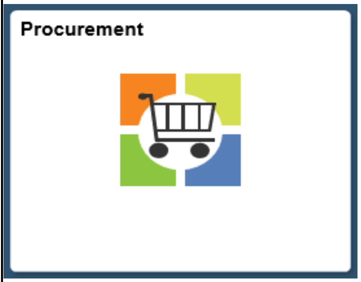
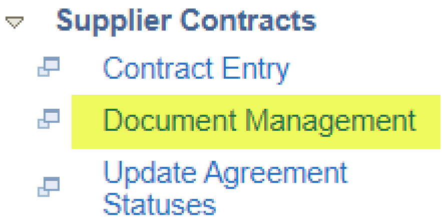
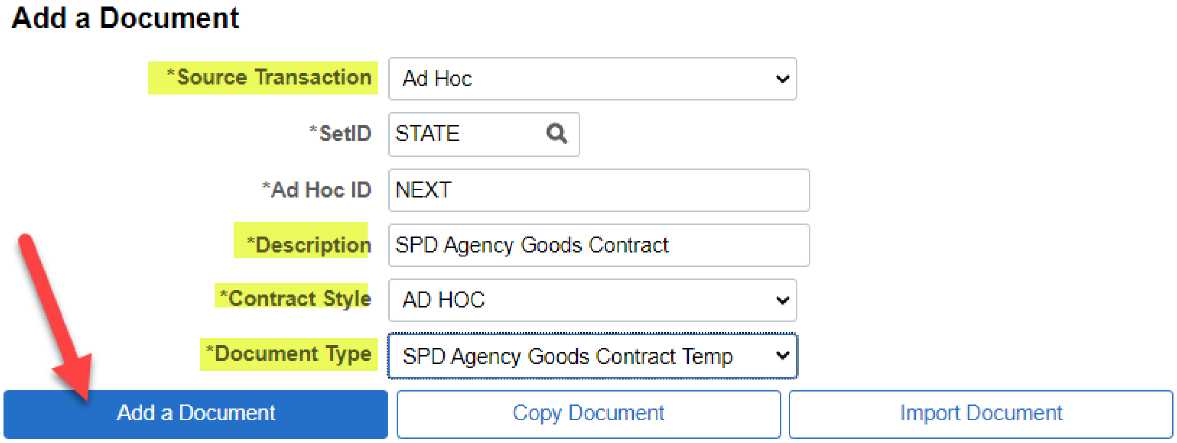
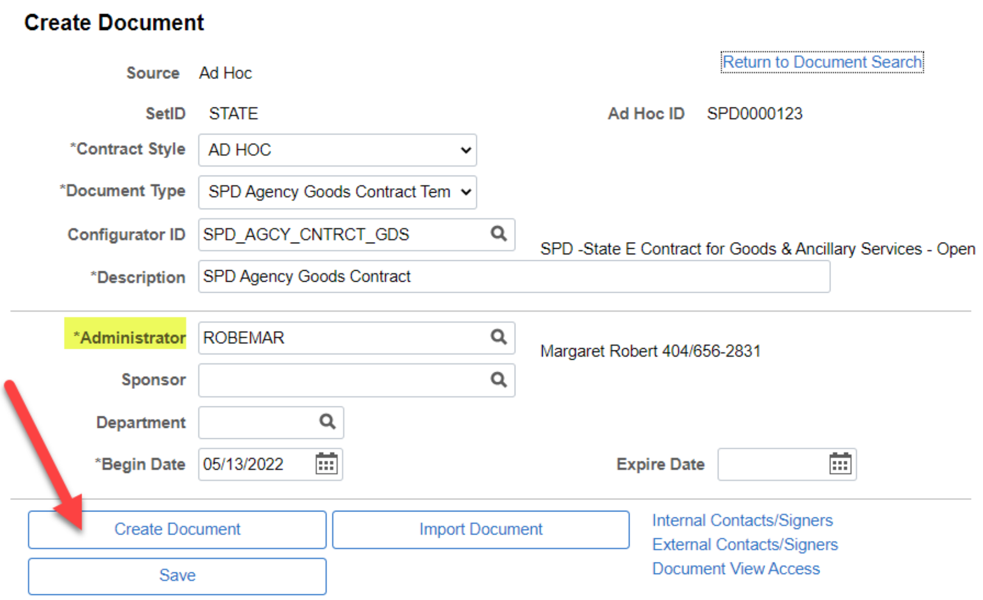
9.2.38 Create a Contract Using a Template

- Use this check list to create a Contract document in Supplier Contracts module from the Contract Entry page. For **more in depth detail refer to your training documentation.**

Step #	Do This:
1.	**Log onto PeopleSoft and then click on the Procurement tile.**  Procurement **Supplier Contracts > Document Management** • This will bring up the Create Document page.  Supplier Contracts Contract Entry Document Management Update Agreement Statuses
2.	**Select** the Source Transaction, enter a brief description of the contract, select the Contract Style as Ad Hoc, and select a Document Type. Click Add a Document.  Add a Document *Source Transaction: Ad Hoc *SetID: STATE *Ad Hoc ID: NEXT *Description: SPD Agency Goods Contract *Contract Style: AD HOC *Document Type: SPD Agency Goods Contract Temp Add a Document Copy Document Import Document

3. **Verify** the correct Administrator's name is listed or select the magnifying glass to select an Administrator then select the yellow Create Document button.



Create Document

Source Ad Hoc

SetID STATE

Ad Hoc ID SPD0000123

*Contract Style AD HOC

*Document Type SPD Agency Goods Contract Tem

Configurator ID SPD_AGCY_CNTRCT_GDS SPD -State E Contract for Goods & Ancillary Services - Open

*Description SPD Agency Goods Contract

*Administrator ROBEMAR Margaret Robert 404/656-2831

Sponsor

Department

*Begin Date 05/13/2022

Expire Date

Return to Document Search
Create Document
Import Document
Save
Internal Contacts/Signers
External Contacts/Signers
Document View Access

4. **Select** the yellow "Create Document" button.
   - This will bring up the Wizard Execute-Create Document screen.
   - If you already have an electronic version of a contract, you can import the document into Supplier Contracts instead of creating a new document.
   - All contracts must be either created in the system or imported into the system. This module serves as a repository for all contract documents.

5. **Respond** to each wizard question.
   - The responses will appear in the online boxes.
   - Questions marked with an asterisk are required.

6. **Select** the yellow "Finish" button.
   - The system will generate the document utilizing the answers from the wizard questions. The Document Management page will appear.

7. **Click** on the yellow "Edit" button.
   - Microsoft Word will be initiated.

8. **Click** on the "Open" button for WORD.
   - The Document will open up in Microsoft Word.

9. **Unprotect** the document
   - Click on Enable Editing.
   - Make any edits to the document as needed.

10. **Save your file to your desktop computer.**
    - The file will have an extension of .XML

11. **Select the yellow "Check-in" button.**
    - The Check in Document screen will appear.

12. **Select the grey browse button to search your computer for the saved file.**
    - System will display files on your computer.

13. **Select the file.**
    - The name of the file will be populated in the box.

14. **Select the upload button.**
    - System will return to the Document Management screen.