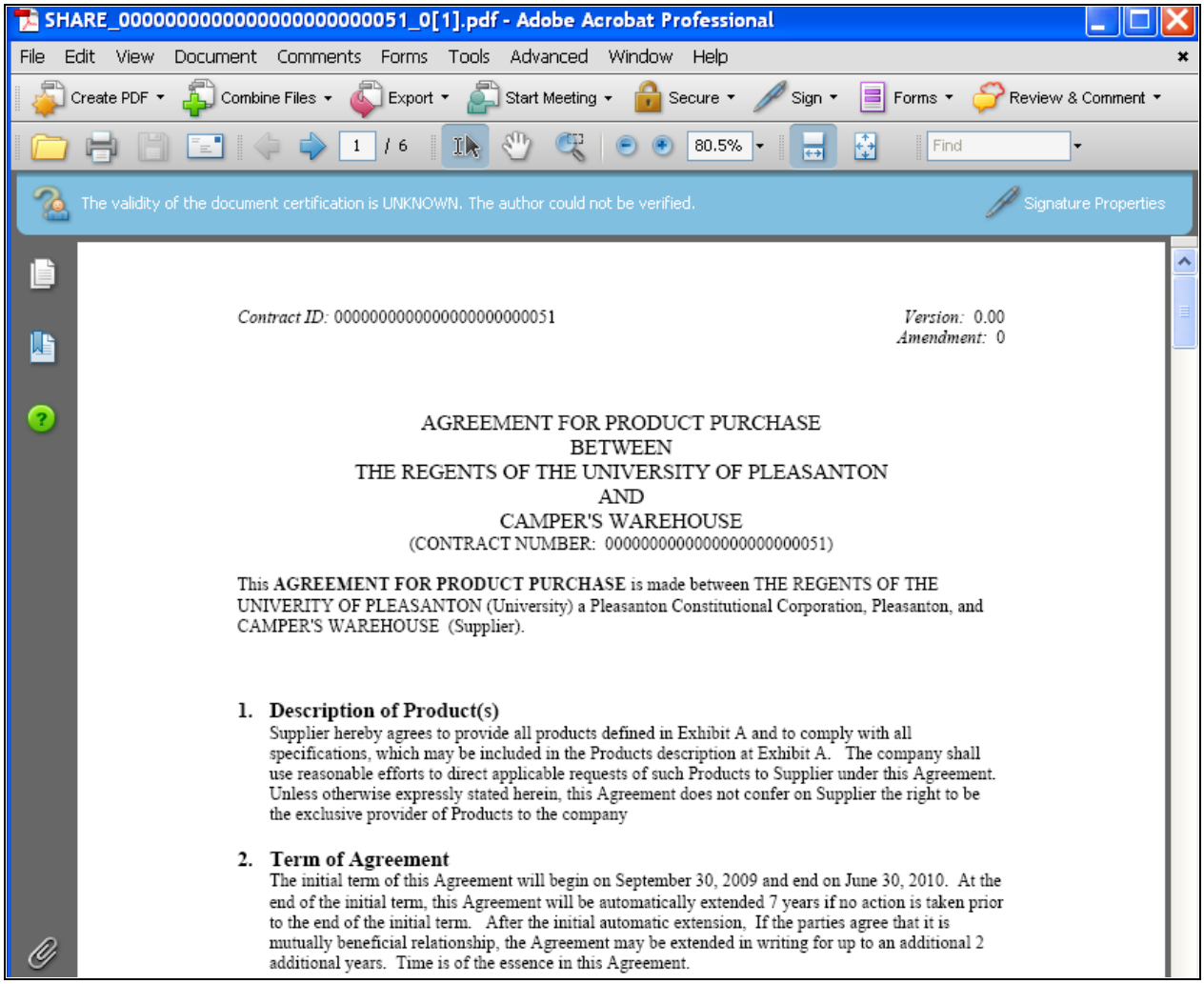
3. Click the Open Main Document for Signing button.

   The system opens the document using the Microsoft Word or Adobe Acrobat program. This example illustrates how the a PDF appears when it opens:



Example of Adobe Acrobat PDF for signature

   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 the "Managing Document Life Cycles" chapter.

See Chapter 13, "Managing Document Life Cycles," Signing Documents Using Digital Signatures, page 572.

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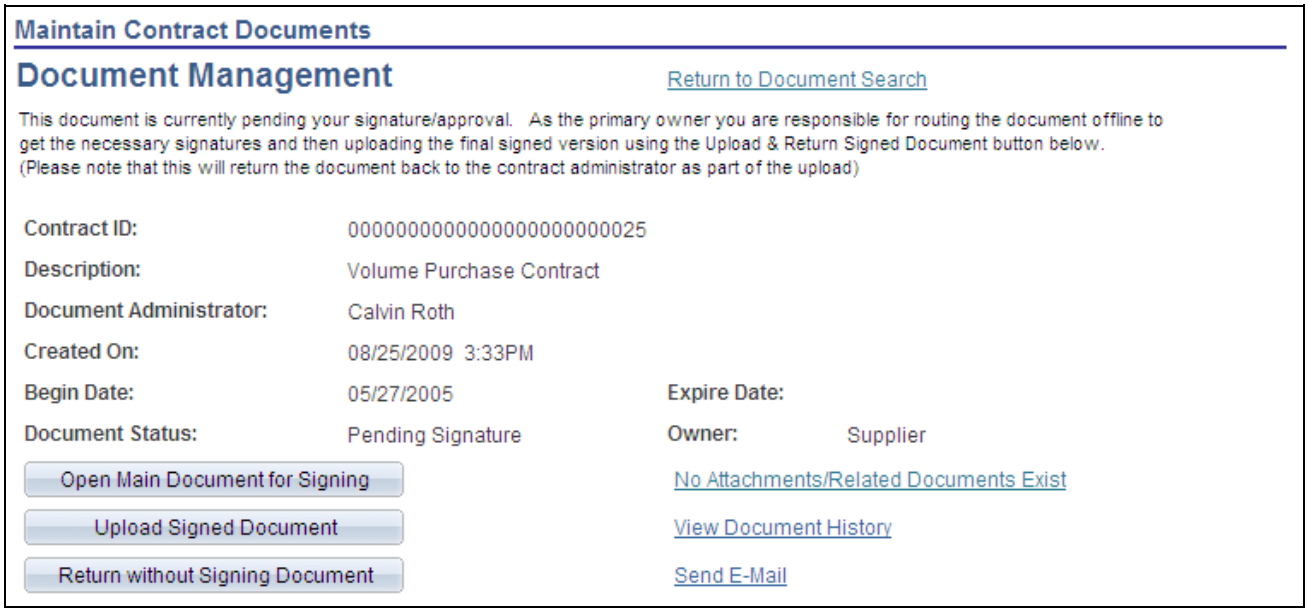
Pages Used to Sign External Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Management	CS_DOC_SUPP	Manage Contracts, Maintain Contract Documents Click a document link that requires your signature.	Sign external documents using digital signatures.
Return Document Without Signing	CS_DOC_ACTIONS_SP	Click the Return Document Without Signing button on the Document Management page.	Return a document without signing. You can also provide comments about the document.

Signing External Documents Using Digital Signatures

Access the



Document Management page

Use this page to work with document signatures.

Document Status Displays the document status. The value for the field when the document is waiting for your signature is *Pending Signature.* After uploading the signed document, the system set the status to Signed.

Owner Displays the user ID who is responsible for signing the document.

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Open Main Document for Signing 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 Chapter 13, "Managing Document Life Cycles," Signing Documents Using Digital Signatures, page 572.

Upload Signed Document Click to upload the document after you have received other external signatures and have affixed your (the external document owner) digital signature.

Return without Signing Document 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.

See Also

Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Reviewing and Collaborating on External Documents, page 133

Maintaining External Contract Deliverables

This section provides an overview about external contract user access and discusses how to:

- Search for contract deliverables.
- Review contract deliverables.
- Maintain agreement 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.

Pages Used to Maintain External Contract Deliverables

Page Name	*Definition Name*	*Navigation*	*Usage*
Search Deliverables	CS_CNT_AG_SEARCH	Manage Contracts, Update Contract Deliverables	Search for contract deliverables.

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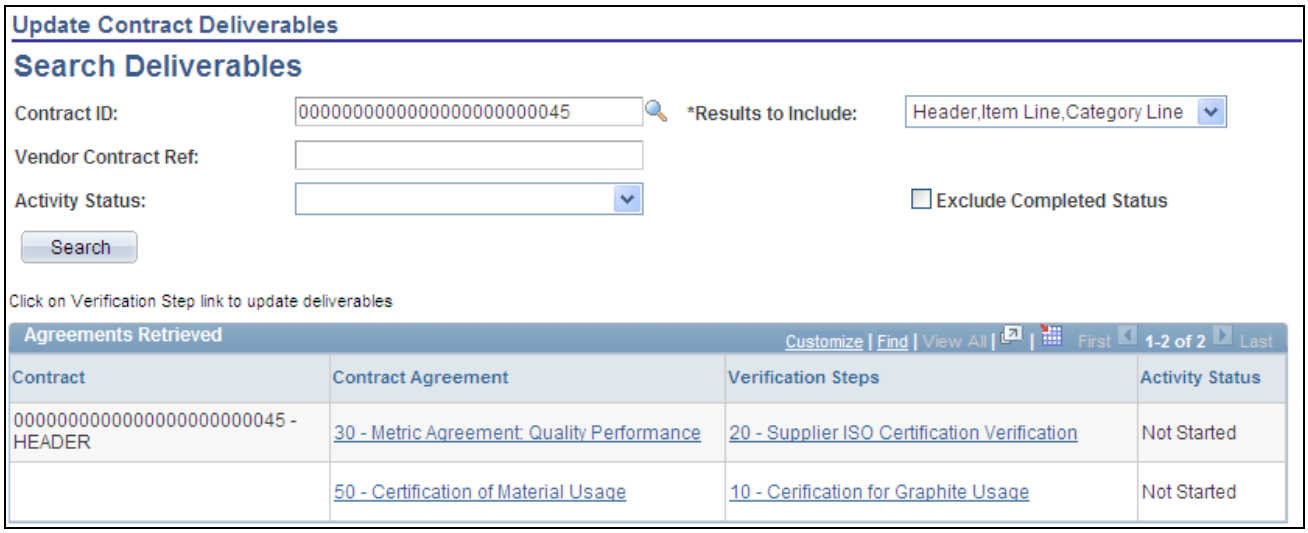
Page Name	Definition Name	Navigation	Usage
Review Agreement	CS_CNT_AG_RESULTS	Manage Contracts, Update Contract Deliverables Click the Contract Agreement link on the Search Deliverables page.	Review contract deliverables.
Update Verifications	CS_SS_CNT_VFY	Manage Contracts, Update Contract Deliverables Click the Verifications Steps link on the Search Deliverables page.	Updating deliverable verification steps.

Searching for Contract Deliverables

Access the Contract Deliverables page (Manage Contracts, Update Contract Deliverables).



Review Contract Deliverables - Search Deliverables page

Contract ID Select a contract ID on which to base the agreements search.

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Results to Include Select the search value that you want to use to locate contract agreements. Values include:

Category Line Agreements Only: Select to retrieve agreements assigned at the category line.

Header Agreements Only: Select to retrieve agreements assigned at the header level.

Header, Item Line, Category Line: 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.

Item Line Agreements Only: Select to retrieve agreements assigned at the contract line level.

Vendor Contract Ref (vendor contract reference) Enter a vendor 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 vendor contract reference and that have agreements associated with them. You define the reference on the contract header.

Activity Status Select a status on which to base the search. This is the current status for the step. Values include:

Completed: Select to search for verification steps that have been completed. The search results include completed steps that meet other search criteria you enter.

Failed: 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.

In Process: Select search for verification steps that have been started but are not yet been completed.

Not Started: Select to search for verification steps for which action has not begun.

Exclude Completed Status 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.

Contract Displays the contract and the contract part to which the agreement belongs, such as the header or contract line.

Contract Agreement Click to access the Review Agreement page.

Verification Steps Click to access the Update Verifications page. You use this page to update those verification steps for which you are the step owner.

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Activity Status Displays the agreement status, such as whether it is not started or is in process.

See Chapter 5, "Managing Contract Agreements," page 109.

Reviewing Contract Deliverable Verification Steps

Access the Update Contract Deliverables - Review Agreement page (Manage Contracts, Update Contract Deliverables, click the Contract Agreement link on the Search Deliverables page).

Review Contract Deliverables - Review Agreements page

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 vendor 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.

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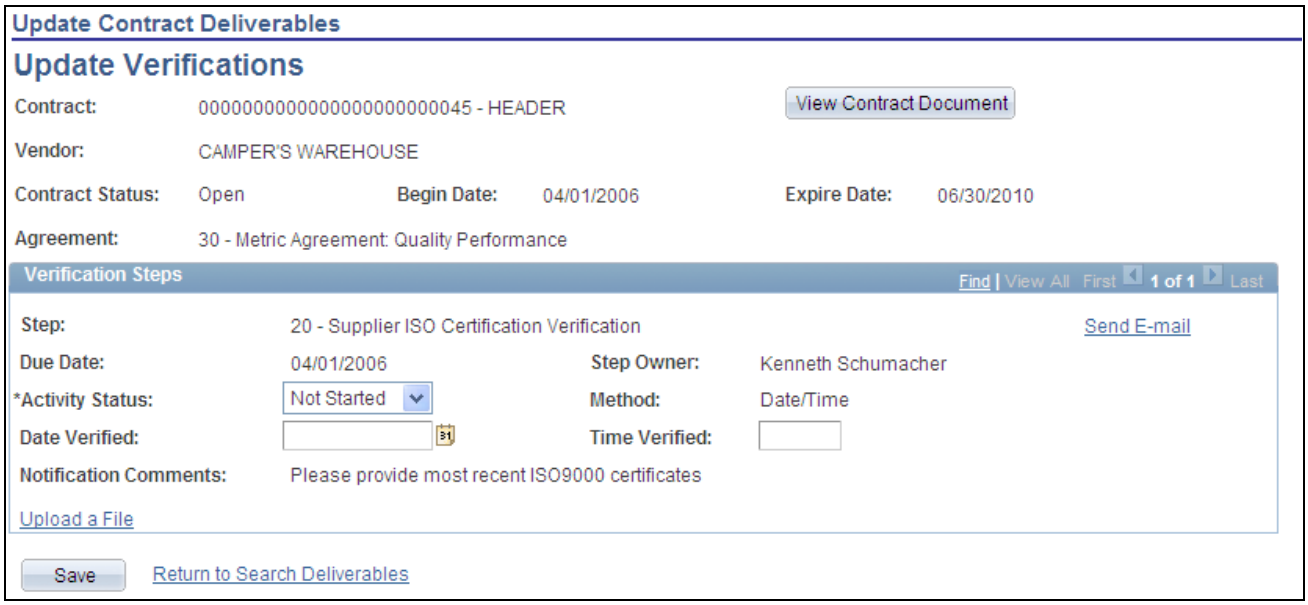
See Also

Chapter 4, "Defining Contract Agreements," Predefining Agreements, page 84

Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Reviewing Contract External Deliverable Verification Steps, page 155

Updating Deliverable Verification Steps

Access the Update Verifications page (Manage Contracts, Update Contract Deliverables, and click the Verifications Steps link on the Search Deliverables page).



Review Contract Deliverables - Update Verifications page

You 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.

Note. If you are the external step owner, you can use the an email link to access this page. The body of the email message contains the link that you use to access the PeopleSoft system. You must have the authorization to access the system.

The header information includes the contract and agreement identifier, the contract status, and begin and expire dates. Depending on the type of agreement that you are updating, the available fields on the page might be different.

View Contract Document Click to access the Document Management page where you can view information about the contract document, including its history and collaboration details.

See Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Maintaining and Collaborating on External Documents, page 138.

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Contract Displays the contract ID along with the contract agreement element, such as the header, line, or category.

Vendor Displays the vendor ID associated with the contract agreement.

Category Displays the item category to which the agreement was assigned. This field appears for category-level agreements.

Item ID 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.

Step Displays the step sequence along with the step description.

Send E-mail Click to send an email to the verification step owner.

Due Date Displays when the verification is required to be complete.

Step Owner Displays the external step owner.

Last User to Update Displays the step sequence along with the step description.

Last Update Displays the step sequence along with the step description.

Activity Status 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:

Completed: 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.

Note. 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.

Failed: Select to indicate the task is not completed in accordance with the agreed upon terms.

In Process: Select to indicate that the task has started but has not yet been completed.

Not Started: Select to indicate that no action has begun for this task.

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Method Displays the method by which a verification step owner indicates that a verification step has been completed. Verification methods include:

Attaching Supporting Documents: 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 Upload a File link to attach a supporting document. Click the Upload another File link to add additional attachments when an attachment exist for the verification step.

Comments: Indicates that you can verify the step by entering text or comments.

Date/Time Stamp: Indicates that you need to include a date and time stamp when the step is complete.

Notify: 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.

Yes/No: Indicates that you can update the verification step online using a yes or no response.

*System:*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.

See Chapter 4, "Defining Contract Agreements," Using Agreement Metrics, page 73.

Yes/No Verification Select either *Yes* or *No* to indicate the verification status. This field is available when the Method field is a *Yes/No* verification.

Notification Comments Enter any additional information that you want to provide to the contract administrator or manager about this verification step.

Verification Comment Enter the justification comments for this verification step.

Upload a Fileand**Upload 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.

See Also

Chapter 5, "Managing Contract Agreements," Updating Agreement Statuses, page 110

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Reviewing Contract External Deliverable Verification Steps

This section discusses how to review contract performance:

- Review external deliverable verification steps.
- Review contract performance.

Pages Used to Review Contract External Deliverable Verification Steps

Page Name	*Definition Name*	*Navigation*	*Usage*
Deliverables Search	CS_DOC_SRCH_EXT	Manage Contracts, Review Contract Deliverables	Search for contract deliverables.
Review Contract Deliverables - Review Agreement	CS_CNT_AG_RESULTS	Manage Contracts, Review Contract Deliverables Click the Contract Agreement link on the Search Deliverables page.	Review contract agreement details. See Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Updating Deliverable Verification Steps, page 152.
Review Contract Deliverables - Review Verifications	CS_SS_CNT_VFY	Manage Contracts, Review Contract Deliverables Click the Verification Steps link on the Search Deliverables page.	Review verification step details. See Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Updating Deliverable Verification Steps, page 152.
Review Contract Deliverables - Review Agreement	CS_CNT_AG_RESULTS	Manage Contracts, Review Contract Deliverables Click the Contract Agreement link on the Search Deliverables page.	Review contract performance. See Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Updating Deliverable Verification Steps, page 152.

Reviewing External Deliverable Verification Steps

Access the Review Contract Deliverables - Review Agreement page (Manage Contracts, Review Contract Deliverable, and click the Verification Steps link on the Search Deliverables page).

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Reviewing Contract Performance

Access the Update Contract Deliverables - Update Verifications page.

You can view detailed metrics performance related to agreements using this page 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.

Note. Certain setup requirements are needed and the Update Procurement process for the contract must be run before metric information is available for viewing.

See Also

Chapter 5, "Managing Contract Agreements," Reviewing Contract Agreement Statuses, page 129

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Chapter 7

Syndicating Supplier Contracts and Contract Messaging

This chapter provides an overview of contract syndication and discusses how to:

- Set up contract syndication.
- Defining contracts for syndication.
- Syndicate supplier contracts.
- Capture parent activities.
- Publish outbound messages.
- Review contract activities.
- Inbound contract messaging and exceptions.
- Load contracts into the parent system.

Understanding Contract Syndication

This section 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.

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 Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Loading Contracts into the Parent System, page 191.

  Note. This chapter describes 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 vendors, 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.

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 flowchart describes the syndication flow of a contract between parent and remote or child systems:

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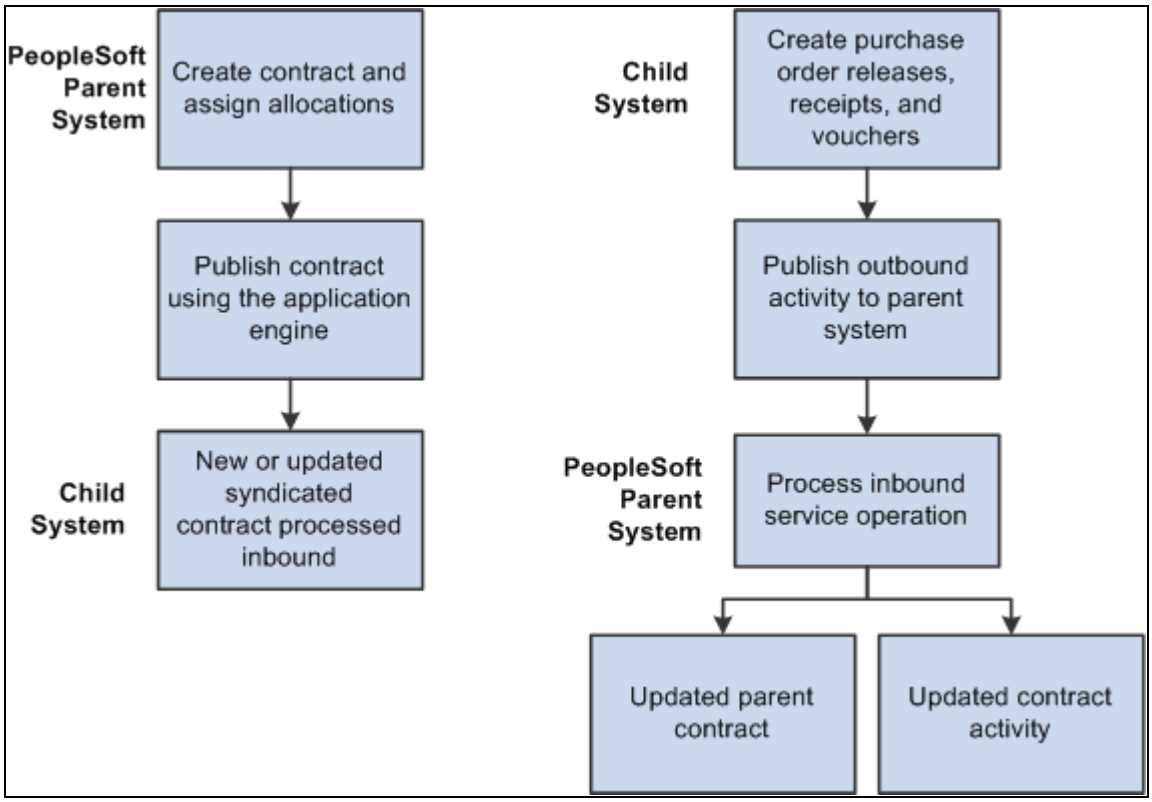

Syndication flow

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.

See Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Setting Up the Parent System, page 162.

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:

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- 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.

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.

See Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Contract Syndication Enterprise Integration Points, page 162.

Contract Syndication Steps

This section 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 Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Setting Up Contract Syndication, page 162.

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 Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Defining Contracts for Syndication, page 165.

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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.

   See Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Syndicating Supplier Contracts, page 172.

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 Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Capturing Parent Activities, page 178.

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 Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Reviewing Contract Activities, page 185.

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 Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Publishing Outbound Messages, page 182.

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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.

Setting Up Contract Syndication

To define nodes, use the Node Definition component (IB_NODE).

This section provides setup requirements.

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. The next sections describe the setup requirements for using the parent and remote systems.

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, *Enterprise PeopleTools PeopleBook: Integration Broker*.

Use these steps to set up the parent system:

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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 Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Loading Contracts into the Parent System, page 191.

   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,"*Enterprise PeopleTools PeopleBook: Integration Broker*

   g. Ensure that *Active* is selected in the Status field on the Handlers tab, and click the Save button.

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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, "Appendix: Integration Scenarios," *Enterprise PeopleTools PeopleBook: 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," *Enterprise PeopleTools PeopleBook: 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.*

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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.

      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.

      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.

6. Use the Installation Options page to set up the application for syndication use.

   See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Installation Options for PeopleSoft Supplier Contract Management, page 223.

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.

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.

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.

Defining Contracts for Syndication

This section discusses how to:

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- Create a new contract and process option.
- Enter syndication details.
- Create releases against syndicated contracts.
- View staged releases for syndicated contracts.
- View syndicated line released details.
- View syndicated category line released details.

Pages Used to Define Contracts for Syndication

Page Name	*Definition Name*	*Navigation*	*Usage*
Contract Entry	(search)	Supplier Contracts, Create Contracts and Documents, Contract Entry	Create a new contract and process option.
Contract	CNTRCT_HDR	Supplier Contracts, Create Contracts and Documents, Contract Entry Click the Add button on the search page.	Enter syndication details.
Create Release	CNTRCT_SCHEDULE	Supplier Contracts, Create Contracts and Documents, Contract Entry Click the Contract Releases link on the Contract page.	Create releases against syndicated contracts.
Review Releases	CNTRCT_RLS_HIST	Select the Review Releases tab on the Create Releases page.	View staged releases for syndicated contracts.
Contract Item Release Details for Line	CS_LINE_RLSD_SEC	Supplier Contracts, Create Contracts and Documents, Contract Entry Select the Release Amounts or Release Quantities tab in the Contract Items Lines grid on the Contract page. Click the Released Details link.	View syndicated line released details.

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Page Name	Definition Name	Navigation	Usage
Contract Category Release Details for Line	CS_CAT_RLSD_SEC	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.	View syndicated category line released details.

Creating a New Contract and Process Option

Access the Contract Entry search page (Supplier Contracts, Create Contracts and Documents, Contract Entry).

Use this page to create a new contract or find an existing contract. When you create a new contract, you can assign a name and a process option for the contract. When you create a new contract, the process option you select influences how the system syndicates the contract.

Process options determine a specific contract process that a contract uses throughout its entire contract life cycle. Depending on the process option, you can either syndicate the contract to multiple remote systems or to a single remote system.

Use the Contract ID field to enter an ID for contract. The default value for the field is *NEXT*. Using the default value, the system automatically assigns the next available system ID to the contract.

Select an option in the Contract Process Option field. Values are:

- *General Contract:* When you syndicate a contract that uses this process option, you can only send the contract to a single remote system.
- *Prepaid Voucher:* When you syndicate a contract with this process option, you can only send the contract to a single remote system.
- *Prepaid Voucher with Advanced PO:* 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.
- *Purchase Order:* 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.
- *Recurring PO Voucher:* 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.
- *Recurring Voucher:* When you syndicate a contract that uses this process option, you can only send the contract to a single remote system.
- *Release to Single PO Only:* 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.

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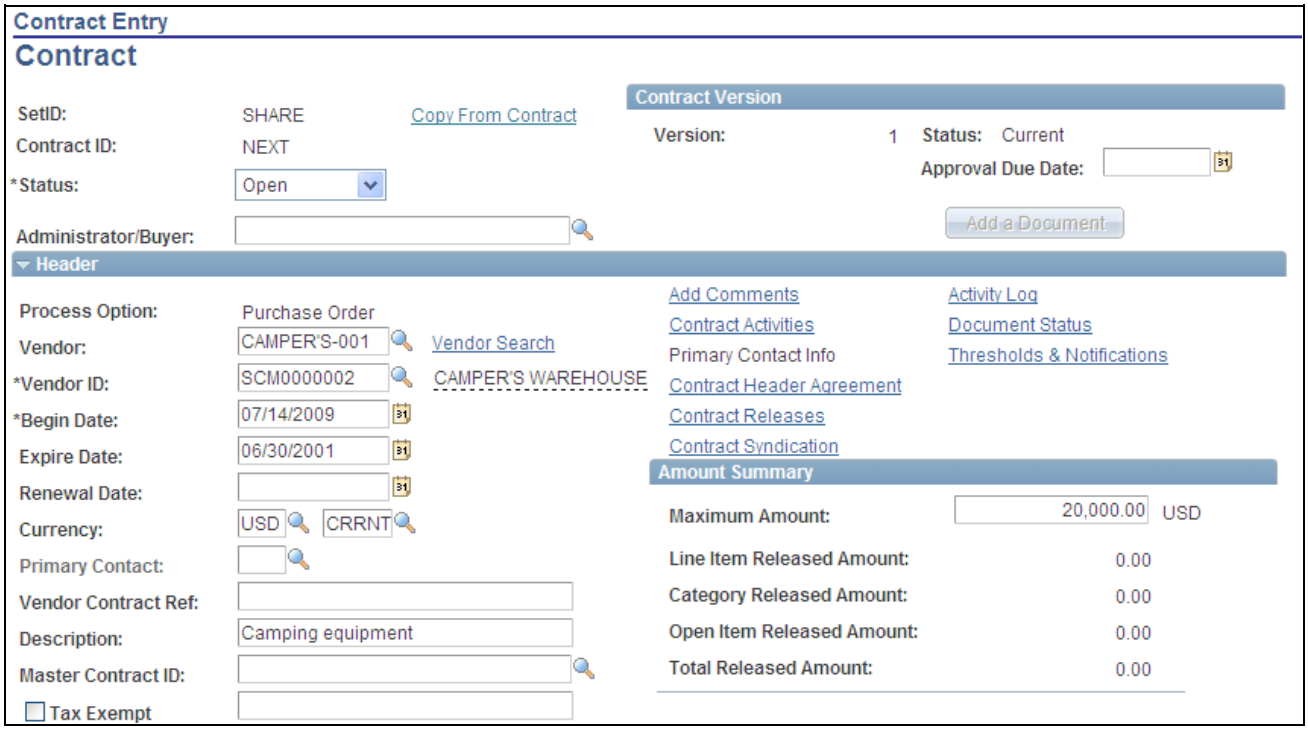
Entering Syndication Details

Access the Contract page (Supplier Contracts, Create Contracts and Documents, Contract Entry).



Contract page with Contract Syndication link

Use this page to enter contract data and review syndication details for contracts that have been syndicated. This section discusses the fields used in the syndication. A message appears next to the Status field that indicates if the contract has been syndicated.

TheContract Releases link does not appear if the contract process option type is not a Purchase Order type and the contract is syndicated. The system prevents releases from the parent system against contracts that use the other contract process options.

Note. If the Contract Syndication link doesn't appear, use the installation options to enable syndication. To access the options, select: Supplier Contracts, Supplier Contract Setup, Installation Options, Supplier Contract Management.

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.

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Status	Displays the contract's status. The default value for the field is *Open* when you create the contract. A contract must be in an Approved status before you can syndicate it.
Add a Document	Click to create a Purchasing contract document.
Contract Release	Click to access the Create Releases page. The page provides released line amounts and quantities along with remaining line quantities and enables you to define and stage contract releases. You can also view release history details about contract lines that have been syndicated.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Using Voucher and Order Contracts," Creating Contract Headers

Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Syndicating Supplier Contracts, page 172

Creating Releases Against Syndicated Contracts

Access the Create Release page (Supplier Contracts, Create Contracts and Documents, Contract Entry, and click the Contract Releases link on the Contract page).

Use this page to create releases against syndicated purchase orders and nonsyndicated contracts. The Create Release 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.

Click the Stage button 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.

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.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Using Voucher and Order Contracts," Entering Contract Release Information

Viewing Staged Releases for Syndicated Contracts

Access the Review Releases page (select the Review Releases tab on the Create Releases page).

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Use this page to view staged releases against a syndicated purchase order and a nonsyndicated contract.

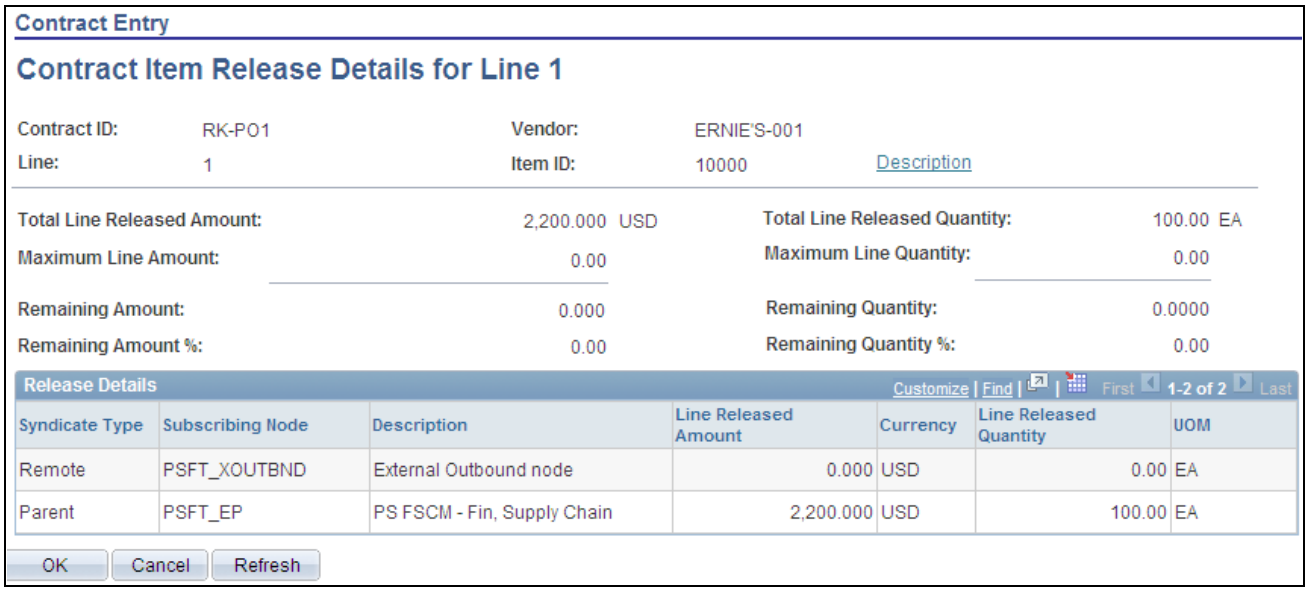
Use the PO Date (purchase order date) link to access item descriptions and add comments about the staged releases.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Using Voucher and Order Contracts," Reviewing Staged Releases

Viewing Syndicated Line Released Details

Access the Contract Line Release Details for Line page (select the Release Amounts or Release Quantities tab in the Contract Items Lines grid on the Contract page and click the Released Details link).



Contract Item Release Details for Line page

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.

Item ID Click to access a description of the item.

Total Line Released Amount Displays the total amount released to date for this contract line item. The amount value is expressed in the contract header currency.

Total Line Released Quantity Displays the total quantity released to date for this contract line item. The quantity value is expressed in the inventory unit of measure.

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Maximum Line Amount Displays the total amount that the released amounts of this contract line item should not exceed.

Maximum Line Quantity Displays the total quantity that the release quantity of this contract line item should not exceed.

Remaining Amount 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.

Remaining Quantity 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.

Remaining Amount % (remaining amount percentage) 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.

Remaining Quantity % (remaining amount percentage) 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.

Syndication Type Indicates if the amount that was released at the *Parent* or *Remote* node.

Subscribing Node Indicates the node from which the item release occurred. A description of the node also displays in the grid.

Line Released Amount Displays the total line item amount that was released for this node.

Line Released Quantity Displays the total line item quantity that was released for this node.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Using Voucher and Order Contracts," Reviewing Staged Releases

Viewing Syndicated Category Line Released Details

Access the Syndicated Released Details for Line page (select the Release Amounts tab in the Contract Categories Lines grid on the Contract page, and click the Released Details link).

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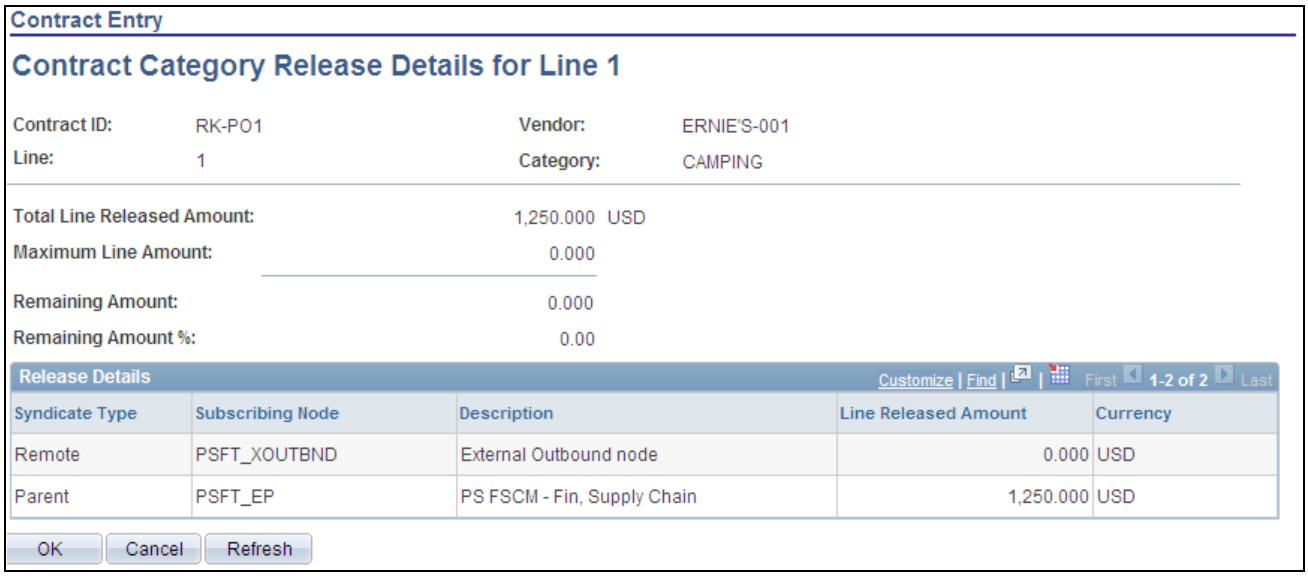

Contract Category Release Details for Line page

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 Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Viewing Syndicated Line Released Details, page 170.

Syndicating Supplier Contracts

This section discusses how to syndicate contracts.

Page Used to Syndicate Supplier Contracts

Page Name	*Definition Name*	*Navigation*	*Usage*
Contract Syndication	CS_CNTRCT_SNDCT	Supplier Contracts, Create Contracts and Documents, Contract Entry Click the Contract Syndication link on the Contract page.	Syndicate contracts.

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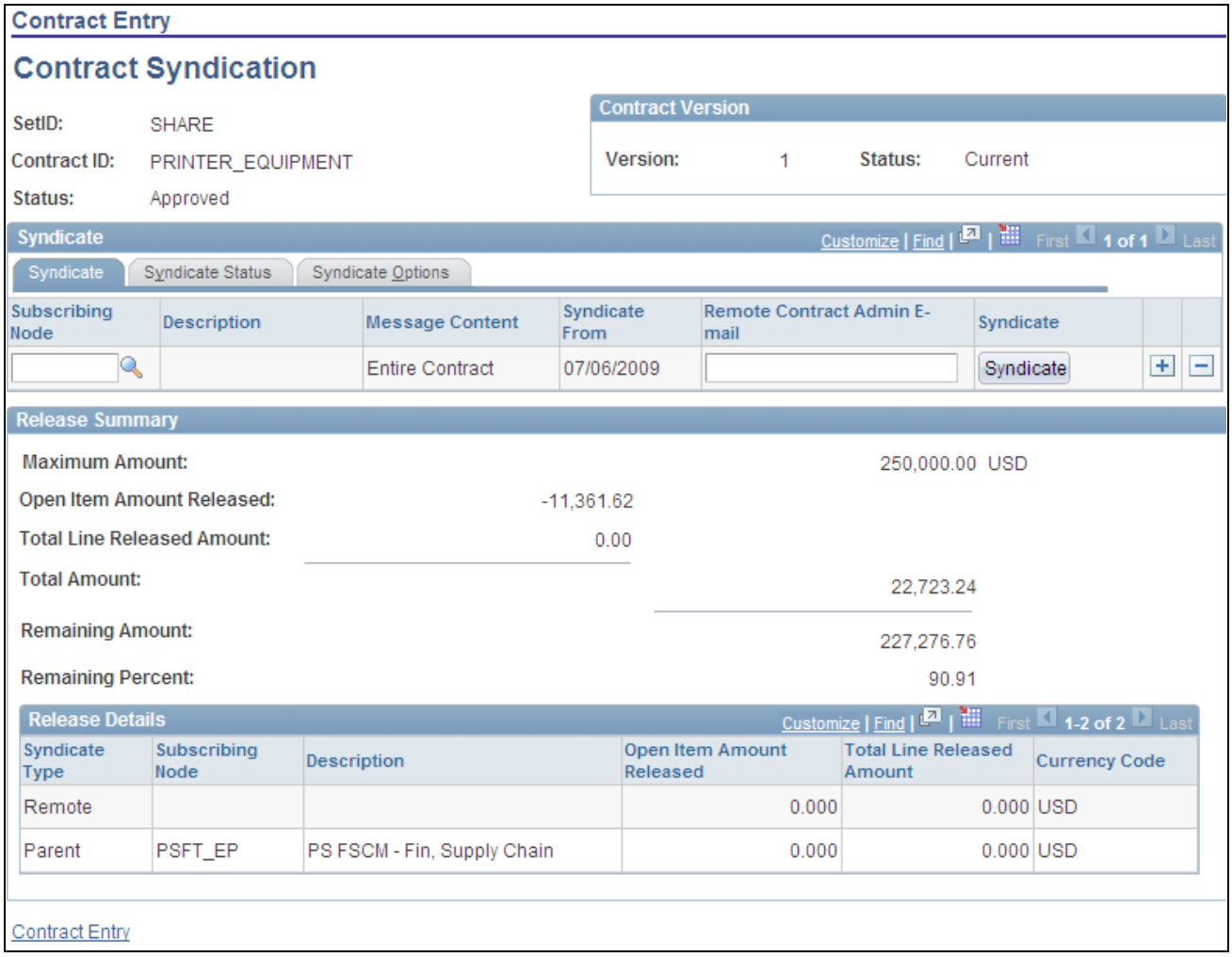
Syndicating Contracts

Access the Contract Syndication page (Supplier Contracts, Create Contracts and Documents, Contract Entry, and click the Contract Syndication link on the Contract page).



Contract Syndication page

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.

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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.

Contract ID Displays the contract identifier for which you are defining syndication information.

Status Displays the status of the contract that you are using. The contract must be in an Approved status before you can syndicate it.

Version Displays the version of the contract that you are working with. This value is available when version tracking is enabled.

Status Displays the status of the contract. You can syndicate only contracts that are the Current version of the contract.

Subscription Node 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.

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.

Description Displays the description of the node. This is defined when you create the node.

Message Content 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 *Entire Contract*, and the field is disabled. If the contract has been syndicated, the field is available for entry. Select *Changes Only* to indicate that when the system syndicates the contract again, only updates against the contract are processed for syndication. Select *Entire Contract* to indicate that the entire contract should be syndicated again. The system sets this field to *Changes Only* after each syndication.

Syndicate From 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.

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.

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Remote Contract Admin E-mail (remote contract administrator email) Identifies who is responsible for processing the contract on the remote node.

Syndicate 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:

- Approved:
  - You can create releases in multiple systems for Purchase Order process option contracts.
  - 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.
  - Verifies that contract does not have any staged releases.
- Closed, On-Hold, and Canceled:

  Verifies that the contract was previously syndicated.

When you click the Syndicate 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, vendor ID, and contract ID. When you access the Contract page again, the system provides an indicator that the contract has been syndicated.

See Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Publishing Outbound Messages, page 182.

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 Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Viewing Syndicated Line Released Details, page 170.

Maximum Amount 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.

Open Item Amount Released 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.

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Total Line Released Amount Displays the total amount released to date. The value is expressed in the contract header currency.

Total Amount Displays the total amount released for the contract.

Remaining Amount 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.

Remaining Percent 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 Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Syndicating Contracts, page 173.

Syndicate Status

Access the Syndicate Status tab.

This tab provides a high-level view of the syndication history for a contract.

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 Displays the last time the contract or changes to the contract were updated. The system updates the field each time the contract is published.

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.

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.

Original Syndication Displays the first date on which the contract was published.

Syndicate Options

Access the Syndicate Options tab.

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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.

Contract Defaults 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 PO Defaults link on the Contract Entry page.

Miscellaneous Charges 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:

- The miscellaneous charge code is defined only once.
- An amount must be specified if a miscellaneous charge code exists.

Milestones 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.

Supplier Contract Management verifies the release of milestone lines for merchandise amount changes during syndication. Milestones can be quantified by amount or percentage.

The system considers these milestone conditions and issues error messages if they are not met:

- If the milestone is by amount, the amount cannot be negative if the merchandise amount is not negative.
- Only lines with a negative merchandise amount can contain negative milestone amounts.
- The milestone amount on the milestone line cannot exceed the merchandise amount on the contract line.
- The sum of the milestone line amounts must equal the merchandise amount on the contract line.
- The percentage complete cannot exceed 100 percent.
- Total milestone percentages for the contract line cannot exceed 100 percent.

Shipping Schedules 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.

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.

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Distributions 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:

- Distribution must percentages equal 100 percent for the business unit.
- The sum of the distribution amount must equal the merchandise amount for the business unit.
- 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.
- The item is defined in the inventory business unit on the distribution line.
- The distribution merchandise amount cannot exceed the contract line amount.

Capturing Parent Activities

To capture activities, use the Capture Parent Activity component (CS_CT_PAR_ACT_CAP).

This section provides an overview of activities and discusses how to capture 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 flowchart illustrates how activity data flows from remote systems to the parent system:

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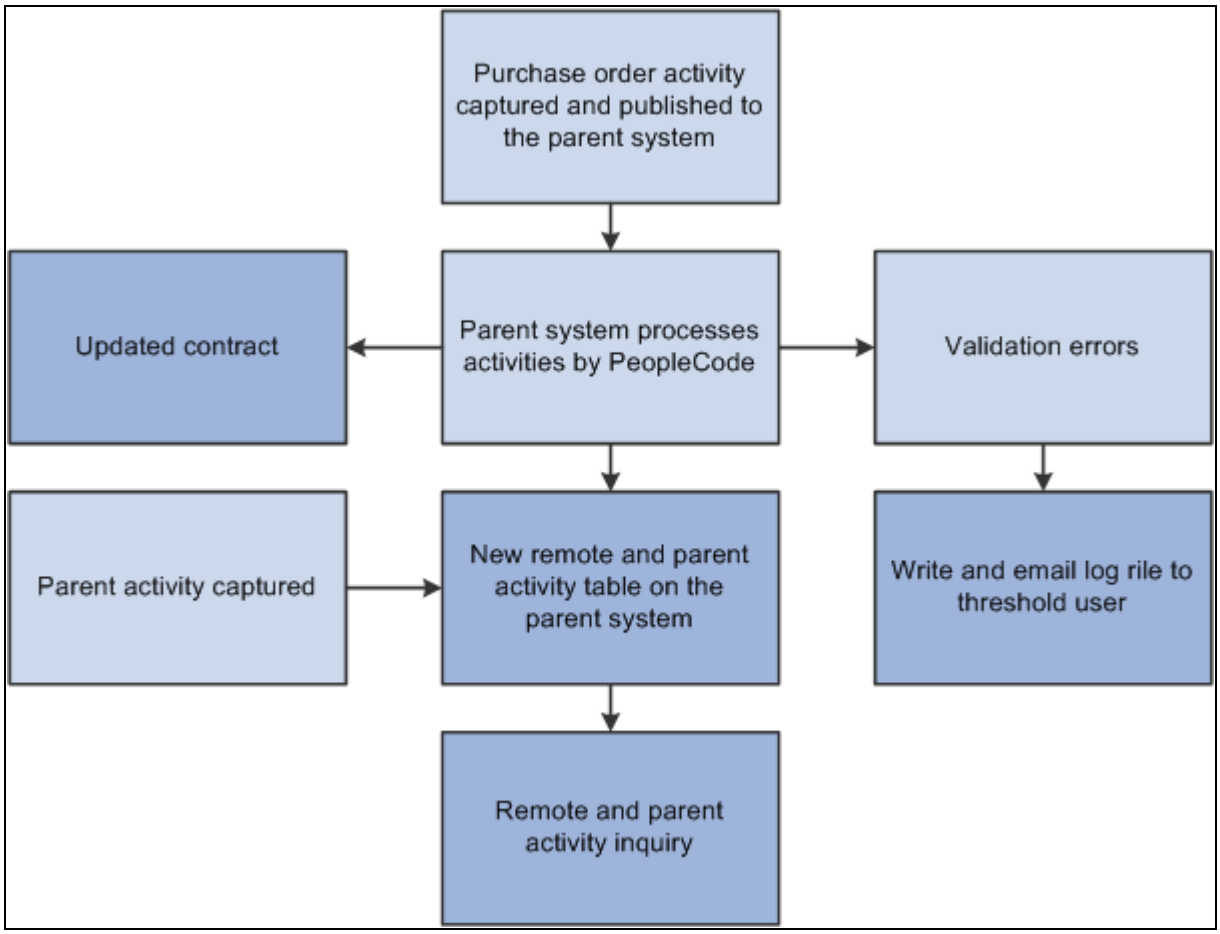

Syndication activity flow

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.

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- 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.

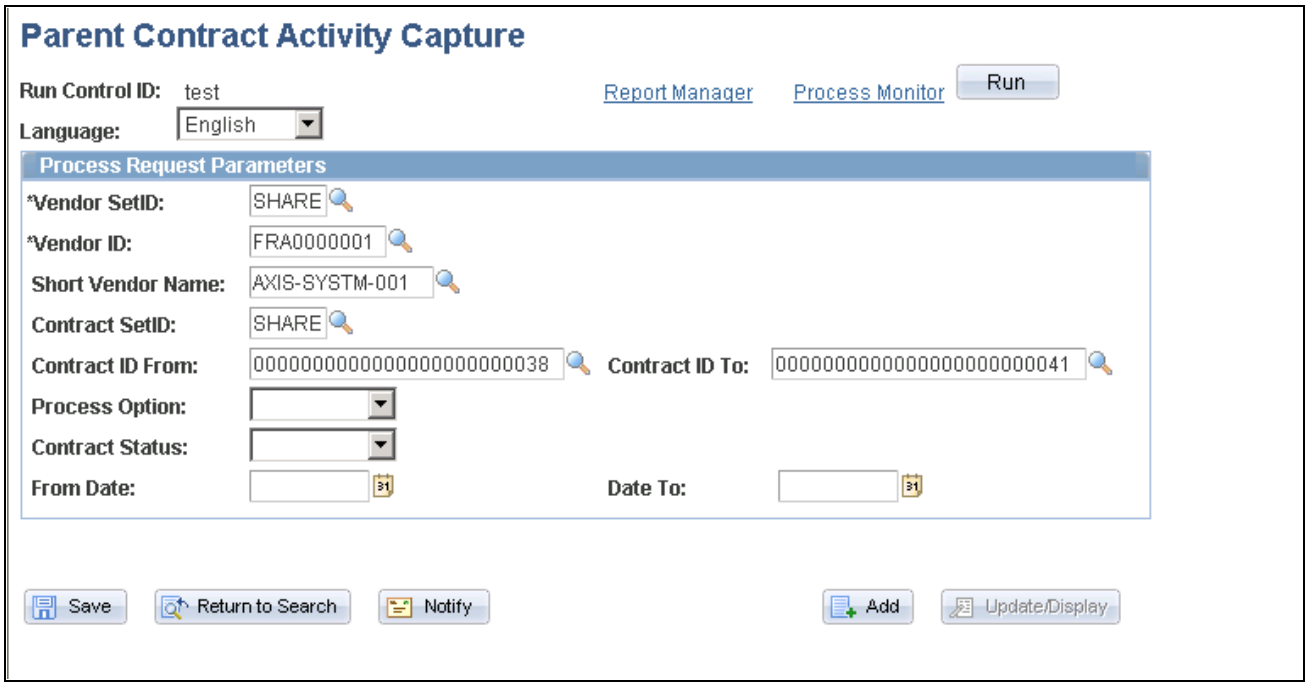
  You use the Review Inbound Exceptions component to review error details.

Page Used to Capture Parent Activities

Page Name	*Definition Name*	*Navigation*	*Usage*
Parent Contract Activity Capture	CS_CT_PAR_ACT_CAP	Supplier Contracts, Syndication and Messaging, Capture Parent Activity	Capture parent activities.

Capturing Parent Activities

Access the Parent Contract Activity Capture page (Supplier Contracts, Syndication and Messaging, Capture Parent Activity).



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.

Vendor SetID Select a setID from which you want to use a vendor. The field value determines the values available for the vendor ID. This is a required field.

Vendor ID Select the vendor for this contract. This is a required field.

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Short Vendor Name Displays the vendor name. The system populates this field when you select the vendor ID.

Contract SetID 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.

Contract ID Fromand **Contract ID To** Enter a range of contract IDs for which you want to capture activities.

Process Option 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.

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.

Field values are:

- *General:* Indicates that the contract is for general use.
- *Order:* 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.
- *PO Vchr* (purchase order voucher).
- *PPay Vchr* (prepaid voucher): Indicates that the contract is a prepaid voucher contract without an advance purchase order.
- *PPay w/Adv* (prepaid voucher with advance purchase order).
- *Single PO* (single purchase order): Indicates that the contract is a release to single purchase order only contract.
- *Voucher:* This process option establishes and schedules amounts for recurring payments such as rent, lease, and utility payments.

Contract Status Select a contract status for which you want to capture activities. Values are:

Approved

Canceled

Closed

On-Hold

Open

From Dateand**To Date** 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.

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Publishing Outbound Messages

To publish outbound messages, use the Publish Outbound Message component (IN_PUB_MSG).

This section provides an overview of outbound messages and discusses how to:

- Publish messages.
- 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:

Outbound to Remote System	*Record Name*
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

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Outbound to Remote System	*Record Name*
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.

Pages Used to Publish Outbound Messages

Page Name	*Definition Name*	*Navigation*	*Usage*
Publish Outbound Message	IN_RUN_PUB_MSG	Supplier Contracts, Syndication and Messaging, Publish Outbound Message	Publish messages by initiating the outbound message publish process for outbound PeopleSoft messages that use the batch publish design pattern.
Supplier Contract Syndication Message Selection Criteria	CS_RUN_CNT_SN	Supplier Contracts, Syndication and Messaging, Publish Outbound Message Select the Supplier Contract Management check box on the Publish Outbound Message page, then click the Supplier Contract Management link.	Define criteria for publishing outbound messages.

Publishing Messages

Access the Publish Outbound Message page (Supplier Contracts, Syndication and Messaging, Publish Outbound Message).

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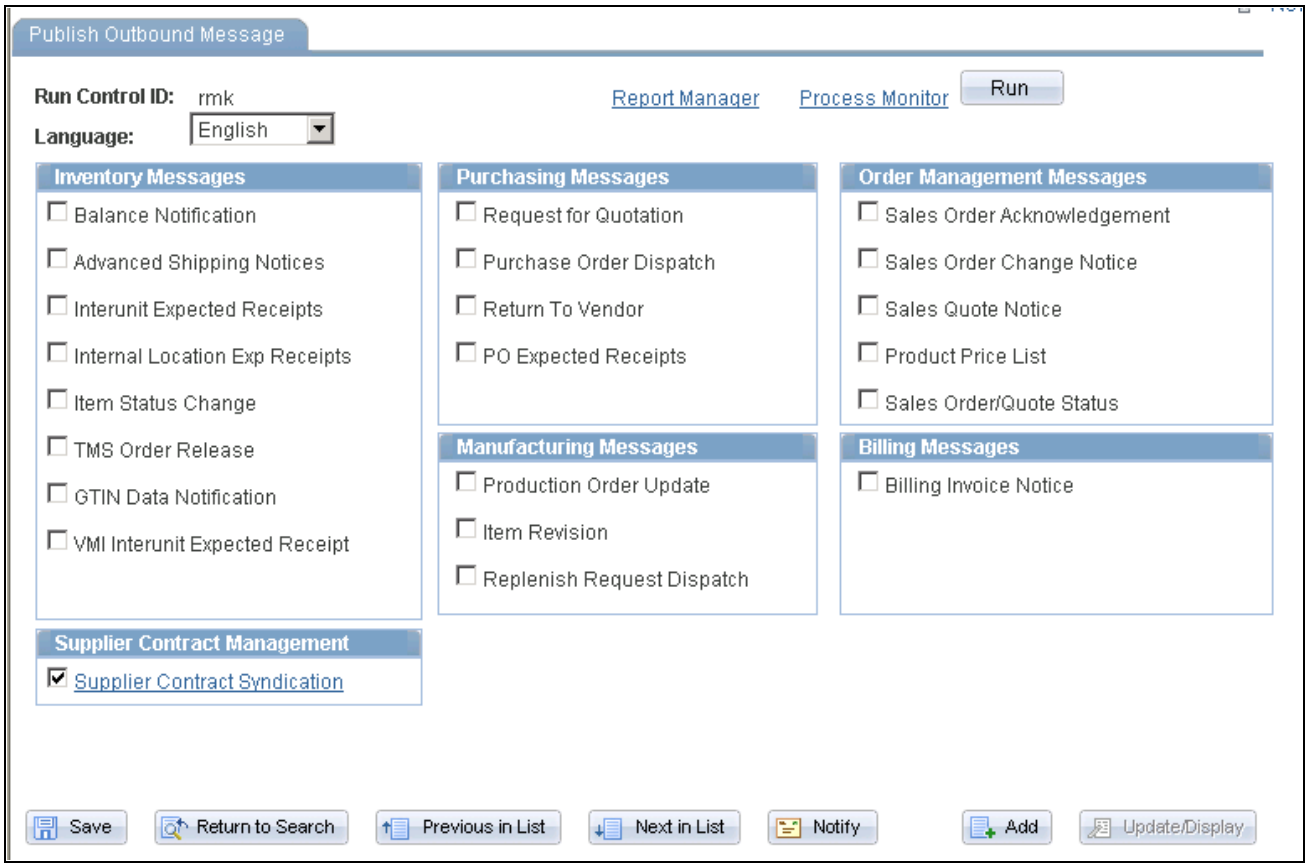

Publish Outbound Message page

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.

Supplier Contract Syndication 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.

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Remote Contract Activity 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.

Note. 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 PORTAL_REMOTE field, and change the default value from constant *N* to *Y*.

Defining Criteria for Publishing Outbound Messages

Access the Supplier Contract Syndication Message Selection Criteria page (select the Supplier Contract Management check box on the Publish Outbound Message page, then click the Supplier Contract Management 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.

Request ID Enter a value by which you want to track this publish request.

Description Enter a unique description for this request.

All Contracts Select whether you want to publish messages for a single contract or for all contracts. If you select *All Contracts,* the system includes messages for all contracts that meet the search criteria. If you select *Specific Contract,* the system highlights the SetID and Contract ID fields for entry. The system also provides a Lookup button for searching contracts.

All Vendors Select whether you want to publish messages for a single vendor or for all vendors. If you select *All Vendors,* the system includes messages for all vendors that meet the search criteria. If you select *Specific Vendor,* the system highlights the Vendor SetID and Vendor ID fields for entry. The system also provides a Lookup button for searching vendors.

Publish Changes Only 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.

Chunk Size Enter the number of contract lines you want to process at a time.

Reviewing Contract Activities

This section discusses how to:

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- Define activity inquiries.
- Review activity details.

Pages Used to Review Contract Activities

Page Name	*Definition Name*	*Navigation*	*Usage*
Activity Summary Inquiry	CS_CT_PAR_ACT_INQ	Supplier Contracts, Syndication and Messaging, Review Contract Activity	Define activity inquiries.
Activity Summary Detail	CS_CT_PACT_INQ_DET	Supplier Contracts, Syndication and Messaging, Review Contract Activity Click the Search button on the Activity Summary Inquiry page.	Review activity details.

Defining Activity Inquiries

Access the Activity Summary Inquiry page (Supplier Contracts, Syndication and Messaging, Review Contract Activity).

Use this page to define search criteria for contract activities. Search criteria is based on vendor 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.

Contract SetID Displays the setID to which the contract belongs.

Contract ID Displays the contracts that met the search criteria. If you left the Contract ID 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.

Contract Status Displays the status for the corresponding contract.

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Maximum Amount 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.

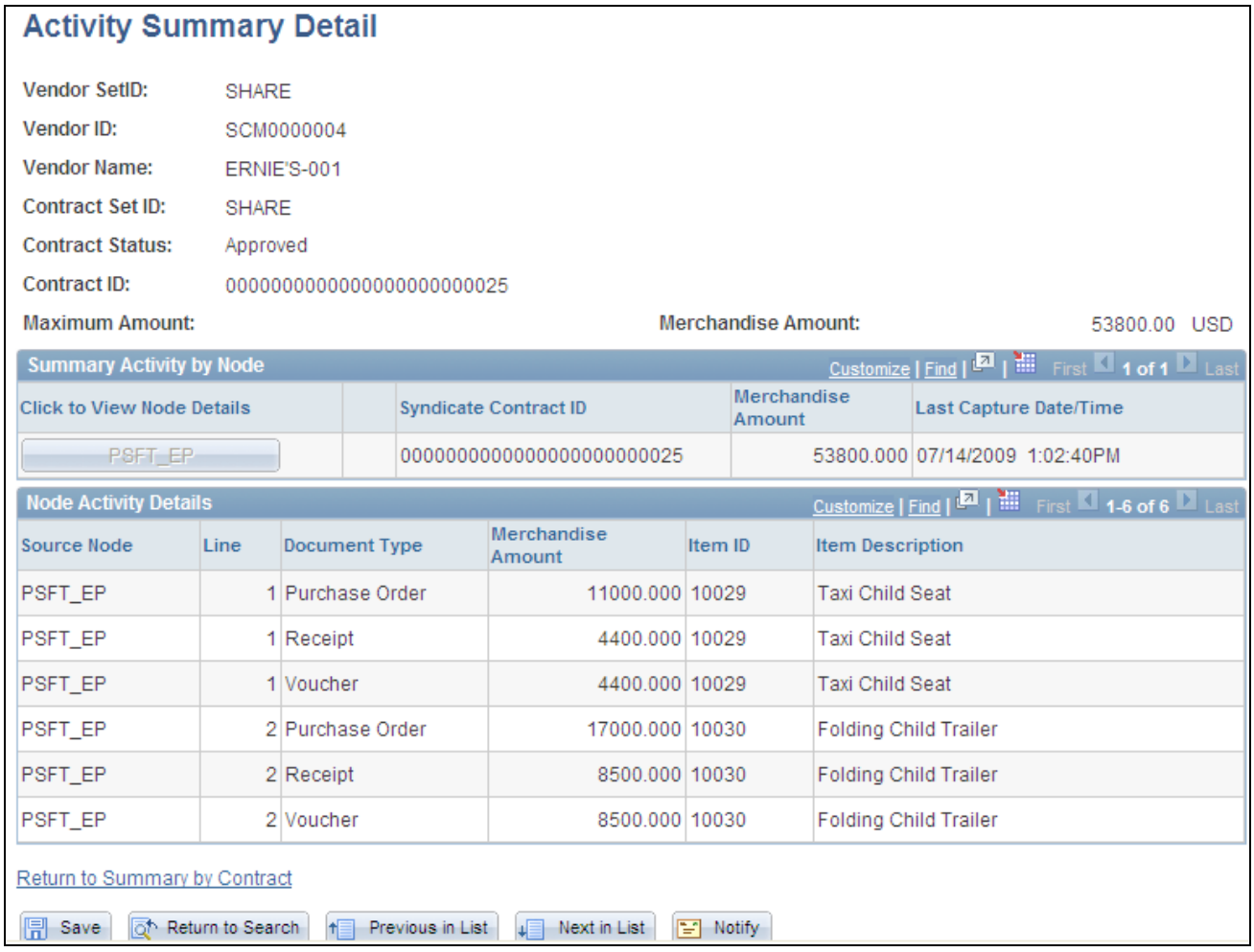
Merchandise Amount Displays the total contract amount for both parent and remote systems.

Currency Code Displays the currency that applies to the contract.

Last Capture Date/Time Displays the last time that activities were captured for the corresponding contract.

Reviewing Activity Details

Access the Activity Summary Detail page (Supplier Contracts, Syndication and Messaging, Review Contract Activity).



Activity Summary Detail

Activity Summary Detail

Vendor SetID: SHARE
Vendor ID: SCM0000004
Vendor Name: ERNIE'S-001
Contract Set ID: SHARE
Contract Status: Approved
Contract ID: 00000000000000000000000025
Maximum Amount: Merchandise Amount: 53800.00 USD

Summary Activity by Node — Customize | Find | First 1 of 1 Last

Click to View Node Details		Syndicate Contract ID	Merchandise Amount	Last Capture Date/Time
PSFT_EP		00000000000000000000000025	53800.000	07/14/2009 1:02:40PM

Node Activity Details — Customize | Find | First 1-6 of 6 Last

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

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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

Click to View Node Details 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 Node Activity Details 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.

Syndicate Contract ID 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.

Merchandise Amount Displays the total value of the contract that has been released by this remote system.

Last Capture Date/Time 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.

Source Node Displays the node in which activity against the contract has occurred.

Line Displays the contract line against which the activity occurred.

Document Type Indicates the document that is summarized for each contract line. Document types include: *Purchase Order, Receipt,Return to Vendor,* and *Voucher.*

Merchandise Amount 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 vendor, 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.

Item ID Displays the item for which the activity has occurred. A description also displays for the item.

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Inbound Contract Messaging and Exceptions

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. This section discusses how to:

- Review inbound contract exceptions.
- Review contract exception error details.

Pages Use to Review Inbound Contract Exceptions

Page Name	*Definition Name*	*Navigation*	*Usage*
Review Inbound Contract Exceptions	CS_CNTRCT_MAINT	Supplier Contracts, Syndication and Messaging, Review Inbound Exceptions	Review inbound contract exceptions.
Syndicated Contract Error Details	CS_CNTRCT_MAINT_2	Supplier Contracts, Syndication and Messaging, Review Inbound Exceptions Click the Error Details link on the Review Inbound Contract Exceptions page.	Review contract exception error details.

Reviewing Inbound Contract Exceptions

Access the Review Inbound Contract Exceptions page (Supplier Contracts, Syndication and Messaging, Review Inbound Exceptions).

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Review Inbound Contract Messages page

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.

Sequence Displays a unique system-assigned local key to the staged contract data.

Action Select an action to be performed on this line. Values are: *None*,*Reprocess*, and *Delete*. Select Error Details to review the errors.

If you can correct the errors, make the correction and then select the *Reprocess* option in the Action field to reprocess the contract. Otherwise, you can select the *Delete* option to delete contract and republish the contract from the source system.

Contract ID Displays the contract ID for the parent system.

Local Contract ID Displays the contract ID on the current system. If this is a new contract, *NEXT* appears in the field. If it is an existing contract, the Contract ID for the local system appears.

Error Details Click to access the Syndicated Contract Error Details page where you can review errors related to this contract exception.

Details

Select the Details tab.

Message Chunks Displays the total number of chunks in the message.

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Chunks Received	Indicates the total number of message chunks staged. Messages cannot be processed until all chunks are staged. This provides you visibility to incomplete messages.
Vendor ID	Displays the vendor ID from the contract header.
Vendor Name	Displays the name of the vendor.
Buyer	Displays the buyer ID from the contract header.

Reviewing Contract Exception Error Details

Access the Syndicated Contract Error Details page (click the Error Details link on the Review Inbound Contract Exceptions page).

Use the page to review syndication errors for inbound contracts.

Loading Contracts into the Parent System

You 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.

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.

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. If validation fails, see the Inbound Contract Messaging and Exceptions section for more information about processing inbound exceptions.

See Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Inbound Contract Messaging and Exceptions, page 189.

Note. The Contract Load process only creates new contracts. It does not update existing contracts.

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See Also

Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Inbound Contract Messaging and Exceptions, page 189

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Part 3

Supplier Contract Document Authoring System

Chapter 8
Setting Up PeopleSoft Supplier Contract Management

Chapter 9
Managing the Contract Library

Chapter 10
Using the Contract Document Wizard

Chapter 11
Importing Clauses, Sections, and Documents

Chapter 12
Generating Microsoft Word Documents

Chapter 13
Managing Document Life Cycles

Chapter 14
Searching for Library and Document Contents

Chapter 15
Creating Reports for Library and Document Contents

Chapter 16
Configuring PeopleSoft Approval Framework for Use with Supplier Contract Management

Chapter 17
Approving Documents and Document Components

Chapter 18
Creating and Maintaining Amendments for Supplier Contracts

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Chapter 8

Setting Up PeopleSoft Supplier Contract Management

This chapter provides an overview of PeopleSoft Supplier Contract Management setup and discusses how to:

- Set up supplier contract attachment database servers or FTP servers and directories.
- (Optional) Set up PeopleSoft Integration Broker for Microsoft Word and Adobe integration.
- (Optional) Set up digital signatures.
- Define installation options for PeopleSoft Supplier Contract Management.
- Define clause libraries and groups.
- Set up approval types.
- Establish clause classes.
- Map bind variables.
- Set up bind prompt tables.
- Set up document configurator groups and types.
- Define document templates and styles.
- Define default settings for document formats and options.
- (Optional) Set up user-defined fields.
- Define automatic numbering specifications.
- Set up user preferences.

Note. PeopleSoft Supplier Contract Management uses Microsoft Word 2003 Professional version and Microsoft Office Word 2003 Markup Language (Microsoft WordML) 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 Verity searching. This chapter does not provide setup requirements for these features. See the corresponding chapters for setup information about these features.

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Understanding PeopleSoft Supplier Contract Management Setup

This chapter discusses the general setup information that the system uses to control the document authoring system. Using supplier contract authoring for transactional purchasing contracts, purchase orders, and ad hoc document generation requires basic setup to enable authoring. For example, basic document authoring includes:

- The setup of a database server or file-transfer program (FTP) server directories for file storage.

  Either a database server or an attachment FTP 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 might consider storing attachments within the database server preferable to storage to an FTP server because data management is more contained in the database server. However, before choosing a database server or FTP server, you should also consider the following:

  - Are you currently using FTP 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 FTP servers versus database servers for Verity Search Collections.

    Because Verity search collections require the collection be built from a saved file outside of the database, rebuilding collections using FTP servers and a mapped server drive will likely perform better than extracting attachments from the database and storing them to temporary files for builds.

- The installation of Microsoft Office Word 2003 Professional Edition, SP2 or later release on workstations for users interacting with the system.

  This is a minimum requirement.

- A basic library setup.

  You use several core setup features to provide the basis for managing the contract library and to establish basic elements of documents. Clause groups and libraries and configurator types and groups help you to organize the library while approval types and clause classes assist in the 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.

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- Optional configurations.

  These include:

  - Setting up Microsoft Word components on workstations.

    This feature enables selected users to interact directly with the PeopleSoft database from within Microsoft Word to retrieve 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 .xml authored document into a Microsoft Word .doc or Adobe .pdf format. You should configure for 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 2003.

  - Enabling automatic numbering.

    The system uses automatic numbering to automatically assign numbers to ad hoc documents, clauses, and sections.

- 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 Verity searches, enable transaction sources, enable cycle times, setup internal and external collaboration, and setup digital signatures.

- User preferences.

  You use these features to define authorizations for document administrators and librarians, and to delegate document authorizations to other users.

The Supplier Contract Management Helpful Hints appendix provides additional information about setup issues.

See Appendix B, "Supplier Contract Management Helpful Hints," page 735.

See Also

Chapter 4, "Defining Contract Agreements," Understanding Contract Agreements, page 71

Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," Setting Up Contract Syndication, page 162

Setting Up Supplier Contract Attachment Database and FTP Servers and Directories

To set up attachment database or FTP servers and directories, use the Administer File Attachment component (SAC_ATT_ADMIN).

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This section discusses how to add FTP servers. Setting up database servers is similar except that you only add a database server, and do not setup the component directories that are specified for FTP server setup.

Page Used to Set Up Supplier Contract Attachment Database and FTP Servers and Directories

Page Name	*Definition Name*	*Navigation*	*Usage*
Administer File Attachments	SAC_ATT_ADMIN	Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments	Add FTP servers for supplier contract attachments if you do not already have an FTP server defined for other Supplier Relationship Management (SRM) products such as PeopleSoft eProcurement. Click the Add FTP Server button on the Administer File Attachments page to add server information.

Adding FTP Servers

Access the Administer File Attachments page.

Prior to 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 *FTP*, its appropriate directories. The system stores and retrieves attachments for PeopleSoft Supplier Contract Management from the server locations that are defined on this page.

System administrators can configure one or more servers to store attachments. Using this page, system administrators set up new servers and identify the active server. They can add or modify the FTP root folder and the component-specific subfolder for FTP 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.

File Attachment Servers

Use this grid to add file transfer protocol servers. Click the Add FTP Server button to add a server.

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Pick Active Server Select the server ID that you want to make active for the entire installation.

ID (server ID) Displays the system-assigned ID number for each server on this page. When an attachment is stored on the server, the server ID is inserted into the attachment record. When you request to download (view) this attachment, the system retrieves it from the original server based on the server ID.

Type Identifies the type of server based on whether you click the Add FTP Server button or the Add Database Server button. After you save the row and quit the component, you cannot change the server type. Values include *FTP* (file transfer protocol server) and *DB* (database server).

Login Enter or change the login name. This is required for FTP servers.

Password Enter or change the password corresponding to the login name. The password is required for FTP servers.

Server/Record Name Enter a value for both FTP servers and database servers. For FTP servers, enter the machine name. After you save the information, the machine name should be changed only if the same FTP server is renamed. To add a different FTP server, click the Add FTP Server button to insert a new row into the grid and define the new server. You cannot delete servers, because attachments could already be stored on them. For database servers, enter record name PV_ATT_DB_SRV.

Path Enter the subdirectory path under the server's FTP root where all attachments are to be stored. This is a required field for FTP servers.

Add FTP Server(add file transfer protocol server) Click to insert a new row in the grid to define a new FTP server for attachments.

Add Database Server Click to insert a new row in the grid to define a new database server for attachments.

Component Subdirectories

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

Note. Component subdirectories are only applicable to FTP server types, not database servers.

The next table provides examples of how you can set up subdirectories. You can select any path name you want for a subdirectory. You set up subdirectories for these components:

Component	*Path Example*	*Description*
CS_CLAUSE_DEFN	Clause	Stores clause information for Microsoft Word 2003 editing.
CS_CNT_AG_RESULT	AgreeResult	Stores contract agreement results that are attachments.

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Component	*Path Example*	*Description*
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 2003 editing.
CS_TMPL_TBL	Configurator	Stores ad hoc document configurator clauses for Microsoft Word 2003 editing. See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Document Templates and Styles, page 252.
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 FTP 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 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 FTP Attachment Server feature during the initial setup of the product.

Warning! Overriding an attachment server should be an exception and only performed when absolutely necessary. Overriding the server also affects the use of Verity 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.

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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 prefer the Supplier Contract Management server to be FTP-based versus a database server. So after defining the database attachment server during system installation, you can use the Override Attachment Server ID field on the Supplier Contract Management Installation Options page to define the FTP 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 Verity. 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 Verity Search page because Supplier Contract Management searches and indexes FTP server files only.

Note. The Override Attachment Server ID field is used for all supplier contract authoring-related attachments with the exception of header and line attachments existing within the Contract Entry or Purchase Order components. If the Contract Entry or Purchase Order header and line attachments are stored in a database server, you cannot include them in Verity searches.

If you plan to use two FTP attachment servers and neither one is a database type server, you can use one for the installation-wide setting and use a unique one for PeopleSoft Supplier Contract Management. You can use these steps to override the installed server:

1. Select Setup Fin/SCM, Common, File Attachments to create additional server IDs on the Attachment Server page.

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

   ---

2. Set the active server to the one that you want for all other applications.
3. Remember the server ID for the server that you want to use for PeopleSoft Supplier Contract Management.
4. Access the PeopleSoft Supplier Contract Management Installation Options page.
5. 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.
6. Click Save.

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

See Also

Appendix B, "Supplier Contract Management Helpful Hints," Supplier Contract Management Setup Needs, page 736

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(Optional) Setting Up PeopleSoft Integration Broker for Microsoft Word and Adobe Integration

This section provides an overview of system setup for Microsoft Word configuration files and PeopleSoft Integration Broker and discusses how to:

- Install and configure Microsoft Word components on workstations for task pane integration.
- Set up PeopleSoft Integration Broker for use with Microsoft Word and Adobe Acrobat for rendering .doc, PDF, and digital signature files on the server.

Understanding System Setup for Microsoft Word Configuration Files and PeopleSoft Integration Broker

Microsoft Office Word integration is a core requirement of PeopleSoft Supplier Contract Management. You can use Microsoft Word 2003 Professional or Microsoft Word 2007 (editing 2003 XML compatible format) directly to check out and edit clauses, sections, ad hoc configurator clauses, and contract documents. 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 section 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 don't 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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Installing and Configuring Microsoft Word and Acrobat Components on Workstations, page 212.

The following sections describe special Microsoft Word setup conditions for use with PeopleSoft Supplier Contract Management. They include:

- Microsoft Word installation.
- URL configuration for use with clause searches.
- Clause import XML schema setup.

Microsoft Word Setup on Workstations

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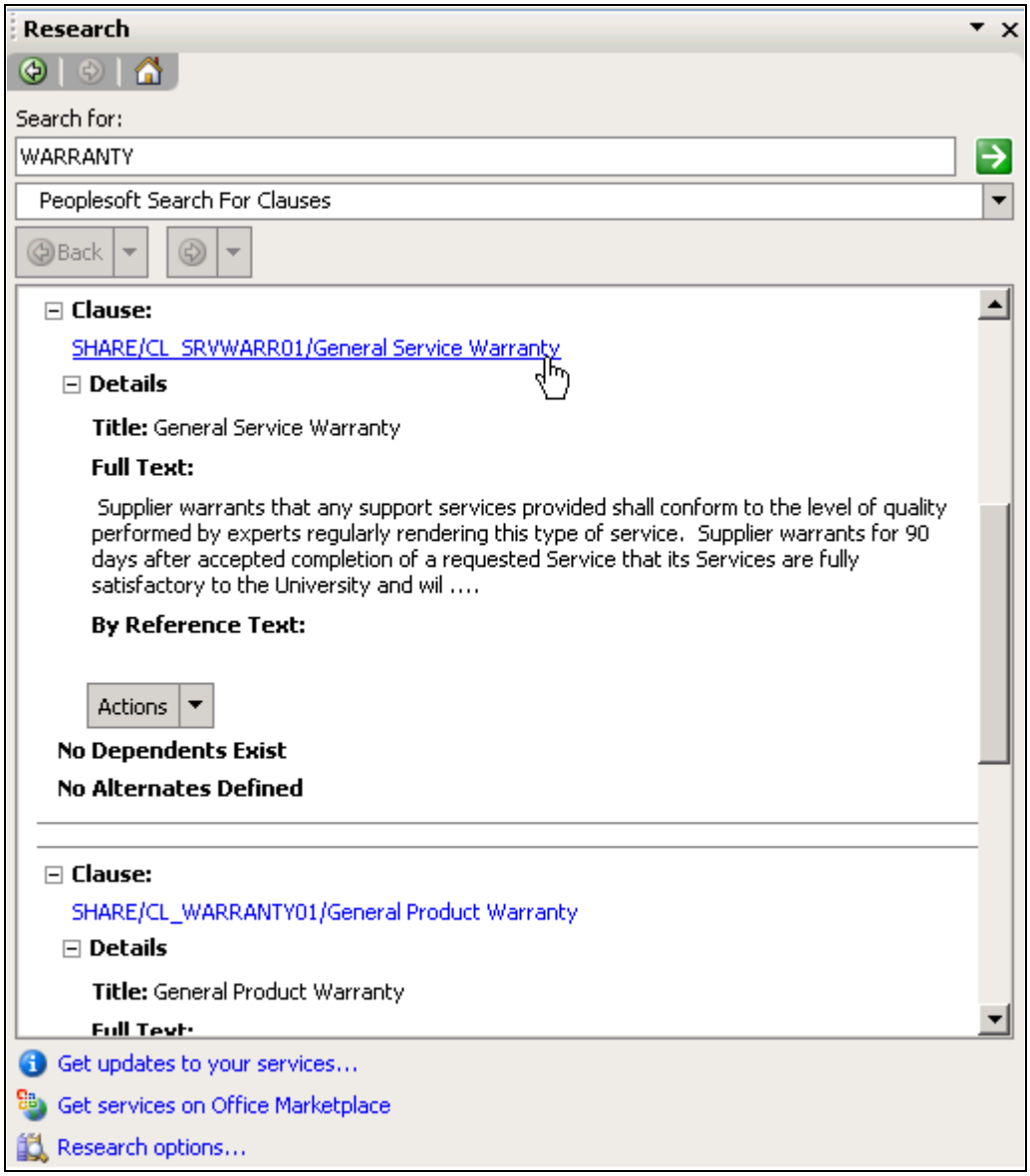
After you install components on the workstation, you can use the Microsoft Word Research task pane to search for and to add binds and clauses to contract documents. In the clause search results, the system provides a URL so that you can navigate to the clause in the contract library of the PeopleSoft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

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



Example of a Microsoft Office Word 2003 Professional 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 run install again for the new settings to take effect.

Integration Broker Setup to Enable Workstation's Word Research Task Pane Searches

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,"*Enterprise PeopleTools PeopleBook: Integration Broker*.

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's 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.

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

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

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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,"*Enterprise PeopleTools PeopleBook: Integration Broker.*

   g. Ensure 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, "Appendix: Integration Scenarios," *Enterprise PeopleTools PeopleBook: Integration Broker.*

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3. Set the CS_DOC_CHL queue status to *Run.*

   A queue isolates different groups of service operations from each other. The CS_DOC_CHL queue queues the CS_SEARCH_BINDS and CS_SEARCH_CLAUSES for processing.

   See Managing Service Operation Queues*Enterprise PeopleTools PeopleBook: Integration Broker.*

   To set the queue status:

   a. Select PeopleTools, Integration Broker, Integration Setup, Queues.

   b. Ensure that *Run* is selected in the Queue Status field.

   c. Click the Save button.

See "Managing Service Operations,"*Enterprise PeopleTools PeopleBook: Integration Broker.*

See Setting Up Service Operations, "Implementing Integrations," *Enterprise PeopleTools PeopleBook: Integration Broker.*

URL Configuration for Use with Clause Searches

Linking to clauses requires an extra task. To link to clauses from within a Microsoft Word Research task pane, you also need to establish a URL that will appear as the clause name in Microsoft Word. You must define a server and location for the EMP_SERVLET URL. To access the URL, select PeopleTools, Utilities, Administration, URLs. Search for the EMP_SERVLET URL identifier. Enter a partial PeopleSoft Internet Architecture URL in the URL field. An example of the formatting appears on the page. An entry might be, for example, *http://pfas027.peoplesoft.com:8001/psp/e900r20bnt/EMPLOYEE/.* See the previous example to view how the URL appears in a Microsoft Word page.

Clause Import XML Schema Setup

Each clause needs to have specific XML tags to meet system clause-structure import requirements. This is achieved by applying custom import tags to content within the Microsoft Word document that contains the clauses you want to import. Then, you save the file in a Microsoft Word 2003 .xml file format. An XML schema enables you to mark and import clauses from a Microsoft Word file. This schema enables you to tag clause information in the document prior to importing the document. The system parses the incoming file and creates a list of clauses and optionally configurators to create.

Note. You need to deliver the schema to client desktops for clause librarians before the librarian user can use import features. This can include setting up a location to which you want to download the schema depending on who and how you want to distribute the schema.

The Understanding the Clause Upload Process section describes the steps for enabling the schema.

See Chapter 11, "Importing Clauses, Sections, and Documents," Understanding the Object Import and Creation Process, page 399.

See Also

Appendix A, "Microsoft Word Integration with Supplier Contract Management," Understanding Microsoft Word Integration with Supplier Contract Management, page 701

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Pages Used to Set Up PeopleSoft Integration Broker and Microsoft Word Configuration Files

Page Name	*Definition Name*	*Navigation*	*Usage*
Gateways	IB_GATEWAY	PeopleTools, Integration Broker, Configuration, Gateways	Configure gateways.
Service Operations - General	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Service Operations, General	Define and activate a service operation.
Service Operations - Handlers	IB_SERVICEHDLR	PeopleTools, Integration Broker, Integration Setup, Service Operations, Handlers	Activate one or more service operation handlers.
Service Operations - Routings	IB_ROUTINGDEFN	PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings	Define and activate routing definitions on the service operation.
Queue Definitions	IB_QUEUEDEFN	• PeopleTools, Integration Broker, Integration Setup, Service Operations, General. Select the Queue link attached to this service operation. • PeopleTools, Integration Broker, Integration Setup, Queues	Set the queue used by the service operation to *Run.*
Node Definitions	IB_NODE	PeopleTools, Integration Broker, Integration Setup, Nodes, Node Definitions	Activate node used by the service operation.
Nodes - Connectors	IB_NODECONN	PeopleTools, Integration Broker, Integration Setup, Nodes, Connectors	For an outbound service operation, verify that the node is connected to the correct network.

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Setting Up PeopleSoft Integration Broker Window Servers for Use with Microsoft Word and Adobe Acrobat

This section discusses the Integration Broker setup needed for initiating optional server-side comparisons of Microsoft Word files, rendering of .doc or PDF files, as well as rendering PDF or .docx files for preparing the read-only version of documents for capturing digital signatures.

You have to prepare the system to render contract documents in PDF, .doc, and/or .docx file formats by setting up a Microsoft Windows-based server machine, such as Windows 2000 or Windows XP, to render contract documents. For this functionality the dedicated shared Microsoft Windows-based server also needs to have an application server installed that is used for internal messaging between the application servers the Supplier Contract Management users use and the Microsoft Windows application server for special server-side processing. To setup the Microsoft Windows server machine, ensure that:

- PeopleTools is installed.
- An application server domain has been created for your system.
- A copy of CSDOCUTL.DLL is in the %PSHOME%/BIN/SERVER/WINX86 directory before the application server is booted up.

  This DLL enables server-side processing of Microsoft Word files and is used when comparing documents, dispatching documents in .doc file type, and preparing documents for digital signatures using Adobe Acrobat (.pdf) or Microsoft Word 2007 (.docx). The CSDOCUTIL program interacts with Microsoft Word and Adobe Acrobat on the windows server machine using an internal synchronization message call when you render a .doc or PDF file for dispatch or when you prepare a PDF or .docx file for digital signature.
- Adobe Acrobat 8 Professional (or later versions) is installed if you plan to use Adobe Acrobat digital signatures, or dispatching documents in PDF.

  Note. When using Adobe PDF format for digital signature purposes, contract administrators who are designated for preparing and enabling signature rights must also have a copy of Acrobat 8 installed on their client workstation.

- Microsoft Word 2007 is installed if you plan to use Microsoft Word digital signature service; otherwise, install Microsoft Word 2003 or a later version.

After installing Adobe Acrobat, you have to delete the installed Adobe PDF printer and install it again and update Adobe settings. When re-installing a printer:

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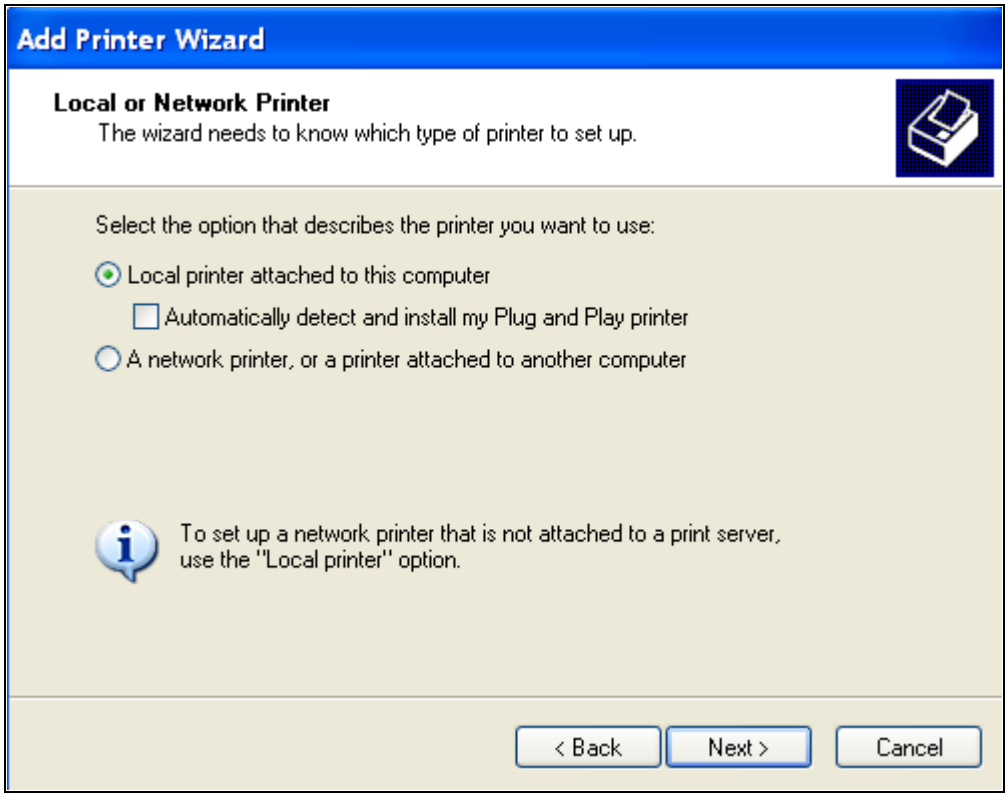
1. Access the Add Printer Wizard page by selecting Start, Control Panel, Printers and Faxes, Add Printer, and clicking Next. This example illustrates the Add Printer Wizard window:



Add Printer Wizard window

2. Select Local Printer attached to this computer.

   Ensure that the Automatically detect and install my Plug and Play printer check box is deselected.

3. Click Next, and select the *Desktop*.pdf {Adobe PDF Port}* value in the Use the following port field on the Add Printer Wizard/Select Printer Port window.

4. Click Next, and then click the Have Disk button on the Add Printer Wizard/Install Printer Software window.

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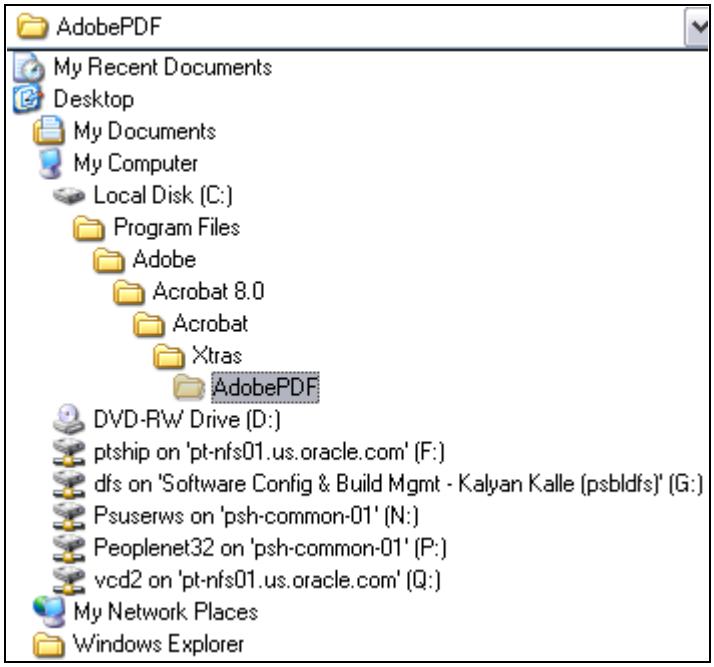
5. Select the Browse button on the Install From Disk window to locate the AdobePDF.inf file. Select the AdobePDF folder as shown in this example:



Locate File window

6. Select the *Adobe PDF Converter* printer at the top of the list and click Next.
7. Select to keep the existing driver on the Add Printer Wizard - Use Existing Driver window, and click Next.
8. Enter *Adobe PDF* for printer name on the Add Printer Wizard/Name Your Printer window and select No to indicate that you do not want this to be the default printer, then click Next.
9. Select Do not share this printer on the Add Printer Wizard: Share Printer window and click Next.
10. You can print a test page or select No and click Next to complete the wizard.

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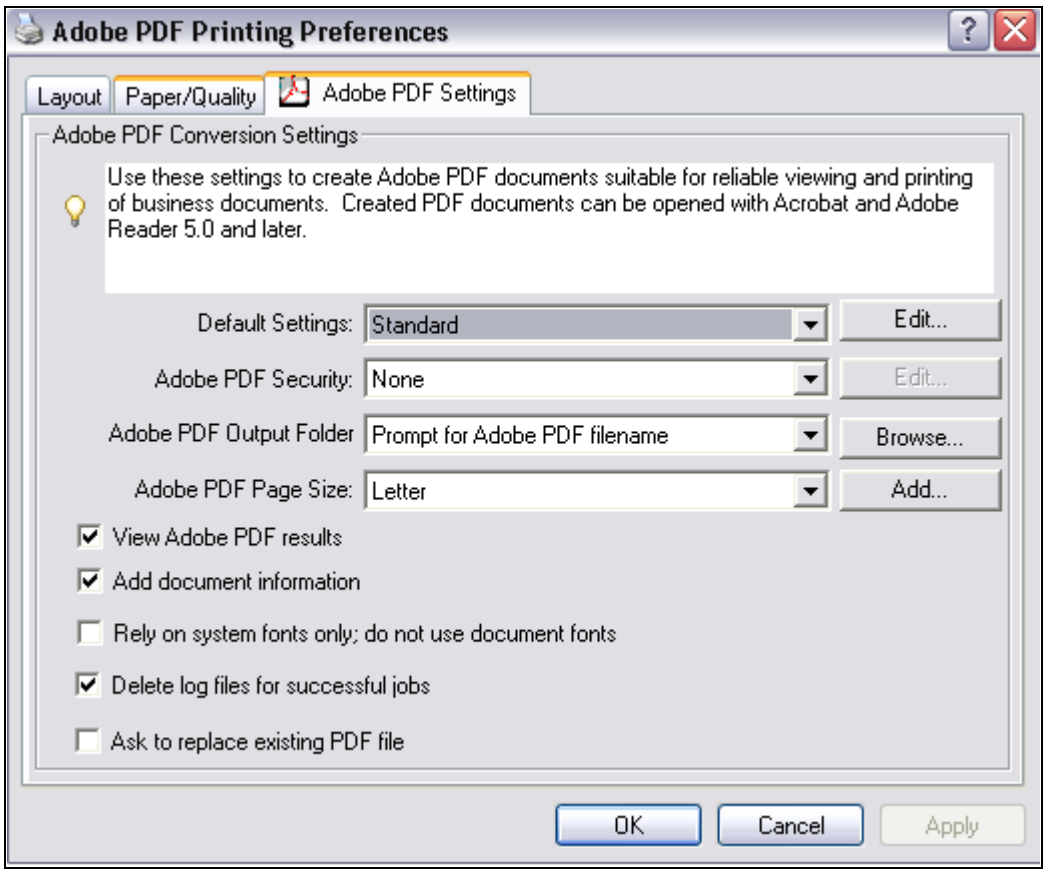
11. Access the properties for the installed Adobe PDF printer, and click Printing Preferences on the General tab. The next window appears:



Adobe PDF Printing Preferences window

12. Deselect the Rely on system fonts only; do not use document fonts check box.

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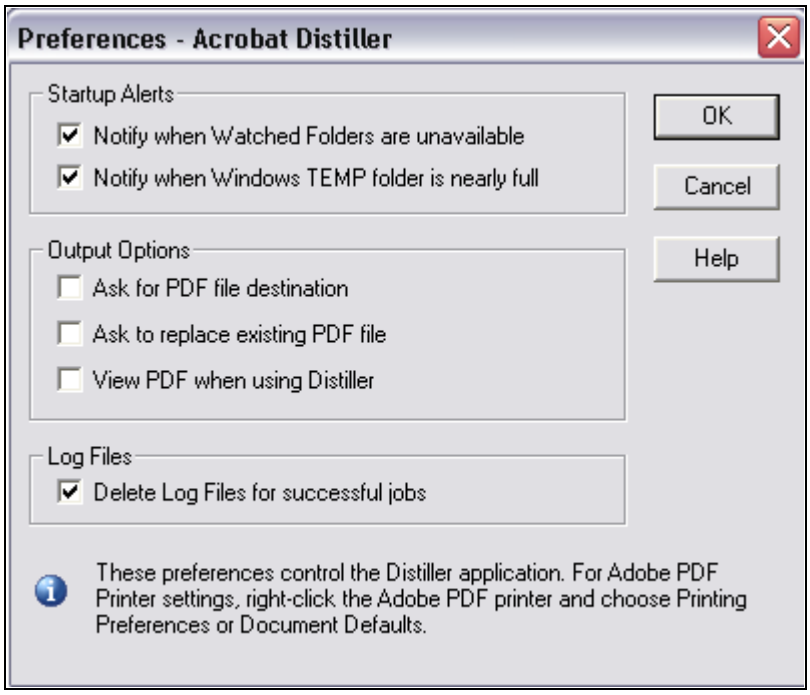
13. Click OK, and then select the Advanced tab, and select Printing Defaults. Also, deselect the Rely on system fonts only; do not use document fonts check box.

    If Adobe Acrobat is installed, it is recommended that you check the option to delete log files. These files are created when dispatching a contract document in PDF or preparing document for digital signature. You access the page by launching Acrobat Distiller and selecting Edit, Preferences. This example illustrates the Preferences window:



Preferences - Acrobat Distiller window

Note. You use Acrobat Distiller when a file is being converted to PDF from a Microsoft WordML format to support Adobe digital signature or to dispatch a contract document in PDF.

Installing and Configuring Microsoft Word and Acrobat Components on Workstations

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 setup 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 most importantly enable signature rights for others to sign a document using the Adobe Reader must have Adobe Acrobat 8 Professional installed on their workstation.

To install and configure Microsoft Word for use with the Research task pane:

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Microsoft Word Research Task Pane Workstation Installation

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 workstation, 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 workstation of each user who wants to use the Microsoft Word task pane integration with PeopleSoft Supplier Contract Management. Normally, this would be 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 Tools on the toolbar, and then selecting Research from the menu using Microsoft Word 2003 and earlier versions.

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. The default is version 11.0 for Microsoft Word 2003. For Microsoft Word 2003, use 11.0 ([WordVersion] Version=11.0) and for Microsoft Word 2007, use 12.0. Here is an example of the version setup for Microsoft Word 2003 client usage of the research pane integration:

```
;For Word 2003, use 11.0  For Word 2007 use 12.0
[WordVersion]
Version=11.0
```

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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's 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 2003 or later.
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.

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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.

To complete workstation setup for Adobe Acrobat 8 Professional, users who enable signatures should deselect the option to display the PDF in their browser after Adobe Acrobat is installed on their workstation. This is required so that the specialist can properly sign and certify signature files after preparing them within PeopleSoft Supplier Contract Management. The system launches Adobe Acrobat on the specialist's workstation as part of the document preparation process. To deselect to display the PDF in the browser:

1. Launch Adobe Acrobat on each workstation.
2. From the Adobe toolbar, select Edit, Preferences, and select Internet from the Categories scroll area.
3. Deselect the Display PDF in browser check box.

Setting Up Digital Signatures

This section provides an overview of how to set up digital signatures for signing authored documents and discusses the two methods and the setup needed to enable the preparation and capture of signatures using either:

- Adobe Acrobat digital signatures.
- Microsoft Word 2007 digital signatures.

Understanding How to Set Up Digital Signatures

This section discusses

- Digital signature overview and considerations.
- Methods used to create signature clauses.
- Digital signature set up steps.

Digital Signature Overview and Considerations

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:

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- 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.

Implementation considerations for which technologies you use with digital signatures include:

- Adobe Acrobat product (.pdf)

  Using Adobe Acrobat enables you to prepare a .pdf document for signature purposes from a Microsoft Word 2003 .xml document format. This enables internal and external users to sign documents using Adobe Reader. To enable this feature when you using Microsoft Word 2003, you must have a copy of Adobe Acrobat 8 on the same Windows application server as the Microsoft Word 2003 installation used to do document compares or .doc format dispatches.

  See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up PeopleSoft Integration Broker Window Servers for Use with Microsoft Word and Adobe Acrobat, page 208.

  When documents are ready to be prepared, 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 specialists can enable and certify (sign) the document. Each document administrator must also have Adobe Acrobat version 8 on the client in order to enable the document so that others may sign it using the Acrobat Reader and certify it by indicating that the document is signed and certified.

  Alternatively, when using the .pdf format with Microsoft Word 2007, you can choose to use Microsoft Word 2007 to render the initial .pdf file on the server instead of Adobe Acrobat 8. This is a similar configuration as using the Adobe Acrobat PDF format with Microsoft Word 2003, however with Microsoft Word 2007, the capability exists to render a PDF directly from Microsoft Word. With this configuration, you only need Microsoft Word on the Windows application server and not Adobe Acrobat 8. Adobe Acrobat 8 is; however, still needed for each of the document administrators to enable and sign and certify the document before it's routed for signatures.

- Microsoft Word 2007 (.docx).

  If your internal standard is for Microsoft Word is 2007 (not 2003), you must still use the Microsoft Word 2003 XML format for general authoring, editing, and collaboration. You can optionally choose to prepare a signable Microsoft Word document from 2007 (.docx) instead of a PDF. This method uses Microsoft Word 2007 to prepare a signable .docx file of the document instead of a PDF while maintaining the Microsoft Word 2003 .xml format for future editing. 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 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.

  See Chapter 13, "Managing Document Life Cycles," Signing Documents Using Digital Signatures, page 572.

- 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.

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- 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. 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. 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.

  Invisible signatures still require a signature postscript placeholder image file that is unique. In setting up signatures for a document, and you know there are five invisible signers, then you will need five invisible signature placeholder files. Inside the placeholder file, the title can read invisible signer one, invisible signer two and so on. You can use any signature label that you want to provide the invisible signers.

Note. Using digital signatures to sign contract documents is described in the Managing Document Life Cycles chapter.

See Chapter 13, "Managing Document Life Cycles," Signing Documents Using Digital Signatures, page 572.

Methods Used to Create Signature Clauses

You can set up digital signature clauses using these methods:

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- Generic signature fields.

  This method is the recommended method for digital signature. You use a generic signature field for a given signature role, such as contract specialist, director, or vice president. These generic signature fields are defined within postcript text files that are then inserted as images into the Microsoft Word version of the clause.

  To create a signature field, you insert the postscript file as a picture file while editing a clause in Microsoft Word. The field will appear as a blank image in the Microsoft Word document. When a contract document is ready for digital signature, the Microsoft Word 2003 XML file is converted to a PDF and the blank image is converted to a signature field where it can be signed. A signature field is a placeholder for a signer to sign in. The signature image in a PDF will appear as a rectangular box.

  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.

  Note. The PeopleSoft Financials/Supply Chain sample database contains some sample Microsoft Word clauses named CL_SAMPLE_PDF_SIGN1 (2,3) for reference and use. These are sample clauses where a postscript file has been inserted into Microsoft Word as described later in this section.

  See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Adobe Acrobat 8 Digital Signatures Using Postscript Files, page 221.

- Specific user-signature fields.

  This method for creating signature clauses provides each individual signer a unique signature field. With this method, you create a postscript file using the PeopleSoft-delivered file with a specific signer's name in the file. Then, you create a unique clause with the created postscript file. 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.

  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. Separately, but as important, is the signature field provided for each of the signers within the document as previously discussed using postscript file for PDF. 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 in a clause is created by inserting a picture using the signature postscript file. A sample postscript file is delivered by Oracle, but it has to be edited to show the signer's name or title. If you are using Microsoft Word 2007 digital signatures, a signature field in a clause is created by inserting Microsoft Office signature line where you will specify the signer's name, title, and email address.

  Note. When you use Microsoft Word 2007, you don't need the image files. You insert the signature field using Microsoft Office Signature Line and place the binds underneath the signature fields. You still insert the signers generically.

Note. For Microsoft Word 2007 review flow, you don't need the image files. Just insert the signature field into the clause using Microsoft Word 2007 and check in the clause using the Word 2003 compatible XML format. When you insert the fields, you enter the specific signer title or names into the fields.

Digital Signature Set Up Steps

To set up digital signatures:

1. Setup PeopleSoft Integration Broker to enable rendering of signature documents.

   Note. Consider verifying your setup for server processing by performing a trial run for sending the document to contacts using the PDF format. Click the Send to Contacts button on the Document Management page to perform the test.

   See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," (Optional) Setting Up PeopleSoft Integration Broker for Microsoft Word and Adobe Integration, page 202.

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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 for digital signatures. 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.

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 Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Signing External Documents, page 144.

5. Create postscript signature files to use in signature clauses and sections as placeholders for digital signatures.

   The system provides two sample postscript files, one for visible signatures and one for invisible signatures.

6. 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. These clauses contain some sample inserted postscript files from step 5.

7. Add signature placeholders sections and clauses to document configurators.

8. 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 Vendor Contact page to define external contacts for signing.

   The routing and signing process is described in the Managing Document Life Cycles chapter.

   See Chapter 13, "Managing Document Life Cycles," Signing Documents Using Digital Signatures, page 572.

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Adobe Acrobat 8 Digital Signatures Using Postscript Files

To create a signature field for Adobe Acrobat documents, you use a postscript file to insert a signature field when editing a clause, section, or contract document in Microsoft Word. A signature field displays as an image in the Microsoft Word document. When a contract document is prepared for signature, the system converts the document to a PDF and the signature fields are displayed as Adobe Acrobat digital signature fields and signers can sign the document using Adobe Digital IDs.

A sample postscript file is included in your installation directory. For each signature field or signer in a contract document, you should:

1. Open a copy of the postscript file (SignatureField.eps) in Notepad (or other text editor), edit the text after the /T symbol, and save the file as a <filename>.eps extension.

   You can either enter the same text for the /TU for tooltip on the signature field, or you can delete the line.

2. Edit the appropriate clauses in Microsoft Word, and from the toolbar, insert the file (Insert, Picture, From File) and select the appropriate <filename>.eps file that you just saved.

   The image appears within the clause as an empty highlighted box. This is the signature field that will convert and display within the PDF after the document is authored with this clause and prepared for signature.

Adobe uses a postscript image placeholder file to insert signature boxes into a contract document. Adobe places a special postscript signature placeholder file image in the document, such as within a clause or section to gather signatures. When the document is converted to a .pdx file the placeholder file becomes the signature area in the document and enables signers to sign the document using digital IDs.

This example illustrates the delivered postscript SignatureField.eps file:

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```
%!PS-Adobe-3.0 EPSF-3.0
%%BoundingBox: 0 0 200 50
%%Title: (Signature Field)
%%Creator: (Adobe Systems Inc.)

% This example illustrates how to define a signature field
% Each signature field used in a document must have a unique name identified by⇒
 "Signature1" at the end of this file

% Set __pdfMark__ true if pdfmark is already defined
%%BeginPDFMarkPrefix
/pdfmark where {
pop
/__pdfMark__ true def
}{
/pdfmark {cleartomark} def
/__pdfMark__ false def
} ifelse
%%EndPDFMarkPrefix

% Includes these required entries:
% Fields (the array from where all fields in the form can be found)
% NeedAppearances boolean, set to true so field appearances are generated when the⇒
 document is opened
[ /_objdef {afields}
/type /array
/OBJ pdfmark
[ /_objdef {aform}

/type /dict
/OBJ pdfmark
[ {aform}
<<
/Fields {afields}
/NeedAppearances true
>>
/PUT pdfmark

[ {Catalog}
<<
/AcroForm {aform}
>>
/PUT pdfmark
%%>> %End AcroForm

% Actual signature field Signature field
[
/Subtype /Widget
/Rect [ 0 0 200 50 ]
/F 4
/T (Signature1)
/TU (Signature1)
/FT /Sig
/Ff 0
/MK << /BC [0 0 0] /BG [1 1 1] >>
/BS << /W 1 /S /S >>
/ANN pdfmark

%%EOF
```


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Note. Each of these signature placeholder image files must have a unique signer name as the /T symbol in the SignatureField.eps postcript file when the system creates the document. So, if the created document has three signature fields, the /T value specified in each of the postscript file must be different. PeopleSoft Supplier Contract Management provides visible and invisible signature postscript files. You can edit the postscript files to create as many unique files as you want with either generic signature titles or specific names embedded in the file.

Note. Clauses with signature placeholders cannot be repeating clauses. Otherwise you could have created one clause with one signature file image in it and then treated it as a repeating clause against a list of signers. A signature field must be unique within the document based on signer name.

Microsoft Word 2007 Digital Signatures

When using Microsoft Word 2007, you create a signature field in the Microsoft Word document using Microsoft Office 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 in this case. 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 2007 signatures requires that you edit the Microsoft Word versions of the signature clauses using Microsoft Word 2007, but in the .xml format, adding the appropriate signature fields within the clause. Generic signatures are recommended when possible. When using Microsoft Word 2007 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. 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 on the server.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding System Setup for Microsoft Word Configuration Files and PeopleSoft Integration Broker, page 202.

Defining Installation Options for PeopleSoft Supplier Contract Management

To set up installation options, use the Installation Options component (INSTALLATION_CS).

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This section provides overviews of document comparisons and rendering and document comparison and rendering setup and discusses how to define installation options for PeopleSoft Supplier Contract Management.

Understanding Document Comparisons and Rendering

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 impact 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 in which the system provides files in a .doc or a .pdf format to users who do not want to use Microsoft Word 2003 to view the documents. When the system creates XML documents, they are meant to be opened only using Microsoft Word 2003. 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.

Understanding Document Comparison and Rendering Setup

To compare and render documents, you must enable the features using the Installation Options page. Using installation options, you define a directory path name for the Windows NT application server that will serve as a temporary location for document processing for server-side comparisons and document rendering of .xml documents. You also define the machine name of the Windows NT application server and port that has been set up with Microsoft Word 2003 and the CSDOCUTIL.DLL file.

Note. The temporary directory should be operating-system specific if a single operating system is being used in the implementation for all applications servers. If multiple operating-system application servers are in the implementation (for example Unix and NT), you should leave the Application Server Path field blank on the Installation Options page.

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.

Note. Your database administrator will need to assist you with this setup.

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

To prepare a system to use the compare and render features:

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1. Ensure that a Microsoft Windows-based server machine, such as Windows 2000 or Windows XP, has PeopleTools installed on it.

   The machine must be set up as an application server in the system. 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. If you select the Enable Rendering .doc check box in installation options, ensure that the same server machine has Microsoft Word 2003 installed on it.

   The CSDOCUTIL program interacts with Microsoft Word 2003 on the machine.

3. If you are select the Enable Rendering .pdf check box in installation options, ensure that the same server machine has Adobe Acrobat 8 installed on it.

   The CSDOCUTIL program interacts with Adobe Acrobat 8.

4. Configure the Integration Gateway if it's 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.

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

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5. 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," *Enterprise PeopleTools PeopleBook: Integration Broker*.

      See "Managing Service Operations,"*Enterprise PeopleTools PeopleBook: 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, while 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.

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

   g. Ensure 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 to 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.

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j. Select the Active check box.

k. Click the Save button.

See Understanding Integration Setup, "Appendix: Integration Scenarios," *Enterprise PeopleTools PeopleBook: Integration Broker.*

6. Set the CS_DOC_LIBRARY queue status to *Run.*

A queue isolates different groups of service operations from each other. The CS_DOC_LIBRARY queue queues the CS_DOC_ACTION service operation for processing.

See "Managing Service Operation Queues,"*Enterprise PeopleTools PeopleBook: Integration Broker.*

To set the queue status:

a. Select PeopleTools, Integration Broker, Integration Setup, Queues.

b. Ensure that *Run* is selected in the Queue Status field.

c. Click the Save button.

7. Complete the fields in the Document Compares & Rendering grid in the Installation Options component.

This is a part of setting up the PeopleSoft Supplier Contract Management application and is described in the next sections.

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

Page Used to Define Installation Options for PeopleSoft Supplier Contract Management

Page Name	*Definition Name*	*Navigation*	*Usage*
Installation Options	INSTALLATION_CS	Supplier Contracts, Supplier Contracts Setup, Installation Options Click the Supplier Contract Management link on the Installation Options page.	Define installation options for PeopleSoft Supplier Contract Management.

Defining Installation Options for PeopleSoft Supplier Contract Management

Access the Installation Options page (Supplier Contracts, Supplier Contracts Setup, Installation Options).

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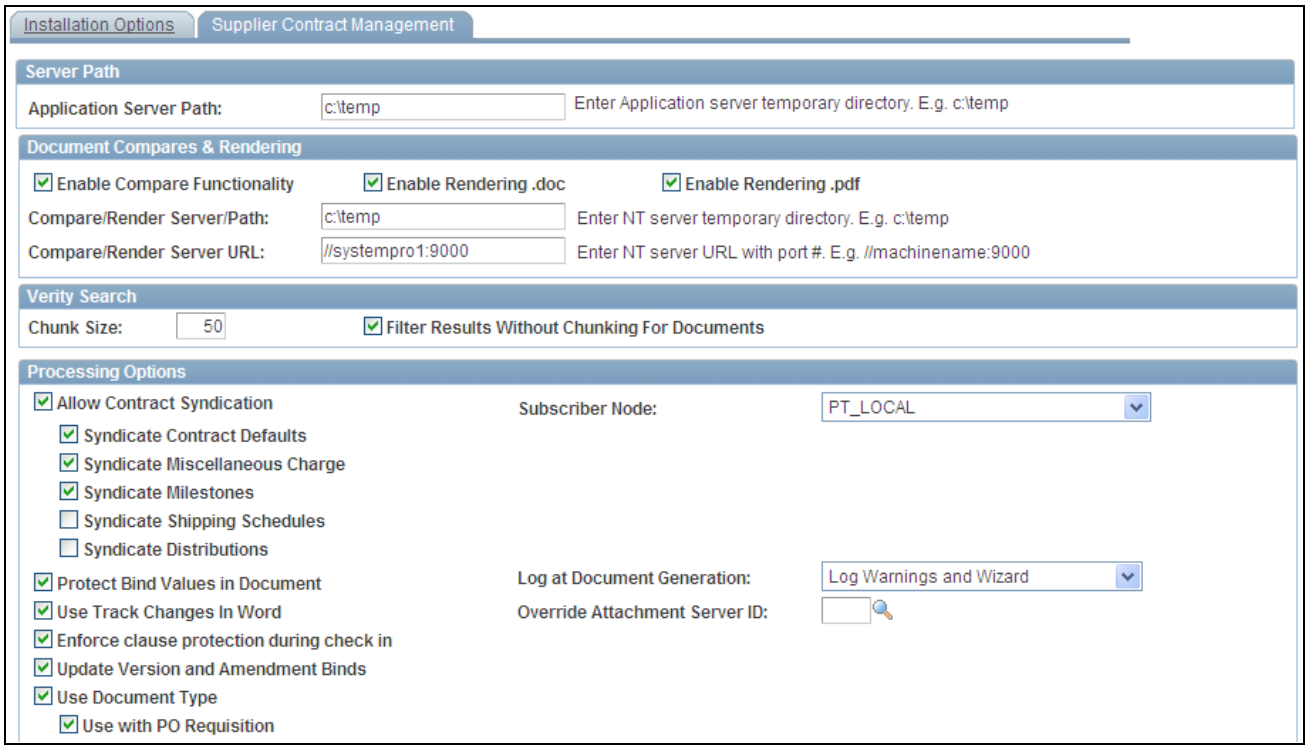
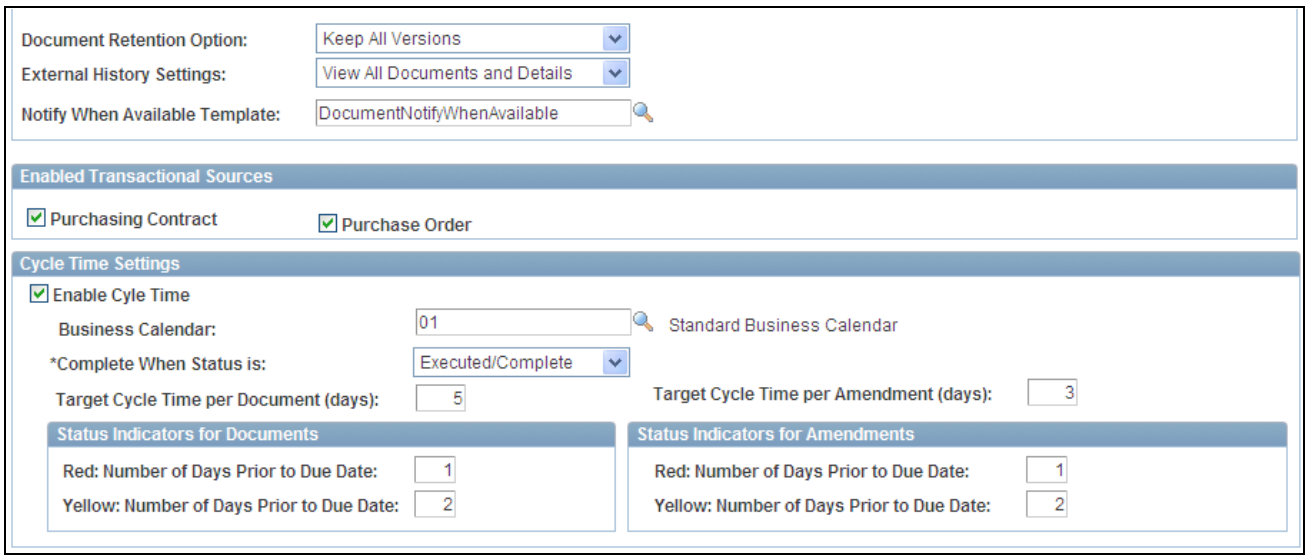


Installation Options page (1 of 3)



Installation Options page (2 of 3)

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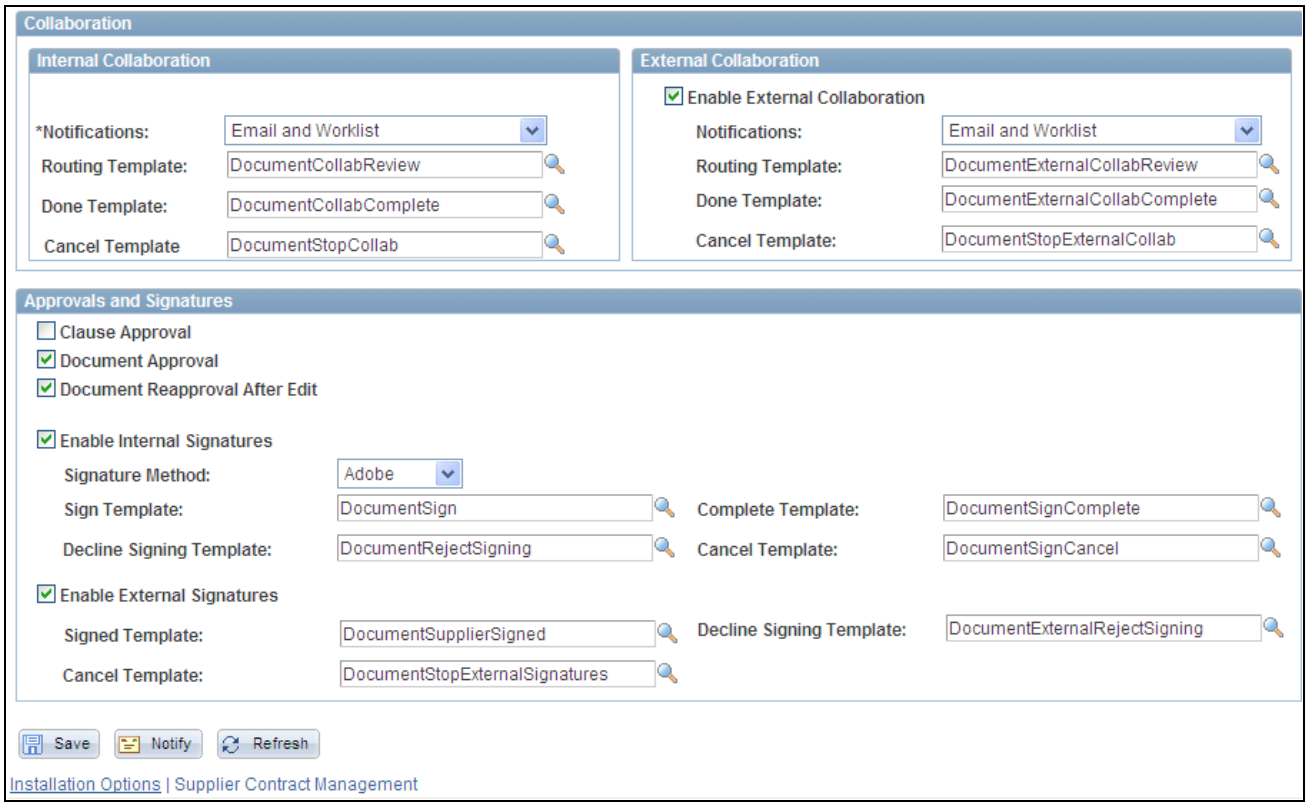

Installation Options page (3 of 3)

Use this page to define servers, server paths, compare and render options, Verity searching, 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.

Application Server Path 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 *c:\temp*, which exists on Windows NT application servers.

Note. 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 NT, you should leave this field blank.

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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.

Also, you can optionally create a Microsoft Word .doc or Adobe .pdf version of the XML-generated documents to send to suppliers who might be using a version of Microsoft Word that is prior to Microsoft Word 2003. After you enable rendering, the system displays the correct rendering options on the Send to Contacts and Dispatch to Contacts pages.

Enable Compare Functionality — Select to permit the document administrator to run a server-side comparison of the current authored document against a re-created 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.

Enable Rendering .doc — 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 Microsoft Word 2003 and cannot read an .xml version of the file.

Enable Rendering .pdf — Select to permit the generation of an Adobe .pdf format document when dispatching a document or sending it to contacts.

Compare/Render Server/Path — Enter a directory path name for the Windows NT application server that will serve 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.

Compare/Render Server URL (compare/render server uniform resource locator) — Enter the machine name of the Windows NT application server and port that has been set up with Microsoft Word 2003 and the CSDOCUTIL.DLL file. The Compare/Render Server URL 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 using the NT machine. The machine is the NT application server machine. 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 NT machine where Microsoft Word 2003 Professional or Adobe Distiller is installed so that the comparison or rendering to .doc or .pdf can take place.

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 NT machine.

Verity Search

Use this group box to specify Verity index search options. PeopleSoft Supplier Contract Management uses Verity searching to perform content searches on elements in the library. For example, you can search clauses and sections, the latest versions document content, and transactional-related contract data for purchasing contracts.

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Chunk Size Enter the number of returned rows that you want to retrieve and display when you perform a Verity search. If you do not enter a value, the system retrieves 20 rows at a time.

Filter Results Without Chunking For Documents Select to enable filtering of search results based on user security access to the document. When you select this check box, only rows for users who have access to documents appear in the search results. These users can include administrators or interested parties as examples. This helps reduce the number of results. When you select this check box, the system ignores the chunk size value when searching for documents.

See Chapter 14, "Searching for Library and Document Contents," page 591.

See *PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook*, "Implementing the Verity Search Engine."

Processing Options

Use this group box to define 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 as well as the consistency of setup data between the two systems, you might not want to syndicate this optional information.

The default value for all check boxes in this group box is deselected.

See Chapter 7, "Syndicating Supplier Contracts and Contract Messaging," page 157.

Allow Contract Syndication Select to indicate that you want to include syndication as part of the contract process. When you select this check box, the system includes the Syndication tab on the Contract Entry page.

If you use contract syndication and the Allow Contract Syndication 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.

Subscriber Node 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 Allow Contract Syndication has been selected.

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.

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Syndicate Contract Defaults Select to include purchase order defaults as part of the syndicated contracts. The defaults include header and shipping information, and you click the PO Defaults link on the Contract page to view them.

Syndicate Miscellaneous Charge 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 costs, insurance, and a variety of other costs that are incurred to deliver purchased goods to a location.

Syndicate Milestones 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.

Syndicate Shipping Schedules 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.

Syndicate Distributions Select to include syndicated distributions in syndicated contract information. During syndication, the system processes distribution percentages and amounts and verifies that the distribution amount does not exceed the contract line amount.

Protect Bind Values in Document When you protect bind values, and the system generates authored documents, Microsoft Word 2003 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 want them primarily controlled by wizard or transactional changes within the PeopleSoft system.

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.

Log at Document Generation 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 *Details* 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.

Select *Log Warnings and Wizard* 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.

Use Track Changes in Word Select to make Track Changes 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.

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Override Attachment Server ID

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.

Note. Overriding an attachment server should be an exception and only performed when absolutely necessary. Overriding the server can affect the use of Verity searching in PeopleSoft Supplier Contract Management.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Document Comparison and Rendering Setup, page 224.

Enforce clause protection during check in

Select to indicate that the system should protect clauses. This places Microsoft Word protection tags around the specific clause to help prevent users from making any changes to the clause. When you select the check box, the system prevents the check-in of a document if any of its protected clauses have been changed by users within Microsoft Word.

If you do not select this check box, the system displays a warning about the protected clause that has been modified; however, it allows the check-in of the document.

Update Version and Amendment Binds

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.

If you do not select this check box, the system will not automatically update any version or amendment bind values within an authored contract document.

Use Document Type

Select to indicate that you want to make document type categorization available for contract documents. Using document types provides user-defined categorization of 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.

Using document types, you can define specific settings, defaults, and security that provide you better control over the flow of document creation and life cycles of the various documents that you generate in your organization.

When you select this check box, the system also makes the Use with PO Requisition check box available.

See Chapter 9, "Managing the Contract Library," Understanding Document Types, page 305.

See Chapter 9, "Managing the Contract Library," Setting Up Document Types, page 354.

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Use with PO Requisition (use with purchase order requisition)

Select this check box if you intend to create documents related to requisitions that will 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 later. Selecting this check box enables you to set up document types that allow this association to requisitions.

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 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 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.

The system will display the Add Request Document link on Maintain Requisitions page in Purchasing and on the Create Requisition page in eProcurement when you select the Use with PO Requisition check box.

The default value for the check box is deselected. You must first select to use document types before you can select to enable the launch of a request for a requisition. This is because the Use with PO Requisition feature is enabled on the Document Type page.

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.

Document Retention Option

Select a document retention option to indicate how you want the system to retain executed documents. Values are:

Keep All Versions: Select to keep all versions of a document after the document is executed. Document history will continue to provide links to all intermediate versions.

Keep Only Executed Versions: Select this option if you want all intermediate versions to be purged 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 FTP server. This includes intermediate collaboration copies and intermediate signed copies. Only the final executed version remains in the system.

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External History Settings

Use this field to select the external users Supplier Portal view access options to the history of contract documents. Values are:

Disable Viewing once Executed: 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.

View All Documents and Details: Select to provide supplier view access to all document details including their collaboration versions, attachments and all past executed versions.

View Only Executed Documents: Select to provide external suppliers with only view access to the final signed and executed document after each negotiation is completed. This options displays summary action and history rows, but does not include review and collaborations details.

Notify When Available Template

Select a notification template for use with the Notify Me button on the Document Management page. Use this button 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.

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 Verity searches based on the transactional source that you select. You do not need to enable the ad hoc source because it is always available.

Purchasing Contracts

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 Chapter 2, "Understanding PeopleSoft Supplier Contract Management," Transactional Purchasing Contracts, page 11.

Purchase Orders

Select to enable document creation or association with transactional purchase orders in PeopleSoft Purchasing. The default value for the check box is deselected.

See Chapter 2, "Understanding PeopleSoft Supplier Contract Management," Transactional Purchase Orders, page 11.

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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.

Enable Cycle Time Select to indicate that cycle times should be enabled for this installation of PeopleSoft Supplier Contract Management. After you select the check box, the system makes the related fields available.

Business Calendar 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 Set Up Financials/Supply Chain, Common Definitions, Calendar/Schedules, Business Calendar, Business Calendar.

Complete when Status is 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 through to its signed and executed.

You can end document and amendment cycle tracking at these statuses:

Approved

Dispatched

Executed/Complete

Pending Approval

Target Cycle Time per Document (days) 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 Complete when Status is field. The system calculates the cycle time using the business calendar so that only official business days are counted based on the calendar.

Target Cycle Time per Amendment (days) Enter the target number of days that a contract amendment should take to complete.

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Red: Number of Days Prior to from Due Date

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.

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.

Yellow: Number of Days Prior to Due Date

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.

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.

Notifications

Select the method that the system should use to notify internal collaborators that a document has been routed to them for collaboration. Values are:

Email: Select to notify collaborators using email only.

Email and Worklist: Select to notify collaborators using both email and worklist methods.

None: Select to indicate that a notification is not required.

User Preference: Select to use the method defined on a user's preference.

Worklist: Select to notify collaborators using worklist only.

Routing Template

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 *DocumentCollabReview* system-supplied value appears as the default value for the template.

See Defining Generic Templates, "Using Notification Templates," *Enterprise PeopleTools PeopleBook: Workflow Technology.*

Done Template

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 *DocumentCollabComplete* system-supplied value appears as the default value for the Done template.

Cancel Template

Select the template that the system should use to alert any pending collaborators when internal collaboration has been canceled for a document. The *DocumentStopCollab* system-supplied value appears as the default value for the Cancel template.

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External Collaboration

External Collaboration 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 Microsoft Word 2003, Professional version. This version enables suppliers to make changes and check in the document as an .xml document. If suppliers do not use Microsoft Word 2003, they need to use a Word 2003 viewer and save the document as a .doc document. The supplier can check in a .doc version of the document, but the contract administrator will have to manually reconcile any changes.

Note. You must enable external collaboration using this check box before you can enable them for a document type on the Document Type page.

See Chapter 13, "Managing Document Life Cycles," Document Collaboration for External Users, page 544.

Notifications 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:

Email: Select to notify collaborators using email only.

Email and Worklist: Select to notify collaborators using both email and the worklist.

None: Select to indicate that a notification is not required.

*User Preference:*Select to use the method defined on the user's preference.

Worklist: Select to notify collaborators using worklist only.

Routing Template 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 *DocumentExternalCollabReview* system-supplied value appears as the default value for the template.

See Defining Generic Templates, "Using Notification Templates," *Enterprise PeopleTools PeopleBook: Workflow Technology*.

Done Template 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 *DocumentExternalCollabComplete* system-supplied value appears as the default value for the Done template.

Cancel Template 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 *DocumentStopExternalCollab* system-supplied value appears as the default value for the Cancel template.

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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.

Clause Approval 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.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up Approval Types, page 243.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Establishing Clause Classes, page 246.

See Chapter 16, "Configuring PeopleSoft Approval Framework for Use with Supplier Contract Management," page 635.

See Chapter 17, "Approving Documents and Document Components," page 649.

Document Approval 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 Approve button to approve the document for final dispatch to supplier for signature.

See Chapter 17, "Approving Documents and Document Components," page 649.

Document Reapproval After Edit Select to indicate that if a document is edited after being approved, it must then be reapproved. Depending on organization internal controls for documents, this may or may not be required.

Enable Internal Signatures Select to enable internal users to digitally sign a document using Adobe Acrobat or Microsoft Word signatures. When you select this check box, you must also select a value in the Signature Method field. Also, when you select to enable internal signatures, the system makes the Enable External Signatures check box available. Typically, the electronic version of the contract can replace the paper-based version.

When you enable internal signatures, the Prepare Document for Signing button appears on the Document Management page. The button enables you to convert a document to a .pdf file, stage it for signing, and signal to the system that the document is available for signing. This invokes additional buttons that enable you to convert the document.

Note. Because digital signature methods are installation wide, you must enable internal signatures using this check box before you can enable them for a document type on the Document Type page.

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Signature Method Select the method for signing a contract document. If you enable internal signatures, you must select a value in this field or the system displays an error message when you save the settings. Signature method values include:

Adobe: Select to sign documents using Adobe Systems software. To use this signature method, you must have Adobe Distiller 8 on the NT application server that is 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.

Word: Select to sign documents using Microsoft Word. To use this signature method, you must have Microsoft Word 2007 on the NT application server that is defined in the Document Compares and Rendering section. In addition, users who are required to sign the document must use Microsoft Word 2007 to sign the document.

Sign Template Select the template that you want to use to send out to internal signers when a document is routed to them for electronic signatures. The *DocumentSign* system-supplied value for the Sign template appears as the default value for the field.

Complete Template Select the template that you want to use when the routing for internal signatures is complete. The *DocumentSignComplete* system-supplied value for the Complete template appears as the default value for the field.

Cancel Template Select the template that you want to use to alert any pending signers when the routing for internal signatures is canceled. The *DocumentSignCancel* system-supplied default value for the Cancel template appears as the default value for the field.

Decline Signing Template Select the template that you want to use when an internal user declines signing a document. The *DocumentRejectSigning* system-supplied value for the Decline Signing template appears as the default value for the field.

Enable External Signatures 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.

Note. Because digital signature methods are installation wide, you must enable external signatures using this check box before you can enable them for a document type on the Document Type page.

Signed Template Select the template that you want to use when an external user has electronically signed a document. The *DocumentSupplierSigned* system-supplied value for the Signed template appears as the default value for the field.

Decline Signing Template Select the template that you want to use to alert the contract administrator when an external user declines signing a document. The *DocumentExternalRejectSigning* system-supplied value for the Decline Signing template appears as the default value for the field.

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Cancel Template Select the template that you want to use to alert external users when the external signature process is canceled. The *DocumentStopExternalSignatures* system-supplied value for the Cancel template appears as the default value for the field.

Defining Clause Libraries and Groups

To set up clause libraries, use the Clause Library Setup component (CS_LIBRARY).

To set up clause groups, use the Clause Group Setup component (CS_CLS_GROUP_DEFN).

This section provides an overview of clause libraries, groups, and classes and discusses how to:

- Define clause libraries.
- Define clause groups.

Understanding Clause Libraries, Groups, and Classes

You use clause libraries to define a broad grouping of contract clauses. Each clause can belong to only a single library code. Library codes provide a simple method to categorize a complete set of clauses. You can use library codes as search criteria when searching for clauses.

Use contract clause groups to help organize and categorize clauses. Clause groups provide a user-defined means for categorizing clauses as needed. For example, you might have a group of clauses relating to indemnification for work that is performed at the buyer's site. You can associate member clauses with a clause group for work-site indemnification and then address or select the clauses as a group when creating a document configurator.

Note. A clause can belong to more than one clause group at a time.

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, including a default that enables you to define how the clauses of that class are to be approved. For example, when you create a new clause, you must specify a class. Depending on the class that you select, the system can supply the appropriate workflow for the class by default based on the presence of an approval type on the class.

In addition, you can define alternative approval types on the class. This enables you to further select the appropriate workflow if needed. For example, you can choose to use the class as a higher level category of clauses with zero to *n* appropriate approval types and descriptions. This enables you to select the appropriate routing, or conversely use the class to define a more detailed grouping, such as a high risk factor, and force a single approval type for the class that cannot be altered by other users.

See Also

Chapter 9, "Managing the Contract Library," Defining Contract Clauses, page 307

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Establishing Clause Classes, page 246

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Pages Used to Define Clause Libraries and Groups

Page Name	*Definition Name*	*Navigation*	*Usage*
Library Definition	CS_LIBRARY_DEFN	Supplier Contracts, Supplier Contracts Setup, Libraries	Define clause libraries.
Group Definition	CS_CLS_GROUP_DEFN	Supplier Contracts, Supplier Contracts Setup, Groups	Define clause groups.

Defining Clause Libraries

Access the Library Definition page (Supplier Contracts, Supplier Contracts Setup, Libraries).

Use this page to define a clause library. 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. To access the field, select Supplier Contracts, Manage Contract Library, Clauses.

Note. Clause library codes provide a means for a simple broad grouping of clauses. They do not control clause access or row-level security. Permission lists and setIDs control access to clauses.

Defining Clause Groups

Access the Group Definition page (Supplier Contracts, Supplier Contracts Setup, Groups).

Use this page to add and update clause group definitions. You can use groups to categorize clauses. When selecting clauses for use on document configurators, you can use clause groups as search criteria. You can associate contract clauses with groups by clicking the Associate to Clause link on the Clause Definition page. To access the field, select Supplier Contracts, Manage Contract Library, Clauses.

You can add all clauses that are related to a group to a document configurator or section, but the intent is only for aiding the selection of clauses during clause addition to the configurator. For example, after you add clauses by group, the clauses are individually maintainable within the configurator as if you added them individually.

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

To add a clause group:

1. Enter the name of the group in the Group Name field and click Add.
2. Type a description of the clause group, and click Save.

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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.

Setting Up Approval Types

To set up approval types, use the Approval Type Setup component (CS_APPROVAL_TYPE).

This section provides an overview of approval types and discusses how to define approval types.

Understanding Approval Types

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:

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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.

See Also

Chapter 16, "Configuring PeopleSoft Approval Framework for Use with Supplier Contract Management," page 635

Page Used to Set Up Approval Types

Page Name	*Definition Name*	*Navigation*	*Usage*
Approval Type	CS_APPROVAL_TYPE	Supplier Contracts, Supplier Contracts Setup, Approval Types	Define approval types.

Defining Approval Types

Access the Approval Type page (Supplier Contracts, Supplier Contracts Setup, Approval Types).

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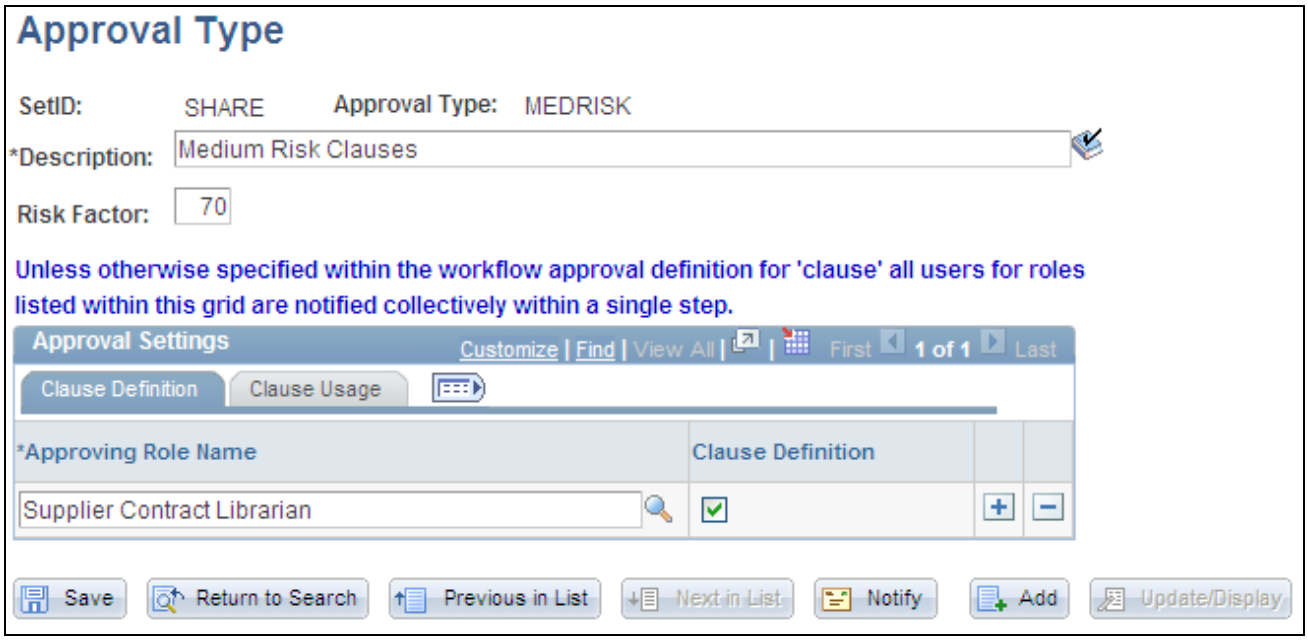

Approval Type page: Clause Definition tab

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.

Description Enter a description for the approval type. This field is required.

Risk Factor 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.

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.

Note. Risk factors are not incorporated within contract workflow processing.

Approving Role Name 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.

Clause Definition Select to require that this user role is included for clause approval cycles with which this approval type is associated.

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Clause Usage

Select the Clause Usage tab.

Clause Changes in Doc (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.

Clause Exists in Doc (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.

Establishing Clause Classes

To set up clause classes, use the Clause Class Setup component (CS_CLS_CLASS).

This section discusses how to set up classes.

Page Used to Establish Clause Classes

Page Name	*Definition Name*	*Navigation*	*Usage*
Clause Class	CS_CLS_CLASS	Supplier Contracts, Supplier Contracts Setup, Classes	Set up classes for document clauses.

Setting Up Classes

Access the Clause Class page (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 as well for that clause. This determines the behavior for the clause in terms of its approval process and approval for use. If approvals for particular classes of clauses are not required, leave the Approval Settings grid empty.

Class Name Displays the name of the class. If you are adding a class, the field is required.

Default 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 Type Select an approval type for use with this clause class. The system uses the approval roles and settings that are contained in the approval type definition to control workflow routings. You can't select duplicate approval types.

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Default 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.

Mapping Bind Variables

To set up mappings for bind variables, use the Bind Mapping Setup component (CS_BIND_MAPPING).

To set up source transaction structures, use the Source Transaction Structures Setup component (CS_SRC_TRANS_STRCT).

This section discusses how to:

- Define source transaction structures.
- Map binds.

Pages Used to Map Bind Variables

Page Name	*Definition Name*	*Navigation*	*Usage*
Source Transaction Structures	CS_SRC_TRANS_STRCT	Supplier Contract, Supplier Contracts Setup, Source Transaction Structures	Define source transaction structures.
Bind Mappings	CS_BIND_MAPPING CS_SRC_TRANS_STRCT	Supplier Contract, Supplier Contracts Setup, Bind Mappings	Map binds.

Defining Source Transaction Structures

Access the Source Transaction Structures page (Supplier Contract, Supplier Contracts Setup, Source Transaction Structures).

Use this page to define the hierarchical structure of source transaction structures. 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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Mapping Binds, page 248.

Note. Oracle delivers predefined source transaction structures as system data. Although these are documented here, you cannot change these delivered structures.

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Source Transaction Select the source transaction type for which you want to maintain the base record hierarchy. Values are:

Ad Hoc: This is a general-use source transaction that is not associated with a transactional purchasing contract; however, it does enable the binding of information that is related to the fields that are visible on the Document Management page.

Purchasing Contracts: This source transaction enables you to create contract documents that can reference and include transactional purchasing contract information such as vendor name, maximum amounts, and items on the contract.

*Purchase Orders*This source transaction enables you to create contract documents that can reference and include transactional purchase order information such as vendor name, items and quantities on the PO.

Source Record Enter the core transactional record for each data level to which all views need to be linked when you enter bind mappings.

Level 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.

Parent Record The parent record is the record that the specified source record relates to in the hierarchy. If the source record is at a level greater than zero in the structure, then you must define the correct parent record. This helps to resolve repeating binds during the generation of document elements. If the level is equal to zero, then the parent and source record should be the same, which also helps ensure that document elements are used in the correct parent and child relationship.

Mapping Binds

Access the Bind Mappings page (Supplier Contract, Supplier Contracts Setup, Source Transaction Structures).

Use this page to map bind variables to record views and source records.

Source Transaction Select the source transaction type for which you want to map a bind. Values are:

Ad Hoc: This is a general-use source transaction that is not associated with a transactional purchasing contract.

Purchasing Contracts: This source transaction enables you to create contract documents that can reference and include transactional purchasing contract information such as vendor name and maximum amounts.

*Purchase Orders*This source transaction enables you to create contract documents that can reference and include transactional purchase order information such as vendor name and items.

Record View Select the view from which the system gathers data that it uses to resolve the bind in authored documents.

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Source Record Select a source record. Source records are ones that have been defined as source records within source transaction structures. Only records that are defined as source records are available for selection. The source record is the base record for the record view fields.

Level Displays the level in the source transaction structure at which the source record resides.

Parent Record Displays the parent record that is associated with the source record. This is based on information in the source transaction structures. For example, the contract header record is considered a parent record for contract line records.

Bind Variable Select a bind variable. Only transactional type variables are available for use. The system validates that a bind is not entered for more than one record or view.

Field Name Select a field that the bind variable maps to in the record view. During document generation, the system replaces bind placeholders in document elements with the actual value that corresponds to this field name in the record view.

Display Type Displays a list of display options when the field that you entered is an XLAT field. This enables you to indicate that you want to display the XLAT short name, XLAT long name, or the actual code in the actual contract.

If you are using this bind in a rule criteria, then the criteria always needs to use the code. This field is only for display purposes in an authored document.

Setting Up Wizard Bind Prompt Tables

This section discusses how to define wizard bind prompt tables.

Page Used to Set Up Wizard Bind Prompt Tables

Page Name	*Definition Name*	*Navigation*	*Usage*
Wizard Bind Prompt Tables	CS_PROMPTTBL_DEFN	Supplier Contracts, Supplier Contracts Setup, Wizard Bind Prompt Tables	Define wizard bind prompt tables.

Defining Wizard Bind Prompt Tables

Access the Wizard Bind Prompt Tables page (Supplier Contracts, Supplier Contracts Setup, Wizard Bind Prompt Tables).

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Use this page to define a list of values for use in setting up binds. These are tables that you optionally predefine with values that are assigned to a specific bind and that you can then access when you run the wizard while authoring documents. Prompt tables are primarily used for ad hoc document generation where certain values cannot be easily derived from a source transaction, yet the values exist in the system and you want to provide users 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.

Note. The alternate method to providing a list of values through a prompt table is to use a static list that you specifically define for a wizard variable within a question group.

See Chapter 10, "Using the Contract Document Wizard," Defining Question Values and Navigation Details, page 384.

Prompt tables for bind variables permit records that contain only a single key that is the value on which you want to prompt. You cannot prepopulate higher-level keys, so records with multiple keys are not permitted. If existing records in the database do not meet your needs, contact your system administrator about creating a new view to retrieve required values.

To permanently delete a prompt table, click the Delete button. The system displays a warning message indicating that you will delete the table record.

Prompt Table Select an existing prompt table.

Prompt Fieldname Select a prompt value that you want to use for the wizard bind prompt.

Description 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.

Setting Up Document Configurator Groups and Types

To set up configurator groups, use the Configurator Group component (CS_TEMPLATE_GROUP).

To set up configurator types, use the Configurator Type component (CS_TMPL_TYPE).

This section provides an overview of configurator groups and types and discusses how to:

- Define configurator groups.
- Define configurator types.

Understanding Configurator Groups and Types

Configurator groups and types help you organize document configurator information. While the system does not use the groups and types for validation purposes, you can use them for informational and searching purposes.

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Use configurator groups 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 configurator use. For example, if you have contract documents for a class of items, you can associate the configurators that are used for those documents. You can also group configurators that specify certain contractual requirements. After you define a group, you can add individual configurator IDs to it.

Use configurator types 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 as an information reference for the configurator.

Pages Used to Set Up Document Configurator Groups and Types

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Configurator Group Definition	CS_TEMPLATE_GROUP	Supplier Contracts, Supplier Contracts Setup, Document Configurator Groups	Define configurator groups.
Document Configurator Type Definition	CS_TMPL_TYPE	Supplier Contracts, Supplier Contracts Setup, Document Configurator Types	Define configurator types.

Defining Configurator Groups

Access the Document Configurator Group Definition page (Supplier Contracts, Supplier Contracts Setup, Document Configurator Group).

Use this page to create a group of configurators that you can use in document authoring. Define the group name, and then use the Configurator ID field to select document configurators for the group.

You can also enter the descriptions and any other textual information to further define information for the configurator group. The Description and Short Description fields are required.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Configurator Groups and Types, page 250

Defining Configurator Types

Access the Document Configurator Type Definition page (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 enter detailed information that might, for example, indicate that the document should specify items and pricing on the contract or indicate how delivery orders should be addressed in the document.

The Short Description field is required.

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See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Configurator Groups and Types, page 250

Defining Document Templates and Styles

To set up document templates and styles, use the Document Template and Styles component (CS_WORD_TMPL_SETUP).

This section provides an overview of document templates and discusses how to define document templates and styles.

Understanding Document Templates

Templates are predefined Microsoft Word documents that provide formatting for documents. These templates traditionally determine the basic structure for the document that you use in the creation of documents. A template in Microsoft Word is another Microsoft Word document that uses the extension *.dot.* Templates traditionally have placeholders in which you enter text and use placeholders mainly as starting points for final documents.

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

Note. Microsoft 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.

See Also

Appendix A, "Microsoft Word Integration with Supplier Contract Management," Format and Style Considerations in Microsoft Word, page 710

Appendix A, "Microsoft Word Integration with Supplier Contract Management," Templates, page 711

Appendix A, "Microsoft Word Integration with Supplier Contract Management," Sample Templates, page 712

Page Used to Define Document Templates and Styles

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Document Templates and Styles	CS_WORD_TMPL_SET	Supplier Contracts, Supplier Contracts Setup, Document Templates and Styles	Define document templates and styles.

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Page Name	Definition Name	Navigation	Usage
Search for All Content Instances	CS_CONTENTS_XREF	Supplier Contracts, Supplier Contracts Setup, Document Templates and Styles Click the Where Used link on the Define Document Templates and Styles page.	Search for where a template is used.

Defining Document Templates and Styles

Access the Define Document Templates and Styles page (Supplier Contracts, Supplier Contracts Setup, Document Templates and Styles).

Use this page to upload Microsoft Word templates containing paragraph styles for use with supplier contracts. This page contains all the valid Microsoft Word templates that you can use in setIDs and configurators. The Microsoft Word 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.

Normally bind variables are included in individual clauses and sections; however, you can include certain bind variables in a template to bind transactional information, for example into a Microsoft Word template's header or footer fields, which then repeats on authored pages of a document. If a specific Microsoft Word template contains header or footer bind variables, and the template is associated with a document configurator, ensure that the bind variables are mapped for the same source transaction as the document configurator. For example, if you set up a document configurator for use with an ad hoc source transaction, then you must also map the transactional bind variables that are used in the Microsoft Word 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 provides a message that the bind is unresolved in the document generation log.

See Chapter 9, "Managing the Contract Library," Defining Document Configurators, page 337.

See Appendix A, "Microsoft Word Integration with Supplier Contract Management," Templates, page 711.

Document Style Templates

Upload a File Click to access a page where you can either enter or browse for a location of the template that you want to upload and add to the group of available templates.

Template Name Displays the name of the template after it has been uploaded. This is the name by which the Microsoft Word file is stored in the template folder. After you upload the file, you can change the template name.

View Click to open the corresponding template.

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Styles

Use this grid to list all valid paragraph styles that are defined in Microsoft Word templates that you want to use for PeopleSoft prompting. You must enter these paragraph styles with spelling that matches that of the styles in the Microsoft Word template because the system does not validate against the Microsoft Word template. System prompting for styles is based on this list to reduce the chance of data-entry errors.

Style Name Enter all valid paragraph styles for use within PeopleSoft Supplier Contract Management across all Microsoft Word templates.

Description Enter the description of the style. This should provide further details about how the style appears and its format.

See Also

Chapter 12, "Generating Microsoft Word Documents," page 441

Appendix A, "Microsoft Word Integration with Supplier Contract Management," Format and Style Considerations in Microsoft Word, page 710

Searching for Where a Template is Used

Access the Search for All Content Instances page (click the Where Used link on the Define Document Templates and Styles page).

You use this page to view where the selected template is used throughout the PeopleSoft Supplier Contract Management system. When you click the Where Used link Define Document Templates and Styles page, the system displays the search results using this page. The page displays the content type and content ID in which the template is used. For example, a clause type along with the clause ID.

Click the Description link to view the content type, such as a document configurator, in which the template is used. When you click the field, the system navigates to that document element.

When you click the Where Used link, the system accesses the Search for All Content Instances page where you can search of all uses of the content ID in which the template is used.

An example of using the Where Used search might be when you search for where a standard template is used, the system provides a list for the usage. The list includes a document configurator, you can select the Description link for that configurator to view that configurator. Then, you can select the Where Used link to search for all the documents in which that configurator is used.

Defining Default Settings for Document Formats and Options

To set up default values for document formats and options, use the Configuration component (CS_CONFIG).

This section discusses how to define default settings for document formats and options.

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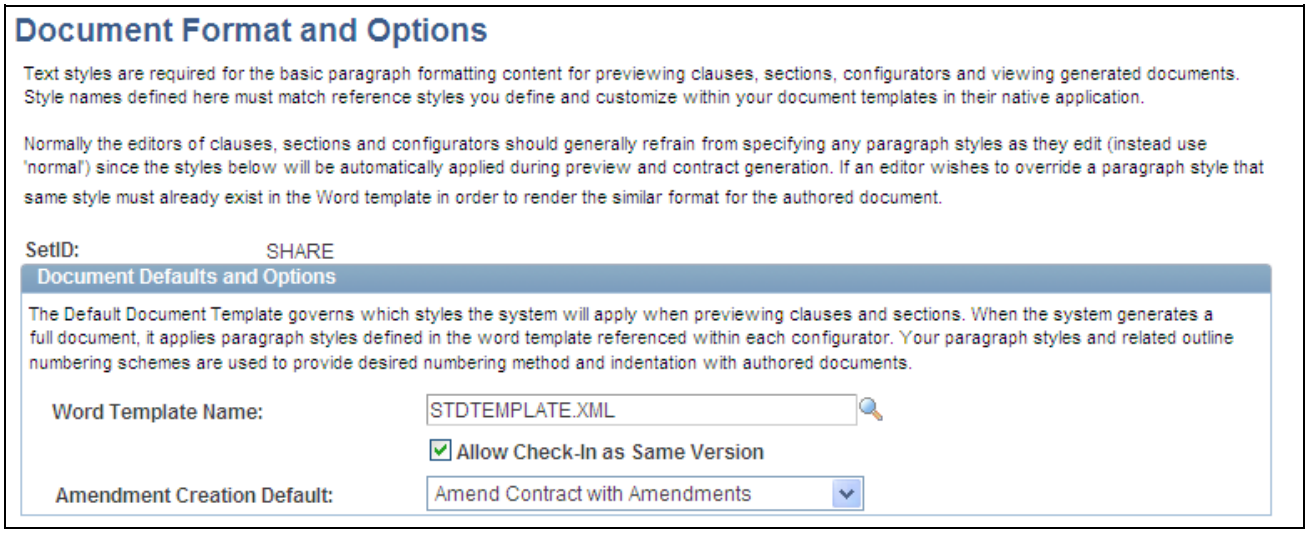
Page Used to Define Default Settings for Document Formats and Options

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Format and Options	CS_CONFIG	Supplier Contracts, Supplier Contracts Setup, Document Format and Options	Define default settings for document formats and options.

Defining Default Settings for Document Formats and Options

Access the Document Format and Options page (Supplier Contracts, Supplier Contracts Setup, Document Format and Options).



Document Format and Options page (1 of 2)

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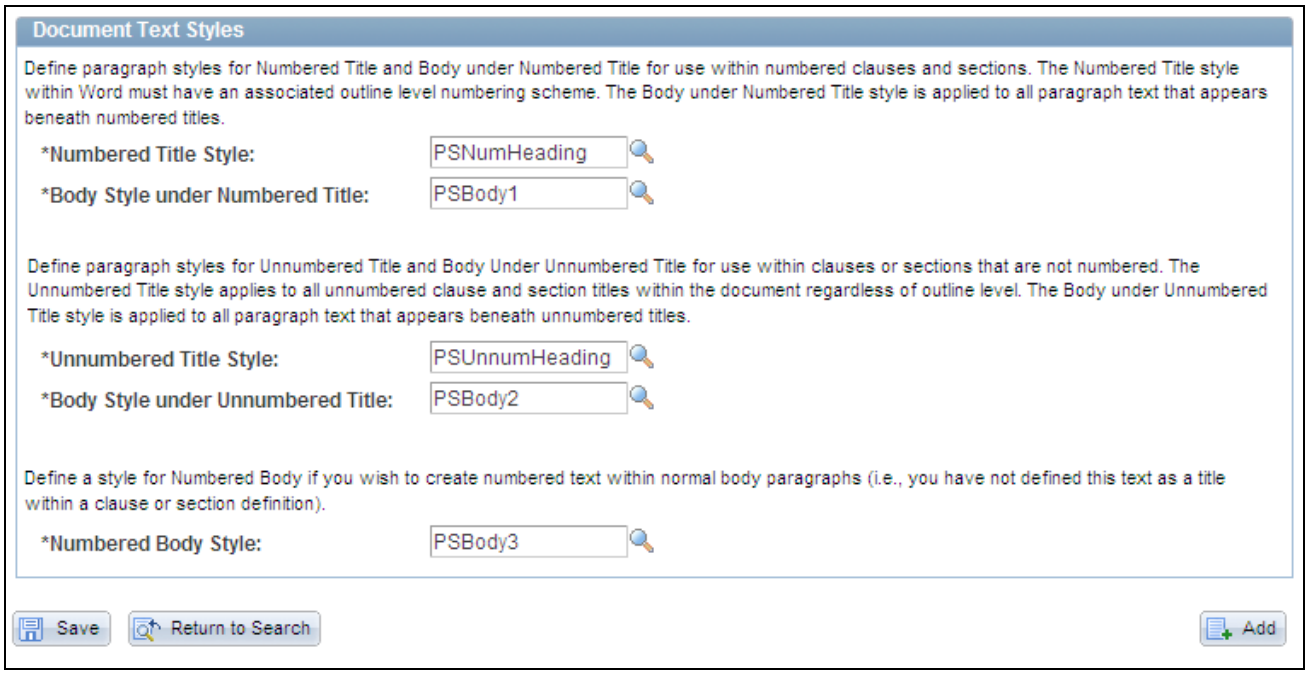

Document Format and Options page (2 of 2)

Use this page to define Microsoft Word templates and paragraph text styles. These paragraph style values control the default formatting and numbering of documents that are created within the selected setID.

Document Defaults and Options

Use this group box to define default values that the system will apply to a document when you apply a Microsoft Word template to a document.

Word Template Name Select a Microsoft Word template to use in the preview mode for clauses and sections within this setID. The available templates are XML versions of word template files *(.dot).* The system also uses the template that you select as the default template to populate the Word Template field when you add a document configurator. You use the default template for clause and section previews and initial document generation and in the configurator structure preview.

Templates that are available for this field are the templates that have been uploaded from Microsoft Word template folders. The templates are uploaded by users. To add more templates, use the Document Templates and Styles feature.

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Allow Check-In as Same Version Select to indicate that you want to enable a document to be checked in at the same version as it was when it was checked out. When this check box is selected, you can leave the document at the same version instead of allowing the system to check it in as an incremental version.

This option is also available when you refresh or re-create a document. You should be careful using these functions because if you do not increment the version number during check in, the system overwrites any previous files (file pointers in history) that use the same version number with this new file.

For history and tracking purposes, you typically use a version change for actions that can affect the contents of the document. However, if you select the Allow Check-In as Same Version check box, the system provides access to only the latest version of the document on the Document History page.

Amendment Creation Default Use this field to define the default setting when you are creating and updating amendments. The system uses the value to process amendments when you are using the Document Management page. You can always override this value when creating the first amendment of a specific document.

Settings include:

Amend Contract Only: Select to process amendments within the original document and do not use a separate amendment file. If you use 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.

Amend Contracts with Amendments: Select to amend the original document, and to create a separate amendment document that is specific for this amendment number. If you select this option, the system creates and maintains two files for checking in and checking out as part of the amendment. The first file is for the last processed document, and the second file is for changes that are made specific only to the amendment. The second amendment file is generated, and you must specify an amendment document configurator for its initial content.

Note. Use the Amend Contracts with Amendments option if you intend to maintain only amendment-related changes in a new version of the originally processed contract.

Select *Amendment Files Only* 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 Amend Contracts with Amendments except that it requires you to maintain only a separate amendment file describing just 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.

See Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," Setting Up System Values for Amendments, page 692.

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.

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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.

To preview clauses and sections, the system always uses the Microsoft Word template name that you specify on this page. To preview document configurators and document generation, the system always uses the Microsoft Word template that is specified on the document configurator that is supplied by default from the setID value. You can select styles for different uses with the template.

Numbered Title Style

Select a paragraph style for use with a Numbered Title style. You use this style with the one in the Body Style under Numbered Title field to define 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 Numbered check box is selected on the Clause Definition or Section Definition pages. The paragraph style within Microsoft Word must have a custom outline-level numbering scheme associated with it to achieve the numbering format that you want in the authored contract when it is generated.

Note. The Level field in the Custom Outlined Numbered list in Microsoft Word corresponds to the Outline Position field in the Content Elements grid on the Document Configurator Definition page. For each element that is assembled for the contract in the authored document, the system applies the correct numbering, indentation, and formats 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.

The system applies the Body under Numbered Title style to paragraph text that appears following numbered titles. This example illustrates the PeopleSoft Numbered Title style using PSNumHeading.

```
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
```

Body Style Under Numbered Title

Select a style that determines how text following numbered titles should appear in documents. The system uses this paragraph style with the Numbered Title style so that as the system generates a document and level indentation occurs, the indented title and body can be specified to align through the paragraph style in Microsoft Word.

In Microsoft Word, this paragraph style normally has a blank Customized Outline Number List associated with it. The style also has the Number and Text positions within the Level in Microsoft Word so that the system generates clause and section body indentations correctly depending on the outline position of the clause and section in the document configurator.

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Unnumbered Title Style Select a paragraph style for use with Unnumbered Title styles. The system uses this value with the Body following the Unnumbered Title style for use within clauses or sections that are not numbered. The system applies this paragraph style when a clause or section is included with a title, and when the Numbered check box is not selected. The Unnumbered Title style applies to all unnumbered clause and section titles within the document regardless of the outline level. The system applies the Body Text following the Unnumbered Title style to paragraph text that follows unnumbered titles. This example illustrates the Unnumbered Title style.

```
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
```

Body Style Under Unnumbered Title Select a style that determines how text following unnumbered titles should appear in documents. Use this paragraph style with the unnumbered title style so that as the system generates and indents a document, the indented title and body is specified to align through the paragraph style in the Microsoft Word document.

In Microsoft Word, this paragraph style normally has a blank Customized Outline Number List associated with it. The style also has the number and text positions within the level in Microsoft Word so that any indentation of the clause or section body is generated correctly depending on its outline position as defined in the document configurator and its content.

Numbered Body Style Define a paragraph style for a numbered body if you want to create numbered text within normal body paragraphs, such as 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 Numbered check box is selected. This example illustrates the Numbered body style.

```
1. Offers can be mailed or hand-delivered, but must be⇒
 physically received by the terms specified. A vendor that⇒
 submits an offer by mail should allow sufficient mail⇒
 handling time.

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.
```

Note. For more information about paragraph styles and custom outline numbered lists, see Microsoft Word documentation.

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See Also

Appendix A, "Microsoft Word Integration with Supplier Contract Management," Styles and Formatting, page 711

Appendix A, "Microsoft Word Integration with Supplier Contract Management," Style Examples, page 717

Setting Up User-Defined Fields

This section provides an overview of user-defined fields and describes how to:

- Define fields.
- Use fields.

Understanding User-Defined Fields

The purpose of user-defined fields is to provide you with a means of defining some additional user-defined attributes to be associated to a document header. When a document is created, you can set up user-defined fields to be enterable directly within Document Management. They can also be captured as part of a wizard response and stored within the Document Management header page as well. PeopleSoft Supplier Contract Management enables you to set up and use these predefined fields to define and search for more specific document information.

When you define a user-defined field, the system makes the field available across a variety of PeopleSoft Supplier Contract Management features in addition to being visible when searching in and using the Document Management component. You can use the fields to search for documents within Verity as a specific database field. For example, if you create a user-defined field for use with a supplier geographic region, then you can use the search dialog to document management to search for those contracts. You can also create a special workflow step within approvals to require special routings based on the fields.

You can use user-defined fields only when document types are enabled at the installation level. 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 using this page, for each document type, you can then 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:

- Four 10-character fields.
- Four 30-character fields.
- Two 60-character fields.
- Five date fields.
- Five eight-integer fields.
- Five decimal fields (Three (23.3) fields and two (11.4) fields).

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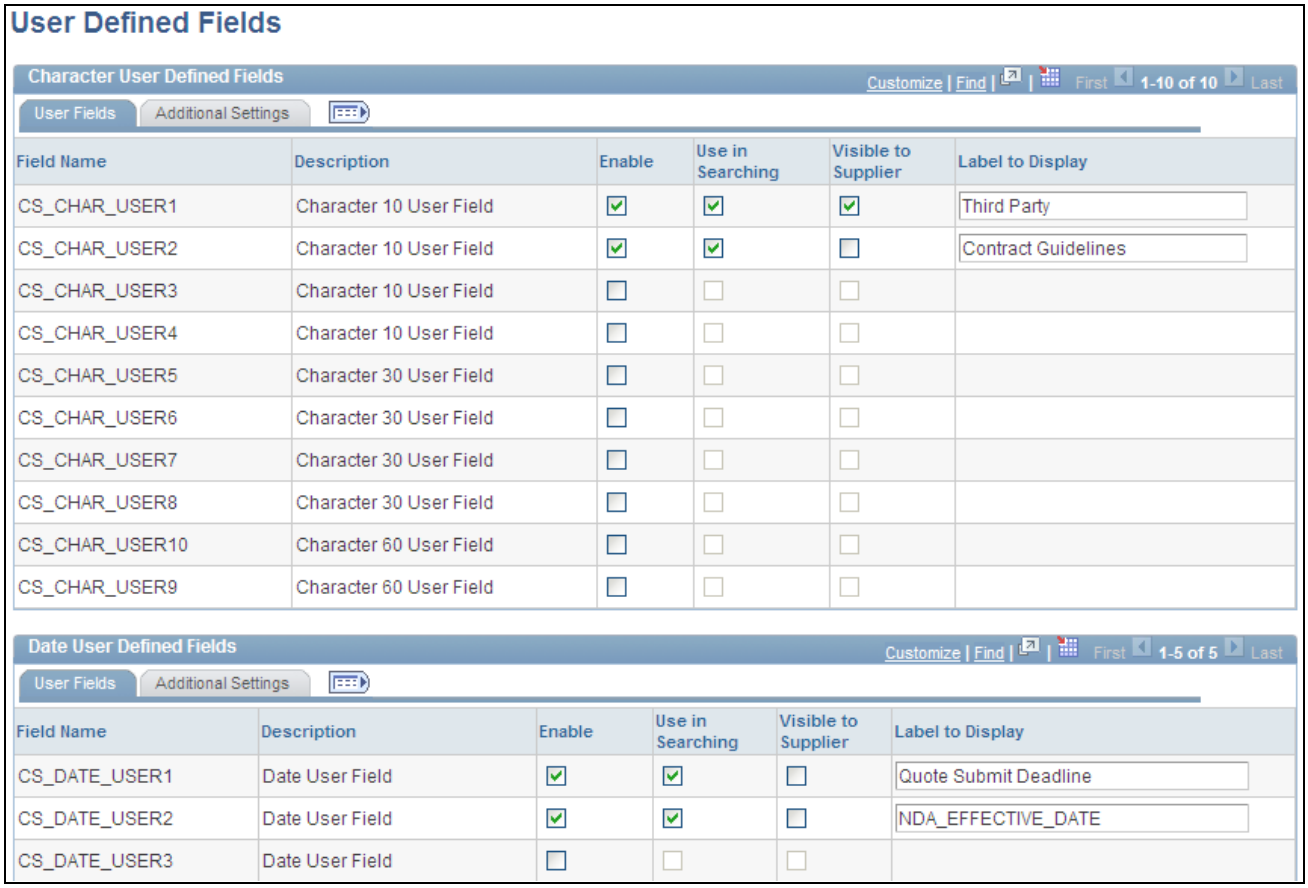
Page Used to Set Up User-Defined Fields

Page Name	*Definition Name*	*Navigation*	*Usage*
User Defined Fields	CS_USER_FLD_SETUP	Supplier Contracts, Supplier Contract Setup, User Defined Fields	Set up user-defined fields.

Setting Up User-Defined Fields

Access the User Defined Fields page (Supplier Contracts, Supplier Contract Setup, User Defined Fields).



User Defined Fields: User Fields tab (1 of 2)

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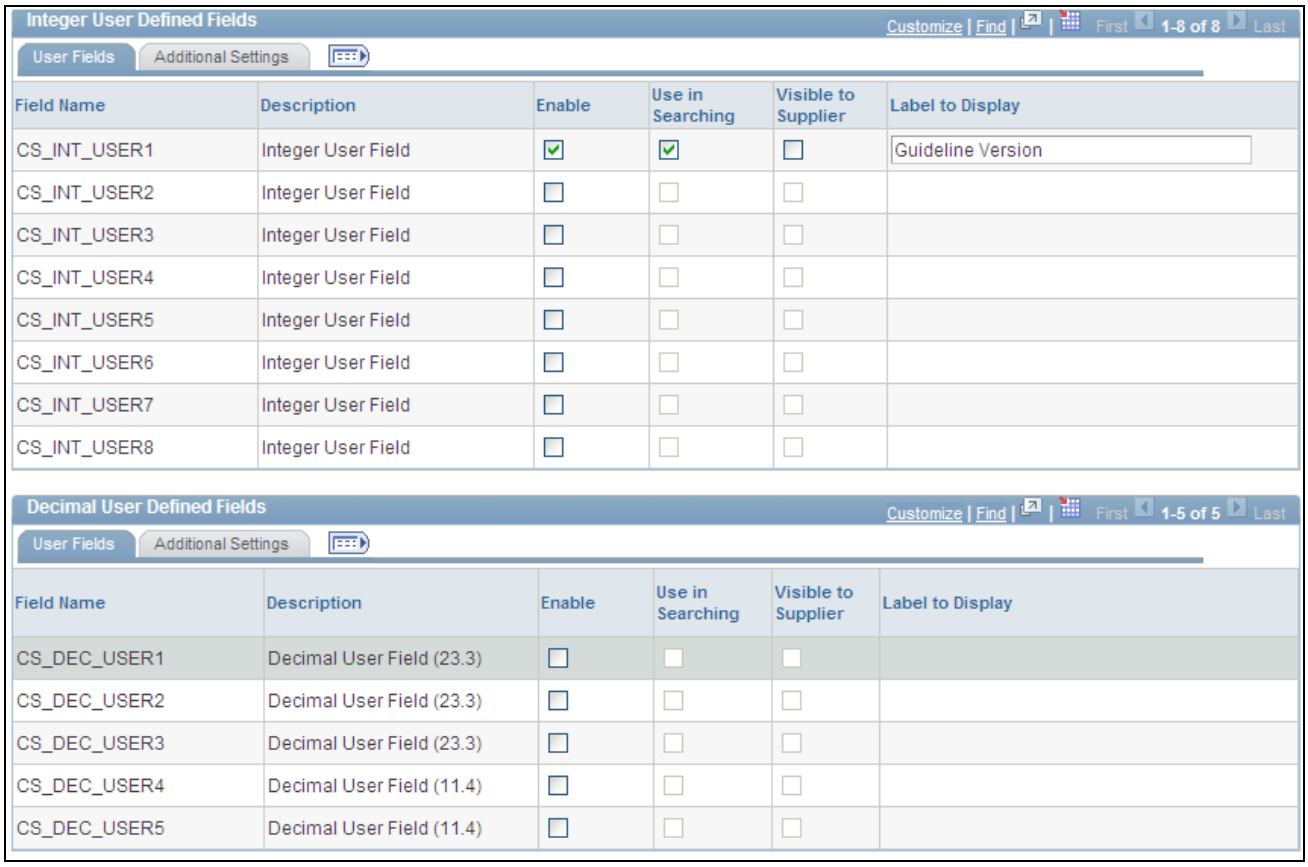

Integer User Defined Fields Customize | Find | First 1-8 of 8 Last

User Fields | Additional Settings

Field Name	Description	Enable	Use in Searching	Visible to Supplier	Label to Display
CS_INT_USER1	Integer User Field	☑	☑	☐	Guideline Version
CS_INT_USER2	Integer User Field	☐	☐	☐	
CS_INT_USER3	Integer User Field	☐	☐	☐	
CS_INT_USER4	Integer User Field	☐	☐	☐	
CS_INT_USER5	Integer User Field	☐	☐	☐	
CS_INT_USER6	Integer User Field	☐	☐	☐	
CS_INT_USER7	Integer User Field	☐	☐	☐	
CS_INT_USER8	Integer User Field	☐	☐	☐	

Decimal User Defined Fields Customize | Find | First 1-5 of 5 Last

User Fields | Additional Settings

Field Name	Description	Enable	Use in Searching	Visible to Supplier	Label to Display
CS_DEC_USER1	Decimal User Field (23.3)	☐	☐	☐	
CS_DEC_USER2	Decimal User Field (23.3)	☐	☐	☐	
CS_DEC_USER3	Decimal User Field (23.3)	☐	☐	☐	
CS_DEC_USER4	Decimal User Field (11.4)	☐	☐	☐	
CS_DEC_USER5	Decimal User Field (11.4)	☐	☐	☐	

User Defined Fields: User Fields tab (2 of 2)

Field Name Displays a system-supplied user field that you can set up with a specific label to use that meets an organization's needs.

Description 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.

Enable 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.

Required Select to indicate that this field is a required field when you are creating documents.

Use in Searching Select to use this field when you are performing document or Verity searches. When user-defined fields are set to be available in searching, the Find an Exiting Document page and Verity Search page include a User Defined Fields section. Using that section, you can limit the search to specific attributes for the field.

Visible to Supplier Select to make this field visible to external supplier users. External users cannot change user-defined field values.

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Label to Display 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

Select the Additional Settings tab.

Set from Wizard Select to extract the value from a contract wizard. This enables you to indicate that the value should come from an answer in the wizard. When you select the Set from Wizard check box, the Bind Variable field becomes available for you to select a bind variable name. When you create, refresh, or re-create the document, the system automatically populates this user-defined field with the wizard answer that corresponds to the bind variable.

When you view a wizard field in the Document Management component, the field is display only, indicating 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 do Verity searches based on a wizard value. Setting selected user-defined values from a wizard can be useful when you want to collect a header-level attribute using a wizard question and also want to store it on the document header for searching, visibility, and for workflow routing purposes.

Bind Variable Select a wizard bind variable that you want to use as the value to populate the field when the wizard is invoked.

Tie to Prompt Table 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 only to fields that are not already set to pull the value from a wizard bind. If you select the check box, you will also need to select a prompt record value.

Prompt Table Select a prompt table for use with this user-defined field. When you select to tie a field to a prompt table, the system provides a list of defined tables from which you can select a value. When you create a document, you can see a Prompt button next to the field to help display the available choices for this field.

Note. Valid prompt tables for this option must contain a single key. This is the field on which you want to prompt. To use this feature in an environment, you might need to have the system administrator create specific views for the environment to provide users the appropriate selection of data.

Defining Automatic Numbering Specifications

This section provides an overview of automatic numbering and discusses how to set automatic numbering details.

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Understanding Automatic Numbering

Automatic numbering applies a system-generated number to new objects as they are entered into the system. You can define automatic numbering specifications for PeopleSoft Supplier Contract Management objects, such as clauses and entire documents. When you use automatic numbering, you define the starting sequence for the object, and as the system processes a new object, it assigns the prefix for the starting sequence, plus the remaining numbering scheme for the ID. PeopleSoft Supplier Contract Management provides system-defined numbering specifications.

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. The record appears in the list of values, but you can select a different starting sequence if it has been defined. Data is stored in AUTO_NUMFLD_TBL and you use the CS_ADHOC_ID field name to define the start sequence.

Using the Auto Numbering page, you can define the default value for the clause ID to NEXT when each clause is parsed from the incoming file and added to the page. As it creates each clause, the system then assigns the next number with the specified sequence to the clause. You need to set up automatic numbering data for each setID that you use for automatic numbering.

Note. Automatic numbering is optional for clause ID, contract ad hoc ID, section ID, contract reporting entity ID, and contract number.

To set up and use automatic numbering:

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

   For example, suppose that you want to 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. So you will:

   a. Select Supplier Contracts, Supplier Contracts Setup, Auto Numbering.

   b. Select the Add a new Value tab.

   c. Select *Contract Sections* in the Number Type field.

      The Auto Numbering page appears.

   d. Select *CS_OBJECT_ID* in the Field Name field.

   e. Complete the numbering details.

      For example, you could name the starting sequence for the number INS for inspections. After completing the details, save the new automatic numbering scheme for contract sections. Then, if you wanted, you could add another starting sequence for a different type of inspection or for general sections. With the numbering details set up, you can now select the default value for automatic numbering and automatically generate numbers for sections.

   f. Select *INS* as the default starting sequence.

      This automatically adds a section with the INS starting sequence when you create a section. If you do not select a default value for the starting sequence, the system uses the last sequence that was added as the default, and automatically selects it when you save the page.

2. Select Supplier Contracts, Manage Contract Library, Sections.

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3. Select the Add a New Value tab.

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

4. Click Add, and enter the section information.

5. Save the section.

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

Page Used to Define Automatic Numbering Specifications

Page Name	*Definition Name*	*Navigation*	*Usage*
Auto Numbering	AUTO_NUM_PNL	Supplier Contracts, Supplier Contract Setup, Auto Numbering	Set automatic numbering details.

Setting Automatic Numbering Details

Access the Auto Numbering page (Supplier Contracts, Supplier Contract Setup, Auto Numbering).

You use the Auto Numbering page to define number types and starting sequences for documents. The system uses the row that is marked as the default value for automatic numbering if document type is selected as an installation option. You can use each start sequence later for one or more document types.

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.

Number Type Displays the number type to which these automatic-numbering details belong. Number types are provided with PeopleSoft Supplier Contract Management and include:

Contract Ad Hoc ID

Contract Clause

Contract Reporting Entity

Contract Section

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Field Name 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:

Contract Ad Hoc ID: CS_ADHOC_ID

Contract Clause: CS_OBJECT_ID

Contract Section: CS_OBJECT_ID

Contract Reporting Entity: REPORT_ENTITY

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.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook* , "Defining Procurement Options," Defining Contract and Vendor Rebate Control Parameters.

Start Seq (start sequence) Enter a prefix using up to three alphanumeric characters. For example, for the CS_ADHOC_ID field, you might want to use a unique prefix of *DOC* for generated documents. When you create the document, the system uses the *NEXT* value as the ad hoc ID, and will automatically number the document DOC with the next available number that is appended to the new ID. This is the number that is used for the last document, plus one.

When you enter fewer than 3 characters, the system automatically adds zeros to complete the start sequence. Then, for example, if you use *2* as the starting sequence, the system updates the field to *200.* As it assigns numbers, the system then increments the new number by one when assigning new numbers. In the example, if the maximum length is five, then a number might eventually appear as 20025, with the first three numbers representing the start sequence.

Max Length (maximum length) Enter a maximum character length for the number. The length cannot exceed the length of the field that appears with the field name.

Last Number Issued 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.

Default Select if you want the system to use a certain sequence as the default value for automatic numbering. You can select only one sequence. If document type is selected in installation options, and no start sequence is specified for a document type, the system uses the sequence that is selected as the default.

Setting Up User Preferences

To set up user preferences, use the PeopleSoft Supplier Contract Management Define User Preferences component (OPR_DEF_TABLE_CS).

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This section provides an overview of user preferences and discusses how to define user preferences.

Understanding User Preferences

User preferences determine the security access and authorizations that users (document administrators and librarians) have when working with authored documents. A document administrator is typically the contract specialist in an organization and is the user doing day-to-day management of documents. Librarians are users who manage and update content in the contract library. This includes clauses, sections, configurators, wizards, and question groups. PeopleSoft Supplier Contract Management provides a sample librarian user role.

Within user preferences, you can define users as document administrators and also grant users access to other administrators' documents, for example, as a supervisor or team member for other administrators. You can also define a document administrator user to have full authorization when needed. In this case, this user has full control of any document in the system when needed.

Users whom you intend to be capable to generate documents of any type must be set up with at least document administrator capabilities. Also, the use of document types should be considered when you are defining user preferences. For example, if you intend to have documents generated only by contract specialists who are using document types for contracts only or who are not using document types, you might want to grant document administrator capabilities to contract specialists only.

On the other hand, if you intend to use document types for generic purposes, such as a generic request-for-contract type for documents that are tied to requisitions, then you need to set up all users whom you intend to permit requesting documents as document administrators, and use the role filter in document type setup to restrict those users to creating just the request.

See Chapter 9, "Managing the Contract Library," Setting Up Document Types, page 354.

In addition to providing user preferences for document administrators and librarians, you use user preferences to define security settings to segregate the duties of approving sections, changing document configurator statuses, and importing documents. These may or may not be the same users as document administrator users.

Page Used to Set Up User Preferences

Page Name	*Definition Name*	*Navigation*	*Usage*
User Preferences	OPR_DEF_TABLE_CS	Supplier Contracts, Supplier Contracts Setup, Define User Preferences Click the Supplier Contract Management link.	Define user preferences by establishing user document authorizations for tasks that users can perform on supplier contract documents.

Defining User Preferences

Access the User Preferences page (Supplier Contracts, Supplier Contracts Setup, Define User Preferences, and click the Supplier Contract Management link).

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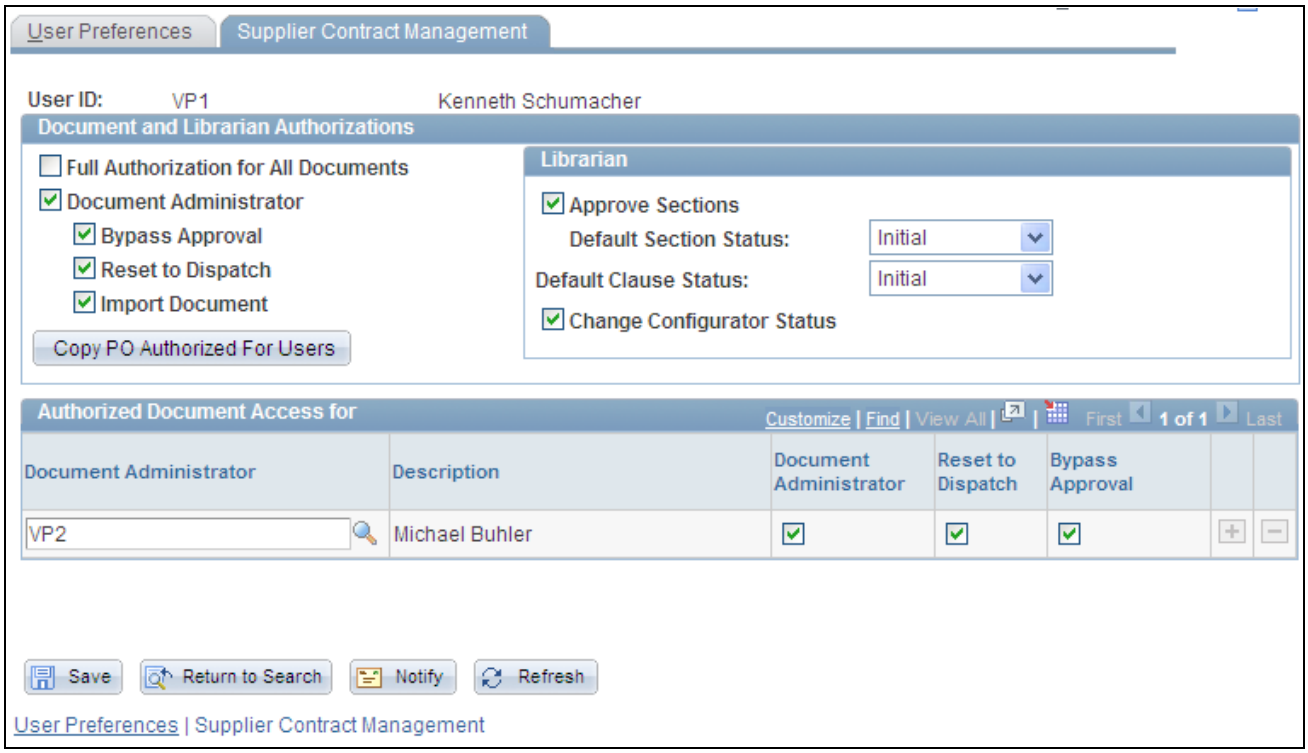

User Preferences page

Use this page to define user authorizations for managing documents through their life cycles and to grant the types of controls that the user who is defined in the User ID field can perform on documents. This is the selected user for this page discussion. This user preference page is enabled only for users who have administration rights for authored contracts. Those users can approve library sections and set configurator status.

The application administrator completes the setup information for user preferences for any document administrator.

Document and Librarian Authorizations

The application administrator uses this group box to grant security for document administrators and librarians who will manage section approvals and status changes for configurators and who import documents.

Full Authorization for All Documents Select to grant a user the authority to perform all tasks that are listed on this page. This user has full authority for all documents in the system, and is considered a super user with access to perform all actions on contracts that are in the system. When you select the check box, the system disables the remaining fields and check boxes and they cannot be changed. If you do not select to fully authorize the user for all documents, then you can select individual authorizations for document tasks.

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Document Administrator Select to indicate that the user has document administrator authority to perform selected document tasks. 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 grid.

Document administrators can also control life cycles for contracts for authors by submitting contracts for collaboration and approvals. Depending on how you are using document types, document administrators might include only contract specialists or maybe a broader list of users for self-generating documents.

Bypass Approval Select to indicate that the user can set a document to bypass approvals. This means that the document can be automatically set to approved by this administrator. Normally, approved steps are required, but when necessary, the user can expedite the document. When users have the authority to push a document through its approvals, the Bypass Approval button appears on the Document Management page.

Reset to Dispatch Select to indicate that the user can reset a document to a Dispatched status. After a document has been completed between a supplier and customer, it is in an Executed status. At that status, the Reset to Dispatch button is available on the Document Management page. This feature is useful if you want to do minor changes, such as correct typographical errors, in the current version of the document without processing an amendment.

Import Document Select to provide this document administrator with permission to import a document. Document administrators with this permission have access to the Import Document button on the Add Document and Create Document pages, which enables them to load legacy external documents into the system as an alternative to generating them from a document configurator.

Copy PO Authorized for Users(copy purchase order authorized for user) Click to copy buyer IDs from the Purchase Order Authorization or Buyers User Authorization grid to the Authorized Document Access grid. These IDs belong to users who are authorized to perform purchase order tasks for the current user.

This button is available when the Full Authorization for All Documents check box is deselected and the Purchase Order check box is selected as a valid transaction source on the Installation Options page.

When you click the Copy PO Authorized for Users button, the system checks for users who are defined in the Buyers User Authorization grid for the user whose preferences you are defining. If user IDs exist in the grid, the system copies those user IDs to the Authorized Document Access for grid box. After the user IDs are copied, you can select the authorization access that you want to provide the users.

Librarian

Use this grid box to set default values for clause librarians. You can set the default approval for sections and clauses and whether the librarian can change the status of a document configurator. The default values apply to the user ID that you select.

Approve Sections Select to indicate that a librarian can mark a section as approved, making the section available for use in documents. Section statuses can be changed or set to Approved on the Section Definition page.

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Default Section Status Select the default value for the status when this librarian creates a new section. This saves time in submitting the section for approval. Values include *Approved* and *Initial.* This field is available when the Approve Sections check box has been selected.

When this value is set to *Approved,* and the librarian checks out an approved section and makes changes, the system does not set the status back to *Initial.* Rather, it leaves it as *Approved.*

Default Clause Status Select the default value for the status when this librarian creates a new clause. This saves time when librarians are not using clause approvals by allowing certain librarians to set clauses as approved by default. Values include *Approved* and *Initial.*

This field is not available when the Clause Approval option is selected on the Installation Options page. In this case, the default value is *Initial* because all clauses must be submitted for approval.

When this value is set to *Approved,* and the librarian checks out an approved clause and makes changes, the system does not set the status back to *Initial.* Rather, it leaves it as *Approved.*

Change Configurator Status Select to indicate that the user can update the status of a document configurator. Configurator statuses can be changed on the Configurator Definition page.

Authorize Document Access for

Use this grid area to define additional authorizations for the person with the selected user ID. These authorizations enable this user to act on behalf of other users who are selected in the Document Administrator column of the grid. You might use this feature, for example, if the selected user is a senior contract administrator. While members of his department or group are away from the office, the user has the authority to perform tasks for his or her documents.

Note. You can also copy user IDs from the Purchase Order Authorizations page to populate this grid. Click the Copy PO Authorized for Users check box to copy the user IDs.

Document Administrator (column) Select additional users for whom the selected user will have authority to perform document tasks. Use the corresponding check boxes to define the authorities for the selected user.

Document Administrator (check box) Select to indicate that the selected user has document administrator authority for the corresponding user's documents. This means that the selected user can generate and edit the user's documents just as if he or she were the administrator.

Reset to Dispatch Select to indicate that the selected user has authority to reset a processed document back to dispatch for the corresponding user. This authority is in addition to any other task authorities that you select in this grid.

Bypass Approval Select to indicate that the selected user has authority to bypass approvals and expedite a document for the corresponding user. This authority is in addition to any other task authorities that you select in this grid.

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Chapter 9

Managing the Contract Library

This chapter provides overviews of the contract library, document clauses, document sections, document rules, bind variables, document configurators, contract wizards, document types, and contract library searches and discusses how to:

- Define contract clauses.
- Define contract sections.
- Set up contract rules.
- Define bind definitions.
- Define document configurators.
- Set up document types.

Understanding the Contract Library

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

Common Elements Used in This Chapter

Approval Status Approval status represents the availability of content, including the clause, section, or rule for use in a generated document. If approvals have been enabled through installation options, then the system requires that clauses go through a more formal approval workflow process. You manually approve sections and rules. 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 Approved, a status of Active, and effective date equal to or prior to the begin date of the transactional or ad hoc contract.

Cancel Check Out Click to cancel the checkout of a document. This button is available when a clause, section, or document has been checked out for editing. The system does not save any updates that have been made to the document and resets the document back to the version that it was at when it was checked out. The Cancel Check Out button is available only to the user who checked out the document.

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Collapse Full Text Click to reduce the amount of text that appears in the Full Text field. This button is available after you expand the Full Text field.

Delete 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.

Edit Document Click to open a Microsoft Word document that is associated with a clause or section. The system checks out the document for you to edit. Click the Check In button to upload the document after you make the changes and save the document. You can also cancel the editing session by clicking the Cancel Checkout button.

You can create Microsoft Word documents using the Clause Definition and Section Definition pages. When you enter text in the Title and Full Text fields and save the element, the system automatically generates the Microsoft Word document in WordML code. You can also edit the document before you enter the title or full text information. When you check in the document, the system populates the fields from the Microsoft Word document.

If you make changes to 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 Internet Architecture page, the system removes any Microsoft Word formatting. You can click the Yes button to continue with the edit in the PeopleSoft Supplier Contract Management system or click Cancel to save the Microsoft Word formatting.

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Effective Date

Select a date for which this document element becomes effective. Effective dates are key values for uniquely identifying the current or future effective-dated section, rule, clause, or document that is submitted for approval.

During document generation, the current effective-dated version of an element definition might be active, but not approved. In this case, the system searches for a previous effective-dated table row that is approved to include in the generated document. Document generation always uses the begin date of the contract to determine which effective-dated rows of sections, clauses, dependent clauses, and rules to include. The system provides a warning when situations in which a clause has been designated for inclusion in the contract based on effective date, but the clause has not been approved. Warnings can appear in the generation log of the Document Management page.

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.

Exceptions to how the system reevaluates effective dates when refreshing documents include

- When a rule was false and is now true.

  In this case, the system includes new clauses from the library.

- When a bind value changes anywhere in a repeating section.

  In this case, the system re-creates the entire section in the document.

In both of these cases, the system uses any changes to the library in document generation.

See Chapter 13, "Managing Document Life Cycles," Refreshing and Re-creating Documents, page 514.

Expand Full Text

Click to view a larger portion of the text that is contained in the Full Text field. Use the Collapse Full Text button to return to the normal view. You can edit clauses and sections using the Full Text field.

Preview Document

Click to open Microsoft Word preview files of a clause, section, or configurator. Preview applies the Microsoft Word template and paragraph styles to provide you an approximation of how a final generated document will appear. The document is intended for read-only purposes and cannot be checked in when you use the Preview Document button. After closing the document, you do not have to initiate any other action to end the preview session.

Microsoft Word 2003 integration enables formatted content, so you can preview the document in the same way that you would use the View feature in Microsoft Word.

Spell Check

Click to initiate the Spell Check feature for entries in clause and section titles and full text. You can also use check spelling by-reference text in clauses. If the spell checker doesn't find a word that it questions, the system displays a message that no misspellings were found.

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Status Represents a state for a clause, section, or rule. Active or inactive states are pertinent to the effective date of the object.

Select *Active* to indicate that the element is ready for use, or select *Inactive* to remove the element from consideration for use in the structure.

This status is not the same type of status as the approval status. Approval statuses relate to the document review cycle. You can manually control the approval for clauses and sections. The Approval Framework can control the approvals of clauses and documents.

Typically, the status is *Active* for all content that is not activated in the system. The approval status (versus this status) controls the approval settings and use of content in generated documents. However, if you need to completely inactivate a clause or section, or make it temporarily unavailable, you can use this status to do so by setting to *Inactive.*

Title Enter the title to use for this clause or section. The title serves as a heading for the document element. This is a required field and appears on the created document with the title format.

Where Used Click to perform a search on where this object is used in PeopleSoft Supplier Contract Management. When you click the link, you access the Search for All Content Instances page, where you can enter additional search criteria for the object. Where-used capability often enables you to traverse the system. For example, from a bind, you can find all clauses that use it. Or you can find sections that use a clause, configurators that use a section, and documents that use a configurator.

See Chapter 14, "Searching for Library and Document Contents," Searching for Library and Document Contents, page 602.

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 the reusable building block components for the authoring system. Using the library, you can create reusable rules, clauses, and section elements. These elements are the building blocks for a document configurator which, in turn, you can use to generate a Microsoft Word document. Similar to clauses, sections, and rules, you can reuse document configurators. Documents resulting from a configurator can have different structures based on the data that they contain.

The contract library and document management system bring together transaction information, such as purchase order lines, with the PeopleSoft Supplier Contract Management-generated document. 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.

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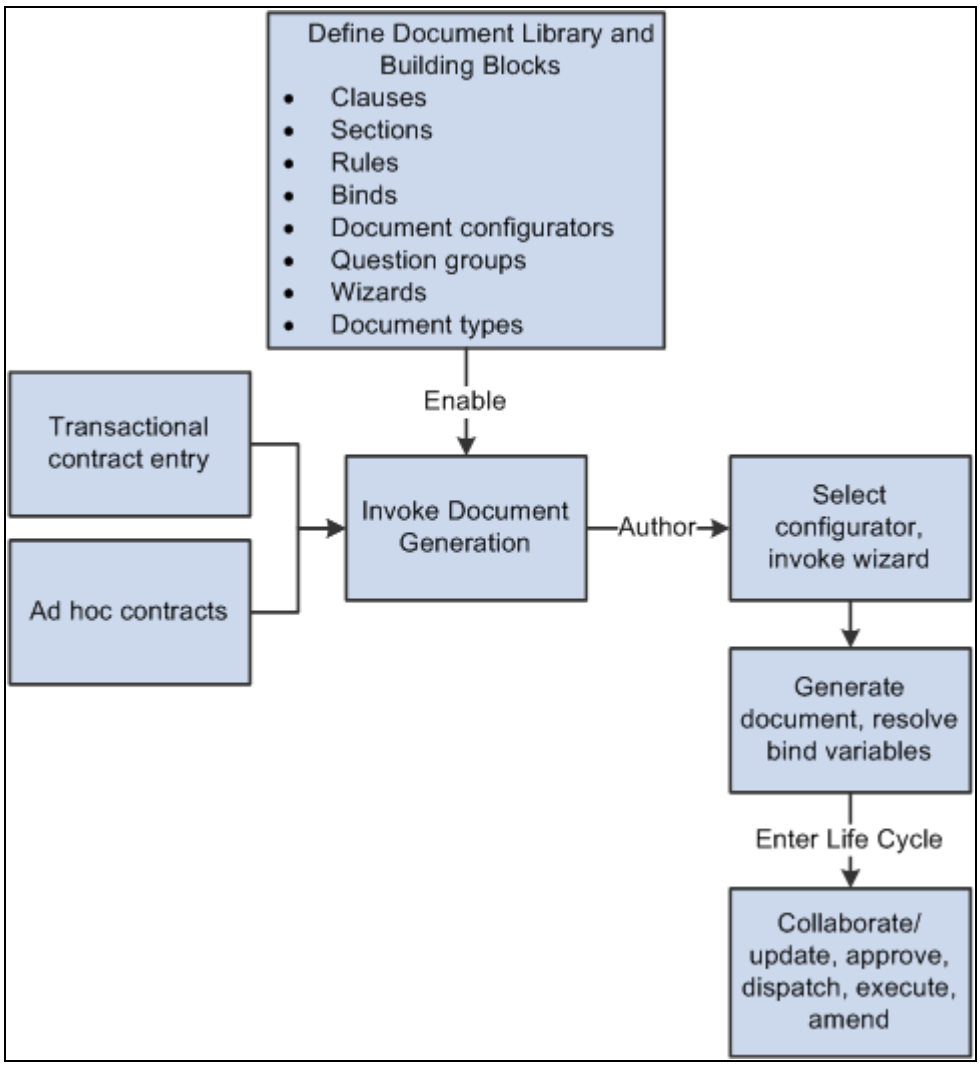
Along with the capability to import clauses, the library also provides a complete set of searchable contract elements. Among the types of searches that you can perform within PeopleSoft Supplier Contract Management are searches for clauses, sections, rules, document types, and bind variables. You can 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 resulting list that meets the search criteria.

This flowchart illustrates the elements of the contract library and how the system processes a purchasing contract or ad hoc document from defining building blocks in the library to generating the document to maintaining the document through its life cycle:



Contract library components and document creation process flow for supplier contract documents

The building blocks that appear in the upper section of this flowchart are the elements that are described in this chapter. The document authoring system uses these elements 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, which is described in the next chapter.

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Understanding Document Clauses

This section discusses:

- Clauses.
- Effective dating.
- Clause status, approval status, and workflow.
- Clause text editing.
- Bind variables and repeating clauses.
- Using tables in clauses.
- Dependent clauses.
- Alternate clauses.
- Clause previews.
- Clause imports.

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 type of clauses. The general clause is for normal document use. This section 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 Chapter 9, "Managing the Contract Library," Using Tables in Clauses, page 280.

When you are using general clauses:

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- You cannot attach a table clause as a dependent clause.

  Table clauses do not appear in clause lists of values.

- 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.

See Also

Chapter 9, "Managing the Contract Library," Defining Clause Information, page 309

Effective Dating

Clauses are effective-dated so that the system can keep a history of clause text updates and approval cycles. Effective dating also enables you to make changes to existing clauses for future use without affecting the wording of the current clause, which might be in use in documents. When creating a contract library, you should define the starting effective dates. The system uses these start dates of the contract to determine which valid clauses to include.

Note. Clause librarians should include the Correct History option in rows of history in clause maintenance, especially when new effective-dated changes are commonly added as of today.

Clause Status, Approval Status, and Workflow

Clauses have several statuses associated with them. The first is the status for the clause itself and the next is the approval status for the clause. Because clauses are effective-dated, the clause status is typically Active even for clauses that are pending approval. You can manually set a clause status to Inactive to phase out a particular clause.

You use the clause approval status to determine whether a new clause or change to an existing clause for this specific effective date is approved for use. When you add a new clause or change a clause, the system sets the clause status to Active and sets the approval status to Initial. You can submit clauses for approval through the Approval Framework or perform approvals manually, depending on the installation options and user preferences. If you do not set up clauses for approval workflow using installation options, then users with access to the clause page can manually set the clause approval status.

Clause librarians with clause approval permissions can have their newly copied, created, or edited clauses automatically set to approved. 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 sets the clause to an initial status, regardless of user preference settings.

See Chapter 17, "Approving Documents and Document Components," Approving Clauses, page 651.

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Clause Text Editing

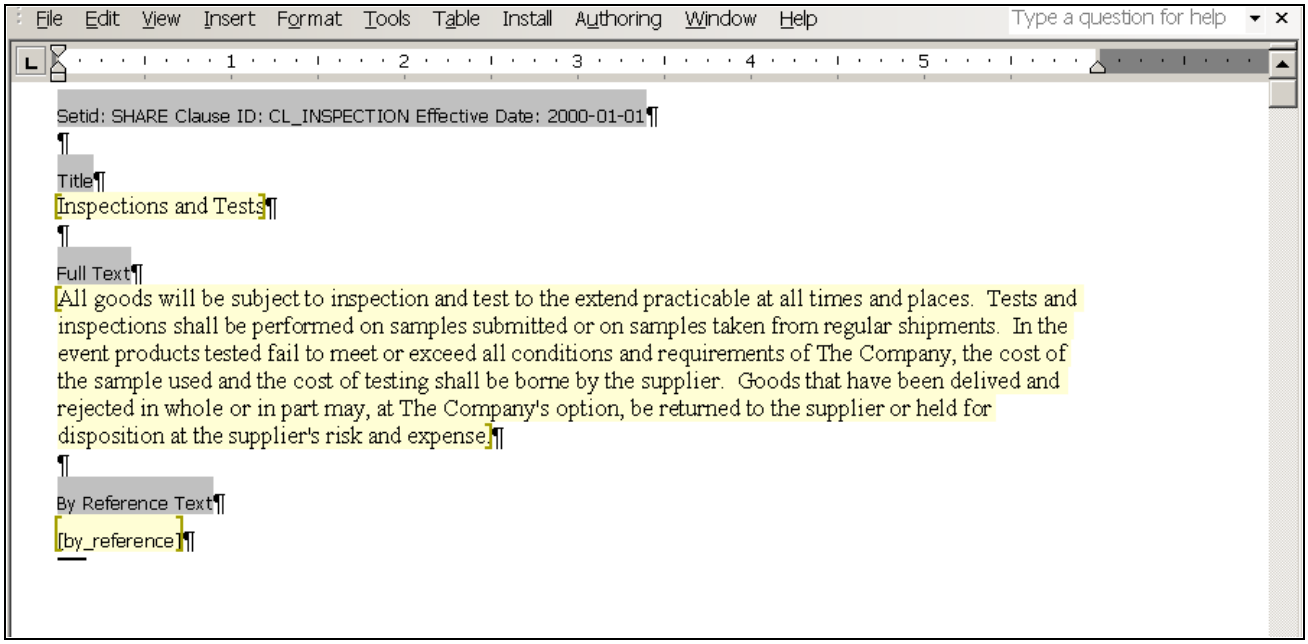
Clause text fields can include user-defined text and bind variables. You use the Clause Definition page in PeopleSoft Supplier Contract Management to insert these elements directly into the clause using plain text. Plain text does not support formatting. You can also use the page to open the clause in Microsoft Word for editing for rich-text formatting.

Note. When you define simple clauses, Microsoft Word editing is not necessary because the system applies basic paragraph styles from the Microsoft Word template that have been set up using the Document Format and Options page. This setup can apply basic formatting, such as body and numbering styles, using a consistent method for the entire contract. If you need to apply special character-based formatting such as making text bold, underlining text, italicizing a specific sentence or word, or applying other rich-text formatting, you can edit the clause directly using Microsoft Word.

Additional considerations for formatting text within Microsoft Word so that it renders correctly using the preview feature and the final assembled document are described later in this book.

See Appendix A, "Microsoft Word Integration with Supplier Contract Management," page 701.

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 Internet Architecture page for Microsoft Word maintenance. Only the clause content is available for editing.



Microsoft Word example of how a clause appears during editing

When you open a document using Microsoft Word, the system includes information about the clause. This information appears with instructional components in a gray background in the document and the system displays 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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Microsoft Word XML Formatting

When the system generates the Microsoft Word document, the document's storage format is in XML instead of a Microsoft Word .doc template. You can also view the custom XML tags for the Microsoft Word document using a task pane in the document. You can view custom tags using Microsoft Word. To view custom tags:

1. Select View from the toolbar.
2. Select Task Pane.
3. Click the Other Task Panes down arrow and select XML Structure.

The system displays the XML tags for the clause document.

Clauses contain titles, body, and by-reference text, which the system converts into Microsoft WordML when it creates a document. WordML is a Microsoft tool for use with XML language.

See Also

Appendix A, "Microsoft Word Integration with Supplier Contract Management," XML Schema, page 704

Appendix A, "Microsoft Word Integration with Supplier Contract Management," page 701

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.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Mapping Bind Variables, page 247.

Bind variables can be wizard or transactional types. Wizard binds are user-defined variables that you create. Transactional binds are those that you use in clauses that are linked to purchasing contract transactions. Transaction bind variables enable you to map values from the transactional data such as a purchasing contract into the authored contract. For example, referencing bind variable %%CONTRACT_ID%% can map the transactional contract number from the purchasing contract into a title clause when the system generates the contract.

Bind variables also have repeating attributes associated with them that, in turn, 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 bind variable %%ITEM_DESCR%% 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. So you could define a clause having the text:

This inspection process applies to %%ITEM_DESCR%%.

When the system includes this clause for generation against a purchasing contract with three lines, it could appear as follows in the generated document:

```
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.
```

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You can nest the repeating-level clauses and sections as well. For example, a dependent clause could be assigned to an existing parent clause that repeats level two data, such as contract milestones data. This is a child record to the procurement transaction contract line in the parent clause. When nesting repeat structures, the system validates that it 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 purchasing contracts. Wizard binds are less complex and do not use repeating structures, so they are always at a level zero. You can easily create wizard binds.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Mapping Bind Variables, page 247.

A clause can stand alone or be used as a dependent or alternate clause. These are clauses that you can associate with another clause or use instead of another clause. Descriptions of these clauses are in the next sections.

Using Tables in Clauses

You can define a clause for use with Microsoft Word tables. Table clauses enable you to create a table using Microsoft Word and then populate the table with transactional information during document generation. Table clauses also enable the summing of columns in the table using a SUM pseudo bind format. So, as 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 $$ symbols before and after the bind instead of the regular %% bind symbols. 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 the system uses the pseudo bind construction with a nonnumeric bind, it treats the bind as regular text and doesn't perform SUM processing.

You can use other clause features including a title and clause text both 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 also:

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

  You use the Edit Document button to access the Microsoft Word document and to create the table. This enables the available Microsoft Word formatting.

- 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 preceding 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 as it was formatted in the Microsoft Word document.

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- 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 doesn't 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 that purchase order line. If you want to see this sum, you do not need to use a pseudo bind, instead you can use this system provided bind. You can find these binds by accessing the Bind Mappings page.

- Suppress repeated key information.

  Using fields on the Clause Definition page, you can limit the duplicate key values in a table. This is useful when redundant information, such as item ID and item description, is being presented across different lines in a table.

  See Chapter 9, "Managing the Contract Library," Table Clause Examples, page 282.

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

Steps for Creating Table Clauses

You use these steps to create a clause table:

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 during document creation. 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 for 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. Also, when you save the table clause, the system validates the clause and provide error messages.

3. Click the Edit Document button to access the Microsoft Word version of the document.

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4. Make any document edits and insert a table in the document.

   Before you can use the document, 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 within it. For example, you would create a Microsoft Word table with one row within it having the Item ID, Description, and other needed information at that level for the item. During document creation, the system expands this row to include all items included (repeated) that come from the transactional contract. You can also edit the clause title and place text before and after the table.

5. Save the document and check it in to the clause library.

After establishing the clause values, you can use the clause in a contract document. When you generate the document, the system retrieves the transactional information from the purchase order or purchasing contract and applies the values and summations that you defined in the clause.

Table Clause Examples

When you define table clauses and if you want to, you can use the $$ tag multiple times to enclose summation values. The next example illustrates how bind variables might 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%%
TOTALS	$$SHIP$$		$$QTY$$	$$PRC$$	$$AMT$$	$$TAX$$	$$FRT$$	$$SCHSUM$$

Microsoft Word tagging setup for table clauses

Several considerations for defining table clauses in Microsoft Word include:

- 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.

The next example illustrates how a table clause might 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
TOTALS			142.000		2300.00	161	32.00	2493.00

Microsoft Word table clause example

The table illustrates how you would use the Suppress Duplicate Keys check box and 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 theSuppress Duplicate Keys check box and entering *3* in Last Key Field Column field. Starting with the Due Date column, table values are not suppressed.

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When you define the table, you can bold fields such as the Totals row in the example. 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. Table amounts do not line up by decimal points. You can right justify the column 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 with validating a table clause, the system displays many of the errors above the Title field when you save the clause. 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, the system displays an error.
- When you create a table clause and you enter reference text, the system displays an error.
- When you attach a table clause to a rule, the system displays an error.
- 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.

See Also

Chapter 9, "Managing the Contract Library," Defining Clause Information, page 309

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 also uses the dependent clauses that are linked to the parent clause. Any time the system uses a main clause, the dependent clauses appear directly below it in the Microsoft Word document. You can use dependent clauses when they are defined independently, but they are always mandatory when you link them to a parent clause.

You create a dependent clause in the same way that you create any clause. A clause becomes dependent only when you associate it as a dependent clause using the Dependents grid on the Clause Definition page.

To associate a dependent clause with a parent clause, the dependent clause must be effective on or before the parent clause's effective date. This enables you to change the parent clause content and structure over time and include different structures and content based on contract start date.

Dependent clauses are approved separately from parent clauses, but their approval statuses appear on the Clause Definition page. When you are developing a parent clause, this visibility to dependent clauses assists in the approval of the parent clause.

See Chapter 9, "Managing the Contract Library," Defining Dependent Clauses, page 318.

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Alternate Clauses

You use an alternate clause as a substitute for a parent clause. Similar to a dependent clause, you create an alternate clause in the same way that you create the parent clause. The clause becomes an alternate clause when you assign it as an alternate to another clause. Alternate clauses enable you to specify clauses that can be selected manually as an alternate clause using Research task pane integration with Microsoft Word 2003.

In addition, the system can automatically include alternate clauses based on rules that you set up in the system and associate with the alternate clause. For example, you might have two standard address clauses used in an ad hoc contract. One address clause uses two lines while the other uses three lines. Then, depending on document author responses to wizard questions, the system determines whether the author wants to use the two-line or three-line clause for formatting. You can define the three-line formatted clause as the default clause, but based on wizard responses, the system can collect address-line values during contract generation, find a rule to recognize the wizard response for a two-line clause and, in turn, switch the three-line clause to the two-line clause automatically in the document.

Another example of switching to alternate clauses might include working with specific suppliers. In this case, for an ad hoc document, a wizard response could determine the supplier based on the alternate rule. In the case of a transactional contract, the supplier value might come from a transactional 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 it adds the clause to the document configurator, it does not use the alternate clause during document generation.
- When you use Microsoft Word Task Pane functions to search for clauses, the system lists the alternate clauses and enables them for author selection.

When you use an alternate clause, the system uses only dependent clauses that are assigned to the alternate and not the dependent clauses that are assigned to the main clause. Alternate clauses can include bind variables, but cannot be repeating in nature. This means that they cannot contain bind variables that repeat.

See Chapter 9, "Managing the Contract Library," Bind Variables and Repeating Clauses, page 279.

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

See Also

Appendix A, "Microsoft Word Integration with Supplier Contract Management," page 701

Chapter 9, "Managing the Contract Library," Defining Dependent Clauses, page 318

Clause Previews

During document preview and generation, the system uses the Microsoft Word template and setup definitions to determine which paragraph style and outline numbering to associate with the clauses in a generated document while preserving special character formatting such as making characters bold or underlining a word.

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

Clause Imports

Using the Import Clause feature, you can import a single clause or group of clauses into the contract library. The system provides for completing a partial clause definition and applies the same edits to clause entry as are present in the online entry.

See Chapter 11, "Importing Clauses, Sections, and Documents," Importing Clauses and Sections, page 399.

Understanding Document Sections

You use a document section to create a reusable structure of clauses, rules, and sections that can be nested up to nine indented outline levels and to create rules for use within a document.

Note. You can also use a special Amendment Placeholder section type when creating contract amendments. The system uses the placeholder section as a location in the amendment configurator to record text additions, updates, and deletions that you have made in the main amended document. During system processing, these changes can be automatically extracted and placed in a separate amendment file at the location where the Amendment Placeholder section is defined in the amendment configurator. A given amendment configurator should contain only one Amendment Placeholder section at most.

See Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," Updating Amendment Files Automatically, page 697.

The next sections describe section features.

Effective Dating

Sections are effective-dated so that you can make future changes to sections without affecting existing section structures that might already be in use in 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 at a point in time 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. You maintain approvals for sections using the Section Definition page. Use the User Preferences page for PeopleSoft Supplier Contract Management to define who can approve sections. You can set user preferences for clause librarians so that the sections they create are automatically set to an approved status.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up User Preferences, page 266.

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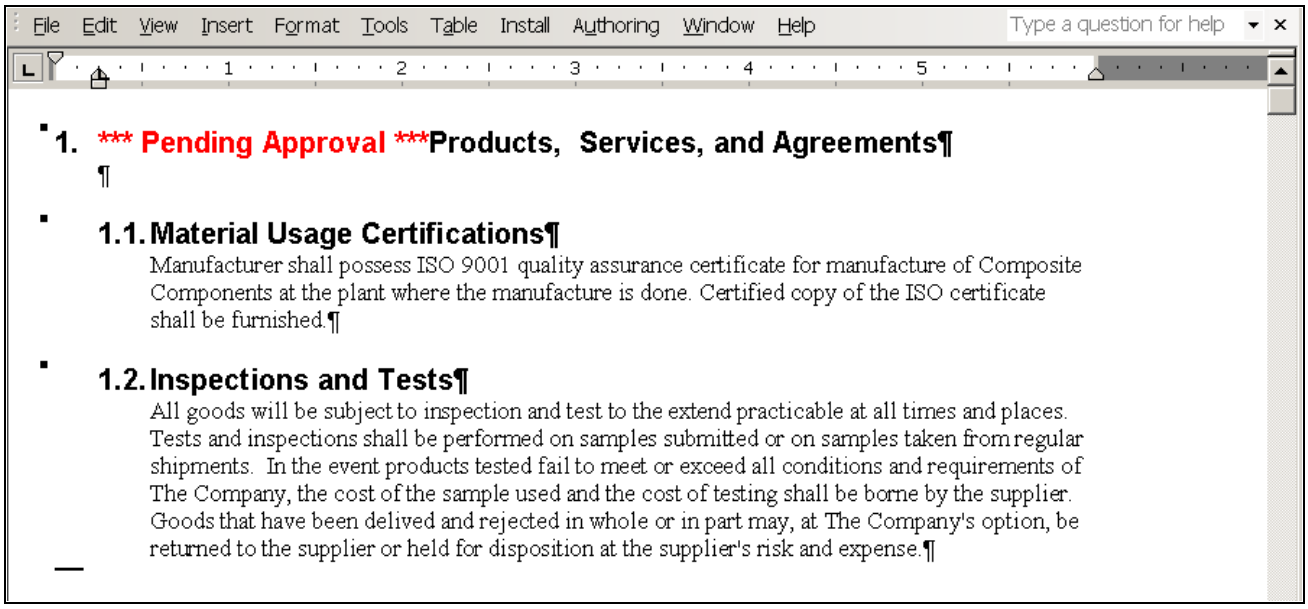
Section Text Edits

Sections can contain a title and section body, for example, that you can use as an introduction to the document section. The editing functions for a section are similar to those for clauses in that you can edit text directly using the PeopleSoft page, or use Microsoft Word 2003 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 word processing program but is expected to be edited in another word processing program. With the document authoring system, you use the format between Microsoft Word and the PeopleSoft system.

The following example illustrates how a simple section might appear when you preview it in Microsoft Word. Although sections do not have a formal workflow status, if the section status is not set to Approved, the Microsoft Word document indicates the status in the section title when you are previewing the section. If you were to include a pending section in a document configurator, the unapproved section would be omitted from any final generated document.



Microsoft Word preview of a section

The previous example illustrates a section that is pending approval. The system generates a message within the section to indicate that it has not been approved. Sections do not use alternates or groups. The section structure can include clauses, other sections, and rules, whereas a clause can have only dependent clauses associated with it.

During document preview and generation, the system uses the Microsoft Word template and setup definitions to determine which paragraph style and outline numbering to associate with the section in a generated document while preserving special character formatting such as making text bold or underlining a word.

The system applies these paragraph styles for any section content that does not have explicit override paragraph styles or lists defined for it within the section itself. 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 the Microsoft Word Integration with Supplier Contract Management appendix.

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See Appendix A, "Microsoft Word Integration with Supplier Contract Management," page 701.

Section Bind Variables and Repeating Sections

Sections also act similarly to clauses with regard to their use of binds and repeating sections. Sections can contain binds within the section title or section body.

Note. If a section 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.

See Chapter 9, "Managing the Contract Library," Bind Variables and Repeating Clauses, page 279.

Understanding Document Rules

A rule is a user-defined set of data and conditions that the system uses to determine whether to include any additional specific clauses or sections in a generated document, or to determine whether an alternate clause is to substitute for the initial clause that was intended for the document.

Rules can reference bind variables, which enables you to retrieve actual field values from a transaction's record or wizard response when the system processes the rule during document generation. So depending on an author's responses to certain wizard questions or other transactional bind values that are specific to the document that the system is generating, you can use the rule to include additional pertinent content within the document.

See Chapter 9, "Managing the Contract Library," Binds, page 290.

This list summarizes how you use rules:

- Create standard rules to evaluate transactional information.

  You can define a rule, for example, to check for a specific vendor. Using the predefined bind variable VENDOR_ID, which is supplied by PeopleSoft Supplier Contract Management, you can retrieve the actual field value for a transactional purchasing contract and include the content that is specific for that vendor.

- 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 for a specific vendor ID, you need to substitute the liability clause with a modified version. You can do this by creating an alternate rule that checks whether the VENDOR_ID bind variable is *XYZ*. Using the Clause Definition page, you can add the alternate clause and associated rule in the Alternates grid.

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- Create standard rules to evaluate wizard responses.

  Rules that are used in conjunction with wizard responses provide a powerful tool for controlling additional content in generated documents. You use this feature by defining different wizard variables. Then you define a wizard and its related question groups and questions that are designed to prompt the document author for specific values. You then create a rule for the system to evaluate those values and take the appropriate action to add content in the completed document.

  For example, you want to use a rule in a wizard to add an on-site inspection section to a building document. You would use 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 during document generation 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.

The next sections describe additional rule features.

See Chapter 9, "Managing the Contract Library," Setting Up Contract Rules, page 330.

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 in document generation 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 both standard and alternate rules with simple operands and binds. Basic queries can reference multiple bind variables and values, but all comparisons must be processed with a simple '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 is one that has binds that are from a level greater than zero. If the rule is against a child-level transactional repeating record, such as a contract item line for a transaction at level one, the content types and their children that are attached to that rule are transferred into the document for each row of a repeating rule.

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Content elements (sections and clauses) that are listed for a rule should not have binds or should have level-zero binds only 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 directly. 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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Mapping Bind Variables, page 247.

Alternate Rules

When rules are attached to alternate clauses, the system uses the rule to determine which of the alternate clauses to use. Each alternate clause can have an associated 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 none of the rules is true, the system uses the original main clause and does not make a substitution.

During document generation, if a substitution takes place, the system replaces the lead clause information in the document with the alternate clause information.

Note. Substitution of clauses happens for only the lead clause and not the alternate clause. So in the previous example, if the alternate clause itself has alternate clauses and rules defined for it, the system doesn't evaluate those alternate clauses.

Understanding Bind Variables

This section discusses:

- Binds.
- Bind definition steps.
- System-supplied binds.
- Bind use standards.
- Use bind variables in document headers and footers.

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Binds

Binds that you use in PeopleSoft Supplier Contract Management are variable definitions that enable you to map source transactional values, such as a purchase order transactional contract or contract wizard values, to content within clauses, sections, and Microsoft Word templates. When the system processes binds during document generation, the value of the record field that is mapped to the transactional bind variable or the response value of a wizard bind variable replaces the bind variable placeholder in the document. You can also use binds in rules. This enables the inclusion of additional or alternate clauses in documents that you create and maintain.

Binds are stored in a central table that you access using the Binds page. A bind can apply to specific transactions, while others might apply across a variety of transactions.

The system uses binds:

- Within the body of text in document clauses and sections.

  When you are 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 for use with the contract wizard. Wizard binds can exist without any source transaction objects. Binds for the wizard are defined in the CS_BIND table with a CS_BIND_TYPE of Wizard=3.

- Within Microsoft Word templates.

  This feature involves adding bind variables in the header and footer section of a Microsoft Word template such as the version number, contract number, or amendment number. If a document or Microsoft Word template is setup with transactional bind variables, you need make sure that the transactional sources match when you associate the template to a document configurator. Otherwise, you could have unresolved binds in the header and footer. For example, if you have a contract document with a purchasing contract source transaction type, but the Microsoft Word template associated with the document configurator contains ad hoc bind variables, the system leaves the binds unresolved in the contract document.

- Within rules.

  When the system processes the bind, it replaces the bind with the real 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 (translate value) values.

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- Within the bind-mapping definition of the source data transaction.

  The system maps the bind to its equivalent record or field in each purchase contract transaction. This mapping provides the link between the bind variable and the record (view) and field from which to retrieve the value. In addition, and because each view's source record has a defined level, the system defines whether the bind is of a repeating nature. For example, a bind variable that is mapped to the contract header for contract amount would be a zero level, which does not repeat, whereas a bind variable that is mapped to the contract item list, which is at level one (multiple items per contract), would inherit a repeating characteristic of level one.

  Also, a bind variable that is mapped to contract milestones that are children of a contract line would inherit a repeating characteristic of level two, and so on.

Note. Many of the commonly used source transaction records, views, binds, bind mappings, and bind variables 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.

- Within wizards, you use 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 to indicate additional content (clauses) that should appear in a contract. There are rules that use each check box bind variable to determine whether a clause should appear based on if it was checked or not when the wizard was invoked. You create wizard binds using the Bind Definition page, and selecting *Checkbox* in the Field Type field.

  The system uses check box binds only within wizards. The bind values are *Y* (yes) and *N* (no). The default value is *N*, and only the *Y* value controls wizard navigation. After a check box bind is in use, you cannot change it.

- Within prompt tables. Prompt tables provide a list of values from which you can select to respond to wizard questions. This is an alternative to setting up a list of valid values for specific fields that already have values in the database. Prompt tables are primarily for ad hoc document generation for which certain values cannot be easily derived from a source transaction, and thus you must be prompted for them. These values are limited to basic codes and do not support multiple key-structured views/tables, such as vendor or item information. After the system stores the value in the bind, you can use the prompt in rules just like any other variable.

  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.

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- Within string format masking. A mask defines the number of characters used as input and how the system organizes the data. Setting a mask on a bind variable ensures that when you enter data into the bind variable using the wizard, you enter the data in the proper format. Masking ensures that numeric values and alpha characters are used where they are required and that any special constants are included. When you define the mask for the bind variable, the system displays an example of how the mask will be used in the wizard. You use masking when you have information that is critical to a contract document and that 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

  When you enter information using the wizard, you can enter the data including the mask, or you can enter just the data and the system formats it into the mask. A mask can have three substitution characters. These characters serve as placeholders for the actual values that will be entered when the wizard is invoked. Substitution characters include:

  1. A - alpha character
  2. 9 - number
  3. @ - any character

     Other characters used in the format will be 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 Field Length field. Only field lengths of 30 or less may contain masks. The value plus the mask characters must be less than or equal to the field length value.

- Within long characters that are a part of the string format feature. Long characters enable you to use the wizard to add larger paragraphs to authored documents rather than 254 text. For example, when adding an ad hoc clause that might not exist in the system but would be specific only to the contract being constructed and not intended to be reused. You define the bind setting using the *Long Char* value in the Field Length field on the Bind Definition page. You can define navigation only for questions that use a long-character field length. Long-character bind variables have some limitations such as they cannot be used within a rule.

  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 Enter button on the keyboard.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Mapping Bind Variables, page 247

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 nonwizard binds, such as those related to the purchasing transactional contract or ad hoc binds.

2. Review the defined source transaction structures that include the source and parent records.

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3. Map the binds to the view of the source transaction record.
4. Use 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 transactional purchasing contracts and purchase order contracts. All bind types that the system supplies are TRANS type binds. The binds are mapped based on their description. Descriptions include:

- PO contract: Maps to source transactions in the transactional purchasing contract.
- Purchase order contract: Maps to source transactions in the transactional purchase order contract.
- Ad hoc: Maps to ad hoc source transactions.
- Document: Maps to values on the Document Management page for source transactions in ad hoc, purchasing contract and purchase order contract documents.

PeopleSoft Supplier Contract Management delivers the transactional bind types described in this table:

Bind Variable	***Description***	***Field Type***
ADMINISTRATOR	PO Contract Buyer ID	String
ADMINISTRATOR_DESCR	PO Contract Buyer Descr	String
ADMINISTRATOR_FAX	PO Contract Buyer FAX	String
ADMINISTRATOR_PHONE	PO Contract Buyer Phone	String
CATEGORY_AGREE_CODE	Adhoc NDA Number	String
CATEGORY_AGREE_DESCR	PO Contract Cat Agree Desr	String
CATEGORY_AGREE_TARGET_DATE	PO Contract Cat Target Date	Date
CAT_AMT_LINE_MAX	POContract Category Max Amount	Decimal
CAT_CATEGORY_DESCR	PO Contract Cat Category Descr	String
CAT_EXCL_ITEM_ID	PO Contract Cat Excl Item ID	String
CAT_EXCL_LINE_NBR	PO Contract Cat Excl Line Nbr	Integer
CAT_LINE_NBR	PO Contract Category Line Nbr	Integer
CONTRACT_AMT	PO Contract Amount	Decimal
CONTRACT_DESCR	PO Contract Description	String

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Bind Variable	*Description*	*Field Type*
CONTRACT_END_DATE	PO Contract End Date	Date
CONTRACT_HDR_COMMENTS	PO Contract Header Comments	String
CONTRACT_ID	PO Contract ID	String
CONTRACT_LINE_COMMENTS	PO Contract Line Comments	String
CONTRACT_MAX_AMT	PO Contract Maximum Amount	Decimal
CONTRACT_SHIP_COMMENTS	Contract Ship Comments	String
CONTRACT_SINGLE_PO_ID	PO Contract Single Rel PO Num	String
CONTRACT_START_DATE	PO Contract Start Date	Date
CURRENCY_CODE	PO Contract Currency Code	String
CURRENCY_CODE_DESCR	PO Contract Currency Code Desc	String
CURRENCY_RATE_TYPE	PO Contract Currency Rate Type	String
CURRENCY_RATE_TYPE_DESCR	PO Contract Cur Rate Type Desc	String
DOC_ADHOC_ID	Adhoc Document ID	String
DOC_ADMINISTRATOR	Adhoc Document Administrator	String
DOC_AMENDMENT_NBR	Document Amendment Number	String
DOC_BEGIN_DATE	Adhoc Document Begin Date	String
DOC_CONTACT_ADDRESS1	Document Contact Address1	String
DOC_CONTACT_ADDRESS2	Document Contact Address2	String
DOC_CONTACT_ADDRESS3	Document Contact Address3	String
DOC_CONTACT_ADDRESS4	Document Contact Address4	String
DOC_CONTACT_CITY	Document Contact City	String
DOC_CONTACT_COUNTRY	Document Contact Country	String
DOC_CONTACT_COUNTY	Document Contact County	String
DOC_CONTACT_EMAIL	Document Contact Email	String
DOC_CONTACT_EXTENSION	Document Contact Extension	String

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Bind Variable	*Description*	*Field Type*
DOC_CONTACT_NAME	Document Contact Name	String
DOC_CONTACT_PHONE	Document Contact Phone	String
DOC_CONTACT_PHONE_COUNTRY_CD	Document Contact Phone Country	String
DOC_CONTACT_PHONE_TYPE	Document Contact Phone Type	String
DOC_CONTACT_POSTAL	Document Contact Postal Code	String
DOC_CONTACT_STATE	Document Contact State	String
DOC_CONTACT_TITLE	Document Contact Title	String
DOC_DEPTID	Document Department ID	String
DOC_EXPIRE_DATE	Document Expire Date	Date
DOC_OWNER	Document Owner	String
DOC_VERSION_NBR	Document Version Number	Decimal
HDR_AGREE_CODE	PO Contract Hdr Agreement Code	String
HDR_AGREE_DESCR	PO Contract Hdr Agreement Desc	String
HDR_AGREE_TARGET_DATE	PO Contract Hdr Agree Tgt Date	Date
ITEM_DESCR	PO Contract Item Description	String
ITEM_ID	PO Contract Item ID	String
LINE_AGREE_CODE	PO Contract Line Agreement Cd	String
LINE_AGREE_DESCR	PO Contract Line Agreement Dsc	String
LINE_AGREE_TARGET_DATE	PO Contract Line Agree Tgt Dt	Date
LINE_CATEGORY_CODE	PO Contract Category Code	String
LINE_CATEGORY_CODE_DESCR	PO Contract Category Code Desc	String
LINE_CURRENCY_CD	PO Contract Line Currency CD	String
LINE_CURRENCY_CD_DESCR	PO Contract Line Currency CD	String
LINE_MERCHANDISE_AMT	PO Contract Line Merch Amt	Decimal
LINE_NUMBER	PO Contract Line Number	Integer

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Bind Variable	*Description*	*Field Type*
LINE_QTY_MAX	PO Contract Line Max Quantity	Decimal
LINE_QTY_MIN	PO Contract Line Min Quantity	Decimal
LINE_STATUS	PO Contract Line Status	String
LINE_UOM	PO Contract Line UOM	String
MASTER_CONTRACT_ID	PO Contract Master Contract	String
MFG_ID	PO Contract Manufacturer ID	String
MFG_ITEM_ID	PO Contract Mfg Item ID	String
MILESTONE_AMOUNT	PO Contract Milestone Amount	Decimal
MILESTONE_NBR	PO Contract Milestone Number	Integer
MILESTONE_STATUS	PO Contract Milestone Status	String
PAYMENT_TERMS	PO Contract Payment Terms	String
PAYMENT_TERMS_DESCR	PO Contract Payment Terms Desc	String
PERCENT_COMPLETE	PO Contract Milestone % Cmplt	Decimal
PO_CHANGE_ORDER_NBR	PO Change Order Number	Integer
PO_DUE_DATE	PO Due Date	Date
PO_FREIGHTTAXMISC	Purchase Order Freight/Tax Sum	Decimal
PO_FREIGHT_AMT	Purchase Order Freight Sum	Decimal
PO_ID	Purchase Order ID	String
PO_LINE_NUMBER	PO Line Number	Integer
PO_LS_DUE_DATE	PO Line/Shipment Due Date	Date
PO_LS_ITEM_DESCR	PO Line/Shipment Item Descr	String
PO_LS_ITEM_ID	PO Line/Shipment Item ID	String
PO_LS_LINE_NBR	PO Line/Shipment Line Number	Integer
PO_LS_LINE_UOM	PO Line/Shipment PO Line UOM	String
PO_LS_MERCH_AMT	PO Line/Ship Merchandise Amt	Decimal

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Bind Variable	*Description*	*Field Type*
PO_LS_PRICE	PO Line/Shipment Price	Decimal
PO_LS_QTY	PO Line/Shipment Quantity	Decimal
PO_MISC_AMT	Purchase Order Misc Amt Sum	Decimal
PO_PRICE	PO Price	Decimal
PO_QTY	PO Schedule Quantitiy	Decimal
PO_SALESTX_AMT	Purchase Order Sales Tax Sum	Decimal
PO_SCHEDULE_NBR	PO Schedule Number	Integer
PO_USETAX_AMT	Purchase Order Use Tax Sum	Decimal
PO_VAT_AMT	Purchase Order VAT Sum	Decimal
RENEWAL_DATE	PO Contract Renewal Date	Date
REQ_BU	Requistion Business Unit	String
REQ_ID	Requisition ID	String
RETENTION_AMOUNT	PO Contract Retention Amount	Decimal
RETENTION_CD	PO Contract Retention Code	String
RETENTION_PERCENT	PO Contract Retention Percent	Decimal
SOURCETRANS	ERP Source Transaction	Decimal
SPONSOR	Document Sponsor	String
USER_CHAR10_1	User Defined Char 10 (1)	String
USER_CHAR10_2	User Defined Char 10 (2)	String
USER_CHAR10_3	User Defined Char 10 (3)	String
USER_CHAR10_4	User Defined Char 10 (4)	String
USER_CHAR10_5	User Defined Char 30 (5)	String
USER_CHAR10_6	User Defined Char 30 (6)	String
USER_CHAR10_7	User Defined Char 30 (7)	String
USER_CHAR10_8	User Defined Char 30 (8)	String

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Bind Variable	*Description*	*Field Type*
USER_CHAR10_10	User Defined Char 60 (10)	String
USER_CHAR10_9	User Defined Char 60 (9)	String
USER_DATE1	User Defined Date (1)	Date
USER_DATE2	User Defined Date (2)	Date
USER_DATE3	User Defined Date (3)	Date
USER_DATE4	User Defined Date (4)	Date
USER_DATE5	User Defined Date (5)	Date
USER_DECIMAL1	User Defined Decimal 23.3 (1)	Decimal
USER_DECIMAL2	User Defined Decimal 23.3 (2)	Decimal
USER_DECIMAL3	User Defined Decimal 23.3 (3)	Decimal
USER_DECIMAL4	User Defined Decimal 11.4 (4)	Decimal
USER_DECIMAL5	User Defined Decimal 11.4 (5)	Decimal
USER_INTEGER1	User Defined Integer (1)	Integer
USER_INTEGER2	User Defined Integer (2)	Integer
USER_INTEGER3	User Defined Integer (3)	Integer
USER_INTEGER4	User Defined Integer (4)	Integer
USER_INTEGER5	User Defined Integer (5)	Integer
USER_INTEGER6	User Defined Integer (6)	Integer
USER_INTEGER7	User Defined Integer (7)	Integer
USER_INTEGER8	User Defined Integer (8)	Integer
VENDOR_ADDRESS1	PO Contract Vendor Address 1	String
VENDOR_ADDRESS2	PO Contract Vendor Address 2	String
VENDOR_ADDRESS3	PO Contract Vendor Address 3	String
VENDOR_ADDRESS4	PO Contract Vendor Address 4	String
VENDOR_CITY	PO Contract Vendor City	String

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Bind Variable	*Description*	*Field Type*
VENDOR_CONTRACT_REFERENCE	PO Contract Reference Number	String
VENDOR_COUNTRY	PO Contract Vendor Country	String
VENDOR_COUNTY	PO Contract Vendor County	String
VENDOR_ID	PO Contract Vendor ID	String
VENDOR_ITEM ID	PO Contract Vendor's Item ID	String
VENDOR_NAME	PO Contract Vendor name	String
VENDOR_NAME_SHORT	PO Contract Vendor Short Name	String
VENDOR_POSTAL	PO Contract Vendor Postal Code	String
VENDOR_STATE	PO Contract Vendor State	String

Bind Use Standards

Clauses and sections are stored off the record view name and the level in the child source transaction table. The system uses binds as described in this list:

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- 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.

    They do not repeat in nature.
  - Bind levels that are greater than zero cannot be mixed in the same clause, rule, or section because levels that are greater than zero define the repeat nature of the clause, rule, or section itself.

    For example, you cannot have a bind on both the contract item ID (level one) and contract item milestone (level two) in the same section title text.
  - 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 at both level one and contract header level agreements (level one) because as the system generates the document, it must repeat the clause based on one repeating record view.
  - When bind variables within clauses or sections are children of clauses or sections with bind variables, the record keys for those bind variables must include the key structure of the parent clause or section bind variables.
  - If children of the parent clause or section have binds, they use these standards:

    If a 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, or level two binds. The level must be greater than or equal to the parent level for binds in the children. For example, a clause containing a line milestone at level two must report to a section or clause above it that repeats on the contract line at level one.

    If a primary object repeats at level two, its children can have no binds, level zero, level two, or level three binds. Its level must be equal to or greater than the parent level or it should not have a level. In all of these cases, level zero binds can coexist with any other level binds.

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- Rule binds use these standards:
  - When you are adding a rule to a section object, if that rule repeats in that its criteria is dealing with binds at levels greater than zero, the rule can be attached only under a section that is repeating on that same level of information.

    ```
    Example:
    Section repeats on Item
    - Rule If item = 'xxxx' then include clause A
    - Rule if Item = 'yyyy' then include clause B
    - Clause C
    - Clause D
    ```

  - Rules don't 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 services or a product item, you set 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, then use this setup:

    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.

See Also

Chapter 9, "Managing the Contract Library," Setting Up Contract Rules, page 330

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Understanding Document Configurators

A document configurator is a collection of sections, clauses from the library, ad hoc clauses, and rules that compose the overall structure and wording 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 and order of the document elements and provides static and dynamic structure within a document. The 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.

Another type of content, the ad hoc clause, is content that you add to the 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.

You create ad hoc clauses by selecting the *Ad Hoc Clause* content type on the Insert a Content Row page. This page enables you to enter text for the clause's content description, title, and full text. You can also use Microsoft Word to add rich text by using the Edit in Word button on the Insert a Content Row page. You can upload the edited content into the PeopleSoft system. The process for ad hoc clause creation does not use the Edit Document and Check In features or the clause approval process. Also, ad hoc clauses cannot contain bind variables.

Document configurators are not version or effective-date controlled. However, they are dynamic in that you can introduce changes over time. Changes might include new sections, clauses, or rules. You can define configurators for use with ad hoc contract, purchasing contracts, and purchase order contract documents.

You can create configurators for use with amendments only and include an amendment placeholder section in the amendment document configurator. This functionality is enabled for only the Amend Contract with Amendments option. The system includes the compare results between the last executed contract and recent edits to the main amended contract. The system determines changes to contract documents by using Microsoft Word to compare current contract document to the last created or executed contract. 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 a contract from one transaction source to a contract for another source, such as copying an ad hoc contract document to create a purchase order contract document.

Using the View As Of Date feature, you can see the current status and effective date of the element in use. The date is based on the as of date that you can enter. This feature also enables you to preview how the configurator content appears as of a certain date. So the document configurator is essentially a set of pointers back to content in the library, and it is ultimately the contract start date that determines which version of the content is included when you generate document at any time.

Depending on requirements, 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. A 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.

Note. You can create document configurators either by using the Document Configurator Definition page or by creating a configurator in conjunction with importing clause and section objects. When you create a configurator using the Import Clauses/Sections page, you can apply the structure and contents of a legacy contract and automatically create the configurator.

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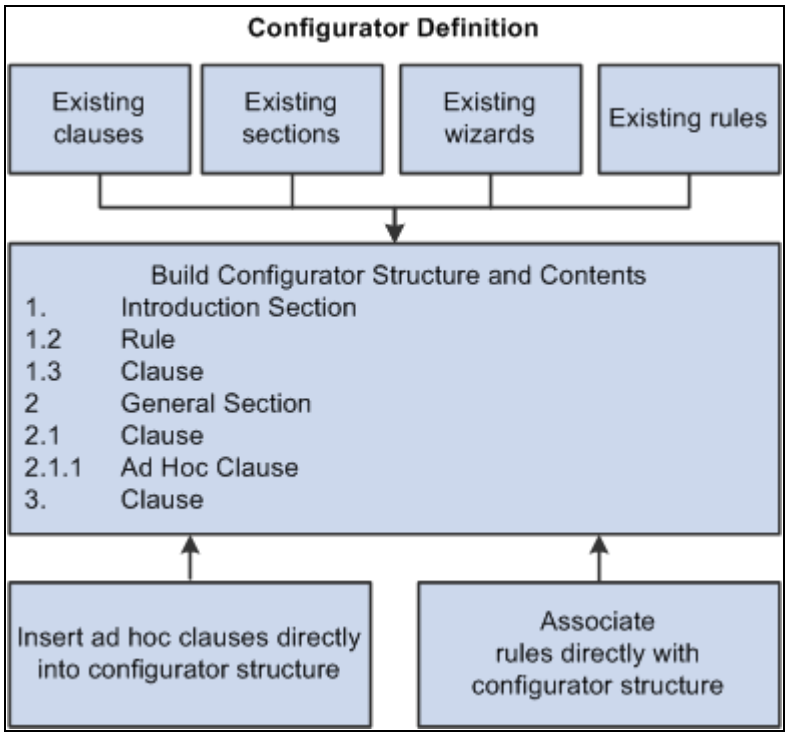
See Chapter 11, "Importing Clauses, Sections, and Documents," Creating a Document Configurator During Object Import, page 421.

This example illustrates how contract library elements are brought together and organized in a configurator and how ad hoc clauses and rules can be added from within the configurator:



Document configurator flow for creating contract documents

The document configurator references a Microsoft Word template that plays a major role in the resulting format and styles that the system applies to a generated document. You define templates for use with a configurator using the Document Templates and Styles and the Document Format and Options pages in the Supplier Contract Setup menu option.

The settings within this component determine 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 titles 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 during document generation.

Note. The system applies paragraph styles for any clause or section content that does not have an explicit override paragraph style or list defined for it within the clause itself.

Paragraph styles in Microsoft Word and attributes of the outline numbering define what numbering scheme the system uses, indentation for titles and body text, and fonts and font size that are used for the overall text. Because templates have such an impact on document format, you should define Microsoft Word templates to meet document needs prior to generating documents with them.

You need some working knowledge of Microsoft Word and paragraph styles to set up the template properly. As you develop the Microsoft Word template, you should create a trial document configurator and use the Preview feature within the document configurator to review and evaluate the format of the finished document.

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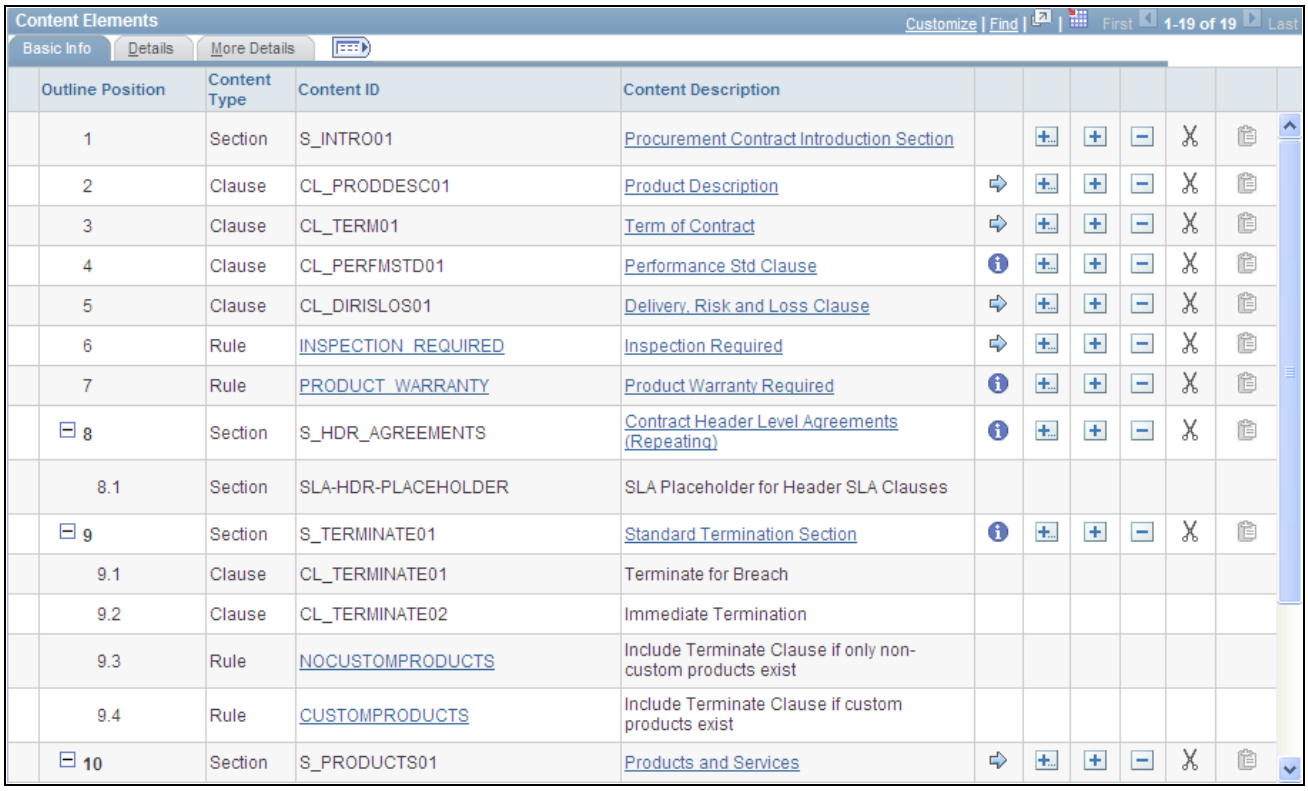
During document preview and generation, the system uses the Microsoft Word template and setup definitions to determine which paragraph style and outline numbering to associate with the clauses in a generated document while preserving special character formatting such as making a word bold or underlining a word.

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 into section, clause, and rule elements in the clause library and, if needed, by adding specific ad hoc clauses for the configurator. After you define the configurator, you can manage elements by either indenting and outdenting 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.

Note. Changing the indentation level of elements within the configurator can also affect the indentation within the generated Microsoft Word document. This depends on how you define indentation for each outline level within the Microsoft Word template.

The next example shows how elements might 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:



Content Elements — Customize | Find | First 1-19 of 19 Last

Basic Info | Details | More Details

Outline Position	Content Type	Content ID	Content Description
1	Section	S_INTRO01	Procurement Contract Introduction Section
2	Clause	CL_PRODDESC01	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

Configurator content elements example

You can expand and collapse configurator elements and view up to nine levels. Four levels appear in the example. For maintenance purposes, the system automatically defines the outline numbering for the configurator element as you maintain the configurator.

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See Also

Chapter 9, "Managing the Contract Library," Defining Basic Configurator Information, page 339

Chapter 9, "Managing the Contract Library," Viewing and Maintaining Configurator Structures, page 349

Understanding Contract Wizards

A wizard is a tool that automatically guides document authors to answer questions. It then enables the authors to use the answers to those questions as input to a generated document. The wizard uses wizard binds or rules that can affect a document through alternate clauses or by inserting additional clauses or sections based on the answers. You can define a wizard and use it with one or more document configurators to guide authors during document generation.

You can also define a wizard that helps authors determine what document configurator best meets the needs of the document they are creating when multiple configurators are defined for a document type. You can define configurator selector wizards for document types when multiple configurator IDs are available that you might apply for the selector wizard.

See Also

Chapter 10, "Using the Contract Document Wizard," page 365

Understanding Document Types

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. 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 those types of 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 contract 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 more simplified Draft and Approved status option or, even more simple, 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, enabling collaboration, and enabling digital signatures. In addition, you can enable, as needed, user-defined fields and cycle-time properties for document types. These actions make it possible for each type of document to have its own specific and unique attributes.

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You can use document types within the requisition flow for requisitions that will require new contracts. 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 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 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 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. 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.

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 page. You can create document types, but the system does not apply them during document creation until the installation option is selected.

Document type features include:

- Different approvals for documents of specific document types through the Approval Framework.
- Capability to launch a 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.
- Start sequence selection for auto numbering of ad hoc IDs.
- Appropriate configurator selection.

  Using document types, you can use the system to help you determine the appropriate configurator. You can select a configurator based on either a specific configurator or a configurator selector wizard. A specific configurator always uses the same configurator for the document type, whereas a wizard provides a set of questions for you to answer. Based on the question answers, the system provides the appropriate configurator.
- Automatic generation of ad hoc documents.

  You use this feature to help streamline the creation of documents. When you select the 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. So users who may not need to define document details to the level that a contract specialist might need to can more easily create a document. If a wizard is associated with the configurator, the system goes directly to the wizard questions after you enter document key information in add mode as you would do when adding documents from a requisition.
- Document type life-cycle statuses and settings for editing, collaboration, and electronic signatures.
- Cycle-time and workbench settings.
- User-defined fields that provide you a way to define additional user-defined attributes that you can associate to a document.
- Security for who can create a type of document and who can view a type of document.

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Understanding Contract Library Searches

You can use the Verity search index for searches in the contract library. Verity searches enable you to search the content of clauses, sections, and current documents. For example, you can use Verity searching to search for clauses and sections by content while creating document configurators. You can also perform Verity searches for content in imported documents and for specific document types.

You perform Verity searches using the Search Contents menu option to set up and to perform the searches. If you do not enable Verity searching, you can still use standard PeopleSoft search pages and prompts for clauses, sections, and rules for searching. However, without Verity searches, you cannot search content such as clause text or the text within a document.

See Also

Chapter 14, "Searching for Library and Document Contents," page 591

Defining Contract Clauses

This section provides overviews of defining dependent clauses and adding bind variables, and discusses how to:

- Define clause information.
- Define dependent clauses.
- Define alternate clauses and related rules.
- Associate clauses with clause groups.
- Add bind variables to content fields.
- Preview clause approvals.
- Submit clauses for approval.

Understanding Defining Dependent Clauses

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

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

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Understanding Adding Bind Variables

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.

   The system displays details about the predefined variable when you click the Search button.

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 selected 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 %%Vendor Name%%, %%Location%%, and %%Item Description%%.

Pages Used to Define Contract Clauses

Page Name	*Definition Name*	*Navigation*	*Usage*
Clause Definition	CS_CLAUSE_DEFN	Supplier Contracts, Manage Contract Library, Clauses	Define clause information. Define dependent clauses. Define alternate clauses and related rules. Submit clauses for approval.
Copy Information From	CS_OBJS_COPY_SP	Click the Copy From button on the Clause Definition page.	Create a clause by coping the clause from an existing clause. After you make the copy, you can incorporate new values into the clause.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Associate to Clause Group	CS_ASSOC_CLSGRP_SP	Click the Associate to Clause Group link on the Clause Definition page.	Associate clauses with clause groups.
Add Bind Variables to Content Fields	CS_OBJ_ADDBINDS_SP	Click the Add Variables button on the Clause Definition page.	Add a bind variable to the content of a clause. Binds that are used in PeopleSoft Supplier Contract Management are variable definitions that enable you to map source transactional values or contract wizard values into contract clauses.
Clause Approval Status	CS_CLS_APPROVAL	• Click the Preview Approval button on the Clause Definition page. • Click the Submit for Approval button on the Clause Definition page.	Preview clause approvals. This feature is available only when installation options require that clauses must be approved.

Defining Clause Information

Access the Clause Definition page (Supplier Contracts, Manage Contract Library, Clauses).

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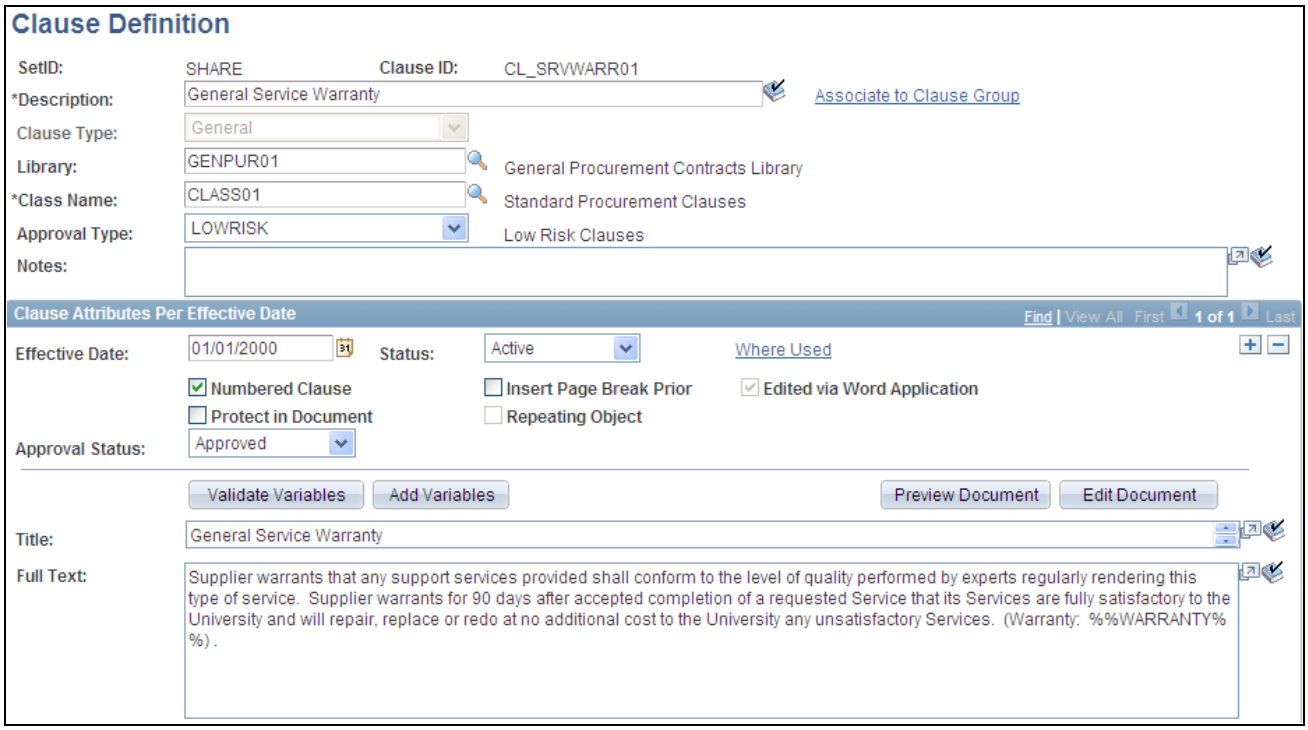
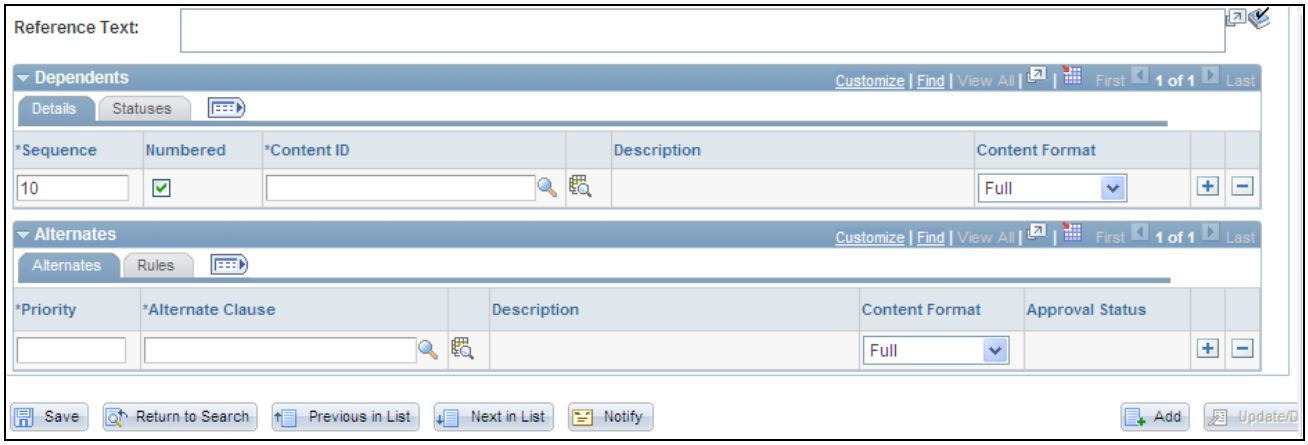


Clause Definition page: Details tab (1 of 2)



Clause Definition page: Details tab (2 of 2)

Use this page to define contract clauses. You can also define alternate and dependent clauses, as well as associate the clause with clause groups.

You can define multiple clauses for use in creating documents. You can create clauses directly using this page or by using Microsoft Word, which you can use for more rich-text editing.

When you insert a clause into sections or document configurators, the content format value for the section or configurator determines whether text is used from the Full Text field or the Reference Text field. You 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.

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Copy From

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 the button, the system provides a list of existing clauses.

Associate to Clause Group

Click to access the Associate to Clause Group page, where you can associate the clause with a clause group. By grouping clauses, you can use them in searching, filtering, and selecting document clauses.

You can use a clause group to add groups of clauses that are associated with a group to a configurator. In this case, the group assists in the selection of objects. However, you cannot associate the group itself with a document configurator.

Clause Type

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:

General: Indicates the clause is for normal use. This is the default value for the field.

Table: Indicates that the clause is for use with tables. 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 *Table.*

See Chapter 9, "Managing the Contract Library," Using Tables in Clauses, page 280.

Note. If there are no repeating binds defined for the clause when you save the clause, the system displays a warning that you cannot use the clause, but you can save it.

Library

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. You define and organize clauses in the library. You can use a clause only in one library definition. You use libraries to associate related clauses. Libraries also facilitate searching for clauses.

Class Name

Select the clause class with which you want to associate this clause. You use classes to group similar clauses for searches. Class Name is a required field and determines which if any approval types are available for the clause.

Approval Type

Click to select an approval type for approving clauses. The system bases the available values in this field on the approval types that have been defined for the class name that you selected. Approval types control which, if any, approval routing the clause requires as well as clause usage within documents. The system can provide a default value for the approval type based on the associated class name.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up Approval Types, page 243.

Notes

Enter informational text that is related to this clause. The system does not use the text for validation.

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Effective Date Select an effective date. Clauses are effective-dated to enable you to keep a history of clause text and approvals and to make future changes to existing clauses without affecting existing clause terminology that may already be in use on given documents. During document generation, the system uses the start date of the contract to determine which valid clauses to include in a document. As you introduce clause changes, you should select an effective date that represents the effective-dated clauses that you want to include in new contracts. When the system creates new effective-dated rows for the clause, it assigns the new row an approval status of *Initial.*

Status Select a status to assign to the clause. The system requires the Status field with all effective-dated records in PeopleSoft Supplier Contract Management. For clauses, this status is typically Active, even for clauses that are pending approval.

When you need to completely deactivate a clause or temporarily put a clause on hold so that the system does not use it in a document, you can set the status to *Inactive.* This prevents the clause from being included in new documents.

Edited via Word Application (edited using Microsoft Word application) This indicator appears if the clause was checked out and edited in Microsoft Word. If the check box is selected and disabled, the document was edited. You may have rich text associated with the clause that would be lost if you were to make edits directly using this page. If you attempt to edit the document, the system displays a warning.

Where Used Click to identify where this clause is used, which includes sections and document configurators. Using the where-used search results, you can perform additional where-used searches. For example, you can determine which documents were generated using the document configurator that contained this clause.

Numbered Clause Select to indicate that this clause will be numbered in the Microsoft Word document. The clause title is numbered according to the default numbering style that is defined in the Document Format and Options setup page. The check box is selected as the default setting. An example of numbered clauses is:

```
1. Introduction
2. Opening paragraph
```

If you deselect the check box, the clause is not numbered in the document or preview document. For example:

```
Introduction
Opening paragraph
```

Insert Page Break Prior Select to begin the clause on a new page. The document will contain a page break prior to this clause. This is useful, for example, when you are creating signature pages for the contract. When the system generates WordML, it writes a page break *wordml* tag before writing out the clause data.

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Protect in Document Select to indicate that the clause should be protected in a document, meaning 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.

The field is deselected as the default value. When you select to protect the clause, the system displays that the clause is protected in the Content Elements grid on the Document Configurator Definition page.

When 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.

Suppress Duplicate Keys Select to suppress duplicate keys in a table clause. When you suppress duplicate keys, the system blanks out 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.

When you select this check box, the Last Key Field Column becomes available where you can define the last column to which you want to suppress duplicate values.

Last Key Field Column 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 Chapter 9, "Managing the Contract Library," Table Clause Examples, page 282.

Repeating Object Indicates whether this clause is repeating in nature. You do not enter this clause attribute. The system derives the value based on the bind variables that are included in the clause. If the system includes a bind variable that repeats, such as *%%Item ID%%* (level one) in the clause title or text, it sets this check box to selected. The Repeating Object check box is typically deselected for most clauses. Because special rules and edits can be applied as repeating objects, this check box helps you identify when an object is repeating.

When you are adding a table clause, the system will select this check box.

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Approval Status

Displays the approval status for the clause. This field is disabled if the system requires the clause to go through the Approval Framework for approval processing. When you use the workflow process, the system automatically updates the field, depending on the approval progress. You define clause approval requirements using installation options.

If approval workflow is not required as defined on the Installation Options page, then the default value that is established in user preferences for the person who is creating the clause controls the default value of the approval status. For example, to save time in approving clauses, you could provide the clause librarian the authority to create a clause that is already in the *Approved* status. This setting also applies when the librarian checks out and edits a document. The system sets the status back to approved upon check-in.

The approval status must be set for each new 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 user preferences permissions for approving clauses.

If workflow approvals are required, the Preview Approvals and Submit for Approval buttons also appear on this page. If approvals are not required, the field can also be set manually.

Note. 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 *Approved.*

See Chapter 17, "Approving Documents and Document Components," Approving Clauses, page 651.

Validate Variables

Click to call validation routines to verify that bind variables in the clause exist and that they are being used correctly in case repeating binds exist. This selection is the same as saving the clause, except that validating bind variables enables you to verify the binds of the clause for use without saving it.

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 in use. These validations ensure that any dependent clause structures that might repeat contain repeating binds with proper levels and internal key structures relative to binds that the system uses in the main parent clause.

If errors occur with the validation, the system populates the Errors grid with the issues.

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Add Variables

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 add a placeholder location within the clause that the system will replace by using an actual transactional or wizard value when it generates the document.

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 in the clause title, full text, or reference text without using the Add Variable button.

Note. 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 any Microsoft Word formatting you may have made to the clause.

See Chapter 9, "Managing the Contract Library," Adding Bind Variables to Content Fields, page 321.

Preview Document

Click to open the clause in a read-only mode using Microsoft Word. During the preview, the system applies paragraph-style formatting from the Microsoft Word template that is defined for the setID. The preview also expands dependent clauses.

Note. Numbered clause preview always starts at the first number in the Microsoft Word numbering scheme; however, when the system generates the final document, the numbering changes based on positions in the document.

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Edit Document

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 better help you create the contract library.

When you click this button, the system displays the Checked Out By and On fields and creates a Microsoft Word document that includes the title, full text, and reference text fields. You must save this file to the local client system using Microsoft Word 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 being edited as part of the file name.

While you can apply custom formatting using Microsoft Word, you should use the Microsoft Word template and paragraph styles for format processing during document preview and generation. This provides a consistent format of numbering and content for finished documents.

Note. You should refrain from applying custom paragraph styles while editing in Microsoft Word. You should limit style changes to character styles, such as changing characters to bold or underlining specific words.

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

Note. The system enables Microsoft Word document protection for the clause to protect hidden tags used by PeopleSoft Supplier Contract Management to recognize the title and text fields during check-in. Protection can at times prevent you from performing certain format changes using Microsoft Word. In these cases, you can deactivate the protection, make the change, then activate the protection again. The protection of a clause is typically set up by administrators.

See Appendix A, "Microsoft Word Integration with Supplier Contract Management," Protected Areas, page 721.

See Chapter 9, "Managing the Contract Library," Clause Text Editing, page 278.

Checked Out By

Displays the user ID of the person who is editing the clause.

On

Displays the date on which the clause was checked out for editing.

Cancel Checkout

Click to cancel the checkout of a clause without checking in any changes.

Note. If you saved a local version of the clause, it remains on the local client system.

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Check In

Click to check in the Microsoft Word version of the clause. 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. When you click Check In, the system:

1. Provides an Upload page with Browse,Upload, and Cancel buttons.

   If you know the exact location and file name of the clause, you can enter it and click Upload. If you don't know the location, click the Browse button.

2. Click Browse to locate the clause that you checked out.

3. Double-click the file to select it.

   The system displays an Upload button.

4. Click the Upload button to upload and check in the clause.

Note. The system validates the file you try to upload to ensure that it is an XML file and that it has embedded keys identifying it as the clause that was originally checked out.

Preview Approvals

Click to view approvers for the clause. This button is available when installation options have been set to require clause approval through the PeopleSoft Approval Framework. When you click this button, you access the Clause Approval Status page, where you can review information about approval stages and paths and who is reviewing or approving the clause.

Submit for Approvals

Click to initiate the approval process for the clause. This button is available when installation options have been set to require clause approval through the Approval Framework. 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 that the clause is waiting for their approval.

For clauses that do not require approval, the system displays a secondary page stating that approval isn't required, and automatically approves the clause.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up Approval Types, page 243.

See Chapter 17, "Approving Documents and Document Components," Approving Clauses, page 651.

Approval Details

Click to access the Clause Approval Status page, where you can review information about a clause that has already been sent for approvals or has already been approved. This link is available when installation options have been set to require clause approval through the Approval Framework.

Title

Enter descriptive text that identifies the clause's content.

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Full Text

Enter the text to use for a clause. You can specify either full text or reference text, but not both, when a clause is referenced in the system for use on, for example, a section or configurator. The text becomes a part of the document when you use this element to generate the document.

Click the Expand Full Text button to view a larger portion of the text. You might have to scroll to see all of the text, depending on the amount of text. Click the Collapse Full Text button to reduce the viewing area.

Typically, if you have a simple clause without any special formatting, 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, bolding, title font sizes, and text. If you require more detailed formatting, you can leave the title and body text blank and edit directly in Microsoft Word to complete the content.

Note. You should not cut and paste from current Microsoft Word documents 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 formatting issues with the clause in PeopleSoft Supplier Contract Management or by editing the clause in Microsoft Word.

See Appendix A, "Microsoft Word Integration with Supplier Contract Management," Character Limitations, page 720.

Reference Text

Enter a reference as additional information concerning the clause. Occasionally, you might need to use more simple references to an existing clause within the library instead of using or repeating the full text of the clause in a document. Reference text enables you to do this. For example, if you have a document that relates to hazardous materials, rather than including an entire clause such as the Federal Acquisition Regulation (FAR) 52.223-3 Hazardous Material Identification and Material Safety Data, site reference to this clause using the reference text when appropriate.

Note. If you are using a table clause, you cannot use reference text. Table clause require full text entries.

Defining Dependent Clauses

Access the Clause Definition page (Supplier Contracts, Manage Contract Library, Clauses).

Sequence

Enter a value that represents the order in which to use dependent clauses. The lowest value is the first clause to be used after the primary clause when the system generates the document.

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Numbered Select to make this dependent clause a numbered clause that follows the primary clause. The check box is available when you select the Numbered Clause check box for the primary clause. If the check box is deselected, the primary clause is not a numbered clause and, therefore, the dependent clause cannot be numbered.

If you select the Numbered Clause check box, then you can decide if you want to continue that numbering for dependent clauses. You can define which dependent clauses are numbered.

Note. The system determines the numbering of clauses in the preview of a clause by using paragraph styles and outline numbering that are defined in the default Microsoft Word template for the setID. The system determines the numbering of the clause in an authored document by using the Microsoft Word template that is associated with the document configurator.

Content ID Select a clause to use as a dependent clause for this primary clause. When you select this 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 here, it must have at least one effective-dated row that exists on or before the effective date of the primary clause.

Description Displays the description of the clause to use as the dependent clause for the current clause that you are maintaining. Click the Description link to access the Clause Definition page, where you can view or maintain the dependent clause.

Content Format Select how you want to represent the text in the document when you use this dependent clause. Select *Full* to enter the full text for the dependent clause so that it becomes a part of the document. Select *Reference* to use the reference text that is defined in the dependent clause.

Statuses

Select the Statuses tab.

The Effective Status column displays whether the dependent clause is at an *Active* or *Inactive* status. You cannot select a clause that is inactive; however, if the clause is being updated and has been changed to an *Inactive* 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.

The Approval Status column displays the current state of approval for the dependent clause. The states are *Initiated,Pending,* and *Approved.* You can assign a dependent clause regardless of its effective or approval status. If the dependent clause has been changed to an *Inactive* 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.

The system displays the Prior Approved Rows Exist 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.

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The system displays the Future Pending Change Exist column when pending rows for this dependent clause need to be approved before you use them.

See Also

Chapter 9, "Managing the Contract Library," Understanding Document Rules, page 287

Defining Alternate Clauses and Related Rules

Access the Clause Definition page (Supplier Contracts, Manage Contract Library, Clauses).

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.

Priority Enter 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 alternate clause's rule is met. If a rule is true, the system places all objects that are attached to the alternate clause's rule 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.

Alternate Clause 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.

See Chapter 9, "Managing the Contract Library," Alternate Clauses, page 284.

Click the Search 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, and groups in which a clause might be used, and dates on which the clause was checked out for editing.

Description Click to access the Clause Definition page for the clause you select.

Content Format Select how you want to represent the text in the document when you use this alternate clause. Select *Full* to select the full text for the alternate clause to become a part of the document when you use this clause to generate the document. Select *Reference* to use the reference text that is defined in the alternate clause.

Approval Status Displays the approval status for this alternate clause. You can add alternate clauses that are in the *Initial* or *Pending* status. The system uses this field for informational purposes and does not require an *Approved* 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.

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Rules

Select the Rules tab.

Use the Rules 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.

Use the Rule field to 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.

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 for use 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)
```

See Also

Chapter 9, "Managing the Contract Library," Understanding Document Clauses, page 276

Chapter 9, "Managing the Contract Library," Understanding Document Rules, page 287

Associating Clauses with Clause Groups

Access the Associate to Clause Group page (click the Associate to Clause Group link on the Clause Definition 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.

Adding Bind Variables to Content Fields

Access the Add Bind Variables to Content Fields page (click the Add Variables button on the Clause Definition page).

Bind Variable Displays the bind variable that you selected. You can create binds using the Bind Definition field and then map them to transaction records.

See Chapter 9, "Managing the Contract Library," Defining Bind Definitions, page 334.

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Bind Type 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:

Transactional: Select to display a list of variables that originate from a source transaction. These are nonwizard binds such as those related to the PeopleSoft Purchasing transactional contract or ad hoc binds.

Wizard: Select to display a list of bind variables that are used with the contract wizard.

Field Type Displays the type of field that you are adding to the clause. Field types define the structure of the data. Values are:

Date

Date/Time

Decimal

Integer

String

Yes/No

See Chapter 10, "Using the Contract Document Wizard," Defining Binds for Use in Contract Wizards, page 396.

Field Length Displays the field length of the bind that you are adding to the clause.

Title Select to include this bind variable in the Title field of the clause.

Full Text Select to include this bind variable in the Full Text field of the document clause.

By Reference Select to include this bind variable in the Reference Text field of the document clause.

Previewing Clause Approvals

Access the Clause Approval Status page (click the Preview Approval button or the Submit for Approval button on the Clause Definition page.

When you click the Preview Approval button, you can preview any approvers and reviewers and comments about the approval. The system displays a message if approvals are not required for the clause. After reviewing the approval stages and paths, you can submit the clause for approval. The Submit for Approval button also enables you to preview clauses before submitting them for workflow approval.

Click the Clause Definition link to return to the Clause Definition page.

See Also

Chapter 9, "Managing the Contract Library," Submitting Clauses for Approval, page 323

Chapter 17, "Approving Documents and Document Components," Approving and Reviewing Documents, page 671

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Submitting Clauses for Approval

Access the Clause Approval Status page (click the Submit for Approval button on the Clause Definition page).

Use this page to review approvers and reviewers, add ad hoc approvers or reviewers, and submit a clause for approval without using the Preview Approval button. When approvals are required, the system routes the approval notifications and sets the contract approval status to *Pending* after you submit the clause for approval.

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 have been met, the system sets the clause approval status to *Pending* and sends email and worklist routings to approvers in the first relevant steps based on approval configuration. The Clause Approval Status page displays the updated approval status.

Click the Clause Definition link to return to the Clause Definition page.

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.

See Also

Chapter 17, "Approving Documents and Document Components," Approving Documents, page 664

Defining Contract Sections

This section provides an overview of defining sections and discusses how to define sections.

Understanding Defining Sections

Use the Section Definition 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 purchase attributes within the contract. For example, information that is necessary for defining 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 the clauses in a single section. Sections are reusable and nested in document structures and can contain clauses, subsections, and rules. You can include sections explicitly or use inclusion rules on a document configurator. Sections are controlled by a 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.

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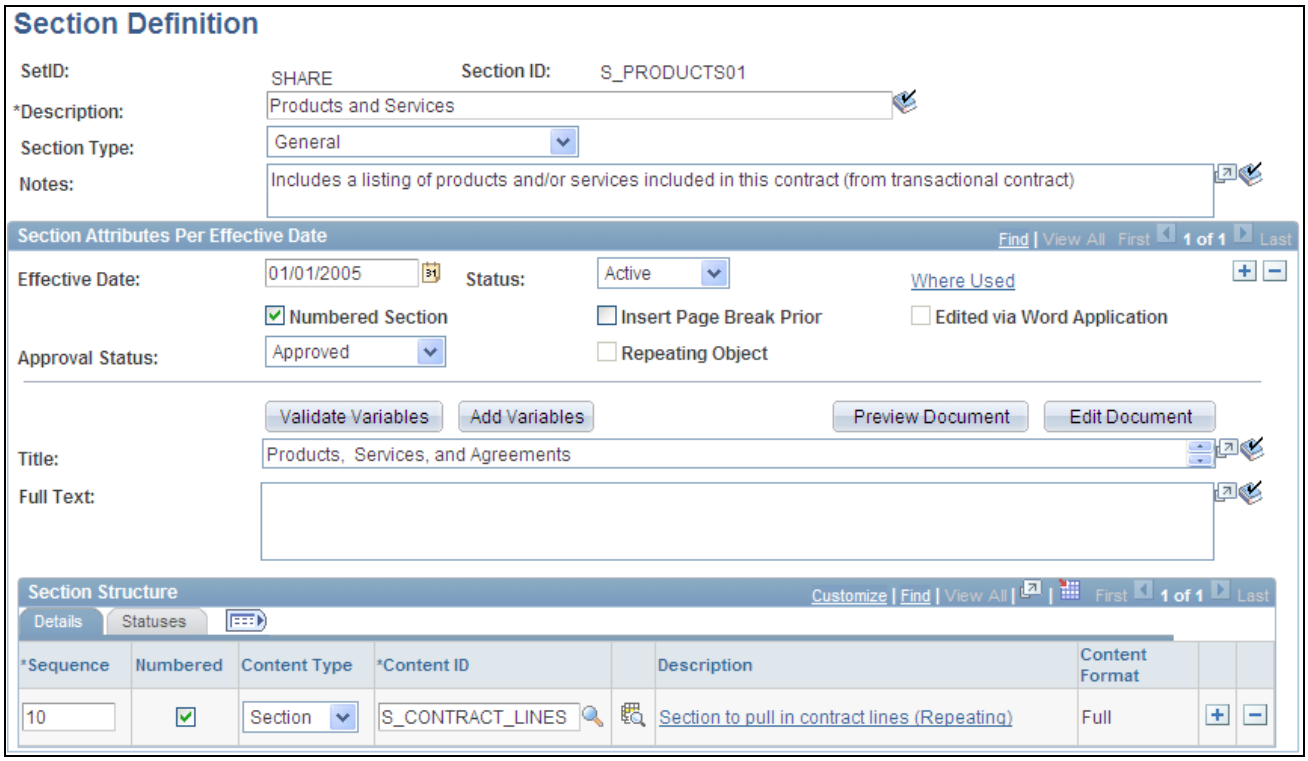
Pages Used to Define Contract Sections

Page Name	*Definition Name*	*Navigation*	*Usage*
Section Definition	CS_SECTION_DEFN	Supplier Contracts, Manage Contract Library, Sections	Define document sections.
Copy Information From	CS_OBJS_COPY_SP	Click the Copy From button on the Section Definition page.	Create a document section by copying it from an existing section. After you make the copy, you can incorporate new values into the section.

Defining Sections

Access the Section Definition page (Supplier Contracts, Manage Contract Library, Sections).



Section Definition page: Details tab

The Description field is required.

Copy From Click to access the Copy Information From page. The button is available when you are adding a section and enables you to copy an existing section to create a new section. When you click the button, the system provides a list of existing sections.

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Section Type

Select the section type that you want to use to organize and control document behavior. Available types are:

Amendment Placeholder: Select to identify this section as an amendment section placeholder. You cannot maintain amendment placeholder sections because they are shipped as metadata. The system uses the amendment placeholder to indicate where to insert the changes that you make to the amendment file and then select to automatically update the amended document during the document check-in process. The placeholder section contains added, updated, and deleted text for the main amended document.

General: Select to use this as an overall section throughout a document. You can use general sections alone or in conjunction with other sections, for example as subsections. *General* is the default value for the field.

Introduction/Title: Select to use this as an introduction section. You use introduction/title sections to identify document introduction sections, and they are useful if you intend to 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.

Note. 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, either SLA-HDR-PLACEHOLDER or SLA-LINE-PLACEHOLDER, for you when the bind value is referenced in a section content. The system prompts you to include this section in the section structure to gather and place any contract-specific agreement clauses in the document configurator using special logic. The system maintains these placeholder sections and you cannot modify them.

Notes

Enter comments that provide additional information about the section and its use. Notes are informational only and appear only on this page.

Effective Date

Select an effective date. Sections are effective-dated to enable you to keep a history of section text and approvals and to make future changes to existing sections without affecting existing section terminology that might already be in use for documents. During document generation, the system uses the start date of the contract to determine which sections to include in a document. As you introduce section changes, you should select an effective date that represents the effective-dated sections that you want to include in new contracts. When the system creates new effective-dated rows for the section, it assigns the new row an approval status of *Initial.*

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Status Select a status to assign to the section. The system requires the Status field with all effective-dated records in PeopleSoft Supplier Contract Management. For sections, this status is typically *Active*, even for sections that have not been approved.

When you need to deactivate a section or temporarily not use it in documents, you can set the status to *Inactive.* This status prevents the section from being included in new documents.

Edited via Word Application (edited using Microsoft Word application) This indicator displays whether the section has been checked out and edited in Microsoft Word. If the check box is selected and disabled, the document has been edited. This setting indicates that you may have rich text associated with the section that would be lost if you were to make edits directly using this page. If you attempt to edit the document, the system displays a warning.

Where Used Click to identify where this section is used in document configurators. Using the where-used search results, you can perform additional where-used searches. For example, this enables you to determine which documents have been generated using the document configurator that contained this section.

Numbered Section Select to indicate that this section title should be numbered according to the default numbering style when you preview or generate a document. The check box is selected as the default value.

Note. The system determines the numbering of clauses in a section preview by using paragraph styles and outline numbering that is defined in the default Microsoft Word template for the setID. The system determines the numbering of the content within an authored document by using the Microsoft Word template that is associated with the document configurator.

Insert Page Break Prior 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.

Repeating Object Indicates whether this section is repeating in nature. You do not enter this section attribute. The system derives the value based on the bind variables that are included in the section. If the system includes a bind variable that repeats, such as *%%Item ID%%* (level one), in the section title or text, it selects this check box. The Repeating Object check box is typically deselected for most sections. But because special rules and edits can be applied as repeating objects, identifying when an object is repeating is helpful.

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Approval Status Select an approval status. Unlike clauses and documents, sections do not use the PeopleSoft Approval Framework for approval processes. You can set the approval status as long as you have authority to do so. The system validates the setting before it changes the section to the *Approved* status. Automated approvals can be defined for librarians using the User Preferences page.

Valid statuses are:

Approved: Select to make the section available for use in generated documents. 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.*

Initial: Select to indicate that the section is not ready for use. This is the default setting when you create or make changes to the section.

Validate Variables Click to call validation routines to verify that bind variables in the section exist and that they are being used correctly in case repeating binds exist. This functionality is the same as saving the section, except that validating bind variables enables you to verify the section's binds for use without saving the section.

If errors occur with the validation, the system populates the Errors grid with the issues.

Add Variables Select to access the Add Bind Variables to Content Fields page, where you can define bind variables for this section.

See Chapter 9, "Managing the Contract Library," Adding Bind Variables to Content Fields, page 321.

Preview Document Click to open the section in a read-only mode using Microsoft Word. During the preview, the system applies paragraph style formatting from the Microsoft Word template that is defined for the setID.

Note. Numbered section previews always start at the first number in the Microsoft Word numbering scheme; however, when the system generates the final document, the numbering changes based on positions in the document.

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Edit Document

Click to edit section content using Microsoft Word. Before editing documents, you should understand the functionality of Microsoft Word and its integration with the PeopleSoft application to better help you create the contract library.

See Chapter 9, "Managing the Contract Library," Clause Text Editing, page 278.

When you click this button, the system displays the Checked Out By and Checked Out On fields and creates a Microsoft Word document that includes the title, full text, and reference text fields. You must save this file to the local client system using Microsoft Word 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 section that you are editing as part of the file name.

While you can apply custom formatting using Microsoft Word, you should use the Microsoft Word template and paragraph styles for format processing during document preview and generation. Doing so provides a consistent format of numbering and content for finished documents.

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

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 at times 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.

See Appendix A, "Microsoft Word Integration with Supplier Contract Management," page 701.

Checked Out By

Displays the user ID that is editing the section.

Checked Out On

Displays the date on which the section was checked out for editing.

Cancel Checkout

Use this button to cancel the checkout of a clause without checking in any changes.

Note. If you saved a local version of the section, it remains on the local client system.

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Check In 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 for the section. When you click Check In, the system provides an Upload page with Browse, Upload, and Cancel buttons.

1. If you know the exact location and file name of the section, enter it and click Upload. If you don't know the location, click the Browse button.
2. Click Browse to locate the section that you checked out.
3. Double-click the file to select it.

   The system displays an Upload button.
4. Click the Upload button to upload and check in the section.

Note. The system validates the file that you try to upload to ensure that it is an XML file and that it has embedded keys identifying it as the section that was originally checked out.

Title Enter descriptive text that identifies the section's content.

Full Text Enter the text to use for a section. You can specify either full text or reference text, but not both, when a section is referenced in the system for use on, for example, 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.

Sequence Enter a number that orders content in the section. When the system processes the Microsoft Word document, it sequences the elements based on the value that you enter here. You do not have to enter sequential numbers because the system will order the elements for you when you click the Sequence column heading.

Numbered Select to make the content within the section numbered as well. The check box is available when you select the Numbered Clause 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.

If you select the Numbered Section check box, then you can decide whether you want to continue that numbering for content within the section. You can define which content 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.

Note. The system determines the numbering of clauses during a section preview by using paragraph styles and outline numbering that is defined in the default Microsoft Word template for the setID. The system determines the numbering of the content within an authored document by using the Microsoft Word template that is associated with the document configurator.

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Content Type Select the type for the section element content. Sections can comprise several elements to form a complete document. After you select the content type, use the Content ID field to select a specific element. Values are:

Clause: 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.

Rule: 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 generated document.

Section: Select to use another section as a subsection of this section.

Description Click to access the page that describes this element of the section.

Content Format Select the text type to include in this clause or section. Values are:

Full: Places the entire element in the Full Text section of this section.

Reference: Places a reference in the By Reference section.

Statuses

Select the Statuses tab.

Use this tab to view the effective status and approval status of the section's elements based on the effective date of the section itself. This tab helps you understand the availability and current state of the section's elements. For example, if someone is updating an element, you can use this tab to ensure that the entire section is stable for use.

The Effective Status field values are *Active* and *Inactive.* If an element is inactive, you cannot use it to form the structure of a document.

The Approved Status field values are *Initial,Approved,* and *Pending.* Unless an element is approved, the system does not include it in the generated document.

Note. Although the system bases the section status that appears here on the effective date of the section itself, 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.

Setting Up Contract Rules

This section provides an overview of rules establishment and discusses how to establish rules.

See Also

Chapter 9, "Managing the Contract Library," Understanding Document Rules, page 287

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Understanding Rules Establishment

Use this page to define rule definitions, criteria, and the content to include when the rule is true. 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 any 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 a 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 during document generation and refreshes.

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 in rules and to create combinations of query-types, statements, or both in the rule criteria. As a default value, the system formats the basic criteria as the page setup. To define advanced criteria, click the Show Advance Criteria button. To return to basic criteria, click the Show Basic Criteria button.

Pages Used to Set Up Contract Rules

Page Name	*Definition Name*	*Navigation*	*Usage*
Rules	CS_RULES	Supplier Contracts, Manage Contract Library, Rules	Establish rules.
Copy Information From	CS_RULE_COPY_SP	Click the Copy From button on the Rules page.	Create a rule by copying it from an existing rule. After you make the copy, you can incorporate new values into the rule.

Establishing Rules

Access the Rules page (Supplier Contracts, Manage Contract Library, Rules).

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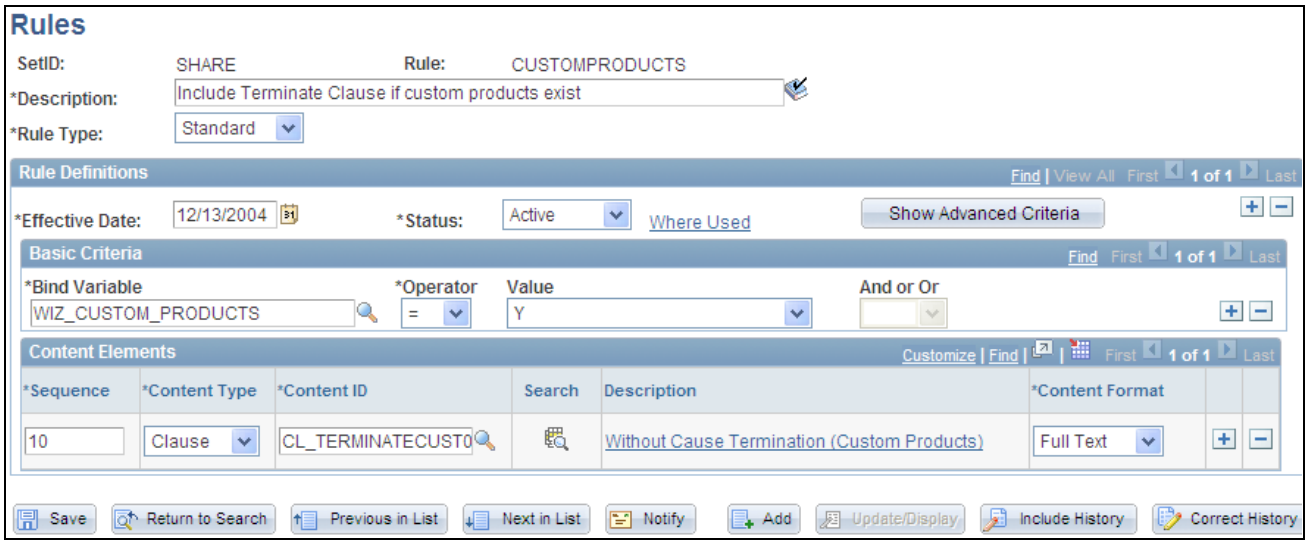

Rules page

Copy From Click to access the Copy Information From page. The button is available when you are adding a 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.

Rule Type Select a value that determines how the system uses the rule. Values include:

Standard: Select to use this rule with any section or configurator. This is the default value for new rules.

Alternate: Select to indicate that the rule is tied to an alternate clause. The system defines the alternate clause to include for alternate rules on the parent clause and not within the rule itself.

Basic Criteria

Use this grid 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. During document generation or refreshes, 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.

When more than one row of criteria exists within basic criteria, the system can evaluate all rows using *and* or *or* statements. Therefore, all rows of the criteria must evaluate as true for the rule to be true for the *and* statement. For the *or* statement, if any of the rows of criteria evaluate as true, then the rule is true for the *or* condition.

Advanced Criteria

Use this grid to define advanced criteria for a rule. Advanced criteria enable you to define more complex sets of criteria. You can use advanced criteria when situations arise in which the basic criteria for a rule is not sufficient. Advanced criteria enable you to place open and close parentheses around one or more criteria and also enables you to use both the *AND* and *OR* constructions when needed.

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Open 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.

Bind Variable Select a bind variable that defines a procedure for retrieving field values from a record. The variable that you select determines the field type that you must use in the Value field.

Operator 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 Value field. For example, suppose that you want to place amounts from the record that are equal to or greater than 100,000 in the document. You use the => operator and enter *100000* in the Value field. You should enter the correct form of the criteria to match the operation that you want the system to perform.

Values are:

<: Include values that are less than the value that you enter in the Criteria field.

<=: Include only values that are less than or equal to the criteria.

<>: Include values that are not equal to the value that you enter in the Criteria field.

=: Include only values that are equal to the criteria.

>=: Include values that are equal to or greater than the criteria.

>: Include values that are greater than the criteria.

Value Enter the value to use when applying the operators. For example, if you select >= for an item description field and enter *100000* as the criterion, then the system includes only values that are equal to or above that value.

Close 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.

AND or **OR** Select *AND* or *OR.* This field enables you to create or modify statements for the operators and criteria that you enter. Select *AND* to create additional criteria and apply a logical *and* between the rule criteria. Select *OR* to create a logical *or* between the rule criteria.

Content Elements

Use this grid to select document elements to which you want to attach standard type rules. This grid appears only for standard rules. After you create alternate rules, the system adds them directly to the dependent clause in the Clause Definition component. Clauses in this grid do not apply alternates.

Sequence For standard rules, enter the sequence in which the system should add sections and clauses during document generation.

Content Type Select either *Clause* or *Section.*

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Content ID Select the clause or section.

Content Format Determines which content to include for a clause, either full text or reference text. For sections, the content format is always *Full*.

Defining Bind Definitions

This section discusses how to:

- Search for where binds are used.
- Set up bind definitions.

Pages Used to Define Bind Definitions

Page Name	*Definition Name*	*Navigation*	*Usage*
Search for All Content Instances	CS_CONTENTS_XREF	Supplier Contract, Manage Contract Library, Binds Click the Where Used button on the Bind Definition page.	Search for where binds are used.
Bind Definition	CS_BIND_DEFINITION	Supplier Contract, Manage Contract Library, Binds	Set up bind definitions.

Searching for Where Binds Are Used

Access the Search for All Content Instances page (Supplier Contract, Manage Contract Library, Binds and click the Where Used button on the Bind Definition page).

This page displays all the bind variables that are defined for contracts. The system uses *Bind Variables* as the default value to perform the search when you select Where Used on the Bind Definition page.

To view or maintain a bind variable usage, click the value in the Description field. You use binds in clauses, sections, and question groups.

See Also

Chapter 14, "Searching for Library and Document Contents," Where-Used Searches, page 594

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Setting Up Bind Definitions

Access the Bind Definition page (Supplier Contract, Manage Contract Library, Binds).

Bind Definition page

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.

Bind Variable 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. The format for the bind variable is string/date/number.

Bind Type Select how to use the bind variable. Depending on the type of bind that you select, available field types will vary.

Values are:

Transactional: Select if you want this bind used with transactional events for which the data values come from contract transactions. The system uses a contract and values contained in its fields to replace the variable that you define.

Wizard: Select if you want to use this bind with a contract wizard. When the system processes a wizard bind, it replaces the variables with user-defined default values.

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Field Type

Select a value that determines the method by which data is stored in the field. When the system finds a bind during document generation, it replaces it and uses the type of value that you define. Bind values are:

Checkbox: Select to create a check box within a question group. The check box has two values (Y or N) and is available only for wizard-type binds. The wizard groups check box questions together until it encounters a non check box bind field type. The system uses a blue separator line to group questions together. The check box bind is most useful when enabling users to make multiple selections quickly in a related group.

Date: 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 document.

Date/Time: Select to use a date and time in the document when the system resolves the bind.

Decimal: Select to use a decimal to represent the contract value. When you select the Decimal value, the system displays the Currency Code check box and the Number of Decimalsfield. You use the Currency Code check box to indicate that you want to use the decimal setting for the currency code associated with the source transaction that uses the bind variable. This check box is not available for wizard bind types. You use the Number of Decimals field to define the decimal positions for transactional and wizard type binds. A number display provides an example of the decimal placement.

Integer: Select to use an integer to represent the contract value.

Prompt Table: Select to enable the use of prompt tables on a bind variable by specifying predefined tables that can be assigned to a specific bind and then accessed from the wizard. Prompt tables are primarily for ad hoc document generation for which certain values cannot be easily derived from a source transaction, and thus you must be prompted for them. These values are limited to basic codes (no vendor or items) and use simple keys or at most, setID-driven keys. After the system stores the value in the bind, the prompt can be used in rules the same as other variables.

In addition to the prompt tables supplied with PeopleSoft Supplier Contract Management, you can define prompt tables for use in binds.

String: Select to have the system enter the text string that is defined for the bind. When you select this value, the Field Length field appears. String wizard bind variables enable additional mask edits.

Yes/No: 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.

See Chapter 9, "Managing the Contract Library," Understanding Bind Variables, page 289.

Currency Code

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 Decimal field.

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Number of Decimals Enter the decimal places that you want to use for decimal values in transactional and wizard bind types. You use decimal places for numbers and can assign up to eight positions. The system displays an error message if you enter a number greater than eight. When an author enters a value using the wizard, the system validates that the value entered is numeric. During document generation, the system reformats the precision based on the decimal precision that you enter here.

The system truncates numeric values to the precision specified for both wizard and transactional decimals. You can change the decimal precision when the bind variable is in use, but the change will not be reflected in any existing documents unless you regenerate those documents.

Display Format Select the format that you want the system to use when it displays date and time information when you select either the *Date* value or the *Date/Time* value in the Field Type field. For example, if you use a date and time field type, you might display the time and date as 31/12/2005 at 11:59 PM or as December 31, 2005 at 11:59 PM.

Field Length Select the number of characters to which you want to limit the length of this field. This field is available when you select *String* in the Field Type 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 String Format field. This field appears when you select to use a string character length between 2 and 30. You can also select to use long-character binds that will enable you to add large paragraphs to an ad hoc or a purchasing contract document through the wizard. Select *Long Char* to use this feature.

Prompt Table Select a prompt table for use with this bind variable. This field appears when you create a wizard bind with a Field Type value of *Prompt Table.* These tables are predefined tables that you can assign to a specific bind and then access from the wizard. Prompt tables are primarily for ad hoc document generation for which certain values cannot be easily derived from a source transaction. Using a prompt table enables document authors to be prompted for a valid value.

String Format Enter a value that serves as a mask for the format that you want to use. You use this option only with wizard binds. Masking enables you to enter a specified format using special characters so that when bind is resolved within a document, it is formatted correctly as opposed to typing a specific value such as a 1,000,000 USD contract value. You can enter currency formats for numerics and specify currency symbols, phone and 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 with a length that is less than 30 characters and that has a mask value specified.

Defining Document Configurators

This section discusses how to:

- Search for document configurators.

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- Define basic configurator information.
- Add multiple elements to document configurators.
- Add single elements to document configurators.
- View and maintain configurator structures.
- View rules used in document configurators.
- Validate document configurators.
- Preview document configurators in Microsoft Word.
- Associate document configurators with configurator groups.

Pages Used to Define Document Configurators

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Configurator Definition (search)	CS_TMPL_COPY_SEC	Supplier Contracts, Manage Contract Library, Document Configurators	Search for document configurators.
Document Configurator Definition	CS_TMPL_TBL	Supplier Contracts, Manage Contract Library, Document Configurators	Define basic configurator information. View and maintain configurator structures. Validate document configurators. Preview document configurators.
Copy Document Configurator From	CS_TMPL_COPY_SEC	Click the Copy From button on the Document Configurator Definition page.	Create a document configurator by copying values from an existing configurator. After you make the copy, you can incorporate new values into the configurator.
Select and Add Clauses or Sections to Document Configurator	CS_CONTENTS_SEARCH	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.	Add multiple elements to document configurators. Use the Add Multiple Objects button to insert more than one clause or section into the document configurator structure.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Insert a Content Row	CS_TMPL_ADD_SEC	Click the Insert button in the Content Elements grid on the Document Configurator Definition page.	Add single elements to document configurators. Use the Insert button to insert a single clause, section, rule, or ad hoc clause element.
Rules	CS_TMPL_RULE_SEC	Click a rule link in the Content Elements grid on the Document Configurator Definition page.	View rules used in document configurators.
Associate to Configurator Groups	CS_TMPL_ASSOC_GRP	Click the Associate to Configurator Groups link on the Document Configurator Definition page.	Associate document configurators with configurator groups.

Searching for Document Configurators

Access the Document Configurator search page (Supplier Contracts, Manage Contract Library, Document Configurators).

Use this page to locate existing document configurators. You can search by a setID or search for a specific configurator. You can also search for configurators that are within a configurator type, an availability status, and based on a specific source transaction for which the configurator is used.

After you define the search criteria, click the Search button to retrieve the search results.

Wizard ID Select a wizard for which you want to search for document configurators. The results provide configurators that use the selected wizard.

Use for Amendments Select to search for configurators that are designated for use with amendments. The returned results contain configurators that are used with amendments and that also meet other selection criteria.

Use for Executive Summary Select to search for configurators that are designated for use as an executive summary. The returned results contain configurators that are used with amendments and that also meet other selection criteria.

Defining Basic Configurator Information

Access the Document Configurator Definition page (Supplier Contracts, Manage Contract Library, Document Configurators).

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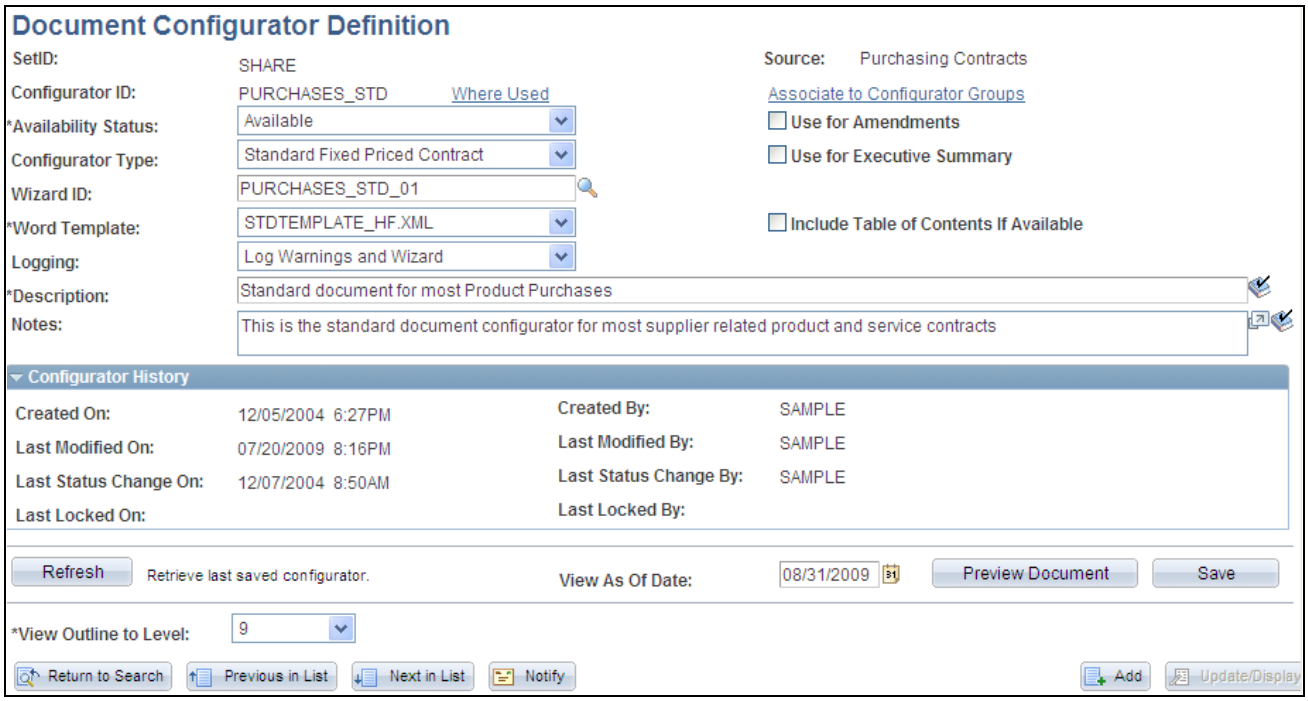
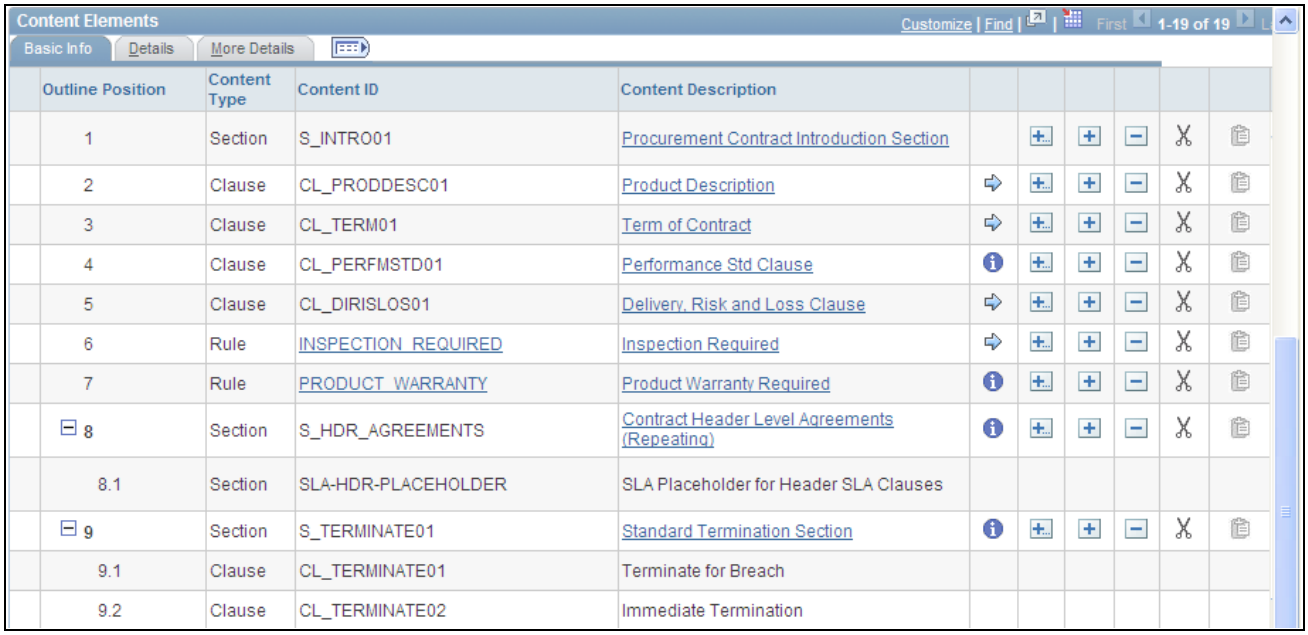


Document Configurator Definition page: Basic Info tab (1 of 2)



Document Configurator Definition page: Basic Info tab (2 of 2)

Use this page to build a collection of sections, clauses, or rules that make up the overall structure and wording of a 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.

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See Chapter 11, "Importing Clauses, Sections, and Documents," Creating a Document Configurator During Object Import, page 421.

Copy From

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.

Availability Status

Select a status for the configurator. This selection changes the state that represents the current status of the configurator. 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 Change Configurator Status check box on the User Preferences page.

Values include:

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. Make sure that you save the configurator to activate the status.

In Progress: Select to remove the configurator from general use when you are creating documents. You might want to do this if you are redefining configurator values. *In Progress* is the default value when you create the configurator. The configurator remains in progress and is unavailable for use until you select *Available.*

Obsolete: Select to indicate that this 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 open an obsolete configurator and set it to the *Available* status for document use.

Configurator ID

Displays the configurator that you selected. If you are adding a configurator, enter a unique identifier.

View As Of Date

Displays the clause, section, and rules content status as of this date. The system uses today's date as the default value. When you preview a document button, the system selects content based on the date that you enter in the View As Of Date field. This functionality can be useful when determining what format and static approved content (rules are not exploded) would be included for contracts that are generated as of this date. When you change the View As of Date field, the system clears the details of the configurator until you select to refresh or preview the document again. The system also provides a warning if previous changes have not been saved.

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Source Transaction

Select the type of source transaction for which you want to use this configurator. You can select *Ad Hoc,Multiple Sources, Purchase Orders,* or *Purchasing Contracts.*

The source transaction determines which templates can be used for which document types. For example, you can generate an ad hoc document using an ad hoc configurator only. 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.

The *Multiple Sources* field value enables you to define a configurator that you can use for ad hoc, purchase order contracts, and purchasing contacts. After you add a configurator using multiple sources as the source transaction, you can use the Applicable Sources grid to select which source transactions to use with the configurator.

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 could not resolve this bind. Rules can be useful in this scenario. You can use rules to evaluate the documents source transaction first, then depending on its source when you create the document, then include additional content specific to the source that is being generated.

Note. You can use wizard bind values in configurators for both ad hoc and purchasing contract source transactions.

Log at Document Generation

Select how the system logs warnings during document generation. The system inserts a default value in the field based on the settings that are defined for PeopleSoft Supplier Contract Management installation options. You can override the value.

Select *Details* 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 the wizard responses. This option is useful for evaluating and debugging a configurator when you add a new configurator using wizards and rules.

Note. Using the Details log requires more time to process if you are generating a document from a large and more complex configurator.

Select *Log Warnings and Wizard* to log important warnings during document generation as well as an audit log of wizard responses for the document that is generated. After placing a configurator into production, you should use this logging option for larger and more complex document configurators.

Use for Amendments only

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.

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Configurator Type

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.

Use for Executive Summary

Select to use this document configurator specifically as an overview of the contract. An executive summary is a supplemental document that summarizes the contract. 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.

When you create a document using this feature, the system provides executive summary buttons where you can add a related document that summarized contract information. Using the Document Management page you can view, edit, and refresh the summary. Executive summary documents are not version controlled as is the main document. For executive summary documents, you can maintain only one current version of the summary.

Note. The system does not log executive summary history.

Associate to Configurator Groups

Select to access the Associate to Configurator Groups page, where you can link this configurator to a group. Use configurator groups 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 configurator use.

Wizard ID

Select a contract wizard to use with this configurator. Wizards are predefined sets of questions that assist you in 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.

Note. Although two types of wizards are available in PeopleSoft Supplier Contract Management, only document creation wizards are available when you define a configurator. Configurator selector wizards are for use in document types to guide authors to the appropriate configurator.

See Chapter 12, "Generating Microsoft Word Documents," Viewing Document Generation Logs, page 453.

Word Template

Select a Microsoft Word template on which to base this configurator. The 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 Document Format and Options page.

See Appendix A, "Microsoft Word Integration with Supplier Contract Management," Templates, page 711.

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Include Table of Contents If Available

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 build the contents. 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.

Description

Enter a value that describes the use of this document configurator. The system displays the description along with the configurator ID and uses the Description field as a search option. This field is required.

Notes

Enter free-flow text to use as further instructions or comments about the use of the configurator. The text is not a part of the document configurator itself, but provides easy-to-access instructions to the contract officer about the document configurator's use.

Refresh

Click to retrieve the last-saved document configurator content. When you initially open the configurator, the Content Element grid does not appear with the configurator elements. When you click the Refresh button, the system displays the full document structure.

Note. You must define and save the configurator before you refresh it.

Refresh does not save changes. The system reminds you to save when you click Refresh and if you have made changes to the configurator but not saved them.

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Preview Document

Click to open the Microsoft Word version of the document. 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 any styles that are defined for content within the previewed document similar to how it will appear for the generated version of the document. This document is not intended for editing. Instead, it provides a preview of included content based on the View As Of Date field value for the configurator.

When you preview the document, the system highlights unapproved configurator content that is not controlled by rules. This content can include clauses and sections that are not yet approved and that are listed directly on the configurator. The system uses the View As Of Date field value on which to base the approval. For example, pending clauses might appear during the preview, but the system could exclude their versions from document generation later based on the same configurator and date. This functionality provides more visibility into any issues with content approval statuses.

Rules and their content are not exploded as part of 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.

The system displays bind values as the variable itself in preview mode. The value appears as (%%VARIABLE%%) in the Microsoft Word preview document.

The system displays any repeating content, such as repeating clauses or sections, when it is in the document. Multiple instances of the content are not repeated within the Microsoft Word preview document.

Save

Click to update the document configurator with any changes that you have made. The system validates elements that are included in the configurator structure when you save the configurator. It also produces messages about problems with building the document. You must resolve the problems to successfully update and save the configurator.

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View Outline to Level Select the level at which you want to view the document outline. The document configurator controls the elements of a document. You use the Content Elements grid to populate the outline and the Outline Position column to view the levels of an outline. You can view up to nine levels.

Note. 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 documents. 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.

The following example shows how a document configurator outline might appear with four levels:

```
1.
 1.1
  1.1.1
   1.1.1.1
```

If you limited the outline view level to two, the outline might look like this:

```
1.
 1.1
 1.2
 1.3
2.
 2.1
 2.2
```

See Chapter 9, "Managing the Contract Library," Adding Single Elements to Document Configurators, page 348.

Applicable Sources

Use this grid area to select a combination of transaction sources that you want to use this configurator. You can select all three sources, but must select at least one source if you are using multiple sources as the transaction type. When you save the configurator, the system validates the objects you have linked to the configurator and the applicable sources that you selected. So, you can only attach common clauses, sections, and rules to the configurator.

You can create rules based on source transaction values that you can place into specific sections and clauses based on source to that you can have variations in the configurator. In addition, when you search against configurator template IDs, the system retrieves any multiple source configurators that has the applicable source check box selected.

Ad Hoc Click to use this configurator to create ad hoc documents along with any other source type that you select.

Purchase Order Click to use this configurator to create purchase order documents along with any other source type that you select.

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Purchasing Contract Click to use this configurator to create purchasing contract documents along with any other source type that you select.

Configurator History

Use this expandable grid area 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

The Content Elements grid displays elements that make up this configurator. You can build a document configurator structure by clicking the insert buttons in the right side of the grid.

The next several sections describe the use of this grid and how you build the configurator.

Adding Multiple Elements to Document Configurators

Access the Select and Add Clauses or Sections to Document Configurator page (click the Add Multiple Objects button on the Document Configurator Definition page).

Use this page to search for and find multiple clauses or sections for use in the document configurator structure. You can add multiple clauses or sections at the same time, which facilitates organizing and building the structure.

Note. Verity searching must be enabled and the Verity search collections built and kept up to date for this page to contain the most accurate information. To add single elements, including ad hoc clauses, clauses, rules, and sections, click the Insert button in the Content Elements grid.

Note. When you are adding single elements, the system does not use the Verity search.

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 any text to use for the search.

   You can also use the text search options to further 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.

4. Click the Search button.

   The system displays the search results.

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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.

   Note. When you use the Verity search feature 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 to add to the document configurator. The Chunk Size field on the Installation Options page controls the number of lines that are returned by the Verity search. Large chunk size values can result in performance issues.

6. Click the OK button.

   The system populates the structure with the selections.

Adding Single Elements to Document Configurators

Access the Insert a Content Row page (click the Insert button in the Content Elements grid on the Document Configurator Definition 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, the system loads the selection into the configurator structure. To add multiple clauses and sections at the same time, click the Insert Multiple Objects button. This multiple object search relies on Verity searching.

Use the Content Type field to select one of these types to insert into the structure:

- *Ad Hoc Clause:* Select to insert ad hoc text that you can copy or compose immediately and that does not require approval as a clause would. You use ad hoc clauses mainly for transitional text; they are simpler than regular clauses because they do not support bind variables within them. When you select to insert an ad hoc clause, the system updates the Content ID 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 Numbered Clause check box to indicate that the clause should be numbered.

- *Clause:* Select to add a single clause to the document configurator structure. When you select to insert a clause, the system provides the Content ID field for you to perform a clause search.

  The system also provides the Content Format field for you to select the type of content format generation to use for the clause. Select *Reference* 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. Select Full to use the full text of the clause.

  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.

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- *Rule:* Select to add a single, standard rule to the document configurator structure. 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 and or sections in specific locations of the document. The rule can evaluate wizard or transactional bind variables and determine, for example, based on an author's response to wizard question, whether an additional clause should be included.
- *Section:* Select to add a single section to the document configurator structure. 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.

Viewing and Maintaining Configurator Structures

Access the Document Configurator Definition page (Supplier Contracts, Manage Contract Library, Document Configurators).

Use the Content Elements grid to build, maintain, and view details about the configurator structure. This structure represents a document.

Outline Position Displays a simple numbered position within the outline for this configurator element. The position shows the order and level of indentation only. The system bases the final generated document's outline on the style and formatting that is defined by the Microsoft Word template and the paragraph styles that you defined using setup pages. This style and formatting can be different from the configurator outline. The configurator outline provides you with a basic outline while the generated document applies the actual styles and formatting.

Bold characters in the column represent elements with 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 View Outline to Level field.

Content Type Displays the type of element that makes up this portion of the document configurator. Types can include sections, clauses, ad hoc clauses, or rules. Often, an element is embedded within another element. When you insert a section or clause containing dependent clauses, the system displays the child elements within the configurator, but you cannot indent or outdent them separately because the rows are linked to the parent section or clause.

Also, 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.

Note. You can include an 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 that the system inserts the results of the comparison between the last executed contract and recent edits to the main amended contract.

Content ID Displays the identifier for the configurator element.

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Content Description

Displays the description that applies to the element. 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.

Indent Row

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.

See Appendix A, "Microsoft Word Integration with Supplier Contract Management," Format and Style Considerations in Microsoft Word, page 710.

For example, 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. So 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.

This example of the initial outline shows how the system indents according to the previous description:

```
1.
 1.1
 1.2
2.
 2.1
 2.2
```

After you click the right arrow, the outline appears like this:

```
1.
 1.1
 1.2
 1.3
  1.3.1
```

After moving the element, the system changes the left arrow to a right arrow.

Outdent Row

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.

For example, 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.

After moving the element, the system hides the right arrow if the element can move no further to the right. You can indent to a maximum of nine levels.

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Information	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 the Information 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.
Add Multiple Objects	Click to add more than one section or clause. See Chapter 9, "Managing the Contract Library," Adding Multiple Elements to Document Configurators, page 347.
Insert	Click to add a single ad hoc clause, clause, rule, or section. See Chapter 9, "Managing the Contract Library," Adding Single Elements to Document Configurators, page 348.
Delete	Click to remove a document element from the contents. When you select to delete an element, the system does not copy it for future pasting and the deletion is immediate.
Cut Row	Click to cut and copy an element. After cutting an element, you can click the Paste Row button 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 Delete button.
Paste Row After	Click to paste a content element row. You must cut a row before you use the Paste button. The content row and its children will be pasted into the document below the row to which you select to paste the contents.

Details

Select the Details tab.

Use this page 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.*

More Details

Select the More Details tab.

Use this page to view approval and content statuses for document configurator elements. Also, you can view whether the content approval status is *Initial*,*Pending,* or *Approved,* whether the content status is *Active* or *Inactive,* and the content effective date. The approval status for content is for the effective-dated clause or section. The system bases the effective-dated content on the View As Of Date field value.

The Level field 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.

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The Protect field indicates whether the content element is protected when the document is being edited. The field is display-only and the setting is defined on the Clause Definition page.

Viewing Rules Used in Document Configurators

Access the Rules page (click a rule link in the Content Elements grid on the Document Configurator Definition page).

Rules page

Use this page to review the details of a rule associated with the document configurator. The rule can be associated directly with the document configurator or be associated to a section. The system uses the effective date based on the value in the As of Date field on the Document Configurator Definition page. The open and close brackets appear only if at least one of the criteria in the rule uses brackets in its definition. The Content Elements grid box displays the contents that are for the selected effective date of the rule.

Bind Variable Displays a variable that defines a procedure for retrieving field values from a record.

Operator Displays the 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 Value field.

Value Displays the value that the system uses when applying the operators. A value might be less than or equal to (<=), for example.

And or Or Displays whether this rule contains an and/or statement that creates or modifies statements for the operators and criteria defined for the rule.

Question Mapping If a bind variable exists in a wizard, the system displays the wizard question and when it creates and refreshes the document, populates the bind. If a variable is a transactional bind, the system displays the record and field and level associated with the transactional bind.

Question Group Displays the question group in which the rule is used.

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See Also

Chapter 9, "Managing the Contract Library," Setting Up Contract Rules, page 330

Validating Document Configurators

Access the Document Configurator Definition page (Supplier Contracts, Manage Contract Library, Document Configurators).

After completing a structure or a portion of the structure, click the Save button. The system performs validation routines to 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/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.

See Also

Chapter 9, "Managing the Contract Library," Understanding Document Configurators, page 302

Previewing Document Configurators in Microsoft Word

Access the Document Configurator Definition page (Supplier Contracts, Manage Contract Library, Document Configurators).

Use the Preview Document button to open a read-only version of the Microsoft Word document for a configurator. Previewing a configurator enables you to view a document representation similar to how it would appear if it were a Microsoft Word document. Previewing a configurator; however, does not resolve bind variables. That is, the system does not expand rules or repeating objects that would be resolved during document generation.

Previewing a configurator also enables you to view a representation of the document before saving any configurator changes. This preview enables you to view configurators based on the View As Of Date field value on the Document Configurator Definition page. You can simulate included content as of the start date of the transactional contract or ad hoc document.

Associating Document Configurators with Configurator Groups

Access the Associate to Configurator Groups page (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 assists you in organizing and searching for configurators.

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See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up Document Configurator Groups and Types, page 250

Setting Up Document Types

To set up document types, use the Document Types (CS_DOCUMENT_TYPE) component.

This section discusses how to define document types.

Pages Used to Set Up Document Types

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Type	CS_DOCUMENT_TYPE	Supplier Contracts, Manage Contract Library, Document Types	Define document types.
Copy Information From	CS_DOCTYP_COPY_SEC	Click the Copy From button on the Document Type page.	Copy an existing document type to create a new document type.

Defining Document Types

Access the Document Type page (Supplier Contracts, Manage Contract Library, Document Types).

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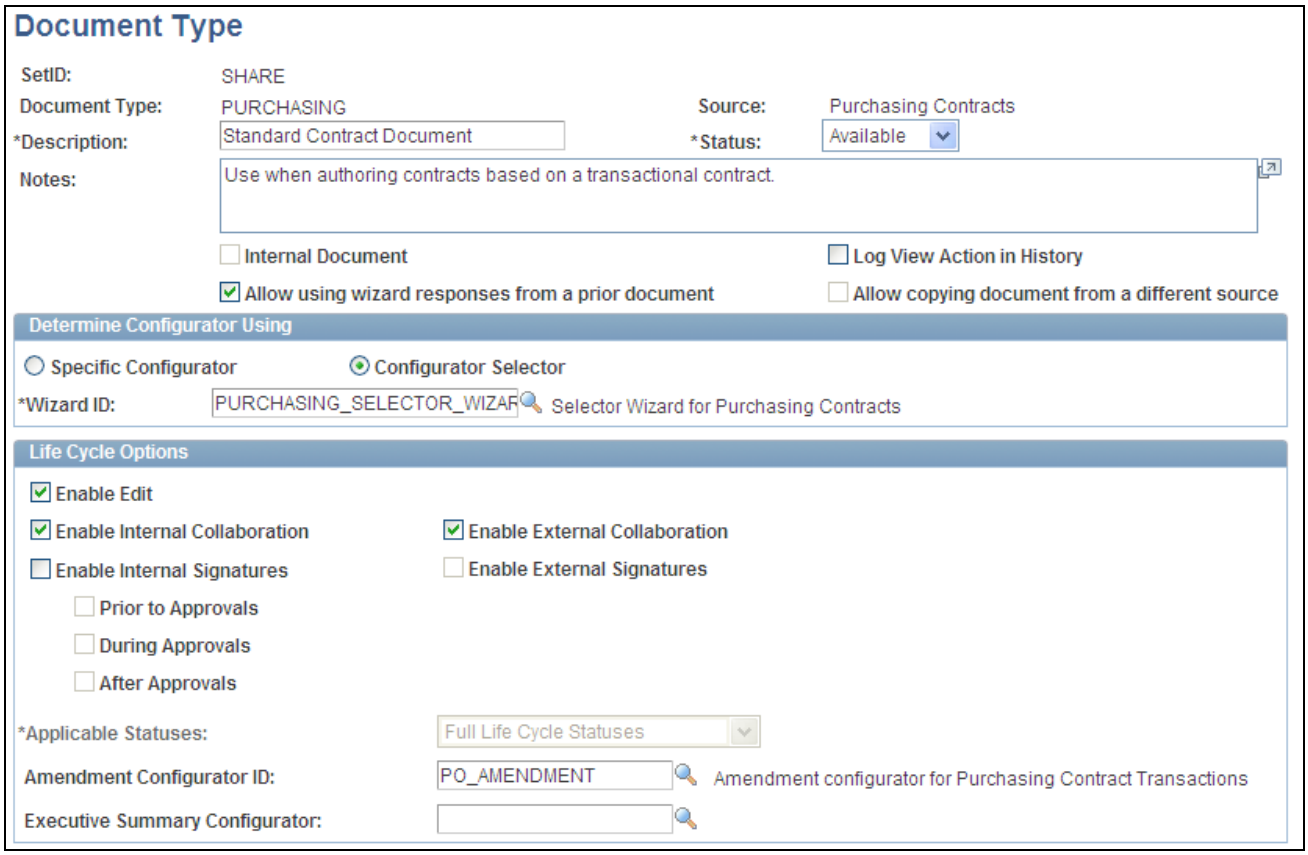

Document Type page (1 of 3)

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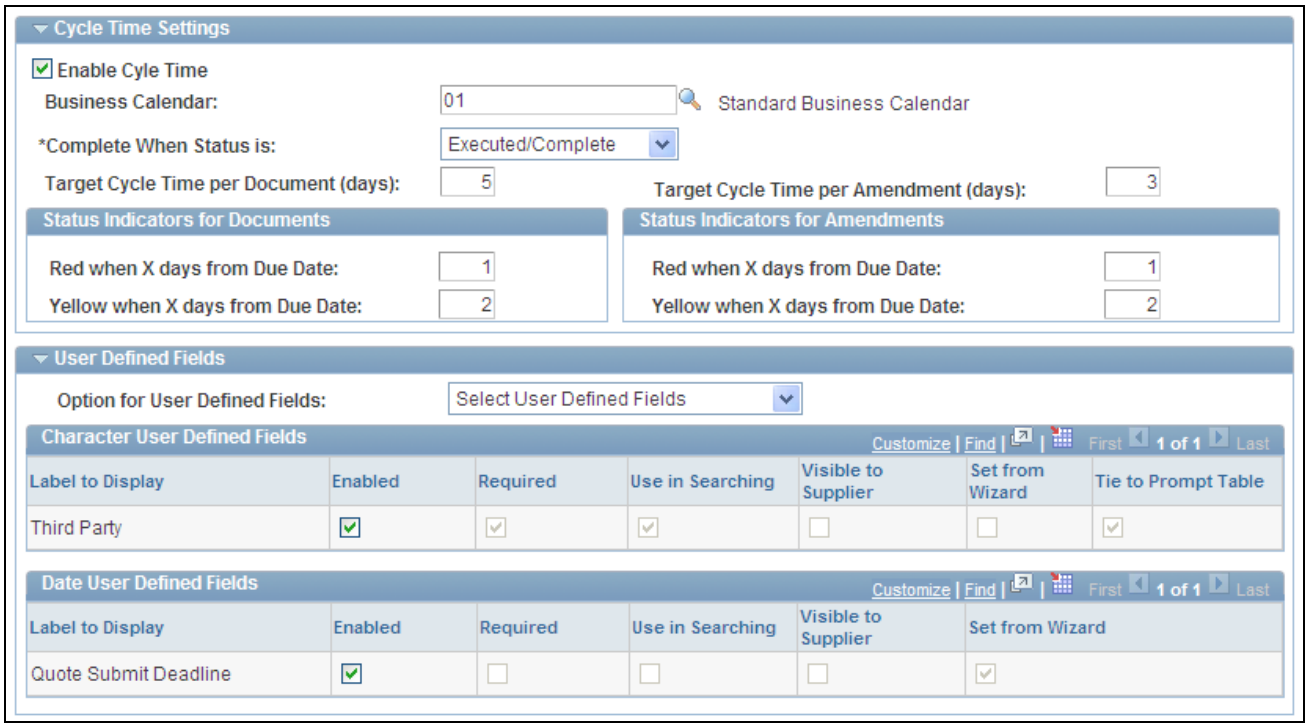
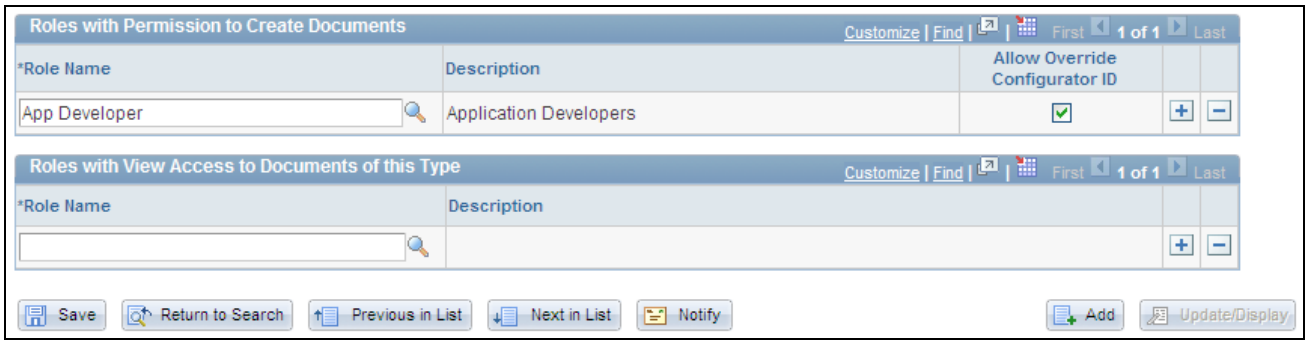


Document Type page (2 of 3)



Document Type page (3 of 3)

Use the Document Type page to create a document type. You can create document types, regardless of whether document types have been selected for use in PeopleSoft Supplier Contract Management installation options; however, the system does not apply them during document creation until the Use Document Types check box has been selected in installation options. After documents have been created using a document type, you cannot deselect the Use Document Types check box in installation options.

Document Type Displays the document type ID. Document types provide a way to categorize documents. You can define specific settings, defaults, and security that can help fine-tune the use of each type of document.

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Source

Displays the source transaction that was defined when the document type was created. Ad hoc sources are for general use, whereas purchasing contract sources are tied to a purchasing contract. After the source has been defined, you cannot change it.

Available source transactions include:

Ad Hoc: Used to create stand-alone documents that are not associated with a transactional purchasing contract and to create requests for contracts.

Purchase Orders: Used to create contracts based on transactional purchase orders. When you select this source transaction, the Internal Document check box is not available and the Applicable Status field value is set to *Full Life Cycle Status.*

Purchasing Contracts: Used to create contract documents that can reference and include transactional purchasing contract information.

If you select *Purchasing Contracts,* as the source, this page does not display the Enable on PO Requisitions,Automatic Document Generation, and Start Sequence fields.

Also, if you select *Purchasing Contracts,* the page does not enable the Internal Document check box and sets the Applicable Status field to *Full Life Cycle Status.* You cannot change the value.

Description

Enter a brief description for this document type. This field is required. The description is what you see in the document type list of values for all pages.

Status

Select the status of the document type. Values are:

Available: Makes the document type available for use. This is the default value for the field.

Obsolete: Removes the document type from availability. The system does not validate the status when you change it.

Note. If a document type is available, you must provide users the authority to create documents using this document type. Use the Roles with Permission to Create Documents grid box to define the permissions.

Copy From

Click to create a document type using attributes of an existing document type. You can only copy those document types with the same source transaction as the type you are creating. This button is available when you are creating a document type. When you click Copy From, the system displays the Copy Information From page where you can select a document type.

Delete

Click to delete this document type from the system. The button is only available if the document type is not in use with a document. The system provides a warning message before you can delete the document type. When you click Yes, the deletion is immediate.

Notes

Enter any additional information for the document type that might help clarify its use.

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Start Sequence

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 field is not available for purchasing contract sources. The start sequence controls the prefix for numbering.

If a start sequence does not exist or the Use Document Type check box is not selected in installation options, you can still use the automatic numbering default value if one has been defined.

Note. 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, which can cause gaps in sequencing for a document type. So if sequencing is important to document numbering, then ensure that you establish a unique start sequence specifically for use with a single document type.

You can create numbering sequences using the Auto Numbering page in the Supplier Contracts Setup component. You also use the feature to select the default start sequence.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Automatic Numbering Specifications, page 263.

Internal Document

Select this check box if you want the document identified as an internal document. Internal documents are those documents that are attached to a document and are intended for internal use, whereas external documents are intended for dispatching to external contacts, such as collaborators or document approvers.

If you defined the source transaction as a *Purchasing Contract* type, the Internal Document check box is not available for use.

Note. When the Internal Document check box is selected, the *Full Life Cycle Statuses* value is not available in the Applicable Statuses field. The applicable status values available are only *Draft/Complete* and *Draft/Approved.*

Allow using wizard responses from a prior document

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 Create Document page that authors can also select to use when they want to use responses from another wizard. When an author selects to use another wizard's responses, the system provides a link to select the document that includes the wizard responses.

After pulling the responses into the current document, you can change any wizard response. If you select to have the system automatically create a document, you cannot use responses to wizard questions in another document. The system goes directly to the Create Document page.

When you select this check box, the Allow copying document from a different source check box is no longer available.

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Use Only with PO Requisitions (use only with purchase order requisitions)

Select to indicate that this document type is a request type of document for use with purchase order requisitions. Documents of this type must be associated with a requisition ID and business unit. This field is available only with an ad hoc source.

Using the Use Only with PO Requisitions check box, requestors can define a related document and wizard that captures additional information. When a document type is set up for the contract 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 as needed. When you award the requisition 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 on the actual contract.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Installation Options for PeopleSoft Supplier Contract Management, page 223.

Automatic Document Creation

Select to enable the system to automatically create a document using all the defaults when you click the Add a Document button. This selection enables you to bypass the Create Document page, where you can 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 Document Management page. The system uses the next number in the starting sequence to create the document. This check box is available only for document types using ad hoc as the source.

Log View Action in History

Select to make the view history available in the document history. The view history provides an audit trail of who accessed the main document or its amendment files. When a user clicks the document's View button, the system records the action for the history. The history is logged when a document is viewed internally and externally.

Allow copying document from a different source

Select to enable the system to copy documents that use different transaction sources. For example, if this document transaction source type is an ad hoc document, then by selecting this check box, 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 for use with multiple source types, and then use that configurator as the configurator ID for a document type.

When you select this check box, the Allow using wizard responses from a prior document check box is no longer available.

Determine Configurator Using

Use this section to define how the system selects a document configurator to use when you generate a document using this document type.

See Chapter 13, "Managing Document Life Cycles," Adding Authored Documents, page 482.

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Specific Configurator Select to indicate that you want to use a specific configurator ID with this document type. Select the configurator using the Configurator ID field. When you create a document using this document type, the system uses the configurator that you define on this page as the default value in the Configurator ID field on the Create Document page.

Configurator Selector Select to use a special configurator selector wizard to determine the document configurator to be used with this document type. Select the configurator selector wizard using the Wizard ID field. When you define the document type on the Add a Document page, and click the Add a Document button, the system launches the configurator selector wizard.

After you answer wizard questions, the system selects the appropriate configurator and the Create Document page appears. At this point, you can run the configurator selector wizard again, or select another document type to create the document.

Configurator ID Select a document configurator. The field is available when you select Specific Configurator. This field is required if you are using the Specific Configurator feature. When you create a document using this document type, the system uses this specific configurator to generate the document. The system bases document types and configurators on source types of ad hoc and purchasing contracts. A configurator and a document type must use the same source type.

Wizard ID Select a configurator selector wizard to use with this document type. The field is available when you select the Configurator Selector check box. This field is required if you are using the Configurator Selector feature. When you create a document, the system uses this wizard and its questions to help you select the appropriate configurator to use when generating the document. Only wizards that have been defined as configurator selector wizards are available. Document types do not use document creation wizards. These wizards are available for use with document configurators.

Life Cycle Options

Use this group box to define life-cycle settings for a document type. Using the check boxes, 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 features in this group box also depend on settings on the Installation Options pages. For example, if you do not select to use external collaboration as an installation option, the External Collaboration check box is not available.

See Chapter 13, "Managing Document Life Cycles," Document Approval Statuses, page 479.

Enable Edit Select to control edit settings on the Document Management page when you create this type of document. When you select Enable Edit, the Enable Collaboration check box becomes available for entry.

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Enable Internal Collaboration

Select to control internal collaboration settings on the Document Management page when you create this type of document. When you select the Enable Internal Collaboration check box, you can process documents of this type through a collaboration cycle.

The Enable Internal Collaboration check box remains inactive until you select the Enable Edit check box.

See Chapter 13, "Managing Document Life Cycles," Document Collaboration for Internal Users, page 543.

Enable External Collaboration

Select to control external collaboration settings on the Document Management page when you create this type of document. This enables a supplier to review the document online using the Supplier Portal. External collaboration must be enabled on the Installation Options page for this check box to be available.

See Chapter 13, "Managing Document Life Cycles," Document Collaboration for External Users, page 544.

Enable Internal Signatures

Select to enable internal digital signatures. When you select this check box, the Enable External Signatures check box becomes available for entry. Internal signatures must be enabled on the Installation Options page for this check box to be available.

Also, when you select this check box, the system makes three check boxes available to indicate when during the document's life cycle that signatures should be captured for this type of document. You can route documents for signatures, as standalone documents, or as part of the formal approval process.

Enable External Signatures

Select to enable external users to digitally sign a document online using the Supplier Portal. You cannot enable external signatures until internal signatures have been enabled. In addition, external signatures must be enabled on the Installation Options page for this check box to be available.

Prior to Approvals

Select to indicate that signatures should be captured prior to submitting the document to the formal approval process. The system provides the Route for Signature button for the contract specialist to route the document for signatures prior to the document being formally approved.

This check box becomes available when you select the Enable Internal Signatures check box.

During Approvals

Indicates that signatures should be captured during the formal approval process. As the document is routed using the Approval Framework, approvers will sign the document as they approve it.

This check box becomes available when you select the Enable Internal Signatures check box.

After Approvals

Indicates that signatures should be captured after the formal approval process. The system provides the Route for Signature button for the contract specialist to route the document for signatures after the document has been approved.

This check box becomes available when you select the Enable Internal Signatures check box.

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Applicable Statuses

Select the grouping of statuses that you want to use to process the document through its life cycle. For ad hoc document types, the*Draft, Approve Statuses Only* value is the default value. You can change this value.

For purchasing contract types, the *Full Life Cycle Statuses* value is the default value. You cannot change the value.

Values include:

Draft, Approve Statuses Only: Select to set a document's status selections on the Document Management page to *Draft* or *Approve.*

Draft, Complete Statuses Only: Select to set a document's status selections on the Document Management page to *Draft* or *Complete.*

Full Life Cycle Statuses: Select to use all life-cycle statuses on the Document Management page. This value is the default value when the source is purchasing contract.

Note. After you create a document using this document type, you cannot change the applicable statuses.

Amendment Configurator ID

Enter the amendment configurator that you want to use when creating amendments for documents of this type. Only configurators with the Use for Amendments only check box selected on the Document Configurator Definition page appear in the list of values. The source transaction on the Document Configurator Definition page must also match the source that is defined on this page.

Note. This field is inactive until you select the *Full Life Cycle Statuses* value in the Applicable Statuses field.

Executive Summary Configurator

Select a configurator for use with an executive summary document. These are configurators that have been created specifically for use with an executive summary. This is a supplemental document that summarizes the contract.

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 Document Management page, you can create, view, and edit executive summary documents similar to managing document amendments.

Cycle and Workbench Settings

Use this section to define the cycle time and workbench settings for a specific document type. For example, you can ensure that contract requirements are achieved in a timely manner by establishing a time frame for completing documents. 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 access the document workbench. Using the results from document searches, you can view which documents are overdue or close to being late. .

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Enable Cycle Times Use this check box to indicate if cycle times should be enabled for this document type. When you select the check box, you can edit the remaining fields.

Business Calendar 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, that should be removed from any cycle-time calculations.

Complete when Status is Select the status at which you want to stop tracking a document's cycle time. 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 through to when it's executed.

You can end document and amendment cycle tracking at these statuses:

Approved

Dispatched

Executed/Complete

Pending Approval

Target Cycle Time per Document (days) Enter the target number of days that a contract document should take to be completed.

Target Cycle Time per Amendment (days) Enter the target number of days that a contract amendment should take to be completed.

Red when X days from Due Date 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.

Yellow when X Days from Due Date Enter the number of days prior to the due date that you want to populate the workbench with a yellow flag indicator.

See Chapter 9, "Managing the Contract Library," Defining Document Types, page 354.

User Defined Fields

Use this section to indicate that you want to use any of the user-defined fields that have been enabled on the User Defined Fields page for this document type. You use the Option for User Defined Fields field to select how you want to apply the user-defined fields for this document type. Field values include:

- *All User Defined Fields:*

  Select to use all the user-defined fields that have been enabled at the installation level. 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.

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- *No User Defined Fields:*

  Select to not include user-defined fields with this document type. This is the default value for the field.

- *Select User Defined Fields:*

  Select to view a list of installed user-defined fields. Using the list, you can 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 Enabled check box for each field. You cannot update individual field attributes using this page. Use the User Defined Fields page to update field attributes.

Note. If an enabled user-defined field is required, and you select the Automatic Document Creation check box, the system displays a warning message to remind you that the Create Document page will not be available when you automatically create a document with this document type.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up User-Defined Fields, page 260.

Roles with Permission to Create Documents

Use this section to add user roles that can use this document type.

Role Name Select roles that can create documents using this document type. Until a user role has access to this document type, the document type will not appear in that user's list of values. Users can also have multiple roles, so using this grid box, you can, for example, define authority to create a document using this document type in one role, and in the other role enable the user to override a configurator as well as create documents using this document type.

Allow Override Configurator ID Select to indicate that the selected roles have the authority to modify the configurator ID for use with this document type. When users have this authority, they can change the Configurator ID field on the Create Document page.

Users with View Access to Documents of This Type

Use this grid box to define who can access documents that were created using this document type ID. This setting provides only view access and not edit permission.

Role Name Select a role name to which you want to grant view access. The system validates that users of this role can view any documents of this type. This option provides an extra level of granting view access to a document other than through other areas, but does not supersede those areas. For example, users defined 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 defined here.

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Chapter 10

Using the Contract Document Wizard

This chapter provides an overview of the contract wizard and discusses how to:

- Set up question groups for the contract wizard.
- Define contract wizard definitions.
- Create documents using contract wizards.
- Define binds for use in contract wizards.

Understanding the Contract Wizard

A contract wizard is a utility that assists you in authoring a document. Two types of wizards are available. The first is the document creation wizard. It automatically guides you through a set of questions or prompts to which 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 vendor ID, dates, amounts, or items into the text within the document. The system stores contract wizard responses in wizard bind variables and uses them during document generation to process the rules and bind variables for the document configurator.

The second wizard type is the configurator selection wizard. This wizard type helps authors determine which document configurator best meets their document needs. By using a predefined set of questions, authors are directed to a configurator that they can use to create a document. You can access document creation and configurator selection wizards using the Manage Contract Library component. This section discusses:

- Document creation wizards.
- Configurator selection wizards.
- Wizard processing steps.
- Wizard bind variables.
- Question groups.
- Question navigation.

Document Creation Wizards

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You can use the document creation process with the contract wizard to manage documentation procedures and polices. 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 quicken 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 ad hoc and purchasing contract documents. Ad hoc documents are standalone documents that are not associated with a purchasing transaction. For example, an ad hoc document might be a nondisclosure agreement. A purchasing transaction document is a document that is associated with a purchasing contract within the PeopleSoft Purchasing application, and a purchase order document is associated to a purchase order in Purchasing.

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 based on 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 as a wizard bind variable.

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 flowchart 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 example illustrates the wizard process using the document creation type wizard:

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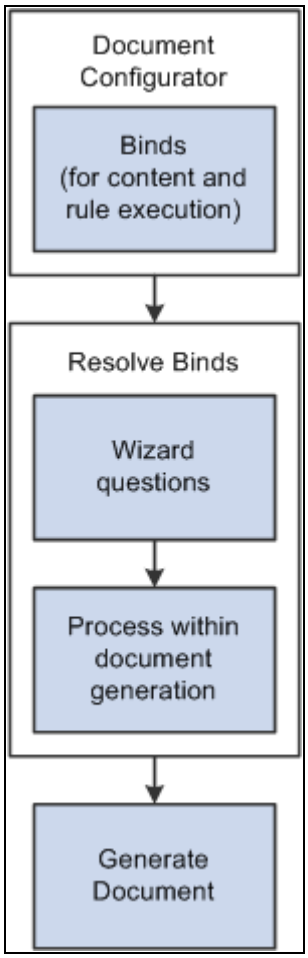

Wizard processing

To create a wizard and use it to assist in generating a draft authored document, you:

1. Define wizard bind variables.

   You use the bind variable in the wizard to substitute user-entered values into text within clauses and documents and to determine the result of a rule that can, in turn, include content in the document.

   See Chapter 9, "Managing the Contract Library," Understanding Bind Variables, page 289.

2. Create question groups.

   A wizard consists of a single or multiple groups of questions. Each question can provide a value for the resulting document or can be a simple routing to the next question or question group. You can limit and control question navigation by using a list of values and navigation to incorporate certain questions and bypass others.

3. Create the wizard.

   The system initially sets the wizard status to Draft. You can change the status to Available after completing and testing the wizard. You can also add question groups to the wizard and sequence them how you want.

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4. Test the wizard.

   A Test Mode button enables you to run the wizard without generating a document. You can go through the questions within a single or multiple question groups to ensure their flow and responses. This provides you a method to test the user paths and prompting within the wizard. You should perform further testing to evaluate each path when the wizard is linked to multiple configurators. The system doesn't save the answers that you provide in the test mode.

5. Create the rules.

   Rules use logic along with wizard and transactional bind variable values to determine document composition. If the logic in a rule is true, then one or more clauses or sections can be added to the document. For example, if the wizard question asks *"Is freight insurance required?,"* the rule in a section or configurator can use the response value to add one or more clauses or sections to the document to specify freight insurance requirements. As part of this step, you should create rules that reference wizard responses, and also include those rules on any configurators or sections in document configurators to include related content.

   Note. To use rules with a wizard, you must specify them in the document configurator after you create them here. See the next step.

   ---

6. Create a document configurator and attach the wizard.

   You can also change the wizard for an existing configurator. Using the configurator, you determine whether you use the wizard with an ad hoc, purchasing contract, or purchase order type of document. You should design the clause, section, and rules content in the configurator to reference appropriate wizard responses for the various paths in the wizard that you define in step 2.

   For example, you can include a clause directly on a configurator that contains a wizard bind that always requires a response in the associated wizard. If a response is not required the document could generate with unresolved bind values. Similarly, if a response is optional, and depending on navigation within the wizard because the clause containing the wizard bind is optional, then you should include the clause on the configurator through the use of a rule.

7. Create a document.

   When you create a document, the system uses the configurator ID that you selected on the Document Management page and invokes the wizard associated with that configurator.

8. Respond to wizard questions.

   The system prompts you with wizard question groups in the order in which they occur 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 marked as not required. When creating new documents, and you have a long wizard definition with many question groups, the document creation wizard enables Save for Later button that saves wizard values to which you have responded. In this case, the system has not created document. When you return to the document, the system uses your stored responses to the point in the question group that you saved your responses. After you create a document and entered the required wizard responses, the Save for Later button is no longer available.

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9. The system creates (generates) a draft-authored document.

   The system creates a document using the clauses, sections, and rules with the value 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 of the possible paths in the test environment and generate multiple documents with detailed logging turned on to validate that the system populates the right content and values in the document. You should do this before moving a wizard or configurator into production.

If you refresh the document or re-create the document, you might want to update some or all of the questions. The system prompts you with the existing populated wizard responses. You can change responses for questions.

If you change a question, the system might present additional questions or it might change the sequence of the questions if 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 modified, 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, you cannot proceed to the next question group until you respond. The system displays a warning when required questions are not answered.

Configurator Selection Wizards

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. You create configurator selection wizards similar to document creation wizards in that you create a set of questions that guide authors to the appropriate configurator.

When numerous configurators are available, it might be difficult to know which configurator specifically meets document requirements. This wizard enables you to answer questions that the system uses to determine which is the most appropriate configurator for you to use. In turn, this helps to limit the need for you to track and remember configurator IDs. You can only use this wizard feature in conjunction with document types.

The configurator selection wizard type is an optional tool that you can use to define questions that lead you to an appropriate configurator. When creating a question group, you specify which type of wizard the group can be used with. The system does not save questions answered as part of this wizard for use in the final document or for use with a document creation wizard; however, you can log and track configurator selection wizard answers using the Generation Logging feature.

Using these steps, you can invoke a configurator selection wizard:

1. Define any question groups, and create the selection wizard using the Manage Library component.
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 Create Document page appears without a value in the Document Configurator field.

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5. Click the Configurator Selection button on the Create Document page.

   The system launches the selection wizard. After you respond to the questions, the system displays the document configurator most appropriate for the document that you are creating.

6. 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.

7. Ensure that you have entered a description for the document and click the Create Document button.

   The system creates the document and, if the creation process includes a document creation wizard, launches that wizard as well.

Wizard Processing Steps

Document creation and selection wizards are made up of these processes:

1. Create wizard bind variables.

   You define wizard bind variables to include in question groups or rules. The selection wizard doesn't use this process.

2. Create question groups to include in wizard definitions.

   You define and sequence questions within a question group. Then, you can use multiple question groups within a single wizard definition. You can also copy existing question groups into another question group. The system appends the copied group and makes the Copy From button available to copy more groups. You can resequence the questions from any group after the group has been copied into the original question groups. When you create a question group, you indicate if it is for a document creation or selection wizard. For document creation wizards, the question group definition can be a good starting point for wizard development because it contains features that enable you to link to and create wizard bind variables and rules along with the question group and questions as you are defining them.

3. Set up the wizard definition.

   In wizard definitions you include instructions, wizard status, testing, and the order in which the wizard will ask the questions. In addition, you can preview questions, navigate to question groups while defining the wizard, and copy wizard definitions and question groups. Use the Copy From button to retrieve a wizard or question group for copying. When you initially create a wizard, you indicate if it's a document creation or configurator selection wizard.

4. Set up the wizard definition for a configurator selection wizard.

   This setup is similar to setting up a standard wizard; however, you provide navigation to a specific wizard based on the answers to questions. This type of wizard is enabled through the use of document types. Using document types, you can create structure for and categorize formal contracts or self-service documents, such as a request for contract or any other ad hoc document that you might want to generate.

   When you set up a document type, the system provides the option to use a configurator selection wizard. When you select to use this option, you also define which wizard that you want to use to determine the document configurator for that particular document type. Later, when you use the document type to create a document, the system automatically launches the selection wizard.

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5. Create a document that runs the configurator selection and the document creation wizard routine.

   Configurator selection wizards are launched based on the setup defined on the Document Type page. If required, the system launches the selection wizard when you add a document definition to guide authors to the correct configurator for the type of document they need to create. Then, if the selected configurator uses a document creation wizard, the system launches that wizard routine to create the document. During the create document routine, the system presents the questions to you in the order that is defined for the wizard. The system then executes the edits for each response prior to creating the document. When you finish the wizard routine, the system generates the document using the values and instructions from the wizard and makes the document available for viewing and editing.

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 wizard bind variables while configurator selection wizards do not.

The second type of bind variable, transaction binds, 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 purchasing contract 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 Chapter 10, "Using the Contract Document Wizard," Defining Binds for Use in Contract Wizards, page 396.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Mapping Bind Variables, page 247.

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 navigating 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 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.

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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 component 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 Chapter 10, "Using the Contract Document Wizard," Copying Question Groups, page 383.

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.

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- *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.

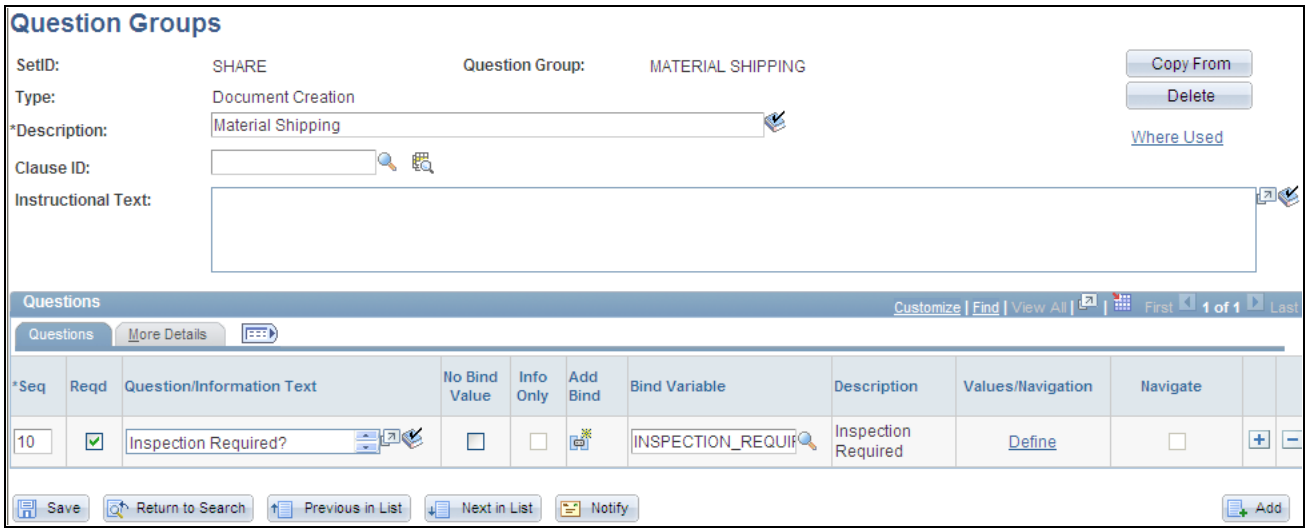
- *Specific Configurator:* Upon question response, use the specified configurator to create the document.

  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:



Yes/No question group page example

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:

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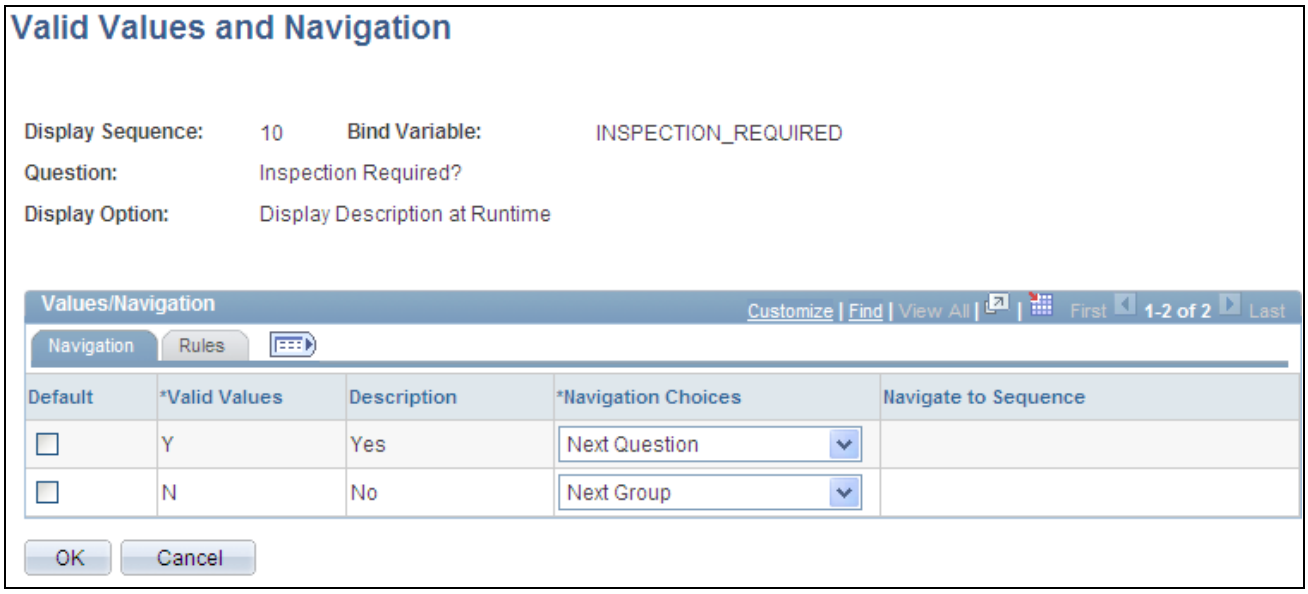

Yes/No question group navigation example

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:

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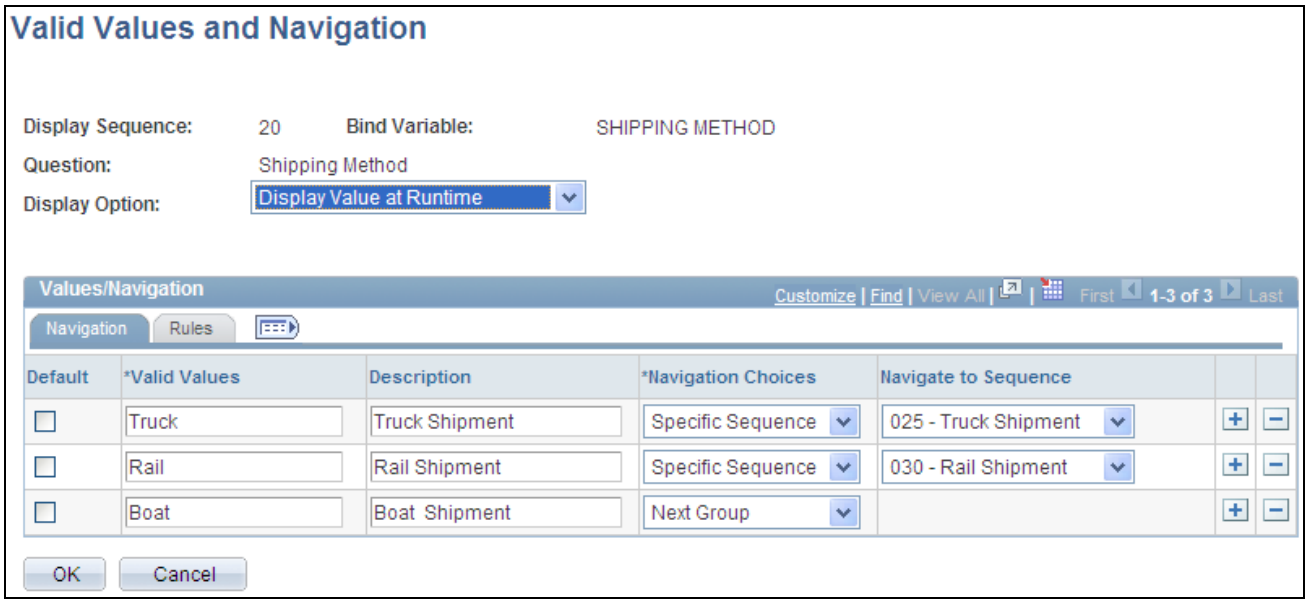

Valid values and navigation question group example

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. 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:

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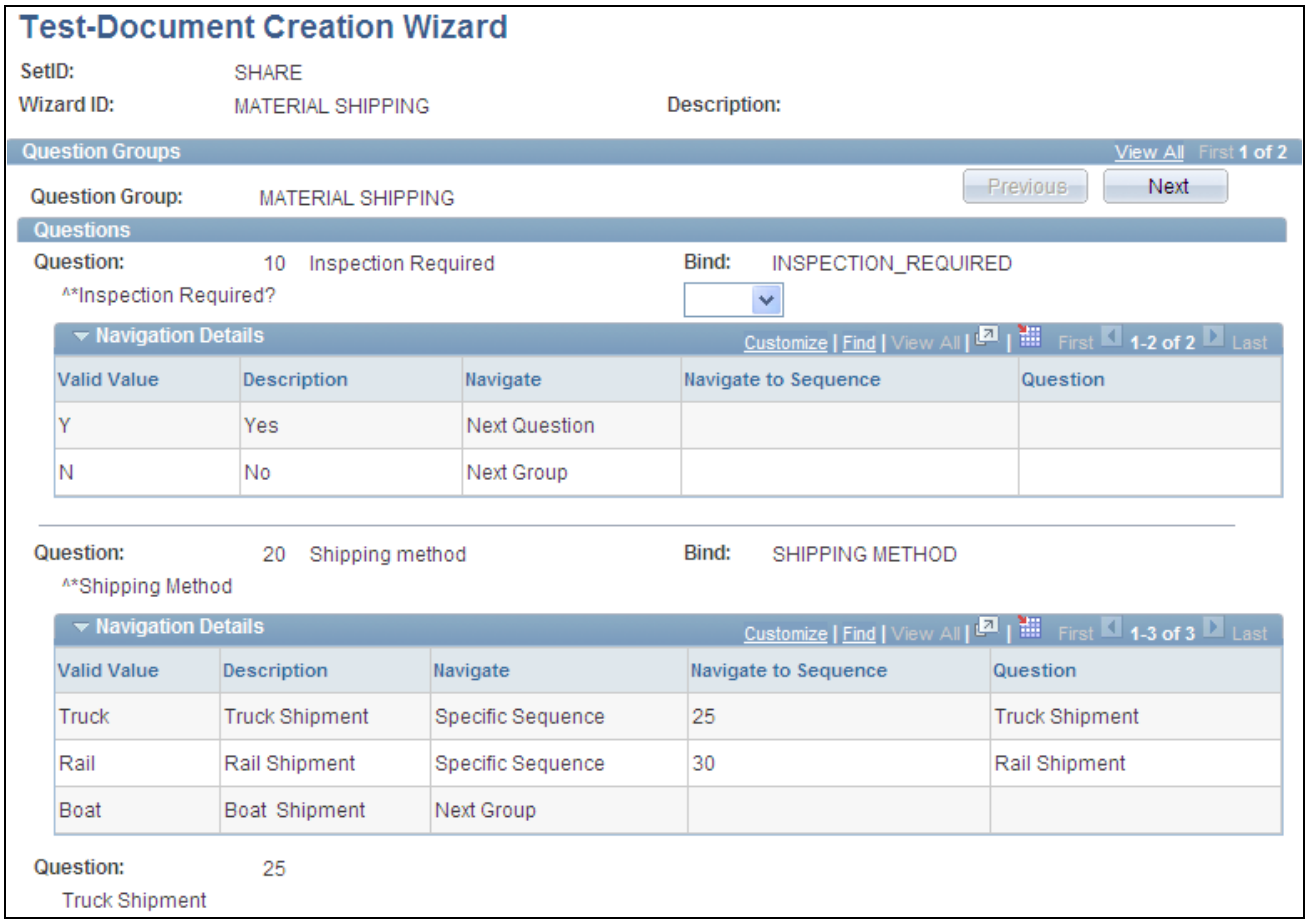

Wizard test example

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.

See Also

Chapter 12, "Generating Microsoft Word Documents," page 441

Setting Up Question Groups for the Contract Wizard

This section provides an overview of wizard-specific binds in question groups and discusses how to:

- Define document creation question groups.
- Define configurator selection question groups.
- Copy question groups.
- Define question values and navigation details.

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- View rules associated with question groups.
- Define informational URLs for questions.

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, in turn, 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 Chapter 9, "Managing the Contract Library," Understanding Document Rules, page 287.

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 contract. 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, or purchase order documents, such as adding an ad hoc clause that might not exist in the system but would be specific only to the contract being constructed and not intended for reuse.

See Also

Chapter 9, "Managing the Contract Library," Understanding Bind Variables, page 289

Chapter 9, "Managing the Contract Library," Defining Bind Definitions, page 334

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Pages Used to Set Up Question Groups for the Contract Wizard

Page Name	*Definition Name*	*Navigation*	*Usage*
Question Groups	CS_QUESTION_GROUPS	Supplier Contracts, Manage Contract Library, Question Groups Enter the question group name and select the *Document Creation* wizard type.	Define question groups for the contract wizard to use in resolving binds and determining contract document content.
Question Groups	CS_QUESTGRPS_CONFG	Supplier Contracts, Manage Contract Library, Question Groups Enter the question group name and select the *Configurator Selection* wizard type.	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.
Copy Question Group	CS_COPY_QUESTGRP	Supplier Contracts, Manage Contract Library, Question Groups Click the Copy From button on the Question Groups page.	Create a question group based on another group. After you copy the group, you can edit the questions to create the new question group.
Valid Values and Navigation	CS_QLIST_VALUES_SP	Click the Modify or Define link in the Values/Navigation field on the Question Groups page.	Define question values and navigation details.
Associated Rules	CS_RULES_SP	Click the Add Rules button on the Valid Values and Navigation page.	View rules associated with question groups.
Enter URL for Question Information	CS_QUESTINFO_SP	Click the Define or Modify link in the Setup URL column on the Question Groups page.	Define informational URLs for questions.
Bind Definition	CS_BIND_DEFINITION	Click the Add Bind button on the Question Groups page.	Create a bind for use with a question group. See Chapter 9, "Managing the Contract Library," Defining Bind Definitions, page 334.

Defining Document Creation Question Groups

Access the Question Groups page (Supplier Contracts, Manage Contract Library, Question Groups).

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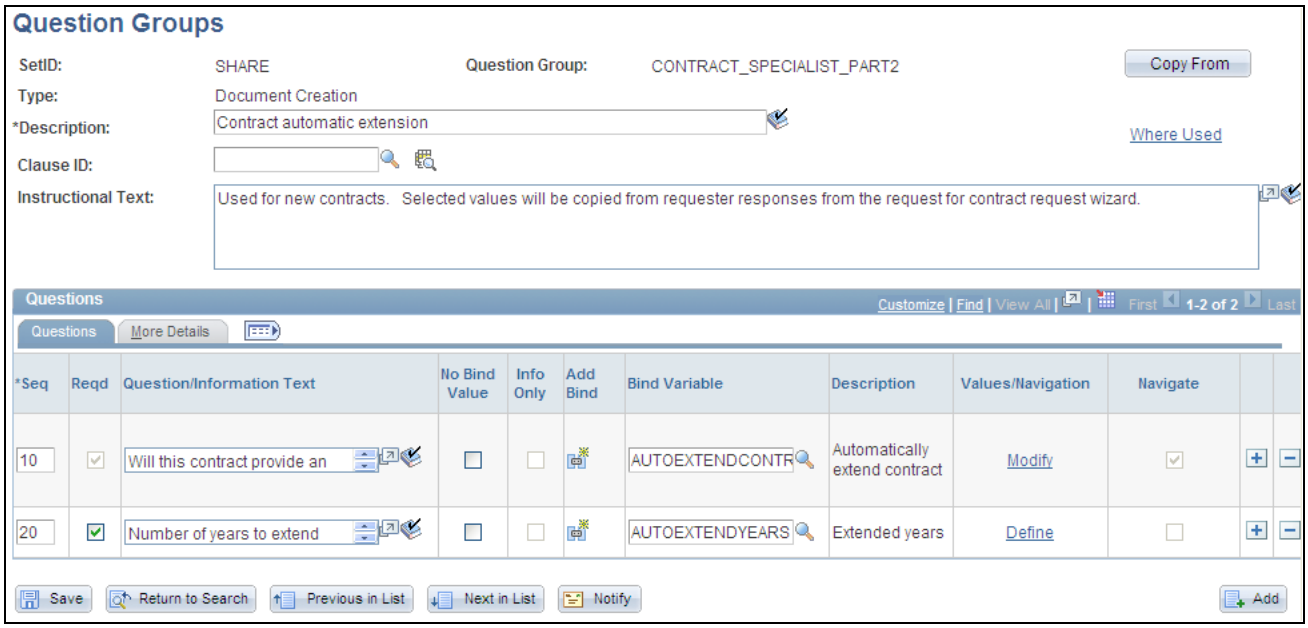

Question Groups page

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.

Copy From 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.

See Chapter 10, "Using the Contract Document Wizard," Copying Question Groups, page 383.

Delete 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.

Type Displays the type of wizard to which this question group belongs. The *Configurator Selection* wizard type includes question groups that contain questions that you can use to help determine a configurator for a document. The *Document Creation* type determines document contents.

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Clause ID

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.

Instructional Text

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.

Where Used

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.

Seq(sequence)

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.

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.

Required

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 Required 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.

Question/Information Text

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.

Click the Expand button next to the Question field to increase the text display area and enter longer questions. Click the Spell Check button to check the spelling of the question.

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.

No Bind Value

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 Bind Variable field. If you leave the field blank, you must select a bind variable.

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 Info Only 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 No Bind Value check box, the system will blank out the bind variable and replace the valid values with a yes/no type for the question.

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Info Only (information only)

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 Info Only check box, the system prevents the entry of values for the No Bind Value, Add Bind, Bind Variable, and Valid Value columns.

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.

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.

When you define a bind variable for a question, you cannot select the Info Only 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.

Add Bind

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 Bind Variable field.

Bind Variable

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.

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.

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.

Note. 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.

Description

Displays the description of the bind variable. You can update the description using the Bind Definition page.

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Values/Navigation 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 Modify link appears when you either select a yes/no or date bind variable or when you do not use a bind variable.

The Define link appears when you have not taken an action or after you have made an update on the Valid Values and Navigation page.

Navigate Indicates whether the available responses to this question have defined navigation values. Click the Define or Modify link to access the navigation setup.

More Details Tab

Access the More Details tab.

Setup URL 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 Define link. If you are updating an URL, click the Modify link.

See Defining URLs for Question Groups

Field Type 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 Bind Variable field. If you select not to include a bind, then *Yes/No* appears. Field types include: *String, Integer, Date,Date/Time,* and *Yes/No.*

Along with the field type, the size of the field is displayed when the field type is *String.* 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 *String* 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.

Defining Configurator Selection Question Groups

Access the Question Groups page (Supplier Contracts, Manage Contract Library, Question Groups).

The Question Groups page for configurator selection questions is similar to the page for document creation questions, but it's 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 included:

- What are you intending to procure with this contract?
- Does the contract require legal approval?

The differences between the pages are that the configurator selection page:

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- 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 Chapter 10, "Using the Contract Document Wizard," Defining Document Creation Question Groups, page 378.

Source Transaction 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.

Values include:

Ad Hoc: 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.

Purchase Orders: Select if you want this question group to use a document configurator based on a purchase order. Purchase order contract documents are based on PeopleSoft Purchasing purchase orders.

Purchasing Contract: 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.

Copying Question Groups

Access the Copy Question Group page (click the Copy From button on the Question Group page).

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.

Each question group being copied will be appended to any questions that may already exist in the original question group grid. If question group instructions or the clause ID on the originating page are blank, then the system copies these values. After appending a copied question group to the original group, you can resequence questions, but keep in mind that resequencing is subject to cross checks with navigational references.

Note. Remember that when resequencing questions, the system validates navigational references. So the question must be sequenced to match the navigation or you need to update navigation references.

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Copy From Question Group

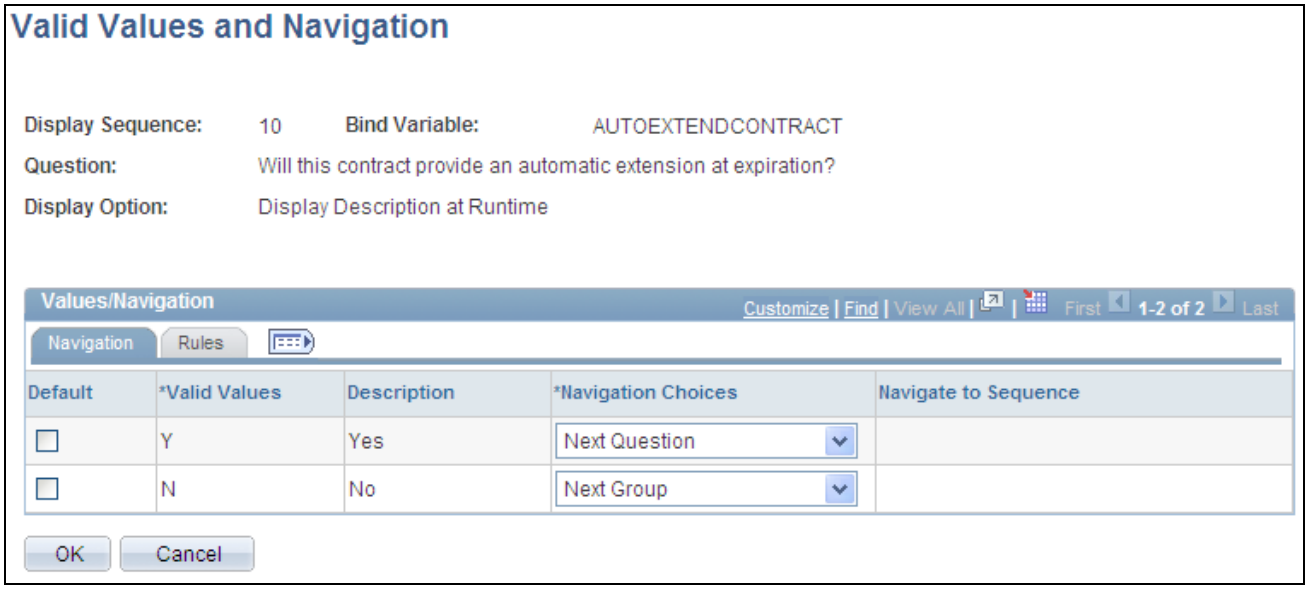
Select the question group from which you want to either create a new group or append an existing question group. The valid values and navigation list contains only the question groups for the wizard type you are using.

For copied items, the system increments lines in the Navigate to Sequence 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.

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.

Defining Question Values and Navigation Details

Access the Valid Values and Navigation page (click the Modify or Define link in the Values/Navigation field on the Question Groups page).



Valid Values and Navigation page: Navigation tab

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.

Display Sequence Displays the order in which the question is asked in the question group.

Question Displays the question text.

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Display Option Use this field to select how you want the system to display information about the question group. Values include:

Display Description at Runtime: Displays the value description when the system processes the wizard during document generation and during wizard testing.

Display Value at Runtime: Displays the actual value when the system processes the wizard during document generation and during wizard testing.

Navigation Only (No Values): Prevents entering valid values and instead provides only navigation options. This value is not available for question groups using a configurator selection wizard type.

Default 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.

Valid Values Enter a value that the system can make available to authors to answer this question.

Description Enter a description of the value that you entered in the Valid Value field.

Navigation Choices Select a navigation action that the system should take when a document author is using the wizard to create a document. Values include:

Next Group: Select to indicate that the document author should use the first question in the next question group.

Next Question: Select to indicate that the document author should use the next sequenced question in this question group.

Specific Configurator: 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 created the document. This value is available only for document configurator selection wizards.

Specific Sequence: Select to indicate that the document author should bypass the next question and go to a specific question in this question group.

Navigate to Sequence 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 *Specific Sequence* in the Navigation Choices field.

Configurator ID 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 *Specific Configurator* in the Options field.

Rules

Select the Rules tab.

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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 Chapter 10, "Using the Contract Document Wizard," Document Creation Wizards, page 365.

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.

Default 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.

Valid Values 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.

Note. Make sure that you enter valid values before clicking the Add Rule button. The system displays an error message if a valid value has not been defined.

Add Rule Click to access the Rules page. This page contains defaults for the bind variable. You can only enter rules for the values that have been entered.

After you save the rule, the system returns to the Valid Values and Navigation page and displays the Show Rules button. The Add Rules button still appears because you can add multiple rules for a particular question value.

See Chapter 9, "Managing the Contract Library," Setting Up Contract Rules, page 330.

Show Rules 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 *No Current/Active Rule* in the Show Rules column.

Viewing Rules Associated With Question Groups

Access the Associated Rules page (click the Add Rules button on the Valid Values and Navigation page).

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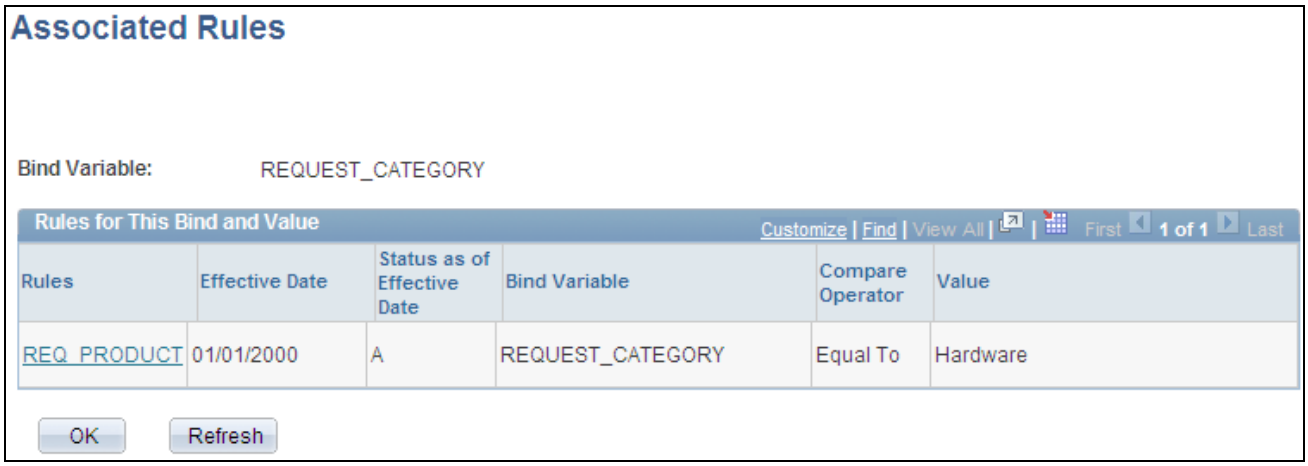

Associate Rules page

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.

See Also

Chapter 9, "Managing the Contract Library," Setting Up Contract Rules, page 330

Defining Informational URLs for Questions

Access the Enter URL for Question Information page (click the Define or Modify link in the Setup URL column on the Question Groups page.

Enter URL for Question Information page

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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.

Display Sequence Displays the order in which the question is asked in the question group.

Question Group Displays the name of the question group to which you are attaching the URL.

Question 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.

Label 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.

When the wizard is running, the label appears as a link along with the question. Authors can access the URL by clicking the link.

URL Text (uniform resource locator text) 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.

To add another URL link that will appear with this question in the wizard:

- Complete the first URL address, and navigate to the Question Group page.
- Insert another question using the next sequence number, but do not enter a question.
- Select the Info Only check box for the question, and click the Define link to access the Enter URL for Question Information page.
- Leave the Question field blank.
- Enter another label and another URL.

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.

Test URL Click to verify that the URL that you entered is valid. The system provides a warning if the URL is not valid.

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Defining Contract Wizard Definitions

This section discusses how to:

- Define wizard information
- Test wizard values
- View expanded wizards

Pages Used to Set Up Wizard Definitions

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Wizard	CS_WIZARD_SUMM	Supplier Contracts, Manage Contract Library, Wizards	Define wizard information for document creation or configurator selection wizards.
Test-Document Creation Wizard	CS_WIZARD_EXECTEST	Click the Test Mode link on the Define Wizard page for a document creation wizard.	Test wizard values for document creation wizards.
Test-Configurator Selection Wizard	CS_WIZARD_EXECUTE	Click the Test Mode link on the Define Wizard page for a configurator selection wizard.	Test wizard values for configurator selection wizards.
Wizard Summary	CS_WIZSUMM_SP	Click the View Expanded Wizard link on the Define Wizard page.	View expanded wizards.

Defining Wizard Information

Access the Define Wizard page (Supplier Contracts, Manage Contract Library, Wizards).

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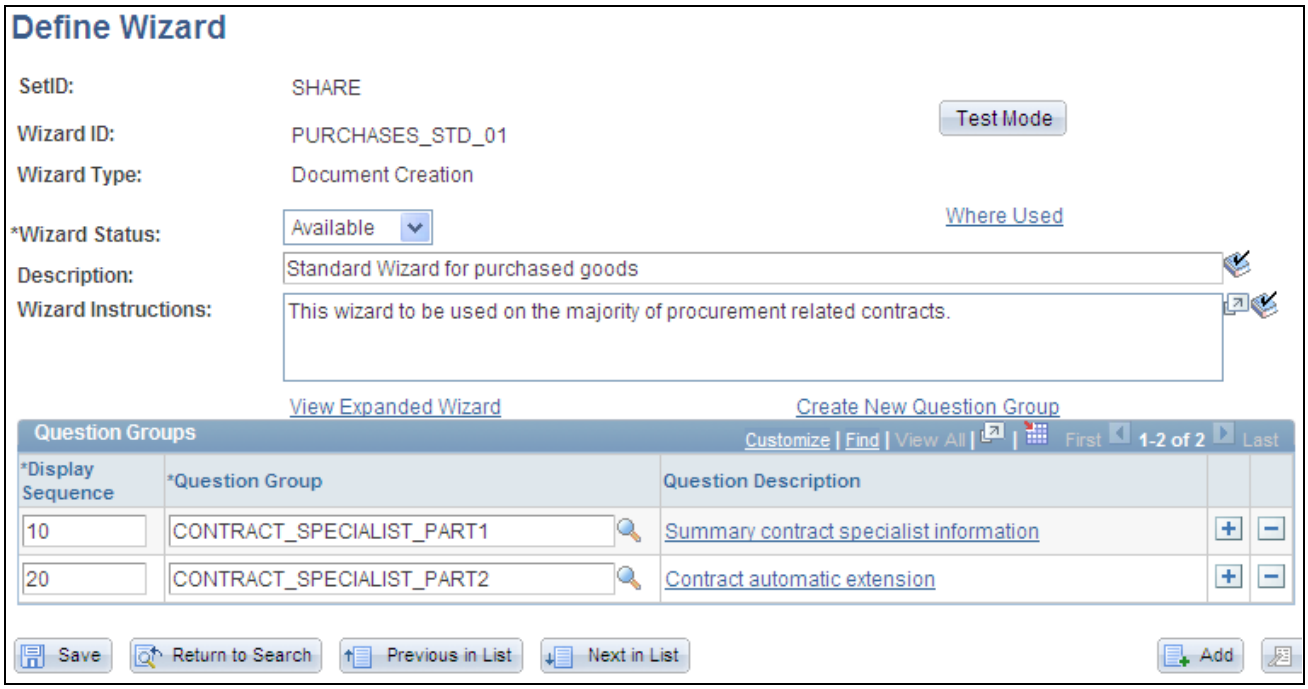

Define Wizard page

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.

Wizard ID 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.

Copy From 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 Delete button. After you use the wizard in a document, the Delete button also becomes unavailable.

Test Mode 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.

See Chapter 10, "Using the Contract Document Wizard," Testing Wizard Values, page 392.

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Wizard Type 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:

Configuration Selection: 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.

Document Creation: 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.

Source Transaction Select a source transaction type on which to base the use of this wizard. This field is available when you select the *Configuration Selection* value in the Wizard Type field. When you select the source transaction, the system limits the use of the wizard to that transaction type. Values include:

Ad Hoc

Purchase Orders

Purchasing Contracts

Wizard Status 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 *Available* 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 *Draft*, the wizard cannot be used to create documents and does not appear with available wizards.

Where Used Click to access the Search for All Content Instances page, where you can view where this wizard is used.

Description Enter a value that uniquely describes the wizard.

Wizard Instructions 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.

View Expanded Wizard 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.

Create New Question Group Click to access the Question Group page, where you can define another set of questions for this wizard. The system provides a new page for this function.

See Chapter 10, "Using the Contract Document Wizard," Defining Document Creation Question Groups, page 378.

Display Sequence 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.

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Question Group 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.

Question Description 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.

Testing Wizard Values

Access the Test-Configurator Selection Wizard page (click the Test Mode link on the Define Wizard page for a document creation wizard).

Use this page 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.

Group Instructions 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.

Finish Click to terminate the test mode and return to the Define Wizard page.

Cancel Click to return to the Wizard Definition page at anytime while you are testing the wizard.

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.

Viewing Expanded Wizards

Access the Wizard Summary page (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.

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Seq (sequence)	Displays the sequence of question groups within the wizard.
Question Group	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.
Question Display Sequence	Displays the sequence of questions within the question group.
Question	Displays the question. Multiple questions can appear with a question group.
Bind Variable	Displays the bind variable value. If the No Bind Value check box was selected on the Question Group page, ** *no bind variable* ** appears in this field.
Required	Displays whether a response is required for the question. Values include *Y* and *N*.
Display Option	Displays how the system presents information about the question group when it processes a question. Values include: *Display Description at Runtime:* Displays the description when the system processes the wizard during document generation and during wizard testing. This value corresponds to the Answer Description field and is the value that displays when you select this option. *Display Value at Runtime:* Displays the value when the system processes the wizard during document generation and during wizard testing. This value corresponds to the Possible Answers field and is the value that displays when you select this option. *Navigation Only (No Values):* 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 Navigate field and is the value that displays when you select this option.
Possible Answers	Displays the answers that have been defined for the question. You define these values using the Define or Modify link on the Question Groups page. Use the Valid Values field on the Valid Values and Navigation page to define the value.
Answer Description	Displays the description for the answer.
Navigate	Displays the navigation for this question. For example, depending on the answer, the system might navigate to the next question group.
Go to Seq (go to sequence)	Displays the sequence number for the next question.
Hyperlink Label	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.
URL Text(uniform resource locator text)	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.

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Configurator ID Displays the configurator selection wizard that the system will use with the corresponding answer to this question.

Creating Documents Using Contract Wizards

This section provides an overview of document creation and discusses how to use a wizard to create documents.

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.

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.

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.

   Note. When entering contract or purchase order information, the transaction must already exist.
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.

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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's 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.

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.

Pages Used to Create Documents Using Contract Wizards

Page Name	*Definition Name*	*Navigation*	*Usage*
Wizard Execute - Document Creation	CS_WIZARD_EXECUTE	Supplier Contracts, Create Documents and Contracts, Document Management Select a configurator ID that uses a contract wizard for document creation.	Create documents using contract wizards.
Configurator Selection Wizard	CS_WIZARD_EXECUTE	Supplier Contracts, Create Documents and Contracts, Document Management Select to create a document type that uses a configurator selection wizard on the Add a Document page.	Create documents using contract wizards.

Using a Wizard to Create Documents

Access the Wizard Execute - Document Creation or the Configurator Selection Wizard page (Supplier Contracts, Create Documents and Contracts, Document Management and 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. You use the Previous and Next buttons to navigate among question groups.

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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.

Question Group Displays the group identifier for the questions that are listed on this page.

Group Instructions 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.

Previous Click to return to the previous list of questions. The Previous 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.

Next Click to go to the next page of questions. The next page might be a continuation of a question group or another question group.

Finish 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.

Save for Later Click to save your responses to the wizard questions. The system displays a confirmation page. When you click the OK 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. When you are ready to continue, search for the document and click the Create Document 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.

Click the Cancel button on the confirmation page to return to using the wizard. The Save for Later button is available regardless of the number of questions in the wizard, and is only available for use with document creation wizards.

See Also

Chapter 10, "Using the Contract Document Wizard," Defining Document Creation Question Groups, page 378

Defining Binds for Use in Contract Wizards

This section discusses how to define wizard binds.

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See Also

Chapter 9, "Managing the Contract Library," Understanding Contract Wizards, page 305

Chapter 9, "Managing the Contract Library," Defining Bind Definitions, page 334

Page Used to Define Binds for Use in Contract Wizards

Page Name	*Definition Name*	*Navigation*	*Usage*
Bind Definition	CS_BIND_DEFINITION	Supplier Contracts, Manage Contract Library, Binds	Define wizard binds.

Defining Wizard Binds

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.

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- Yes/no binds enable the use of yes or no answers in the bind field.

For more information about setting up binds, such as prompt tables and bind formatting options, for use with wizards, see the Understanding Bind Variable section.

See Also

Chapter 9, "Managing the Contract Library," Understanding Bind Variables, page 289

Chapter 9, "Managing the Contract Library," Defining Bind Definitions, page 334

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Mapping Bind Variables, page 247

Chapter 9, "Managing the Contract Library," Setting Up Contract Rules, page 330

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Chapter 11

Importing Clauses, Sections, and Documents

This chapter discusses how to:

- Import clauses and sections.
- Import contract and ad hoc documents.

Importing Clauses and Sections

To import clause and section objects, use the Clause Import (CS_CLAUSE_IMPORT) component.

This section provides an overview of the clause and section upload process and discusses how to:

- Define default values for object attributes.
- Import objects to the Import Clauses/Sections page.
- Review and update imported clause and section details.
- Create clauses and sections, and resolve errors.
- Create a document configurator during object import.
- Review a document configurator created during object import.

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 custom tagging. To import existing clauses into the system, the clauses must first exist or be saved in a Microsoft Word 2003 Professional XML format.

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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 by themselves, or optionally, select certain 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 within the same session of the import component, you can select to create a new configurator from the content that you just imported. This can be useful and speed the process if you have existing Microsoft Word templates that you want to break out into clauses and create a configurator as part of the import.

Note. You cannot create table clauses when you import clauses.

Note. The configurator creation feature is intended for use by clause librarians only.

Object import sessions are made up of these stages:

1. Object XML file creation.

   Each object (clause) within Microsoft Word must have specific XML tags to meet the structural requirements for system objects. To create these XML files, apply custom import tags to content within the Microsoft Word document that contains objects and save the file as a Microsoft Word 2003 .xml file format. You do this to tag individual clauses in existing Microsoft Word documents.

   To complete this stage, edit legacy files on a local drive and prepare them for import to the Import Clauses/Sections page.

   See Appendix A, "Microsoft Word Integration with Supplier Contract Management," XML Schema, page 704.

2. Object default attribute definition.

   Before and during the import of legacy files, you define basic information that you can use as default values for one or multiple objects that you upload. Use the Defaults for Object Attributes section to complete this stage.

   See Chapter 11, "Importing Clauses, Sections, and Documents," Defining Default Values for Object Attributes, page 404.

3. Object file import.

   You select the XML file that contains the legacy clauses, child clauses, or sections for import. After defining default information, click the Select XML File button to locate and import the files to the Import Clauses/Sections page.

   See Chapter 11, "Importing Clauses, Sections, and Documents," Changing the Source Transaction For an Imported Ad Hoc Document, page 439.

4. Object creation 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.

   See Chapter 11, "Importing Clauses, Sections, and Documents," Reviewing and Updating Imported Clause and Section Details, page 412.

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5. Configurator creation in the contract library.

   After you create clauses and before exiting the component, you can also 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 simpler existing templates that you might have in Microsoft Word, 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 shown to review and edit the Document Configurator Definition component for the new configurator that you just created.

See Chapter 9, "Managing the Contract Library," Understanding Document Clauses, page 276.

Object Import XML Schema

Object import XML schema enables the system to define the structure, content, and semantics for XML documents. PeopleSoft Supplier Contract Management uses a custom-defined import schema that describes the tags that the system uses for various fields.

To support the import of clauses and sections, the PeopleSoft application provides the scmt_clause.xsd schema for elements that are only applicable to clause and section objects. You should install this schema in the Microsoft Word schema library on client machines where users will need to import objects. After adding the schema, the system makes the correct XML elements available for structuring (tagging) individual objects for import. You must install the schema if you have different objects in the same file. The system needs to read each individual object, but it cannot read the object if you do not mark or tag each object.

To attach the scmt_clause.xsd schema on a client machine:

1. Open a Microsoft Word XML document.
2. Select Tools from the toolbar, and then select Templates and Add-Ins.
3. Select the XML Schema tab, and click the Add Schema button.
4. Locate the scmt_clause.xsd file, and add it to the schema library.
5. Provide an alias for the schema.

   The system uses this alias as part of the tag description.

At a minimum, each clause, child clause, or section must have the XML element *new_clause* in the Microsoft Word file and it must be saved as a Microsoft Word 2003 .xml file type format. The purpose of the new_clause tag is to mark the beginning and ending of each new object to be imported from the file. If a file does not contain scmt_clause.xsd schema tags, 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 apply XML tags to each new object but leave untagged text between objects, then the system ignores that text during the upload.

This example illustrates how a Microsoft Word file might be structured, including the XML tagging that you apply to clause and section objects, for import into the Supplier Contract Management system:

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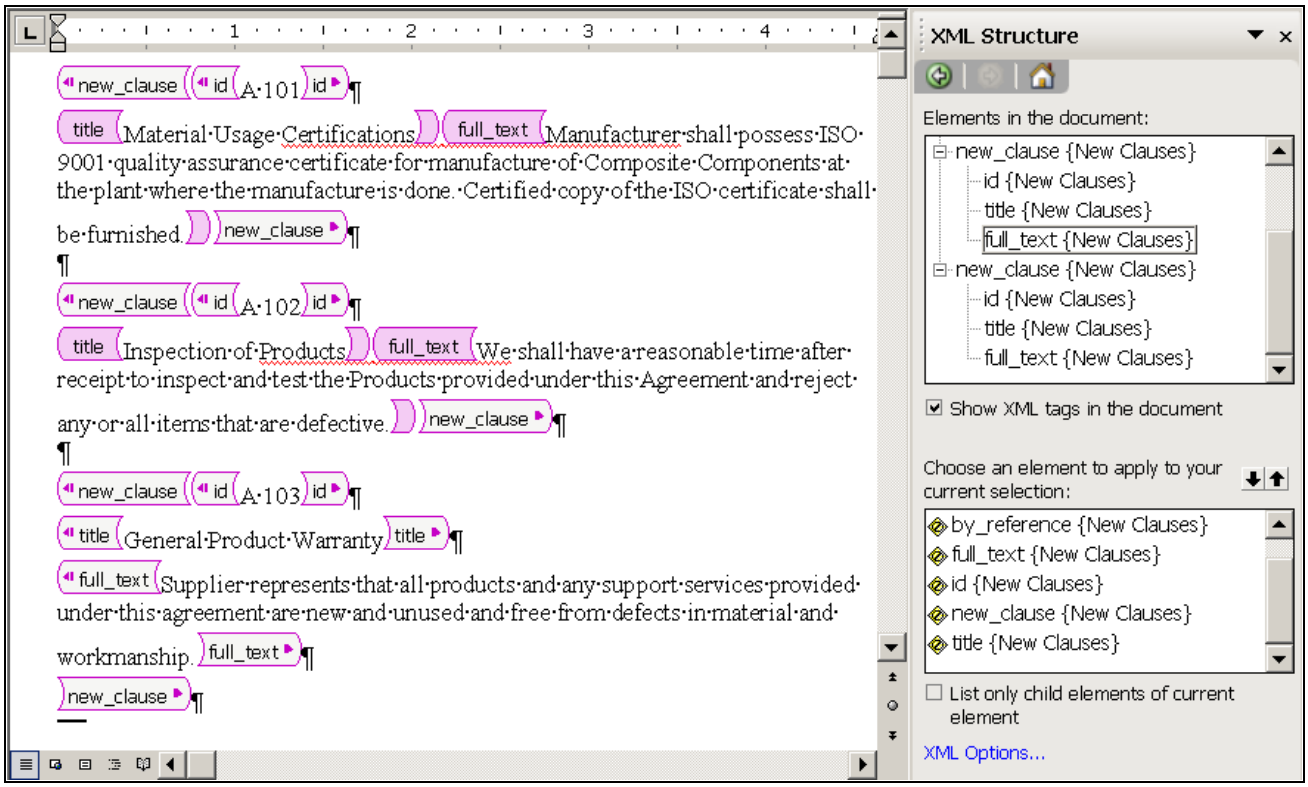

Example of object import XML tags as they appear in a Microsoft Word document

Using the XML file, you map data rows from the import source into the clause or section definition structure of the application. After you add the scmt_clause.xsd schema, the new_clause tag is available for formatting objects for import. As you structure objects, you select the text to which you want to attach a new_clause tag. The tag has these elements for structuring objects:

- ID: You can enter an ID for the object that the system can use to name the object when it's created in the document authoring system.
- Title: The system uses the value you define for this element as the object title. You can also use the first string of text in the title to create an ID for the clause or section object using the Import Clauses/Sections page.
- Full Text: This element provides the Full Text field for the new object.
- By Reference: All text within this element is parsed into the By Reference field of the new object.

After you tag all objects within the document that you want to import, you must save the Microsoft Word document as a Microsoft Word 2003 .xml file format. Next, you select the file for uploading on the Import Clauses/Sections page. Complete the import action on 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, then the system discards the objects and you will need to enter the default information and select the XML file again.

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Imported Clause Formatting

Because so many varieties of imported content exists from company to company, you might want to consider some points as part of an import to reduce the amount of rework that might be needed to achieve the wanted format of clauses after they are in the library. These points are not requirements and each situation is different. Consider these points to help you during the object implementation process:

- Titles

  Generally, you should use separate titles with each clause or section that you define, especially when using the system to automatically number the content. Using separate title, each title will be numbered, and the content below it not numbered, enabling you to better create tables of contents base on the title's paragraph style in Microsoft Word if needed.

- Numbering

  Generally, you might want to strip the numbering in Microsoft Word prior to the import if an existing template and content contains simple numbering, such as when each outer clause is numbered. This is especially true if the template contains text numbering.

- Paragraph Styles

  Generally, if an existing template and document content contains simple clauses without a lot of indented bulleting and numbering, you should consider removing all paragraph style formatting and keeping the style as normal. This enables you to centrally 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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Document Templates and Styles, page 252.

  This approach may not always be possible when you have more complex clauses. With complex clauses it's possible to specify styles within each Microsoft Word clause. The system can incorporate these styles as it generates the documents and ignores the paragraph style specified in the system's Microsoft Word templates.

  When you are not sure about paragraph styles and number, you 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 numbering the system will apply when you create the document. Using information from the preview document, you can edit system templates or individual clauses and sections to achieve the format that you want.

Note. You can only create general clauses when using the object import process. You cannot create table clauses. These are clauses designed for use with Microsoft Word tables and summarizations for transactional field values.

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Pages Used to Import Objects

Page Name	*Definition Name*	*Navigation*	*Usage*
Import Clauses/Sections	CS_CLAUSE_IMP_SUMM	Supplier Contracts, Manage Contract Library, Import Clauses/Sections	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. **Note.** The summary and detail view pages for importing objects are the same; only the page layout is different. The summary view uses tabs to summarize information.
Show Object Details	CS_CLAUSE_IMP_DTL	Supplier Contracts, Manage Contract Library, Import Clauses/Sections Click the Show Detail View button on the Import Clauses/Sections page.	Define default values for object attributes. Also, upload objects, import and create objects, review and update import object details, and create objects and review errors. **Note.** The summary and detail view pages for importing objects are the same; only the page layout is different. The summary view uses tabs to summarize information.

Defining Default Values for Object Attributes

Access the Import Clauses/Sections page (Supplier Contracts, Manage Contract Library, Import Clauses/Sections).

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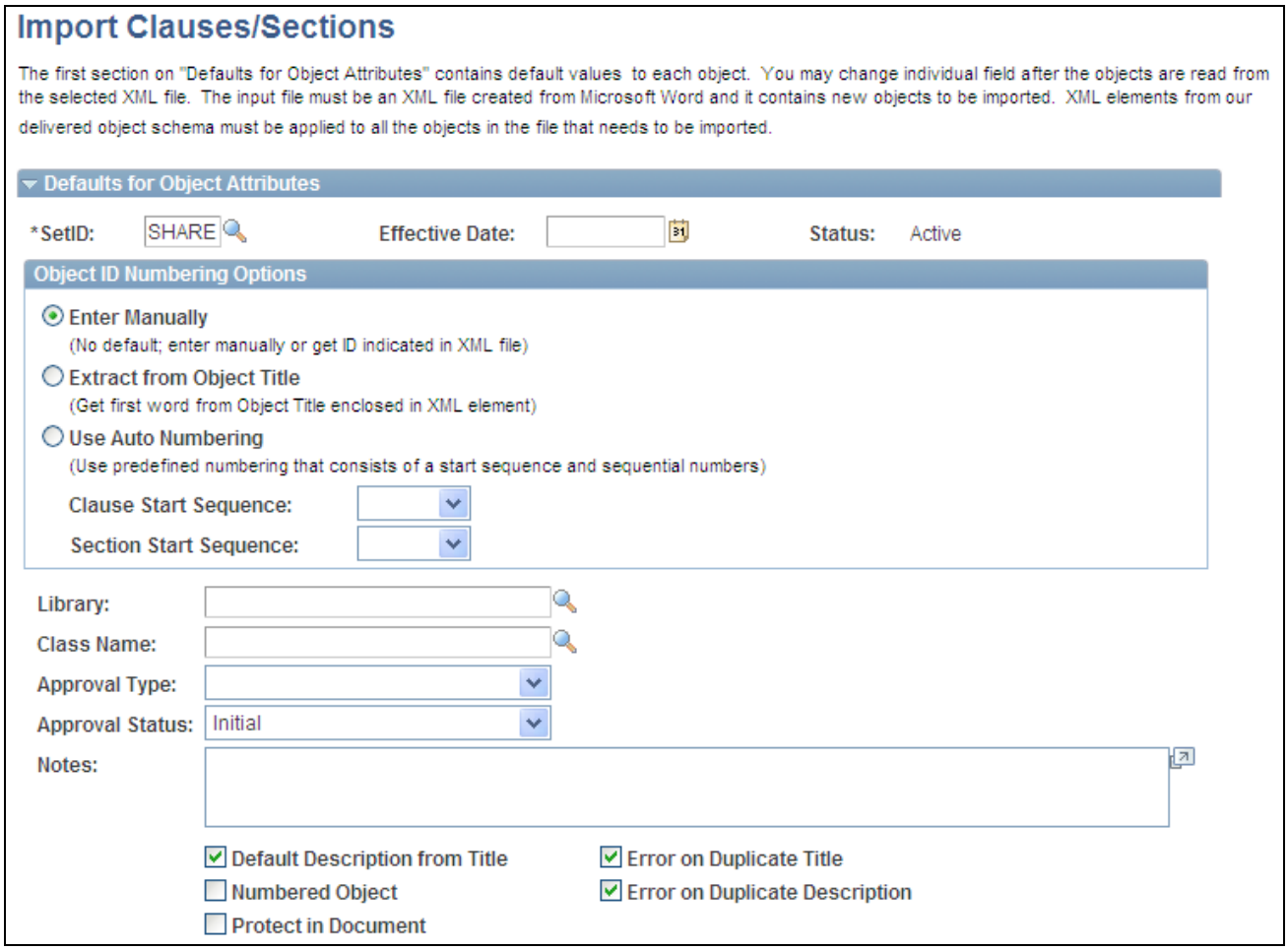

Import Clauses/Sections page (1 of 2)

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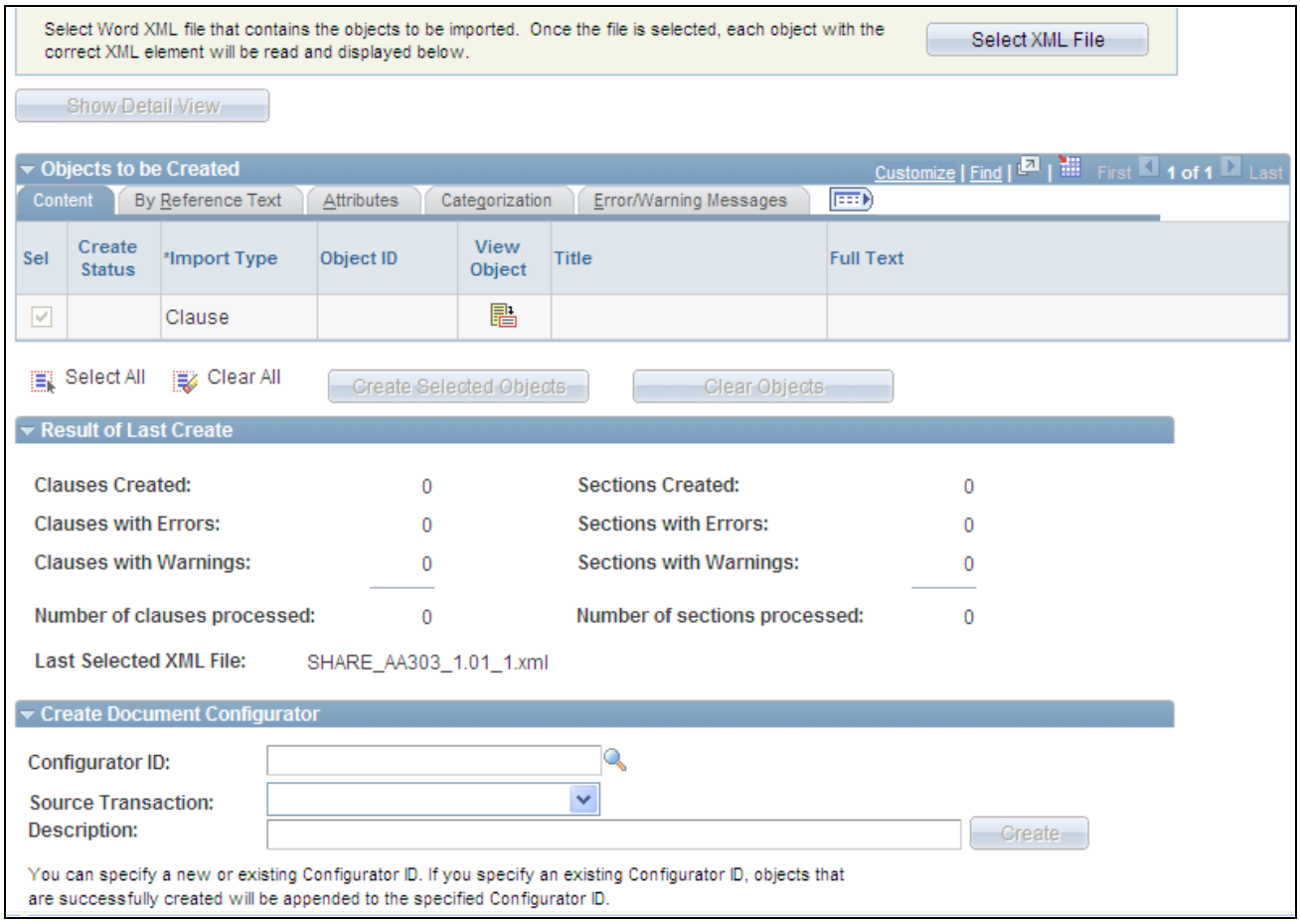

Import Clauses/Sections page (2 of 2)

After object clause creation processing, you can review and fix warnings and errors as you work to process uploaded files into the clause library. 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 with errors and then select to create the objects again.

The Default for Object Attributes group box for objects uploaded from selected files applies to all objects uploaded from the selected XML file. These attributes save you 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.

Note. All objects are initially imported as clauses. After you upload and import the files, you can redesignate the object type using the Objects to be Created grid. You can designate the object as a clause, child clause, or section before uploading the objects into the contract library. The system does not display values that relate only to clauses when you assign a section import type.

You can override most of the attributes for individual objects after you upload them and before you create them in the contract library. The Objects to be Created grid provides fields in which you can update information for individual objects. For example, you can update the effective date, whether or not an object is numbered, or the library to which a clause object is assigned before you create the object.

See Chapter 9, "Managing the Contract Library," Defining Contract Clauses, page 307.

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Note. The Show Detail View, Show Summary View, Create Selected Objects, and Clear Objects buttons on this page are not available until you upload an object.

SetID 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.

Effective Date Select an effective date. The default value for the field is blank. You can also enter a date after you import the clause or section using the Show Detail View or Show Summary View buttons. Effective dates can be overridden for individual objects. Normally, when you initially import objects to create the object 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 contract or ad hoc document that you need to generate based on the contract or ad hoc start date.

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 clause or section from an external Microsoft Word document.

Status Displays the status of the clause or section. The default value for the field is *Active.* You cannot change the value because the system imports and creates clauses and sections in the Active status.

Enter Manually Select to manually enter the ID for the clause or section or use the value in the id tag from the Microsoft Word XML file. You use the Object ID Numbering Options group box to select how you want to create names for the objects.

Extract from Object Title Select to extract the clause, child clause, or section ID from the first string of text within the *title* tag. 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 tag the object ID using the *id* tag in the schema. Otherwise, only the characters preceding the space will be extracted as the object ID.

Use Auto Numbering Select to use automatic numbering. The system displays the default starting sequence for both clauses and sections, but you can select other values. Using automatic numbering, the system uses NEXT as the clause or section ID when each object is parsed from the uploaded file and added to the Objects to be Created grid box. When you create the object, the system assigns the next number in the specified starting sequences to the clauses and sections.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Automatic Numbering Specifications, page 263.

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Clause Start Sequence Select the automatic numbering start sequence for a clause. This field becomes available when you select to use auto 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 number the clause.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Automatic Numbering Specifications, page 263.

Section Start Sequence Select the automatic numbering start sequence for a section. This field becomes available when you select to 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 number the section.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Automatic Numbering Specifications, page 263.

Library Select the library to which you want to assign the clauses that you import and create. You can use the Categorization tab to override this value for individual objects. If you select to import an object as a section, the system ignores the value that you enter in this field because only clauses and child clauses apply are assigned to a library. When you select the import type using the Objects to be Created grid, the system does not display library values for a section.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Clause Libraries, page 242.

Class Name Select a class to which you want to assign 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 Approval Type field. You can use the Categorization tab to override this value for clauses and child clauses. If you import sections, the system does not use the value in this field, nor does it display the value on the Categorization tab.

Approval Type Select an approval type to assign to the clause and child clause objects that you import and create. If the class has a default approval type, you cannot change this field. You can use the Categorization tab to override this value for individual clauses and child clauses. If you import a section, the system ignores the value in this field and does not display a value for the approval type on the Categorization tab.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up Approval Types, page 243.

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Approval Status

Select the status at which you want to set the approval for objects when it's created. If clause approval is required on the Installation Options page, the default value for this field is *Initial.* You cannot change the value in this field.

If clause approvals are not required, you can select *Initial* or *Approved.* Approved statuses make objects available for use when they are imported and created. When you set the status to *Approved* and the object contains bind variables that are not valid, the system creates the object but changes the status from *Approved* to *Initial.*

The system uses the same approval status for clause, child clause, and section objects.

See Chapter 9, "Managing the Contract Library," Defining Clause Information, page 309.

Notes

Enter additional information about the use of a single or multiple objects. This text applies to all objects that you import and create using this object import session. You can override this value on the Attributes tab.

Default Description to Title

Select to indicate that you want the system to use the first 60 characters of the title element in the Microsoft Word XML files as the entry for the Description field. If a title does not exist for the object, the system leaves the Description field blank. You must enter a description before you create the object.

Error on Duplicate Title

Select to indicate that the system should check whether the title already exists for a clause or section. If a duplicate title does exist, the system will not add the object and places an error message on the Error/Warning Messages tab.

Numbered Object

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 it in the contract library. Numbered objects apply to all clauses and sections.

Error on Duplicate Description

Select to indicate that the system should check whether the description already exists for a object in the clause library. If a duplicate description does exist, the system will not add the object and places an error message on the Error/Warning Messages tab.

Protect in Document

Select to indicate that a clause or section should be protected when it is being included in a contract document. After you import the objects, you can manually update the value for each object before creating it in the contract library.

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Select XML File Click this button to access the Select XML File to the Import Clauses page. Using that page, select a Microsoft Word XML file that contains the object you want to import. If you are uploading objects from more than one file, the system prompts you to remove or append objects if you have previously uploaded objects in the Objects to be Created grid box.

You select one file at a time, but that file can contain multiple objects that the system will segregate upon uploading. Then, you can maintain individual objects using the Objects to be Created grid box in the PeopleSoft system.

Files eligible for importing and for object creation must be an XML type file. The system searches the file for new object blocks to upload each object. If the tag is located, then it will look for the attributes of the new_clause, id, title, full text, and by reference tags. If a new_clause tag is not found in the entire file, then the system parses the file content as one object, all text goes into the Full Text field, and the title is left blank.

If, within the content of each new object block of text, the system does not find a title tag, it parses all text within the block as full text. Otherwise, the system parses the tagged content according to the content type, such as full text or by reference text.

See Chapter 11, "Importing Clauses, Sections, and Documents," Understanding the Object Import and Creation Process, page 399.

Objects to Be Created

Use this grid box to review and change information about objects before you create them. The grid is not populated until you select to upload an XML file.

See Chapter 11, "Importing Clauses, Sections, and Documents," Reviewing and Updating Imported Clause and Section Details, page 412.

Result of Last Create

Use this section to review the results of the last object creation process you initiated using the Create Selected Objects button. The section has no data until you create or attempt to create objects for placement in the contract library.

See Chapter 11, "Importing Clauses, Sections, and Documents," Creating Clauses and Sections and Resolving Errors, page 417.

Create Document Configurator

Use this section to create a document configurator after you import objects to the system but before navigating away from the Import Clauses/Sections page. When the page initially appears, the Create button is not available for use. After you import objects and upload them to the contract library, the button becomes available. You can continue to import and upload objects that will be a part of the configurator. You can only create the configurator once, so ensure that you've included all the objects for use with the configurator. After you create the configurator, you can maintain it and add additional objects using the Document Configurator Definition page.

See Chapter 11, "Importing Clauses, Sections, and Documents," Creating a Document Configurator During Object Import, page 421.

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Importing Objects to the Import Clauses/Sections Page

Access the Import Clauses/Sections page (Supplier Contracts, Manage Contract Library, Import Clauses/Sections).

To import and upload a object file from a local system to the Import Clauses/Sections page:

1. Use the Default for Object Attributes section to enter common data for objects that you want to upload.
2. Click the Select XML File button.

   If you have not loaded other files during this session, go to step 3.

   Depending on if you have already uploaded a file during this import session, the system will either append new objects to this grid or remove the objects 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.
3. Click the Select XML File button to browse for the file on a local system.

   The file must be an XML file and created using Microsoft Word. If the file consists of multiple objects and each object has a specific ID, title, full text, and by reference attributes, then the XML elements should be applied to each object to indicate each object attribute. To tag clauses in the Microsoft Word document you need to first add the PeopleSoft clause schema so that each object in the file can be tagged with the correct new_clause, id, title, full text, and by reference element. Otherwise, the system will not be able to read the uploaded file for individual objects, and will treat the file content as one object.

   See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Clause Import XML Schema Setup, page 206.
4. 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 how they are tagged in the file.

   Note. The system automatically collapses the Defaults for Object Attributes group box when you return to the page after uploading files.

After uploading the file, the Object ID field appears blank unless you:

- Selected a numbering option to extract it from the object title, and the uploaded object has a title tag.
- Selected to use automatic numbering; the field will contain *NEXT*.

  When you create objects and the automatic numbering option is selected, the system assigns the new number based on the starting sequence.
- Uploaded each object in the file with an *id* tag.

See Chapter 11, "Importing Clauses, Sections, and Documents," Creating Clauses and Sections and Resolving Errors, page 417.

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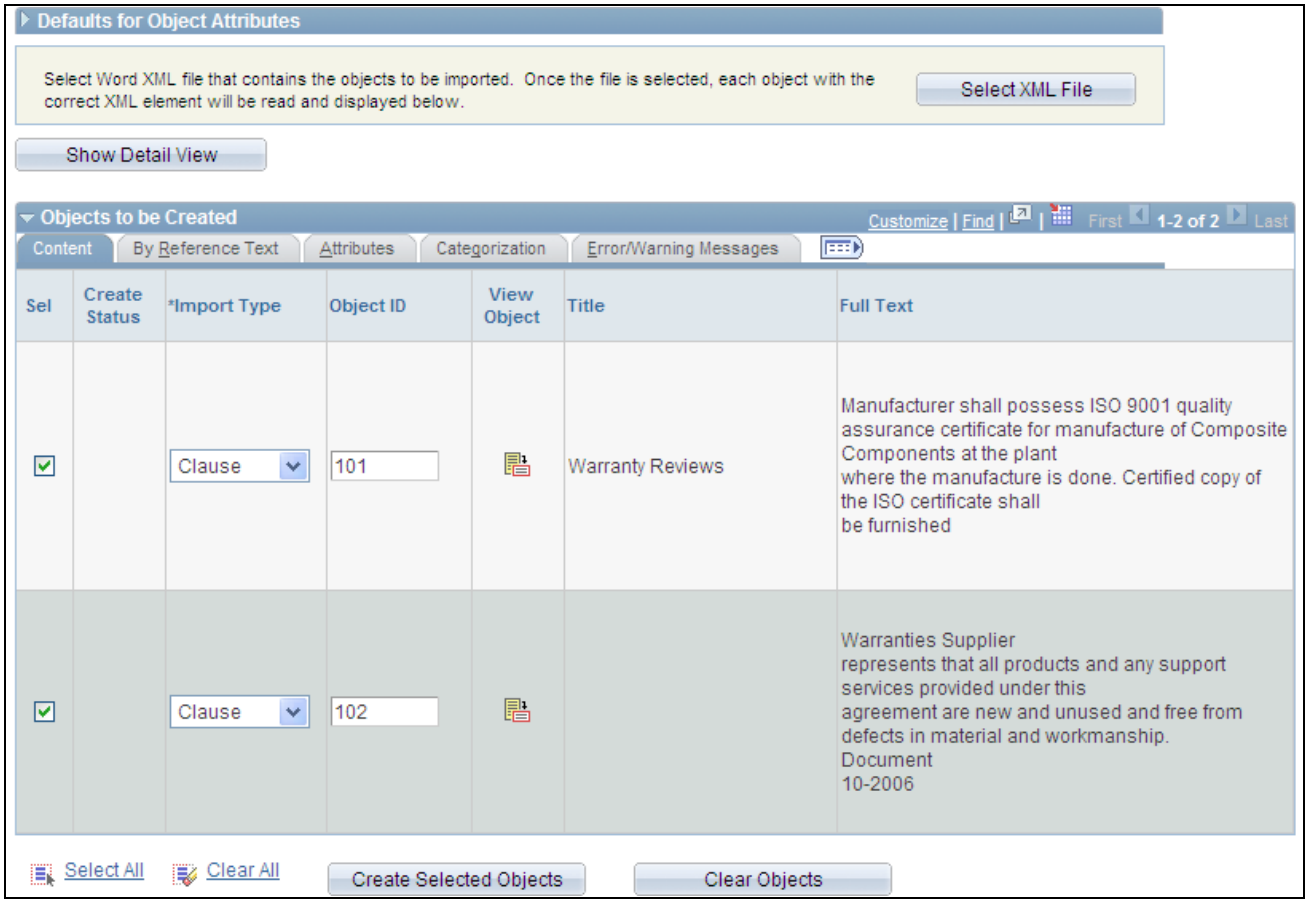
Reviewing and Updating Imported Clause and Section Details

Access the Import Clauses/Sections page (Supplier Contracts, Manage Contract Library, Import Clauses/Sections).



Import Clauses/Sections page: Content tab

After uploading the XML file, use the Objects to be Created grid box to review and update objects before you complete the import for the selected file by creating the objects in the contract library. Two display views are available–summary and detail. The summary view that appears in the previous page example enables you to maintain objects using tabs. The detail view enables you to review and maintain all fields for each object on the same page. One button is used to toggle between the two views. This section describes object import using the summary view.

Show Detail View Click this button to maintain the details for one object at a time. The button is not available for use until you upload an XML file and the system parses the objects. The detail and summary views have the same information; only the page layout is different.

Show Summary View Click this button to maintain uploaded objects using a grid and tab format. The button is not available for use until you upload an XML file. The system adds each object extracted from the file to the grid. The summary view is the default value for the view.

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Sel (select)

Select this check box to include the corresponding object as part of the object creation process. The default value for the check box is selected. When you click the Create Selected Objects button, the system processes selected objects.

Create Status (status indicator)

This indicator appears when the corresponding objects were successfully created and added to the contract library. The Sel check box is not available after an object is created.

Create Status(status indicator)

This indicator appears when the corresponding objects have errors associated with them. An error means that a problem is associated with the uploaded object, such as missing information in required fields; the system does not create the object. Select the Error/Warning Message tab to view the errors. These required fields must have a value:

- Import Type
- Object ID
- Effective Date
- Description
- Class Name

If you select the Error on Duplicate Title or Error on Duplicate Description check box, the system generates an error if the title or description was already used in the contract library for a different clause or section. The errors that appear on the Error/Warning Message 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.

Create Status (status indicator)

This indicator appears when the corresponding objects are created with warnings. The system creates the object in the contract library, but it provides you with warning information. An example of a warning message is when bind variables that are not valid exist in an object and the approval status is being reset to *Initial* from *Approved.* You will need to correct the binds in the object using the Clause Definition or Section Definition page before you can approve the clause or section for use. The system displays a warning when you add a new effective-dated row to an existing object, the value for a object ID is truncated to 20, or the title is truncated to 254 characters.

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Import Type

Select an object type that you want to assign to an imported file. When you upload the file into the contract library, the system processes the file into the system based on the object type you select. When the system creates the parent object, it adds all child clauses in the order that they appear on the grid. If you want to change the order after you create the clauses or sections, you must use the Section Definition or Clause Definition pages.

Import types include:

- *Child:*

  Select if you want to create this object as a clause, and in addition, add it as a child clause for the clause or section listed in the grid. Selecting Child enables you an option to create an entire section with child clauses or clauses with dependent clauses as part of the import process. This is useful when you determine that you will reuse sections or clauses with dependent clauses in the library.

  Note. Even if you decide not to create new content as child content in the library during the import process, you can always go to the Section Definition or Clause Definition pages to create these parent/child relationships after you import the objects.

  A child clause must belong to a parent clause or section. To import a child clause, you must first select to create an import type of Clause or Section in the row above this clause. Then, you can select *Child* as an object type in the row below the clause or section. If you attempt to create a child clause without a parent, the system displays an error message after you click the Create Selected Objects button.

  All child 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 clause that the date was changed. This default prevents child objects that are not valid for the parent object. When the system processes a child object and errors occur in the processing, then the parent object will not be created until the child errors are corrected.

  If the parent object that you are creating already exists, then the system updates only the header information. The section structure or clause dependents will remain the same as the previous effective-dated row of the parent object. The only time the systems creates a section structure or clause dependents for the parent object is when the parent object is a new object.

  The system displays a message if you indicate that a child object exists but leave the Sel check box deselected, and you select to create a section or clause. This warning ensures that you did not unintentionally deselect the check box for the child. If you select *No* in the message box, the system stops the processing and you can make changes. If you select *Yes,* the system creates the section clause without the child object. After the system creates the parent, you cannot add the child clause to the parent using import. Instead, you must do it manually from the clause or section itself.

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Note. When you create a child clause, the system creates the clause as a standalone clause and also attaches the child clause as a dependent clause for the parent clause.

- *Clause:* Select to create a clause using this object. If you are creating a child clause for use with a clause, you should select *Child* as the import type on the line below the current clause line. When the objects are created in the contract library, they are created in an Active status. If a clause is followed by a child clause in the Objects to be Created grid box, the child clause appears as a dependent clause on the Clause Definition page for the parent clause.
- *Section:* Select to create a section using this object. Selecting Section enables an option for 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 determine that you will reuse sections in the library.

Note. Even if you decide not to create new section content as child content in the library during the import process, you can always go to the Section Definition or Clause Definition pages to create these parent/child relationships after you import the objects.

When you select this import type, the system removes values from the Object to be Created grid box that relate only to clauses. For example, on the Categorization tab, values are removed from the Class Name,Approval Type, and Library fields because they relate only to clauses.

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.

Object ID Displays the ID for this clause or section when it is created. Depending on the clause and section numbering and whether the object has an *id* tag, the field might be blank or contain a value. The field is required and, if it is blank, you must enter a value before you select to create the object.

View Object Click this button to view an object in the Clause Definition or Section Definition component 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 Create Selected Objects button.

Title Displays the value within the *title* tag in the XML file. If the tag in the uploaded file has no value, then this field is blank. Using titles is recommended for sections and clauses when possible because you can number them separately when documents are assembled. Titles are also useful for creating table of contents in Microsoft Word.

Full Text Displays the text within the *Full Text* tags in the uploaded XML file. If the object does not contain a full text tag, then all text within the new_clause block is the full text.

Select All Click this link to select all objects for object creation.

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Clear All Click this link to clear all selected objects. This action enables you to select only the objects that you want to create.

Create Selected Objects Click this button to create objects that you have selected in the Objects to be Created grid box.

See Chapter 11, "Importing Clauses, Sections, and Documents," Understanding the Object Import and Creation Process, page 399.

Clear Objects Click this button to remove all objects from the Objects to be Created grid box. You can access the Defaults for Object Attributes group box to make changes to the attributes before you select the next file in which to upload more objects.

By Reference Text

Select the By Reference Text tab.

Use this tab to view by-reference text that was included with the object import. This field is blank unless an individual object in the file has a by reference tag within a new_clause tag. If the import type is section, values do not appear in this field.

Attributes

Select the Attributes tab.

Use this page to view and update the Import Type and Object ID fields, along with a couple of required fields and notes. If you set up default attribute values, fields on this tab will initially display those values after you upload the selected XML file.

See Chapter 9, "Managing the Contract Library," Defining Clause Information, page 309.

Effective Date Displays the default value that you defined using the default attributes. If you did not enter a default value, the field is blank. You can either enter a value or override the current value. The effective date determines when the object is available for use. This field is required.

Effective dates can be overridden for individual objects. Normally, when you initially import objects to create the object 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 contract or ad hoc document that you need to generate based on the contract or ad hoc start date.

Description Displays the object description. Clause and section descriptions are required. You can either enter a description or override the default *title*.

Notes Displays the default value you entered in the Notes field. If you did not enter a default value, this field is blank.

Categorization

Select the Categorization tab.

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Use this page 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.

Numbered Select to indicate that all objects created during this import session should be numbered. The system uses the Numbered feature to determine the use of the paragraph style and numbering as defined within the system's Microsoft Word template with this clause or section when creating a document.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Document Templates and Styles, page 252.

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 that you are importing.

Insert Page Break Prior Select to indicate that you want a page break before this object in a contract document.

Protect in Document Select to indicate that a clause or section should be protected when it is included in a contract document. You can override the value that you defined 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 import types do not have values for this field.

See Chapter 9, "Managing the Contract Library," Defining Clause Information, page 309.

Error/Warning Messages

Select the Error/Warning Messages tab.

Use this page to review warnings and error messages resulting from the last object creation process.

See Chapter 11, "Importing Clauses, Sections, and Documents," Creating Clauses and Sections and Resolving Errors, page 417.

Creating Clauses and Sections and Resolving Errors

Access the Import Clauses/Sections page (Supplier Contracts, Manage Contract Library, Import Clauses/Sections).

Use the Objects to be Created grid box to select objects for creation in the contract library. After selecting to create the objects, you use the Error/Warning Message tab to review errors and warnings produced by the system for objects that failed to create. You also use the Result of Last Create section to review how many objects were processed and how many were created.

During the creation process, the system makes three passes through values on this page to process the imported objects. On the first pass, it processes all child clauses. After it creates the child clauses, the system makes a second pass and creates all clauses and clauses with dependents. Finally on the third pass, the system creates sections and sections with a clause structure.

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Create Selected Objects Click this button to create the object or objects you selected in the Objects to be Created grid. The system uses the Clause Definition and Section Definition component to create objects and validates each object for errors and warnings.

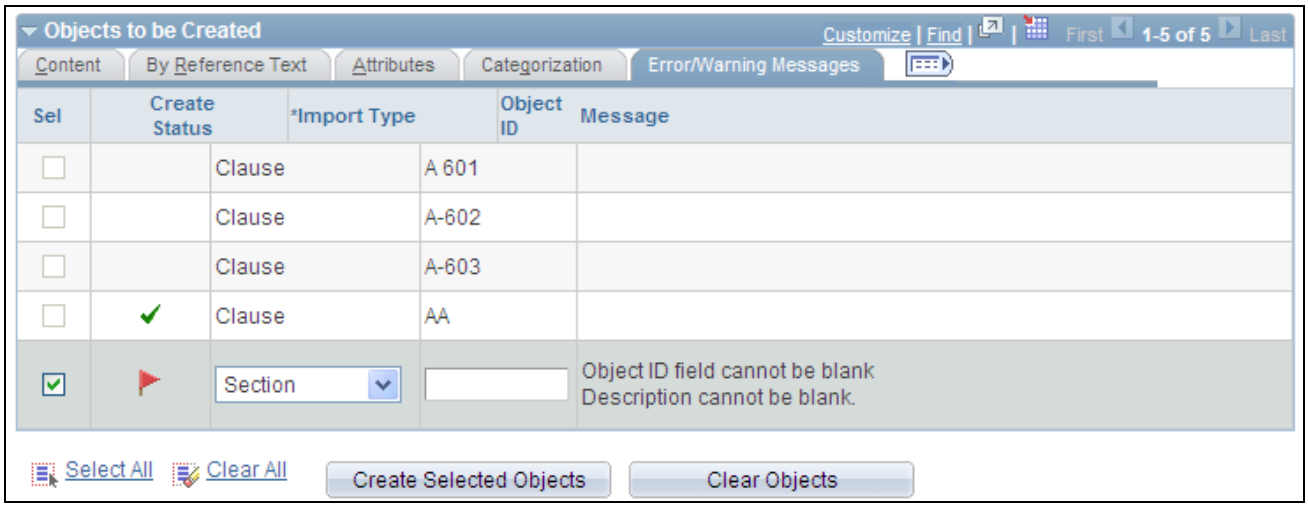
After creating the object, the system displays the results in the Results of Last Create section and dims all fields for objects that were created successfully. It also provides a link to the Clause Definition or Section Definition page. To view the clause or section, click the View Object button next to the Object ID column on the Content tab.

Clear Objects Click this button to remove all objects in the Objects to be Created grid. You cannot cancel the action after you select to deselect the object, and the removal is immediate. You can upload the objects again if you want to continue working with them after you deselect them. You can select to clear the objects in the grid if you want to enter a default value for the Effective Date field so that you do not have to enter a date for all the uploaded objects. This action enables you to set up the default value again and to select the file in which to upload objects.

Note. When you clear objects from this page, you also clear values for the document configurator.

Resolving Import Errors and Warning Messages

Access the Error/Warning Messages tab (Supplier Contracts, Manage Contract Library, Import Clauses/Sections).



Import Clauses/Sections page: Error/Warning Message tab

The Message column displays all the errors and warnings generated by the system when you selected to create objects. Status indicators display immediately after the system completes processing objects for inclusion in the contract library. The indicators appear next to each selected object and signify if the object was successfully completed, had import errors, or system warnings.

The Import Clauses/Sections page shows errors that the system produced 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. In that case, the system loads the data and provides a warning message that a new effective-dated row was added.

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The system uses the Clause Definition and Section Definition component interfaces to create objects. The system creates the interface, and the interface returns error messages in *psmessages* of the session object.

This table describes possible errors and how to fix the objects:

Error	***Resolution***
Cannot add clause because effective-dated row *01/01/xxxx* already exists.	If your intention is to add another effective-dated row, then 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 possibly found a duplicate clause or section. Change the clause description or deselect the Error on Duplicate Description check box in the Defaults for Clause Attributes group box as needed.
Description cannot be blank.	Enter a value in the Description field on the Attributes tab in the Clauses to be Created grid.
Title was already used for another clause.	The system has possibly found a duplicate clause or section. Change the clause title or deselect the Error on Duplicate Title check box in the Defaults for Clause Attributes group box as needed.
Clause ID field cannot be blank.	Clause ID is a required field. Enter a unique value in the field.
Effective Date 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 you allow content to 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 possible warnings and how to fix the objects:

Warning	***Resolution***
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 Clause Definition page to access the clause and determine how to fix the bind.
Clause already exists; added a new effective dated row *01/01/xxxx*.	You do not need to take an action. This warning informs you that the system adds 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.

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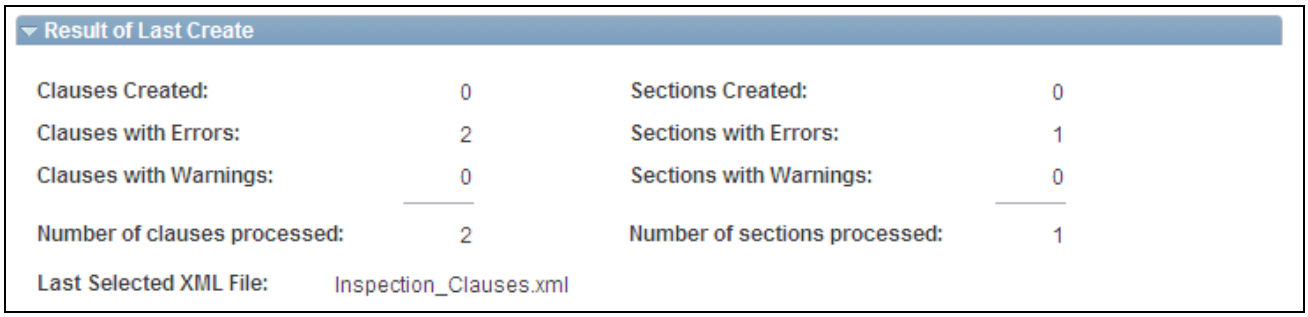
Warning	*Resolution*
Value for Title is too long and is truncated to 254 characters: *<Title value from file>*	No action is needed.
Clause already exists; added a new effective-dated row *effective date*	No action is needed.
Dependents will not be updated for existing clause.	The import process enables you to add child dependent clauses to newly created parent clauses or sections as part of a specific import. These child clauses must be manually added as a dependent clause using the Clause Definition or Section Definition page after you complete the import.

Viewing Results of the Last Object Creation Process

Access the Result of Last Create grid (Supplier Contracts, Manage Contract Library, Import Clauses/Sections).



Import Clauses/Sections page - Result of Last Create section

Use this section to review how many clauses were processed and how many were created. The results are refreshed upon completing each file upload to the contract library.

Note. Child clauses are included in the clause count column.

Clauses Createdand **Sections Created** — Displays the number of clauses or sections that were added to the contract library during the most recent object creation processing.

Clauses with Errorsand **Sections with Errors** — Displays the number of clauses and sections that had errors during the last object creation processing. Objects that have errors upon creation are not uploaded to the contract library.

Clauses with Warnings and **Sections with Errors** — Displays the number of clauses and sections that had warnings during the last object creation processing. Objects that have warnings are loaded into the contract library, but you should review the object using the Clause Definition or Section Definition page before using it in a document.

Number of clauses processedand **Number of sections processed** — Displays the total number of clauses and child clauses and sections that the system evaluated and processed during the most recent object creation upload process.

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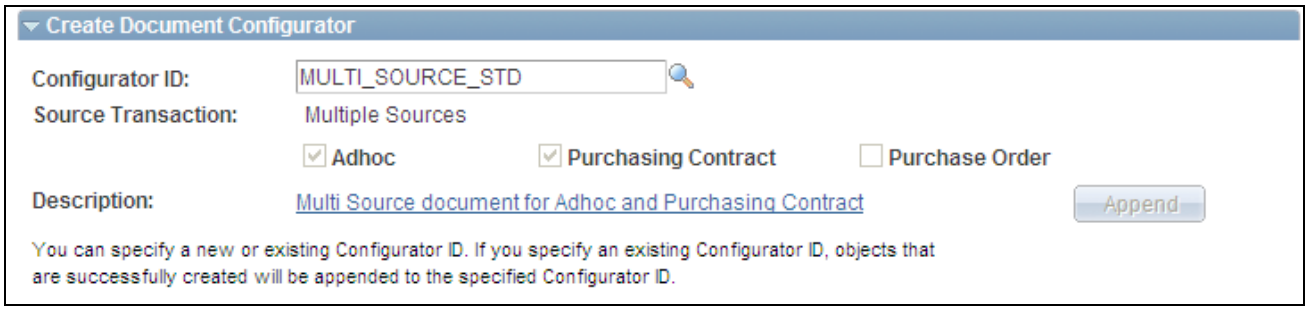
Last Selected XML File Displays the most recent XML file name that was uploaded to this page. If you have imported multiple files, only the last one appears in this field.

Creating a Document Configurator During Object Import

Access the Import Clauses/Section page (expand the Create Document Configurator on the Import Clauses/Sections page).



Import Clauses/Sections page: Create Document Configurator section

In addition to uploading sections and clauses, you can use the Import Clauses/Sections page to optionally create a document configurator and assign the imported objects to it after you have uploaded all the objects into the contract library. This feature makes it possible for you to create a configurator using an entire legacy document. After you create objects, you can assign the configurator attributes and click the Create button to create the configurator.

Using the Create button provides you an easy method to create the first pass of the configurator. The configurator and its content will likely require further cleanup and editing after you create it because the newly created content and subsequent formatting of the authored document from the system depends on:

- The content that you have selected for the import.
- The formatting of the content.
- The Microsoft Word template that is use by system at the time it assembles the document for the newly created configurator.

You can perform multiple imports to the Import Clauses/Sections page before creating a configurator; however, after you upload the objects into the contract library and exit the Import component, the objects are not eligible for inclusion in any new configurator you have created during the import from within the Import component. When you upload objects to the contract library, the initial configurator Create button becomes unavailable until you import additional objects to the Import Clauses/Sections page. You can only create the configurator once, so ensure that you've imported all the objects for use with the configurator. After you create the configurator , and if you stay within the Import component, you can import additional clauses from another .xml file and select to append those to the newly created configurator. After you exit the component, this feature is no longer allowed, and you must maintain the configurator to add additional objects.

Note. Click the Clear Objects button to remove all objects and to reset the fields for the document configurator.

When creating the document configurator, the system:

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- Assigns the same setID as specified on the Import Clauses/Sections page.
- Sets the configurator availability status to In Process.
- Uses the Microsoft Word template that is specified in document and options 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.

After you create the configurator, the Create button is no longer available and the configurator information is dimmed.

Configurator ID

Enter a unique ID for the configurator. You must define configurator details before you click the Create button.

If you import additional objects after you create a document configurator, you cannot add them to the configurator. You can use the Document Configurator Definition page to add new objects to the configurator.

Source Transaction

Select which type of source transaction you want to assign to the configurator. You can use a configurator for only one valid source transaction. Valid values include:

Ad Hoc: Select to use this configurator to generate ad hoc contract documents.

Multiple Sources: Select to use this configurator to create any combination of source transaction documents, including ad hoc, purchase orders, and purchasing contract documents.

Purchase Orders: Select to use this configurator to generate contract documents based on a purchase order.

Purchasing Contracts: Select to use this configurator to generate contract documents based on a purchasing contract.

Description

Enter a description for the configurator. After you create the configurator, the system uses the description as a link to the Document Configurator Definition page, where you can update the configurator and preview the related Microsoft Word document for the configurator that you created.

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Create Click to add the document configurator to the database. After the system creates the configurator, the Create button is no longer available.

Note. You must specify the details for the configurator before you click the Create button.

During configurator creation, the system:

- 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.

See Also

Chapter 9, "Managing the Contract Library," Defining Document Configurators, page 337

Reviewing a Document Configurator Created During Object Import

This section provides an example of how the system creates a document configurator during object import and how the configurator appears after it is created.

Access the Import Clauses/Sections page (Supplier Contracts, Manage Contract Library, Import Clauses/Sections).

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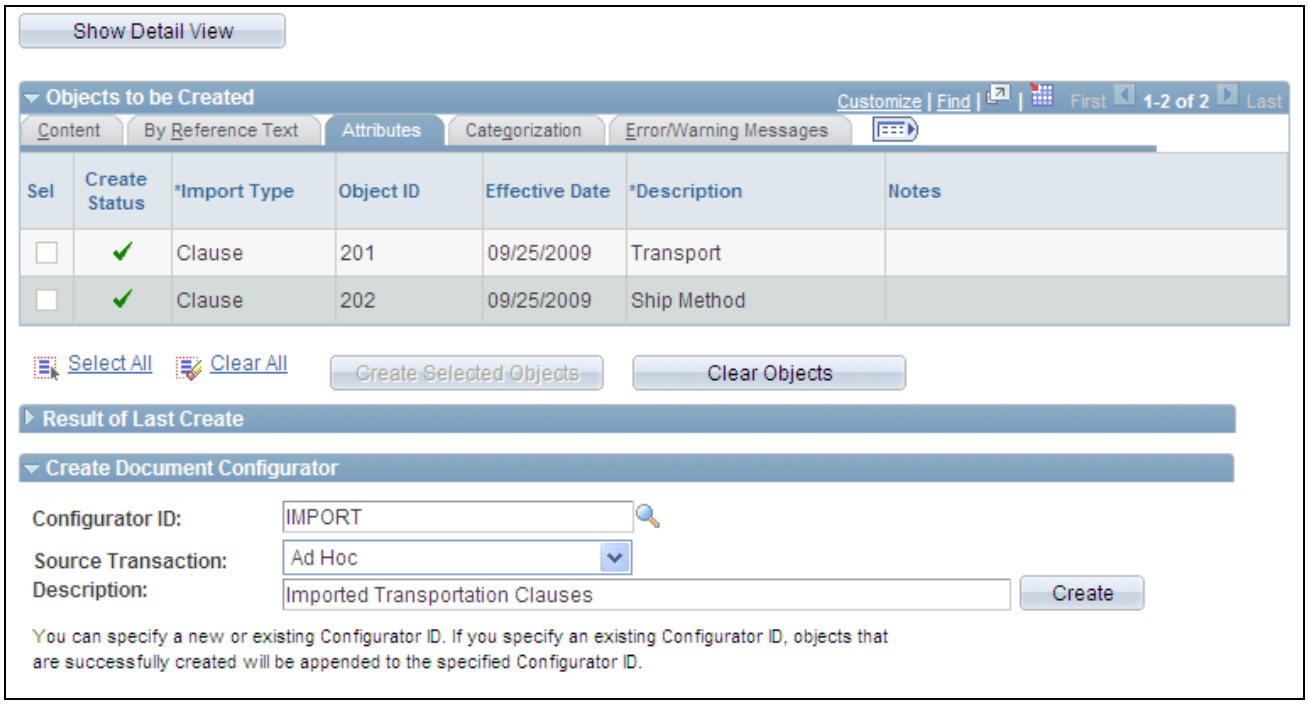

Example of Import Clauses/Sections page with new document configurator

The previous example shows a simple contract section *(Section A-5)* with a clause and two child clauses. The objects are sequential for use in the configurator and are already created in the contract library. At this point, you can import another file to append the Objects to be Created grid box or, if you want, define attributes for a configurator based on the objects. To create the configurator, click the Create button.

After creating the configurator, access the Document Configurator Definition page (Supplier Contracts, Manage Contract Library, Document Configurators). Select the configurator that you created when creating objects in the contract library.

This example shows the Content Elements grid on the Document Configurator Definition page:

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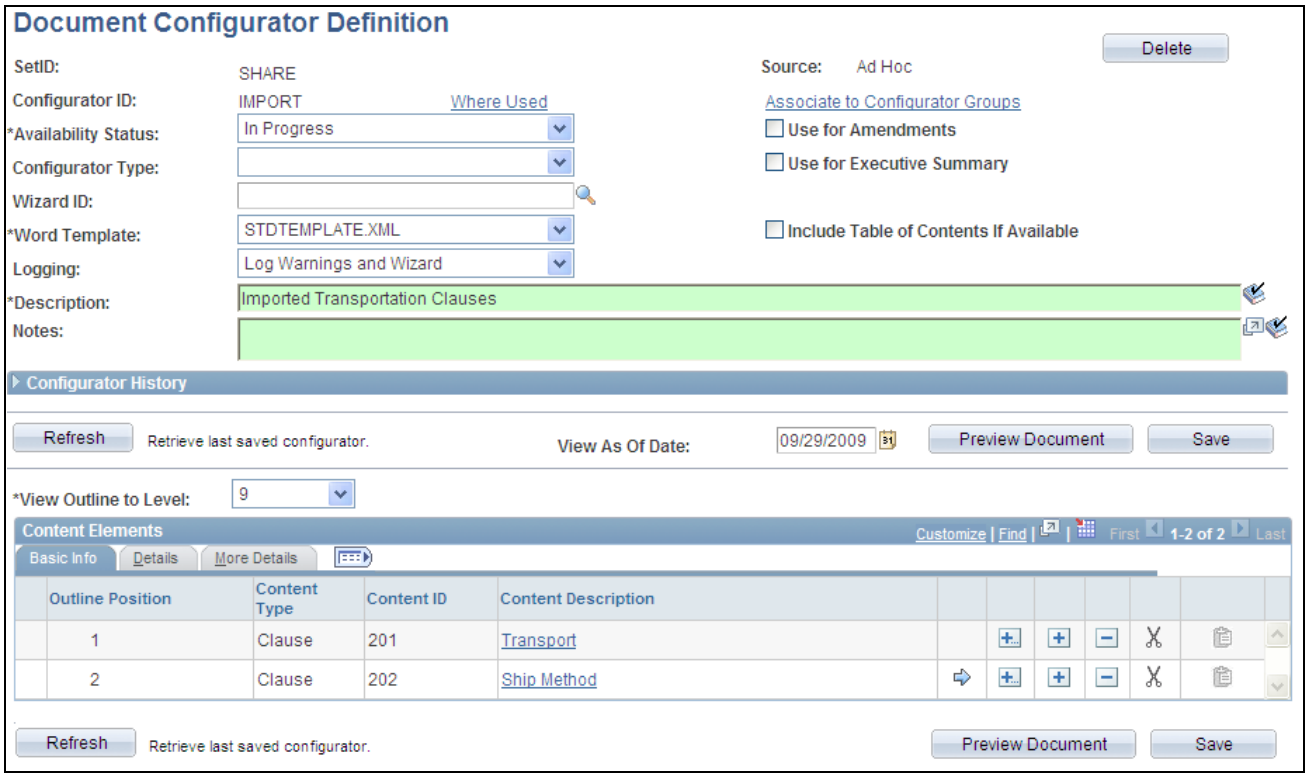

Example of Document Configurator Definition page with new imported clauses

This example shows the new configurator and the structure that was defined on the Import Clauses/Sections page. The system has applied the sequential order of the objects to outline positions in the configurator. You can click the Preview Document button to view the section. At this point, you can update the configurator using this page.

See Also

Chapter 9, "Managing the Contract Library," Defining Document Configurators, page 337

Importing Contract and Ad Hoc Documents

This section provides an overview of document import and discusses how to:

- Import current document versions.
- Import amended contracts.
- Import amended contracts and amendments.
- Import original contracts and amendment files.
- Import previous document versions.
- Change the source transaction for an imported ad hoc document.

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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 those preexisting contracts and documents that were not created in the document authoring system. For example, you might choose to import a legacy document that is still an active contract so that you can collaborate on it, approve it, and, if the document format is supported by Verity searches, include it in document searches.

You can create imported documents in a Draft or Executed status, and import additional supplemental files or contracts as additional attachments for the current executed version. 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 Management page to 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.

Note. Before a document administrator can use the import feature, you must select for the administrator to have import document authority using the User Preferences page.

You can import and then, depending on the type of file, view and edit the document through the document authoring system. Examples of documents that you can import include:

- Microsoft Word documents with a variety of extensions, including .doc and .xml.
- Microsoft Excel spreadsheets.
- Adobe Acrobat documents (.pdf files).

Note. While the document authoring system creates and processes Microsoft Word 2003 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.

See Chapter 13, "Managing Document Life Cycles," Adding Authored Documents, page 482.

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 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 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 contract 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.

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You can import the current version of a draft or an executed contract. 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 contract. Imported documents cannot use the Refresh feature intended for generated documents. Also, after you initially import a document or contract, you can use the Import Prior Document button on the Document Management page to import previously amended versions of the contract or document. 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 Verity content search will only search for the most current amendment of the contract

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, if you are using document types, 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 contracts and documents as part of the document creation process. The system provides an Import Document button for ad hoc, purchase order, and purchasing contract documents. You can import documents having an ad hoc source or ones related to transactional purchasing contracts or purchase orders depending on their use. When you relate a document to a transactional purchasing contract or purchase order, the transactional contract or purchase order must already exist in the system.

After importing documents, you can:

- 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 Chapter 11, "Importing Clauses, Sections, and Documents," Importing Amended Contracts and Amendments, page 434.

- Add attachments, such as supplement documents to the current version.

  See Chapter 13, "Managing Document Life Cycles," Viewing and Uploading Attachments and Related Documents, page 554.

- 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 Verity searches to search for content in imported documents for document types that are supported by Verity searching.

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 existing PeopleSoft Purchasing transactional records.

You begin by accessing either the purchasing contract, purchase order contract, or the Document Management component, and then you:

1. Ensure that user preferences are set up to permit users to import documents.

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2. Select to add a document and define the document basic information.
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.

See Also

Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," page 679

Pages Used to Import Contract and Ad Hoc Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Import Document	CS_DOC_IMPORT	• 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.	Import current document versions, amended contracts, amended contracts and amendments, and original contracts and amendments.
Import Document	CS_DOC_IMPORT	Supplier Contracts, Create Contracts and Documents, Document Management Click the Import Prior Document button on the Document Management page.	Import previous document versions.

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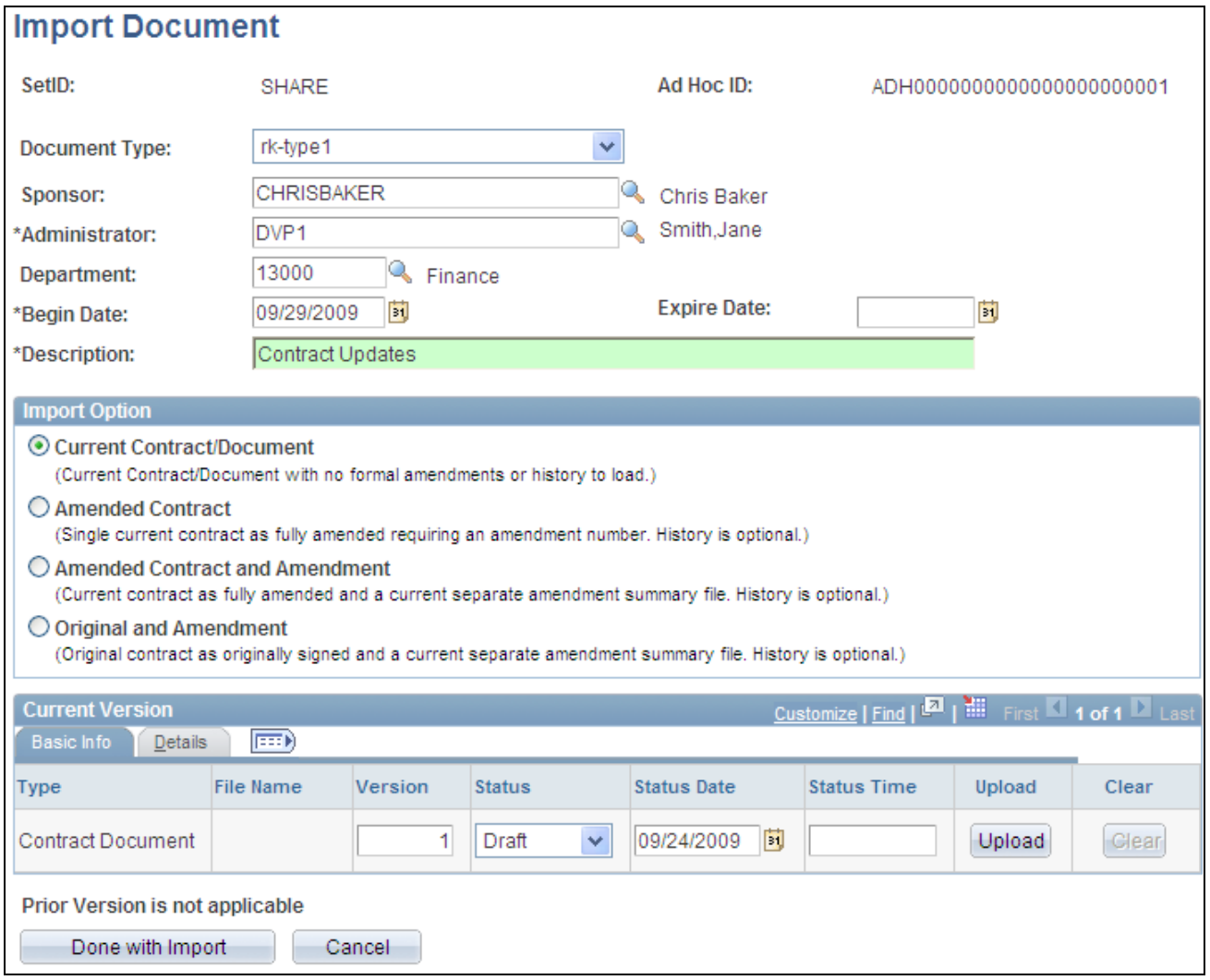
Page Name	Definition Name	Navigation	Usage
Change Source Transaction	CS_DOC_ACTIONS_SP2	Supplier Contracts, Create Contracts and Documents, Document Management Click the Change to New Source button on the Document Management page.	Change the source transaction for an imported ad hoc document.

Importing Current Document Versions

Access the Import Document page (Supplier Contracts, Create Contracts and Documents, Document Management, and click the Import a Document button).



Import Document page: Basic Info tab

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Use this page to add information about the document that you are going to import. The SetID, Ad Hoc ID, Sponsor, Administrator, Department, Begin Date, Expire Date, and Description fields are the same as the fields on the Create Document and the Document Management pages.

See Chapter 13, "Managing Document Life Cycles," Common Elements Used in This Chapter, page 480.

Note. The User Defined Fields section is available for use with document import 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.

You use the Import Option group box to select how you want the system to process the imported document. Depending on the option you select, the Current Version grid box 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 because the option cannot be changed once and amended contract is imported

Current Contract/Document 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 *Draft, Complete Statuses Only,* or set to *Draft, Approve Statuses Only.*

When you upload the document, you can set the status to *Draft, Completed, Approved,* or *Executed,* depending on the use of a document type and its settings. In *Draft* status, the Status Date field must have a date less than or equal to today's date.

Amended Contract 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 Chapter 11, "Importing Clauses, Sections, and Documents," Importing Amended Contracts, page 432.

Amended Contract and Amendment 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 Chapter 11, "Importing Clauses, Sections, and Documents," Importing Amended Contracts and Amendments, page 434.

Original and Amendment 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 Chapter 11, "Importing Clauses, Sections, and Documents," Importing Original Contracts and Amendment Files, page 436.

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Type

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 contact document or a separate amendment file. Values depend on the import option you selected. For the Current Contract/Document option, the type is *Contract Document.*

File Name

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.

Version

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.

Status

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 *Draft* or *Executed.* If document types are being used, the list of values depends on applicable statuses defined on the Document Type page.

If the applicable status is set to *Draft, Complete Statuses Only,* then the status value can be either *Draft* or *Complete.*

If the applicable status is set to *Draft, Approve Statuses Only,* then the status value can be either *Draft* or *Approved.*

If the applicable status is set to *Full Life Cycle Statuses,* then the status can be either *Draft* or *Executed.*

Status Date

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 Created On field with the status date you enter when you complete the import.

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.

Other values updated on the Document Management page using the status date include:

Executed and Executed On date fields when the status is *Executed.*

Approved and Approved On date fields when the status is *Approved.*

Completed and Completed On date fields when the status is *Complete.*

Status Time

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.

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Upload Click to access the Upload Contract Document page. Then, you can click the Browse button to upload the document or contract file that you want to import from the local system. After you select the file, click the Upload button to load the document into the Basic Info tab.

Clear 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.

Done with Import 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 Yes button, the system continues to save the imported data. You cannot re-import or make any changes to the data after it is saved.

If you click the No 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.

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.

Cancel 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.

Details Tab

Select the Details tab.

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

Access the Import Document page and select the Amended Contract import option (Supplier Contracts, Create Contracts and Documents, Document Management and click the Import a Document button).

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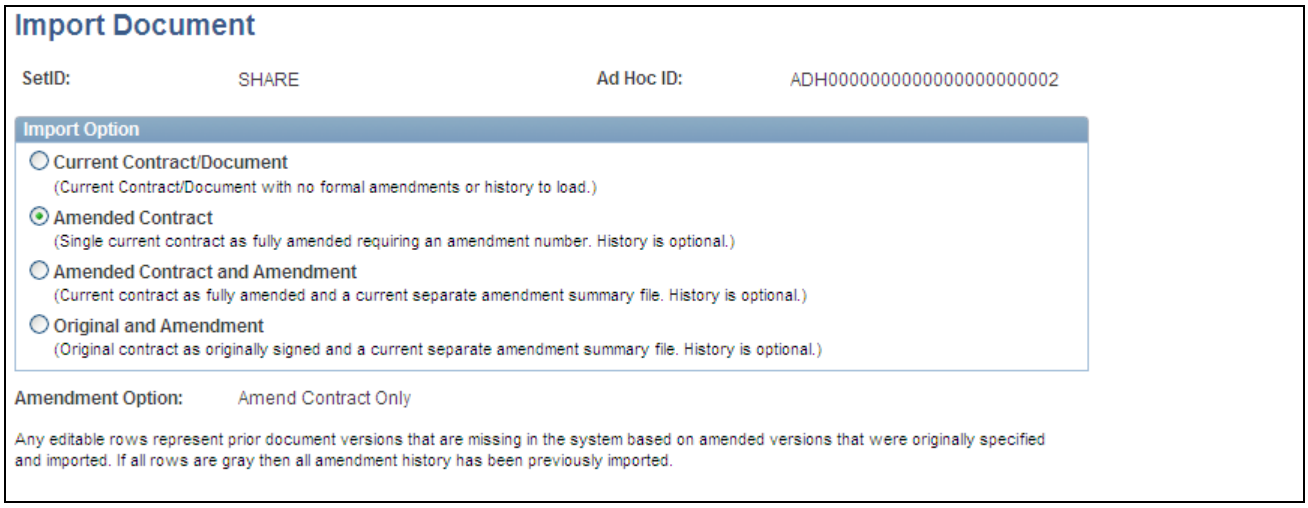
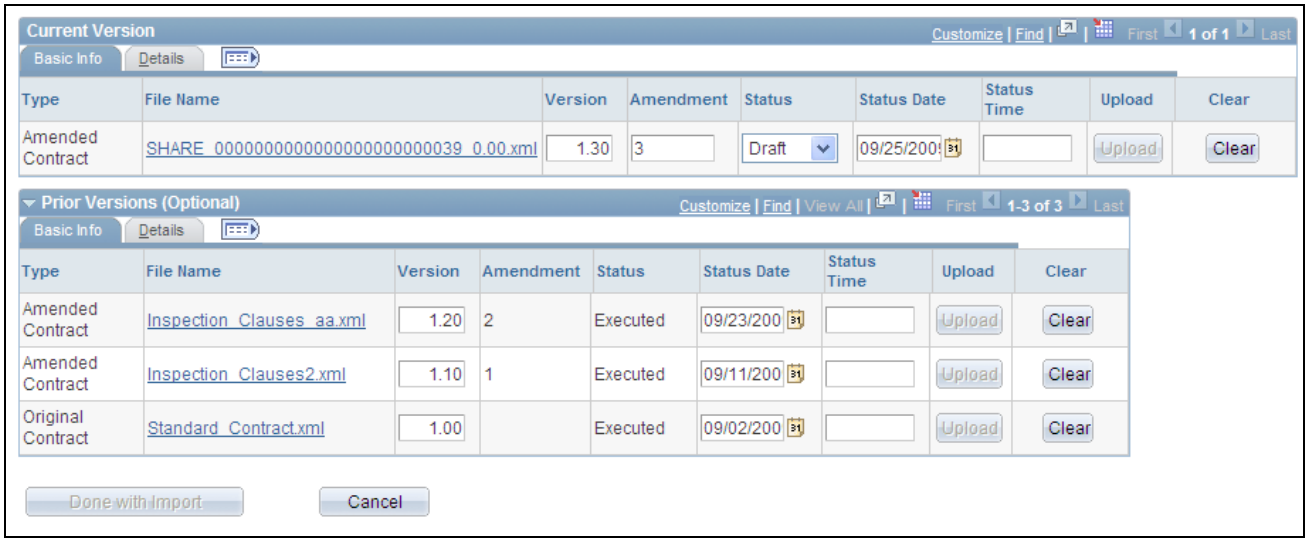


Import Document page: Basic Info tab (1 of 2)



Import Document page: Basic Info tab (1 of 2)

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) grid box.

The system sets the status for all previous versions to *Executed.*

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Type Displays the type of file that the system is going to create upon importing the document.

Amended Contract: 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.

Amended Contract: Appears for previous versions with additional rows based on the value you entered in the current version's Amendment field. The system numbers the amendments based on the amendment number you entered.

Original Contract: Appears for you to upload the original contract. If you do not want to import the original contract, leave the row empty.

Version 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.

Status Date 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 Status Time field to further define the date chronology.

See Also

Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," Understanding Contract Document Amendments, page 679

Importing Amended Contracts and Amendments

Access the Import Document page and select the Amended Contract and Amendment import option (Supplier Contracts, Create Contracts and Documents, Document Management and click the Import a Document button).

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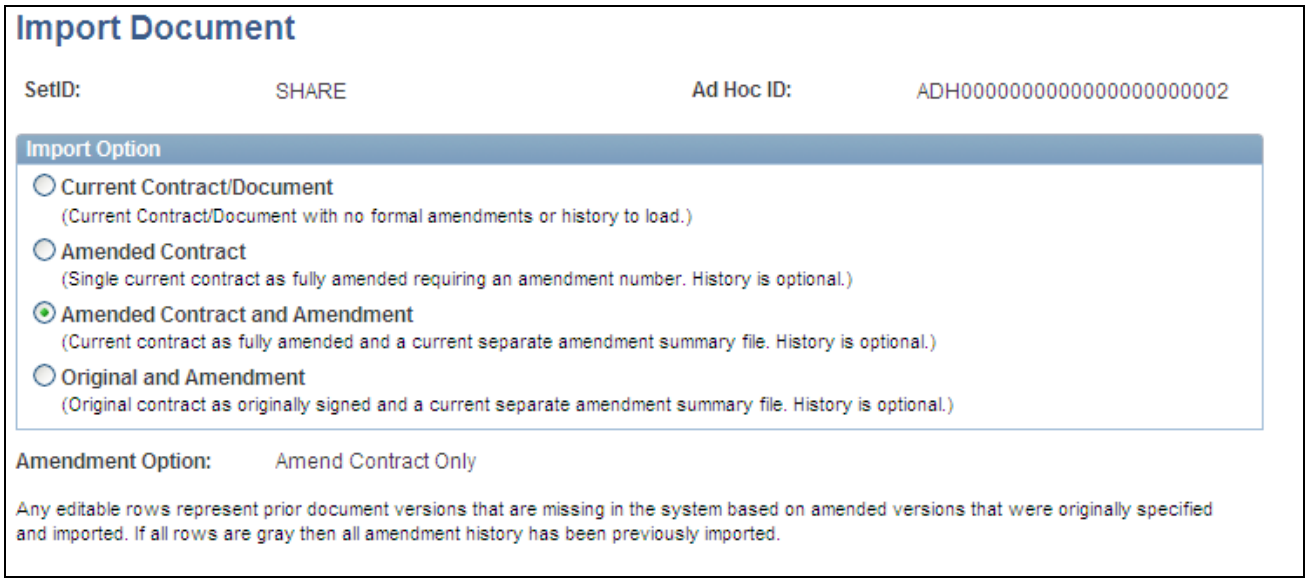
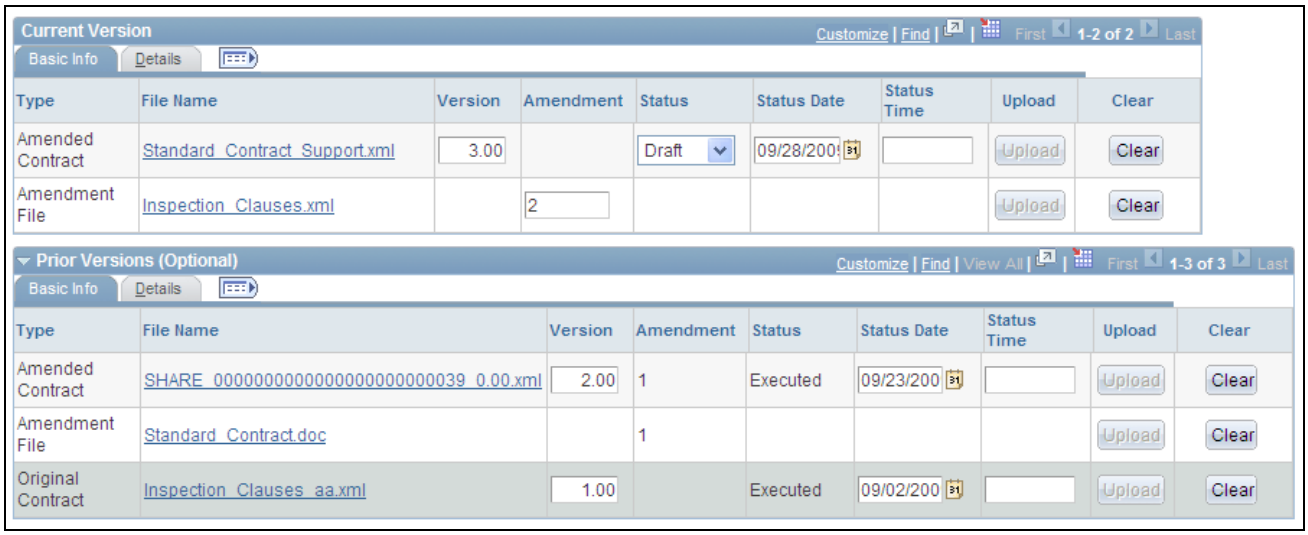


Import Document page: Basic Info tab (1 of 2)



Import Document page: Basic Info tab (2 of 2)

Use this page to import an existing amended contract version along with 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.

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Type Displays the type of file that the system is going to create upon importing the document.

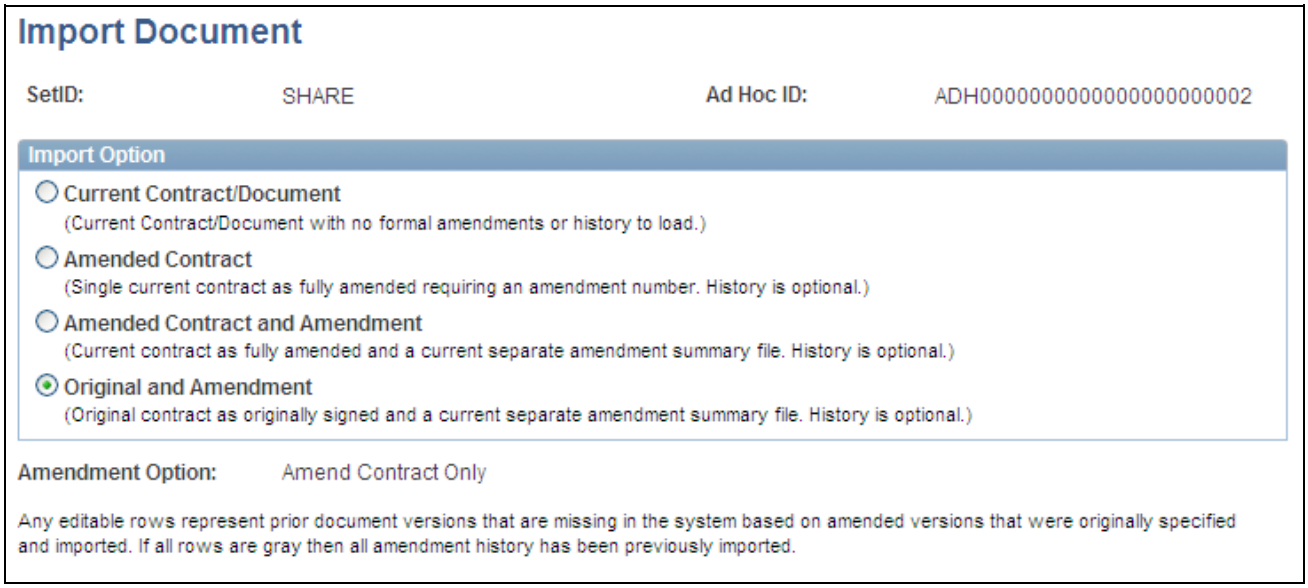
Amended Contract: Appears for the current amended contract. This is the version you are going to upload, and you can select the status at which you want to import it. The *Amended Contract* also appears as the type for previous versions with additional rows based on the value you entered in the current version's Amendment field. The system numbers the amendments based on the amendment number you entered.

Amendment File: Based on the Amendment number entered, the system creates amended contract and amendment file pairs that you can upload.

Original Contract: 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.

Importing Original Contracts and Amendment Files

Access the Upload Document page and select the Original and Amendment import option (Supplier Contracts, Create Contracts and Documents, Document Management and click the Import a Document button).



Import Document page: Basic Info tab (1 of 2)

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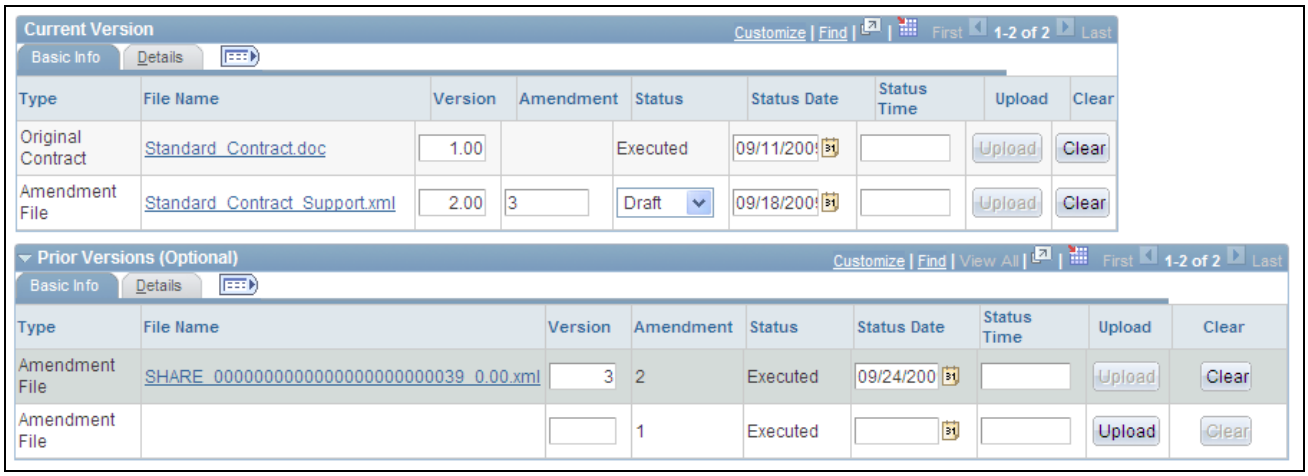

Import Document page: Basic Info tab (1 of 2)

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.

Type

Original Contract: Appears as the current version with an executed status.

Amendment File: Appears as the current version without a preassigned status. If you enter an Amendment field value greater than one as the current version, the system provides the appropriate rows in the Prior Versions (Optional) grid box, and sets the status to *Executed.*

Importing Previous Document Versions

Access the Import Document page (Supplier Contracts, Create Contracts and Documents, Document Management and click the Import Prior Document button on the Document Management page).

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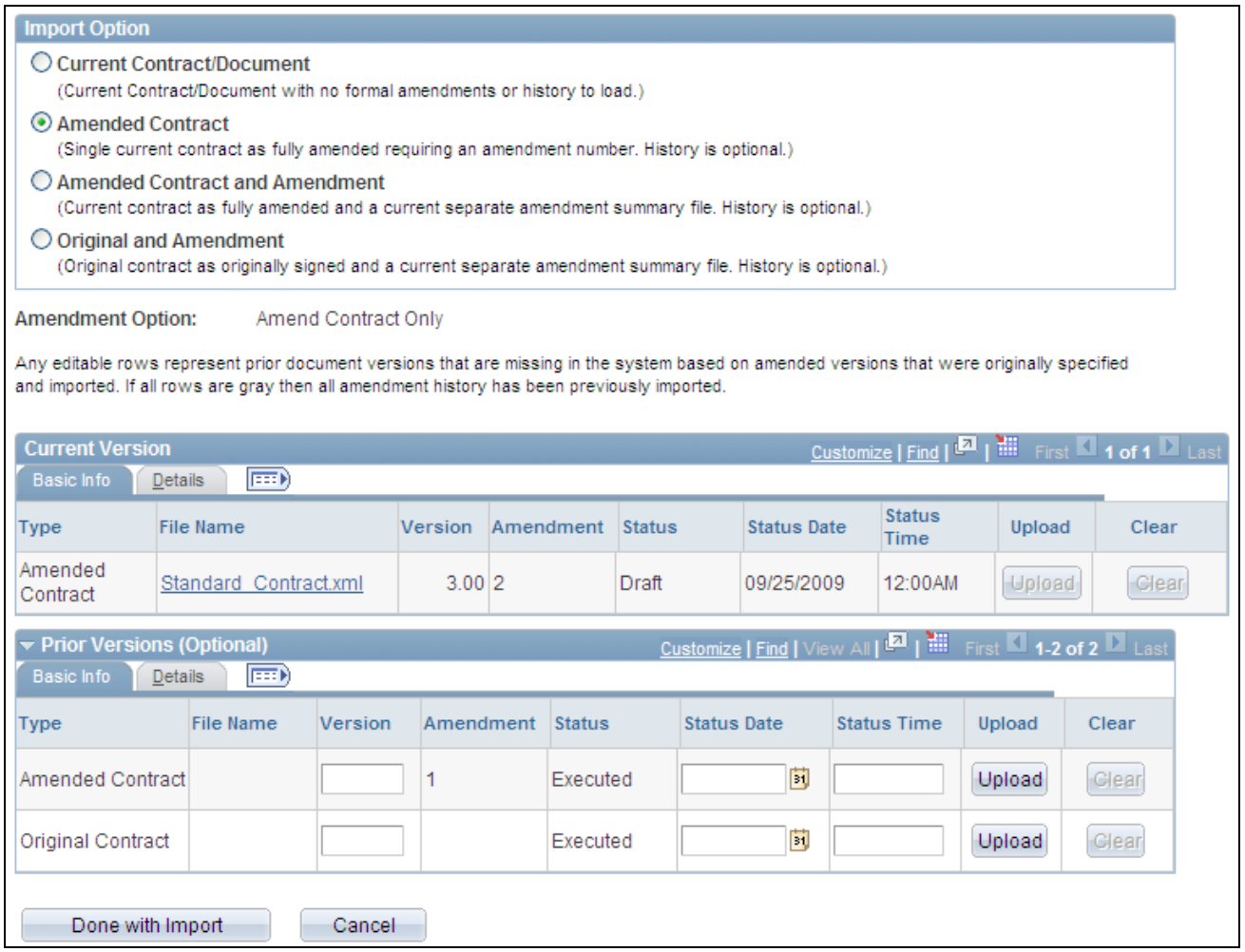

Import Document page

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 generated a document. The button is only available when a document is eligible to have a previous version imported. 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. Ensure that you import any additional previous versions of the document previous to re-creating the document.

Current Version

This grid box displays information about the current version.

If a previous version has already been uploaded, the system displays that information in the Current Version grid box. You cannot change the information. The system also displays the most recent status for the version or amendment. So, if a file was initially imported in a *Draft* status, but subsequently was executed, then the Status field value is *Executed.*

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When you click the Done with Import button, the system performs the same validations and processing as it does for previous versions when you import a document during document creations. If all the previous versions already exist and there are no files to upload, then the Done with Import button is not available for use.

Prior Versions Optional

This grid box displays information about the previous version that you are going to upload and then import.

Type Displays the type of imported document the system will create for the previous version. The system uses the CS_DOC_HDR.CS_TWOFILE_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.

Status Date 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.

Changing the Source Transaction For an Imported Ad Hoc Document

Access the Change Source Transaction page (Supplier Contracts, Create Contracts and Documents, Document Management, and click the Change to New Source button on the Document Management page).

This feature allows you to import a preliminary document such as supplier paper as an initial ad-hoc document, and later when finalized, relate the document to the related Purchasing Contract or Purchase Order.

After importing an ad hoc document, you can change it to either a purchase order, or purchasing contract 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.

Source Transaction Select a new source transaction type. Values include *Purchase Orders* and *Purchasing Contracts.*

Document Type 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.

Business Unitand **Purchase Order** These fields become available when you select the *Purchase Order* value in the Source Transaction field.

Set IDand **Contract ID Order** These fields become available when you select the *Purchasing Contracts* value in the Source Transaction field.

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Chapter 12

Generating Microsoft Word Documents

This chapter provides an overview of Microsoft Word document generation and discusses how to:

- Generate Microsoft Word documents.
- Refresh Microsoft Word documents.
- View document generation logs.

Understanding Microsoft Word Document Generation

PeopleSoft Supplier Contract Management generates Microsoft Word 2003 documents in a Microsoft Word 2003 .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. This chapter focuses primarily on draft document generation and re-create and refresh capabilities of document generation.

Note. Make sure you are using the latest service pack of Microsoft Office Word 2003, at least SP1, and that the application is a part of Microsoft Office Professional Edition 2003. The Standard version of Microsoft Word 2003 is not sufficient for editing and maintaining PeopleSoft custom XML tags. You can also use Microsoft Office Word 2007 as long as documents are saved in 2003 .xml compatibility mode. Unlike Microsoft Word 2003, the Standard version of Microsoft Word 2007 is sufficient for editing and maintaining PeopleSoft custom XML tags.

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 Internet Architecture 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, starting the generation process. You can also use a selection wizard to determine the configurator.

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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 Microsoft Word document in a Microsoft Word 2003 .xml file 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 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.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Installation Options for PeopleSoft Supplier Contract Management, page 227.

This flowchart shows a high-level view of how the system generates Microsoft Word documents:

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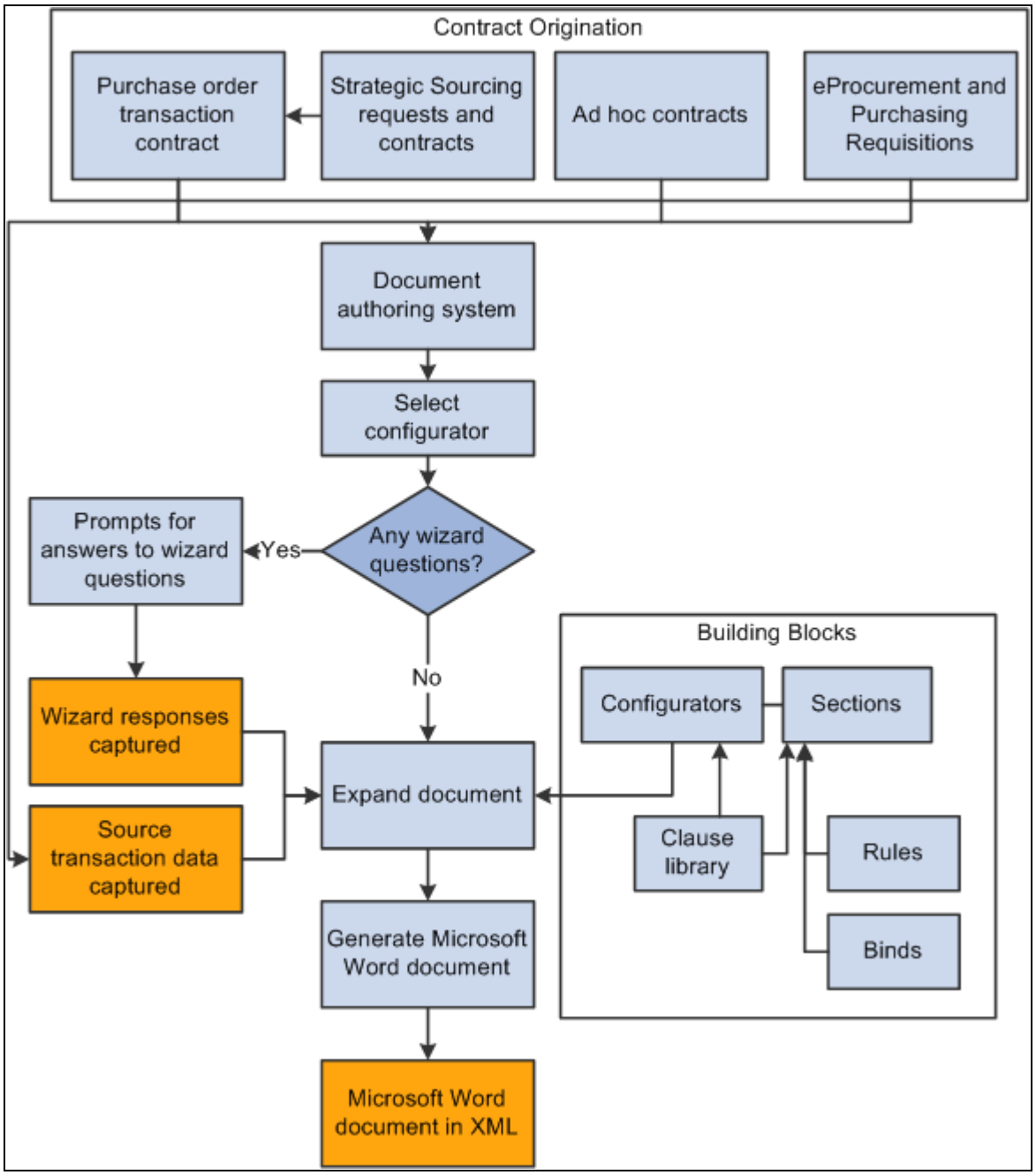

Microsoft Word document generation

The next sections provide a more detailed explanation of Microsoft Word document generation.

See Also

Appendix A, "Microsoft Word Integration with Supplier Contract Management," page 701

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Processing Terms Used in This Chapter

This section describes processing features the system uses during document generation.

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 WordML (Microsoft Office 2003 WordProcessing Markup Language) Microsoft Word 2003 uses this XML file format, enabling the PeopleSoft Supplier Contract Management system to generate the Microsoft Word content and complete the check-out and check-in processes without losing Microsoft Word formatting.

When a Microsoft Word document is in Microsoft WordML format, the system creates or saves the file with an .xml extension instead of a .doc extension.

Note. While Microsoft Word 2003 and Microsoft Word 2007 enable you to open an .xml format file and save it as a .doc format file, when you use it with PeopleSoft Supplier Contract Management, the format must always be a Microsoft Word 2003 .xml file format.

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 vendor 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.

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Source transaction Indicates whether the document was created for use with a purchasing contract, purchase order, or for ad hoc use. An *Ad Hoc* 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.

A *Purchasing Contract* 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.

A *Purchase Order* document is a document that is based on a purchase order and is linked to a PeopleSoft Purchasing purchase order.

See Also

Chapter 2, "Understanding PeopleSoft Supplier Contract Management," Source Transactions for Authoring Purposes, page 13

Generating Microsoft Word Documents

This section 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 Chapter 9, "Managing the Contract Library," Understanding Document Types, page 305.

   Use the following links for more information about invoking the document generation process for ad hoc, purchase order, and purchasing contract documents.

   See Chapter 13, "Managing Document Life Cycles," Adding Authored Documents, page 482.

   See Chapter 3, "Defining Supplier Contracts," Adding Purchasing Contract Documents, page 45.

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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.

   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.

   See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Mapping Bind Variables, page 247.

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.

   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.

   See Chapter 13, "Managing Document Life Cycles," Copying Documents Using Document Management, page 493.

   See Chapter 13, "Managing Document Life Cycles," Importing Contract Documents, page 496.

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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.

      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.

      See Chapter 9, "Managing the Contract Library," Defining Basic Configurator Information, page 339.

      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.

      ---

   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.

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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 Chapter 9, "Managing the Contract Library," Understanding Bind Variables, page 289.

See Chapter 9, "Managing the Contract Library," Bind Variables and Repeating Clauses, page 279.

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.

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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.

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5. The system creates an XML-based document using Microsoft WordML schema.

   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 00000000000000000000000023, 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.

   See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up Supplier Contract Attachment Database and FTP Servers and Directories, page 197.

   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.

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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.

   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.

   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.

   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.

   See Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," Understanding Amendments for Imported Documents, page 690.

   See Chapter 11, "Importing Clauses, Sections, and Documents," Importing Contract and Ad Hoc Documents, page 425.

Refreshing Microsoft Word Documents

This section 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.

  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 in This Chapter section, 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

  ---

  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.

  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.

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- 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.

Note. The Refresh feature can also apply to amendments when you are maintaining separate amendment files for the contract.

Viewing Document Generation Logs

This section provides an overview of log generation and discusses how to 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.

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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 Chapter 9, "Managing the Contract Library," Defining Basic Configurator Information, page 339.

Logging Errors and Messages

This table describes detail messages and warnings that are associated with document generation logging:

Messages	***Cause and Resolution***
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.

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Messages	*Cause and Resolution*
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.	The system found a bind variable (wizard or transactional) in the generated document, but could not resolve the variable. This might happen if a wizard bind exists in a clause or section, but was not answered as part of the wizard.
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.
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:

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Messages	Cause and Resolution
Alternate considered.	*Alternate Used:* The system evaluated the alternate clause that was listed in the Content ID column and used it instead of the primary clause. *Alternate Not Used:* The system evaluated the alternate clause that was listed in the Content ID column and did not use it to replace the primary clause. For example, the alternate rule did not resolve to true.
Include.	*Inserted by Clause:* The content ID was included in the document because it was listed as a dependent to the clause object that was listed in the Source Content ID column. *Inserted by Section:* The content ID was included in the document because it was listed as a child to the section object that was identified in the Source Content ID column. *Inserted by Rule:* The content ID was included in the document because it was tied to a rule that was identified in the Source Content ID column that was evaluated to true. Blank: If the message column is blank, the content ID was included in the document because it was listed directly on the document configurator.
Include repeating.	*Inserted by Clause*: 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 Source Content ID column. *Inserted by Section:* 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 Source Content ID column. *Inserted by Rule:* The repeating content ID was included in the document because it was tied to a rule that was identified in the Source Content ID column that was evaluated to true. 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.

Page Used to View Document Generation Logs

Page Name	Definition Name	Navigation	Usage
Generation Log	CS_DOC_WGEN_LOG	Supplier Contracts, Create Contracts and Documents, Document Management Click the Generation Log link on the Document Management page.	View generation logs.

Viewing Generation Logs

Access the Generation Log page (Supplier Contracts, Create Contracts and Documents, Document Management, and click the Generation Log link on the Document Management page).

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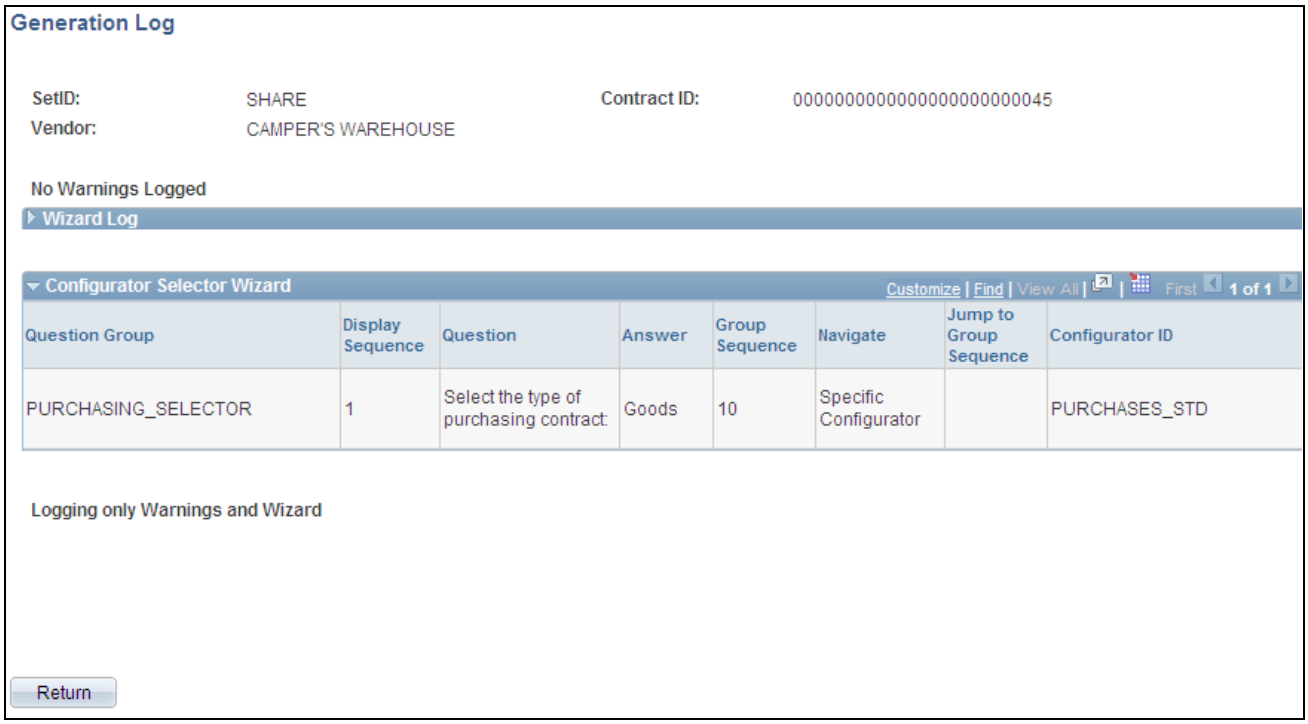

Generation Log page

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:

No Warnings Logged This message indicates that no warnings were logged during the generation of the document.

Logging Warnings and Wizard Only 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 Bind Variables and Configurator Expansion grids are not available.

Generation Warnings

This grid describes warnings that the system generates when it processes a document.

Message Displays the subject of the warning.

See Chapter 12, "Generating Microsoft Word Documents," Understanding Log Generation, page 453.

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Content Type Displays the type of document content from which the system generated the warning. Examples of content types are rules, clauses, and sections.

Content ID Displays the content's object name. This is the name that was assigned to the content during its creation.

Source Content Type Displays the parent content type (section, rule, clause) for the source content ID.

Source Content ID Displays the parent content object ID in which the specified content ID is a child or is dependent.

Bind Type Displays the type of bind for which the system logged the message. Values are *Transactional,* which retrieves data values from source transactions, and *Wizard.*

Bind Variable 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.

File Type 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. *Main* indicates that the log is for the core document and *Attachment* 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.

Question Group Displays the question group for the document creation wizard to which the listed question belongs.

Display Sequence Displays the display order in which the question appears to the author.

Question Displays the question as it appeared to the author.

Answer Displays the answer that the author provided for the question.

Bind Variable Displays the bind variable that is associated with the question.

Group Sequence 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.

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Navigate	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: *Next Group:* Indicates that the system went to the next question group after the question was answered by the author. *Next Question:* Indicates that the system went to the next question in the question sequence after the question was answered by the author. *Specific Sequence Number:* 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.
Jump to Group Sequence	Displays the sequence number that the system accessed after this question was answered. It is based on the navigation option of *Specific Sequence Number*.

See Chapter 10, "Using the Contract Document Wizard," Setting Up Question Groups for the Contract Wizard, page 376.

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 Chapter 13, "Managing Document Life Cycles," Copying Documents Using Document Management, page 493.

See Chapter 3, "Defining Supplier Contracts," Copying Existing Purchasing Contract Documents, page 52.

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 Chapter 10, "Using the Contract Document Wizard," Understanding the Contract Wizard, page 365.

Bind Variables: Log Tab

Use the Log tab grid to view information on the resolution of bind variables.

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Occurrence 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.

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*.

Bind Type Displays whether the bind is a wizard or transactional bind. *Wizard* type binds are those that are used with the document creation wizard. *Transactional* 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.

Bind Variable Displays the bind variable identifier.

Variable Value Indicates the value that the system inserted in the document to replace the bind variable.

Bind Change Type Displays the type of change that the system made to a bind when the bind was refreshed.

File Type 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.

Display Sequence Displays the display order in which the bind appeared to the author. This number is the same as the number shown in the Wizard Log grid and can be used to link the two together.

Question Group 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.

Action Displays the action that was taken by the system when it generated the document.

See Chapter 12, "Generating Microsoft Word Documents," Understanding Log Generation, page 453.

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Generate Position 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.

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.

Content Type Indicates whether the corresponding type for the content ID is *Clause,Section,* or *Rule.*

Content ID Displays the name of the clause, section, rule that appears in the Content Type field.

Message Displays more information that is associated with the action.

See Chapter 12, "Generating Microsoft Word Documents," Understanding Log Generation, page 453.

Source Content ID Displays the parent content ID that resulted in the action. This is applicable only for certain actions and messages.

File Type Displays the file type that this row belongs too. Document types include *Main* and *Amendment.*

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Chapter 13

Managing Document Life Cycles

This chapter provides overviews of document life cycles and life-cycle statuses and actions and discusses how to:

- Add authored documents.
- Find authored documents.
- Maintain purchasing, purchase order, and ad hoc documents.
- Refresh and re-create documents.
- Maintain document details.
- Create executive summaries.
- View and edit documents.
- View document version history.
- Set up default document preferences.
- Collaborate on documents.
- View document modification summaries.
- View and upload attachments and related documents.
- Send documents to internal and external contacts.
- Grant document view access.
- Dispatch documents.
- Approve documents.
- Sign documents with digital signatures.
- Execute documents.
- Define contract amendments.
- Compare documents.
- Use document-related pagelets.
- Deactivate and reactivate documents.

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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 to internal and external collaboration, approval, digital signature, execution, amendment processing, and 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.

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 statuses, an Approved status with optional workflow, and 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 or purchase order, the document life-cycle status is independent of the purchasing contract or purchase order status. This is intentional to account for timing differences between transactional contract execution and document execution. For example, a transactional purchasing contract might be approved for the original contract document execution, yet the current document status could be Draft due to the initiation of a recent amendment.

Unlike the transactional purchasing contract and purchase order 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 transactional 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 transactional purchasing contract. The ad hoc document content can reference values from the document management page and wizard bind values.

Also, 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.

Ad hoc and purchasing contract documents are similar in that you define their content and structure through a document configurator (sections and clauses), wizards, and wizard bind values.

You use three basic methods to create new documents in the document authoring system. They include:

- 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.

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- Copy a new document from an existing document.

  This method creates a contract document by copying it from an existing contract document. Any bind variables are refreshed to reflect the values in the new contract. This method is available for both ad hoc and purchasing contracts.

- 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 marks it as an imported document.

Depending on the types of documents you are adding to the system, you might have one or more of these methods available for your use.

This flowchart shows several of the actions, version examples, and statuses through which a document passes as it progresses through its life cycle:

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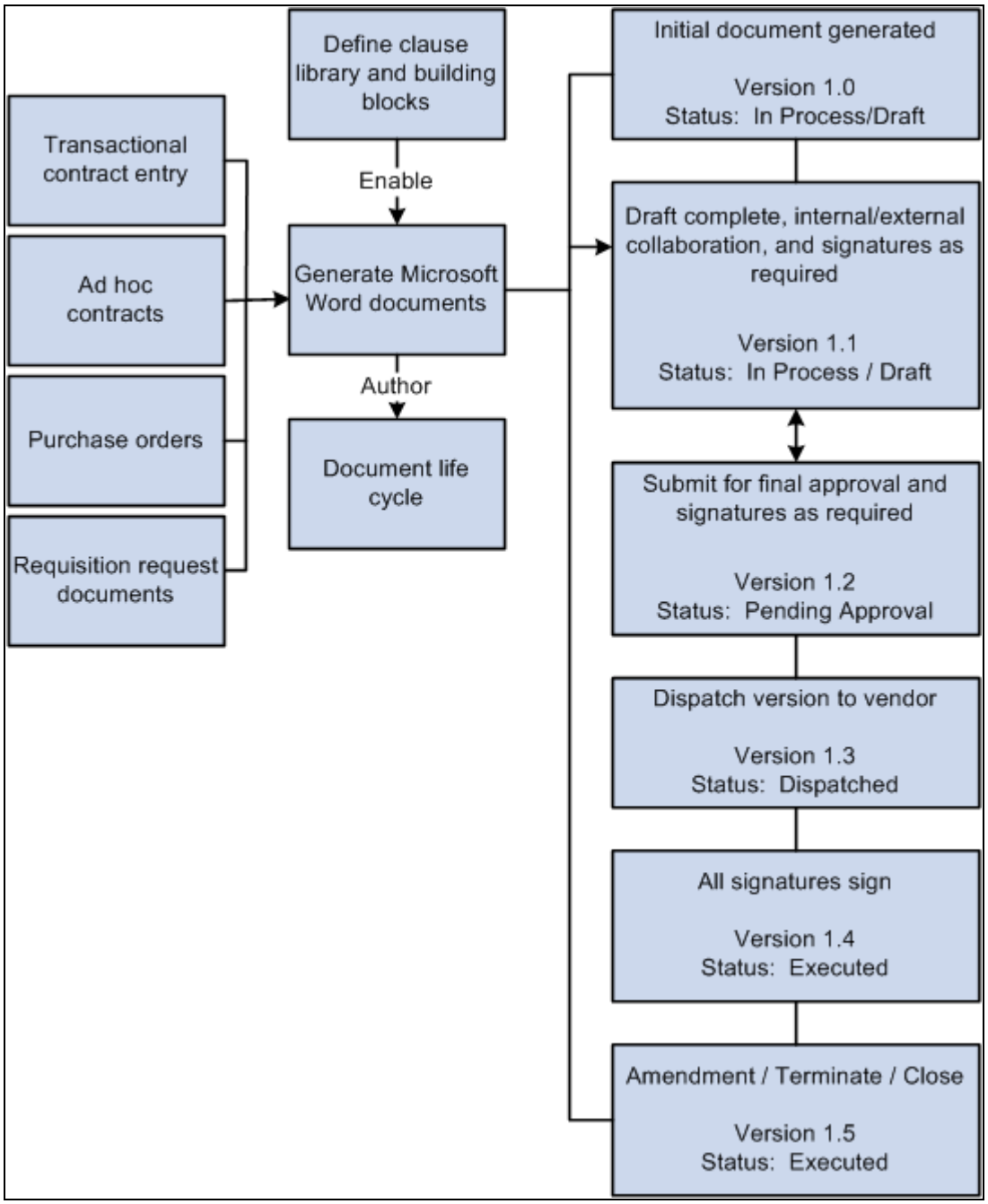

Document life-cycle flow

The next sections provide more details about a document's life cycle.

Understanding Life-Cycle Statuses and Actions

During a document's life cycle, you can take numerous actions that can change a document's status. The system tracks these actions and statuses. You can review the actions using the Document Version History link.

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This section 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 detailed accounts of changes that are made to the document. The actions that are performed on a document also determine what buttons are available on the Document Management page. Typically, you initiate an action by clicking an available button. The system makes the appropriate actions available depending on the current status of the document. The system tracks actions against documents using the Document Version History feature.

The next table describes life-cycle actions and the results of those actions in the order that you would typically perform them. The actions apply for initial documents 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 Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," Understanding Contract Document Amendments, page 679.

Life-cycle actions and results include:

Action Buttons and Links	***Description and Results***
Accept Supplier's Revisions and Finalize	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 supply-side users complete their collaboration. The system must be configured to enable external online collaboration with suppliers. The feature is only available if you have a supply-side portal configured for external users to access the system and the document has an external contact and user defined as the primary owner of the document.
Add Attachments/Related Documents	Click to add 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. Attachments that have been added through the Contract page for source transactions of 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.
Approve	Click this button to approve the document during formal document approvals.
Approval Details	Click this link to view a graphical workflow of a document.
Attach to Requisition	Click this button to attach a document, along with any comments that 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 one time. This button is visible only if the ad hoc document is tied to a requisition ID. The document must be assigned a document type that is set up for use with PO requisitions.

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Action Buttons and Links	*Description and Results*
Bypass Approvals	Click this button to automatically set the document status to Approved, bypassing 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.
Cancel Approval Process	Click to end the approval process. When contract administrators stop the document approval process, the system will set the document status to Draft.
Cancel Collaboration	Click this button to stop collaboration on a document. This action is performed by the document owner. 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 will need to finalize the collaboration before proceeding, so the status is set to Collaborated, Pending Review. If you are canceling an external collaboration cycle and the external user has not started to make any 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 to cancel the collaboration.
Cancel Check Out	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.
Cancel Signature Process	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 may have already been entered on the document. After canceling the signature process, you can change the document and prepare it again for signatures after the changes are complete.
Cancel Signing	Click to cancel the check out of a document that is being signed. The button only appears for the user who has the document locked for signing and the document administrator.
Change to New Source	Click to change the source transaction type for an imported ad hoc document. This button only appears for imported ad hoc documents on the Document Management page and enables you to access the Change Source Transaction page. You can change the source from an ad hoc to purchase order or purchasing contract document. The change is permanent and after you make the change, the button is no longer available.
Check In	Click this button to check in a document. The system provides you prompts to select the checked out file, upload it, and define version updates. When you are checking in an amended contract that is in an amendment cycle, and the amendment option is Amend Contract with Amendment Files, the system provides a prompt that ask you if you want to automatically update the amendment file with the changes made to the amended contract.

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Action Buttons and Links	*Description and Results*
Compare Document	Click this button to compare differences between the current version of the document and a re-created or refreshed version of the current document. This button is available only if you have set up the system for document comparisons. Use installation options to define comparison and rendering settings. See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Document Comparisons and Rendering, page 224. See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Document Comparison and Rendering Setup, page 224.
Compare Selected Word Documents	Click this button to compare two documents that you select on the Document History page.
Compare Revised Documents	Click this button to compare a suppliers' 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.
Complete Document	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. When you complete the document, the document is through with modifications and further collaboration is not necessary.
Copy Document	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 then runs a refresh on it to update bind values and content based on the target contract's bind values.
Create Amendment	Document owners use this action to create a formal amendment to the current executed document. The system sets the document status to Draft and 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 for the documents. Most actions in this table that apply to the original 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 Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," page 679.
Create Document	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. See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up User Preferences, page 266. See Chapter 12, "Generating Microsoft Word Documents," page 441.

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Action Buttons and Links	*Description and Results*
Deactivate Document	Document administrators use this action when they determine that the document should not be available for use. The system updates the document status to Inactive. You can use this status to close out contracts. The system displays this message after a document has been deactivated: This Document Has Been Deactivated. The system retains the current document status at the time the document is deactivated.
Decline Signing Document	Click this button to decline digitally signing the document and enter comments about the document. This could be due to a variety of reasons, such as a signature field is not in the PDF or the document needs revising. The system updates the Document Management page to indicate that the document has been declined. **Note.** 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 your configuration, you might be capturing signatures before, during, or after the approval process when using approvals.
Dispatch	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.
Document Details	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 Document Details page also provides information about document cycle times and document creation and processing activities.
Document Modification Summary	Click this link to view changes, such as new, changed, or deleted clauses, that have been made to a document.
Document Version History	Click this link to access the Document History page where you can view the history and version details for a document.
Document View Access	Click this link to provide viewing permissions for users and to review collaborators who have view permissions. You can assign view access based on the user's role.
Edit Amended Document	Click this button to edit an amended document. The button is only available when you create an amendment using the amendment option is 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 Edit Amendment File button. When you check out the amended document, the system updates the Document Management page to indicate that the document is checked out, and provides Check In and Cancel Check Out buttons for the document.
Edit Amendment File	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 Document Management page to indicate that the file is checked out, and provides Check In and Cancel Check Out buttons for the file.

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Action Buttons and Links	*Description and Results*
Edit Document	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 authority. During the amendment cycle, this button launches one or two files depending on how you are maintaining amendments for the document.
Execute Contract	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 the button.
External Contacts/Signers	Click this link to add and update external contacts for a document. The system uses values that are defined on the External Contacts page as default values when you send or dispatch documents. In addition, attributes necessary for supplier portal access to documents is also defined here for external users.
Finalize Collaboration	Click to complete collaboration after all collaborators have responded to the 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. For external collaboration, when you click the Finalize Collaboration 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 and manually make any changes and then check in that document before finalizing it. This might be necessary if the 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 is not .xml. If you want to use the supplier's version and make it the current version, use the Accept Supplier's Revisions and Finalizebutton. The system updates the document status to Collaborated when collaboration is finalized.
Generation Log	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.
Import Document	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 Chapter 11, "Importing Clauses, Sections, and Documents," Importing Contract and Ad Hoc Documents, page 425.
Import Prior Document	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.
Internal Contacts/Signers	Click this link to view or maintain the internal collaborators and signers defined for the document.

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Action Buttons and Links	*Description and Results*
Create/Maintain Executive Summary	Click to access the Executive Summary page. Using the page you can view, update, refresh, and re-create the executive summary document.
Mark as Reviewed	Collaborators use this action when they are finished reviewing and potentially changing the document or adding collaboration comments. When the final collaborator marks a document as reviewed, the system sends a notification to the document administrator.
Modify Attachments/Related Documents	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.
Modify Collaboration	Click this button to update the list of collaborators when a document is currently pending collaboration. The system invokes a separate page that enables you to view the status of current collaborators and place new users in the list. Next, you can route the document for collaboration, which sends notifications to those new users that were added to the collaboration process.
Notify Me	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 inserts a date and time stamp when you enter an email address for the person to be notified. The system provides a Notify When Available Template field on the Installation Options page in which you can select a notification template for use with this button. 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.

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Action Buttons and Links	*Description and Results*
Prepare Document for Signing	Click this button to access the Prepare Document for Signatures page where you can verify that the list of signers is accurate and list 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. This action converts (creates a copy) the document to the appropriate signature method defined on the Installation Options page. The available methods are Adobe Acrobat PDF or Microsoft Word DOCX methods. After preparing the document for signature, 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. 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. **Note.** The list of signers in the internal contact and external contact list act independently of actual signature fields defined within the document at the time of document preparation. 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.
Preview Approval	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. You use installation options to indicate whether approval is required for documents. If the system doesn't require approvals, it does not display this button. See Chapter 17, "Approving Documents and Document Components," Previewing Approvals, page 668.
Reactivate Document	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.
Recreate Document	Click this button to completely re-create the document and rerun any associated wizard to view and update wizard values. During re-creation, the system removes document contents and does not save any manual edits that have been made to the current document in the re-created document. If you specify a new version when re-creating the document, you can view previously generated and edited versions of the document using the Document Version History 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. See Chapter 12, "Generating Microsoft Word Documents," Generating Microsoft Word Documents, page 445.

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Action Buttons and Links	*Description and Results*
Refresh Document	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 any 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 a purchasing contract. The system also evaluates rules that use bind variables and might change the document content based on the evaluation. When a bind variable is not used in a rule and is not of a repeating nature, such as a contract amount or wizard value, the system replaces the value within the clause. Any editing that has been performed within the related clause is not lost. However, when a bind variable is used in a rule or is of a repeating nature and changes are made, such as changes to a contract line, the system re-creates the entire repeating or rule section and replaces it in the authored document, including any clause text 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 Chapter 12, "Generating Microsoft Word Documents," Refreshing Microsoft Word Documents, page 451.
Redispatch	Click this button to dispatch the 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 need to reroute for signatures.
Reset to Dispatch	Click this button to reset the document status 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.
Route Externally	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, contract specialist and administrator can cancel the external collaboration cycle if needed. **Note.** Routing external feature is only available if you have a supply-side portal configured for external users to access the system and 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 vendor definition contact information for a contract collaborator type contact.

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Action Buttons and Links	*Description and Results*
Route for Internal Signatures	This button is available for document administrators when the system is configured to allow routing for signatures before or after approvals. Click the button to send the document to internal signers for their digital/electronic signatures. The system routes the document in sequential order to each person listed as a signer on the Internal Collaborator/Signers page, and who has not yet 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. 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. You use the Life Cycles Options section on the Document Type page to select routing options. When you select to enable internal signatures in the Life Cycles Option section, the system activates three additional check boxes. If you select the Prior Approvals or After Approvals check box, this button appears. If you select During Approvals this button does not appear on the Document Management page. **Note.** After a document is prepared for routing, external signatures can be accomplished before or after internal approvals using the Send to Contacts or the Dispatch buttons. See Chapter 9, "Managing the Contract Library," Setting Up Document Types, page 354.
Route Internally	Click this button to set up collaboration and to send notifications to internal contact users who need to review and provide feedback for the 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 exclude or include additional users before clicking the Route for Collaboration button. The system sends notifications to all users simultaneously. 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 documents. You can apply this action to the original document as well as any amendments. **Note.** Collaboration is not intended for use with external users. Use the Send to Contacts or Route Externally buttons to send and collect feedback from suppliers.

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Action Buttons and Links	*Description and Results*
Send to Contacts (send document to contacts)	Click this button to send the document to contacts. Document owners perform this action when they want to send the 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 using the Supplier Portal. The document format can be an .xml, .doc, or .pdf file type depending on how the rendering options are set on the Installation Options page for PeopleSoft Supplier Contract Management. When sending documents to contacts, such as vendors, owners can mark the document as checked out, using the Set to Checked Out check box, to prevent internal changes to the document while it is at the supplier's location. When the document is marked as checked out, the Document Management page displays the message: File locked for external review. When a document is prepared for digital signatures, the Send to Contacts button enables you to send the signature-ready PDF file using email, or to 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 Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Signing External Documents, page 144.
Sign Document	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 yet signed the document. This action launches and locks the document and 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 will also see the Sign button on the Document Management page when the approval step is awaiting the user. **Note.** Signing and approving or denying within a workflow are separate actions.
Sign Document (On Behalf)	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 sign the document.
Stop Internal Signatures	Contract administrators click 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.

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Action Buttons and Links	*Description and Results*
Submit for Approval	Click this button to start the approval process. When the system requires document approvals, this action submits the document for workflow approval. Administrators take the action after collaborating final internal contract approval. Administrators can add any additional approvers or reviewers for the document. Submitting a document for approval applies to the initial version of the document and amendment processing. If the system is configured to capture internal signatures during approval and there are internal signers listed for the document, then the Sign Document 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. 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. See Chapter 17, "Approving Documents and Document Components," page 649.
Upload a Document Attachment File	Click to upload a document attachment for the main document. The attachments can represent supplier papers, internal executive summaries, or other documents that are related to the contract. Attachments that have been added through the Contract page for source transactions of purchasing contract also appear on the Attachments page.
Upload another Document Attachment File	Click to upload a document attachment for the main document.
Upload Prepared Document	Click this button to upload the prepared for signature document. The 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 the 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. 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. **Note.** For Adobe Acrobat, if the administrator uploads a prepared document which has not had usage rights enabled, then users having just the Adobe Reader are not permitted to add a signature.
Upload Signed Document	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 Route for Internal Signatures button, the system routes the document to the next signer in the list.
View	Click to view a delete 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. Attachments that have been added through the Contract page for source transactions of purchasing contract also appear 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.
View Amended Document	Click this button to view an amended document.

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Action Buttons and Links	*Description and Results*
View Amendment File	Click this button to view an amendment file. This is a file with the summary of changes in the document.
View Document	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.
View Executive Summary	Select to view the executive summary for the contract document. The executive summary is available for all internal users who have view access to the document. The View Executive Summary button is available after the summary has been created. The button is also available during document approval.
View Original Document	This button appears only when the current document is an amendment, and the amendment option is Amendment Files Only. Click the button to view but not check out the originally executed document. The View Document button appears in addition to this button so that you can view the current amendment.
View Revised Document	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 Document Management page after the supplier has completed the review.
Where Used as Related Document	Click this link 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. You use the Modify Attachments/Related Documents link or the Add Attachments/Related Documents link to add or update related documents. The Where Used as Related Document 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:

Status	*Description*
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 the supplier user. It has been returned to the document owner or contract specialist for reconciliation.
In External Collaboration	The document has been sent to the supplier user (external user) who is designated as the primary document owner on the supplier side.
Collaborated, Pending Review	The document has been reviewed by all internal collaborators and is awaiting a final review by the document administrator or owner.

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Status	Description
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.

See Also

Chapter 13, "Managing Document Life Cycles," Collaborating on Documents, page 542

Document Approval Statuses

Approval statuses are controlled by the Approval Workflow Framework when document approvals are required in Supplier Contract Installation options. 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:

Status	Description
Pending Approval	The document has been submitted for approval and is awaiting the approval of one or more users. In addition, the system sets a workflow status for approvers to Pending for each required document approver. You can submit a document for approval while it's in a Draft or Collaborated status.
Approved	The document has been through all approvers and has been approved by all approvers. You can dispatch and execute the document at this point.
Draft	When any step is denied during approval workflow, 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 Complete button.

See Also

Chapter 17, "Approving Documents and Document Components," page 649

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Common Elements Used in This Chapter

Administrator 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.

If you are creating a purchasing contract document, the system populates this field with the administrator from the purchasing contract.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up User Preferences, page 266.

Approved On 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.

Configurator ID 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 Availability Status field must be *Available* for the configurator to appear in lists of values.

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.

Configurator Selector 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.

The configurator selector wizard automatically runs between the Add Document and Create Document pages, if necessary, based on the document type. The Configurator Selector button also appears on the Create Document page to enable you to run the configurator selector wizard again as needed.

Collaborated On 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.

Contact 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.

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Copy Document 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.

Created On 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.

Department 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.

Dispatched On 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.

Document SetID The setID to which all elements in a document, such as clauses, sections, and wizards, belong.

Document Type 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 Use Document Type 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.

Document View Access Click this link to view and update those users who have view access for the document by role name.

Executed On 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.

External Contacts List 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.

Import Document 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.

Imported Document 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.

Last Modified On 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.

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Save 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.

Source Transaction Indicates whether the document was created for use with a purchasing contract or for ad hoc use. An *Ad Hoc* 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.

A *Purchasing Contract* 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.

A *Purchase Order* document is linked to a Purchasing purchase order.

When you create a document using the ad hoc source, you manually enter a document name. Using a purchasing contract or purchase order, you select the contract or purchase order to which you want to associate the document.

Sponsor Select a sponsor for this document. A sponsor should represent a user from the department that is sponsoring the contract.

Vendor ID Displays the vendor that is the supplier for the contract. The system populates and displays this field when you create a document based on a contract ID.

Adding Authored Documents

This section provides an overview of how to add authored documents, lists common elements, and discusses how to:

- Create ad hoc documents and ad hoc contracts from purchase orders using Document Management.
- Create ad hoc documents for requisitions using Document Management.
- Copy documents using Document Management.
- Import ad hoc or purchase order contract documents.
- Create and copy documents using Contract Entry.

Understanding How to Add Authored Documents

You can add authored documents for use with purchasing contracts, as stand-alone ad hoc documents or as ad hoc documents that are linked to purchase requisitions. The series of pages that you use to add documents is similar for all methods, but some differences exist depending on values you select to add the document.

See Chapter 3, "Defining Supplier Contracts," Adding Purchasing Contract Documents, page 45.

To add documents into the document management system, you can use these methods:

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- Create standard ad hoc contracts or purchase order contracts from a document configurator ID from within the Document Management component.

  See Chapter 13, "Managing Document Life Cycles," Creating Ad Hoc Documents and Ad Hoc Contracts from Purchasing Contracts and Purchase Orders Using Document Management, page 485.

- Create documents for use with PeopleSoft eProcurement and Purchasing requisitions.

  See Chapter 3, "Defining Supplier Contracts," Adding Requisition Documents and Wizard Responses, page 53.

- Create ad hoc or purchase order contracts by copying documents using the Document Management component.

  See Chapter 13, "Managing Document Life Cycles," Copying Documents Using Document Management, page 493.

- Create ad hoc or purchase order contracts using document import.

  See Chapter 11, "Importing Clauses, Sections, and Documents," Importing Contract and Ad Hoc Documents, page 425.

- Create purchase order contracts using the Contract Entry component.

  See Chapter 3, "Defining Supplier Contracts," Creating Purchasing Contract Documents, page 51.

- Create purchase order contract documents by copying documents using the Contract Entry component.

  See Chapter 3, "Defining Supplier Contracts," Copying Existing Purchasing Contract Documents, page 52.

Understanding Document Copies

Using the Copy Document feature, you can create ad hoc, purchase order documents and purchasing contract documents by copying them from existing documents. This saves time when a new contract contains essentially the same edits that may have been done on a prior contract. The Copy Document page provides document attributes on which you can search for existing documents that meet criteria you enter. When using document types, the search is limited to documents with the same type as you specify for the document that you are creating. The system does not use a document configurator to build documents that you create using the copy document method, but rather it copies the document from the existing contract document and refreshes any content of the document based on the target document's transaction information included in bind variables for the document.

When using multi-source configurators, the system enables the copying of documents from different source transactions as long as the to and from documents use the same multi-source configurator within the document type.

Note. You can specify rules within a multi-source configurator to include or exclude content from the 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.

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 ad hoc purchase order document, or purchasing contract document from which you can create a new document. Using the button, you access the Copy Document page, where you can perform a 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 continue 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.

See Chapter 3, "Defining Supplier Contracts," Copying Existing Purchasing Contract Documents, page 52.

See Chapter 13, "Managing Document Life Cycles," Copying Documents Using Document Management, page 493.

Pages Used to Add Authored Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Add a Document	CS_DOC_ADD	Supplier Contracts, Create Contracts and Documents, Document Management	Create ad hoc documents and ad hoc contracts from purchase orders using Document Management.
Create Document	CS_DOC_CREATE	Click the Add a Document button on the Add a Document page.	Create ad hoc documents for requisitions.
Document Management	CS_DOC_MAINT	Supplier Contracts, Create Contracts and Documents, Document Management. Enter document attributes on the Add a Document page, and click the Create Document button.	Define basic information about purchasing contracts or ad hoc documents. When you click the Create Document button, the system generates the document and the Document Management page appears with the actions that you can take to manage a document through its life cycle.
Copy Document	CS_DOC_COPY_SEC	Supplier Contracts, Create Contracts and Documents, Document Management Click the Copy Document button on the Add a Document page. Select the document from which you to copy the new document.	Copy ad hoc or purchase order contracts using Document Management.

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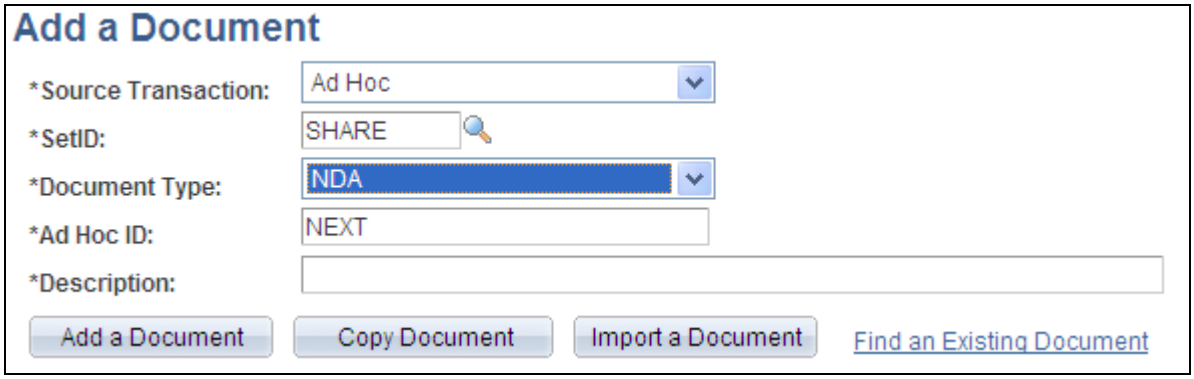
Page Name	Definition Name	Navigation	Usage
Import Document	CS_DOC_IMPORT	Supplier Contracts, Create Contracts and Documents, Document Management Click the Import a Document button on the Add a Document page.	Importing ad hoc or purchase order contract documents.

Creating Ad Hoc Documents and Ad Hoc Contracts from Purchasing Contracts and Purchase Orders Using Document Management

Access the Add a Document page (Supplier Contracts, Create Contracts and Documents, Document Management).



Add a Document page

Use this page to select a source transaction *(Ad HocPurchase Order*, or *Purchasing Contracts)* and 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, or the Ad Hoc ID field appears. The Description field is required, and if you are creating a purchasing contract document, the system enters the description from the purchasing contract. If you are creating a purchase order document, the system uses the purchase order description as the default value for purchase order ID.

Contract ID Select the purchasing contract for which you want to create a document. This field is only available when you select to create a purchasing contract document.

PO ID(purchase order ID) Select the purchase order for which you want to create a document. This field is only available when you select to create a purchase order document.

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Ad Hoc ID

Enter a name for the ad hoc document. This field is only available for ad hoc source transactions. If you are using automatic numbering for the ad hoc ID, the system places *NEXT* in the Ad Hoc ID field. Then, when you click the Add a Document button, the system assigns the document ID beginning with the start sequence that is defined for the given document type. If a start sequence is not defined at the document type level, then the system uses the default start sequence defined in the auto numbering setup. The rest of the ID depends on the length of the field and the last number assigned to a document.

Note. You can override the *NEXT* value in the Ad Hoc field; however, if users can override the value, the naming schema can be disrupted.

Document Type

Select a document type for use with this document. When creating a document the valid list of document types for a user is controlled by the roles associated with the document type definition. If installation options have been set to use the document type, the Document Type field is required. If the Use Document Type installation option has not been selected, the Document Type field does not appear on this page.

Add a Document

Click to create the document based on a document configurator ID.

Copy Document

Click to create the document as a copy of another document in the system. You can copy a document that is based on a different source transaction if the document type has been set up to allow copying a document from a different source transaction. The system determines the document combinations that can be copied by using the document configurator Applicable Sources grid settings. These settings define the other source transactions documents that can be copied for documents that use the configurator.

See Chapter 13, "Managing Document Life Cycles," Copying Documents Using Document Management, page 493.

Import a Document

Click to import a legacy document or a contract.

Note. Depending on user preference settings, this button may not be visible for all users.

See Chapter 11, "Importing Clauses, Sections, and Documents," Importing Contract and Ad Hoc Documents, page 425.

Find an Existing Document

Click to access the Find an Existing Document page to search for existing documents.

See Chapter 13, "Managing Document Life Cycles," Finding Authored Documents, page 496.

Note. 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 will launch the wizard after you click the Add a Document button. These questions guide you in selecting a configurator to use with the new document. When the wizard is complete, the system automatically assigns the configurator ID.

See Chapter 10, "Using the Contract Document Wizard," Understanding the Contract Wizard, page 365.

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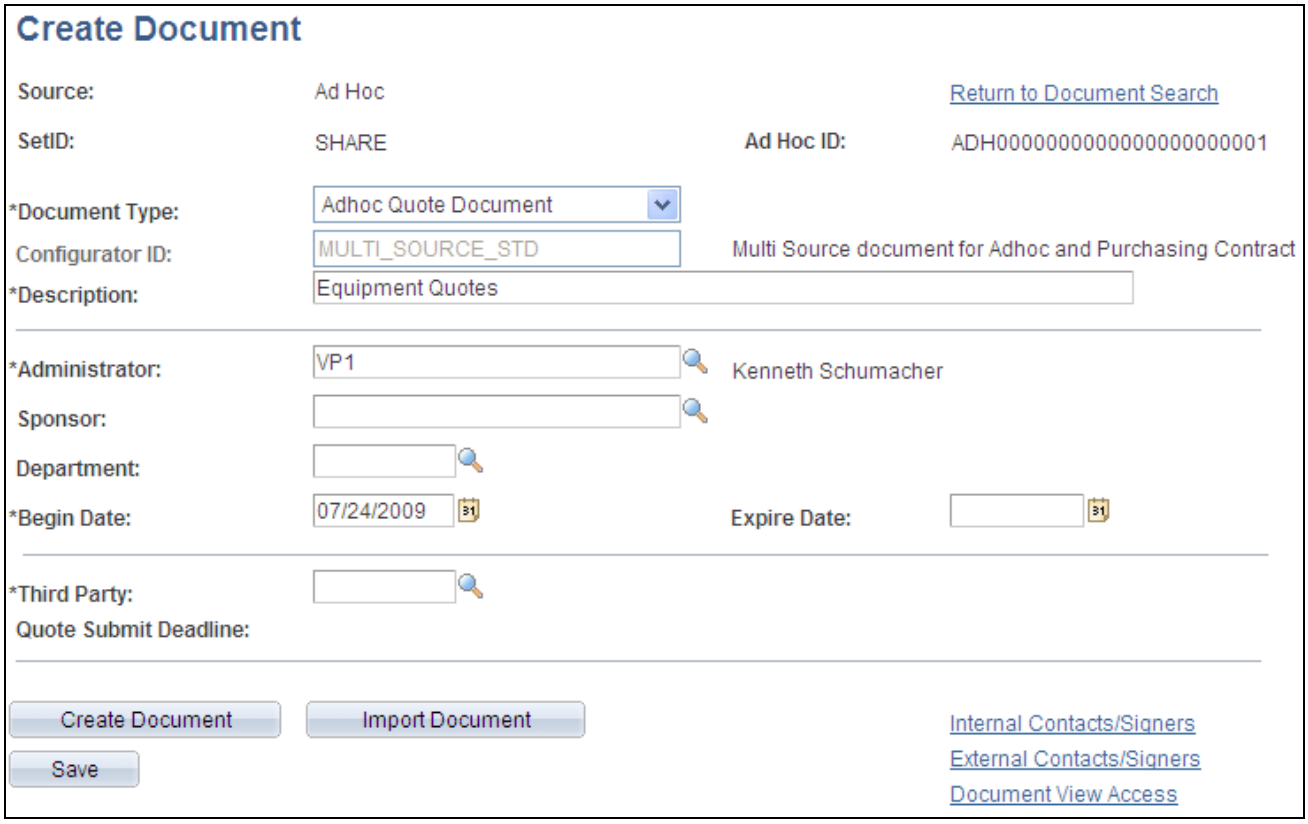
Note. If the document type you are using has the Automatic Document Creation check box selected, when you click the Add a Document button, the system immediately generates the document using the values specified in the document type and bypasses the Create Document page.

Access the Create Document page by clicking the Add a Document button.



Create Document page for ad hoc sources

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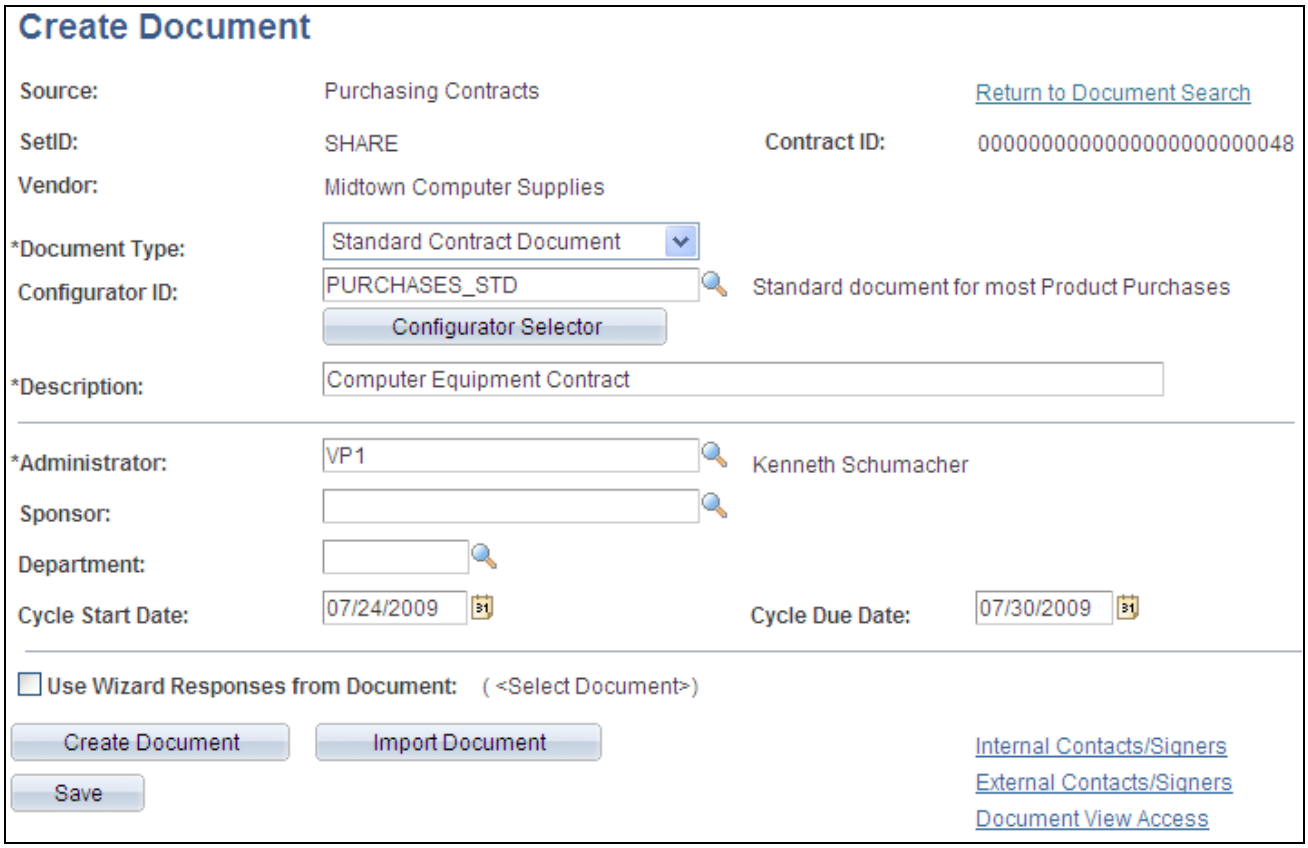
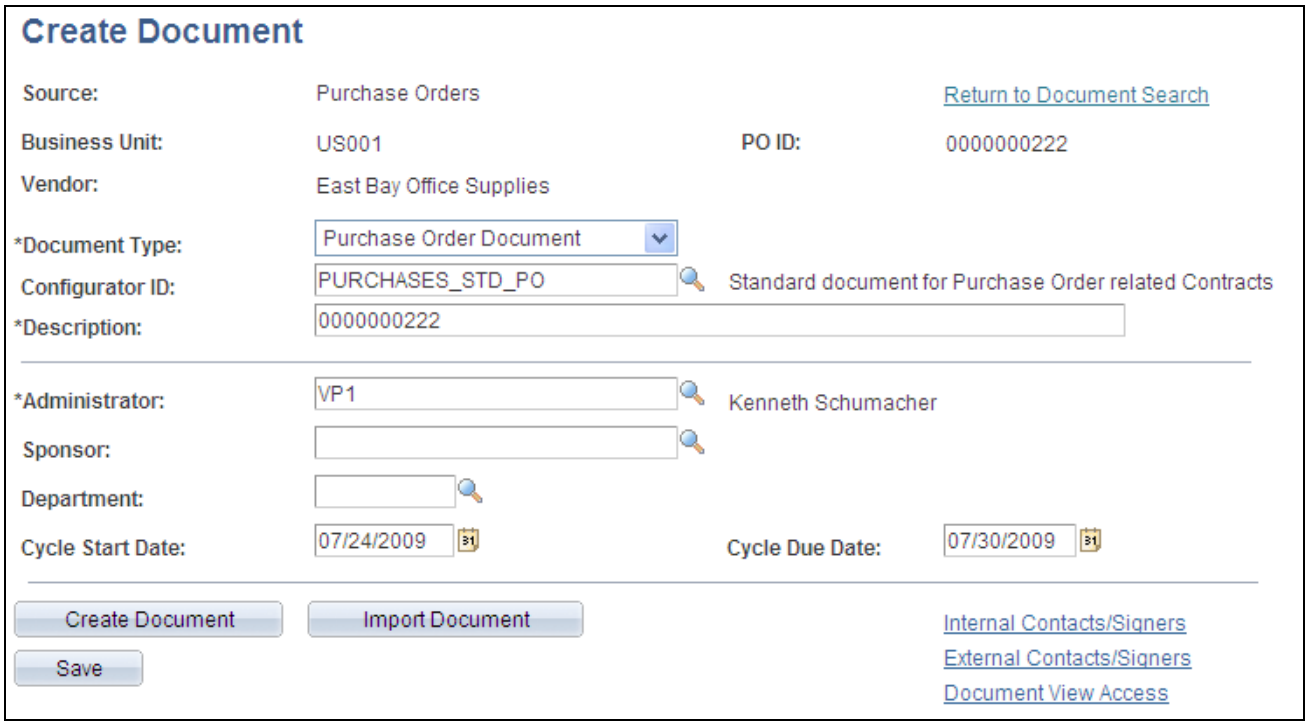


Create Document page for purchasing contract sources



Create Document page for purchasing order sources

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Use these pages to review and enter supplemental information and to create the contract document for ad hoc, purchase orders, and purchasing contract documents.

Document Type 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.

Configurator Selector 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.

Configurator ID If you use a document type that has a specific configurator ID defined for it, the system automatically populates the Configurator ID 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 Configurator ID 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.

Begin Date 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.

Expire Date 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.

Description Enter a description for the document. For purchasing contract source types, the system displays the description from the actual purchasing contract. You can override the description.

Cycle Start Date 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.

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Cycle End Date

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.

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.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Cycle Time Settings, page 236.

Note. 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.

Use Wizard Responses from Document

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 Allow using wizard responses from a prior document check box selected.

This feature is available for all document types, but is primarily used with purchasing contracts when you most likely would want to pull answers from an ad hoc contract request document into the formal purchasing contract document as a starting point for the contract specialist to work from.

For example, when a purchasing contract is created from an awarded requisition and you add a document for that contract, the system displays a page indicating that the contract ID is linked to one or more requisitions, which are tied to ad hoc contract request documents, and asks you whether you want to use the answers from those documents to create this document.

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 Use Wizard Responses from Document field. Click the Select Document 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.

Select Document

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.

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Create Document 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.

Note. If the document configurator uses a wizard, the system presents the questions to the document author before generating the document.

See Chapter 12, "Generating Microsoft Word Documents," page 441.

Import Document Click to import an document that was created outside of Supplier Contract Management. You can import a document into purchasing contract, purchase order contract, and ad hoc contract source transactions types.

See Chapter 11, "Importing Clauses, Sections, and Documents," Understanding Document Import, page 426.

Internal Contacts/Signers Click to access the internal contacts list where you can add internal collaborators and configure the signing settings.

See Chapter 13, "Managing Document Life Cycles," Maintaining Internal Contact Lists, page 559.

External Contacts/Signers Click to access the external contacts list where you can add external collaborators, enable supplier portal access, and configure the signing settings.

See Chapter 13, "Managing Document Life Cycles," Maintaining External Contact Lists, page 561.

Document View Access Click to view or grant access authority to contract documents for user roles and collaborators.

See Chapter 13, "Managing Document Life Cycles," Granting Document View Access, page 563.

Note. For purchasing contract and purchase order source types, you need to create the transactional data before adding a contract document. The Defining Supplier Contracts chapter describes the creation process and highlights how you use PeopleSoft Supplier Contract Management with contracts.

See Also

Chapter 3, "Defining Supplier Contracts," Creating Purchasing Contracts (Contract Entry), page 37

Creating Ad Hoc Documents for Requisitions Using Document Management

Access the Add a Document page (Supplier Contracts, Create Contracts and Documents, Document Management).

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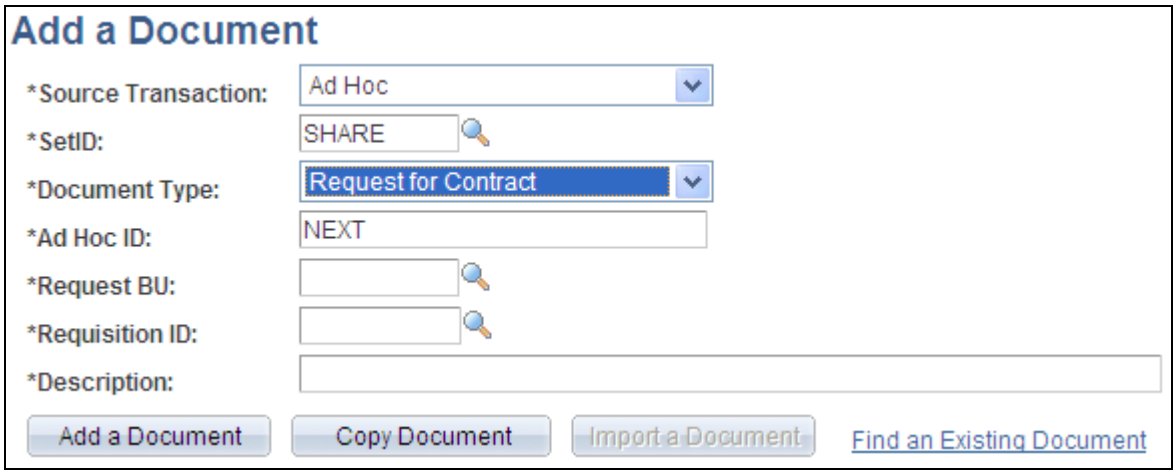

Add a Document page for requisitions

When you select a document type that is for use with a requisition, the system updates the Add a Document page with two fields. This enables you to link to requisitions created in PeopleSoft eProcurement or Purchasing.

Document types make it possible for you to create documents and wizards for requisitions that will eventually turn into new contracts. Requisition documents define a request document and wizard that capture additional information from the requestor. When you award the requisition to a contract or purchase order and then create the contract document from that source, you 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. 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.

Request BU (request business unit)

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.

Note. If you access this page directly from an eProcurement or Purchasing requisition page, the system automatically populates the field.

Requisition ID

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.

After the requisition is approved, buyers can use the document as supplemental information as they progress through the requisition process.

Note. If you access this page directly from an eProcurement or Purchasing application requisition page, the system updates this field.

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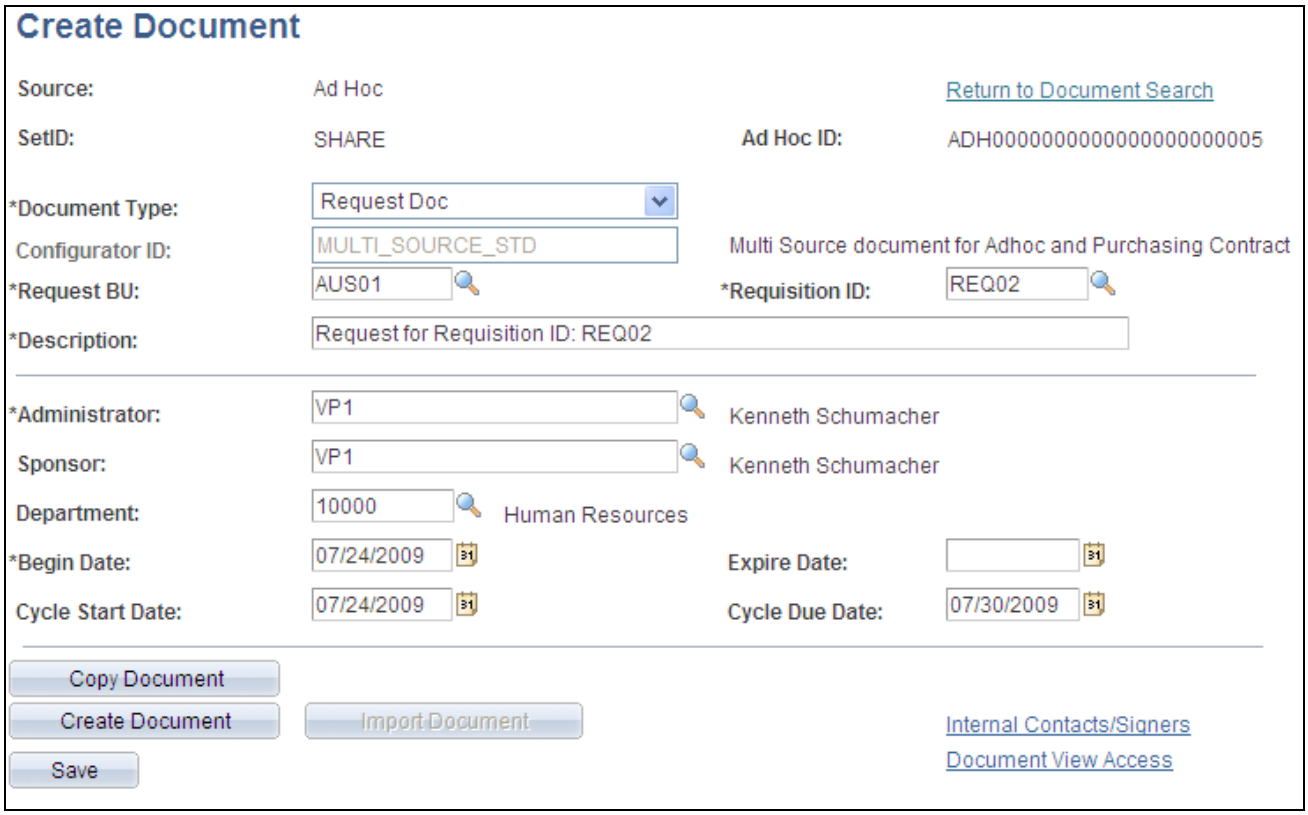
Note. Steps for creating an ad hoc document for use with requisitions are the same as for a stand-alone ad hoc document, except that you must be using a document type that enables you to link to the requisition ID when you add the document. You can also launch document creation from Purchasing or eProcurement requisition pages.

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 for you to select a document type.



Create Document page for a requisition

Use this page to define document attributes for the requisition document. You can also import a document to use with the requisition.

See Chapter 3, "Defining Supplier Contracts," Adding Purchasing Contract Documents, page 45.

Copying Documents Using Document Management

Access the Copy Document page (Click the Copy Document button on the Add a Document page).

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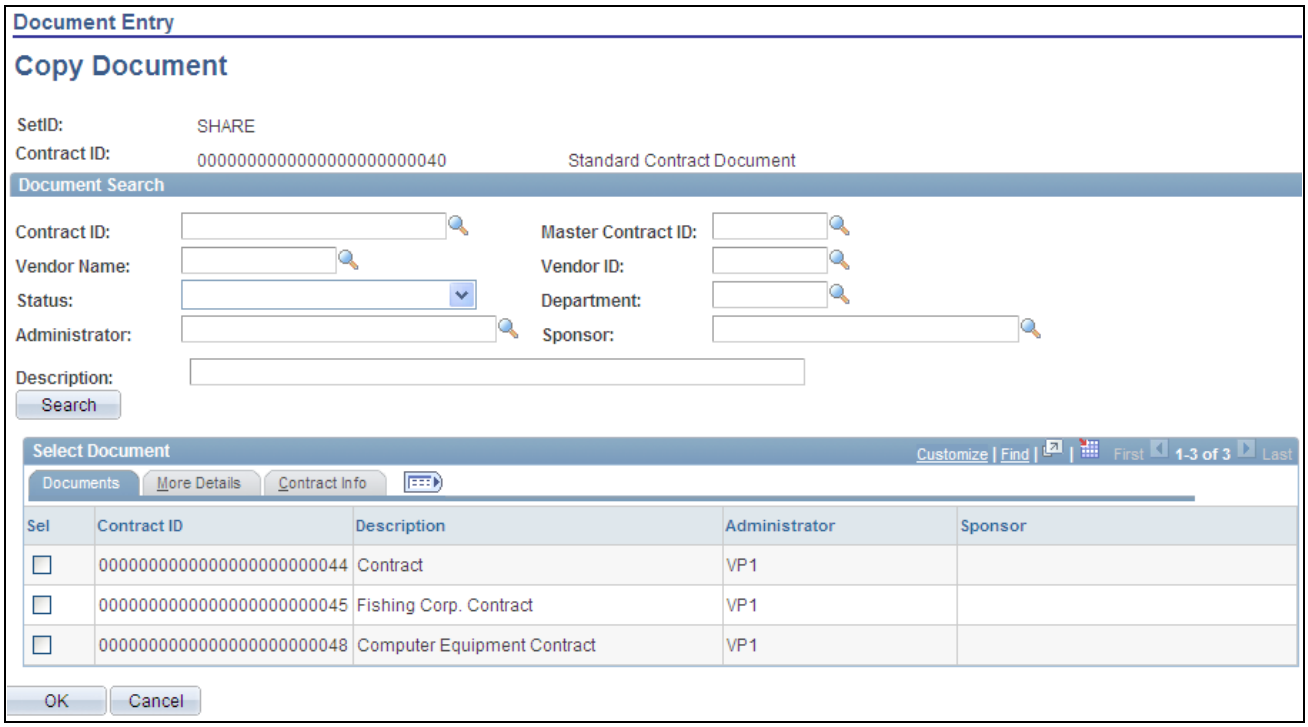

Copy Document page

Use this page to search for existing documents. The page content depends the type of document that you selected to copy 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. And, for purchase order documents, the search criteria relates to purchase order information.

The Copy From Source and SetID fields appear when you are using a document configurator that has been defined for use with multiple transaction sources. This enables you to copy a document, for example, from an ad hoc document to a purchase order contract document when both documents use the same configurator. Also, the document type must allow copying from one source to another. When you select the source type to copy from and select a setID, the system verifies the setID and business unit corresponding to the ID, and makes only those documents for the copy from source type available for you to select. When you select to copy a multiple source document, the system displays an indicator on the Create Document page that the document is copied, its set ID, and document ID.

After you click the Search button, the system provides you the documents matching the search criteria that you enter. Select the Sel (select) check box to choose 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 an Executed status, and if a separate amendment exists for the document you want to copy. Only the latest version of the main contract will be copied.

The system performs searches based on matching source transactions, existing contract documents, contract process options, and document types. You cannot copy imported documents. The search results are limited to those contracts that match the selection criteria you define.

Searches also include the following criteria:

- The document must already exist.

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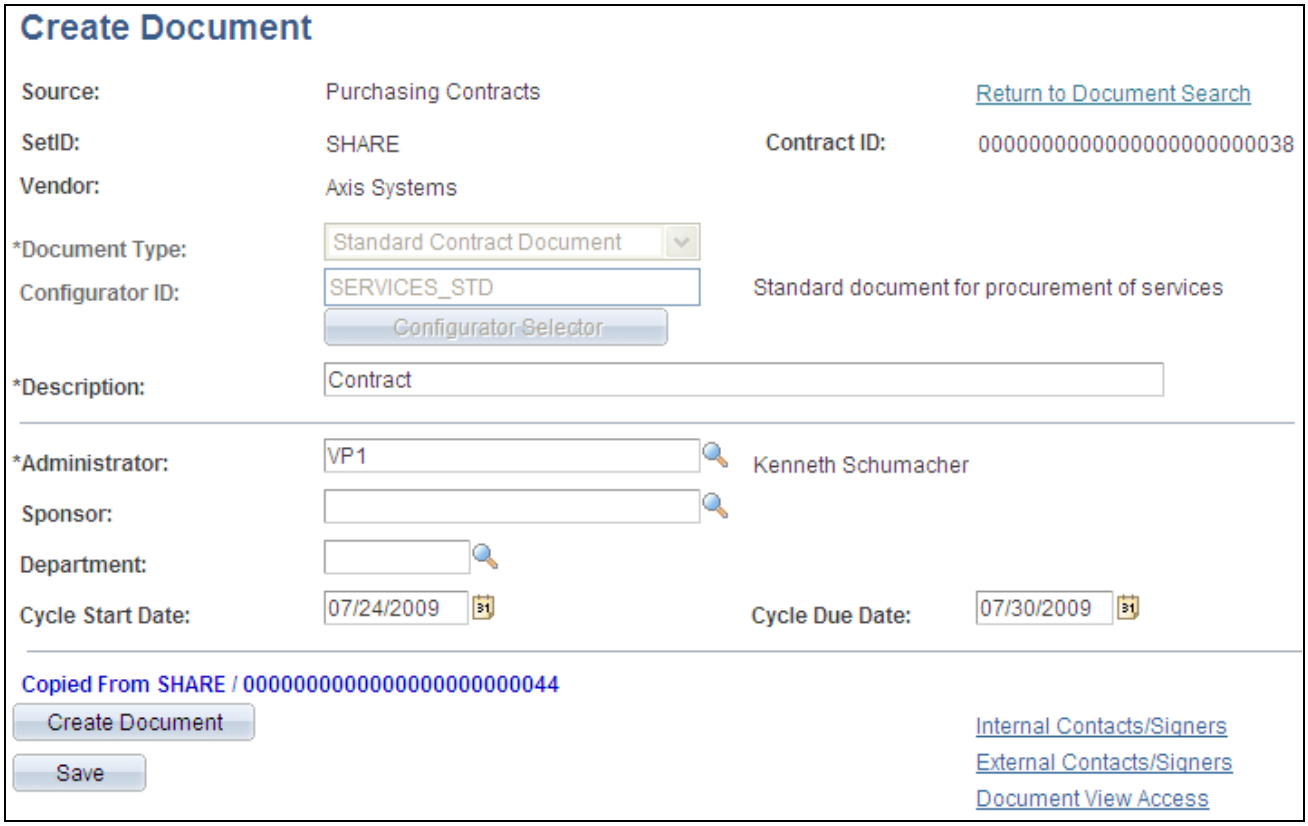
- The source transaction must be of the same type, unless you select a multiple source configurator
- Documents returned in the search must match document type.
- Purchase order contracts, must match contract process options.

  So, if you are searching for a particular contract and the process option does not match, that contract will 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.



Create Document page for copying documents

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 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 edits made to the source document are preserved as much as possible in the target.

Note. The system tracks whether a contract was created through contract copy and what contract was used as the source of the copied contract, it can be viewed using the Document Version History link on the Document Management page.

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Importing Contract Documents

Access the Import Document page (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 those preexisting contracts and documents that were not created in the document authoring system. For example, you may choose to import legacy documents that are still active contracts so that you can collaborate on, approve, and, if the document format is supported for Verity searches, include for document searches.

See Also

Chapter 11, "Importing Clauses, Sections, and Documents," Importing Contract and Ad Hoc Documents, page 425

Creating and Copying Contracts Using Contract Entry

Access the Contract page (Supplier Contracts, Create Contracts and Documents, Contract Entry).

Use this page to initiate the creation of ad hoc, purchase order, and purchasing contract documents. You can:

- Create a document directly by clicking the Add a Document button.
- Access a document by using the Maintain Document button.
- Create a contract and document by clicking the Copy From Contract link.

  When you copy a new contract from an existing contract and that contract already has a document, the system enables you to copy the document from the existing document for the contract you are creating.

See Also

Chapter 3, "Defining Supplier Contracts," Adding Purchasing Contract Documents, page 45

Finding Authored Documents

This section describes how to find an existing document.

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Page Used to Find Authored Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Find an Existing Document	CS_DOC_FIND	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.	Find an existing document.

Finding an Existing Document

Access the Find an Existing Document page (Supplier Contracts, Create Contracts and Documents, Document Management, and click the Find an Existing Document link for a purchasing contract or ad hoc document on the Add a Document page.

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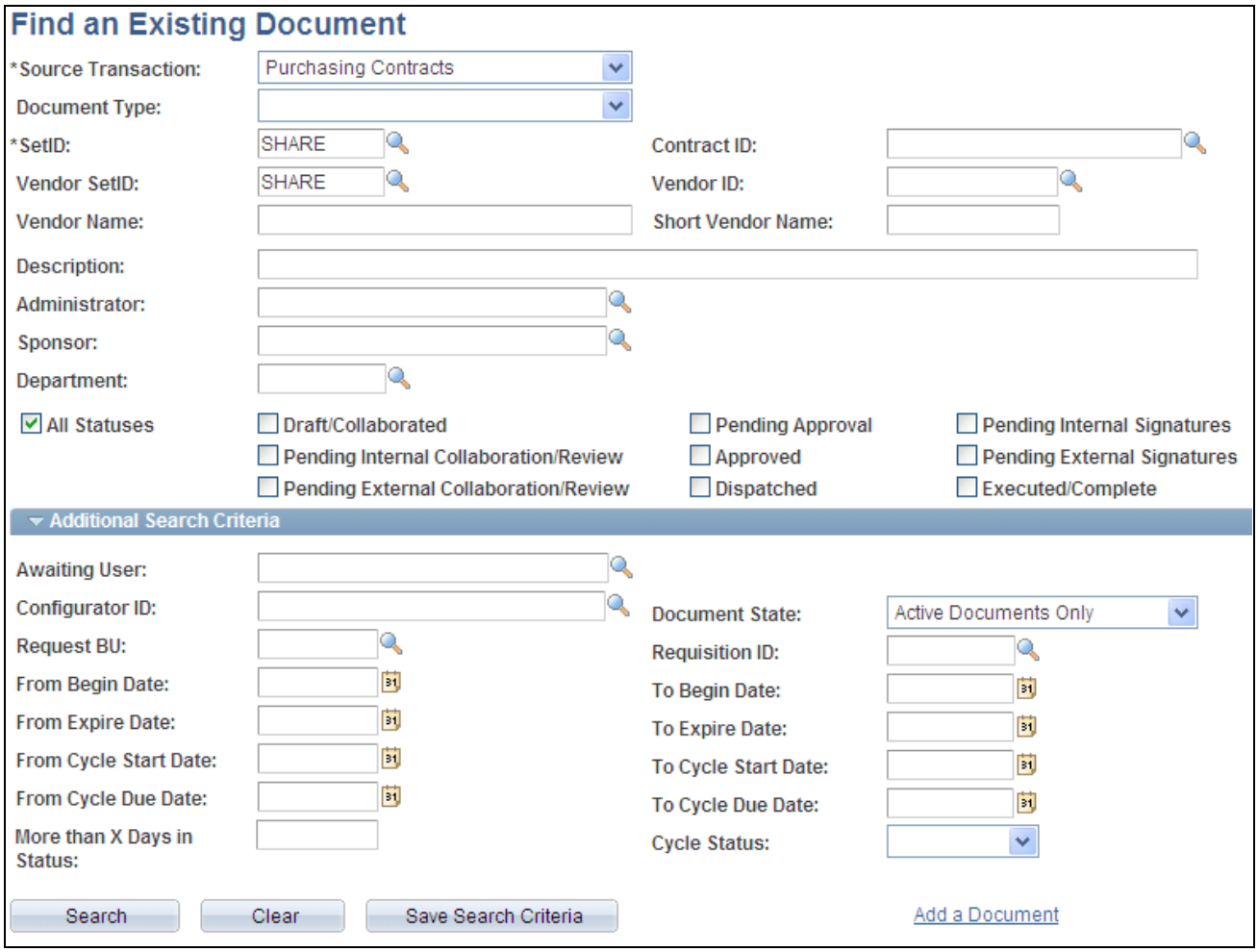

Find an Existing Document page (1 of 2)

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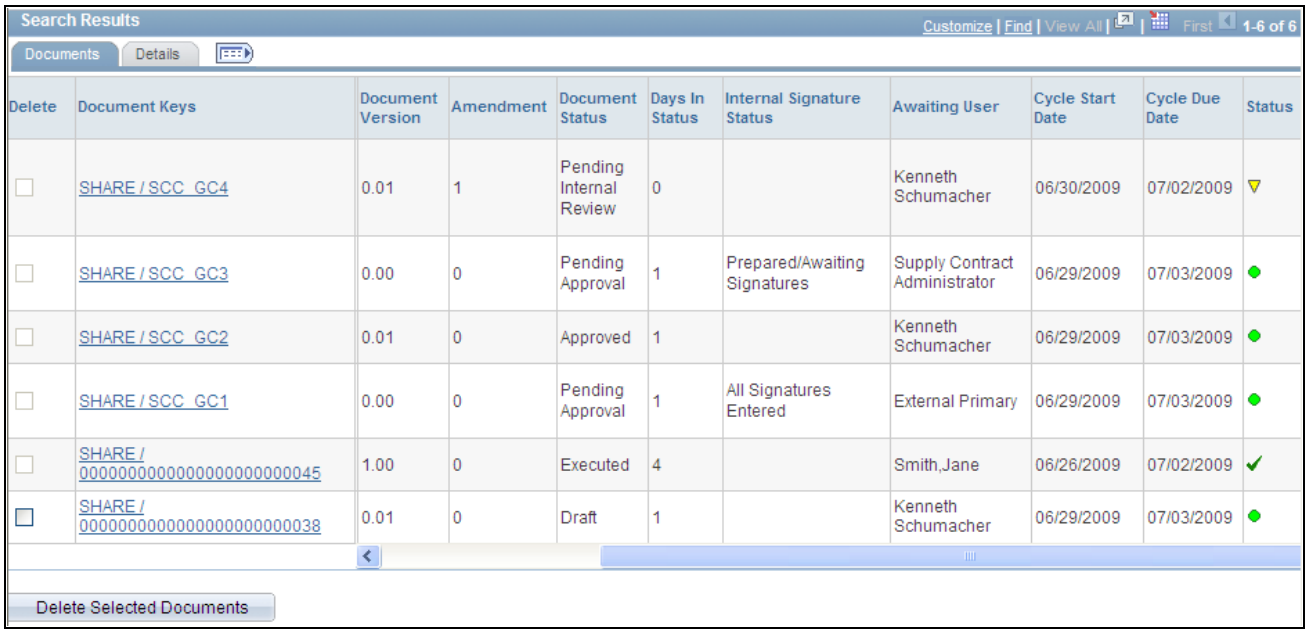

Find an Existing Document page (2 of 2)

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 multiple collaborators are behind schedule, you can view the status of the document, such as the user on whom the document is awaiting. On the Find Existing Document page, check boxes are available that enable you to perform a more granular selection of documents in various statuses. An option is also provided to save the search settings so that common settings and the start page can appear as default values.

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.

Source Transaction 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 *Ad Hoc*,*Purchase Orders*, and *Purchasing Contracts*. The source transaction that you select determines which fields are available on this page.

Document Type Select a document type to narrow down the results to only documents that are associated to that document type.

Set ID Select a setID on which to base the search.

Business Unit Select a business unit ID on which to base the search. This field is available when you select a purchase order source transaction.

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Ad Hoc ID	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.
PO ID (purchase order number)	Select a PO ID on which to base the search. This field is available when you select a purchase order source transaction.
Contract ID	Select a contract on which to base the search. This field is available when you select a purchasing contract source transaction.
Vendor SetID	Select a vendor set ID on which to base the search. This field is available when you select either a purchase order or purchasing contract source transaction.
Vendor ID	Select a set ID on which to base the search. This field is available when you select either a purchase order or purchasing contract source.
All Statuses	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.
Draft/Collaborated	Select if you want to only include documents in the search results that are in a Draft or Collaborated status.
Pending Approval	Select if you want to only include documents in the search results that are pending approval.
Pending Internal Signatures	Select if you want to only include documents in the search results that are pending internal signatures.
Pending Internal Collaboration/Review	Select if you want to only include documents in the search results that are pending internal collaboration or reviews.
Approved	Select if you want to only include documents in the search results that have been approved.
Pending External Signatures	Select if you want to only include documents in the search results that are in pending external signatures.
Internal Collaboration Statuses	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.
Pending External Collaboration/Review	Select if you want to only include documents in the search results that are in external collaboration statuses.
Dispatched	Select if you want to only include documents in the search results that are in a Dispatched status.
Executed/Complete	Select if you want to only include documents in the search results that are in an Executed or Complete status.

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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.

Awaiting User — 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.

Configurator ID — Select a document configurator on which you want to base this search.

Document State — Select a document state. A state can be active of 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 Deactivate button on the Document Management page. The default value for the field is *All Active Documents.*

Request BU (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 Use with PO Requisition check box must be selected on the Installation Options page to use requisition documents.

Requisition ID — Select a Requisition ID to narrow the search results to only those documents tied to a specific requisition.

From Begin Dateand **To Begin Date** — Select a from and to begin date to establish a begin date range on which to base the document search.

From Expire Date and **To Expire Date** — Select a from and to expire date to establish an expiry date range on which to base the document search.

From Cycle Start Date 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.

From Cycle Due Date 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.

More than X Days in Status — 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.

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Cycle Status Select a specific cycle status on which to base a search. For example, you can set the cycle status to *Red* 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.

Green: Indicates that the document or amendment is on schedule.

Red: Indicates that the document or amendment is close to or past its target cycle-end date and is not yet complete.

Yellow: Indicates that the document or amendment is nearing its target cycle-end date.

Note. 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 Red number of days prior to Due Date and Yellow number of days prior to Due Date fields determine the search results.

Search Click to initiate a document search that populates the lower part of the page.

Clear Click to clear any entered search criteria.

Save Search Criteria 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.

Note. 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.

Delete Saved Criteria Click to delete any previously saved search criteria if it is no longer needed.

Add a Document 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:

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- 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.

Delete Click to mark this document for removal from the system. When you select the Delete Selected Documents 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.

Document Keys 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:

- If the contract document is an ad hoc transaction source, the document key displays the setID and the contract document description.
- If the contract document is a purchase order source transaction, the document key displays the business unit ID along with the purchase order ID.
- If the contract document is a purchasing contract source transaction, the document key displays the set ID along with the purchasing contract ID.

Document Version Displays the version of the document. To access the document, click the Document Keys link to access the Document Management page where you can view version history.

Note. 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.

Amendment Displays the number of amendments that have been created for the document.

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Document Status Displays the status of the document. Status values include:

Draft

Pending Approval

Collaborated, Pending Review (internal and external)

Collaborated (internal and external)

Pending Collaboration (internal and external)

Pending Approval

Approved

Dispatched

Executed

Completed

Days in Status Displays the number of days that a document has been at the status that appears in the Document Status field.

Awaiting User 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.

Note. When the Multiple Users 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.

Checked Out Displays the value *Yes* if the document is currently checked out. The user ID who has the document checked out, is displayed in the Awaiting User field.

Cycle Start Date Displays the date on which the document's cycle started.

Cycle Due Date Displays the date on which the document should be completed.

Status Displays the document's cycle status using symbols. The symbols include a:

Green check mark: Indicates that the document has completed its cycle based on the values defined at the document type or the installation option level.

Green circle: Indicates that the document is still within the current cycle and is not close to its target due date.

Yellow triangle: Indicates that the document is within the defined yellow days on the corresponding document type from the target due date.

Red square: Indicates that the document is within the defined red days on the corresponding document type from the target due date.

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Delete Selected Documents Click to delete the documents that you have selected in the Delete 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 FTP servers and applicable rows in the database.

After you delete documents you might need to rebuild the Verity indexes, depending on when the indexes were last run. Rebuilding the index removes the deleted documents from Verity search results.

Details

Access the Details tab.

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.

Inactive Displays as selected when the document has been deactivated using the Deactivate Document button on the Document Management page. You can reactivate the document using the Reactivate Document button on the Document Management page.

Document ID Displays the system-assigned number for this document. The system assigns these numbers as it creates ad hoc, purchase order, and purchasing contract documents.

Maintaining Contract Documents

This section discusses how to maintain documents.

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Page Used to Maintain Contract Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Management	CS_DOC_MAINT	• 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.	Maintain documents.

Maintaining Documents

Access the Document Management page (Click the Find an Existing Document link for a purchasing contract, purchase order, or ad hoc document on the Add a Document page).

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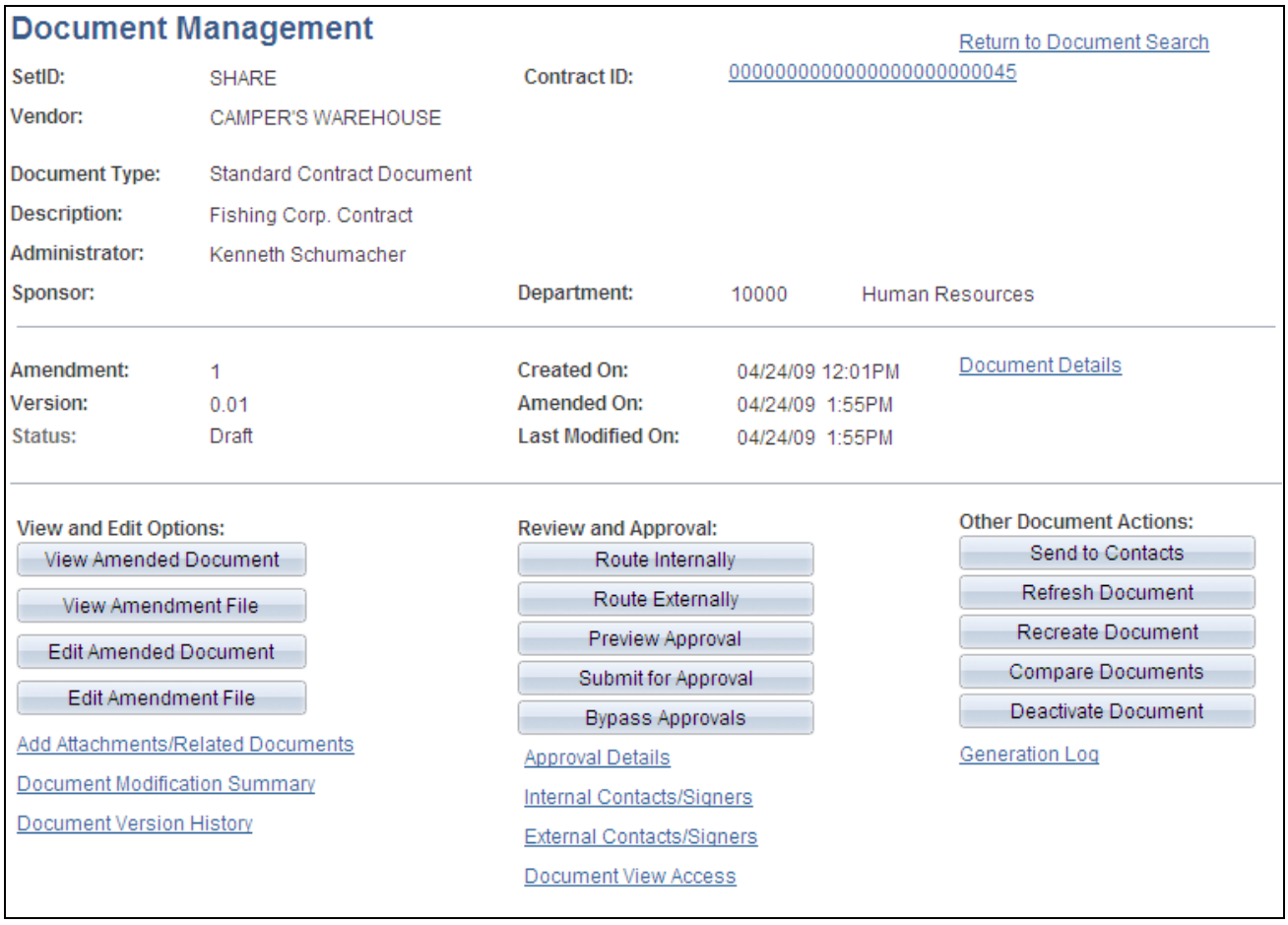

Document Management page

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 section 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 in This Chapter section. The Life-Cycle Statuses and Actions section also provides more detailed information about this page.

Note. The document status of the document along with its collaboration and approval status determine the actions that you can perform against 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.

See Chapter 13, "Managing Document Life Cycles," Document Actions, page 467.

These fields and buttons are available:

Return to Document Search 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.

Ad Hoc ID Displays the ad hoc identifier. The field only appears for ad hoc source transactions.

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Contract ID Displays the system-defined identifier for the PeopleSoft Purchasing contract for which you are creating or maintaining documents. The field only appears for purchasing contract source transactions. .

PO ID 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.

Document Type Displays the document type that was used to create the document. .

BU/Requisition (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.

Amendment Configurator ID 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 Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," Creating Document Amendments, page 694.

Document Details Click to access the Document Details page, where you can update the administrator, document type, sponsor, department, document description, and user-defined fields.

See Chapter 13, "Managing Document Life Cycles," Maintaining Document Details, page 519.

Description Displays either a contract description or a user-defined description for the document that is identified in the Document ID field. Use the Document Details link to add or update the description.

Version 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 Allow Check in as Same Version 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.

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Add Attachments/Related Documentsand **Modify Attachments/Related Documents**

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.

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 Where Used as Related Document 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.

See Chapter 13, "Managing Document Life Cycles," Viewing and Uploading Attachments and Related Documents, page 554.

Status

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 Draft.

Field values can be *Draft, Pending Collaboration, Collaborate Pending Review, Pending External Collaboration, Pending Internal Review, Collaborated, Pending Approval, Approved, Dispatched,Completed,*and *Executed.*

If document approvals are not required, the Pending Approval status is not applicable.

View Document

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.

Note. 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.

Note. 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 Document Actions table.

See Chapter 13, "Managing Document Life Cycles," Document Actions, page 467.

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Edit Document

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.

Note. 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 Chapter 13, "Managing Document Life Cycles," Viewing and Editing Documents, page 522.

Note. For more information about the individual buttons, see the Document Actions table. This is an alphabetic display of all buttons and actions available on the Document Management page.

See Chapter 13, "Managing Document Life Cycles," Document Actions, page 467.

Document Version History

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 Chapter 13, "Managing Document Life Cycles," Viewing Document History, page 532.

Route Internally

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 Chapter 13, "Managing Document Life Cycles," Collaborating on Documents, page 542.

Preview Approval

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 Chapter 17, "Approving Documents and Document Components," Previewing Approvals, page 668.

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Submit for Approval

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 Submit for Approval button, the system sets the contract status to *Approved.*

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 Chapter 17, "Approving Documents and Document Components," Submitting Documents for Approval, page 669.

Bypass Approvals

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.

Note. To authorize an administrator to bypass approvals, you must select the Bypass Approvals check box for the user. To access the setting, select Supplier Contracts, Supplier Contracts Setup, Define User Preferences.

Internal Contacts/Signers

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 Chapter 13, "Managing Document Life Cycles," Routing Documents for Internal Collaboration, page 547.

External Contacts/Signers

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 Send to Contacts or Dispatch button. Contacts that you define here are default values for sending documents to contacts and for dispatching documents.

See Chapter 13, "Managing Document Life Cycles," Setting Up Default Document Preferences, page 539.

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Document Modifications Summary

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.

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.

Note. 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.

See Chapter 13, "Managing Document Life Cycles," Viewing Document Modification Summaries, page 553.

Document View Access

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 Chapter 13, "Managing Document Life Cycles," Granting Document View Access, page 563.

Send to Contacts

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 Chapter 13, "Managing Document Life Cycles," Sending Documents to Internal and External Contacts, page 558.

Refresh Document

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 Chapter 13, "Managing Document Life Cycles," Refreshing Documents, page 515.

See Chapter 12, "Generating Microsoft Word Documents," Refreshing Microsoft Word Documents, page 451.

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Recreate Document 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 Chapter 13, "Managing Document Life Cycles," Re-creating Documents, page 517.

See Chapter 12, "Generating Microsoft Word Documents," Generating Microsoft Word Documents, page 445.

Attach to Requisition 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 Chapter 13, "Managing Document Life Cycles," Creating Ad Hoc Documents for Requisitions Using Document Management, page 491.

See Chapter 3, "Defining Supplier Contracts," Adding Requisition Documents and Wizard Responses, page 53.

Compare Documents 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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Document Comparison and Rendering Setup, page 224.

Deactivate Document 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 Deactivate button, the page displays a deactivate message and enables the Reactivate button.

See Chapter 13, "Managing Document Life Cycles," Deactivating and Reactivating Documents, page 589.

Reactivate Document Click to activate a deactivated document. This action makes the document available for use. When you click the Reactivate button, the page displays the document at the same status it was when it was deactivated and enables the appropriate buttons.

See Chapter 13, "Managing Document Life Cycles," Deactivating and Reactivating Documents, page 589.

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Where Used as Related Document

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 Chapter 14, "Searching for Library and Document Contents," Performing Where-Used Searches, page 620.

Generation Log

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 Log at Document Generation 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.

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 Chapter 12, "Generating Microsoft Word Documents," Viewing Document Generation Logs, page 453.

Refreshing and Re-creating Documents

This section provides an overview of document refresh and re-creation and discusses how to:

- Refresh documents.
- 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.

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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.

See Also

Chapter 12, "Generating Microsoft Word Documents," Generating Microsoft Word Documents, page 445

Chapter 12, "Generating Microsoft Word Documents," Refreshing Microsoft Word Documents, page 451

Pages Used to Refresh and Re-create Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Refresh Document Options	CS_DOC_VERSIONS_SP	Supplier Contracts, Create Contracts and Documents, Document Management Click the Refresh Document button on the Document Management page.	Refresh documents.
Recreate Document Options	CS_DOC_VERSIONS_SP	Supplier Contracts, Create Contracts and Documents, Document Management Click the Recreate Document button on the Document Management page.	Re-create documents.

Refreshing Documents

Access the Refresh Document Options page (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.

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Click the OK button to continue with the refresh. Click the Cancel button to return to the Document Management page without refreshing the document.

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.

Amendment Option 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:

- When the amendment option is Amend Contract Only, the Refresh process updates the latest version of the amended document similar to how it refreshes an original document.
- When you are refreshing with the Amend Contract with Amendment Files 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.
- If the amendment option is Amendment Files Only, the refresh always applies only to the amendment file itself. In this case, the main document is never updated.

Same Version 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.

Minor Version 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. 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.

Major Version 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. 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. When re-creating or refreshing amendments, the system also updates the version number.

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Refresh Main Contract File

This check box appears only when you use the *Amend Contract with Amendment Files* 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.

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 *Amend Contract with Amendment Files* 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.

When you refresh the document, you also can update wizard questions and answers.

Refresh Amendment File

Select to refresh only the amendment file that is attached to the main document. This option applies only when the amendment option is *Amend Contract with Amendment Files* and the current document is in an amendment cycle.

Update Amendment File

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.

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 *Amend Contract with Amendment Files* 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.

Comments

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.

See Also

Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," Creating Document Amendments, page 694

Chapter 12, "Generating Microsoft Word Documents," Refreshing Microsoft Word Documents, page 451

Re-creating Documents

Access the Recreate Document Options page (Click the Recreate Document button on the Document Management page).

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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 Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," Creating Document Amendments, page 694.

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.

Document Type

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.

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.

Configurator ID

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.

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. .

Configurator Selector

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.

Amendment Configurator ID

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 *Amend Contract with Amendments* or the *Amendment Files Only* amendment process options.

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Recreate Main Contract File This check box applies only when the amendment process option is *Amend Contract with Amendment Files.* 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.

Warning! 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.

Recreate Amendment File 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 *Amend Contract with Amendment Files* and the current document is in an amendment cycle.

Update Amendment File 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.

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 *Amend Contract with Amendment Files* 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.

See Also

Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," Creating Document Amendments, page 694

Chapter 12, "Generating Microsoft Word Documents," Generating Microsoft Word Documents, page 445

Maintaining Document Details

This section discusses how to maintain document details (click the Document Details link on the Document Management page).

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Page Used to Maintain Document Details

Page Name	Definition Name	Navigation	Usage
Document Details	CS_DOC_CHANGE_SP	Supplier Contracts, Create Contracts, Document Management Click the Document Details link on the Document Management page.	Maintain document details.

Maintaining Details

Access the Document Details page (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.

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.

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.

Creating Executive Summaries

This section provides an overview of executive summaries and discusses how to create an executive summary.

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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

Pages Used to Create Executive Summaries

Page Name	*Definition Name*	*Navigation*	*Usage*
Executive Summary	CS_DOC_EX_SUMM	Supplier Contracts, Create Contracts and Documents, Document Management Click the Create Executive Summary button on the Document Management page.	Create an executive summary.
Create Executive Summary	CS_DOC_ACTIONS_SP	Click the Create Executive Summary button on the Executive Summary page.	Enter comments for an executive summary.

Creating an Executive Summary

Access the Executive Summary page (Supplier Contracts, Create Contracts and Documents, Document Management and click the Create Executive Summary button).

You use this page to create and update a corresponding executive summary document. To create an executive summary:

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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.

Note. While the system does not track version history, changes to executive summary documents are provided in the document history.

Viewing and Editing Documents

This section provides an overview of document edits and discusses how to:

- Edit documents.
- Check in documents.
- View documents.
- Cancel document checkout.

Understanding Document Edits

You can edit documents using Microsoft Office Word 2003 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 2003 use 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 Appendix A, "Microsoft Word Integration with Supplier Contract Management," page 701.

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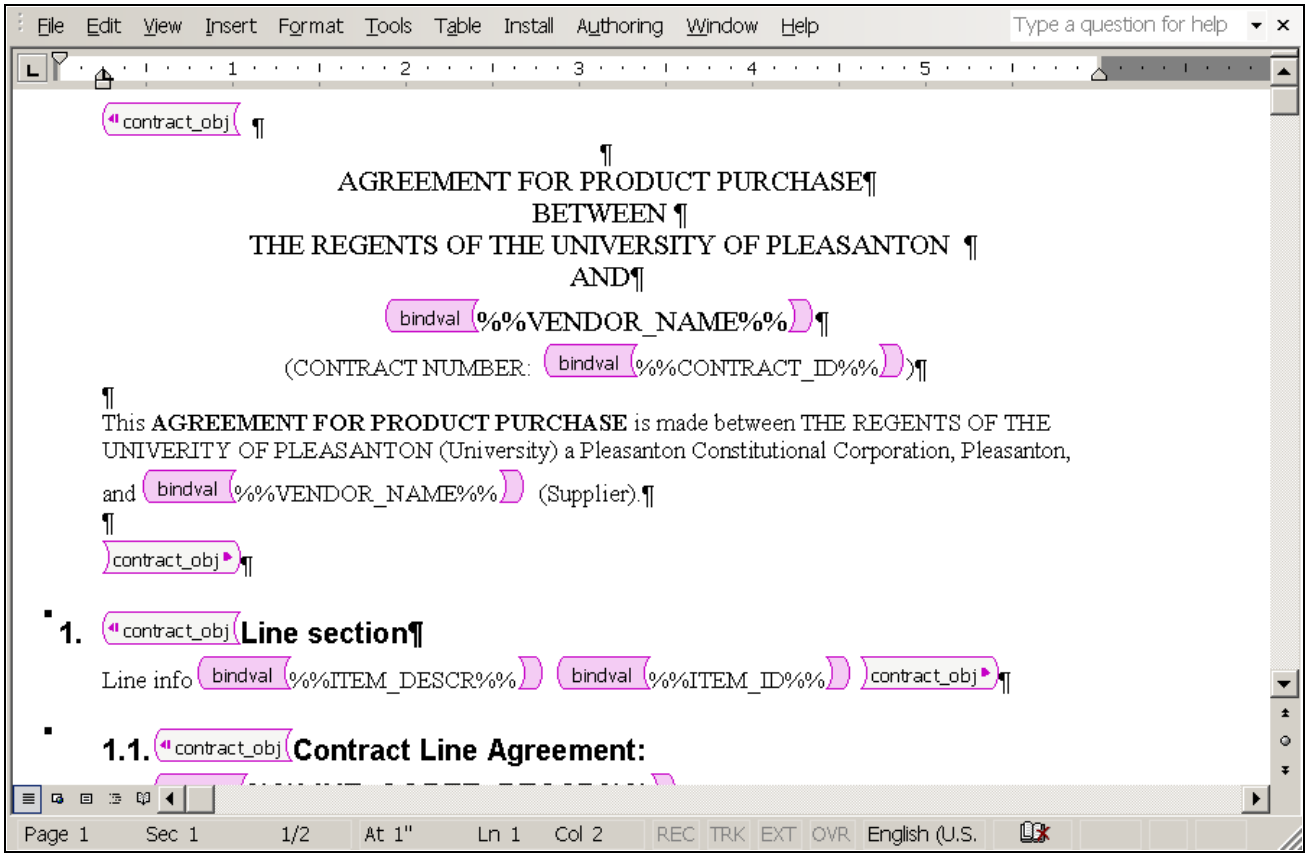
During editing and check-in, the XML tags enable the system and Microsoft Word to communicate properly. Because the XML tag structure defines the structure, Microsoft Word provides the capability to protect the XML tags that the PeopleSoft system uses to prevent damage to the tag structure. If you alter 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:



Example of Microsoft Word document and XML tags when you open the document for editing

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 Appendix A: Microsoft Word Integration with Supplier Contract Management.

See Appendix A, "Microsoft Word Integration with Supplier Contract Management," page 701.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," (Optional) Setting Up PeopleSoft Integration Broker for Microsoft Word and Adobe Integration, page 202.

See Chapter 9, "Managing the Contract Library," Clause Text Editing, page 278.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Installation Options for PeopleSoft Supplier Contract Management, page 223.

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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 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. 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.

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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 Verity index searches and for indicating clause additions, changes, and deletion 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.

See Also

Chapter 13, "Managing Document Life Cycles," Refreshing and Re-creating Documents, page 514

Pages Used to View and Edit Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Management	CS_DOC_MAINT	Supplier Contracts, Create Contracts and Documents, Document Management	Edit documents. View documents. Cancel document checkout.

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Page Name	Definition Name	Navigation	Usage
List of People to Notify	CS_DOC_NOTIFY_SP	Click the Notify Me button on the Document Management page.	Define users who should be notified when a document that is checked out is checked in. When you enter an user's email 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 Notify When Available Template field on the Installation Options page.
Check In Document	CS_DOC_VERSIONS_SP	Supplier Contracts, Create Contracts and Documents, Document Management Click the Check In button on the Document Management page.	Check in documents.

Editing Documents

Access the Document Management page (Supplier Contracts, Create Contracts and Documents, Document Management).

When you edit a document, the system places it on the 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.

To edit a document, click the Edit Document button. The File Download page appears:

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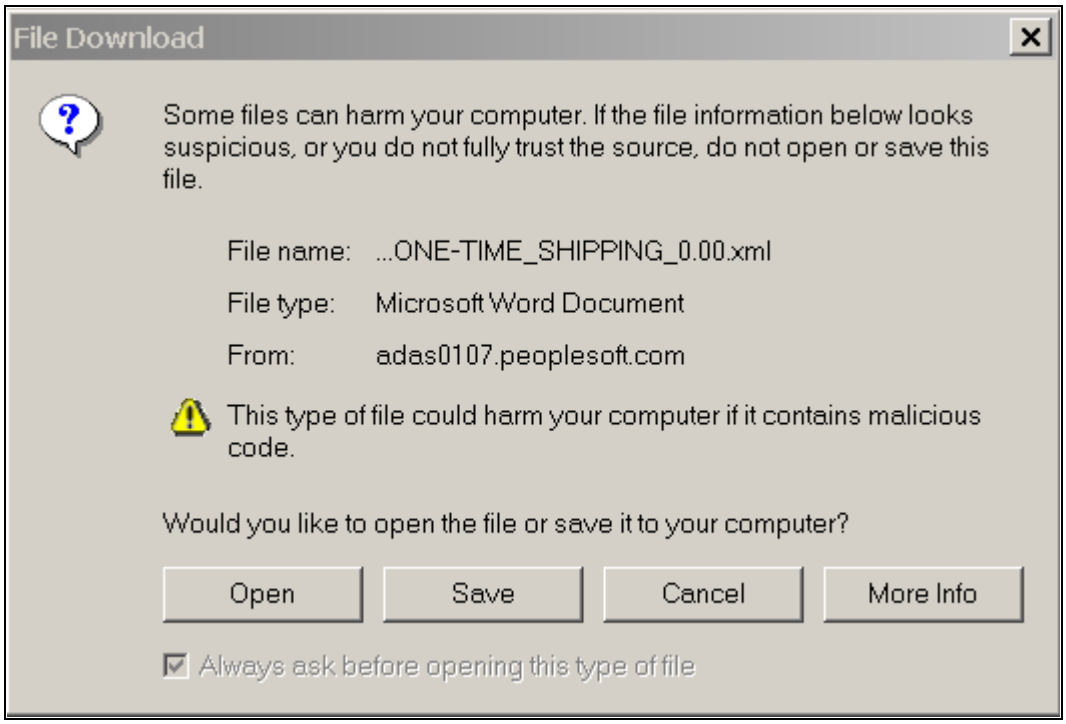

File Download page

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 Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," Amendment Processing, page 683.

Open

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.

Note. Opening Microsoft Word files directly using the browser might invoke a Microsoft Word browser plug-in. While this supports Microsoft Office Word 2003, WordML and XML, you should configure client machines to open Microsoft Word 2003 directly on the desktop. See the Microsoft web page for more information.

See Appendix A, "Microsoft Word Integration with Supplier Contract Management," page 701.

Save

Select to save the file in a directory on the local computer.

Note. 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.

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Cancel	Select to cancel checking out the file. This enables you to select certain amendments to open while canceling the checkout of others.
More Info (more information)	Select to access the Microsoft Internet Explorer Help utility and web page, where you can view more information about downloading files.

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 an Microsoft Word 2003 .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.

Checking In Documents

Access the Check In Document page (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.

Version	Select the option for how you want the version to increment for the file that you are checking in.
Same Version	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 Allow Check-In as Same Version check box on the Document Format and Options page.
Minor Version	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 *0.01* as the version number.
Major Version	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 *1.00* as the version number.

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Update Amendment File 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.

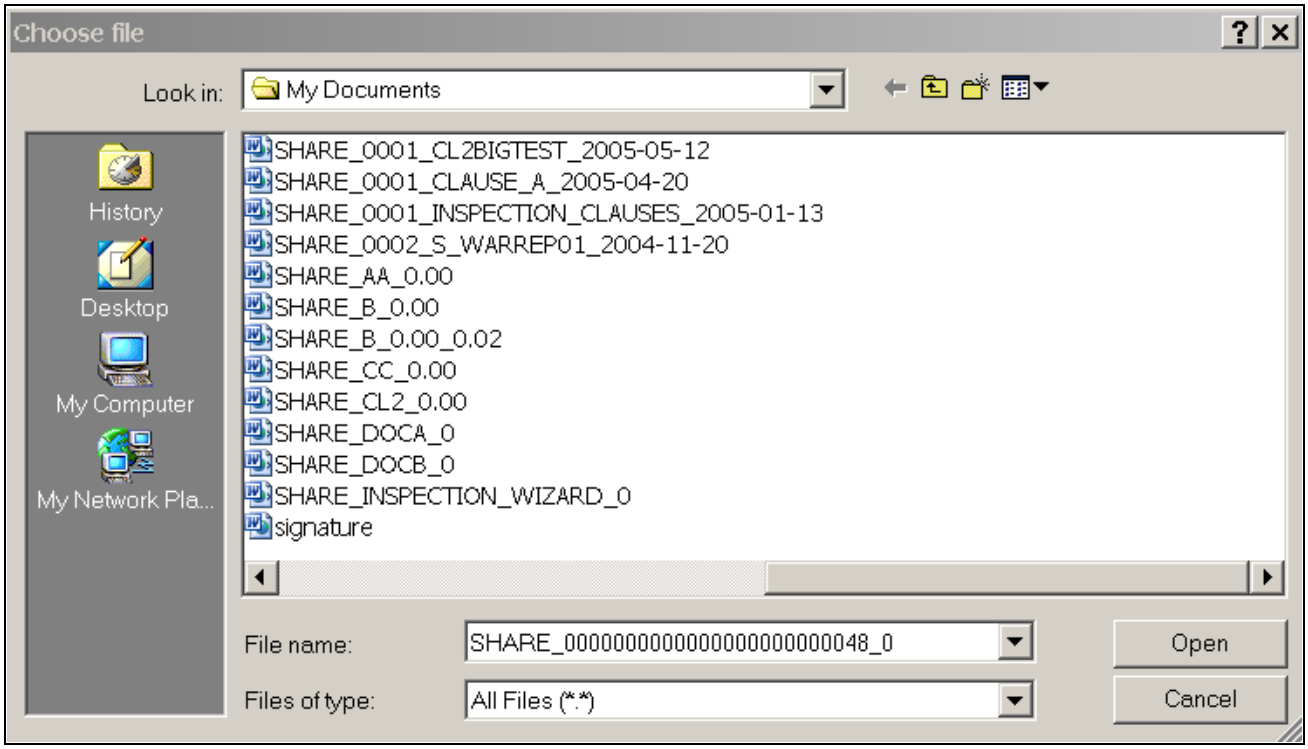
This option enables you to edit only the main contract and have the comparison performed for you to extract changes to the separate amendment file as a starting point for edits within the separate amendment file. This option applies only when the amendment option is *Amend Contract with Amendment Files* 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.

Comments 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 Document Version History 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.



Choose file page

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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

Access the Document Management page (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.

See Also

Chapter 13, "Managing Document Life Cycles," Viewing Documents, page 530

Canceling Document Checkout

Access the Document Management page (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 might 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

This section discusses how to:

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- View document history.
- View source version history.
- View attachment and related document history.
- View dispatch history.
- View collaboration history.
- View generation history.

Pages Used to View Document Version History

Page Name	*Definition Name*	*Navigation*	*Usage*
Document History	CS_DOC_HIST	Supplier Contracts, Create Contracts and Documents, Document Management Click the Document Version History link on the Document Management page.	View document history.
Attachment and Related Document History	CS_DOC_ATTHST_SEC	Click the View Attachments link on the Document History page.	View attachment and related document history.
PO History vs Document History PO Contract Version History vs Document History	CS_DOC_CHGHIST_SP	Click the View Source Version History link on the Document History page.	View source version history. **Note.** 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.
Dispatch History	CS_DOC_DSPHIST_SEC	Click the Details link for dispatched or sent documents on the Document History page.	View dispatch history.
Collaboration History	CS_DOC_COLL_HIST	Click the Details link for collaborated documents on the Document History page.	View collaboration history.

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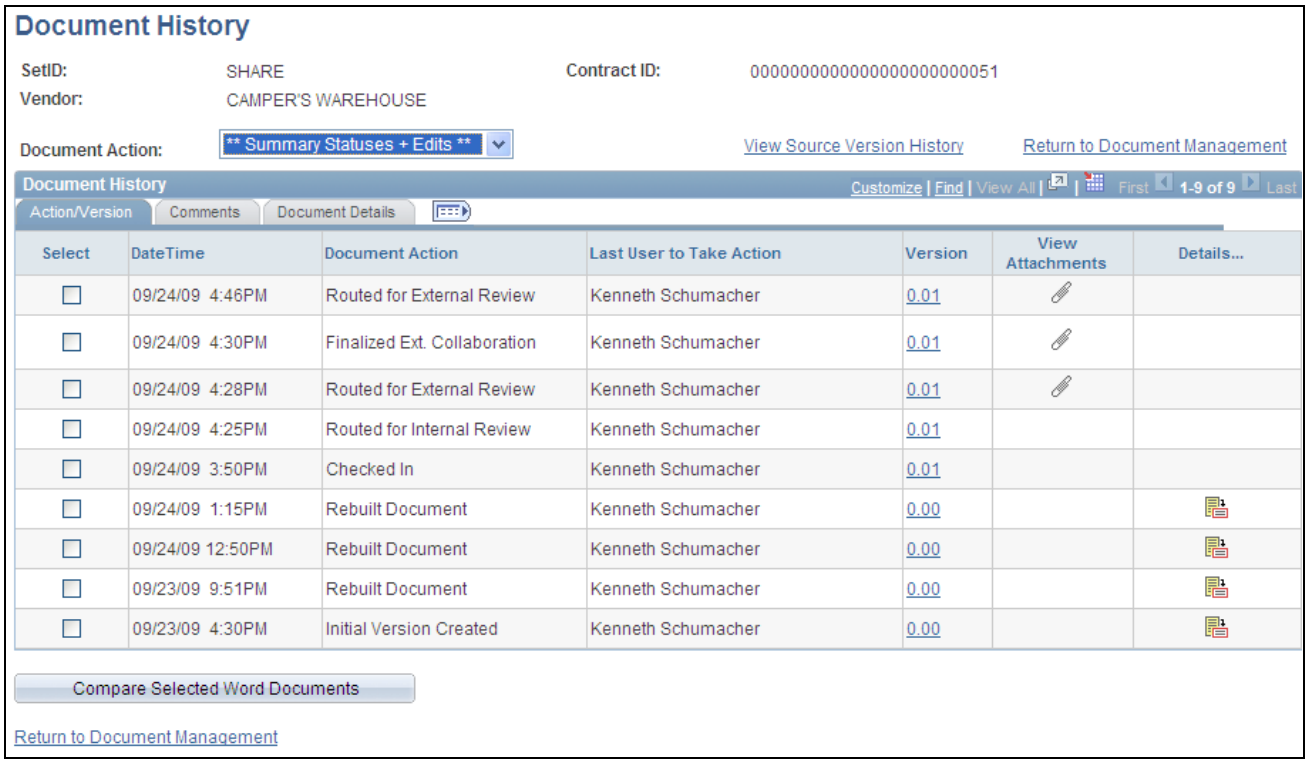
Page Name	Definition Name	Navigation	Usage
Generation History	CS_DOC_LOGHIST_SEC	Click the Details link for rebuilt and re-created documents and amendments on the Document History page.	View generation history.

Viewing Document History

Access the Document History page (click the Document Version History link on the Document Management page).



Document History

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.

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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 Chapter 13, "Managing Document Life Cycles," Viewing Source Version History, page 534.

Select 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 Compare Selected Documents button if you select one or more than two documents.

Date/Time Displays when the action took place for updated version history for the document.

Document Action Displays the action that was performed against the document.

Last User to Take Action Displays who performed the action against the document.

Version 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 tract changes to the transactional contract.

Note. 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

Note. 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.

Amendment 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.

View Attachments 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 View Executive Summary button to view the executive summary document.

Details Displays when an action has more details associated with it, such as dispatch details, collaboration details, and so on.

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View 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 View button, the system records the action for the history. The history is logged when a document is viewed internally, and externally. Select the Log View Action in History check box on the Document Type page to make this history available.

Compare Selected Documents Click to compare the two documents that you have selected. This enables you to compare any two document versions in history versus using the Compare Documents 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 Compare Selected Documents button, the system creates a temporary version that provides you a Microsoft Word document highlighting the differences between the two selected documents.

Note. 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.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Document Comparisons and Rendering, page 224.

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.

Viewing Source Version History

Access the PO History vs Document History or the PO Contract Version History vs Document History page (click the View Source Version History link on the Document History page). The page title changes based on the type of source transaction you are viewing.

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.

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You can have a change order without an amendment, have an amendment without a change order and have an amendment with a change order.

Description 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 *Initial Contract Created* value. Then, if you are using version control and create a new contract version, the field displays the *Contract Version Created* value.

Also, each time the document is updated, the system records the description, such as when the contract document was amended or dispatched.

Source Version Displays the version of the purchasing contract or change order number of the purchase order on which the corresponding description is based.

Document Version 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.

Amendment Displays the amendment number. The amendment number corresponds to the document version.

Date Displays the date on which the action in the Description field took place.

Time Value Displays the time that the action took place. The system does not record time values for purchase order and purchasing contract actions.

Viewing Attachment and Related Document History

Access the Attachment and Related Document History page (click the Document Version History link on the Document Management page, and click the View Attachments button on the Document History page).

See Chapter 13, "Managing Document Life Cycles," Viewing and Uploading Attachments and Related Documents, page 554.

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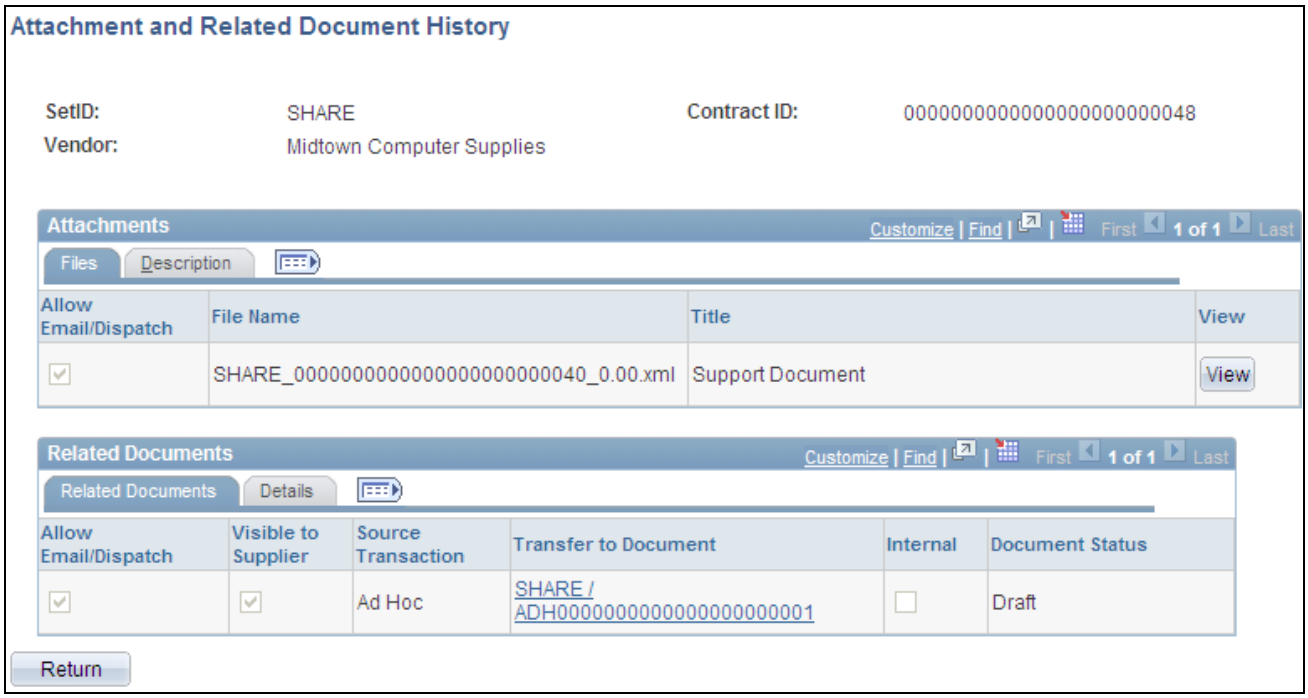

Attachment and Related Document History page

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.

Allow for Email Select to enable this attachment to be included when you send the document to contacts or when you dispatch the document.

File Name Displays the name that the system uses to upload the file and attach it to this document.

Title Displays the name that is assigned to the attachment.

View Click to open the attachment for this document. This is a read-only version of the file.

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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.

Email to Vendor	Displays whether the Email to Vendor 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.
Comment Type	Displays the type of comment that was entered for the header.
Attached File	Displays the name of the file. You assign this name when you upload the file.
View	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.

Allow for Email	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.
Source Transaction	Displays whether the document is an ad hoc or purchasing contracts document.
Ad Hoc ID and **Contract ID**	Displays the ID for the related document.
Internal	Displays whether the document is for internal use only.
Document Status	Displays the current status of the related document, regardless of the status it was at when it was added as a related document.

Viewing Dispatch History

Access the Dispatch History page (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.

See Also

Chapter 13, "Managing Document Life Cycles," Sending Documents to Internal and External Contacts, page 558

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Viewing Collaboration History

Access the Collaboration History page (click the Details link for collaborated documents on the Document History page).

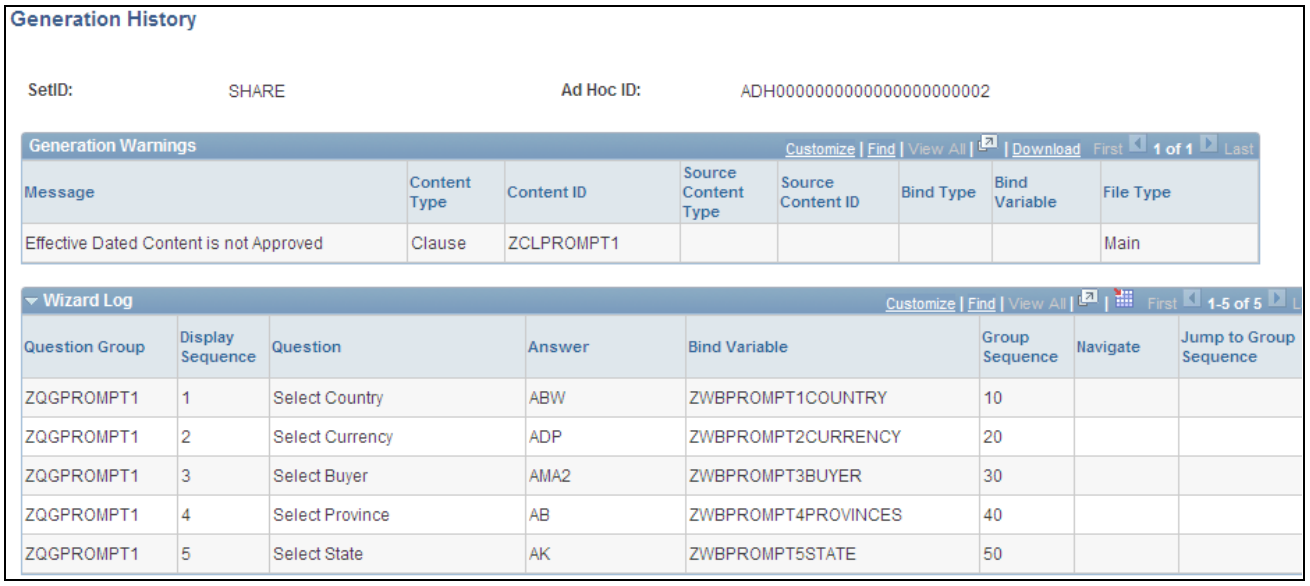
Use this page to view which collaborators have reviewed a document and when they collaborated on it.

See Also

Chapter 13, "Managing Document Life Cycles," Collaborating on Documents, page 542

Viewing Generation History

Access the Generation History page (click the Details link for rebuilt and re-created documents and amendments on the Document History page).



Generation History

SetID: SHARE Ad Hoc ID: ADH00000000000000000002

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

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		

Generation History page: Log tab (1 of 2)

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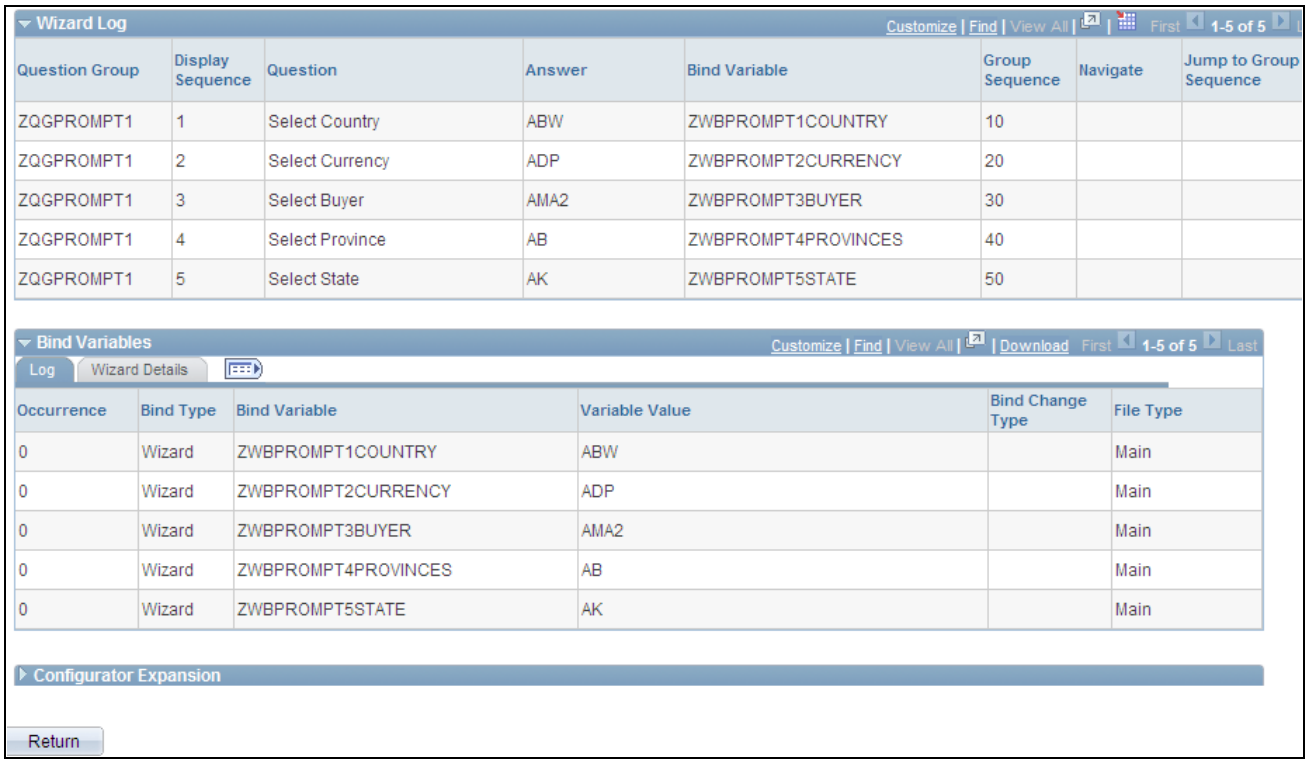

Wizard Log

Customize | Find | View All | First 1-5 of 5

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		

Bind Variables

Customize | Find | View All | Download First 1-5 of 5 Last

Log | Wizard Details

Occurrence	Bind Type	Bind Variable	Variable Value	Bind Change Type	File Type
0	Wizard	ZWBPROMPT1COUNTRY	ABW		Main
0	Wizard	ZWBPROMPT2CURRENCY	ADP		Main
0	Wizard	ZWBPROMPT3BUYER	AMA2		Main
0	Wizard	ZWBPROMPT4PROVINCES	AB		Main
0	Wizard	ZWBPROMPT5STATE	AK		Main

Configurator Expansion

Return

Generation History page: Log tab (2 of 2)

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.

See Also

Chapter 12, "Generating Microsoft Word Documents," Viewing Document Generation Logs, page 453

Setting Up Default Document Preferences

This section discusses how to define default document preferences.

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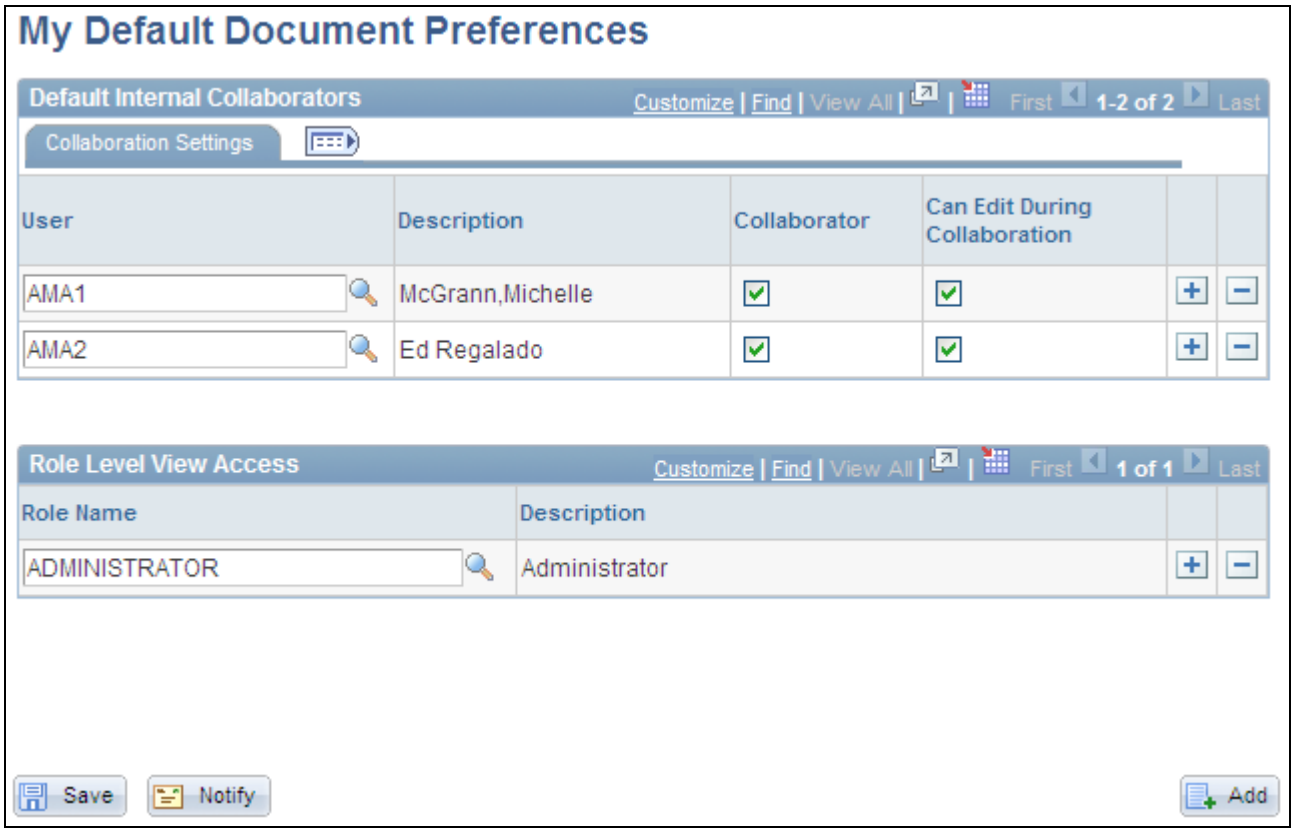
Page Used to Set Up My Default Document Preferences

Page Name	Definition Name	Navigation	Usage
My Default Document Preferences	CS_OPR_PREFERENCE	Supplier Contracts, Create Contracts and Documents, My Default Document Preferences	Define default document preferences.

Defining Default Document Preferences

Access the My Default Document Preferences page (Supplier Contracts, Create Contracts and Documents, My Default Document Preferences).



My Default Document Preferences page

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.

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User 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.

Collaborator 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.

Can Edit During Collaboration 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.

Note. If you leave both the Collaborator and the Can Edit During Collaboration 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.

Signing Settings

Select the Signing Settings tab.

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.

User Select the user ID for the user who you want to sign your documents.

Required to Sign the Document Select this check box to indicate that this internal user is required to sign any contract documents created by the current user ID.

Visible Signer 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.

Sign Order 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.

Signing Title Enter a job title that describes the collaborator's position related to the contract document.

See Chapter 13, "Managing Document Life Cycles," Signing Documents Using Digital Signatures, page 572.

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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.

See Also

Chapter 13, "Managing Document Life Cycles," Understanding Document Collaboration, page 542

Chapter 13, "Managing Document Life Cycles," Understanding How to Use Digital Signatures, page 572

Collaborating on Documents

This section provides an overview of document collaboration and discusses how to:

- Define and review collaborator information.
- Route documents for internal collaboration.
- Route documents for external collaboration.
- Modify collaboration.
- Cancel collaboration.
- Respond to collaboration requests.
- Finalize internal collaboration.
- Finalize external collaboration.

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.

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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.

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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 or deny 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 Vendor 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.

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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.

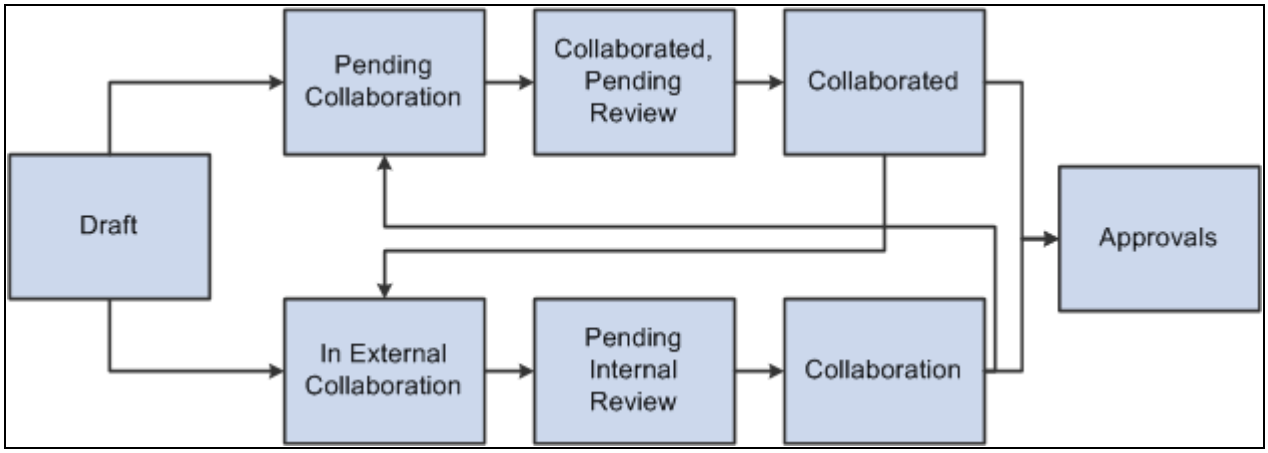
- In External Collaboration

  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 flowchart 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:



External collaboration statuses

The next flowchart illustrates system processes that take place when a document is sent for external collaboration. The system uses email and worklist notifications to send and receive notices and stages files while the document is in review:

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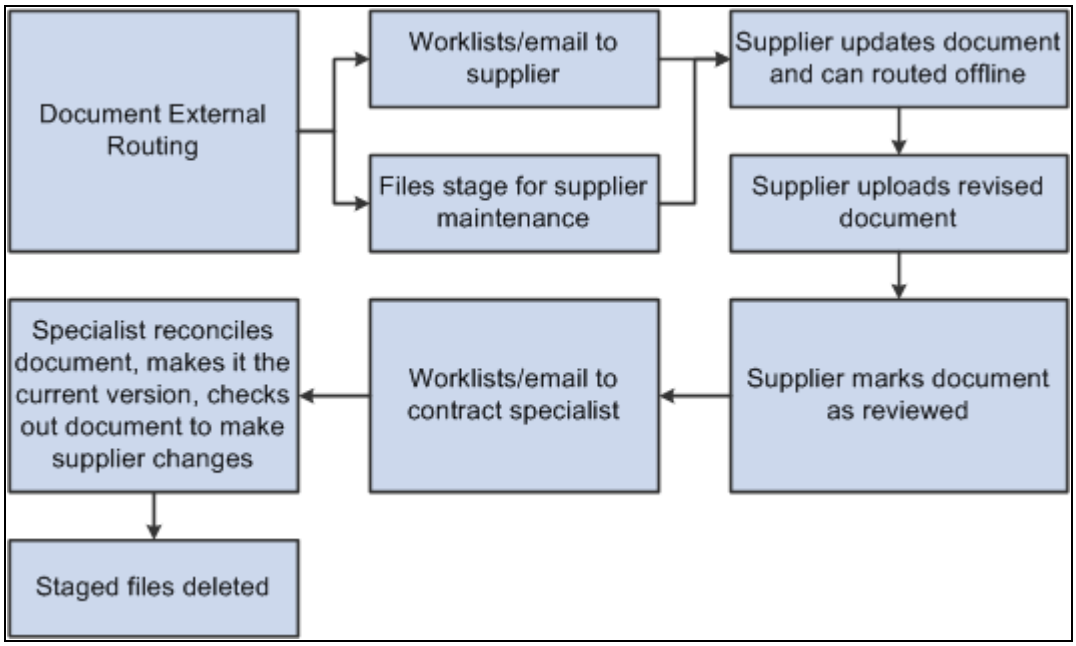

External Collaboration processing flow

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.

See Also

Chapter 13, "Managing Document Life Cycles," Viewing and Editing Documents, page 522

Pages Used to Collaborate on Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Internal Contacts/Collaborators	CS_DOC_COLLAB	Supplier Contracts, Create Contracts and Documents, Document Management Click the Collaboration Details link on the Document Management page.	Route documents for internal collaboration.
Route for External Collaboration	CS_DOC_COLL_EXT_SP	Click the Route Externally button on the Document Management page.	Route documents for external collaboration.

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Page Name	Definition Name	Navigation	Usage
Document Management	CS_DOC_MAINT	Supplier Contracts, Create Contracts and Documents, Document Management	Modify collaboration. Cancel collaboration. Respond to collaboration requests. Finalize collaboration.

Routing Documents for Internal Collaboration

Access the Internal Contacts/Collaborators page (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.

Ad Hoc ID 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.

Contract ID 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.

PO ID (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.

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Vendor ID	Displays the vendor to which the contract applies. This field appears when you select a document that is linked to a transactional purchasing contract.
User	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.
Collaborator	Select to indicate that this user is a collaborator for this document. When the document is routed for collaboration, the system notifies this user.
Can Edit During Collaboration	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.
Collaboration Status	Displays the status of the collaborator's response to the document. When you initially send the collaboration request, the status is *Collaboration Pending.* After the collaborator marks the request as reviewed, the status changes to *Collaboration Complete.*
Date Time	Displays when the collaborator performed a collaboration task against the document.
Collaboration Instructions	Enter comments or instructions concerning the collaboration of this document. After completing the instructions, click the Save button. The system removes the instructions and appends them in the Collaboration Comments section.
Collaboration Comments	Displays comments that the administrator and collaborators have entered. You can expand the field.
Route Internally	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.
Return to Document Management	Click to return to the Document Management page, where you can perform other tasks that are related to the document.

Routing Documents for External Collaboration

Access the Route for External Collaboration page (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. .

User	Displays external users who have been defined on the External Contacts List page.

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Allow Document View Access	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.
Primary Doc Owner (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.
Owner for this Collaboration(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 Can Edit During Collaboration check box to provide edit authority to the collaborator.
Can Edit During Collaboration	Indicates whether the corresponding external user can edit the contract document.
Collaborate on Main File	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.
Collaborate on Amendment File	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.
Route Externally	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

Access the Document Management page (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 users without taking the document out of the collaboration process.

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Canceling Collaboration

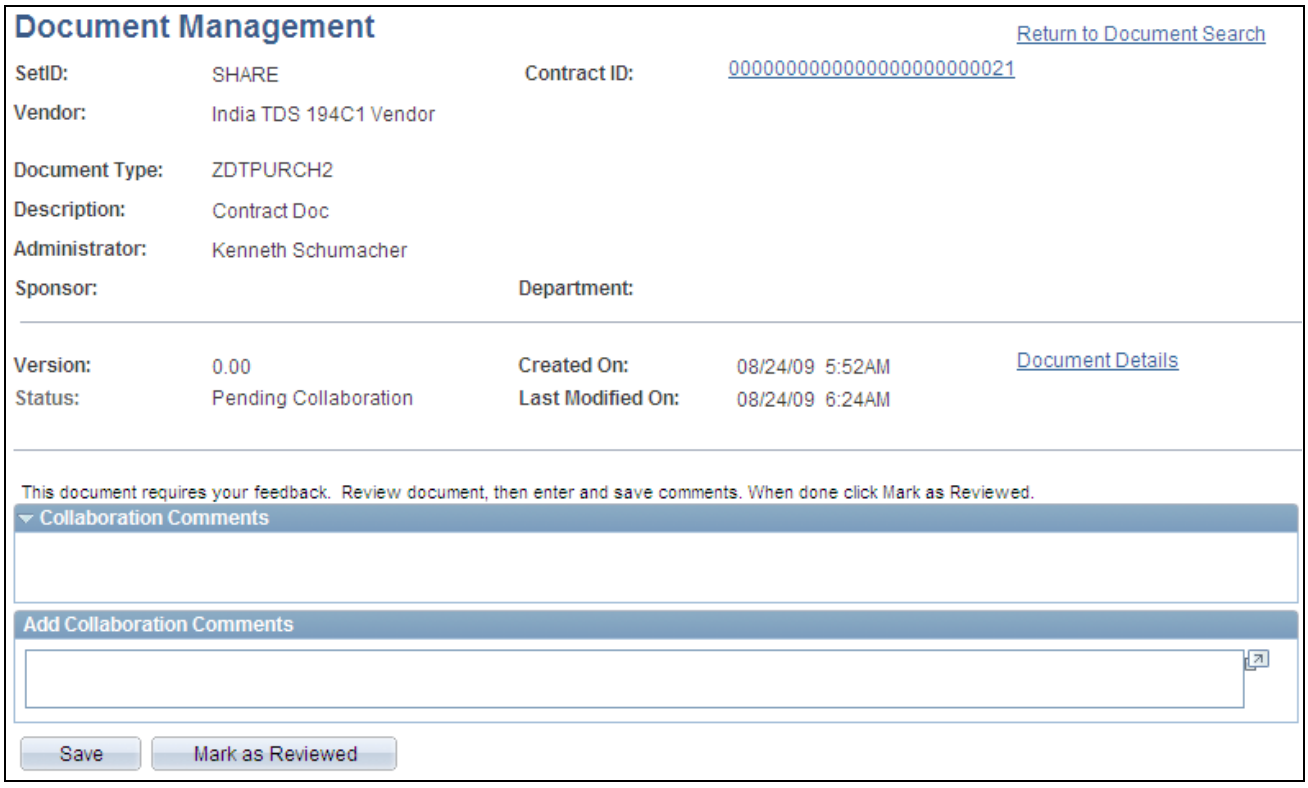
Access the Document Management page (Supplier Contracts, Create Contracts and Documents, Document Management).

After a document has been sent for collaboration, you can stop the collaboration. Click 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

Access the Document Management page (Supplier Contracts, Create Contracts and Documents, Document Management).



Document Management page (1 of 2)

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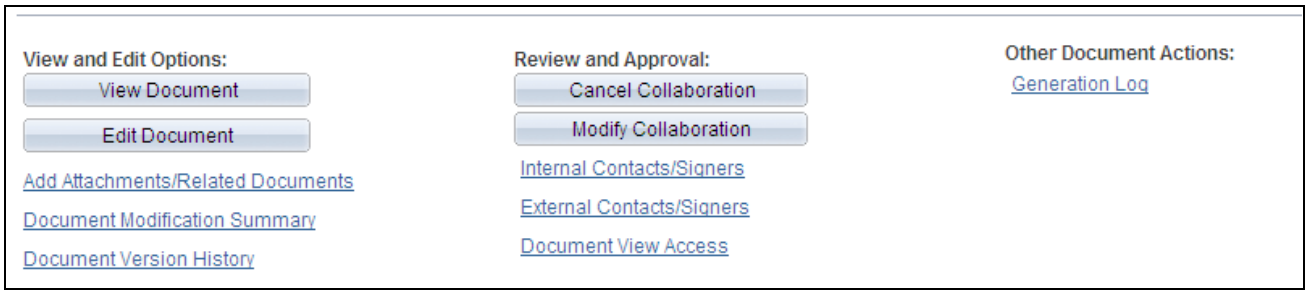

Document Management page (2 of 2)

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.

Add Collaboration Comments Enter any comments that you might have about the document, such as changes that you made if you edited the document.

Save 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.

Mark as Reviewed 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

Access the Document Management page (Supplier Contracts, Create Contracts and Documents, Document Management).

Use this page after reviewing and accepting or rejecting any changes that collaborators made to the 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 if required.

Finalizing External Collaboration

Access the Document Management page (Supplier Contracts, Create Contracts and Documents, Document Management).

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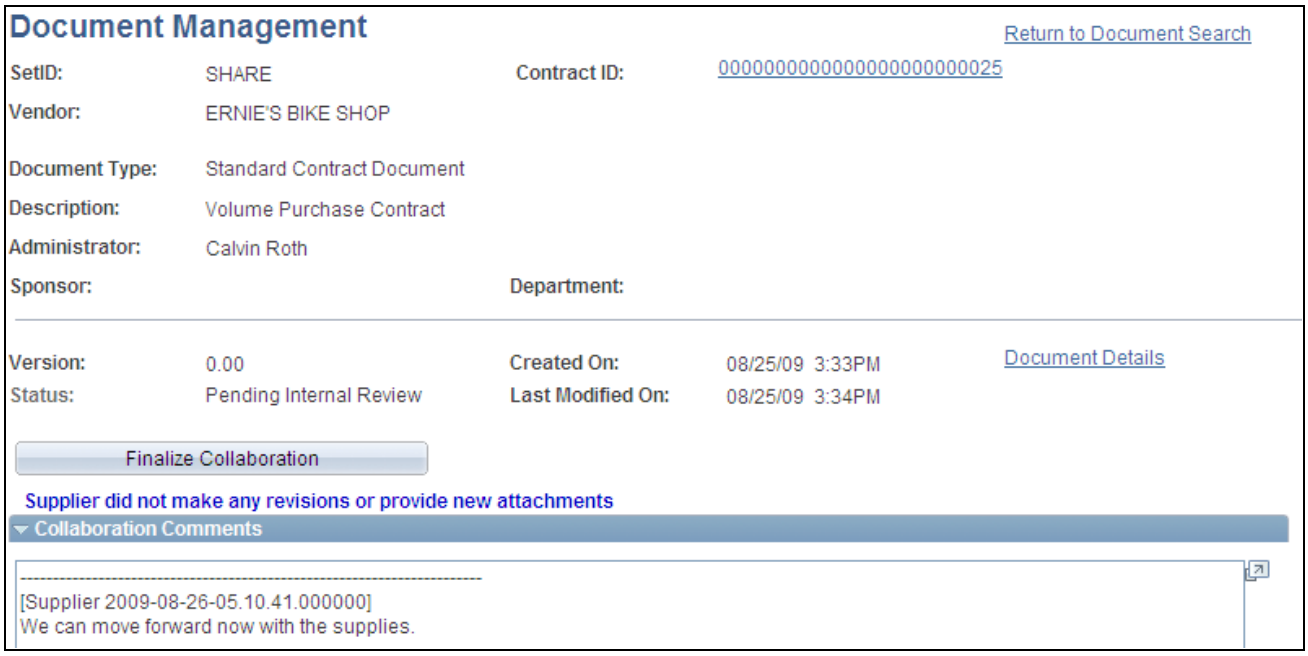
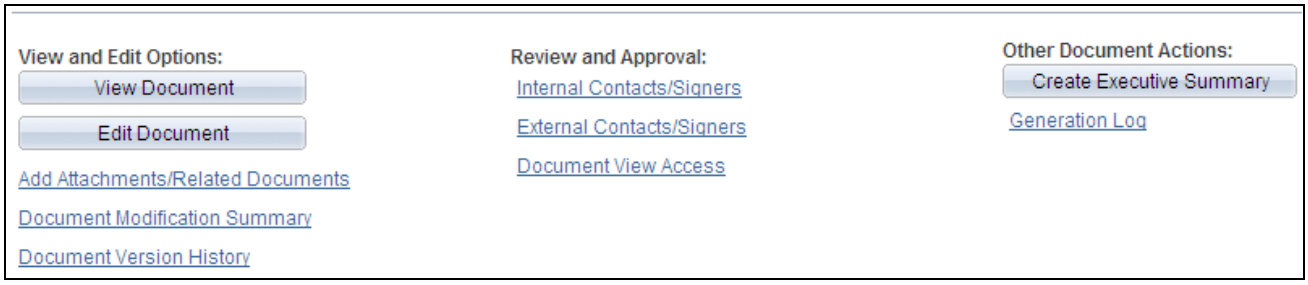


Document Management for finalizing external reviews (1 of 2)



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.

Accept Supplier's Revisions and Finalize

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 completer 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.

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.

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Finalize Collaboration 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 Edit or Check In buttons at the bottom of the page. After they have made the changes manually, they can click this button to complete the collaboration process. This button is available for the contract administrator after supply-side users complete their collaboration.

Note. 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.

View Revised Document 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.

Compare Revised Documents 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

This section discusses viewing document changes.

Page Used to View Document Modification Summaries

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Modification Summary	CS_DOC_MODS_SUMM	Supplier Contracts, Create Contracts and Documents, Document Management Click the Document Modification Summary link on the Document Management page.	View document changes.

Viewing Document Changes

Access the Document Modification Summary page (click the Document Modification Summary link on the Document Management page).

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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.

See Chapter 17, "Approving Documents and Document Components," page 649.

Action Displays the type of action that is performed on the contract clause. The system displays clauses against which these actions are performed:

- Deleted
- Added
- Changed

Content ID Displays the content against which the system performed an action. If a clause is not associated with the update, the field is empty.

Numbered Displays the number of the content that has been updated. The number is applied when numbering is in the Microsoft Word document.

Last Checked In Displays the date and time that the document content was last checked in.

Last Created or Executed Displays the last time that the content was created or executed in a document.

Viewing and Uploading Attachments and Related Documents

This section discusses how to view and upload attachments and related documents.

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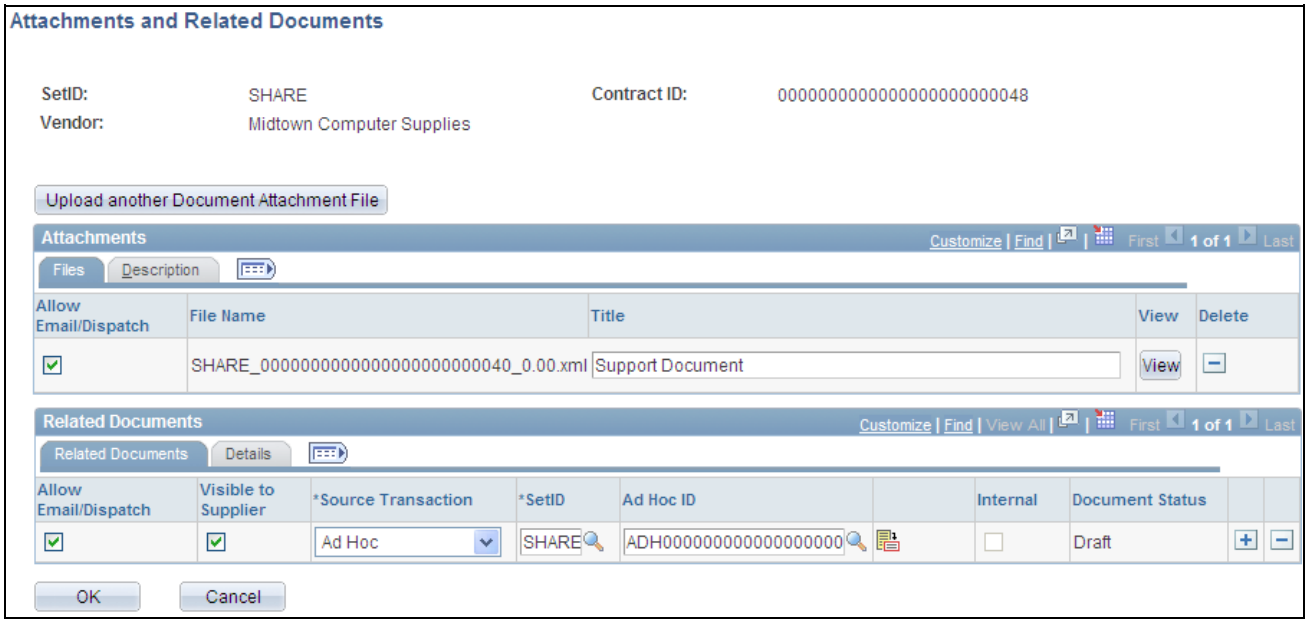
Page Used to View and Upload Attachments and Related Documents

Page Name	Definition Name	Navigation	Usage
Attachments and Related Documents page	CS_DOC_ATTACH_SEC	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.	View and upload attachments and related documents.

Viewing and Uploading Attachments and Related Documents

Access the Attachments and Related Documents page (click the Add Attachment/Related Documents link or the Modify Attachments/Related Documents link on the Document Management page.



Attachments and Related Documents page

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.

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 vendors 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.

Upload a Document Attachment FileUpload another Document Attachment File 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.

Allow Email Dispatch 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 Attachments check box on the Send to Contacts and Dispatch pages. Then you can determine whether to send the attachment.

If you do not select this check box, the system disables the Attachments check box for sending and dispatching and the attachment cannot be included with the document.

File Name 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.

Title Enter a description of the attachment. The system includes this description in history records. You can enter up to 254 characters in the field.

View Click to open a read-only copy of the selected attachment.

Delete Click to remove an attachment from the document. The attachment is removed immediately, but you must click OK to save the page and the deletions.

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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.

Email to Vendor Appears if the Email to Vendor 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.

Comment Type Displays the comment type from Purchasing.

Attached File File name of the attachment that was assigned in Purchasing.

View 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.

Allow Email Dispatch 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.

Note. You cannot include a related document for email dispatch when the corresponding document has it's own dispatch step. You can include only documents that do not have their own dispatch step in the email.

Visible to Supplier Select to indicate that this related document should be to external users.

Source Transaction 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 Set ID,Business Unit ID, Contract ID, and PO Number fields.

Set ID Select the setID from which to select an ad hoc or purchasing contract document.

Business Unit ID Select the business unit from which to select a purchase order contract document. This field is available for purchase order contract documents.

Ad Hoc ID Select the related ad hoc document.

Contract ID Select the related ad hoc document.

PO Number (purchase order number) Select the related ad hoc document.

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Transfer to Document (purchase order number)	Select to access the related document where you can view and maintain the document details.
Internal	Displays whether the document is for internal use only. This value is based on the Internal Document check box on the Document Type page. If the check box is selected, a check mark appears in the Internal field.
Document Status	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

This section provides an overview of external contacts and discusses how to:

- Maintain external contact lists.
- 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 in Microsoft WordML. Suppliers must use Microsoft Word 2003 or a later version to make edits directly in the version of the contract that is sent to them. If the external contract does not have Microsoft Word 2003, 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 speadsheets or Adobe documents in their native format and the contact can open and review the attachments.

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 2003 version deletes custom tags. This causes the document and clauses to be unrecognizable in the PeopleSoft system.

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See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Document Comparisons and Rendering, page 224

Appendix A, "Microsoft Word Integration with Supplier Contract Management," Understanding Microsoft Word Integration with Supplier Contract Management, page 701

Pages Used to Send Documents to Internal and External Contacts

Page Name	*Definition Name*	*Navigation*	*Usage*
Internal Contacts List	CS_DOC_INT_CONT_SP	Supplier Contracts, Create Contracts and Documents, Document Management Click the Internal Contacts List link on the Document Management page.	Maintain internal contacts.
External Contacts	CS_CONTACT_SEC	Click the External Contacts List link on the Document Management page.	Maintain external contacts.
Send to Contacts	CS_DOC_DSPTCH_SEC	Click the Send to Contacts button on the Document Management page.	Send documents to contacts.

Maintaining Internal Contact Lists

Access the Internal Contacts List page (Supplier Contracts, Create Contracts and Documents, Document Management, and click the Internal Contacts List link on the Document Management page).

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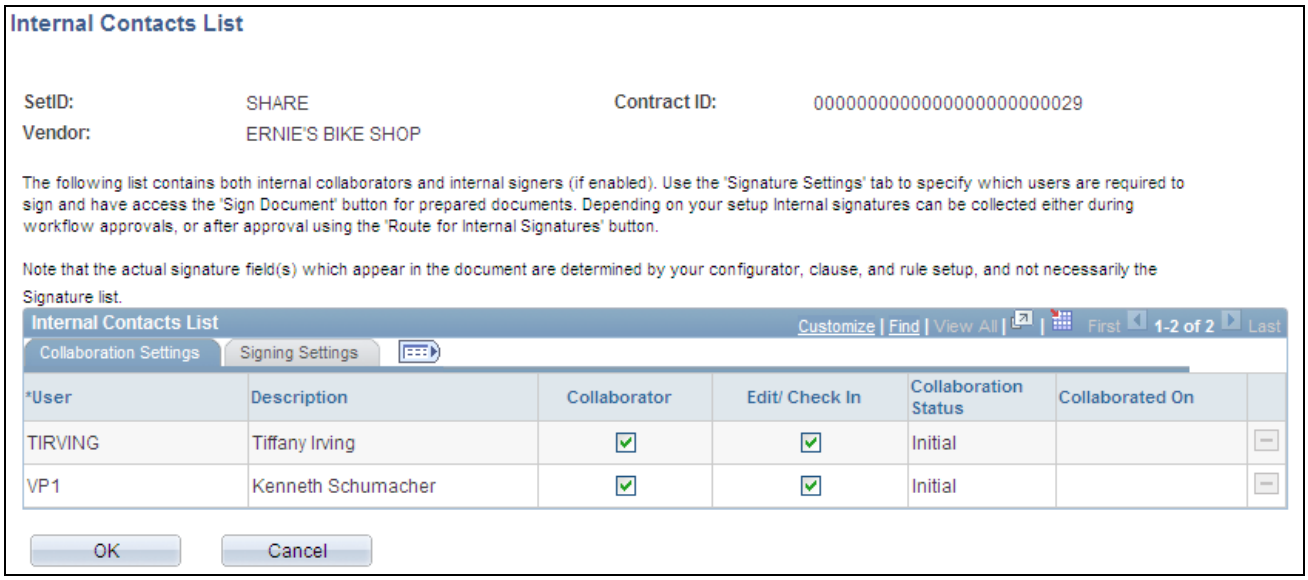

Internal Contacts List page

User Select users that you want to define as collaborators for this document.

Collaborator Select to indicate that the user is a collaborator for this documents. During document reviews, collaborators can view the document and make comments; however, unless they have been authorized, they cannot edit the document.

Edit/Check In 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. If you leave both the Collaborator and the Can Edit During Collaboration check boxes deselecteded, you can associate these users as interested parties to a specific contract for read-only access any time during the contract's life cycle.

Collaboration Status Displays the current internal collaboration status for this document. Internal collaboration statues 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 Collaborated On field.

Collaborated On 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 check box is selected on the Installation Options page.

Required to Sign the Document Select this check box to indicate that this internal user is required to sign any contract documents created by the current user ID.

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Visible Signer	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.
Sign Order	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.
Signing Title	Enter a job title that describes the collaborator's position related to the contract document.
Signed Status	Displays the status related to whether a signer has signed a document. Values include: *Initial* *Signed* *Pending Signature* *Replaced by Alternate* *Signed by Proxy* *Marked as signed* *Declined*
Signed DTTM	Displays when the document was signed.
Recycle Sign Status to Initial	Click to reset the signed status to Initial. The system updates the document's signed status for this user to Initial. The user has to sign the document again.
Mark as Signed	Click to set the current row to a signed status of Marked as Signed. Administrators can use this button to indicate that particular users have signed the document offline.

Maintaining External Contact Lists

Access the External Contacts page (Supplier Contracts, Create Contracts and Documents, Document Management , and click the External Contacts List link on the Document Management page).

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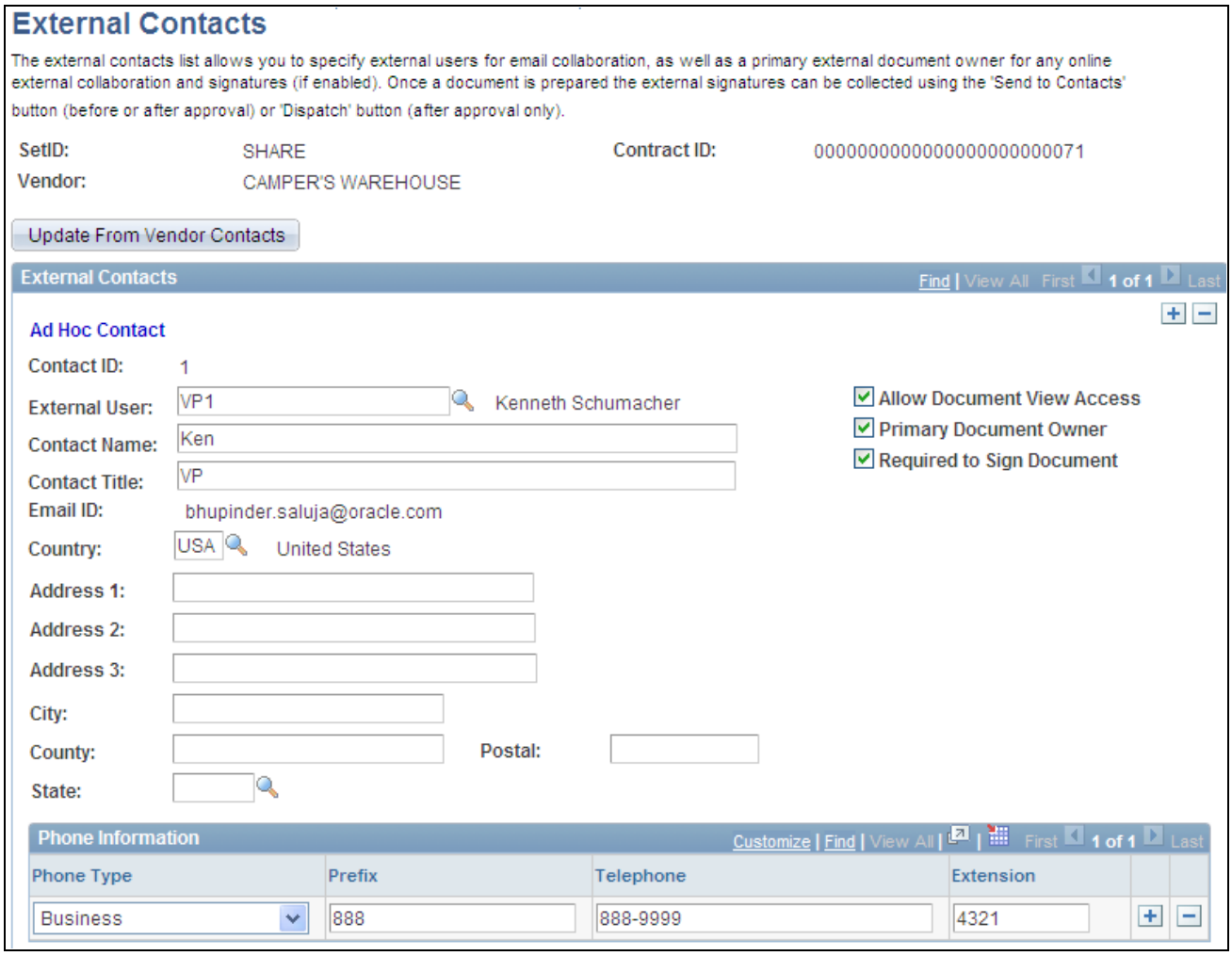

External Contacts page

External contacts are those who you want to receive documents when you use the Send to Contacts page. Each document has its own external contact list. After you complete this page, the external contacts become the default values for when you send the document. In addition, the information that you maintain 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.

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.

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 vendor location for that contract. It also includes an Update From Vendor Contacts button that enables you to insert a vendor contact who has been identified as a contract collaborator using the Contacts page in the Vendor 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 vendor contacts, a contact type of *Contract Collaborator* is available on the Contacts page. To access the page, select Vendors, Vendor Information, Add/Update, Vendor, Contact.

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Contact ID	Displays the system-assigned number that uniquely identifies this external contact. As you add contacts, the number is increased by one.
Allow Document View Access	Select to provide this external user with view access to documents associated with this contract. You use the Document View Access link on the Document Management page to authorize internal users to view documents.
Primary Document Owner	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.
Required to Sign Document	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.

Sending Documents to Contacts

Access the Send to Contacts page (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.

See Also

Chapter 13, "Managing Document Life Cycles," Dispatching Documents, page 564

Granting Document View Access

This section discusses how to grant view access.

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Page Used to Grant Document View Access

Page Name	Definition Name	Navigation	Usage
Document Access	CS_DOC_ROLE_ACCESS	Supplier Contracts, Create Contracts and Documents, Document Management Click the Send to Contacts button on the Document Management page.	Grant view access.

Granting View Access

Access the Document Access page (Supplier Contracts, Create Contracts and Documents, Document Management, and 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

This section provides an overview of document dispatch and discusses how to:

- Dispatch documents.
- Reset documents to dispatched.

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.

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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.

Pages Used to Dispatch Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Dispatch	CS_DOC_DSPTCH_SEC	Supplier Contracts, Create Contracts and Documents, Document Management Click the Dispatch button on the Document Management page.	Dispatch documents to contacts.
Document Management	CS_DOC_MAINT	Supplier Contracts, Create Contracts and Documents, Document Management	Reset documents to dispatched.

Dispatching Documents

Access the Dispatch page (click the Dispatch button on the Document Management page).

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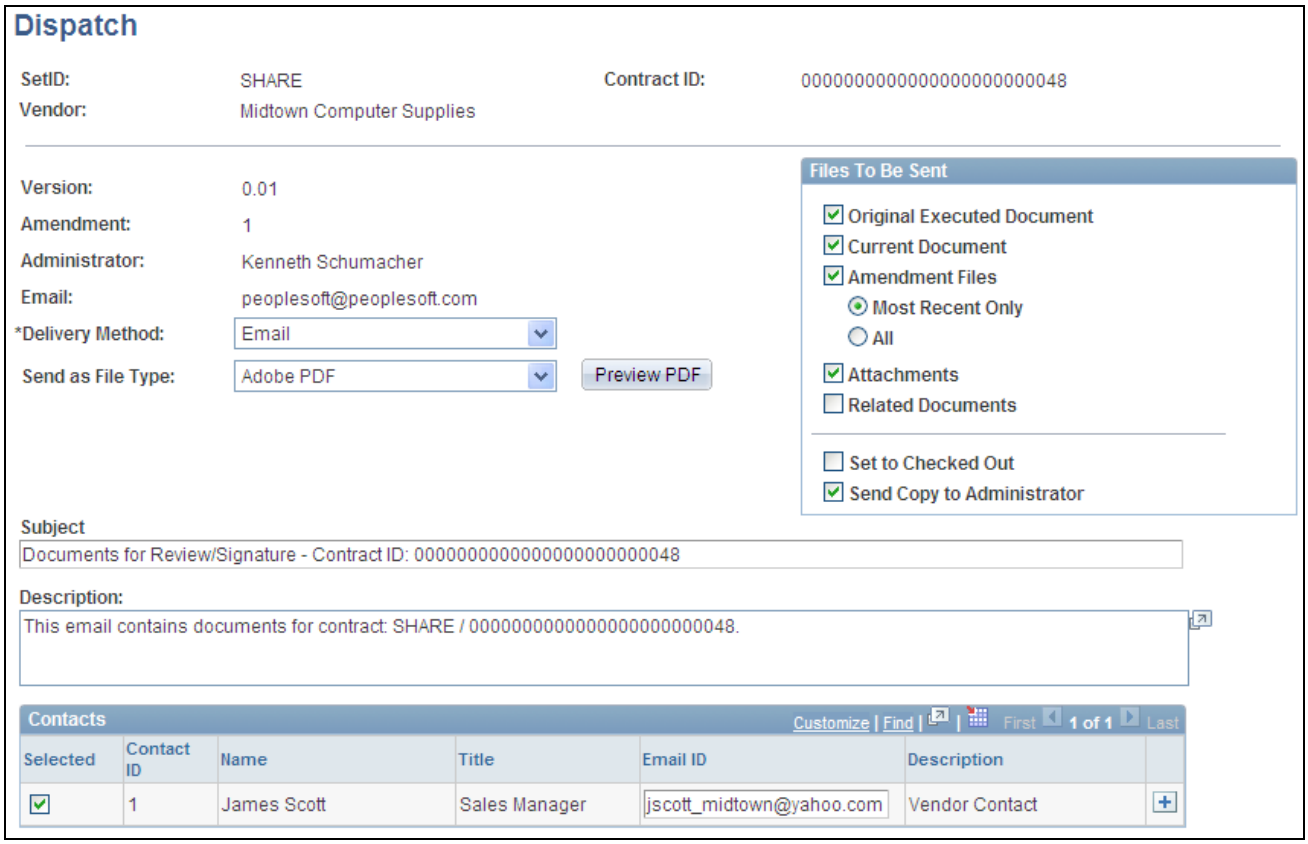
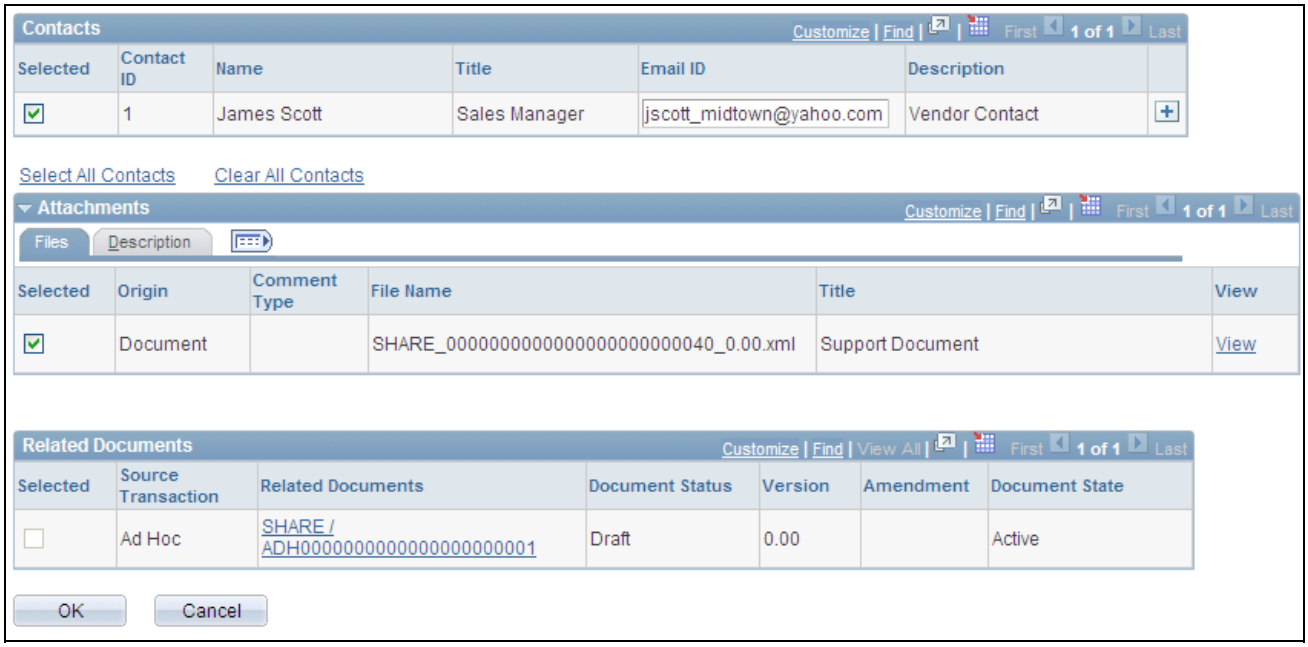


Dispatch page (1 of 2)



Dispatch page (1 of 2)

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.

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Vendor Displays the vendor on the purchasing contract.

Version Displays the version of the document.

Amendment Displays the number of amendments belonging to this purchasing contract or ad hoc document.

Administrator Displays the administrator.

Administrator Email ID Displays the email address for the administrator.

Delivery Method Select to determine how to send the document to the contact. The contact can be an external or internal contact. Methods are:

Email: Select to indicate that the document and notification will be sent by email. When you select email, the system populates the Description field with the setID and document description and highlights the Files to Be Sent grid. If you select this option, you must enter at least one email address.

Manual: 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.

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 *Manual,* the system disables the contacts list and the Files to Be Sent field. You can indicate that the document has been checked out for their review, but you cannot send a copy to the administrator.

Email and Online Signatures: 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.

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Send as File Type The file type is the application format that you use as the basis to dispatch a document.

Values include:

*Adobe PDF Format:*Select to send the file in an Adobe Acrobat PDF format.

See Chapter 13, "Managing Document Life Cycles," Understanding How to Use Digital Signatures, page 572.

Word 2003 XML: Select to send the document by email in a Microsoft Word .xml format.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Installing and Configuring Microsoft Word and Acrobat Components on Workstations, page 212.

Word Document: Select to send the document by email in a Microsoft Word .doc format. This is for use with contacts who might not have Microsoft Word 2003 available, but still want to view the document. Any edits will have to be manually entered into the Microsoft Word 2003 .xml file. This check box appears when you select to render documents in a .doc version using installation options.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding How to Set Up Digital Signatures, page 215.

Preview PDF Click to preview the document in a PDF format. The system launches a new page and displays the document with any edits.

See Chapter 13, "Managing Document Life Cycles," Preparing Documents for Signature, page 581.

Subject Displays a system-generated description of the document to be reviewed.

Description 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.

Original Executed Document 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.

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Current Document 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.

Amendment Files 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.

Most Recent Only Select to send only the most recent amendment file with the email. The system does not send any previous amendment files.

All Select to send all amendment files with this email. This includes all amendment files for all past amendment cycles.

Attachments 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 External 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 Attachment grid so that you can select individual attachments.

Related Documents 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: *Draft, Complete Statuses Only* and *Draft, Approve Statuses Only.*

Set to Checked Out 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: File locked for external review. This option prevents other users from editing the document while the contacts are reviewing it. This field is available for email and manual notifications.

Note. 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.

Send Copy to Administrator 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.

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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.

Selected	Select these check boxes to mark contacts to whom you are sending the routing. You must select one contact. You can use the Select All and Clear All links to select multiple contacts.
Contact ID	Displays the system-defined sequence number for the contact.
Name	Displays the person to whom the email will be sent containing the dispatched document and any attachments and related documents that you select.
Title	Displays the position that is defined for contact.
Email ID	Displays the email address for the contact.
Description	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 Vendor component's Contacts page. This is applicable only if the document is tied to a purchasing contract transaction. The description values are *Ad Hod Contact* and *Vendor Contact.*

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.

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See Also

Chapter 13, "Managing Document Life Cycles," Viewing and Uploading Attachments and Related Documents, page 554

Resetting Documents to Dispatched

Access the Document Management page (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.

See Also

Chapter 13, "Managing Document Life Cycles," Dispatching Documents, page 564

Approving Documents

This section discusses how to approve a document.

Page Used to Approve Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Management	CS_DOC_MAINT	Supplier Contracts, Create Contracts and Documents, Document Management	Approve a document.

Approving a Document

Access the Document Management page (Supplier Contracts, Create Contracts and Documents, Document Management).

Click the Worklist link, filter the worklist using *Approval Routing*, and click the link for the document that you want to approve or deny. Using this page, you can perform a number of tasks that relate to document review, approval, and denial. These tasks are processed through approvals using approval framework.

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See Also

Chapter 16, "Configuring PeopleSoft Approval Framework for Use with Supplier Contract Management," page 635

Chapter 17, "Approving Documents and Document Components," page 649

Signing Documents Using Digital Signatures

This section provides an overview of digital signatures and discusses how to:

- Prepare documents for signature.
- Routing documents for internal signatures.
- Sign internal documents using digital signatures.

Understanding How to Use 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. PeopleSoft Supplier Contract Management supports the ability to lock down 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.

Note. Preparing your system for digital signing and setting up digital signatures is described in the Setting Up PeopleSoft Supplier Contract Management chapter.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up Digital Signatures, page 215.

Note. The requirement for using the .docx format is that all signers, both internal users and external suppliers, must use Microsoft Word 2007. 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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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. To insert signature blocks for Adobe PDF files you create postscript files that are inserted as image objects into the Microsoft Word version of the signature clauses. Then, you can use the clause directly on the configurators or use rules to insert alternative signature clauses based on the organization's needs.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up Digital Signatures, page 215.

The next set of steps describes the process for using digital signatures with Adobe Acrobat. The processes for Adobe PDF signatures and Microsoft Word 2007 are similar. However, the features within each process regarding signing a document may be different as specified by the software vendors. 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 Microsoft Word 2007 and .docx format for signatures means each signer must be using Microsoft Word 2007 to add a signature. When using Microsoft Word 2007, the .docx format is used only for signature file and purpose. The .xml format is always the file format for Microsoft Word 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.

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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 so that others having only the Adobe Reader can sign the document. 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 Acrobat Adobe PDF format, launch Adobe Acrobat 8 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 files and prevents the system from opening the PDF in a browser format.

   .

   The next examples illustrates how a converted PDF file appears with its signature blocks:

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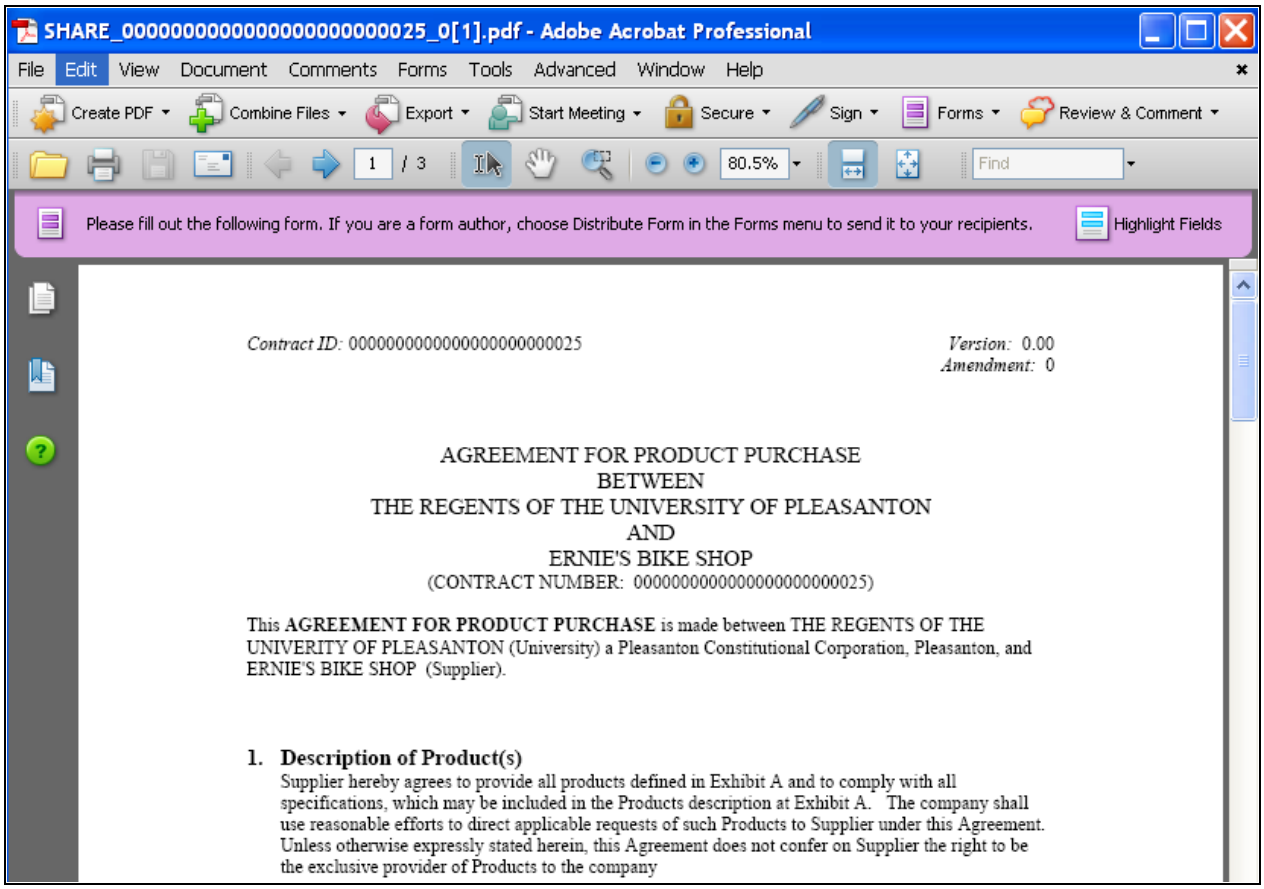
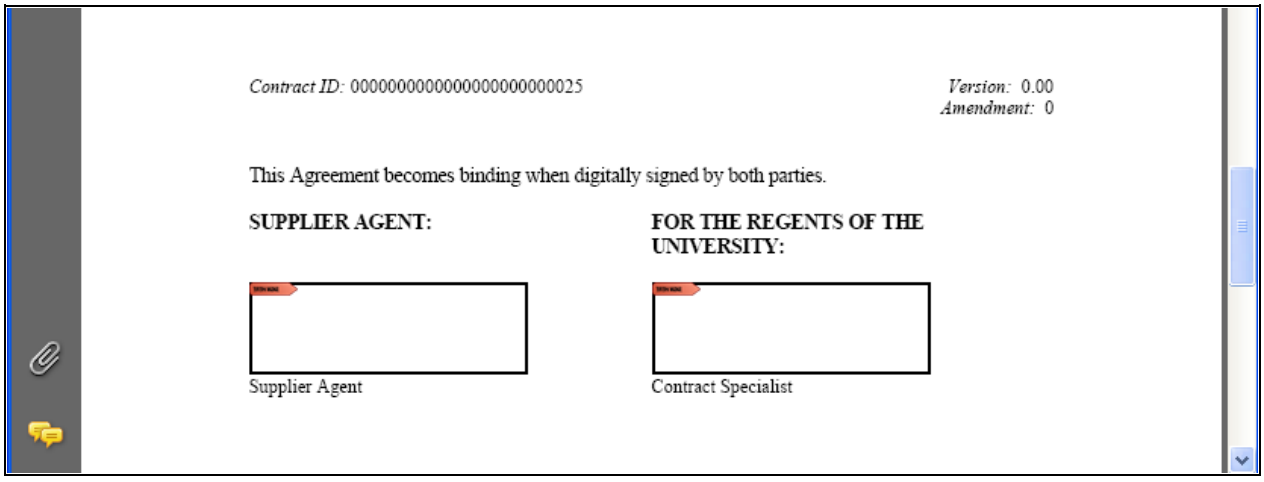


Adobe PDF document for signature (1 of 2)



Adobe PDF document for signature (2 of 2)

The signature blocks appear at the bottom of the page. The system applies the visible digital signature to these blocks when the appropriate users sign the document. You create the signature blocks by creating a clause with the information and the imbedded images. Then you use the clause in the document configurator to build the document.

4. Save the file.

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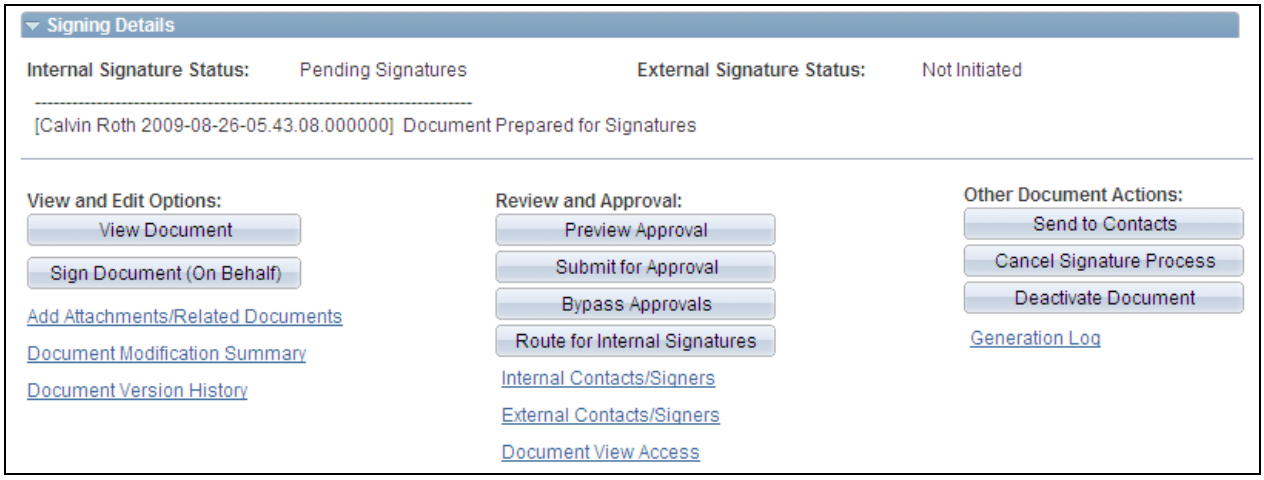
5. Click the Upload Prepared Document button on the Document Management page.

   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:



Document Management page with signing details

   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 Chapter 13, "Managing Document Life Cycles," Routing Documents for Internal Signatures, page 582.

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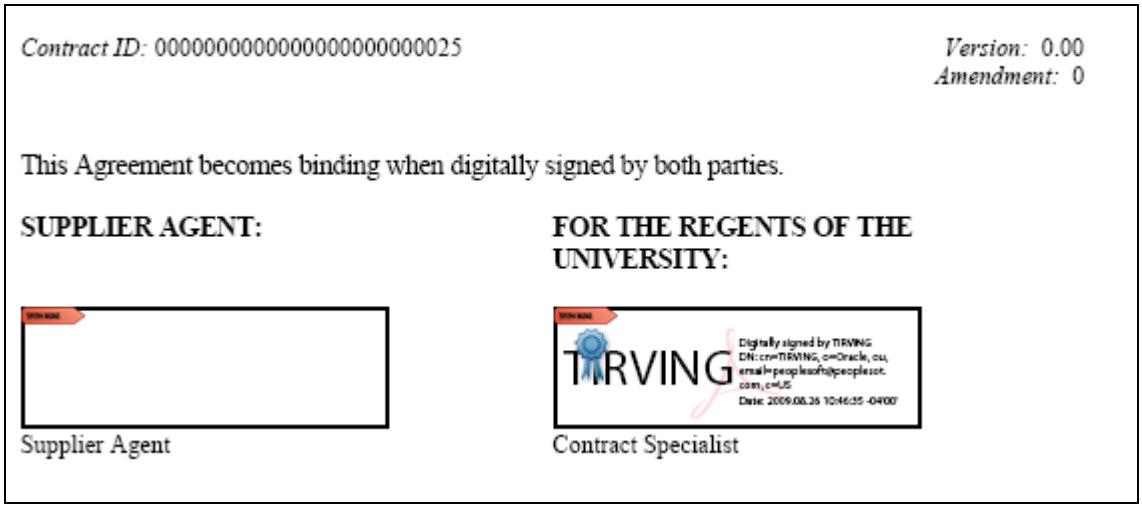
7. The internal signer accesses the document and applies the digital ID.



Adobe PDF signature

For more information about signing an external document, see the Signing Internal Documents Using Digital Signatures later in this section.

See Chapter 13, "Managing Document Life Cycles," Signing Internal Documents Using Digital Signatures, page 583.

8. When the last internal signer signs the document, the system updates the internal signature status to Signed as shown in this example:

Document Management page with internal signature completed

Depending on the signature flow, the contact administrator can, for example, send the document for internal approvals or send it for internals signatures before sending it to external users.

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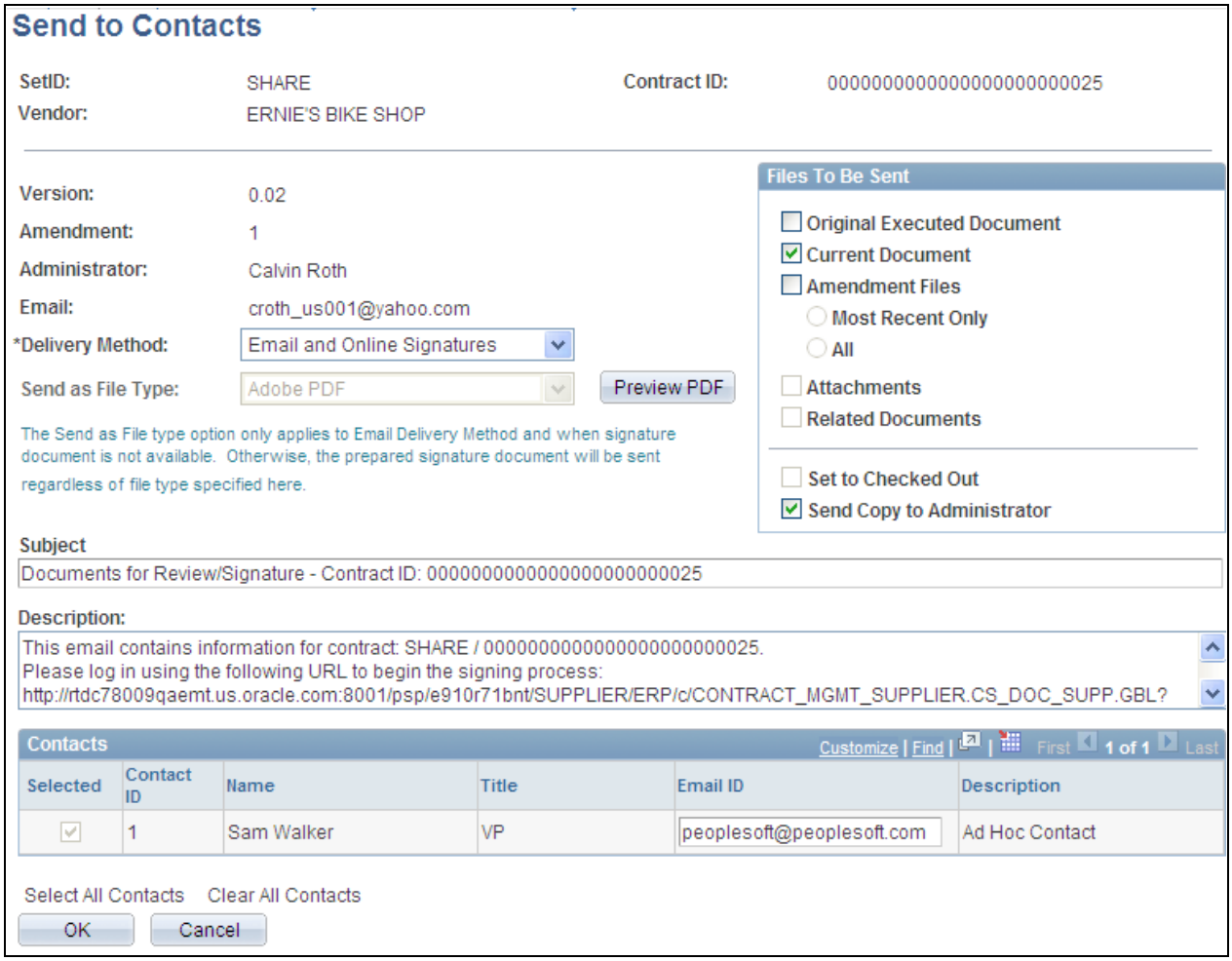
9. The contract administrator routes the document to external signers by clicking the Send to Contacts or Dispatchbutton, depending on where in the life cycle they wish to gather external signatures. .

10. 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.



Send to Contacts page with URL for external users

When suppliers receive the email, they can link back to the supplier portal and sign the document.

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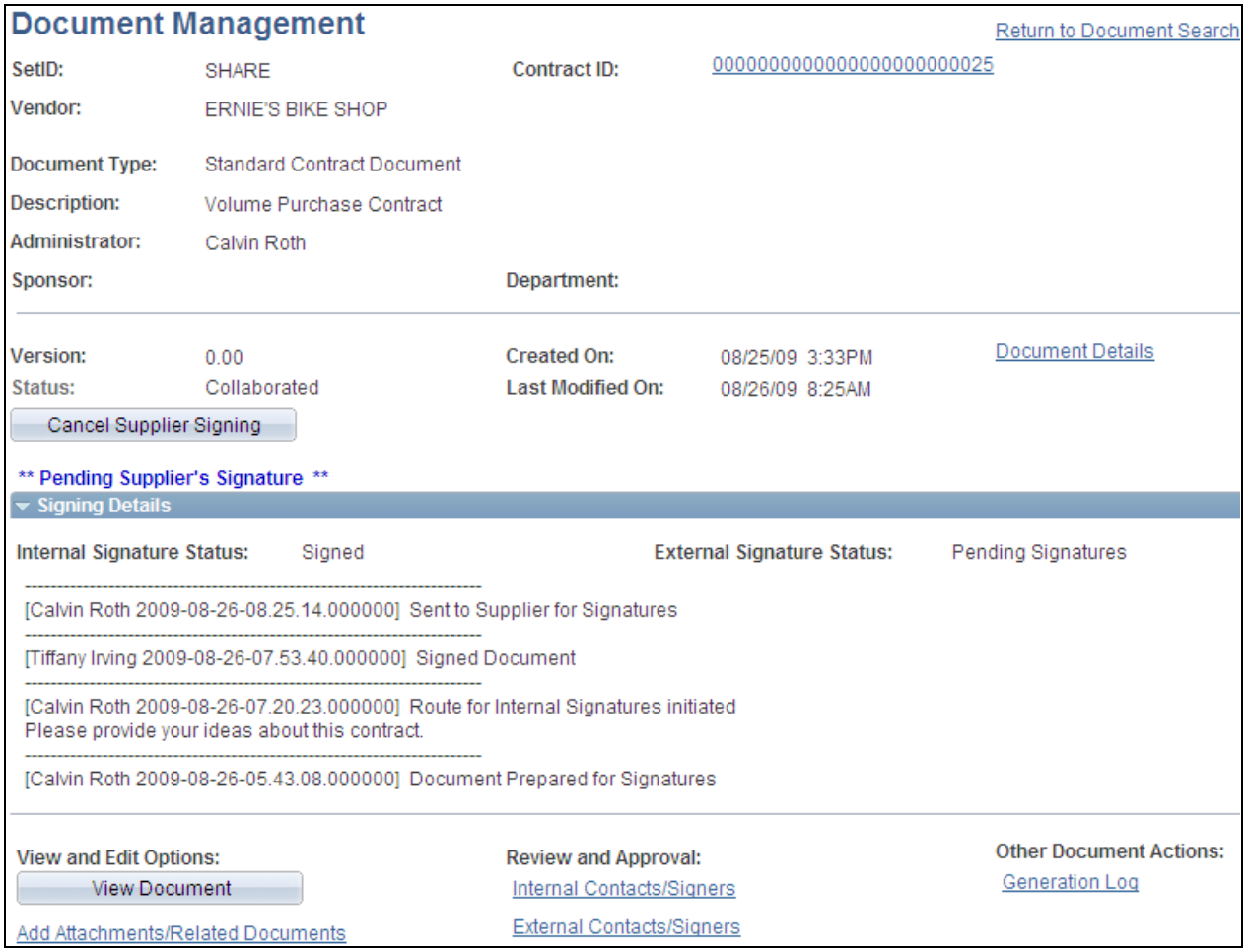
11. Click OK.

The system updates the Document Management page with the new signature process update as appears in this example:



Document Management page with signing updates

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 Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Signing External Documents, page 144.

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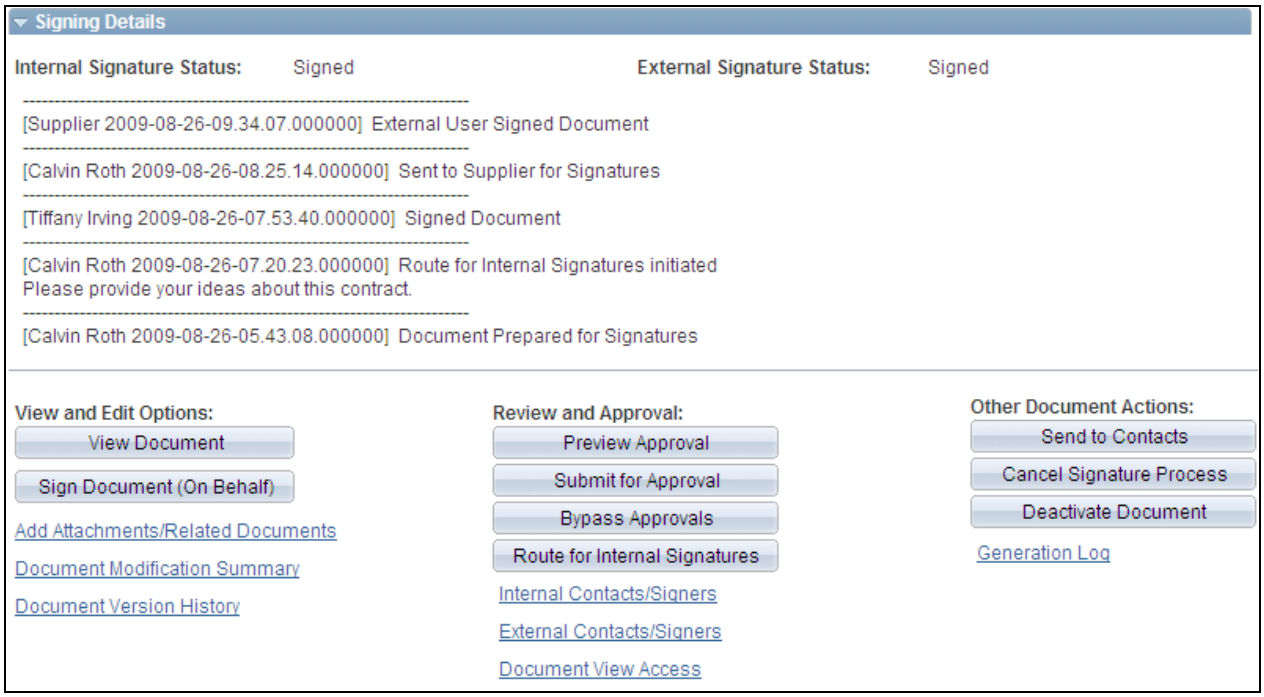
12. After the external user signs and uploads the document, the system updates the document status.

    The next example shows that the internal and external signature statues are Signed:



Document Management page with signing details

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.

Pages Used to Digitally Sign Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Prepare Document for Signatures	CS_DOC_PREPSIGN_SP	Supplier Contracts, Create Contracts and Documents, Document Management Click the Prepare Document for Signing button on the Document Management page.	Preparing documents for signature.
Route for Internal Signatures	CS_DOC_ROUTE_SIGN	Click the Route for Internal Signatures button on the Document Management page.	Routing documents for internal signatures.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Document Management	CS_DOC_MAINT	Click Worklist on the Home page, select the *Sign Review* value in the Work List Filters field, and click the document link.	Sign internal documents using digital signatures.
Cancel All Signatures	CS_DOC_ACTIONS_SP	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.
Cancel Supplier Signatures	CS_DOC_ACTIONS_SP	Click the Cancel Supplier Signing button on the Document Management page.	Cancel the external signature process.
Stop Route for Internal Signatures	CS_DOC_ACTIONS_SP	Click the Stop Internal Signatures button on the Document Management page.	Cancel the internal signature process.
Decline Signing Document	CS_DOC_ACTIONS_SP	Click the Decline Signing Document button on the Document Management page.	Decline signing a contract document and to enter comments about the denial.

Preparing Documents for Signature

Access the Prepare Documents for Signatures page (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.

User 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.

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Signing Title 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.

Visible Signer 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.

Sign Order 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.

Routing Documents for Internal Signatures

Access the page Route for Internal Signatures page (click the Route for Internal Signatures button on the Document Management page).

Route for Internal Signature page

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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.

User Select a user to include for the internal signature routing.

Required to Sign Document Select to indicate that this internal user is required to sign the document. When you select this check box, the Visible Signer and Sign Order fields become available for entry. This field controls the visibility of the Sign Document button when the contract is routed to the user.

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 Sign button or be included in signature routings.

Visible Signer Select to indicate that this internal user's signature will be visible on the contract document. The field is available if the Required to Sign Document 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.

Sign Order Select to indicate that this internal user's signature will be visible on the contract document. The field is available if the Required to Sign Document check box is selected. If a user is not a visible signer

Signed Status Displays the status related to whether a signer has signed a document. Values include:

Initial

Signed

Pending Signature

Replaced by Alternate

Signed by Proxy

Marked as signed

Declined

Signed DTTM (signed date and time) Displays when an internal signer has signed the document and indicates when the signer completed the document.

Signing Internal Documents Using Digital Signatures

Access the page Document Management page (click Worklist on the Home page, select the *Sign Review* value in the Work List Filters field, and click the document link).

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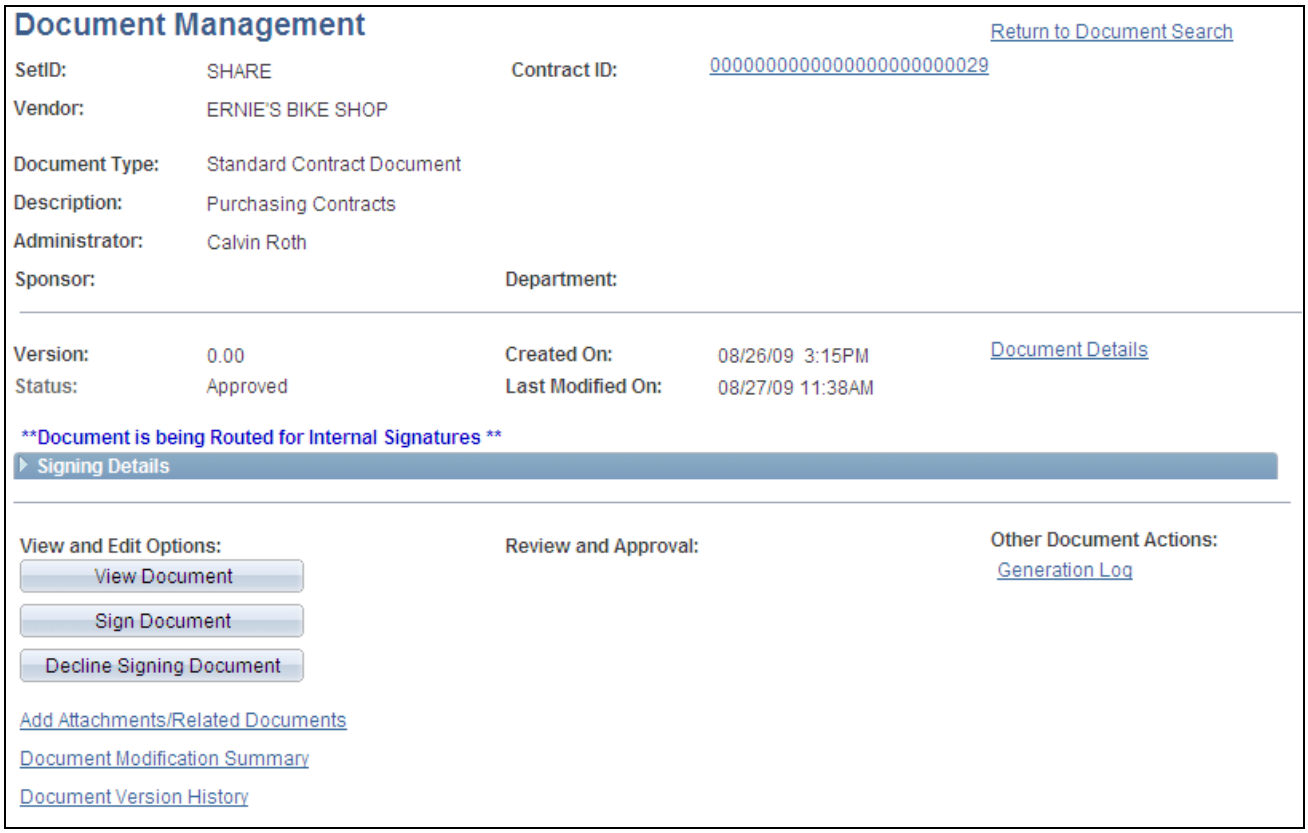

Document Management page for internal signers

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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding How to Set Up Digital Signatures, page 215.

Use the Signing Details section to view the internal and external signature statuses, view any comments, and view the routing history of the document.

Sign Document 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 Upload Signed Document button.

Decline Signing Document 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.

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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.

Executing Documents

This section discusses how to execute documents.

Page Used to Execute Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Management	CS_DOC_MAINT	Supplier Contracts, Create Contracts and Documents, Document Management	Execute documents.

Executing Documents

Access the Document Management page (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.

Defining Contract Amendments

This section discusses how to create an amendment.

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Page Used to Define Contract Amendments

Page Name	Definition Name	Navigation	Usage
Create an Amended Version	CS_DOC_VERSIONS_SP	Supplier Contracts, Create Contracts and Documents, Document Management Click the Create Amendment button on the Document Management page.	Create an amendment.

Create an Amendment

Access the Create an Amended Version page (click the Create Amendment button on the Document Management page).

After you execute a document, you can update it with amendments. The amendment process uses many of the life-cycle features that are described in this chapter. 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 amendment file. This makes it possible to automatically update the amendment file using updates that you made to the amended document.

See Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," Updating Amendment Files Automatically, page 697.

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.

Detailed documentation regarding amendment processing options is described in a separate chapter.

See Also

Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," page 679

Comparing Documents

This section provides overviews of document comparisons and document comparison setup and discusses how to compare documents.

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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.

Document Comparison Setup

You use installation options to enable document comparisons. You must also prepare the system to use the compare feature.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Document Comparisons and Rendering, page 224

Page Used to Compare Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Compare Documents	CS_DOC_COMPARE_SP	Supplier Contracts, Create Contracts and Documents, Document Management Click the Compare Documents button on the Document Management page.	Compare documents.

Comparing Documents

Access the Compare Documents page (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.

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You use the Compare Against field to select which type of comparison you want to make.

Recreated Document 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.

Refreshed Document 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.

Last Executed Document 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 there as well.

See Also

Chapter 13, "Managing Document Life Cycles," Understanding Document Comparisons, page 587

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. The pages include:

- Documents Pending Action (Internal)
- Documents by Due Date (Internal)
- Documents Pending Review (External)

This section discusses the pages used to view documents.

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Pages Used With Document-Related Pagelets

Page Name	*Definition Name*	*Navigation*	*Usage*
Documents Pending Action (Internal)	CS_DOC_PND_PGLT	Opens on login.	View a list of contract documents that are pending your check in, review, approval, or signature. Documents are shown sorted by the cycle due date and created date and amendment created date. This is a general pagelet intended for any administrator or frequent contract collaborator.
Documents by Due Date (Internal)	CS_DOC_DUE_PGLT	Opens on login.	View a list of the most recent upcoming documents ordered 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 displayed on the pagelet.
Documents Pending Review (External)	CS_SUPP_PEND_PGLT	Opens on login.	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 will be displayed on this pagelet for the external user who needs to collaborate or sign the document.

Deactivating and Reactivating Documents

This section discusses how to:

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- Deactivate documents.
- Reactivate documents.

Page Used to Deactivate and Reactivate Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Management	CS_DOC_MAINT	Supplier Contracts, Create Contracts and Documents, Document Management	Deactivate documents. Reactivate documents that have been deactivated.

Deactivating Documents

Access the Document Management page (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

Access the Document Management page (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.

See Also

Chapter 12, "Generating Microsoft Word Documents," page 441

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Chapter 14

Searching for Library and Document Contents

This chapter provides an overview of Verity and where-used searches and discusses how to:

- Set up Verity searches.
- Search for library and document contents.
- Perform where-used searches.

Understanding Verity and Where-Used Searches

This section discusses:

- Verity searches.
- Content search component.
- Content searches within library maintenance.
- Where-used searches.
- Contract management Verity objects index.
- Contract management Verity configurator index.
- Contract management Verity purchase order and ad hoc document index.

Verity Searches

PeopleSoft Supplier Contract Management provides Verity searching 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 file-based search collections. The system creates these collections by extracting current information and key values from the PeopleSoft database using predefine application engine jobs. The system searches for library contents using Verity advanced searching.

The Verity search index process extracts information from the supplier contract database and loads it into Verity formatted files on a process scheduler server. The Verity indexing application transforms those record files into flat files in an index that the system uses for searching. Values indexed in Verity fields are returned back to PeopleSoft Supplier Contract Management using a PeopleSoft PeopleTools search application program interface. The returned values are based on the search attributes that you enter for the search.

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Note. PeopleSoft delivers predefined system data for setting up Verity searches in PeopleSoft Supplier Contract Management. Predefined data includes searches for clauses, sections, document configurators and current authored documents.

The system builds the Verity-based search collection from actual generated Microsoft Word XML documents versus the plain-text versions of the contract as in the previous release. The system stores the most current .xml version of each ad hoc, purchase order, and purchasing contract for searching purposes and generates the Verity collection directly from the Microsoft Word XML file and any other attachments to the contracts.

Verity-type searches in PeopleSoft Supplier Contract Management include content type, and individual object maintenance searches. You can perform searches for clauses, sections, and configurators. You can also search for ad hoc and purchase order and purchasing contracts that include text strings in full-text and object-specific searches, such as searching for 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 against which to perform where-used searches.

While you can further configure Verity searches, this chapter only describes tasks that you need to perform with predefined PeopleSoft Supplier Contract Management search data. These tasks define specific fields to store in the search index and to build and test the index.

See Also

"Configuring Search and Building Search Indexes,"*Enterprise PeopleTools PeopleBook: PeopleSoft System and Server Administration*

PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook, "Implementing the Verity Search Engine"

Chapter 14, "Searching for Library and Document Contents," Setting Up Verity Searches, page 595

PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook, "Implementing the Verity Search Engine," Configuring Verity Search Indexing Options

Content Search Component

PeopleSoft Supplier Contract Management provides two launching points for searches. This section describes the first point, which is a stand-alone component for searching contents. Content searches enable you to search the library, view search results, perform additional where-used searches, and finally update or view the elements using PeopleSoft. The second launching point is from within various Supplier Contract Management maintenance components, such as for clauses and sections, described in the Content Searches in Library Maintenance section.

See Chapter 14, "Searching for Library and Document Contents," Content Searches in Library Maintenance, page 593.

You can search across executed documents or documents at any status. A search can also be limited by 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 type searches support full-text string screening, case-sensitive options, thesaurus searches, wildcard, and Boolean *and* expressions.

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Content-based searches include the capability to search for a text string across multiple ad hoc, purchase order, and purchasing contracts at one time. You can search for attachments which might include supplier papers, Adobe .pdf files, or Microsoft Excel spreadsheets. And finally, you can perform content-based searches for document types, user-defined fields, and imported documents.

Note. If you are using transactional data, such as item or vendor information that display as binds in a document, and you change the transactional data and do not update the document, then Verity text searches will not find the changes. This applies only to text searches against the document, but does not apply to keyword searches. For chartfield searches if you have customized chartfields you may need to customize the Verity setup information in order to include chartfield changes in the Verity collection so they can be searched on.

See Also

Chapter 14, "Searching for Library and Document Contents," Searching Document Content, page 610

Content Searches in Library Maintenance

When you maintain clauses, sections, and configurators, it can be useful to perform full-text verity searches for other elements in the library. The system enables Verity search 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 Verity 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 types of 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. Maintenance searches are performed against clause and sections. For example, searching for a contract line agreement is limited to a clause search because you can only associate clauses with contract agreements; whereas, a section search can include clauses and sections.

These contract maintenance programs use Verity object maintenance searches:

- 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.

  Note. Rules are not included in the Verity 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.

Where-Used Searches

Where-used searches enable you to locate where a document element is used within the document library. You can access where-used searches from maintenance pages and from within the Search Contents component. Where-used searches are performed using PeopleSoft structured query language and while they are not dependent on Verity, you can use them in combination with Verity search results to search and traverse the system.

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 a Verity 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.

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.

See Also

Chapter 14, "Searching for Library and Document Contents," Performing Where-Used Searches, page 620

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Setting Up Verity Searches

Verity is an embedded feature in PeopleTools that enables you to do full-text searching for information. PeopleSoft delivers Supplier Contracts Management with predefined Verity setup values that simplify setting up and using basic Verity search capabilities. This section discusses how to:

- Locate predefined search indexes.
- Build contract search indexes.
- Update contract search indexes.
- Set up daemon groups.

Note. This section does not describe advanced Verity search setup tasks, rather how you use those searches predefined for PeopleSoft Supplier Contract Management.

See Also

PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook, "Implementing the Verity Search Engine"

Pages Used to Set Up Verity Searches

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Data Object Set	SAC_IDX_DO_SET	Supplier Contracts, Search Content, Define Data Object Set	Define data object sets by identifying groups of related records to use for a search index. Data object sets are sets of data objects that are related to each other with level and parent/child information.
Source Data Object	EOEW_SRCDO	Supplier Contracts, Search Content, Define Data Object Set Click the Define Data Objects link on the Define Data Object Set page.	Define data objects. A data object is an Enterprise Common Component object that defines records relationship and is the basis for setting up Verity searches.

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Page Name	Definition Name	Navigation	Usage
Search Index	SAC_IDX_DEFINE	Supplier Contracts, Search Content, Define Search Index	Locate predefined search indexes. Also, to define a new search index and a specific data object set 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.
Search Index Fields	SAC_IDX_FIELDS	Supplier Contracts, Search Content, Define Search Index, Search Index Fields	Define search index fields. To support attachment searches, this page contains the Attachment Type and Attachment Component fields. The attachment type is used to determine where to get the attachment files. For attachment type *SCM Framework*, the system retrieves the attachment files recorded in PV_ATTACHMENTS table, then downloads the file to the collection location. The attachment type should contain a valid uniform resource locator address so that Verity commands have proper access to the files.
Build Search Index	SAC_IDX_RUN_CTRL	Supplier Contracts, Search Content, Build Search Index	Build contract search indexes.
Search Test Page	SAC_IDX_TEST_SEC	Supplier Contracts, Search Content, Build Search Index Click the Test Index link on the Build Search Index page.	Test the index before running it. The system checks for the text that you enter and displays the results about where the text is used and when the element in which it is used has been updated. The display is sequenced and in text format.

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Page Name	Definition Name	Navigation	Usage
Define Search Options	SAC_SRCH_OPTIONS	Supplier Contracts, Search Content, Define Search Options	Activate option codes for searches. For example, these codes include codes that indicate the system should match the case or match the word exactly when searching.
Define Search Query	SAC_SRCH_QRY	Supplier Contracts, Search Content, Define Search Query	Group search fields, field labels, and application classes into a search index that you can use to perform Verity searches for supplier documents. Search queries can include the system-supplied search indexes: CS_CONFIGURATOR, CS_DOCUMENTS, and CS_OBJECTS.
Define Search Results	SAC_SRCH_RSLT	Supplier Contracts, Search Content, Define Search Result	Group search fields, field labels, and application classes into a search index that you can use to perform Verity searches for supplier documents. Search results can include the system-supplied search results: CS_CONFIGURATOR, CS_DOCUMENTS_RESULT, and CS_OBJECTS_RESULT.
Maintain Verity Thesaurus	SAC_SRCH_THESAURUS	Set Up Financials/Supply Chain, Common Definitions, Search Indexes, Maintain Thesaurus	Build a thesaurus for Verity searches, which makes it possible to search for a word that is similar to the search word you use. You build the list starting with a search word and enter the similar or related words. When the system searches on the word, it also includes the synonyms that you define in the search results.
Daemon Group	DAEMONGROUP	PeopleTools, Process Scheduler, Daemon Group	Set up daemon groups.
Daemon Group	SERVERDAEMON	PeopleTools, Process Scheduler, Servers, Daemon	Define daemon group details. This includes defining the time interval for when the process checks for any updates to clauses and documents.

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Locating Predefined Search Indexes

Access the Search Index page (Supplier Contracts, Search Content, Define Search Index).

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:

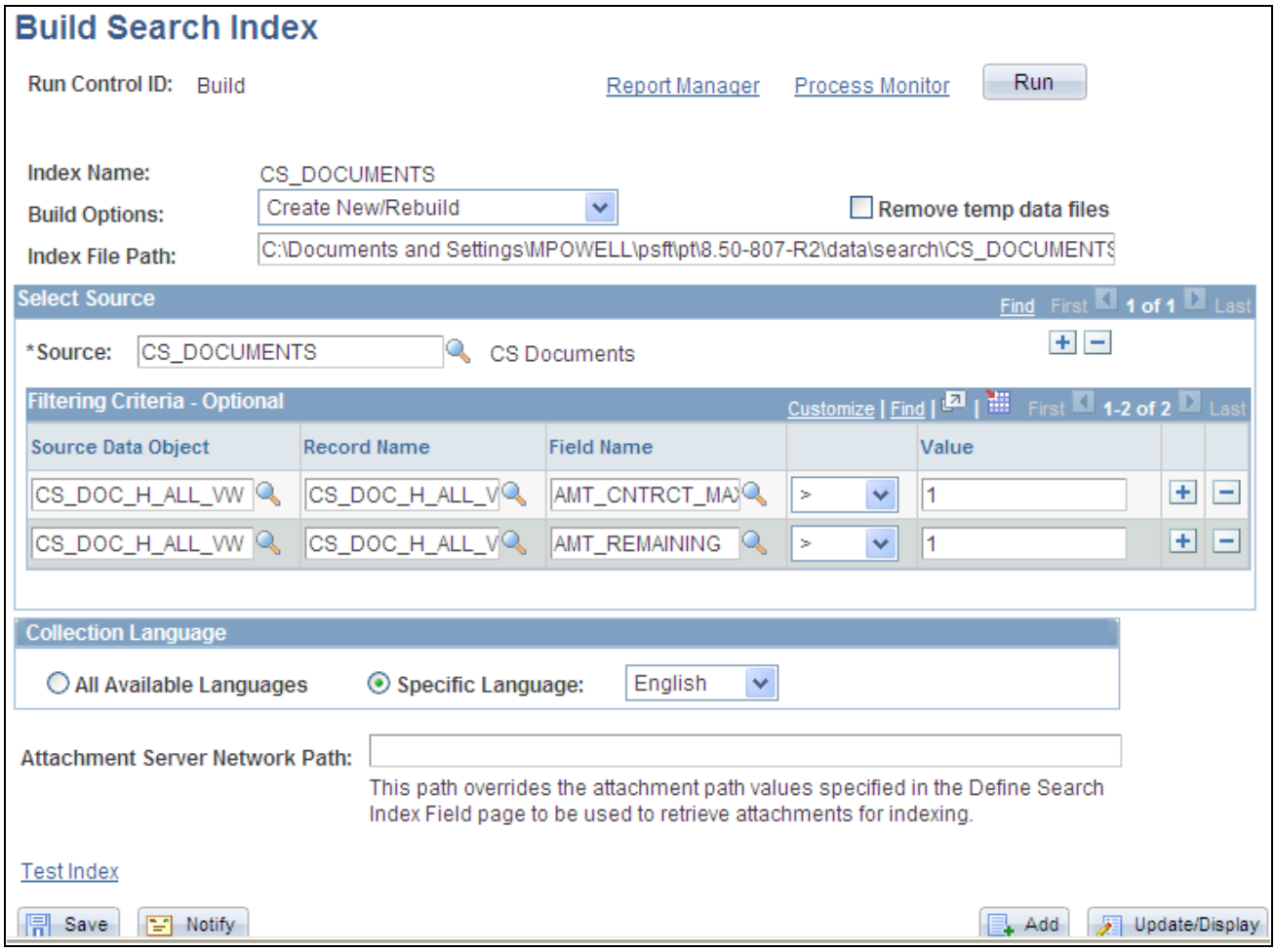
CS_OBJECTS: Contains clause and section search fields.

CS_CONFIGURATOR: Contains document configurator search fields.

BUILD_CS_DOCUMENTS: Contains search fields for ad hoc, purchase order, and purchasing contract search indexes.

Building Contract Search Indexes

Access the Build Search Index page (Supplier Contracts, Search Content, Build Search Index).



Build Search Index page

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Use this page to create and update the Verity 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 first create three run controls that the system uses to build or rebuild the entire index. After building the indexes, if you change the clause, section, document configurators, or ad hoc, purchase order, or purchasing contract documents, you can use the *Last Modified Index* build option to refresh the indexes.

See Chapter 14, "Searching for Library and Document Contents," Updating Contract Search Indexes, page 601.

To create the initial search indexes, create these run controls and submit them for processing:

- BUILD_CS_OBJECTS

  Run to create clause and section search indexes. Select the *CS_OBJECTS* index when adding this run control.

- BUILD_CS_CONFIGURATOR

  Run to create document configurator search indexes. Select the *CS_CONFIGURATOR* index when adding this run control.

- BUILD_CS_DOCUMENTS

  Run to create ad hoc, purchase order, and purchasing contract search indexes. This enables you to search for a text string across both document sources at the same time. Select the *CS_DOCUMENTS* index when adding this run control.

Note. The system uses values defined on the configuration file, located on the application server, as the index file path default value.

See *PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook*, "Implementing the Verity Search Engine," Building the Verity Search Index.

Run Control ID Displays the run control ID for either building or updating search indexes. You initially define the value for this field.

Index Name Displays the search index that you will build or update. Three IDs are for initially building the indexes and the other three are for performing net-change updates to indexes. Supplier Contract Management values for this field are:

BUILD_CS_CONFIGURATOR

BUILD_CS_DOCUMENTS

BUILD_CS_OBJECTS

LAST_MOD_CS_CONFIGURATOR

LAST_MOD_CS_DOCUMENTS

LAST_MOD_CS_OBJECTS

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Build Options

Select a build option. Build options are the methods that you use to create and update a search index. Options include:

Create New/Rebuild: Select to create the initial search index. You must run this option for each of the three contract management search indexes before you can refresh the index file. After creating the initial file, you can then maintain the file using the Update Last Modified option.

When you create the initial file, the system gathers the fields that are defined for the search index, creates a flat file from the fields, and stores the file on the server that is defined in the Index File Path field.

Update: Select to build a search index based on additional structured query language selection criteria.

Note. You do not need to use this option to create or update predefined contract management searches.

Update Last Modified: Select to update a Verity search index based on the last modified records from various records. This option is mainly for incremental-search index updates. Each time that you build or update the index, the system stores the last modified date and time stamp. Using the contract library, the system also stores the last modified date and time when you add or change an element or its contents in the base tables.

When you select this option, the system only selects the elements and their contents that have the last modified date and time stamp that is greater than the index's last modified date and time stamp. The system updates the search index file accordingly.

The system uses the date value that was last modified from the Define Search Index page on which to base the update. The system does not update records with changes that were made prior to that date. You must run this option for each of the three contract management search indexes to update the index file.

This is a manual update. You can set up automatic updates using a daemon group to schedule processing.

See Chapter 14, "Searching for Library and Document Contents," Setting Up Daemon Groups, page 602.

Remove temp data files

Select this check box to remove temporary data files that the system stores when it builds a Verity collection. The system creates temporary data files (.bif and .dat) from extracted database information to be included in the index. These files can be large. You might want to remove them unless you are reviewing them after builds for debugging purposes.

Index File Path

Displays where the Verity index flat file is located. When you build or update searches, the system updates files at this location.

Source

Displays the source data set from which you will build or update this search index.

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Test Index Displays the search index that you will build or update. When you access the page, you can enter a text string on which to search. The system checks for the text and displays the information about where the text is used and when the element in which it is used was updated. The system displays the information in sequence and in text format.

Note. Verity search collections for transactional and ad hoc authored documents are possible for only the current version of the document content, and not all prior versions. Furthermore, the system creates the collection based on the text content in the body of the authored document stored in the PeopleSoft database rather than in the document file stored on the server.

Attachment Server Network Path Enter a value to override the attachment path values specified on the Define Search Index Field page that the system will use to retrieve attachments for indexing.

Filtering Criteria - Optional for Create New/Rebuild

Use this grid box to define source data objects, record names, and field names. Filter criteria is optional when you create or rebuild an index, but is required when you update or update the last modified records for the search index. These variables limit searches to more specific data.

Use the Value field to enter attributes for field values that you to include in the search index.

Collection Language

Use this grid box to define language information for the Verity search index.

All Available Languages Select to include all available languages when you create or build the index.

Specific Language Select a language code. You can index Verity for each language, for example, English, Spanish, or Dutch. Selecting language codes makes it possible to support multiple languages in one system.

Updating Contract Search Indexes

Access the Build Search Index page (Supplier Contracts, Search Content, Build Search Index).

After initially building a search index, you should keep it updated to reflect changes that are being made in the contract library. You use the *Update Last Modified* build option in the Build Options field to run the update manually. Or, you can alternatively set up a daemon group to automatically update the index files periodically. You should set up either of these processes to run as frequently as needed depending on how often changes are made to the library elements and authored documents.

To update the search indexes manually, create run controls values that are based on the corresponding Verity search index, and submit them for processing. These values include:

- LAST_MOD_CS_CONFIGURATOR

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- LAST_MOD_CS_OBJECTS
- LAST_MOD_CS_DOCUMENTS

See *PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook*, "Implementing the Verity Search Engine," Building the Verity Search Index.

Setting Up Daemon Groups

Access the Daemon Group page (PeopleTools, Process Scheduler, Daemon Group).

Use this page to add the CS_SRCH_DAEM process to the daemon group. You use daemon processing to save time in rebuilding the index. You can set daemon processes to periodically schedule a job to update indexes for you. The system checks for updates to contract records and when it finds a change, it automatically runs the Update Last Modified Index Build process so that you don't have to run the update process manually.

Note. When setting up a daemon process, you must restart the application server to which the process links.

To locate the CS_SRCH_DAEM process and set its timing:

1. Select PeopleTools, Process Scheduler, Daemon Group.
2. Click the Load All Programs button to load all available application engine programs.

   Programs must be marked as daemon in their properties to be available. The CS_SRCH_DAEM process should appear in the list.
3. Select PeopleTools, Process Scheduler, Servers, Daemon.
4. Select a server and then select the Daemon tab.
5. Select *CS_SRCH_DAEM* from the Daemon Group field list of values.
6. Click the Save button.

   The system checks whether there have been updates to document elements. When a change is detected within the daemon sleep time, the system initiates the Update Last Modified Index Build process. You do not need to run from the Build Index process.

See Also

"Setting Server Definitions," *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*

Searching for Library and Document Contents

This section provides a lists of common elements and discusses how to:

- Search clause content
- Search section content

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- Search configurator content
- Search document content.
- Review document search results.

Note. You can also use much of the information provided in the next sections when performing Verity searches from within library maintenance definition pages.

Common Elements Used in This Section

Content Type

Select the type of content for which 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 Search button to review results that match the search attributes. Field values are:

- *Clause:* Select to search the contents of clauses.
- *Document:* 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.
- *Document Configurator:* Select to search the ad hoc contents of document configurators.
- *Section:* Select to search the contents of sections.

Note. 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 that are used in the configurator, you use a where-used search. You can also perform these searches from an element's maintenance component.

Date Range

Use Date Range group boxes to select date ranges for when a user or multiple users took specific actions against a clause, document, configurator, or contract. 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.

Exact Word

Select to match exact words in the search. Use the Define Search Options page to make this option active on the Search Content by Type page.

Title or Body Text

Enter the text that you want to find in the clause. The system searches through titles for the content type that you selected, as well as the body of the text in document.

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Ad Hoc Clause Verbiage 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.

Match Case Select to indicate that you want to match upper and lower case characters. Use the Define Search Options page to make this option active on the Search Content by Type page.

Use Thesaurus Select to indicate that you want to use the Verity thesaurus for searching. During the search, the system searches for like terms that you define for a word. To define a thesaurus, you create a list of similar or like terms using the Maintain Verity Thesaurus page. To access the page, select Set Up Financials/Supply Chain, Common Definitions, Search Indexes, Maintain Thesaurus. Use the Define Search Options page to make this option active on the Search Content by Type page.

See Also

PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook, "Implementing the Verity Search Engine"

Pages Used to Search for Library and Document Contents

Page Name	*Definition Name*	*Navigation*	*Usage*
Search Content By Type	CS_CONTENTS_SEARCH	Supplier Contracts, Search Content, Search Contents Select either *Clause*, *Document*, *Document Configurator*, or *Section* in the Content Type field on the Search Content by Type page.	Search content by clause, documents, configurators, and sections.
Chartfields Search Criteria	CS_CONT_CF_EXP CS_PUR_CF_EXP	Click the Chartfields link in either the purchase order or purchasing contract section on the Search Content By Type page.	Define searches for purchase order and purchasing contract source transaction chartfields. Verity searching enables you to identify related contracts by chart fields such as department and project as part of contract searching.

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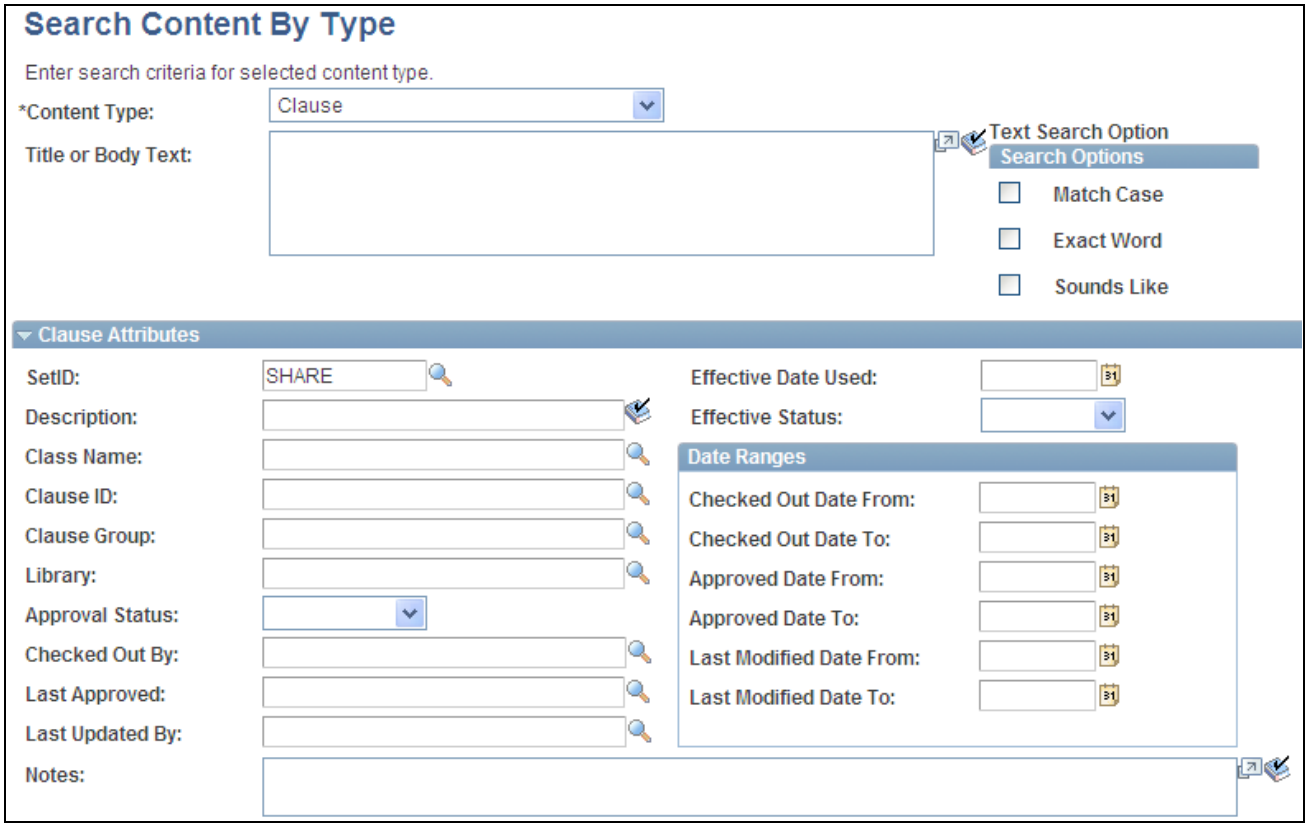
Page Name	Definition Name	Navigation	Usage
Search Content By Type	CS_CONTENTS_DOC	Supplier Contracts, Search Content, Search Contents Select either *Clause*, *Document*, *Document Configurator*, or *Section* in the Content Type field on the Search Content by Type page. Click the Search button on the Search Content By Type page.	Populate the Search Results grid with the results of a search for clause, documents, configurators, and sections.

Searching Clause Content

Access the Search Content by Type page (Supplier Contracts, Search Content, Search Contents, and select *Clause* in the Content Type field).



Search Content by Type clause page (1 of 2)

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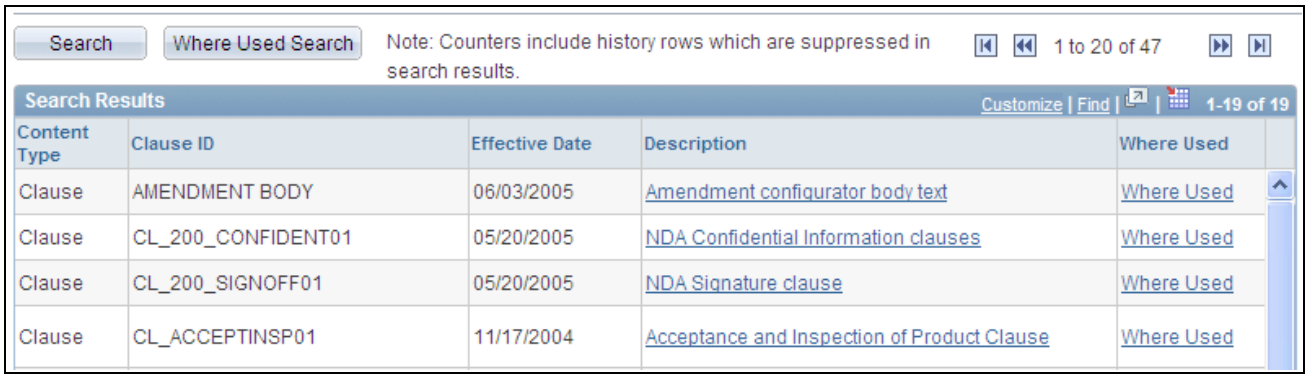

Search Content by Type clause page (2 of 2)

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.

Note. To ensure that you have the most up-to-date search collection, run the Build Search Index process for the CS_OBJECTS index. The system provides a message at the bottom of the page that indicates when the collection was last built.

Description 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 Search Results grid and that meet the remaining search attributes. If you enter a clause ID, the system populates this field with its description.

Class Name 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.

Effective Date Used 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.

Note. When searching for only current or specific effective-dated results, the system suppresses history rows during Verity searches. The Verity search counter displayed above the grid counts history rows and includes them in its count results. So, it's possible that a Verity 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.

Status (Effective) Select to search for clauses or sections that are *Active* or *Inactive*. If you leave the field blank, the system searches for both statuses.

Clause ID 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 Description field. If the clause is assigned to a group or library, the system also populates those fields. When searching documents, a Clause ID field enables you to search for specific documents that use this clause.

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Clause Group 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.

Library 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.

Approval Status 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 *Approved,Initial,* and *Pending.* Sections do not approval workflow, so the Pending status does not apply to sections.

Checked Out By, Last Approved and **Last Updated By** Select to search for clauses that are based on actions that have been taken by users. For example, if you want to locate clauses that are currently checked out by a user, select the user ID.

Notes Enter a text sting on which to search in notes. The system searches Notes fields for all the clauses, sections, or configurators as part of the search.

Search Click this button to initiate the search process and produce search results.

Where Used Search Click this button to initiate a search for a clause, section, or configurator depending on the search page content type.

See Chapter 14, "Searching for Library and Document Contents," Searching for Library and Document Contents, page 602.

Check Out Date From and **Check Out Date To** 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.

Approved Date From and **Approved Date To** Select a date range. You can search for when clause statuses were approved within the date range selected.

Last Modified Date From and **Last Modified Date To** Select a date range. You can search for when clause attributes were last modified within the date range that you select.

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.

Description 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.

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Where Used 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.

Searching Section Content

Access the Search Content By Type page (Supplier Contracts, Search Content, Search Contents, and select *Section* in the Content Type field).

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 by Content Type page vary depending on the type of content search. Fields that are not defined in this section are defined in the Searching Content by Clause section.

Note. To ensure that you have the most up-to-date search collection, run the Build Search Index process for the CS_OBJECTS index. The system provides a message at the bottom of the page that indicates when the collection was last built.

Section Type Select a section type to use in the search. Values are:

General: Select to include only general sections in the search results. These are overall sections that can be used throughout a document.

Introduction/Title: Select to include only introduction sections in the search results. These are the first sections in documents.

Section ID Select a section for which you want to search. This restricts the search to a single section.

Search Results

This grid appears with the results of the search when you select to search content by section. The *Content Type,Clause ID,* and *Effective Date* fields display information about the section.

Description 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.

Where Used Click to access the Search for All Content Instances page. The page displays where the section is used throughout this setID. You can navigate to each use of the section.

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See Also

Chapter 14, "Searching for Library and Document Contents," Searching Clause Content, page 605

Searching Configurator Content

Access the Search Content By Type page (Supplier Contracts, Search Content, Search Contents, and select *Document Configurator* in the Content Type field).

Use this page to search for document configurators that match the selection criteria that you enter.

Note. Fields on the Search by Content Type page vary depending on the type of content search. Fields that are not defined in this section are defined in the Searching Content by Clause and Searching Content by Document sections.

To ensure that you have the most up-to-date search collection, run the Build Search Index process for the CS_CONFIGURATOR index. The system provides a message at the bottom of the page that indicates when the collection was last built.

Word Template Name — 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.

Wizard ID — 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.

Configurator Status — Select a status on which to base the search. Values are *Available, In Progress,* and *Obsolete.*

Created Date From 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.

Approved Date From and**Approved Date To** — Enter a range of values on which to search for document configurators. This date range search results includes status changes to configurators within the two dates that are provided and that meet other search attributes.

Last Modified Date From and **Last Modified Date From** — Enter a range of values on which to search for document configurators. The system displays the configurators that were changed within the two dates you provide.

Search Results

This grid appears with the results of the search when you select to search content by document configurator. The *Content Type,Clause ID,* and *Effective Date* fields display information about the configurator.

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Description	Click to access the Configurator Definition page where you can view information about the configurator. You can navigate to review each content element of the configurator.
Where Used	Click to access the Search for All Content Instances page. The page displays where the configurator is used throughout this setID. You can navigate to each use of the configurator. For example, you can locate and access document types that use the configurator you selected.

See Also

Chapter 14, "Searching for Library and Document Contents," Searching Clause Content, page 605

Searching Document Content

Access the Search Content By Type page (Supplier Contracts, Search Content, Search Contents, and select *Document* in the Content Type field).

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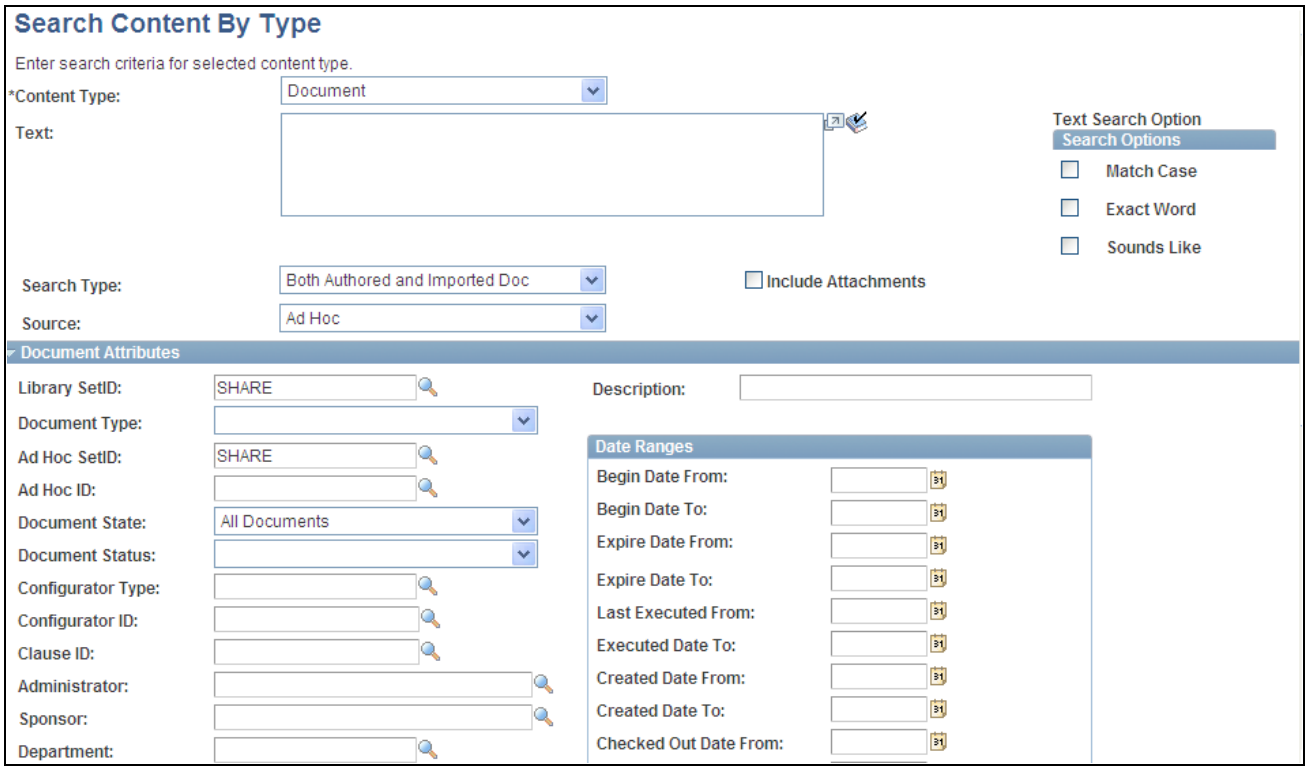
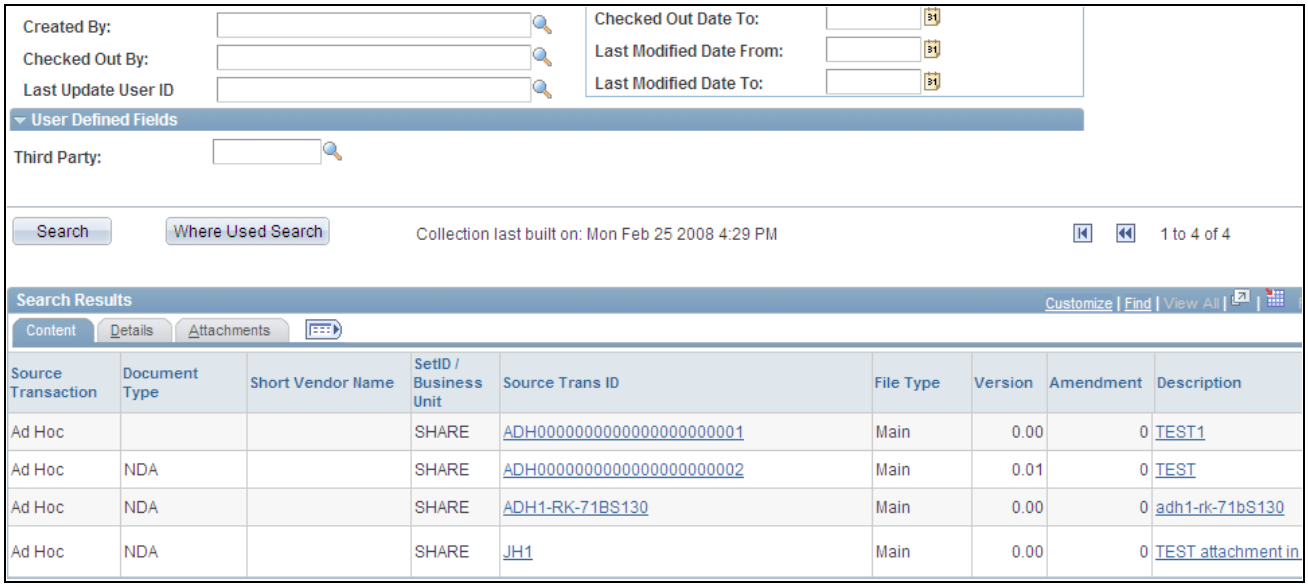


Search Content by Type document type page (1 of 2)



Search Content by Type document type page (2 of 2)

Use this page to:

- Search for ad hoc documents that match certain attributes.

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- Search for transactional purchase order contract and purchasing contract information and contract document attributes.

  If you select *Purchasing Contracts* or *Purchase Orders,* the system uses both document and either the purchase order attributes or the purchasing contract attributes for the search. This provides search capabilities across transactions in the purchase order or purchasing contract, and 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.

  Note. To use Verity searching with purchase order and purchasing contract documents, you must select to enable purchase orders and purchasing contracts on the Installation Options page.

- Search for ad hoc, purchase order, and purchasing contract text strings in the same search.
- Search for user-defined fields if they have been defined and used.

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.

Note. If you are using transactional data, such as item or vendor information that display as binds in a document, and you change the transactional data, but do not update the document, then Verity text searches will not find the changes. This applies only to text searches against the document, but does not apply to keyword searches.

Note. To ensure that you have the most up-to-date search collection, run the Build Search Index process for the CS_DOCUMENTS index. The system provides a message at the bottom of the page that indicates when the collection was last built.

Search Type

Select the type of search you want to perform. *Both Authored and Imported Doc* is the default value for the field. Values include:

Authored Documents Only: Select to search for documents that were created using the document authoring system.

Both Authored and Imported Doc: 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.

Imported Documents Only: 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.

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Include Attachments Select this check box to search for supporting attachments, such as supplier papers and spreadsheets. The system uses the search type you select in conjunction with this check box. The default value for the Include Attachments check box is deselected.

The system uses the text string you enter to search file attachments with AND conditions from other attributes. For example, if you enter *inspection contract* in the text string, along with the *Purchasing Contracts* source transaction, the system searches all purchasing contracts for contracts with file attachments containing the inspection contracts text sting. If you select the Include Attachment check box, the system displays all the supporting attachment file names and their descriptions.

Note. When you search for attachments, the system only searches for supported Verity formats. Some formats, such as image-based formats, may not be searchable.

Source Select a document source on which to base a search. Values include *Ad Hoc*, *Purchase Orders*, and *Purchasing Contracts*. The value that you select determines the content for the page.

If you select *Ad Hoc*, the system uses only document attributes for the search. Ad hoc documents are not linked to transactions. The PO Contract Attributes (purchase order contract attributes) and Purchase Order Attributes grids do not appear when you select to search for ad hoc documents.

Document search attributes are the same for ad hoc, purchasing contracts, and purchase order searches. If you leave the field empty, the system searches documents for ad hoc, purchase order, and purchasing contracts that match the other criteria you enter on this page. The default value for the field is blank.

Note. If the Filter Results Without Chunking For Documents 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.

Document Attributes

This grid is available for both ad hoc, purchase order, and purchasing contract 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.

Library SetID Select the library setID upon which you want to base the search.

Description 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.

Document Type 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.

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Ad Hoc SetID Select an ad hoc setID in which to search for a document. This field is available when you select *Ad Hoc* in the Source field.

Ad Hoc ID Select the ID for the ad hoc document for which you want to search. This field is available when you select *Ad Hoc* in the Source field.

Document State Select to search for ad hoc, purchase order, or purchasing contract documents according to their state. The default value for the field is *All Documents.* You can also search for *Inactive Documents Only* or *Active Documents Only*.

Document Status 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:

Approved

Collaborated

Collaborated, Pending Review

Complete

Dispatched

Draft

Executed

Pending Approval

Pending Collaboration

Pending External Collaboration

Pending Internal Review

Configurator Type 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.

Configurator ID 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.

Clause ID 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.

Administrator Select to search for documents that are based on the administrator.

Sponsor 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.

Department Select a value to search for documents that are sponsored by a single department.

Created By, Checked Out By, and **Last Update User ID** Select to search for documents that a user has created, checked out, or last updated.

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Begin Date From	Select a value to search for a contract begin date from.
Begin Date To	Select a value to search for a contract begin date to.
Expire Date From	Select a value to search for a contract expiration date from.
Expire Date To	Select a value to search for a contract expiration date to.
Last Executed From	Select a value to search for a contract last execution date from.
Executed Date To	Select a value to search for a contract last execution date to.
Created Date From	Select a value to search for a contract creation date from.
Created Date To	Select a value to search for a contract creation date to.
Checked Out Date From	Select a value to search for a contract checked out date from.
Checked Out Date To	Select a value to search for a contract checked out date to.
Last Modified Date From	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.
Last Modified Date To	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.

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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up User-Defined Fields, page 260.

Purchase Order Attributes

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.

Note. See the next topic for descriptions of the Vendor ID, Vendor Name,Currency Code,Category,Item ID, and Item Description fields and the Chartfields link.

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Business Unit	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.
PO Status (purchase order status)	Select a purchase order status on which to base a search. Statuses range from *Open* to *Approved* and *Complete*.
PO Number (purchase order number)	Select a purchase order number on which to base the purchase order document search.
Buyer	Select a buyer on which to base the document search. This is the buyer defined on the purchase order.
Vendor ID	Select a vendor on which to base the document search.
PO Reference (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 Maintain Purchase Order - Purchase Order page.
Vendor Name	Select a vendor name on which you want to base the search for purchasing order documents.
Currency Code	Select a currency code on which to base a search.
Category	Select an item category on which to base the search.
Hold From Further Processing	Select to identify those purchase orders that are on hold from further processing.
Item ID	Select an item to include in search results.
Budget Checked	Select to filter only those POs that have been budget checked. Budget checking is available when commitment control is enabled for PeopleSoft Purchasing.
Chartfields	Click this link to access the Chartfields Search Criteria page where you can select individual default chartfields
PO Date From	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.
Amount Open From and **Amount Open To**	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.
PO Date To	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

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.

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SetID Select the setID in which you want to search for a purchasing contract document.

Contract Status 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.

Values include:

- *Approved for Purchasing*
- *Canceled*
- *Closed, May be Purged*
- *Hold, Awaiting an Action*
- *Open, Requires Approval*

Contract ID 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.

Description Enter a contract description on which to search. The system displays all contracts with this text in the search results.

Vendor ID Select a vendor identifier on which you want to base the search for purchasing contract documents.

Currency Code Select a currency code on which to base a contract search.

Chartfields 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.

Among the standard chartfields available in the search criteria are: Operating Unit,Fund Code, Budget Reference, and Project. If you customize chartfields, the Verity setup data may need to be customized to support adding your own chartfields to the collection so they can be searched on.

Note. You can select the General Ledger business unit on which to base the Chartfields search. The GL Business Unit field is required when you are searching for content using the Program Code and Class Field fields. If you do not select a GL business unit, the system does not provide search results for these two fields.

Vendor Name Select a vendor name on which you want to base the search for purchasing contract documents. The system displays all contracts that use this vendor and meet other search attributes in the search results.

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Process Option 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.

Field values are:

- *General Contract*
- *Prepaid Voucher*
- *Prepaid Voucher w/Advance PO* (prepaid voucher with advance purchase order)
- *Purchase Order*
- *Recurring PO Voucher* (recurring purchase order voucher)
- *Recurring Voucher*
- *Release to Single PO Only* (release to single purchase order only)

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook* , "Using Voucher and Order Contracts."

Master Contract ID 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.

Administrator 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.

Item Category 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.

Item ID Select an item to include in search results. The system displays contracts in the search results that contain this item.

Approved By Select a user on which to base a search for contracts. The system searches for all contracts that this user has approved.

Item Description Enter an item description against which to perform a search. The system searches for the text stream that is used in the Description field on the line item.

Contract Category 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.

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Maximum Amount From and **Maximum Amount To**

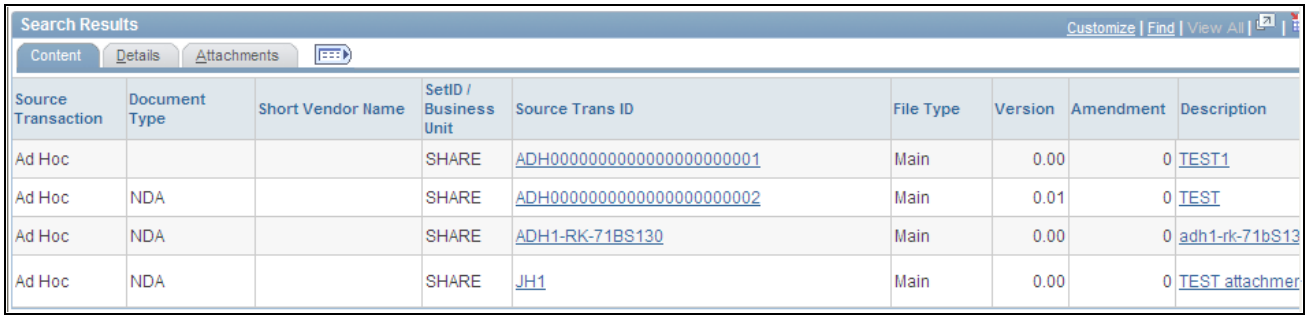
Enter a range of values on which to search for purchasing contracts.

Remaining Amount From 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.

Reviewing Document Search Results

Access the Search Content by Type page: Search Results grid. (Supplier Contracts, Search Content, Search Contents, and click the Search button).


Search Results

Customize | Find | View All

Content | Details | Attachments

Source Transaction	Document Type	Short Vendor Name	SetID / Business Unit	Source Trans ID	File Type	Version	Amendment	Description
Ad Hoc			SHARE	ADH00000000000000000000001	Main	0.00	0	TEST1
Ad Hoc	NDA		SHARE	ADH00000000000000000000002	Main	0.01	0	TEST
Ad Hoc	NDA		SHARE	ADH1-RK-71BS130	Main	0.00	0	adh1-rk-71bS13
Ad Hoc	NDA		SHARE	JH1	Main	0.00	0	TEST attachmer

Search Content by Type page: Search Results grid

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.

Source Transaction

Displays either *Purchase Order*,*Purchasing Contract* or *Ad Hoc*, depending on the selection that you make in the Source field. If you selected to search based on both sources, then both sources will appear in the results.

Document Type

Displays the document type for the document. If document types are not set for use in installation options, the column does not appear.

Short Vendor Name

Displays the short name for the vendor.

SetID

Displays the setID to which this document belongs.

Contract ID

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

File Type

Displays the file type for a document. File types can be *Main*,*Doc Attach* (document attachment), and *Txn* transaction attachment.

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Version	Displays the version number for the document.
Amendment	Displays the amendment number for the document.
Description	Displays a system-generated description that indicates the use of this document. Click the value to access the Document Management page.
Where Used	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.
View	Click the View 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

This section discusses how to search for where document elements are used. Where-Used functionality enables you to traverse and identify document elements in addition to searching content of document library elements using Verity searches.

For example, you can use the two features in combination by first using Verity searches to identify specific clauses that might contain specific text that you need to edit. Then you can identify sections, configurators, and documents that you need to review and update.

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.

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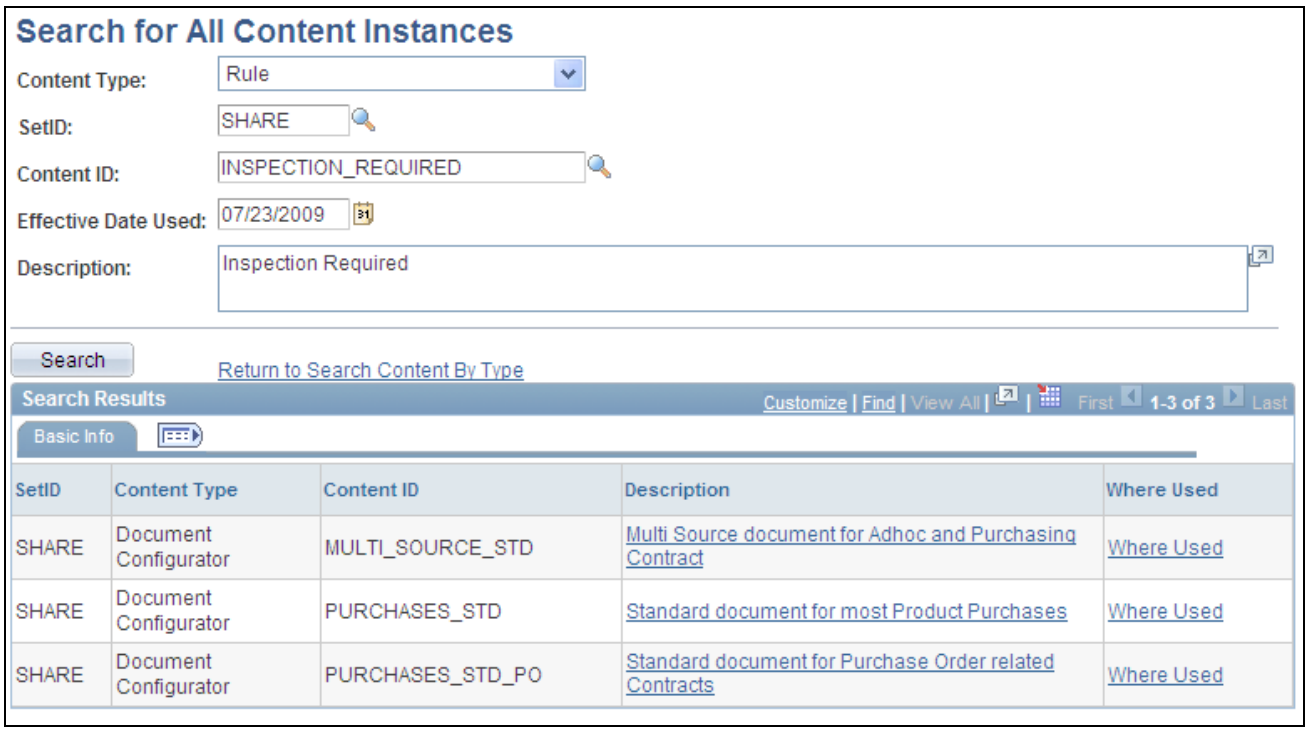
Page Used to Perform Where-Used Searches

Page Name	Definition Name	Navigation	Usage
Search for All Content Instances	CS_CONTENTS_XREF	Supplier Contracts, Search Content, Search Contents Click the Where Used Search button on the Search Content by Type page.	Search where document elements are used. This includes searches for bind variable, clauses, documents, configurators, question groups, rules, sections, and wizard definitions.

Searching for Where Document Elements are Used

Access the Search for All Content Instances page (click the Where Used Search button on the Search Content by Type page).



Search for All Content Instances page: Basic Info tab

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 Verity searches.

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Content Type Select the type of document element for which you want to search. This is a required field. Search values are:

Bind Variables

Clause

Document

Document Configurator

Question Group

Rule

Section

Wizard Definition

Word Template

SetID Select a setID on which to base the search. This field is not available for bind variables.

Content ID 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 Content Type field. This is a required field.

Source Select the source transaction on which you want to base a search. This field is available for document content types. Values include *Ad Hoc*,*Purchase Orders*, and *Purchasing Contracts.*

Ad Hoc ID Select an ad hoc document ID for which you want to search. This field is available when you search for ad hoc sources.

Contract ID Select the contract ID for which you want to search. This field is available when you search for purchasing contract sources.

PO ID(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.

Effective Date Used 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 that reference the clause for this effective date.

Search Results

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.

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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.
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 effects 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.

More Details

Select the More Details tab.

Use this page to view additional document information. This information includes the document's version, amendments, and the amendment option. The tab is available when you search for a document or document configurator.

See Also

Chapter 14, "Searching for Library and Document Contents," Where-Used Searches, page 594

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Chapter 15

Creating Reports for Library and Document Contents

This chapter provides an overview of PeopleSoft Supplier Contract Management reports, lists common definitions, and discusses how to:

- Create reports.
- Access other procurement contract reports.

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 XML Publisher. To create the reports you do not need to use PeopleCode, and there are not any custom pages required to run the reports.

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, XML 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.

Common Elements Used in This Section

As Of Date 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 As Of Date field value.

Created Date Fromand **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 Created Date From field must be earlier than or equal to the to date.

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Department Select a department on which to base a contract document search.

Document Administrator Select a document administrator on which to base a contact document report. The system retrieves information about those documents for which the administrator is responsible.

Document Status 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.

Document Type 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.

Last Modified Date From and**To Date** 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.

Library SetID 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.

Sponsor Select a sponsor on which to base the report.

Source Transaction 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.

Valid values include:

Ad hoc: A stand-alone document that is not associated with a transaction. When you select this value, the system displays the Ad Hoc ID field and ad hoc ID from and to fields.

Purchasing Contract: 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.

Purchase Order: 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 Business Unit and Purchase Order ID From and Purchase Order ID To fields.

Also, if you select *Purchase Order*, the system displays the Vendor SetID and Vendor ID fields for you to define specific vendors.

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Template ID 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:

- Document Status Summary report – CS_DOC_STAT1 template
- Document Status Detail report – CS_DOC_STAT2 template
- Contract Content Deviations report – CS_OBJ_DEV template
- Contract Content Deviations Summary report – CS_OBJ_DEV_2 template
- Contract Content Deviations by Contract report – CS_OBJ_DEV_3 template
- Unused Contract Content report – CS_OBJ_UNUSE template
- Contract Content Usage report – CS_OBJ_USAGE template

Creating Reports

This section provides an overview of PeopleSoft Supplier Contract Management reports, lists common definitions, and discusses how to:

- Create Document Status Summary reports.
- Create Document Status Detail reports.
- Create Contract Content Deviations reports.
- Create Unused Contract Content reports.
- Create Contract Content Usage reports.
- Access procurement contract reports.

Pages Used to Create Supplier Contract Management Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Status Summary	CS_RPT_DSTAT1	Supplier Contracts, Reports, Document Status Summary	Create Document Status Summary reports.
Document Status Detail	CS_RPT_DSTAT2	Supplier Contracts, Reports, Document Status Detail	Create Document Status Detail reports.

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Page Name	Definition Name	Navigation	Usage
Contract Content Deviations	CS_RPT_OBJDEV	Supplier Contracts, Reports, Contract Content Deviations	Create Contract Content Deviations reports. Three versions exists 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.
Unused Content	CS_RPT_OBJUNUSE	Supplier Contracts, Reports, Unused Contract Content	Create Unused Contract Content reports.
Content Usage	CS_RPT_OBJUSE	Supplier Contracts, Reports, Contract Content Usage	Create Contract Content Usage reports.

Creating Document Status Summary Reports

Access the Document Status Summary page (Supplier Contracts, Reports, Document Status Summary).

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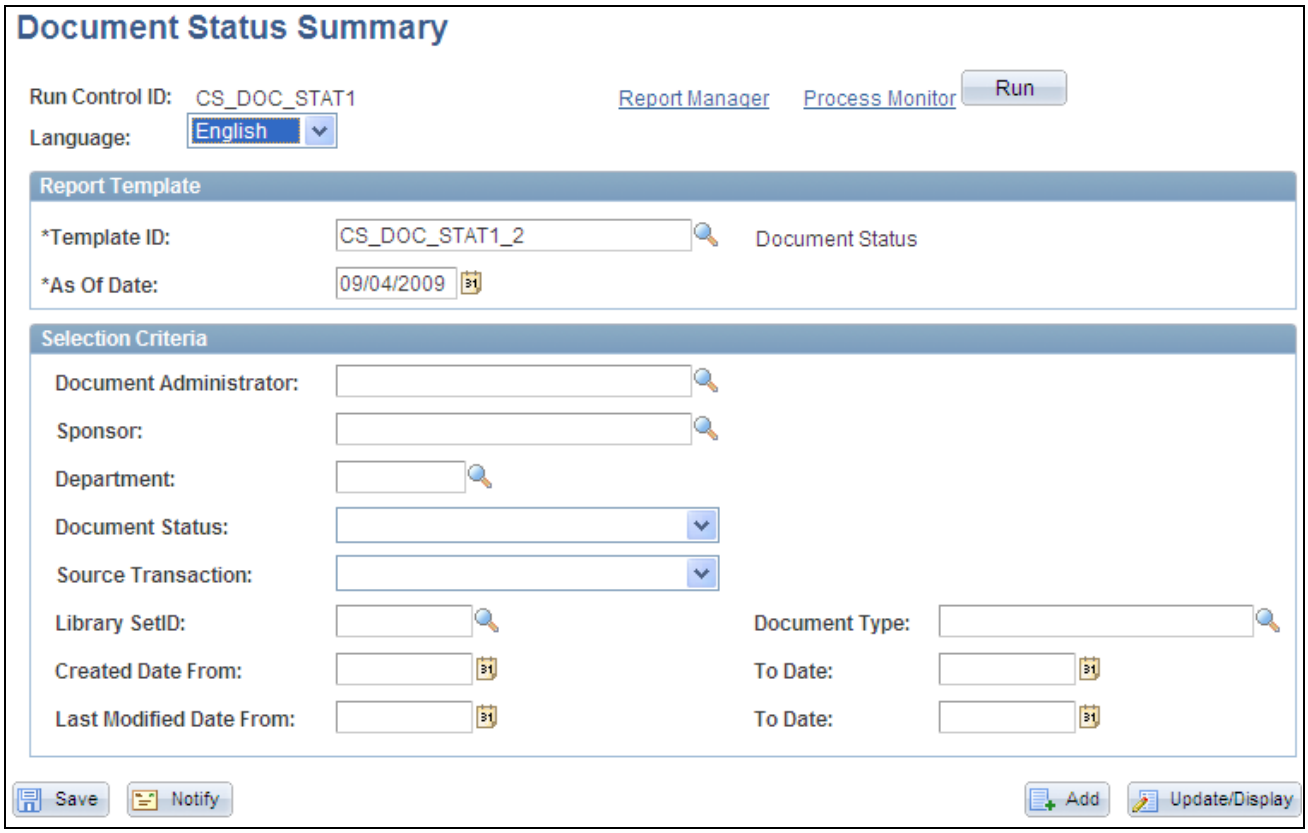

Document Status Summary page

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.

See Also

Appendix D, "PeopleSoft Supplier Contract Management Reports," Document Status Summary (CS_DOC_STAT1), page 756

Creating Document Status Detail Reports

Access the Document Status Detail page (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.

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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.

See Also

Appendix D, "PeopleSoft Supplier Contract Management Reports," Document Status Detail (CS_DOC_STAT2), page 758

Creating Contract Content Deviations Reports

Access the Contract Content Deviations page (Supplier Contracts, Reports, Contract Content Deviations).

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.

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.

Report Template

Use this group box to define template information for the report.

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Template ID Select a template for use with the report. The Contract Content Deviations report has three different template views. They are:

- *CS_OBJ_DEV_1:* 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.
- *CS_OBJ_DEV_2:* Content Deviation Summary: This view is similar to the Content Deviation report (CS_OBJ_DEV) and has the same sort methods, but does not have the full text of modified sections or clauses.
- *CS_OBJ_DEV_3:* Content Deviation by Contract: This view has the same information as the Content Deviation report (CS_OBJ_DEV) 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.

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.

Library SetID Select a library setID.

Incl Add/Del Library Content(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.

Clause or Section 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 *Section*, the Class Name and Approval Type fields are not available.

Class Name 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.

Approval Type 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.

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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.

See Also

Appendix D, "PeopleSoft Supplier Contract Management Reports," Contract Content Deviations (CS_OBJ_DEV), page 758

Creating Unused Contract Content Reports

Access the Unused Content page (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.

See Also

Appendix D, "PeopleSoft Supplier Contract Management Reports," Unused Contract Content CS_OBJ_UNUSE, page 760

Creating Contract Content Usage Reports

Access the Content Usage page (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.

See Also

Appendix D, "PeopleSoft Supplier Contract Management Reports," Contract Content Usage (CS_OBJ_USAGE), page 759

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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 (POY1050): Lists all the master voucher contracts for a specified setID.
- Recurring Voucher Contracts (POY1051): Lists all the voucher contracts for a specified setID with contract header and distribution information.
- Recurring Voucher Contract Details (POY1052): Lists recurring voucher contract details by setID and contract ID.
- Order Contracts (POCNT100): Lists all the vendor contracts based on selection criteria you enter on the Order Contracts page.
- Internal Order Contracts (POCNT200): Lists all internal contracts based on selection criteria you enter on the Internal Contract Report page. You can view item usage by category, by vendor, and by contract.
- Order Contract Releases (POY3010 – business unit) (POY3020 – setID): Lists order contract releases based business unit or setID.
- Non-Contracted Items (POCNT300): 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 (POCNT400): Lists, by vendor/category or category/vendor, contracts that are scheduled to expire within a selected date range.
- Activities Report (POY3031): Lists activities against contracts within a specified setID.

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Chapter 16

Configuring PeopleSoft Approval Framework for Use with Supplier Contract Management

This chapter provides an overview of PeopleSoft Supplier Contract Management workflow and discusses how to:

- Establish processes for approval framework.
- Maintain user list definitions.
- Define the transaction registry.
- Define generic templates.
- Set up event escalations and notifications.
- Define self-approval criteria.

See Also

Approval Framework, "Understanding the Approval Framework"

Understanding PeopleSoft Supplier Contract Management Workflow

This section discusses:

- Workflow in PeopleSoft Supplier Contract Management.
- PeopleSoft Approval Framework process.
- Approval framework users.
- Setup steps for PeopleSoft Approval Framework.
- Approval setup and transaction tables.

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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 *Enterprise PeopleTools PeopleBook: 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.

See *PeopleSoft Enterprise FSCM 9.1 PeopleBook: Approval Framework*

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:

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Formal Approvals (Approval Framework)	*Collaboration (PeopleSoft Standard Workflow Notifications)*	*Signature Routings*	*User Preferences and Authorizations Related to Approvals*
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. • Clause approvals. • Document approvals.	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. 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. 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.	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. 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. 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. 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.	The Bypass Approval 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. Users who are enabled to change the status (not workflow controlled) of sections and document configurators can manually mark them as Approved. You use a combination of a configurable approval authority that is defined using user preferences and an Approval check box on the definition page for process section and template approvals. The definitions are approved only once by an authorized user. When using digital signature capability, you can also capture electronic signatures during the approval process. See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up Digital Signatures, page 215. 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

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Formal Approvals (Approval Framework)	*Collaboration (PeopleSoft Standard Workflow Notifications)*	*Signature Routings*	*User Preferences and Authorizations Related to Approvals*
			must still be listed in the internal signer list to be enabled to sign the document during that user's approval step.

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 or deny the clause.

See *Approval Framework*, "Understanding the Approval Framework."

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 or deny documents.
- Approve or deny 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.

See Also

Approval Framework, "Understanding the Approval Framework"

Approval Framework Users

The workflow process that is used by approval framework is designed for users with different responsibilities in an organization. Participants include:

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- 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 or deny clauses.
  - Add comments and ad hoc approvers.
  - Approve or deny clauses, contracts, or other documents.

Setup Steps for PeopleSoft Approval Framework

Before you can send documents for review:

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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 Chapter 2, "Understanding PeopleSoft Supplier Contract Management," Supplier Contract Sample Permission Lists, Roles, and Users, page 22.

   - 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, 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.

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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.

   See Chapter 17, "Approving Documents and Document Components," page 649.

Approval Setup and Transaction Tables

Basic tables to set up PeopleSoft Supplier Contract Management include:

Table	*Description*
INSTALLATION_CS	Installation settings for Supplier Contracts - Collaboration email template

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Table	Description
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:

Table	Description
CS_DOC_HDR	Document Header: Fields in the document header can be commonly accessed for approval process criteria.
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

This section discusses how to:

- Define details for approval processes.
- Define alert criteria for approval workflows.
- Set up approval workflow paths.

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- Define steps for document approval workflows.

Pages Used to Establish Processes for Approval Framework

Page Name	*Definition Name*	*Navigation*	*Usage*
Approval Process Definition	EOAW_PRCS_MAIN	Supplier Contracts, Supplier Contracts Setup, Approvals, Approval Process Setup	Define basic approval process details and approval workflow process stages.
Criteria Definition	EOAW_CRITERIA	Click the Alert Criteria link on the Approval Process Definition page.	Define alert criteria for approval workflows.
Approval Path Definition	EOAW_PATH_SEC	Click the Path Details link on the Approval Process Definition page.	Set up approval workflow paths.
Approval Step Definition	EOAW_STEP_SEC	Click the Details link in the Steps grid on the Approval Process Definition page.	Define steps for contract approval workflows.

Defining Details for Approval Processes

Access the Approval Process Definition page (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.

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.

See Also

Approval Framework, "Setting Up Approval Framework Process Definitions"

Defining Alert Criteria for Approval Workflows

Access the Criteria Definition page (click the Alert Criteria link on the Approval Process Definition page).

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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.

Setting Up Approval Workflow Paths

Access the Approval Path Definition page (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 or deny a pending request.

Defining Steps for Document Approval Workflows

Access the Approval Step Definition page (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.

Maintaining User List Definitions

This section discusses how to define user lists.

Page Used to Maintain User List Definitions

Page Name	*Definition Name*	*Navigation*	*Usage*
User List Definition	EOAW_USER_LIST	Supplier Contracts, Supplier Contract Setup, Approvals, User List Setup	Define user lists.

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Defining User Lists

Access the User List Definition page (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 *Approval Framework*, "Defining Notification Templates and Users for Approval Framework."

Defining the Transaction Registry

This section discusses how to register the approval transaction.

Page Used to Define the Transaction Registry

Page Name	*Definition Name*	*Navigation*	*Usage*
Transaction Registry	EOAW_TXN	Enterprise Components, Approvals, Transaction Registry	Register the approval transaction. The transaction definition is the metadata that describes the transaction makeup to approval framework.

Registering the Approval Transaction

Access the Transaction Registry page (Enterprise Components, Approvals, Transaction Registry).

Use this page 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.

See Also

Approval Framework, "Defining the Approval Transaction Registry"

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Defining Generic Templates

This section discusses how to enter generic template definitions.

Pages Used to Define Generic Templates

Page Name	*Definition Name*	*Navigation*	*Usage*
Generic Template Definition	WL_TEMPLATE_GEN	Supplier Contracts, Supplier Contract Setup, Approvals, Generic Templates	Enter generic template definitions.

Entering Generic Template Definitions

Access the Generic Template Definition page (Supplier Contracts, Supplier Contract Setup, Approvals, Generic Templates).

You use generic templates to establish common formats for ad hoc notifications.

See *Approval Framework*, "Defining Notification Templates and Users for Approval Framework."

Setting Up Event Escalations and Notifications

This section provides an overview of event escalations and notifications and lists the pages that are used to set up event escalations and notifications.

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 or denying a document.

See *Approval Framework*, "Using the Notification and Escalation Manager."

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Pages Used to Set Up Event Escalations and Notifications

Page Name	Definition Name	Navigation	Usage
Events	EOAW_NEM_EVENTS	Enterprise Components, Approvals, Notifications and Escalations, 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	EOAW_NEM_SETUP	Enterprise Components, Approvals, Notifications and Escalations	Specify the conditions for which the event should check and the actions that the system should take when the notification conditions are met.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler

Approval Framework, "Using the Notification and Escalation Manager," Setting Up an Escalation Event

Defining Self-Approval Criteria

This section discusses how to set up self-approval criteria.

Page Used to Define Self-Approval Criteria

Page Name	Definition Name	Navigation	Usage
Criteria Definition	EOAW_CRITERIA	Supplier Contracts, Supplier Contracts Setup, Approvals, Approval Process Setup Click the Criteria link in the Paths grid on the Setup Process Definitions page	Set up self-approval criteria. See *Approval Framework,* "Setting Up Approval Framework Process Definitions."

Setting Up Self-Approval Criteria

Access the Criteria Definition page (Supplier Contracts, Supplier Contracts Setup, Approvals, Approval Process Setup, and click the Criteria link in the Paths grid on the Setup Process Definitions page).

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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 *Approval Framework*, "Setting Up Approval Framework Process Definitions," Defining Criteria for Approval Framework Processes.

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Chapter 17

Approving Documents and Document Components

This chapter provides an overview of document approvals and discusses how to:

- Define user preferences and installation options for internal document approvals.
- Approve clauses.
- Approve sections and control document configurator availability.
- Approve documents.

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 previous chapter.

See Also

Chapter 16, "Configuring PeopleSoft Approval Framework for Use with Supplier Contract Management," page 635

Enterprises Components: PeopleSoft Approval Framework 9.1 PeopleBook

Understanding Document Approvals

This section discusses 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.

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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 Chapter 9, "Managing the Contract Library," Life Cycle Options, page 360.

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.

See Chapter 13, "Managing Document Life Cycles," Sending Documents to Internal and External Contacts, page 558.

Defining User Preferences and Installation Options for Document Approvals

This section discusses how to:

- Set up user preferences for document approvals.
- Define installation options for document approvals.

Pages Used to Define User Preferences and Installation Options for Document Approvals

Page Name	*Definition Name*	*Navigation*	*Usage*
User Preferences	OPR_DEF_TABLE_CS	Supplier Contracts, Supplier Contracts Setup, Define User Preferences	s Set up user preferences for document approvals.
Installation Options	INSTALLATION_CS	Supplier Contracts, Supplier Contracts Setup, Installation Options	Define installation options for document approvals.

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Setting Up User Preferences for Document Approvals

Access the User Preferences page (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.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up User Preferences, page 266

Defining Installation Options for Document Approvals

Access the Installation Options page (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.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Installation Options for PeopleSoft Supplier Contract Management, page 223

Approving Clauses

This section provides an overview of clause approval and discusses how to:

- Set up installation options for clause approval.
- Access clauses for approval.
- Preview and submit clauses for approval.
- Update and submit clauses for approval.

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- Approve and deny clauses.
- Set effective dates for clauses.

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.

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.

See Chapter 16, "Configuring PeopleSoft Approval Framework for Use with Supplier Contract Management," Establishing Processes for Approval Framework, page 642.

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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.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining User Preferences, page 267.

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 and Deny 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.

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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.

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 Chapter 16, "Configuring PeopleSoft Approval Framework for Use with Supplier Contract Management," Understanding PeopleSoft Supplier Contract Management Workflow, page 635.

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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Installation Options for PeopleSoft Supplier Contract Management, page 223.

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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 Defaultcheck 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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Establishing Clause Classes, page 246.

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.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up Approval Types, page 243

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Pages Used to Approve Clauses

Page Name	*Definition Name*	*Navigation*	*Usage*
Installation Options	INSTALLATION_CS	Supplier Contracts, Supplier Contracts Setup, Installation Options	Set up installation options for clause approval.
Clause Definition	CS_CLAUSE_DEFN	Click the Worklist link on the Home page and select *Approval Routing* in the Work List Filters field.	Access clauses for approval.
Clause Approval Status	CS_CLS_APPROVAL	Click the Preview Approval button on the Clause Definition page. Click the Submit for Approval button on the Clause Definition page.	Preview and submit clauses for approval. This feature is only available when installation options require that clauses must be approved.

Setting Up Installation Options for Clause Approval

Access the Installation Options page (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

Access the Clause Definition page (Supplier Contracts, Manage Contract Library, Clauses).

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 the Approving and Denying Clauses section.

See Chapter 17, "Approving Documents and Document Components," Approving and Denying Clauses, page 659.

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:

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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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining User Preferences, page 267

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 and Deny buttons for the approver to select from.

Preview Approvals 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.

Submit Approvals 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

Access the Clause Approval Status page (click the Preview Approval button on the Clause Definition page or click the Submit for Approval button on the Clause Definition page).

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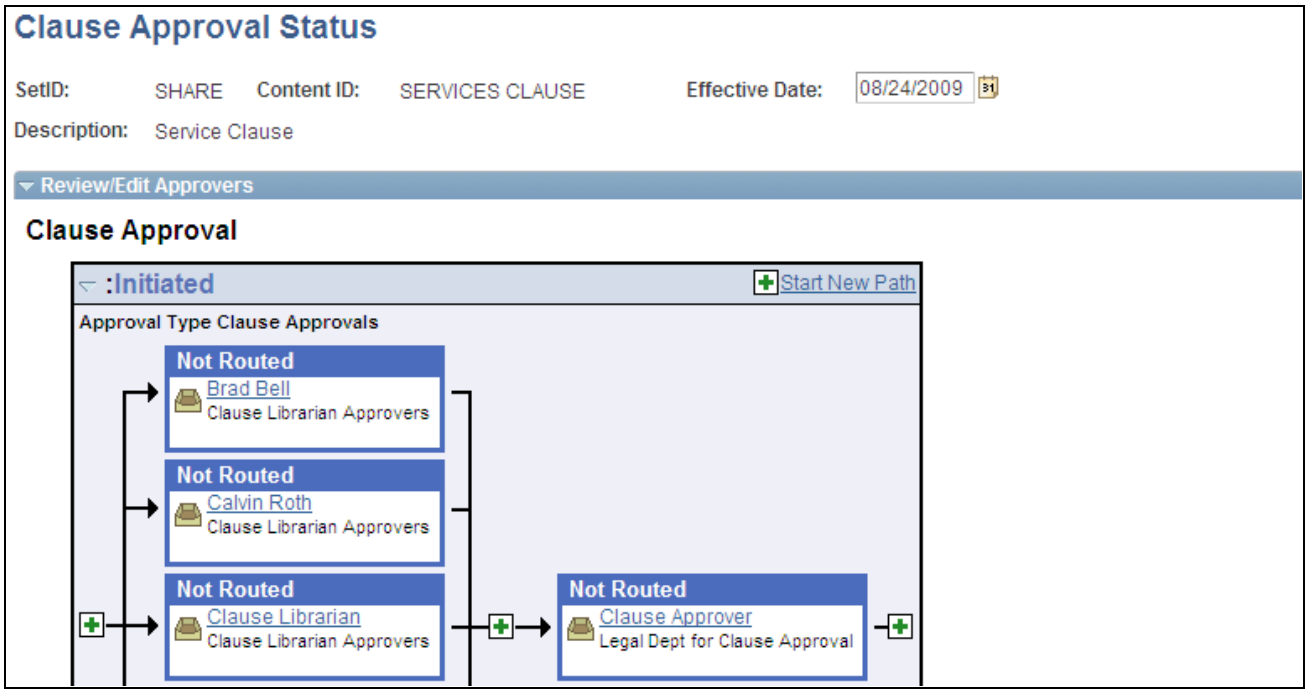
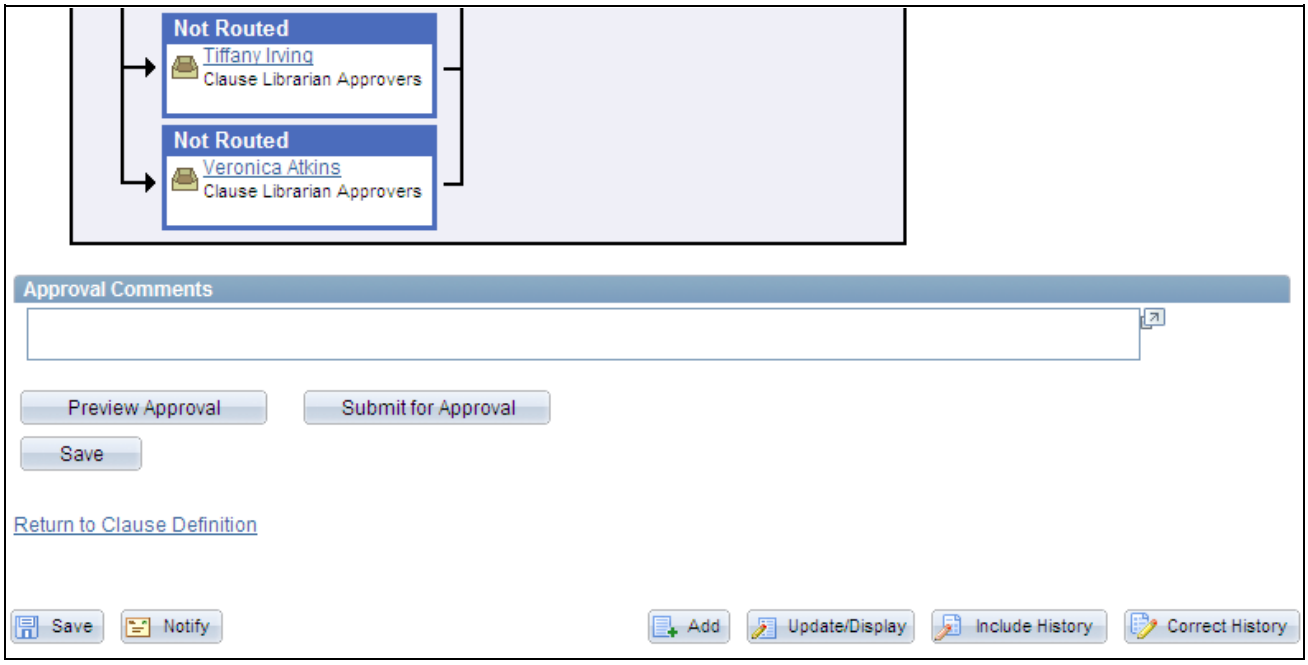


Clause Approval Status page (1 of 2)



Clause Approval Status page (2 of 2)

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.

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Updating and Submitting Clauses for Approval

Access the Clause Approval Status page (click the Submit for Approval button on the Clause Definition page).

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 and Denying Clauses

Access the Clause Definition page (click the Worklist link on the Home page and select *Approval Routing* in the Work List Filters field).

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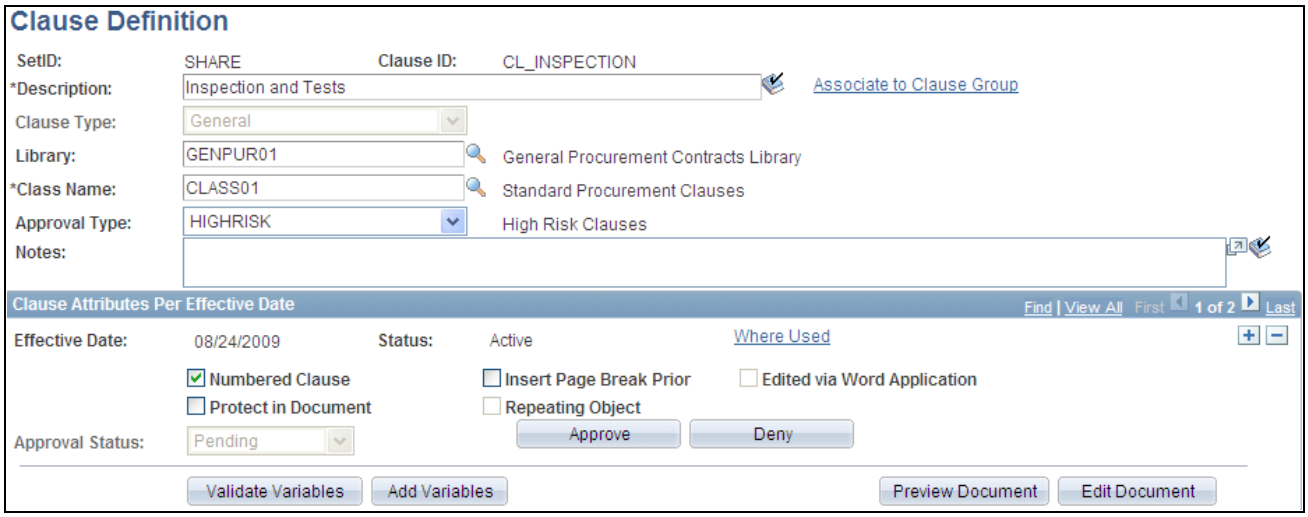
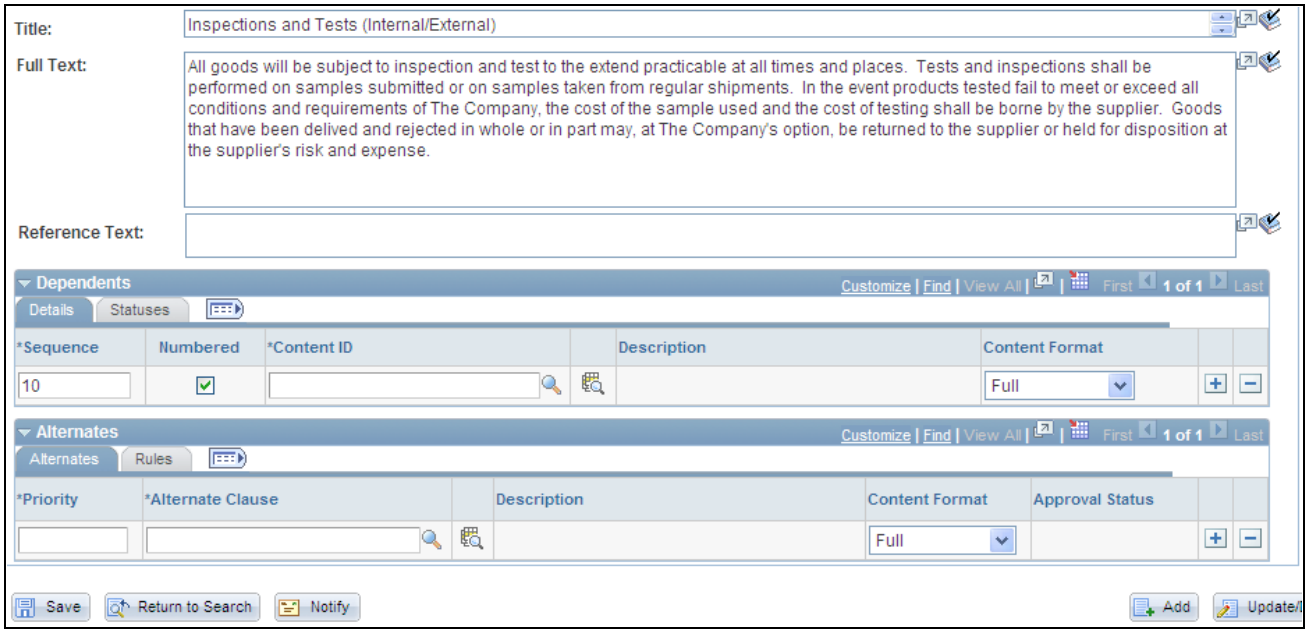


Clause Definition page (1 of 2)



Clause Definition page (2 of 2)

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 and Deny 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.

2. Enter any comments you have concerning the clause.

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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

Access the Clause Definition page (Supplier Contracts, Manage Contract Library, Clauses).

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 don't 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 Sections and Controlling Document Configurator Availability

This section provides an overview of section and configurator approvals and discusses how to:

- Set section and configurator user preferences.
- Defining section approvals.
- Control document configurator availability.

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.

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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.

Pages Used to Approve Sections and Control Document Configurator Availability

Page Name	*Definition Name*	*Navigation*	*Usage*
User Preferences	OPR_DEF_TABLE_CS	Supplier Contracts, Supplier Contracts Setup, Define User Preferences, Supplier Contract Management	Set section and configurator user preferences.
Section Definition	CS_SECTION_DEFN	Supplier Contracts, Manage Contract Library, Sections	Define section approvals.
Document Configurator Definition	CS_TMPL_TBL	Supplier Contracts, Manage Contract Library, Document Configurators	Control document configurator availability.

Setting Section and Configurator User Preferences

Access the User Preferences page (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.

Click the Approve Sections check box to give the authority for the manager to approve document sections.

Click the Change Configurator Status check box to give the authority for the manager to change the availability of a document configurator.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up User Preferences, page 266

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Defining Section Approvals

Access the Section Definition page (Supplier Contracts, Manage Contract Library, Sections).

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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining User Preferences, page 267

Initial: Select to indicate the section is not ready for use. This is the default setting when you create or make changes to the section.

Pending: Select to indicate the section is not available for use. Use this setting for example if others are reviewing the section.

Controlling Document Configurator Availability

Access the Document Configurator Definition page (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.

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Approving Documents

This section provides an overview of document approvals and discusses how to:

- Access document approval and review components.
- Preview approvals.
- Submit documents for approval.
- Approve and review documents.
- Verifying document approvals.
- Deny approval for documents.
- Insert ad hoc approvers and reviewers.
- Bypass document approvals.

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 or denied 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 Chapter 16, "Configuring PeopleSoft Approval Framework for Use with Supplier Contract Management," page 635.

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 or deny transactions and assign ad hoc reviewers or approvers for the transaction. When the approval process is complete, the system updates the document as approved or rejected. 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 Chapter 17, "Approving Documents and Document Components," Understanding Clause Approval, page 652.

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.

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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 Chapter 9, "Managing the Contract Library," Life Cycle Options, page 360.

See Chapter 13, "Managing Document Life Cycles," Sending Documents to Internal and External Contacts, page 558.

Note. External users can also digitally sign contract documents.

See Chapter 6, "Maintaining Supply-Side Documents and Deliverables," Signing External Documents, page 144.

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.

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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 and Deny 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.

Pages Used to Approve Documents

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Management	CS_DOC_MAINT	• 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	Access document approval and review components.
Document Approval Status	CS_DOC_APPROVAL	Click the Preview Approvals button on the Document Management page.	Preview approvals.
Document Approval Status	CS_DOC_APPROVAL	Click the Submit for Approval button on the Document Management page.	Submit documents for approval.

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Page Name	Definition Name	Navigation	Usage
Document Management	CS_DOC_APPROVAL	Click the Worklist link on the Document Management page. Click the document link on the Worklist page.	Approve and review documents.

Accessing Document Approval and Review Components

Access the Document Management page (Supplier Contracts, Create Contracts and Documents, Contract Entry, and click the Maintain Document button on the Contract page.

Document Management page

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.

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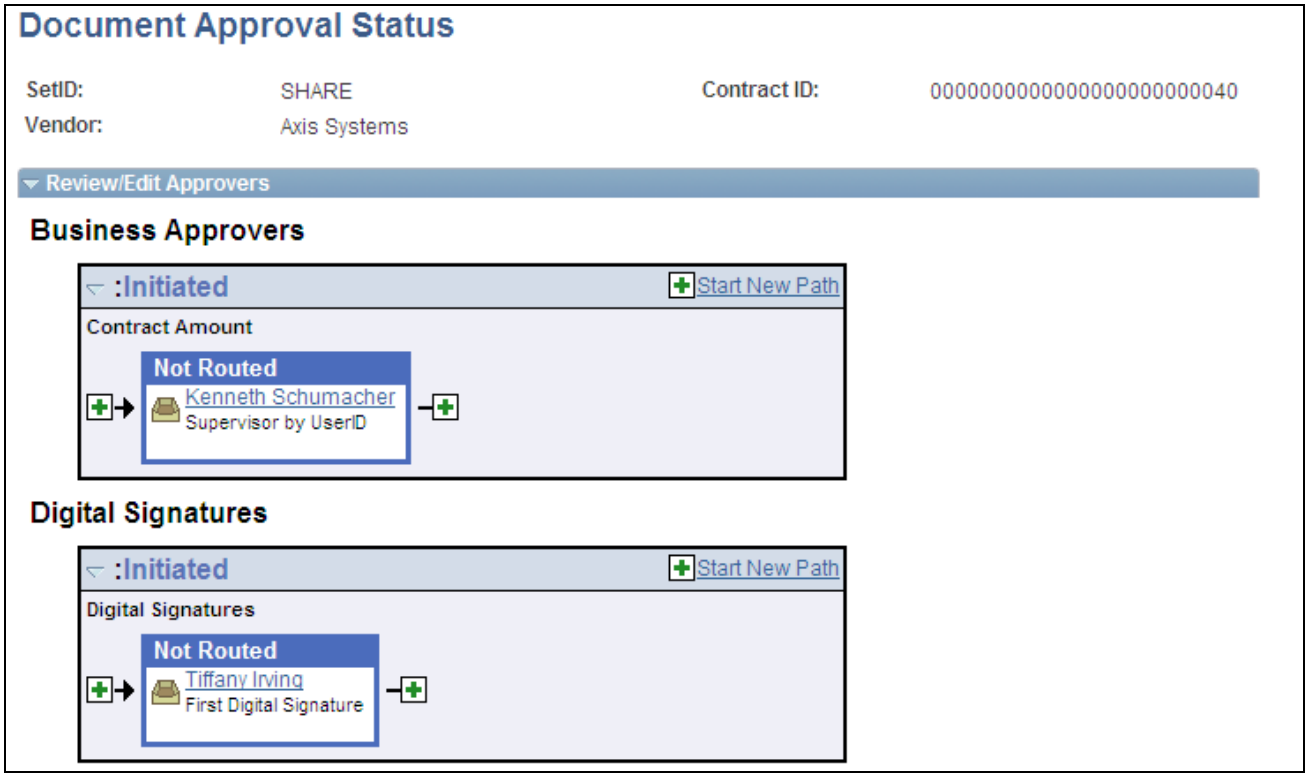
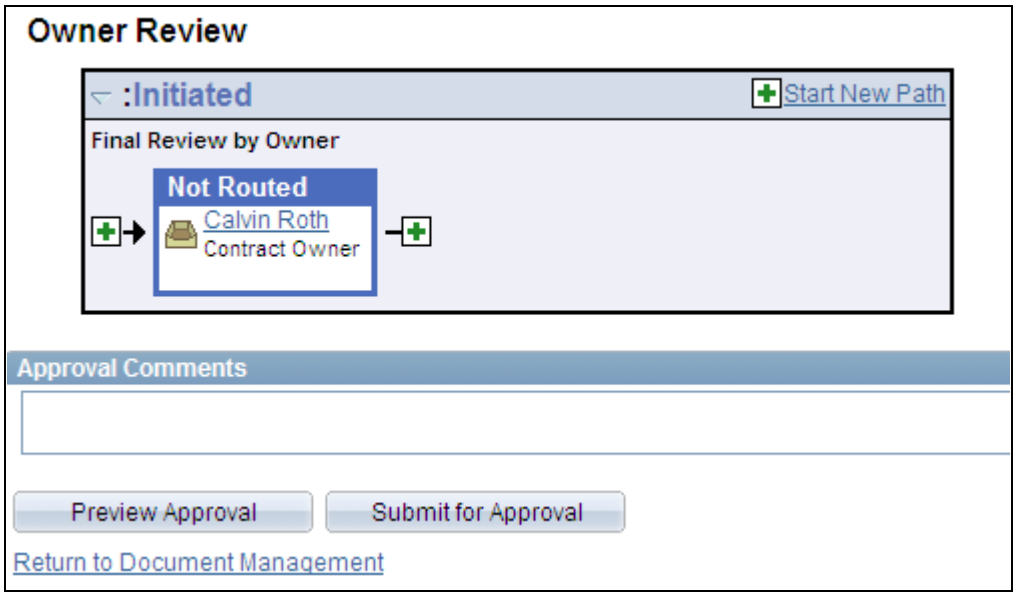
Previewing Approvals

Access the Document Approval Status page (click the Preview Approvals button on the Document Management page).



Document Approval Status page (1 of 2)



Document Approval Status page

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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.

Preview Approval Select to view a list of approvers based on the approval process definition.

Submit for Approval 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:

- Review approvers and reviewers.
- Review approval process stages and paths.
- Make comments about the document before continuing the approval process.
- Add approvers and reviewers.
- Start new approval paths.
- Cancel the approval process.

See Chapter 17, "Approving Documents and Document Components," Submitting Documents for Approval, page 669.

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

Access the Document Approval Status page (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.

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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.

Start New Path 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.

Note. 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.

Multiple Approvers 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.

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Cancel Approval Process

Select to stop the approval process. This feature provides you an opportunity to:

- Review approvers and reviewers.
- Review approval process stages and paths.
- Make comments about the document before continuing the approval process.

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.

Save

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

Access the Document Management page (click the Worklist link on the Document Management page, and click the document link on the Worklist page).

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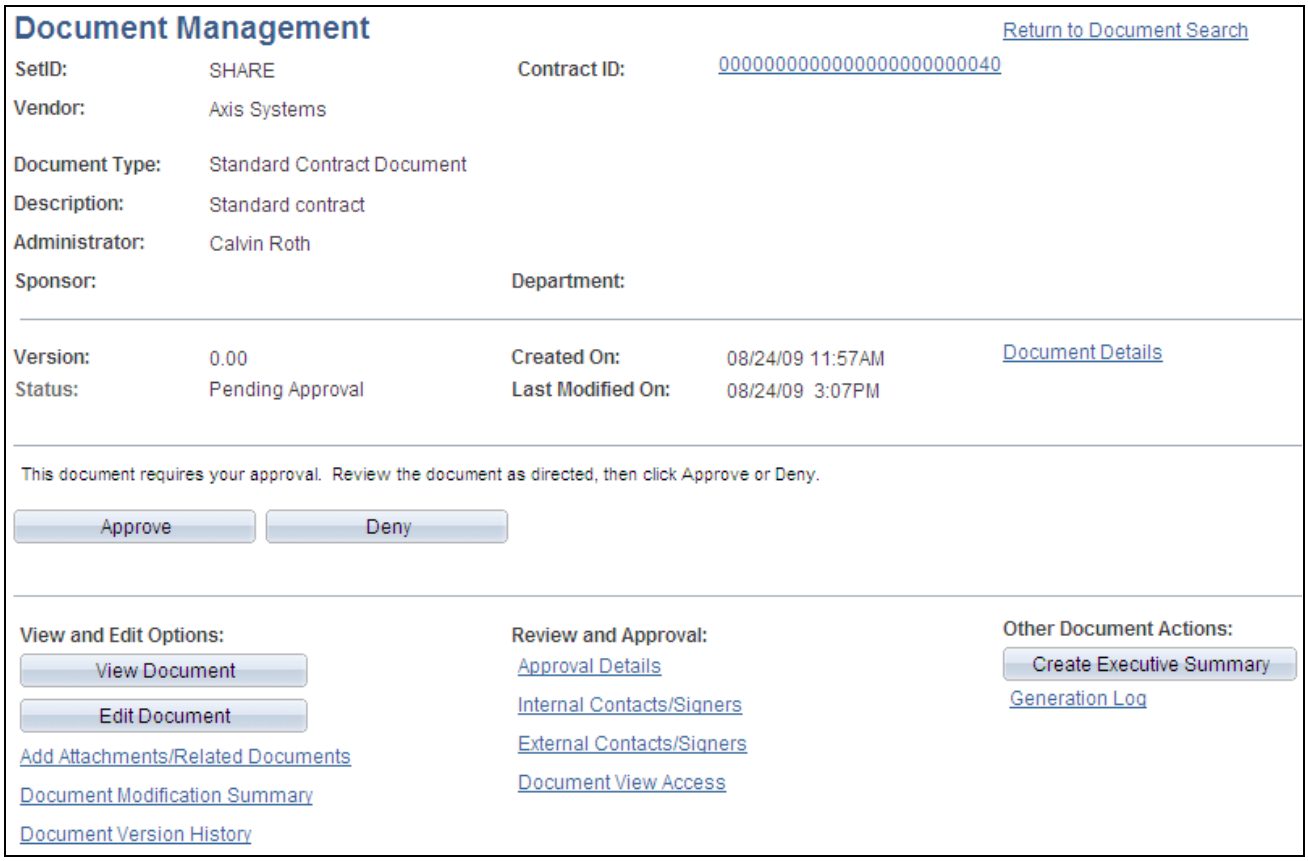

Document Management page for approving documents

Approvers and reviewers use this page to review, edit, approve, and deny 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.

Outline Number 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.

Clause ID Displays the clause identifier.

Title Displays the title assigned to the clause.

Function buttons on the Document Management page are:

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Approve	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.
Deny	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.

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 and Deny 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

Access the Document Approval Status page (click the Submit for Approval button on the Document Management page).

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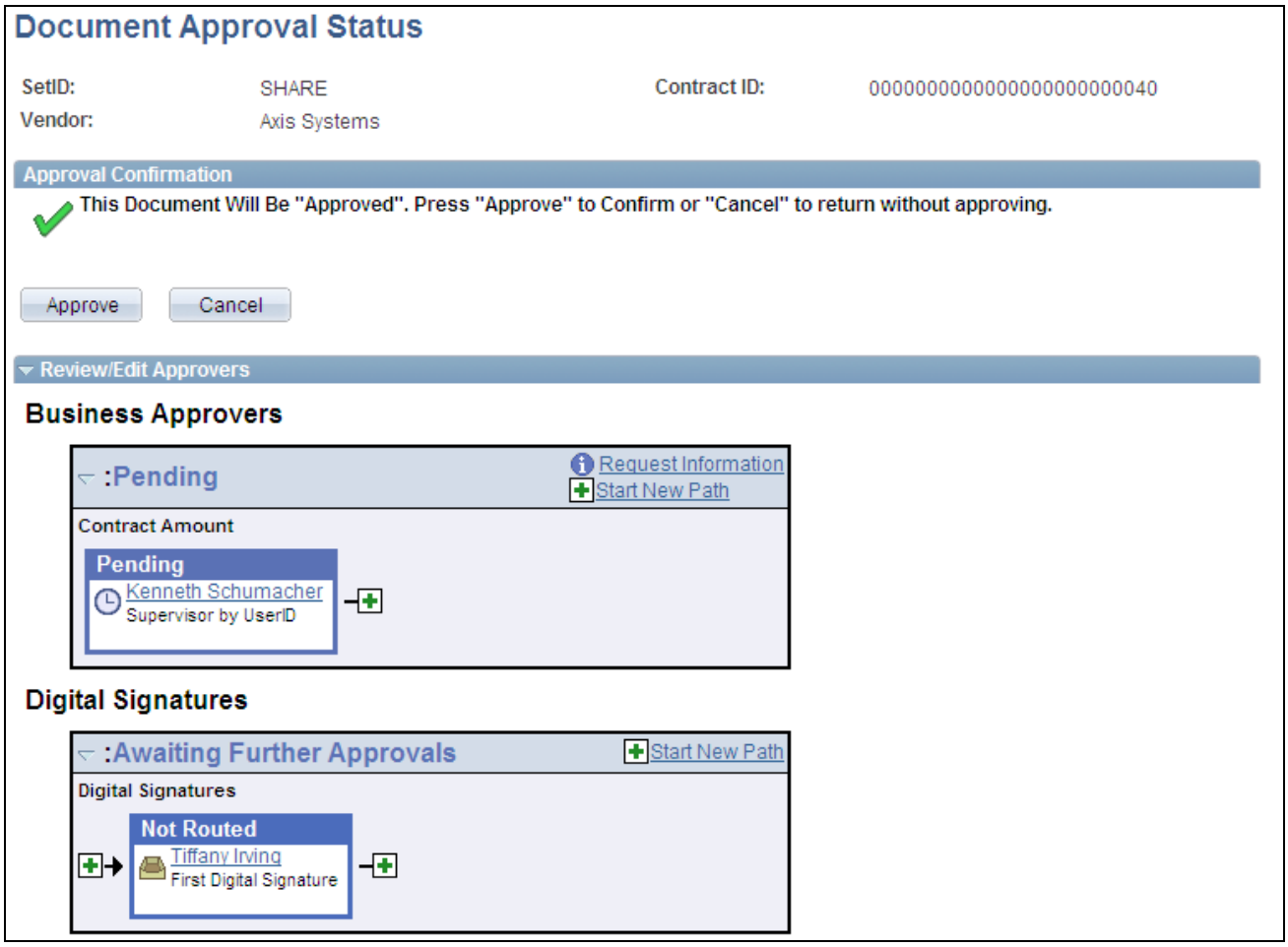

Document Approval Status page (1 of 2)

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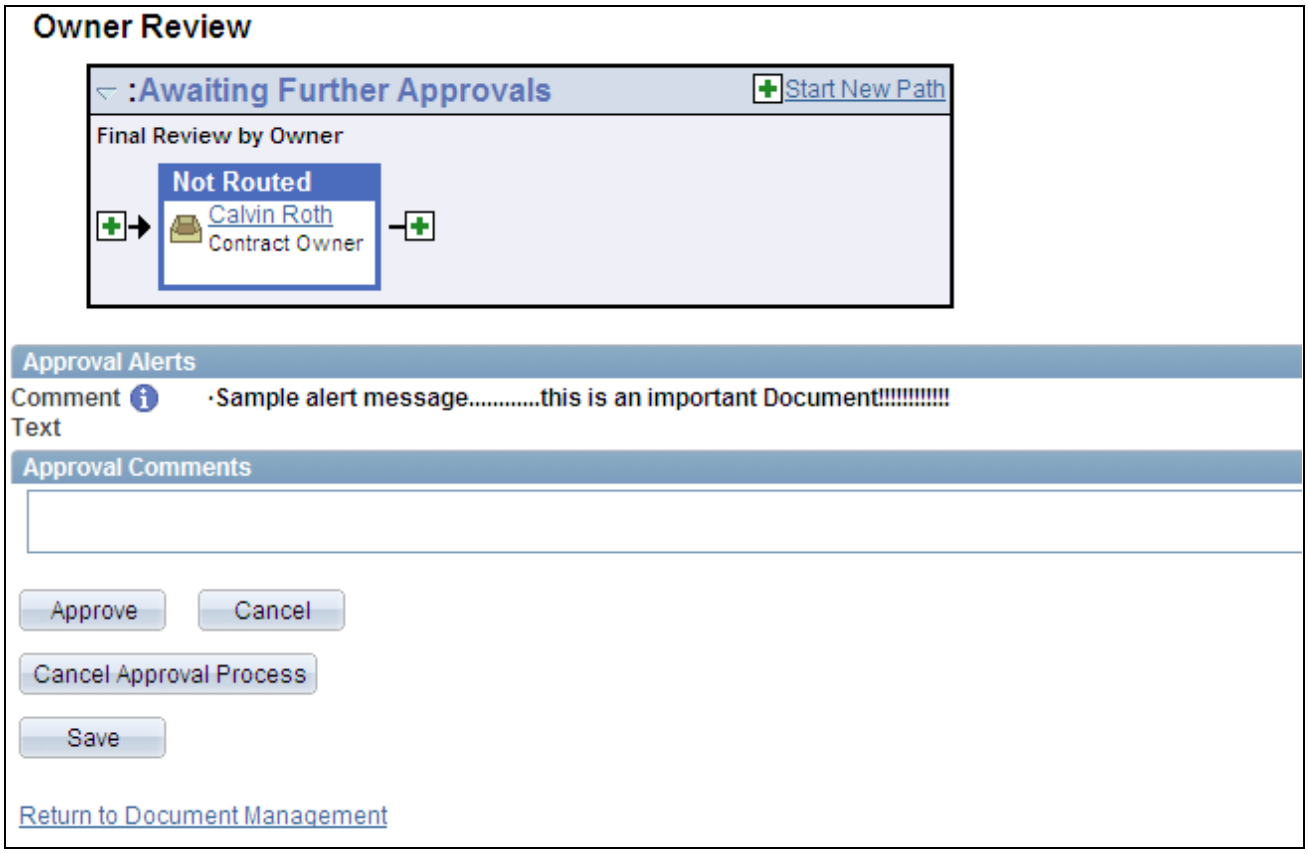

Document Approval Status page (2 of 2)

This page appears when you click the Approve or Deny 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 or deny 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

Access the Document Approval Status page (click the Worklist link on the Document Management page, and click the document link on the Worklist page).

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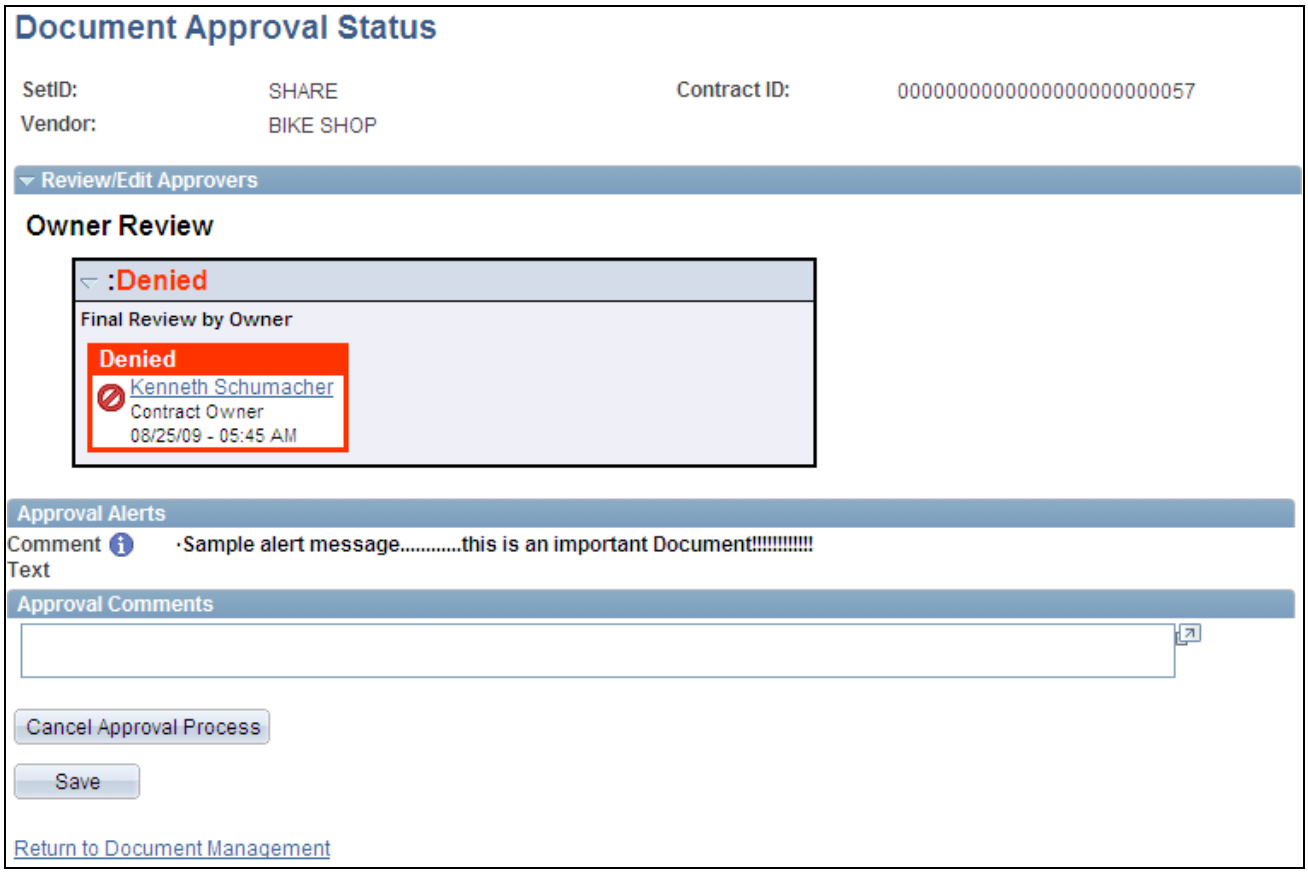

Document Approval Status page

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 requisition, 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:

   - Leaves the document status as *Pending Approval*.

     The event handler calls the OnHeaderDeny class, which resets the status to *Pending Approval*. 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.

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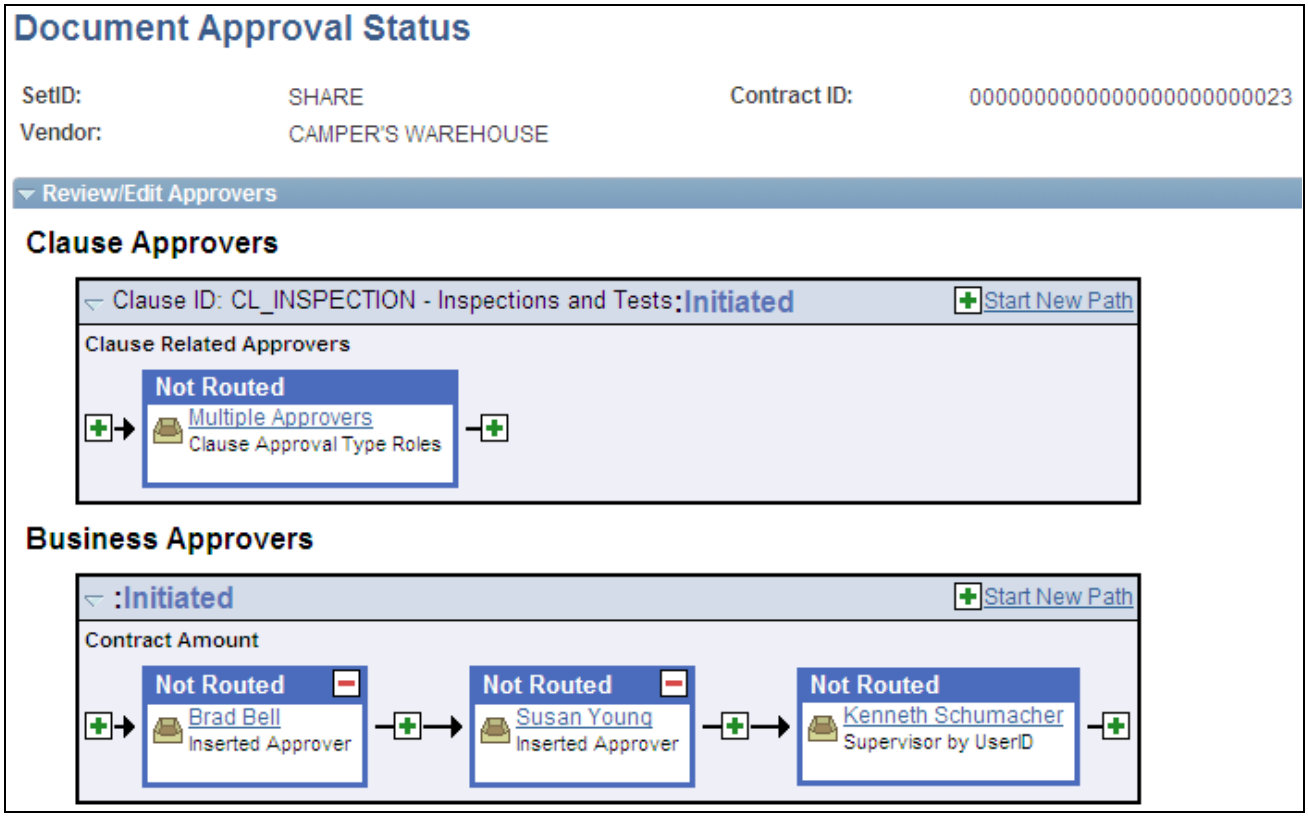
3. The document owner uses the Review/Edit Approvers section to review comments for the denial.

Inserting Ad Hoc Approvers and Reviewers

Access the Document Approval Status page (click the Submit for Approval button on the Document Management page).



Document Approval Status page with inserted approvers

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.

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Bypassing Document Approvals

Access the Document Management page(click the Bypass Approvals button 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.

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Chapter 18

Creating and Maintaining Amendments for Supplier Contracts

This chapter provides overviews of contract document amendments, amendments linked to source transactions, and imported amendments, and discusses how to:

- Set up system values for amendments.
- Create document amendments.
- Process contract document amendments.

Understanding Contract Document Amendments

This section discusses:

- 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 example illustrates when in the document life cycle that you can create and complete amendment processing:

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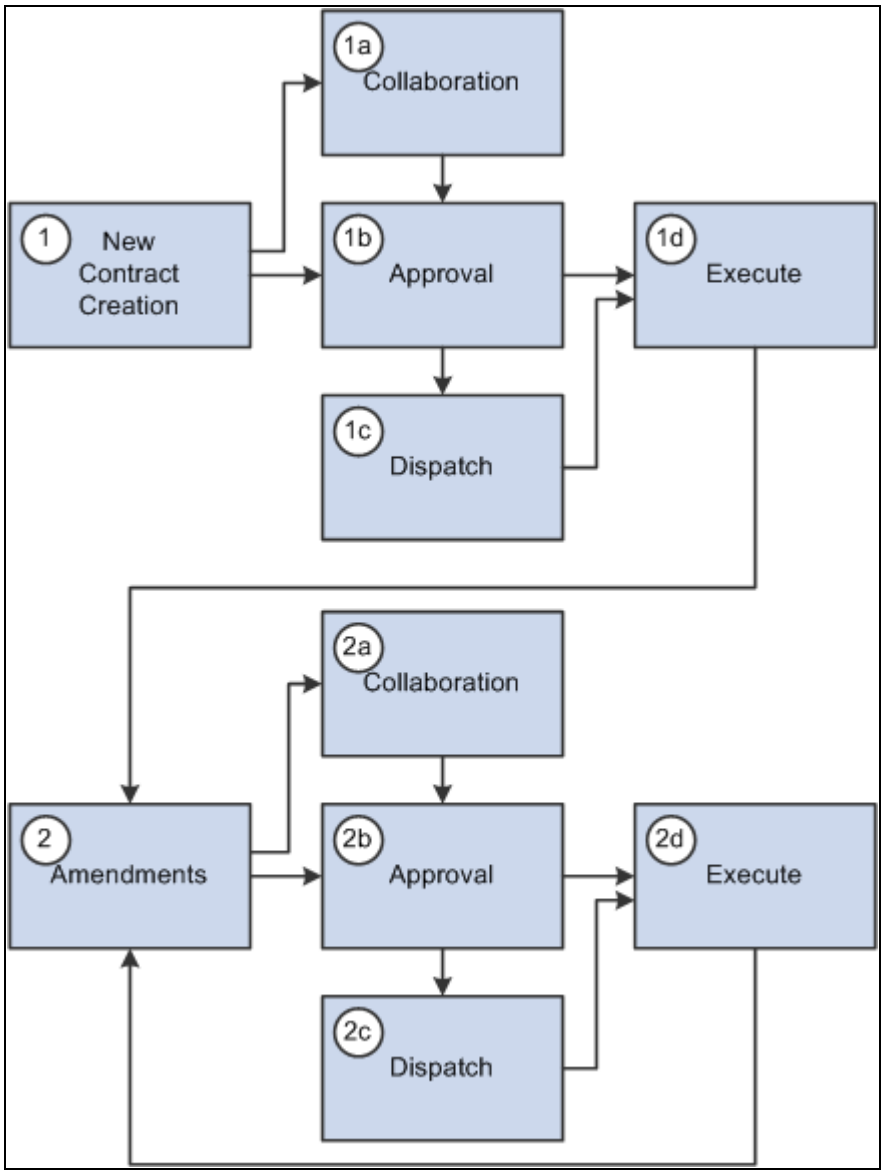

Amendment flow example

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.

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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.

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 2003 .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 Chapter 11, "Importing Clauses, Sections, and Documents," Importing Amended Contracts, page 432.

See Chapter 11, "Importing Clauses, Sections, and Documents," Importing Amended Contracts and Amendments, page 434.

See Chapter 11, "Importing Clauses, Sections, and Documents," Importing Original Contracts and Amendment Files, page 436.

This example describes all of the amendment processes that you can use to create an amendment:

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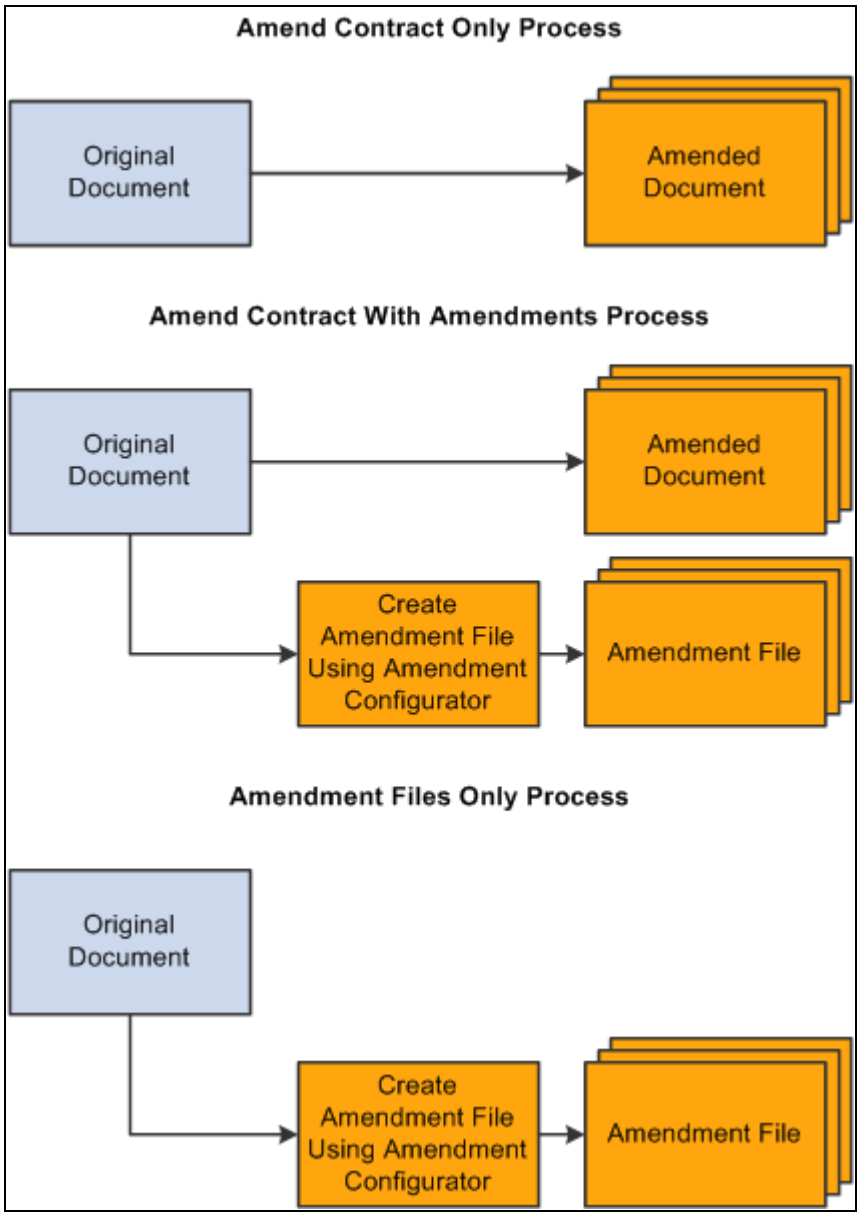

Amendment process option types

See Also

Chapter 13, "Managing Document Life Cycles," Understanding Document Life Cycles, page 464

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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 example illustrates the processing when you use the Amend Contract Only process option:

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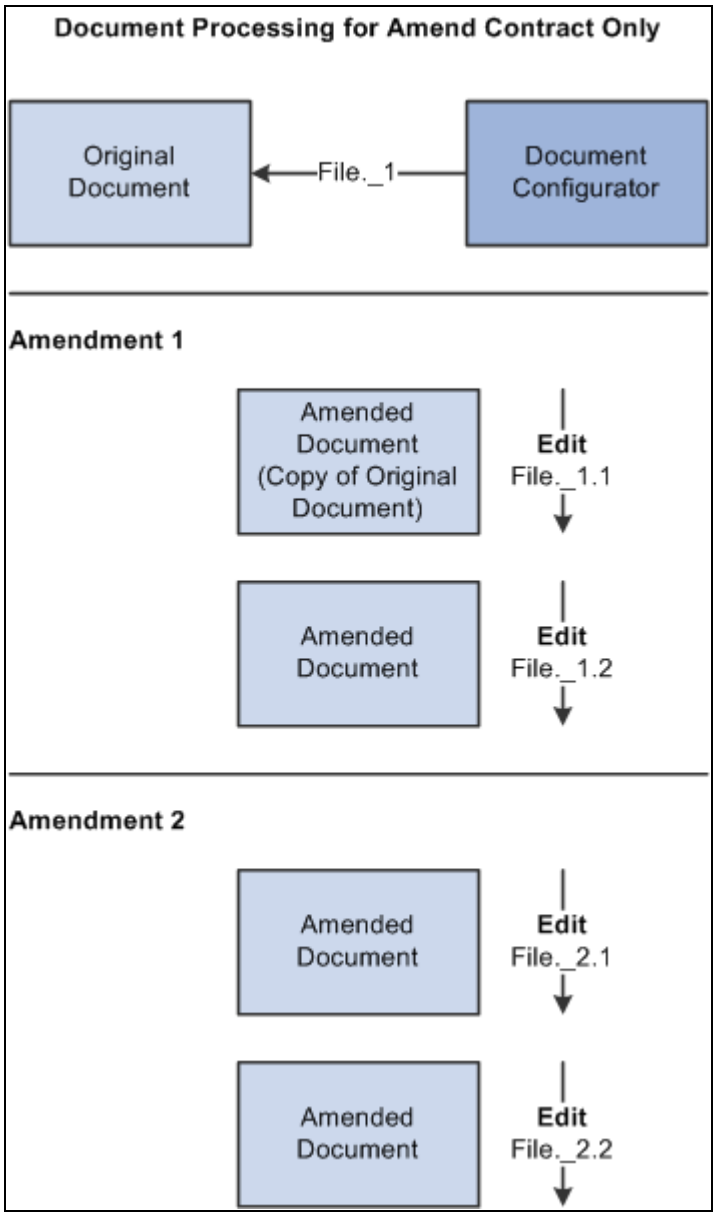

Example of Amend Contract Only processing

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.

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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 next example illustrates document processing for the Amend Contract with Amendments process option:

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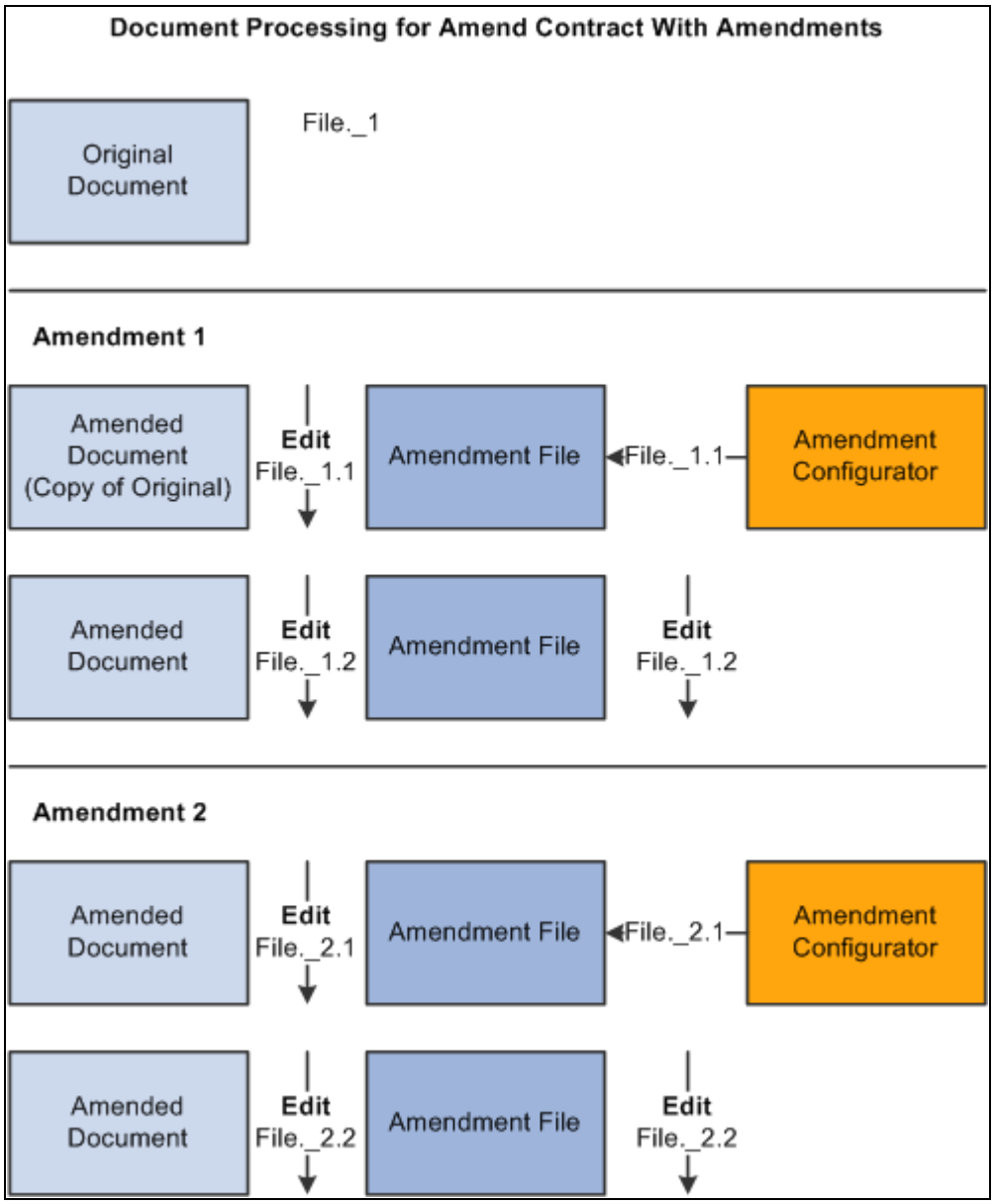

Example of Amend Contract with Amendments process

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.

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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.

The next example illustrates document processing for the Amendment Files Only process option:

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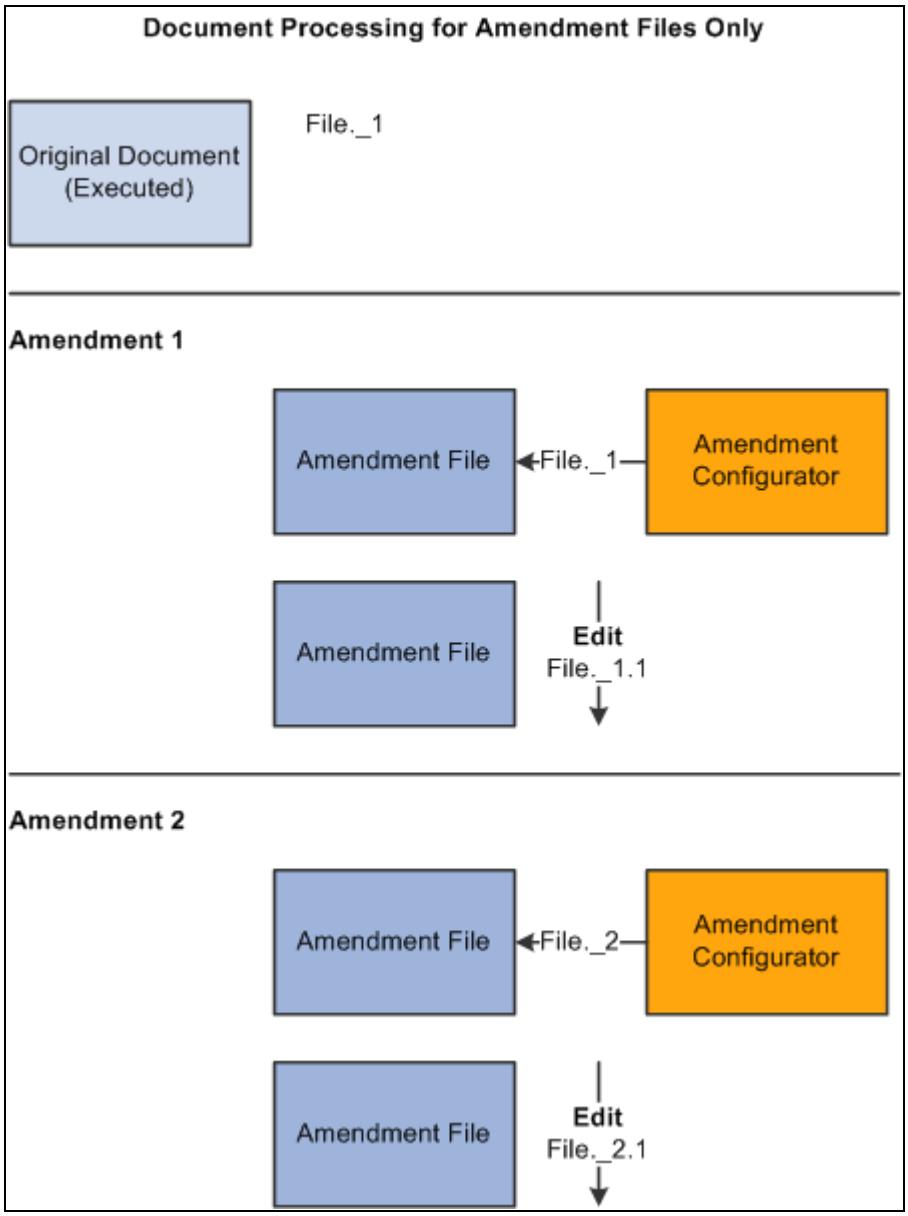

Example of Amendment Files Only process

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.

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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

This section discusses 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.

   ---

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 contact 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.

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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.

   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.

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.

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.

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.

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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 2003 .xml file format and requires that you define an amendment configurator.

See Also

Chapter 11, "Importing Clauses, Sections, and Documents," Importing Contract and Ad Hoc Documents, page 425

Understanding Amendments Linked to Source Transactions

This section 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:

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- 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 Chapter 13, "Managing Document Life Cycles," Refreshing and Re-creating Documents, page 514.

- 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.

See Also

Chapter 12, "Generating Microsoft Word Documents," Refreshing Microsoft Word Documents, page 451

Chapter 12, "Generating Microsoft Word Documents," Generating Microsoft Word Documents, page 445

Setting Up System Values for Amendments

This section discusses how to:

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- Define the format and options for amendments.
- Define amendment configurators.

Pages Used to Set Up System Values for Amendments

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Format and Options	CS_CONFIG	Supplier Contracts, Supplier Contracts Setup, Document Format and Options	Define the format and options for amendments.
User Preferences	CS_CONFIG	Supplier Contracts, Supplier Contracts Setup, Define User Preferences	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. See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up User Preferences, page 266.
Document Configurator Definition	CS_TMPL_TBL	Supplier Contracts, Manage Contract Library, Document Configurators	Define amendment configurators.

Defining the Format and Options for Amendments

Access the Document Format and Options page (Supplier Contracts, Supplier Contracts Setup, Document Format and Options).

Use this page to control the default processing for all core and amendment documents. The Word Template Name field controls the default Microsoft Word template value that the system uses for all document configurators. When defining a configurator, you can select the Use for Amendments only check box if you plan to use the configurator only with amendment files.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Default Settings for Document Formats and Options, page 255

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Defining Amendment Configurators

Access the Document Configurator Definition page (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.

Note. You cannot include contract wizards in amendment configurators. This option is disabled when you select the Use for Amendments only check box.

See Also

Chapter 9, "Managing the Contract Library," Defining Basic Configurator Information, page 339

Creating Document Amendments

This section discusses how to:

- Access amendment features.
- Create amendments.
- Update amendment files automatically.

Pages Used to Create Document Amendments

Page Name	*Definition Name*	*Navigation*	*Usage*
Document Management	CS_DOC_MAINT	Supplier Contracts, Create Contracts and Documents, Document Management	Access amendment features.
Create an Amended Version	CS_DOC_VERSIONS_SP	Click the Create Amendment button on the Document Management page.	Create amendments.

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Accessing Amendment Features

Access the Document Management page (Supplier Contracts, Create Contracts and Documents, Document Management).

After a document has been executed, it becomes eligible for creating amendments. You click the Create Amendment button to access the Create an Amended Version page. 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.

Creating Amendments

Access the Create an Amended Version page (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.

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Amendment Option

Select how you want to process the amendment. This field initially displays the format and option default value that you defined in the Amendment Creation Default 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.

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.

The system generates the document based on the amendment option. Amendment options are:

Amend Contract Only: Select to revise the contract and generate one amended document with all of the changes applied directly to the last executed contract.

Amend Contract with Amendments: 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.

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.

Note. 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.

Amendment Files Only: 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.

Amendment Configurator ID

Select a configurator on which to build a new amendment document. You can select a new configurator for each amendment cycle.

This field is available if you selected either the *Amend Contract with Amendments* or the *Amendment Files Only* value in the Amendment Option field.

An amendment configurator is one that has been built specifically for use with an amendment file. Any configurator that has the Use for Amendments only check box selected on the Document Configurator Definition page is available for selection in this field as long as its status is Available.

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Version Select the version level at which you want the system to record the amendment. Values are:

Reset Version back to 0.00: 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 Allow Check-In as Same Version check box on the Document Format and Options page.

Minor Version: 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.

Major Version: Select to indicate that this amendment is a major update.

Comments Comments are required when you create an amendment and are displayed on the Document History page.

See Also

Chapter 11, "Importing Clauses, Sections, and Documents," Importing Original Contracts and Amendment Files, page 436

Chapter 18, "Creating and Maintaining Amendments for Supplier Contracts," Amendment Processing, page 683

Updating Amendment Files Automatically

To use the automatic update feature for amendment files, access the Document Management page (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.

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- 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.

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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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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.

For more information about processing contract amendments, refer to the documentation for the corresponding function.

See Also

Chapter 13, "Managing Document Life Cycles," page 463

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Appendix A

Microsoft Word Integration with Supplier Contract Management

This appendix provides an overview of Microsoft Word integration with Supplier Contract Management and discusses:

- XML schema.
- Microsoft Word editing access.
- Microsoft Word search considerations.
- Supported Microsoft Word settings.
- Format and style considerations in Microsoft Word.
- Character limitations.
- Protected areas.
- Outline numbering.
- Spelling and grammar checks in Microsoft Word.
- Document comparison considerations.
- Document preview and edit differences.
- Document table of contents.
- Troubleshooting integration issues.

Understanding Microsoft Word Integration with Supplier Contract Management

Microsoft Office Word 2003 XML integration is a core requirement for using the PeopleSoft Supplier Contract Management document authoring system. To effectively use the system, you must have Microsoft Word Professional 2003 or Microsoft Professional 2007 to generate and edit Extensible Markup Language (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 2003 Professional or Microsoft Word 2007 using the 2003 xml compatible save format.

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Note. Make sure you are using the latest service pack of Microsoft Office Word 2003, at least SP1, and that the application is a part of Microsoft Office Professional Edition 2003. The Standard version of Microsoft Word 2003 is not sufficient for editing and maintaining PeopleSoft custom XML tags. You can also use Microsoft Word 2007 with Supplier Contract Management in which case you must use the Word 2003 XML compatible save format when interacting with the system, such as loading Microsoft Word templates and checking in documents. When you use Microsoft Word 2007, Supplier Contract Management still authors documents in the Word 2003 XML format which is supported by Word 2007. Some features specific to Microsoft Word 2007 may not be backward compatible with the Microsoft Word 2003 XML format. Check the Microsoft website for more details.

Microsoft Word, supports requirements through an XML schema named Microsoft Word Processing Markup Language (WordML). An XML schema defines the legal building blocks or elements of an XML document. Used with the web, XML provides a standard method for defining and exchanging structured information. An XML document consists primarily of tagged text that imposes a hierarchical, tree-like structure on the document.

The Supplier Contract Management system defines a common custom schema that you use for clauses, sections, configurators, and documents. This custom schema defines XML tag structures within the document content. For example, you can create a clause in PeopleSoft using the Clause Definition page. In the PeopleSoft Internet Architecture page, the clause object consists of fields such as Title,Full Text, and Reference Text. Each clause field has a corresponding XML tag. The content associated with the field is between the start and end of corresponding tag. The beginning and ending tag structure that surrounds the text enables the system to parse or read the XML file. This example illustrates the XML tags for a clause as visible within Microsoft Word.

Note. Typically, custom 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 XML tag structure within Microsoft Word.

This example from within Microsoft Word 2003 Professional illustrates how clause fields appear with their corresponding custom PeopleSoft XML tags:

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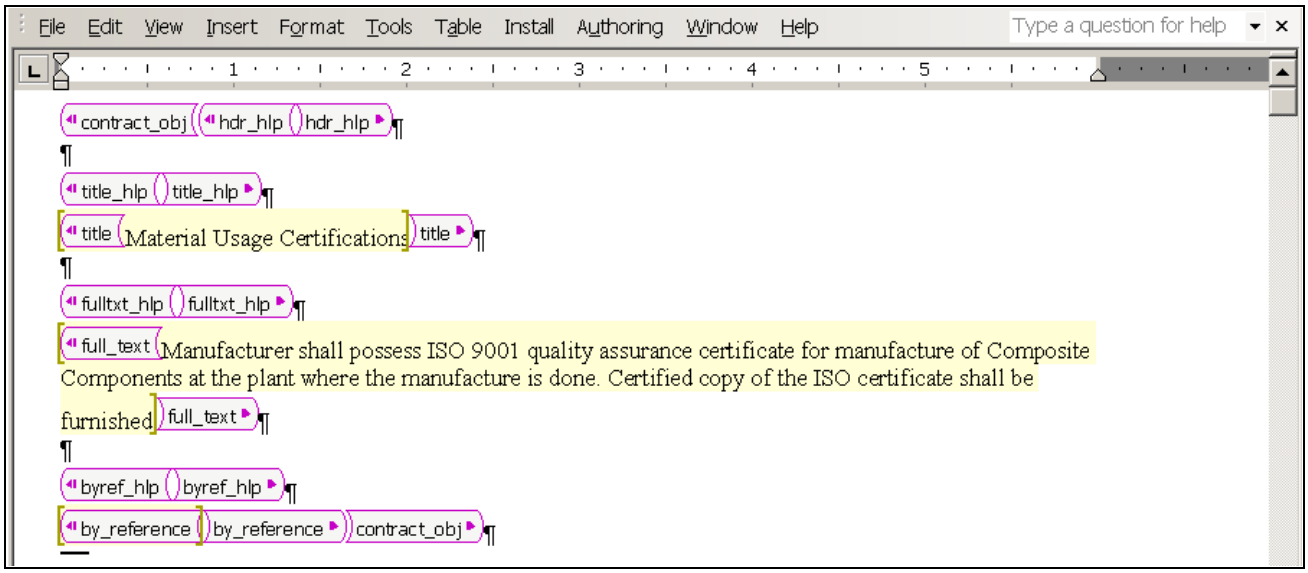

Clause XML example from within Microsoft Word

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.

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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 XML tags. The tags in a clause are protected from editing to prevent the loss of document structure. You should not delete these tags because they are used to identify areas of the clause content during document check in. In addition, all content should be included within the tags. The system ignores any text that you add to a clause outside of the tags 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 XML 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.

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.

XML Schema

Schema enables the system to define the structure, content, and semantics for XML documents. Schema is formatted in pure XML form and specifies the elements, their types, and length information that can be in an XML document. Schema generally has the extension of .xsd.

Schema is separate from the Microsoft Word document, so when you open the document, you cannot view schema. To view schema, you can use an XML editor. Viewing schema helps administrators identify how data is stored in XML, such as which custom tags the system used to create the document and the structure of XML.

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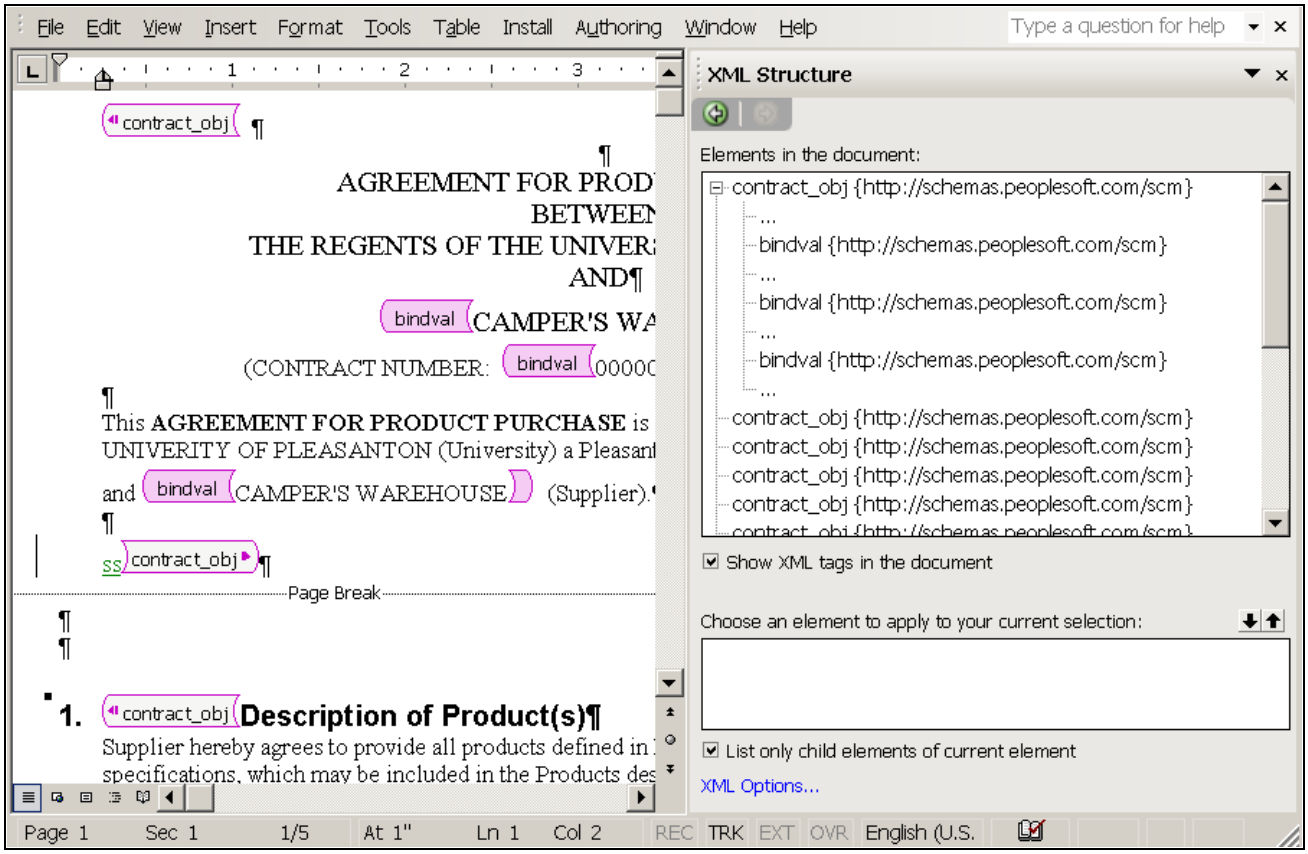
Note. For clause and document generation, PeopleSoft uses a defined custom schema that describes the tags the system uses for various fields. PeopleSoft delivers this schema, called *suppliercontract_schema.xsd* in the Winword directory for the tools installation, as a guideline to tag definitions. You do not need to install this schema or make it accessible by client machines because it is not used to enforce integrity or validate custom XML in Microsoft Word.

The system uses schema to define custom elements and attributes that extend the XML structure so that it structures the content in a Microsoft Word document as it is shared between PeopleSoft and Microsoft Word.

This example illustrates how the XML Structure task pane appears within Microsoft Word 2003:



Microsoft Word 2003 custom XML example

Note. Typically, custom 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 XML tag structure in Microsoft Word.

The following text illustrates how schema appears when opened in a text or XML editor.

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```
<xs:schema targetNamespace="http://schemas.peoplesoft.com/scm" xmlns:xs=⇒
     "http://www.w3.org/2001/XMLSchema" xmlns:psft="http://schemas.peoplesoft.com ⇒
     /scm"elementFormDefault="qualified">
 <xs:complexType name="bodyContentType" mixed="true">
  <xs:annotation>
   <xs:documentation xml:lang="en">Type used for title and body to include ⇒
          text and unlimited binds</xs:documentation>
  </xs:annotation>
  <xs:sequence>
   <xs:element name="bindval" minOccurs="0" maxOccurs="unbounded">
    <xs:complexType>
     <xs:simpleContent>
      <xs:extension base="xs:string">
       <xs:attribute name="bindname" type="xs:string"/>
      </xs:extension>
     </xs:simpleContent>
    </xs:complexType>
   </xs:element>
  </xs:sequence>
 </xs:complexType>
 <xs:attributeGroup name="contractAttr">
  <xs:annotation>
   <xs:documentation xml:lang="en">Contains required attributes needed to ⇒
         communicate with PeopleSoft when document is uploaded </xs:documentation>
  </xs:annotation>
  <xs:attribute name="cs_binds_exist" type="xs:string" use="optional"/>
  <xs:attribute name="cs_body_type" type="xs:string" use="optional"/>
  <xs:attribute name="cs_clause_lead" type="xs:string" use="optional"/>
  <xs:attribute name="cs_doc_id" type="xs:string" use="optional"/>
  <xs:attribute name="cs_doc_type" type="xs:string" use="optional"/>
  <xs:attribute name="cs_dummy_cd" type="xs:string" use="optional"/>
  <xs:attribute name="cs_keyvalue" type="xs:string" use="optional"/>
  <xs:attribute name="cs_obj_group" type="xs:string" use="optional"/>
  <xs:attribute name="cs_obj_group_type" type="xs:string" use="optional"/>
  <xs:attribute name="cs_object_id" type="xs:string" use="optional"/>
  <xs:attribute name="cs_object_type" type="xs:string" use="optional"/>
  <xs:attribute name="cs_rpt_flg" type="xs:string" use="optional"/>
  <xs:attribute name="cs_rule_flg" type="xs:string" use="optional"/>
  <xs:attribute name="cs_rule_used" type="xs:string" use="optional"/>
  <xs:attribute name="cs_sla_flg" type="xs:string" use="optional"/>
  <xs:attribute name="cs_template_id" type="xs:string" use="optional"/>
  <xs:attribute name="cs_title" type="xs:string" use="optional"/>
  <xs:attribute name="descr60" type="xs:string" use="optional"/>
  <xs:attribute name="effdt" type="xs:date" use="optional"/>
  <xs:attribute name="level_num" type="xs:integer" use="optional"/>
  <xs:attribute name="seq_nbr" type="xs:integer" use="optional"/>
  <xs:attribute name="setid" type="xs:string" use="optional"/>
 </xs:attributeGroup>
 <xs:element name="contract_obj">
  <xs:annotation>
   <xs:documentation xml:lang="en">Main element in the document ⇒
         element and working document; the hlp elements are used for ⇒
         displaying help text to enable data entry for title, full text, ⇒
         and by reference fields.  By Reference only applies to Clause ⇒
         document ⇒
     element</xs:documentation>
  </xs:annotation>
  <xs:complexType>
   <xs:all>
    <xs:element name="hdr_hlp" minOccurs="0">
     <xs:annotation>
```


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```
      <xs:documentation>Only show help text on document elements ⇒
                  e.g. clause, section, and template adhoce clause⇒
                  </xs:documentation>
     </xs:annotation>
    </xs:element>
    <xs:element name="Title_hlp" minOccurs="0">
     <xs:annotation>
      <xs:documentation>Only show help text on document ⇒
                  elements e.g. clause, section,  and template adhoce ⇒
                  clause</xs:documentation>
             </xs:annotation>
      </xs:element>
    <xs:element name="title" type="psft:bodyContentType" minOccurs="0"/>
    <xs:element name="fulltxt_hlp" minOccurs="0">
     <xs:annotation>
      <xs:documentation>Only show help text on document elements ⇒
                  e.g. clause, section, and template adhoce clause
            </xs:documentation>
          </xs:annotation>
     </xs:element>
    <xs:element name="full_text" type="psft:bodyContentType"/>
    <xs:element name="byref_hlp" minOccurs="0">
     <xs:annotation>
      <xs:documentation>Only show help text on clause object only.⇒
             </xs:documentation>
     </xs:annotation>
    </xs:element>
    <xs:element name="by_reference" type="psft:bodyContentType" ⇒
             minOccurs="0"/>
    <xs:element ref="psft:contract_obj" minOccurs="0"/>
   </xs:all>
   <xs:attributeGroup ref="psft:contractAttr"/>
  </xs:complexType>
 </xs:element>
</xs:schema>
```

Another set of XML schema provides you the capability to import clauses from a Microsoft Word file. This schema enables you to tag clause information in the document prior to importing the document. The system parses the incoming file and creates a list of clauses and content to create. You need to set up to deliver the schema to client desktops for clause librarians. This includes setting up a location to which you want to download the schema.

Using the XML file, you map data rows from the import source into the application's clause definition structure. After you add the scmt_clause.xsd schema, the new_clause tag is available for formatting clauses for import. The purpose of the tag is to mark the begin and end of each new clause to be imported from the file. As you structure clauses, you select the text to which you want to attach a new_clause tag. The tag has five elements for structuring clauses:

- ID: You can enter an ID for the clause that the system can use to name the clause when it's created in the document authoring system.
- Title: The system uses the value you define for this tag as the clause title. You can also use the first string of text in the title to create an ID for the clause using the Import Clauses page.
- Full Text: This is the Full Text field for the new clause.
- By Reference: All text within this tag is parsed into the By Reference field of the new clause.

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See Chapter 11, "Importing Clauses, Sections, and Documents," Understanding the Object Import and Creation Process, page 399.

When service pack updates to Microsoft Word are delivered, you might need new schema and namespace definitions to properly build previews and contract documents. You might not have the newer Microsoft schema because the STDTEMPLATE.XML file that was delivered with Supplier Contract Management may have been created with an older version of Microsoft Word 2003 than the version you are currently using. If you are using the STDTEMPLATE.XML file delivered with the system and receive errors regarding named spaces when you initially preview or author documents, you should open the Microsoft Word template file one time using your current version of Microsoft Word, save the file, and upload it again. This ensures that the XML schema is rewritten with latest information needed by the system. If you are using your own template file or have modified the delivered STDTEMPLATE.XML file this will normally not be an issue.

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 be always 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. For example for Microsoft Word 2003 see this support incident:

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.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," (Optional) Setting Up PeopleSoft Integration Broker for Microsoft Word and Adobe Integration, page 202

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. This section discusses:

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- 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 XML 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.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," (Optional) Setting Up PeopleSoft Integration Broker for Microsoft Word and Adobe Integration, page 202

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 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.

To resolve this situation, you must enter a more refined search text string.

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Note. When you insert clauses into documents, it's possible to have situations where a clause and its tags are inserted within another clause's begin and end tags. This will not cause an error or warning and you can still check in the file to the PeopleSoft system. When you check in the document to 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.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding System Setup for Microsoft Word Configuration Files and PeopleSoft Integration Broker, page 202

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.

For more information about the use of these settings, see Microsoft Office Word Help.

See Also

Appendix A, "Microsoft Word Integration with Supplier Contract Management," Troubleshooting Integration Issues, page 725

Appendix B, "Supplier Contract Management Helpful Hints," page 735

Format and Style Considerations in Microsoft Word

This section discusses:

- Styles and formatting.
- Templates.
- Sample templates.

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- 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 Help and web sites provide information that pertains to features and functionality of Microsoft products.

See Appendix A, "Microsoft Word Integration with Supplier Contract Management," Styles and Formatting, page 711.

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.

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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 Microsoft Word 2003 .xml file format.

While Supplier Contract Management uses Microsoft Word templates they are not used in the traditional manner. The system does not store text and placeholders in the template. 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 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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Default Settings for Document Formats and Options, page 254.

Sample Templates

The PeopleSoft installation CD provides a sample Microsoft Word 2003 template file. The STDTEMPLATE.XML template 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.XML in the Document Template and Styles setup component; however, you need to perform an actual upload of the actual STDTEMPLATE.XML file again to place the template on a specific FTP server.

With updates to Microsoft Word 2003, you might need new schema and namespace definitions to properly build previews and contract documents. You might not have the newer schema because the STDTEMPLATE.XML file that was delivered with Supplier Contract Management may have been created with an older version of Microsoft Word 2003 than the version you are currently using. If you are using the STDTEMPLATE.XML file delivered with the system, you should open the file one time using your current version of Microsoft Word 2003, save the file, and upload it. This ensures that the XML schema is rewritten with latest information needed by the system. If you are using your own template file, this is not an issue.

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 document (.XML format) along with formatting from the Microsoft Word template.

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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 (schema definitions, 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 PeopleSoft installation CD provides a sample Microsoft Word template file STDTEMPLATE.XML that 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.

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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/training/training.aspx?AssetID=RC011039261033

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 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 later in this chapter.

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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 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.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.XML template by clicking the View button.

   The system opens the Microsoft Word document.
3. View the paragraph style in Microsoft Word.

   For example, select Format in the toolbar, and then Styles and Formatting from the list of values.

   The Styles and Formatting task 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.

See Also

Chapter 9, "Managing the Contract Library," Defining Document Configurators, page 337

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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 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.

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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.*

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Document Templates and Styles, page 252

Style Examples

This section provides 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:

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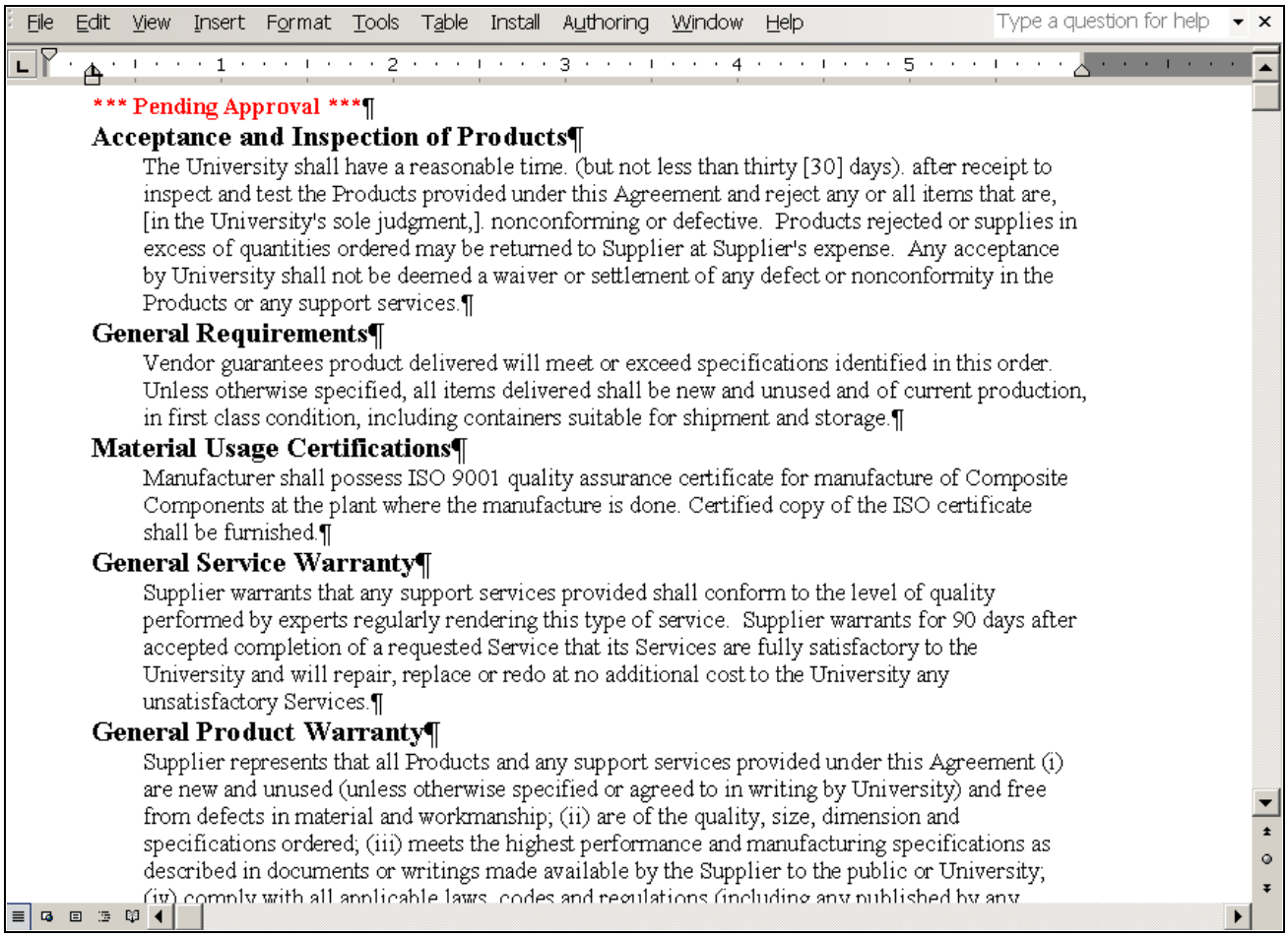

Unnumbered clauses document example

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 a 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 example illustrates a numbered clause document:

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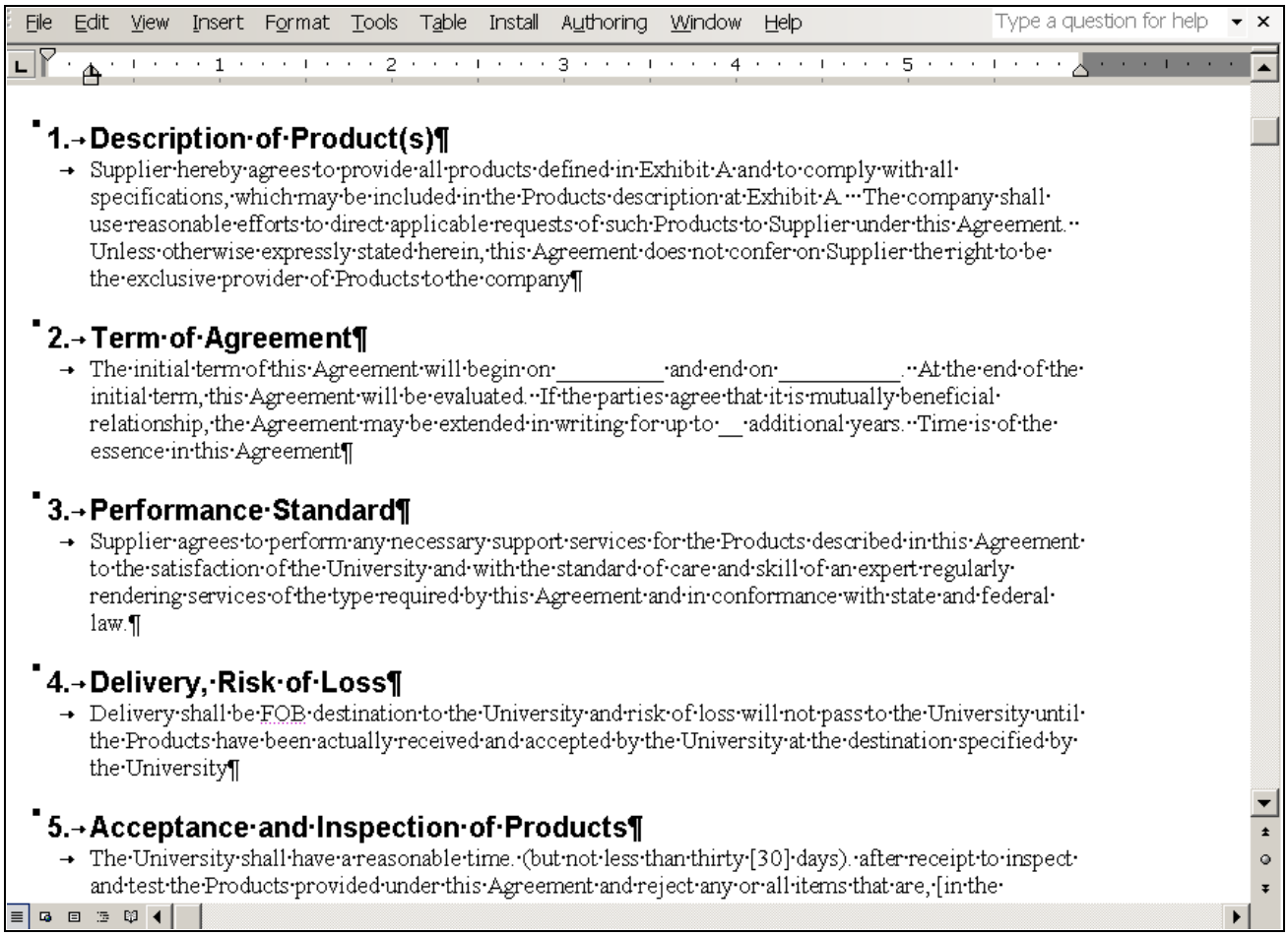

Numbered clauses document example

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 example illustrates an indented numbered content in a generated document:

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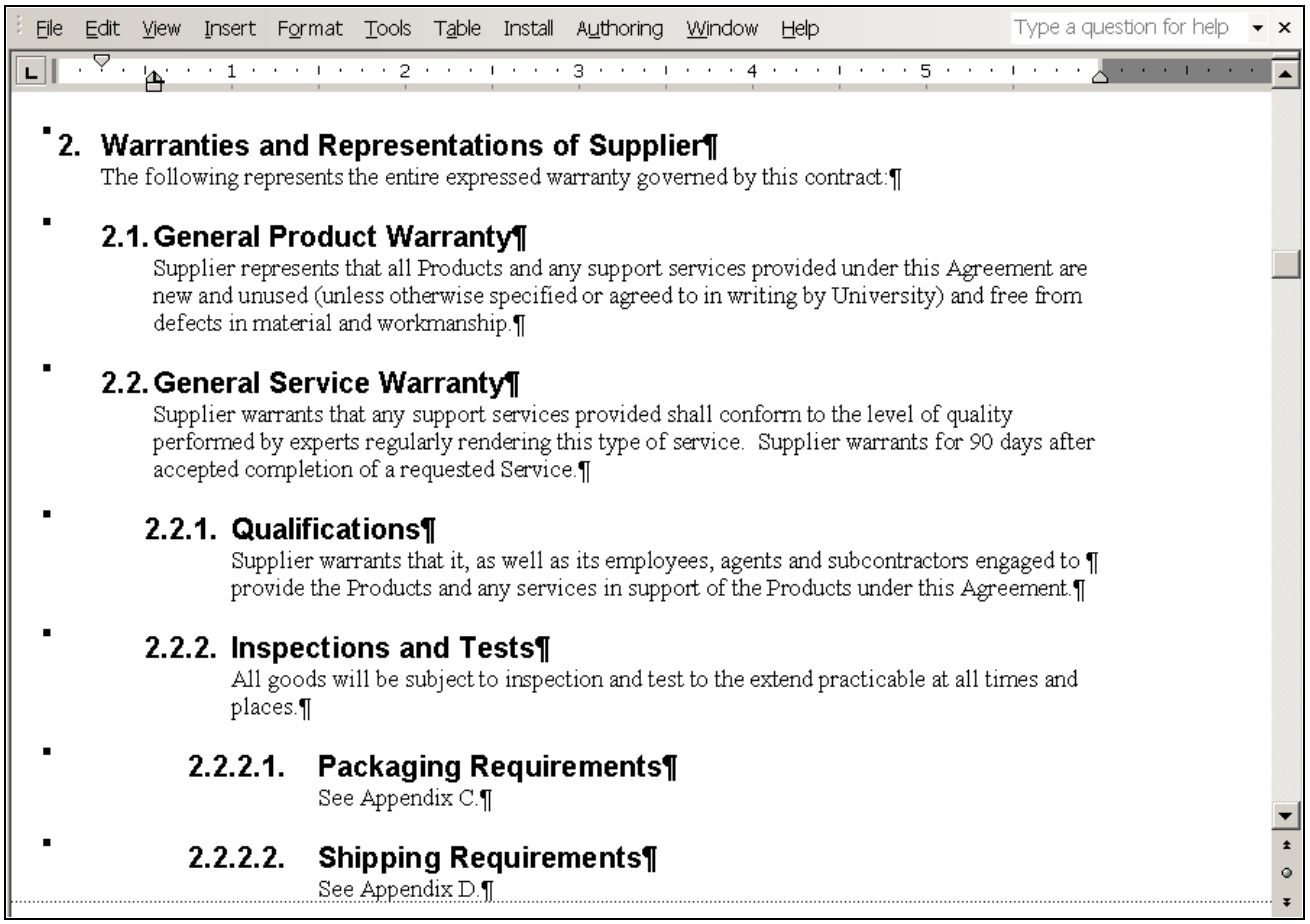

Indented numbered content in a document example

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.

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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.

Note. If you are not using an Unicode Standard database, you should refrain from using special characters including:

- *"* 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.

Note. You must manually review and replace the characters before you use a document configurator to generate the document when having multibyte character issues.

Protected Areas

When the system initially generates a Microsoft Word document for a clause or section, the system places custom XML tags around the content that is protected. When you edit a clause or section, you can only edit the content. If you delete or alter the tags 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.

For an authored document the protection feature can prevent certain edits and actions in Microsoft Word. For example, as a document administrator, you might find that you need to turn off protection in order to review, accept, or reject document changes when collaborators changes have been captured with track changes on.

Warning! Using the Microsoft Word Protect Document feature for PeopleSoft authored documents should be considered as an administrator-level task. If you remove document protection, it's possible that editors of the document can change the actual bind values from their real transactional or wizard values. See Microsoft Word documentation for information pertaining to protecting documents.

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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.

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.

Note. See Microsoft documentation for information that pertains to Microsoft features and functionality.

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.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Document Comparisons and Rendering, page 224

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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.

Document Table of Contents

This example illustrates a document table of contents:

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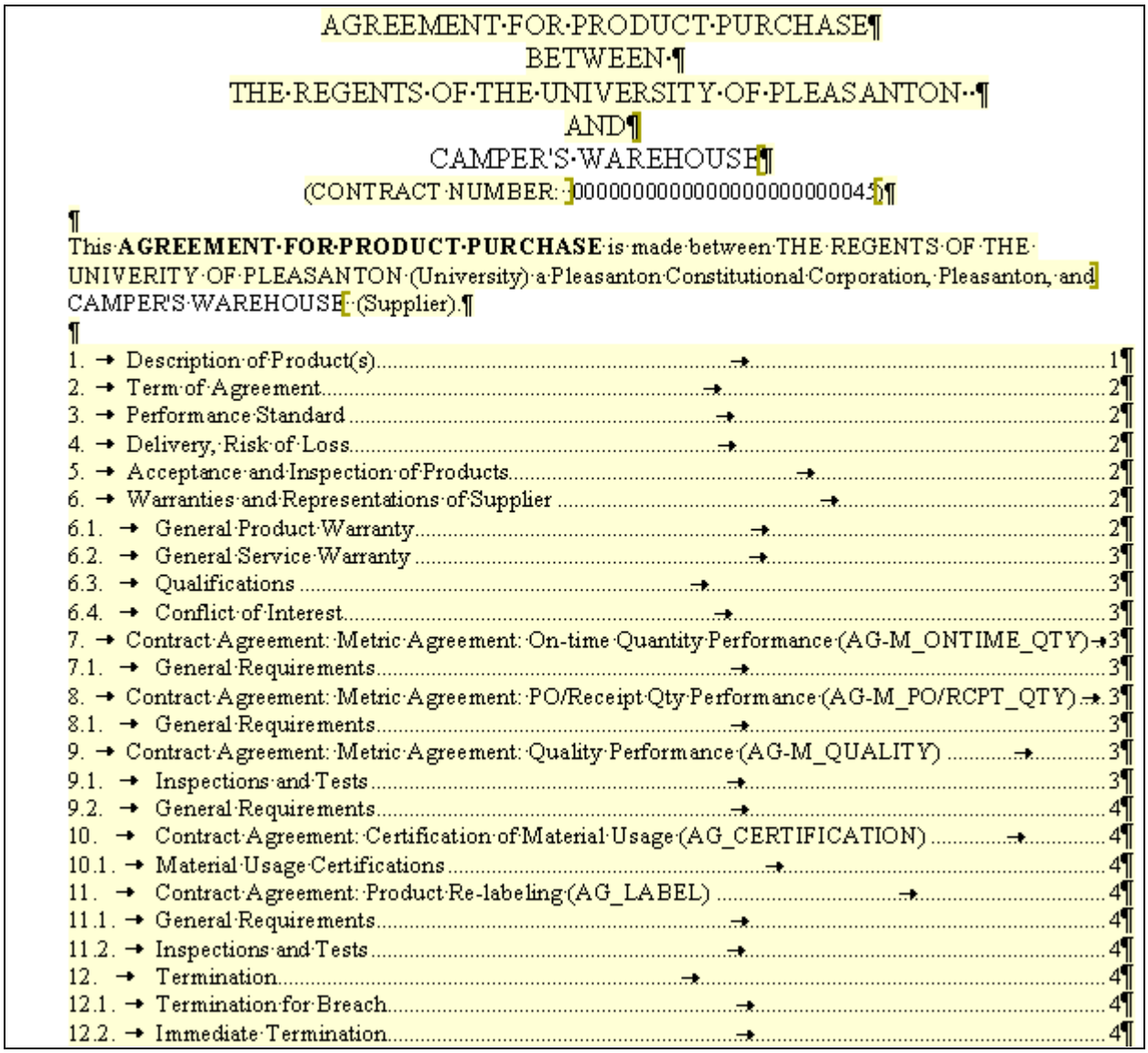

AGREEMENT FOR PRODUCT PURCHASE
BETWEEN
THE REGENTS OF THE UNIVERSITY OF PLEASANTON
AND
CAMPER'S WAREHOUSE
(CONTRACT NUMBER: 0000000000000000000000045)

This **AGREEMENT FOR PRODUCT PURCHASE** is made between THE REGENTS OF THE UNIVERITY 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

Microsoft Word table of contents example

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.

3. After you generate the document, select and update the field for the Microsoft Word Table of Contents field code in the document.

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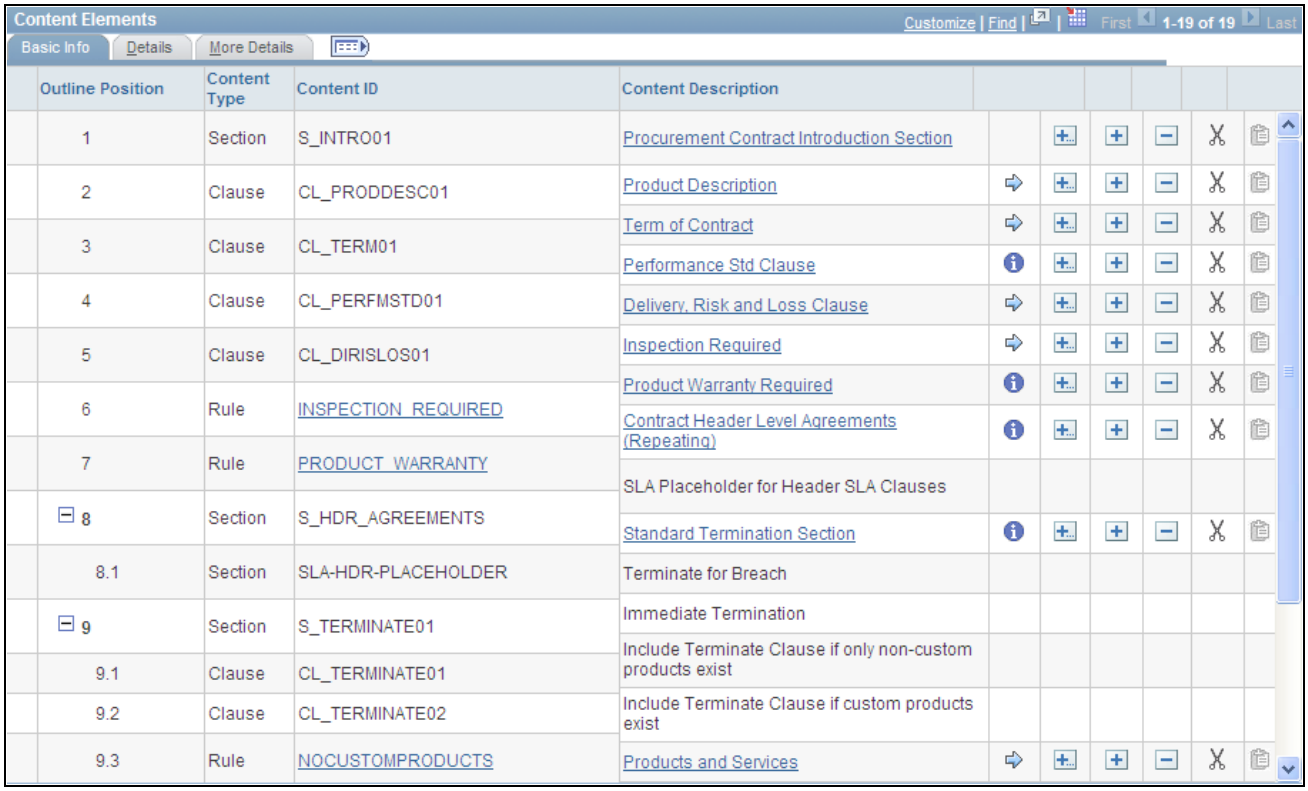
This example displays a document configurator contents similar to the configurator that produced the previous Microsoft Word table of contents example:



Content Elements — Customize | Find | First 1-19 of 19 Last

Basic Info | Details | More Details

Outline Position	Content Type	Content ID	Content Description
1	Section	S_INTRO01	Procurement Contract Introduction Section
2	Clause	CL_PRODDESC01	Product Description
3	Clause	CL_TERM01	Term of Contract
			Performance Std Clause
4	Clause	CL_PERFMSTD01	Delivery, Risk and Loss Clause
5	Clause	CL_DIRISLOS01	Inspection Required
			Product Warranty Required
6	Rule	INSPECTION_REQUIRED	Contract Header Level Agreements (Repeating)
7	Rule	PRODUCT_WARRANTY	SLA Placeholder for Header SLA Clauses
8	Section	S_HDR_AGREEMENTS	Standard Termination Section
8.1	Section	SLA-HDR-PLACEHOLDER	Terminate for Breach
9	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	Products and Services

Example of document configurator content elements

Troubleshooting Integration Issues

This section provides 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:

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Clause library formats and previews	Cannot perform certain Microsoft Word formatting, such as centering a line.	The Protection feature in Microsoft Word is preventing formatting because protection start and end indicators (brackets) are on the line you are formatting. This can typically happen on the first or last line of text.	First, attempt to move the text by inserting a blank line at top or bottom of the text next to the protection bracket to move the text away from the protection marker. Then, format the text and delete the blank line. If this does not resolve the issue, use the Microsoft Word Protection feature to stop protection, reformat the document, and start protection again. ***Warning!*** Using the Protect Document feature is an administrator-level task. If you remove document protection, it's possible that you can lose changes to documents when they are checked in. See Appendix A, "Microsoft Word Integration with Supplier Contract Management," Protected Areas, page 721.
	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 plug-in	Contact the system administrator to configure Microsoft Windows to launch Microsoft Word for Microsoft Word 2003 .xml file format extensions. For information about customizing the tool bar, use Microsoft Word Help.
	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.

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Category	*Problem*	*Possible Cause*	*Possible Resolution*
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 Appendix A, "Microsoft Word Integration with Supplier Contract Management," Character Limitations, page 720.
	Cannot edit text, refresh a table of contents or perform other functions in Microsoft Word.	The Microsoft Word Protection feature is protecting 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. This prevents you from changing the document without changing the source value in the transaction system. When this is not the case, you must use the Protection feature in Microsoft Word to stop the protection, make the edits, and restart the protection after you are complete. ***Warning!*** Using the Protect Document feature is an administrator-level task. If you remove document protection, it's possible that you can lose changes to documents when they are checked in. See Appendix A, "Microsoft Word Integration with Supplier Contract Management," Protected Areas, page 721.

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Category	*Problem*	*Possible Cause*	*Possible Resolution*
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.	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. 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.
	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.

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Category	*Problem*	*Possible Cause*	*Possible Resolution*
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.	Possible causes include: • 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. • 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.	Possible solutions include: • 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. • 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.

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Category	Problem	Possible Cause	Possible Resolution
Research task pane lookups and bind variables in Microsoft Word.	The Research task pane does not return results from the search.	Possible causes include: • Messaging between the Microsoft Word client and the PeopleSoft system is not set up correctly. • The local client machine has not been updated with client updates. • The configuration file has incorrect information defined in it for client installation.	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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding System Setup for Microsoft Word Configuration Files and PeopleSoft Integration Broker, page 202.
	The Research task pane does not insert the clause content into the document after you click the Insert Full Text button.	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. 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.	Attempt to simplify the custom formatting of the clause or divide it into smaller clauses.

Category	Problem	Possible Cause	Possible Resolution
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.	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. 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.	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 Appendix A, "Microsoft Word Integration with Supplier Contract Management," Spelling and Grammar Checks in Microsoft Word, page 722.

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Category	*Problem*	*Possible Cause*	*Possible Resolution*
	When inserting clauses from the Research task pane, the system includes the clause within the XML tags of another clause which leaves the clauses nested in the document.	The system inserts clauses based on where you position the cursor in the document. If the cursor is within the tags of another clause, the system inserts the clause within the existing clauses tags. 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.	You can avoid the nested clause affect by performing these steps in the Microsoft Word document: 1. Place the cursor at the beginning of the first line of the clause below where you want to insert the new clause. You might need to use the Home key to position the cursor before the hidden XML tag. 2. Use the Return key to insert a new line above the current line. You can validate that the clause is inserted correctly by selecting the Show XML tags in document check box in Microsoft Word. 3. Place the cursor on the new line to insert the new clause from the Research task pane.

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Category	*Problem*	*Possible Cause*	*Possible Resolution*
Document generation and editing	The table of contents does not appear when you preview a generated document.	Possible causes include: • The Include Table of Content If Available check box was not selected on the Document Configurator Definition page. • The Table of Contents field code was not inserted in the default Microsoft Word template used by the document configurator. • When you open the document file, Microsoft Word does not expand the table of contents.	Ensure the Include Table of Content If Available 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 Preview Document 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: Error! No table of contents entries found. To display the table of contents, right click on this message and select *Update Field.* The system displays the table of contents.
	All of the custom PeopleSoft tags are missing from the authored document.	Possible causes include: • Custom tags and content were deleted manually from the document prior to checking in the document. • Some one who edited the document was not using the Microsoft Office Word 2003 Professional version.	View the check-in history for the authored document. Ensure that the person who checked in the document is using the correct Microsoft Word version: Microsoft Office Word 2003 Professional version. The standard version of Microsoft Office Word 2003 should not be used for documents that are checked back into the system because custom tags can be lost.
	An image placed in a document header displays as a placeholder button and not as an image.	You are using a version of Microsoft Word 2003 that does not properly display images. You should use version SP1. **Note.** The current version should be Microsoft Office Word 2003 SP1. The version is a part of Microsoft Office Professional Edition 2003.	Click the Help option on the Microsoft Word toolbar. Then, clickAbout Microsoft Office Word to display current version of Microsoft Word. If the version is not SP1 or higher, contact the administrator for an updated version of the software.

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Category	Problem	Possible Cause	Possible Resolution
Document generation and editing	Document headers and footers do not display.	Headers and footers should be added to the Microsoft Word template that the document uses. If the current view in Microsoft Word is set to Normal, the headers and footers might not display.	Add headers and footers to the Microsoft Word template used by the document configurator. After you preview the generated document, set the View menu to *Print Layout* to view the headers and footers.
	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.	The Use Track Changes in Word check box in the Processing Option 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.	Select the Use Track Changes in Word check box on the Installation Options page. Set the document protection in Microsoft Word. Click the Tools option on the toolbar, and then select the Unprotect Document menu option. See Appendix A, "Microsoft Word Integration with Supplier Contract Management," Protected Areas, page 721. ***Warning!*** 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.

Category	Problem	Possible Cause	Possible Resolution
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.	The default location for the Microsoft Windows Save and Save As actions are set from the Save command. The location in which you saved the document is a file server that is not currently available.	Microsoft Windows sets the default save location to the My Documents or Winword 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.

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Category	*Problem*	*Possible Cause*	*Possible Resolution*
	Additional contract_obj XML tags appear in a document that has been opened using the Preview Document button. The tags appear when the Show XML tags in the document check box has been selected in Microsoft Word, and the tags appear empty. Additional tags might also exists for structures such as repeating clauses and sections.	During document generation, the system expands the content in the document configurator. During this expansion, it evaluates rules. If a rule evaluates true, the system adds the rule object and referenced content in the rule to the document. If the rule evaluates false, the system still adds the rule element to the document. Similarly, any repeat elements or alternates that are added to the document, the system inserts dummy contract object tags. The objects do not have any content associated with them and only have attributes.	Authors should be aware of the tags in the document and understand that the tags are only placeholders for the rules, and repeat or alternate clauses. In general, the tags do not cause document issues and should not be edited or deleted. The document appear correctly in the Microsoft Word Print Layout view.

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Appendix B

Supplier Contract Management Helpful Hints

This appendix provides information about resolving issues when implementing, setting up, and using PeopleSoft Supplier Contract Management and discusses:

Implementation and setup.

Contract library setup.

Understanding This Appendix

This appendix provides recommended solutions to some of the more common setup issues encountered by PeopleSoft Enterprise Supplier Contract Management customers.

Note. The information provided here is not consulting or implementation advise 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.

For more detailed information for setting up PeopleSoft Supplier Contract Managment, see the Setting Up PeopleSoft Supplier Contract Management chapter.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," page 195

Implementation and Setup

This section discusses:

- Supplier Contract Management setup needs.
- Setup Manager for PeopleSoft Supplier Contract Management.
- Dispatch, comparison, render, and prepare error resolution.
- Microsoft Word document launch problems.

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- Microsoft Word template file errors.
- Document preview and generation errors.
- Verity indices setup.

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 here, you should first use the Setting Up PeopleSoft Supplier Contract Management chapter as part of the setup process.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," page 195.

This list provides information about setting up PeopleSoft Supplier Contract Management:

- File transfer protocol (FTP) server.

  Supplier Contract Management enables you to store documents within the database or using an FTP server. If you decide to use the FTP server, you can generally verify that it is working correctly by uploading a Microsoft Word template. If the upload fails, it indicates that the FTP server is not setup correctly. A way to verify that the FTP server is setup correctly is to log onto an application server and verify that you can manually login to FTP files outside of the PeopleSoft Enterprise application.

  Common issues with using FTP servers include:

  - The application server not having network access to the FTP server.
  - The FTP user does not have write authority to the FTP server.
  - The FTP user password is not correct.

    See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up Supplier Contract Attachment Database and FTP Servers and Directories, page 197.

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- Setting up 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 FTP 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 FTP server for Supplier Contract Management document authoring.

  Note. You also have the option to configure the system to store all Supplier Contract Management attachments in the database instead of the FTP server. In this case you should leave the Override Attachment Server ID setting on Installation Options page blank.

  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.

  Note. When you use both a database and FTP 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 FTP server, and when you are running both database and FTP servers, the component writes to the database server. Leaving the row in place can cause problems with attachments in the Contract Entry component.

- Microsoft Word Template.

  You need to have a Microsoft Word template loaded into the system. Anytime you change or add a FTP 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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Document Templates, page 252.

- 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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Default Settings for Document Formats and Options, page 254.

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- 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.

  You need to complete two key tasks to enable the compare and render features. First, you must place the csdocutil.dll file into the tools/bin/server/winx86 directory for the NT application server that you configured for the database server. To do this:

  - The server must be a Microsoft Windows application server because it needs to run the Microsoft Word program for compare, rendering .doc, and preparing digital signature files when they are enabled.

    This should be a stand-alone Microsoft Windows application server to avoid contention with any primary application server for the database.

  - Locate the csdocutil.dll file in the adntcf02\dfs drive delivered with the PeopleSoft PeopleTools installation and define an application server.

    The path to the file is: \\adntcf02\dfs\build\fscm\fscm9\shipped\win2k\core\install.mss\bin\server\winx86. After you define the application server in the csdocutil.dll file, use the server that defined in the Compare/Render Server/Path field on the Installation Options page. The system uses the path in the code to publish a synchronization message to that application server to invoke the .dll file.

    Also, make sure that the service operation CS_DOC_ACTION is active. This is the message that actually handles calling the .dll file and performing data processing.

    See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Installation Options for PeopleSoft Supplier Contract Management, page 223.

    See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Document Comparison and Rendering Setup, page 224.

- 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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Setting Up User Preferences, page 266.

  See Chapter 2, "Understanding PeopleSoft Supplier Contract Management," Supplier Contract Sample Permission Lists, Roles, and Users, page 22.

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- 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 Microsoft Word 2003 Professional or Microsoft Word 2007. 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.

  Click the following links to view steps for setting up service operations and configuring workstations.

  See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding System Setup for Microsoft Word Configuration Files and PeopleSoft Integration Broker, page 202.

  See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding System Setup for Microsoft Word Configuration Files and PeopleSoft Integration Broker, page 202.

See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," page 195

Chapter 9, "Managing the Contract Library," page 271

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, 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.

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.

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 Microsoft Word 2003/2007 that reside on the Microsoft Windows server.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Document Comparisons and Rendering, page 224.

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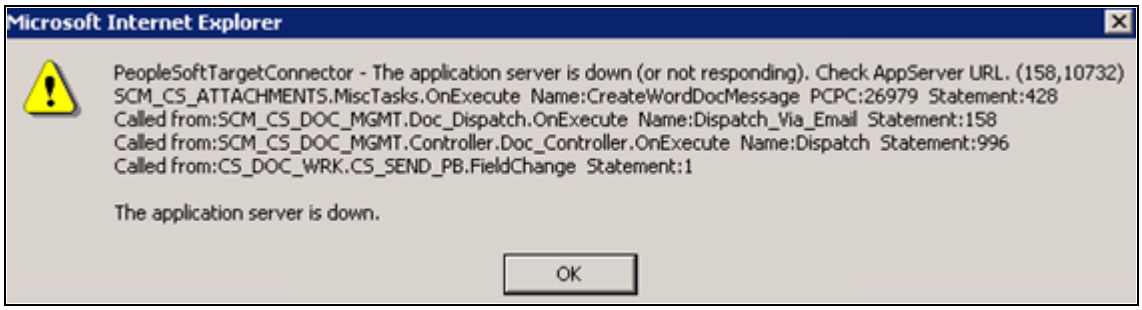
These error message conditions can occur when various dispatch and comparison items are not setup correctly:

– The application sever URL on the installation page is not setup correctly, but the gateway is. The message appears as follows:



Message example

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.*

– When there is not a .dll file on the application server (csdocutil).

The message appears as follows:

Message example

– If you did not enter a default value or user ID and password on the configuration setting for the gateway properties, this message appears:

Message example

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– The integration gateway is on version *XX* while the application server defined on the Installation Options page is on *YY*.

The message appears as follows:

Message example

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.

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- 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 DOCextension 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 FTP 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 FTP 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 FTP server that you entered is active and working by using the information on this page to try to log into the FTP 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.

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- 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 2003 .xml file again. If the file doesn't upload, you most likely have an FTP server setup issue.

See Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Understanding Document Templates, page 252.

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 2003 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 2003 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.

Verity Indices Setup

Setting up Verity searches for Supplier Contract Management requires that you setup indices that control the returned data to populate search fields. Verity search setup is documented in the PeopleSoft Enterprise Supply Chain Management Common Information PeopleBook. While most of the examples describe eProcurement-specific Verity indices, the concepts apply to other products, including PeopleSoft Supplier Contract Management.

See *PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook*, "Implementing the Verity Search Engine."

The PeopleSoft Supplier Contract Management documentation lists Verity indices that need to be included in the application server configuration file (psappsrv.cfg) and process scheduler configuration file (psprcs.cfg). You use these indices the same as you would for the PeopleSoft eProcurement FDM_PV_ITEMCATALOL Verity index that is described in the PeopleSoft Enterprise Supply Chain Management Common Information PeopleBook.

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You can locate the Supplier Contract Management Verity search collections different from the PeopleSoft eProcurement locations. To store Supplier Contract Management Verity search collections, add these collections to the configuration file psappserv.cfg:

- CS_OBJECTS=D:\apps\psoft\fin\findev\temp
- CS_CONFIGURATOR=D:\apps\psoft\fin\findev\temp
- CS_DOCUMENTS=D:\apps\psoft\fin\findev\temp

See Chapter 14, "Searching for Library and Document Contents," Building Contract Search Indexes, page 598.

Contract Library Setup

This section discusses:

- 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 Microsoft Word Integration with Supplier Contract Management appendix.

See Appendix A, "Microsoft Word Integration with Supplier Contract Management," page 701.

See Also

Appendix A, "Microsoft Word Integration with Supplier Contract Management," Troubleshooting Integration Issues, page 725

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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.

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See Also

Chapter 9, "Managing the Contract Library," Defining Clause Information, page 309

Appendix A, "Microsoft Word Integration with Supplier Contract Management," Protected Areas, page 721

Cannot Cut or Paste from Microsoft Word Files Into PeopleSoft Pages

When you cut and paste from a Microsoft Word document into PeopleSoft Internet Architecture 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.

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See Also

Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," Defining Default Settings for Document Formats and Options, page 255

Appendix A, "Microsoft Word Integration with Supplier Contract Management," Styles and Formatting, page 711

Chapter 9, "Managing the Contract Library," Viewing and Maintaining Configurator Structures, page 349

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 increases 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 Chapter 8, "Setting Up PeopleSoft Supplier Contract Management," URL Configuration for Use with Clause Searches, page 206.

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.

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Appendix C

Delivered Workflows for PeopleSoft Supplier Contract Management

This appendix discusses the delivered workflows for PeopleSoft Supplier Contract Management.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Chapter 16, "Configuring PeopleSoft Approval Framework for Use with Supplier Contract Management," page 635

Chapter 17, "Approving Documents and Document Components," page 649

Delivered Workflows for PeopleSoft Supplier Contract Management

This section discusses PeopleSoft Supplier Contract Management workflows. The workflows are listed alphabetically by workflow name.

Agreement and Verification Step Notification

This section discusses the PeopleSoft Supplier Contract Management workflow notifications for contract agreements, verification steps, and performance metrics.

Description

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.

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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.

See Also

Chapter 4, "Defining Contract Agreements," Setting Up Header Agreement Verification Steps, page 102

Chapter 4, "Defining Contract Agreements," Using Agreement Metrics, page 73

Clause Approval

This section discusses the PeopleSoft Supplier Contract Management workflow that uses the PeopleSoft Approval Framework to route and approve clauses for approval.

Description

Event Description	A clause is submitted for workflow approval using the Submit for Approval 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 deny or approve the clause.
Notification Method	Email and worklist.
Email Template	Clause Approval (Routing for Clause Approvers)

See Also

Chapter 17, "Approving Documents and Document Components," Approving Clauses, page 651

Collaboration

This section discusses Supplier Contract Management collaboration that uses the PeopleSoft Approval Framework to route documents for collaboration.

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Description

Event Description	A document is submitted for collaboration using the Route Internally or the Route Externallybutton 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)

See Also

Chapter 13, "Managing Document Life Cycles," Collaborating on Documents, page 542

Document Approval

This section discusses the Supplier Contract Management workflow that uses the PeopleSoft Approval Framework to route documents for approval.

Description

Event Description	A document is submitted for workflow approval using the Submit for Approval 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.
Email Template	Document Approval (Routing for Contract Approvers)

See Also

Chapter 17, "Approving Documents and Document Components," Approving Documents, page 664

Document Signatures

This section discusses the Supplier Contract Management workflow that uses the PeopleSoft Approval Framework to route documents for signatures.

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Description

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 Internal Contacts/Signers 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

This section discusses the Supplier Contract Management workflow to send spend threshold notifications.

Description

Event Description	Workflow notifications are sent for contracts specified that have spend threshold defined for them.
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.

See Also

Chapter 3, "Defining Supplier Contracts," Setting Up Spend Thresholds and Running Contract Alert Workflows for Purchasing Contracts, page 60

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Appendix D

PeopleSoft Supplier Contract Management Reports

This appendix provides an overview of PeopleSoft Supplier Contract Management reports and enables you to:

- View summary table of all reports.
- View report details.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler

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 appendix.

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
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

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Report ID and Report Name	Description	Navigation	Run Control Page
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
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

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Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
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

This section provides detailed information about individual reports including important fields. The reports are listed alphabetically by report name.

Common Elements Used in This Section

Administrator Displays the document administrator.

Approval Type Displays the approval type for the clause that has been updated.

Class Displays the clause class ID, for the updated clause.

Content ID Displays the object ID and description.

Content Type Displays the set ID and type of object.

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Department Displays the department listed on the document.

Description Displays the object description.

Document ID Displays the document in which the change occurred. This identifier includes the setID, source transaction, and document ID.

Sponsor Displays the user ID assigned as the sponsor of the document.

Status Displays the status of the document in which the object appears.

Type Displays the document type that was used to create the document. The library set ID 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.

Transaction ID 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 vendor ID.

Status Displays the status of the corresponding document. Status values are assigned depending on a document's life-cycle stage. These values include:

- *Approved*
- *Collaborated*
- *Collaborated, Pending Review*
- *Complete*
- *Dispatched*
- *Draft*
- *Executed*
- *Pending Approval*
- *Pending Collaboration*
- *Pending External Collaboration*
- *Pending Internal Review*

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Document Type Displays the document type and the library set ID. 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.

Version 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.

Begin Date/Expire Date 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.

Transaction Status Displays the current status of the purchase order or purchasing contract. This value is retrieved from the Status field on the purchasing contract. Values for the purchasing contract include:

- Approved
- Cancelled
- Closed
- On-hold
- Open

Values for the purchase order include:

- *Approved*
- *Canceled*
- *Complete*
- *Dispatched*
- *Denied*
- *Initial*
- *Line Denied*
- *Open*
- *Pending Approval/Approved*
- *Pending Cancel*

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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.

Document Includes a variety of information about the document. For example, the document ID, transaction status, document type, library set ID, administrator, version, sponsor, and department.

Current Status and User Fields Displays the document status and user fields. See the previous report for document status values.

Based on the status, additional information might exist if the document is:

- Approved – when it was approved
- Collaborated – when it was collaborated, and the collaboration version.
- Completed – when it was completed.
- Dispatched – when it was dispatched and the dispatch version.
- Executed – when it was executed.
- Amended – the amendment number and option and when it was amended.

When user-defined fields have been established and are being used in the document, the report displays those fields and their values.

Activity 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.

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.

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.

Status/Version Displays the status and version of the document in which the object change occurred.

Configurator ID Displays the configurator used to create the changed document. This includes configurators for the main document, amendment, and executive summary as appropriate.

Change Type Displays the type of change that was made to the object. Values include:

Add.

Change.

Delete.

Body Type 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.

Library Content Text 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.

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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.

Configurator ID Displays the configurator used to create the reported document. This includes configurators for the main document, amendment, and executive summary as appropriate

Body Type 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.

Effective Date 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.

Section Information Displays the type of section. Section types include *Title, General,* and *Placeholder.*

Clause Information Displays information about the clause. The information includes the clause ID, class, and approval type.

Library Displays the library to which a clause belongs. A library is a grouping of clauses that you can use for documentation purposes.

Last Updated Displays when the object was last updated and the operator who made the update.

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