

# eMACS

# Contract Management Guide

Revised May 2021



State Procurement Bureau/eMACS Support Unit  
State Financial Services Division  
Department of Administration  
**DESK 406.444.2575**

## TABLE OF CONTENTS

<b>PURPOSE</b>		3
<b>CHAPTER 1</b>	<b><u>CREATING CONTRACTS</u></b>	4
	<u>Section 1 – Creating a New Contract from Create New Contract</u>	4
	<u>Section 2 – Entering Contract Information</u>	6
	<u>Section 2.1 – Contract Header</u>	7
	<u>Section 2.2 – Dates and Renewals</u>	8
	<u>Section 3 – Custom Contract Information</u>	8
	<u>Section 4 – Insurance</u>	10
	<u>Section 5 – Contract Close Out</u>	13
	<u>Section 6 – Product/ Service Items</u>	13
	<u>Section 7 – Commodity Codes</u>	13
	<u>Section 8 – Attachments</u>	14
	<u>Section 9 – Users and Contacts</u>	16
	<u>Section 10 - Notifications</u>	17
	<u>Section 11 – Submit for Approval</u>	19
	<u>Section 12 – eSignature (DocuSign)</u>	20
	<u>Section 12.1 – Adding signers in eMACS</u>	20
	<u>Section 12.2 – For Contract Utilizing eSignature</u>	21
	<u>Section 12.3 – Historical Contracts</u>	22
	<u>Section 13 – Launch eSignature</u>	23
	<u>Section 13.1 – DocuSign</u>	24
	<u>Section 14 – Creating Contract from Sourcing Event</u>	25
<b>CHAPTER 2</b>	<b><u>AMENDMENTS</u></b>	30
	<u>Section 1 – Create the Amendment</u>	
<b>CHAPTER 3</b>	<b><u>RENEWALS/EXTENSIONS</u></b>	33
	<u>Section 1 - Renewals</u>	33
	<u>Section 2 – Extensions</u>	36
<b>APPENDIX</b>		
	<u>Appendix 1 – Attachments</u>	38
	<u>Section 1.1 – DocuSign Attachments</u>	38
	<u>Section 1.2 – Attachment Versioning</u>	39
	<u>Section 1.3 – Insurance Attachments</u>	39
	<u>Appendix 2 – Contract Close Out</u>	41
	<u>Appendix 3 – Contact Family</u>	45
	<u>Appendix 4 – Obligations</u>	46
	<u>Appendix 5 - Comments</u>	48
	<u>Appendix 6 – Tracking Contract Spend</u>	49
	<u>Section 1.1– Manual Payment Adjustment</u>	50
	<u>Appendix 7 – Novation/Vendor Name Change</u>	51
	<u>Appendix 8 – Printing Contracts from eMACS</u>	52
	<u>Appendix 9 – External Review Round (optional)</u>	53

## **PURPOSE**

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Document State Procurement Bureau's (SPB) instructions for administering contracts in eMACS Total Contract Manager (TCM).

### **Key Points**

- The TCM Manual may be utilized by Agencies for guidance when entering their contracts, keep in mind that SPB's standard business processes may differ from the agency's internal business processes.
- Within TCM DocuSign (eSignature) is used to route the document for signature. SPB's Process when entering in contracts utilizing DocuSign and not utilizing DocuSign differ. For example, historical contracts do not need to be signed, as there is already a signed copy of the contract. Or other contracts, agreements, purchase orders, not signed through eSignature.

# CHAPTER 1 – CREATING CONTRACTS

## Before Starting Your Contract

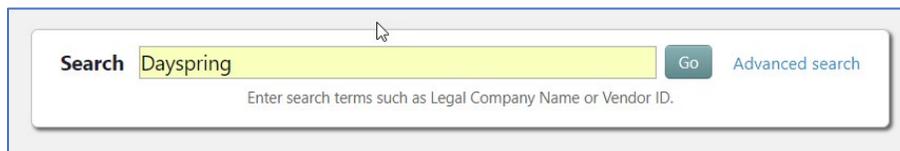
Contract Managers are not to award a contract to a vendor until the vendor has completed the Total Supplier Manager (TSM) Profile 2 vendor registration. When the vendor completes this registration process, it allows them to provide their current contact information, address information, and provide details that are required to do business with and receive payments from the State of Montana.

## Verifying the Status of the Awarded Vendor

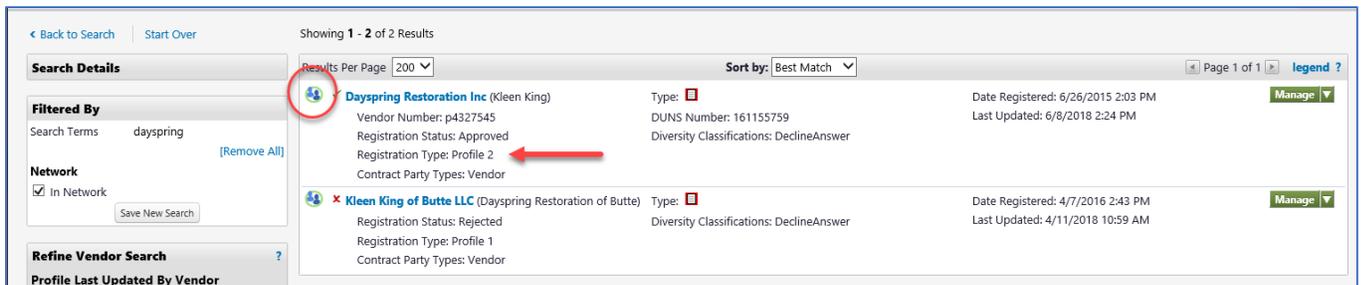
- Under the TSM (Vendors) module, search for the vendor.
  - **Vendors > Manage Vendors > Search for a Vendor**



- Enter search criteria. Select **Go**.



- Review search results to locate the correct vendor.
  - The Vendor's Registration Type must be Profile 2.
  - Another identifier is the icon next to the vendor name designates In-Network.



- If the vendor's Registration Type is not Profile 2, contact eMACS Support Staff to assist with inviting the vendor to Profile 2.

There are two ways to create a contract in the system. The first is from a Sourcing event and the second is in Total Contract Manager (TCM).

## Section 1 - Creating a New Contract from Create New Contract...

**Create New Contract...** is used when a contract is created outside of the Sourcing Module.

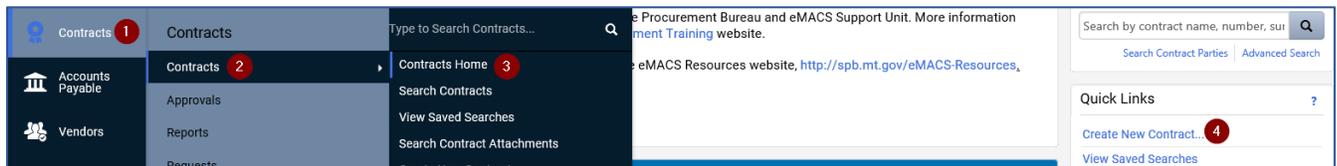
Examples of contracts not created from a sourcing event include but are not limited to:

- Sole Source
- Memorandums of Understanding (MOU)
- Inter-governmental
- Historical contracts (contracts created and signed outside of TCM).

1. In TCM, select **Create New Contract...**:
  - a. **Contracts > Contracts > Create New Contract...**, OR



- b. **Contracts > Contracts > Contracts Home**
      - i. On the right-hand side, find Quick Links, select **Create New Contract...**



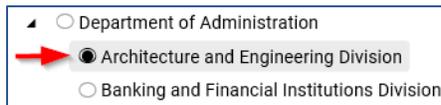
2. The wizard will begin, follow the prompts:
  - a. **Contract Name**: enter contract name
  - b. **Contract Type**: select **Non-Revenue Generating Contracts**
    - i. Most contract types used will be found under **Non-Revenue Generating Contracts**

A screenshot of the 'Create Contract' wizard. The 'About the Contract' step (Step 1 of 1) shows the 'Contract Name' field with 'Tires' entered and the 'Contract Type' field with a search filter. The 'Contract Types' selection screen shows two options: 'Non-Revenue Generating Contracts (inactive)' and 'Revenue Generating Contracts (inactive)'. The 'Non-Revenue Generating Contracts (inactive)' option is highlighted with a red box. The 'Selected Value' field is empty, showing 'No Value Selected'. There are 'Save Changes' and 'Close' buttons at the bottom.

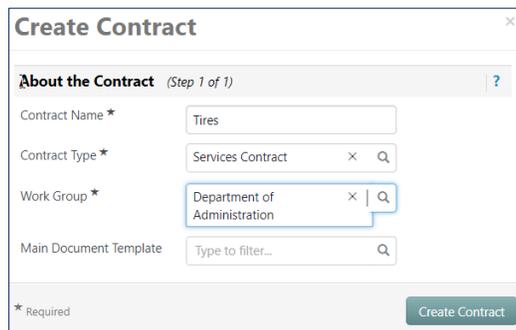
- c. Select applicable **Contract Type**

[Back to Chapter 1](#)

- i. Some contract types, such as Term Contract and Sole Source, must always be selected for those contracts. For a comprehensive list of contract types, see SPB TCM Contract Type Definitions.
- d. Select **Save Changes**
- e. Next on the **Create Contract** window additional fields will appear:
  - i. **Work Group:** enter the applicable Work Group (agency)
    - SPB Contracts**
      1. Term contracts - Work Group = State Procurement Bureau
      2. Agency contracts - Work Group = the requesting Agency
    - All Agency Contracts**
      3. All contracts -Work Group = your Division or Department
  - ii. Work Groups with "child workgroups"
    1. "Child workgroups" must be selected, e.g., Department of Administration contracts, choose applicable Division



- iii. **Main Document Template:** leave blank - not utilized
- f. Select **Create Contract**



## Section 2 – Entering contract information

### Section 2.1 - Contract Header

The Contract Number is generated automatically by the system and modified to follow SPB's Electronic File Naming Convention. Contract Name, Contract Type, and Work Group fields automatically populate with information previously entered in the contract wizard.

[Back to Chapter 1](#)

1. **Contract Number:** If contract(s) is a result of an event, edit contract number according to the established naming convention detailed below:
  - a. Modify event number by removing the first hyphen, event type, second hyphen, and first two numbers of fiscal year.

COR-IFB-2018-1234BM      becomes      COR18-1234BM

- b. If multiple contracts are awarded from the same event, use A, B, C to number the resulting contracts.

COR18-1234BM-A  
COR18-1234BM-B  
COR18-1234BM-C

If contract is not a result of an event, edit contract number according to the established naming convention detailed below:

- c. Modify contract number by removing the first hyphen, contract type, second hyphen, and first two numbers of fiscal year. Add Contracts Officer designator - initial(s).

DOA-SVSC-2019-0015      becomes      DOA19-0015V

2. **Contract Name:** leave contract title as is or modify if contract is a result of an event.
  - a. If contract is not a result of an event, enter Contract Name.
3. **Summary:** enter a short summary of the contract.
  - a. This information displays on the Contract Summary screen and provides users an overview of the contract without having to access and read contract attachments.
4. **Parent Contract:** enter the parent contract (if applicable)
5. **Internal Contract Status:** Not utilized
6. **Use eSignature for this contract:** Select **Yes** if utilizing eSignature for contract execution.
  - a. Select **No** for historical contracts or contracts signed without the eSignature process.
7. **Show on Vendor Portal:** Not utilized at this time
8. **Contract Parties:** Depending on how you create your contract Contracting State agency First Party AND vendor Second Party information auto-populate when contracts are created from sourcing events; only contact information for both parties needs to be added. When creating direct from TCM, the name of the State agency First Party populates. The Second Party Contact needs to be selected and contact information will need to be entered for both parties. Reference Appendix 10 to see how to add a Second Party.
  - a. If First- or Second Party contact or contact address information is not provided, SPB Contracts Officers will create a new entry for this information. Only SPB contracts officers can add contact information.
  - b. Agencies requiring contact information added to a contract must contact the eMACS Help Desk for assistance.

## **Section 2.2 Dates and Renewals**

1. Enter in your dates and renewals in this section of TCM.
  - a. **Start Date:** enter Start Date.
  - b. **Update Start Date Upon Execution:** if contract starts upon contract execution, enter a **Start Date**, then check **Update Start Date Upon Execution** box. System automatically replaces the provisional Start Date with date contract is fully executed.

[Back to Chapter 1](#)

[Back to Table of Contents](#)

- c. **End Date:** enter End Date
  - i. If it is a unique contract, still select an end date. Do not use **No Expiration** there are only a few exceptions that this is allowed.
- d. **Review Date/Term/Reviews Remaining:** Not utilized
- e. **Renewals Remaining:** enter number of renewals remaining on the contract
- f. **Automatically Apply Price File with Renewal:** leave option set to **No**.
- g. **Renewal Term:** enter renewal term based on number of renewals remaining
- h. **Auto-Renew:** leave option set to **No**.

- i. Select **Save Progress** at bottom of screen before continuing to next step.

### **Section 3 - Custom Contract Information**

1. Complete this section for ALL contracts.
  - a. **Project Manager:** Enter name of agency contract liaison; (semicolon) name of agency procurement official.
  - b. **Agency Contract Number:** Enter internal agency contract number if requested by agency.
  - c. **Existing Contract:** New contracts, select **No**; historical contracts, select **Yes**.
  - d. **Original Contract Fiscal Year:** Choose state fiscal year contract was originally established (NOTE: enter the fiscal year solicitation was created if the solicitation is created in one fiscal year and the contract is not executed until next fiscal year).
  - e. **Absolute End Date:** Enter maximum end date of contract if all renewals occur.
  - f. **IT Contract:** Choose **Yes** or **No**. If yes, enter **ITPR/AR Number**. If ITPR/AR number is unknown, enter **ITPR/AR approval date** (date the CIO signed the contract).
  - g. **Exclusive Contract:** This option will on show on certain contract types, such as Term Contracts.

[Back to Chapter 1](#)

- h. **Total Contract Value:** Enter Total value of the contract if all applicable renewals are fulfilled
  - i. Non-Revenue Generating Contracts = require total value of the contract.
  - ii. Revenue Generating Contracts = require total value of the contract.
- i. **Total Contract Value Details:** Enter any details regarding the Total Contract Value.
- j. **Current Contract Term Amount:** Enter current contract term amount
  - i. Fixed Amount Contracts = require current contract term amount.
  - ii. As-Needed Contracts = require an estimated amount for the current contract term; if unknown (e.g., statewide or cooperative contracts) enter **\$0.00**.
- k. **Contract Usage Type:**
  - i. As Needed = Cost is utilized on an As Needed basis
  - ii. Fixed = Cost associated with contract for the contract period
  - iii. No Cost = No cost to the State to utilize contract
- l. **Funding Source:** Enter source of funding for contract.
  - i. State: no additional fields appear.
  - ii. Federal: DUNS Number field appears. Not a required field
  - iii. Both: DUNS Number field appears. Not a required field
  - iv. Other: Funding Source Description field appears. This field requires a description of funding source for contract.
- m. **Cooperative Purchasing Contract:** Choose whether contract allows cooperative purchasing or not. Primarily used for Term, NASPO, and other cooperative contracts.
- n. **Montana Vendor:** If contractor's address (as listed in actual contract document) is in Montana, select **Yes**; if not, **No**.
- o. **Dark Money Declaration Required:** Dark Money declaration applies to all Executive Branch agency contracts that meet the following conditions:
  - i. Total Contract Value is over \$25,000 for services or \$50,000 for goods
  - ii. Executed date is on or after October 1, 2018
  - iii. Contract term is 24 months or longer or has the potential to have a term of 24 months or longer

\*Select Yes if all three conditions apply.
- p. **Dark Money Declaration/Disclosure Due:** Select the due date.
- q. **Category Codes:** Select appropriate Category Code assigned to Commodity Code associated with contract/solicitation. Refer to Commodity Code list for Category Code assigned to general commodity groups.
- r. **Prevailing Wage:** If prevailing wage is a contract requirement, select **Yes**; if not, **No**.
- s. **Does Retainage Apply:** If contract contains a withholding or retainage clause, select appropriate term (First, Last, or Every Payment). If no retainage, select **Retainage Does Not Apply**.
- t. **Does Gross Receipt Tax Apply:** If contract contains gross receipts tax clause, select **Yes**; if not, **No**.
- u. **Liquidated Damages Applicable:** If contract contains a liquidated damage clause, select **Yes**; if not, **No**.
- v. **Contract Security Required:** If contract performance security is a contract requirement select **Yes**; if not, select **No**.
- w. **Agency Custom 1 and Custom 2:** These are extra fields to be used for additional information if needed.

- i. An example is: SPB's Coop Unit will utilize this field to designate if an admin fee is due on a contract.
- ii. SPB also utilizes this field to enter Sole Source requisition numbers.

Agency Custom 1 ?	Admin Fee Yes	Agency Custom 1 ?	Admin Fee No
Agency Custom 2 ?		Agency Custom 2 ?	

## Section 4 – Insurance

The figures for the insurance limits are determined by the contract terms. If the certificate of insurance differs, you will need to contact them for clarification.

**Insurance**

Insurance Required \* ?

Begin Date \* ?

Expiration Date \* ?

Per Occurrence Limit \* ?

Aggregate/Not to Exceed \* ?

**Additional Insurance**

Additional Insurance Required \* ?

**Upload Insurance**

Upload Insurance to Attachment Section? \* ?  Yes  No

1. If **NO** insurance is required:
  - a. **Insurance Required:** select **No Insurance Required** from drop-down list
  - b. Continue to next contract section

**Insurance**

Insurance Required \* ?

No Insurance Required

Aircraft Liability

Automotive Liability

Cyber Security

Commercial General Liability

Fidelity

Liquor Liability

Professional Liability

Workers Compensation

Workers Comp Exemption

Umbrella Liability

Other

2. If insurance is required:

[Back to Chapter 1](#)

- a. **Insurance Required:** select pertinent insurance from drop-down list
- b. **Begin Date:** date insurance policy begins
- c. **Expiration Date:** date insurance policy expires

The screenshot shows the 'Insurance' section of a form. The 'Insurance Required' dropdown is set to 'Commercial General Liability'. The 'Begin Date' field contains '05/01/2018' and the 'Expiration Date' field contains '05/31/2018'. Both date fields have a calendar icon to their right. The 'Per Occurrence Limit' and 'Aggregate/Not to Exceed' fields are empty.

3. **Per Occurrence Limit:** Per Occurrence Limit field is required if any of the following insurance types are selected for Insurance Required field. If not applicable, enter a zero in this field.

- a. Aircraft Liability
- b. Automotive Liability
- c. Cyber Security
- d. Commercial General Liability
- e. Professional Liability
- f. Umbrella Liability
- g. Other

The screenshot shows the 'Insurance' section of a form. The 'Insurance Required' dropdown is set to 'Commercial General Liability'. The 'Begin Date' field contains '12/15/2017' and the 'Expiration Date' field contains '12/15/2018'. The 'Per Occurrence Limit' field is set to '1,000,000.00' and is highlighted with a red oval. The 'Aggregate/Not to Exceed' field is empty.

4. **Aggregate/Not to Exceed:** Aggregate/Not to Exceed limit field is required if any of the following insurance types are selected for Insurance Required field. If not applicable, enter a zero in this field.

- a. Aircraft Liability
- b. Automotive Liability
- c. Cyber Security
- d. Commercial General Liability
- e. Fidelity
- f. Liquor Liability
- g. Professional Liability
- h. Umbrella Liability
- i. Other

The screenshot shows the 'Insurance' section of a form. The 'Insurance Required' dropdown is set to 'Commercial General Liability'. The 'Begin Date' field contains '12/15/2017' and the 'Expiration Date' field contains '12/15/2018'. The 'Per Occurrence Limit' field is set to '1,000,000.00'. The 'Aggregate/Not to Exceed' field is set to '2,000,000.00' and is highlighted with a red oval.

5. **Property Damage Per Occurrence:** Property Damage Per Occurrence is required if Automotive Liability is selected for Insurance Required field. If not applicable, enter a zero in this field.

[Back to Chapter 1](#)

**Insurance**

Insurance Required \* ? **Automotive Liability** ▼

Begin Date \* ? 12/15/2017    
mm/dd/yyyy

Expiration Date \* ? 12/15/2018    
mm/dd/yyyy

Per Occurrence Limit \* ? 500,000.00 ▼

Aggregate/Not to Exceed \* ? 1,000,000.00 ▼

**Property Damage Per Occurrence \* ? 100,000.00 ▼**

6. **Other Insurance:** if **Other** is selected for Required Insurance field a description must be entered in the Other Insurance Description field.

**Insurance**

Insurance Required \* ? **Other** ▼

**Other Insurance Description \* ?**   
2000 characters remaining

Begin Date \* ? 12/15/2017    
mm/dd/yyyy

Expiration Date \* ? 12/15/2018    
mm/dd/yyyy

Per Occurrence Limit \* ? 500,000.00 ▼

Aggregate/Not to Exceed \* ? 1,000,000.00 ▼

7. **Additional Insurance:** when insurance information is added, a section titled **Additional Insurance** with a field titled **Additional Insurance Required**, appears.

- a. Use this field to add up to four additional insurance types or select **No Additional Insurance Required** to move to next section of the contract.
- b. Users are encouraged to upload required insurance and/or endorsement documents to the Attachment section of the contract. If **'Yes'** is selected, attach applicable insurance certificate(s) or endorsement(s).

**Insurance**

Insurance Required \* ? Commercial General Liability ▼

Begin Date \* ? 05/01/2018    
mm/dd/yyyy

Expiration Date \* ? 05/31/2018    
mm/dd/yyyy

Per Occurrence Limit \* ?  ▼

Aggregate/Not to Exceed \* ?  ▼

**Additional Insurance**

Additional Insurance Required \* ?  ▼

**Upload Insurance**

Upload Insurance to Attachment Section? \* ?  Yes  No

If contract is created from an event; proceed to **the next section, Section 6 - PRODUCT/SERVICE ITEMS.**

If not created from an event, proceed to **page 14, Section 7 - COMMODITY CODES.**

[Back to Chapter 1](#)

[Back to Table of Contents](#)

## Section 5 – Contract Close Out

This section is changed later after the contract has expired. Select **No** for Contract Close-out option. Or you can leave blank. This is where SPB's Contract Closeout form is completed and uploaded to the contract in the Attachments section.



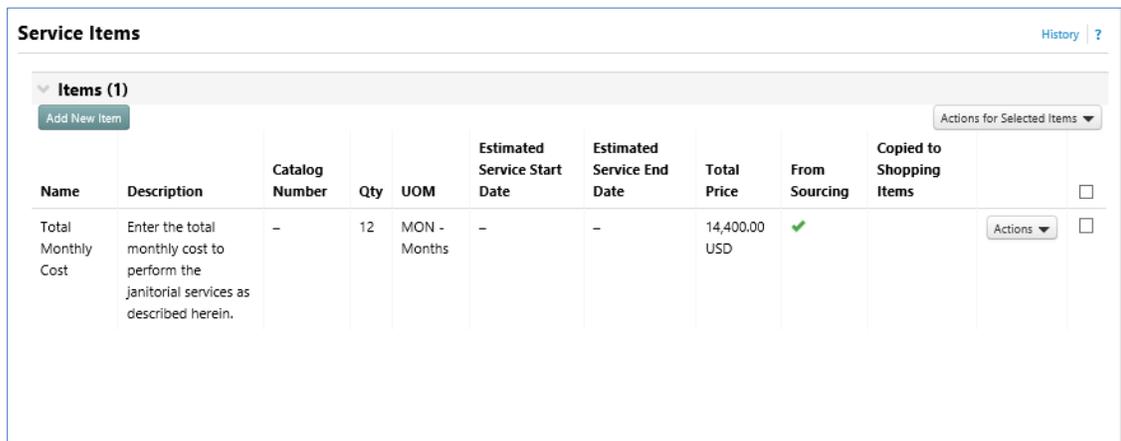
**Contract Closeout**

Contract Close-out   Yes  No

## Section 6 – Product / Service Items

For contracts created from a SOURCING EVENT ONLY. Product and/or Service Items will display in this section.

1. Verify items are correct.



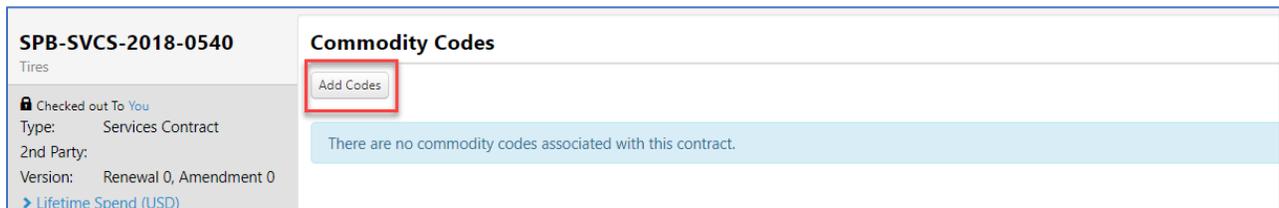
Name	Description	Catalog Number	Qty	UOM	Estimated Service Start Date	Estimated Service End Date	Total Price	From Sourcing	Copied to Shopping Items	Actions
Total Monthly Cost	Enter the total monthly cost to perform the janitorial services as described herein.	-	12	MON - Months	-	-	14,400.00 USD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Actions

Proceed to **page 15, Section 8 - ATTACHMENTS.**

## Section 7 – Commodity Codes

For contracts created from a sourcing event, commodity codes will automatically carry over.

1. If contract is not created from a sourcing event, add applicable commodity code(s).
  - a. Select **Add Codes.**



**SPB-SVCS-2018-0540**  
Tires

Checked out To You  
Type: Services Contract  
2nd Party:  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)

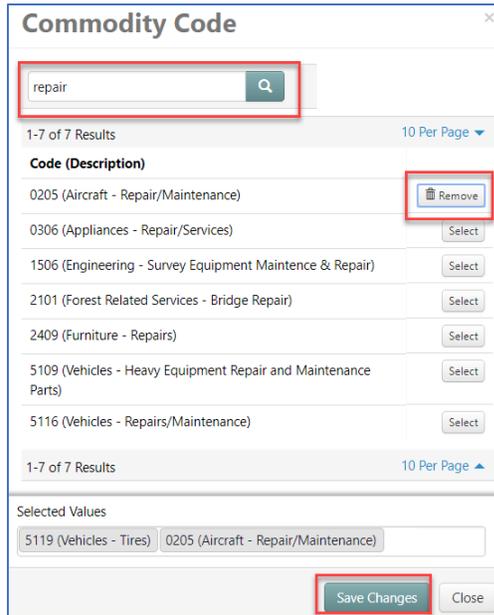
**Commodity Codes**

**Add Codes**

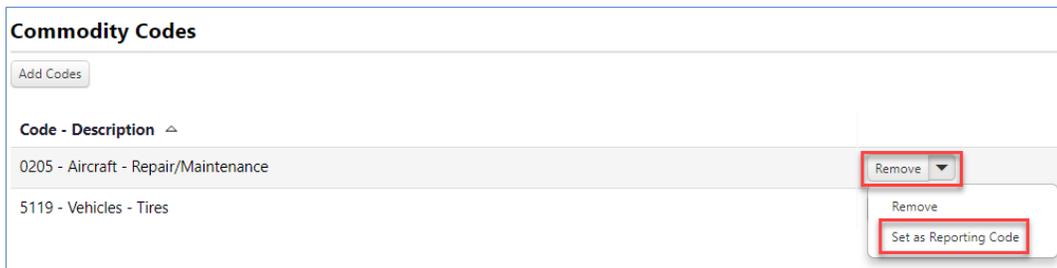
There are no commodity codes associated with this contract.

- b. Search for / select applicable commodity code(s).
- c. Select **Save Changes.**

[Back to Chapter 1](#)



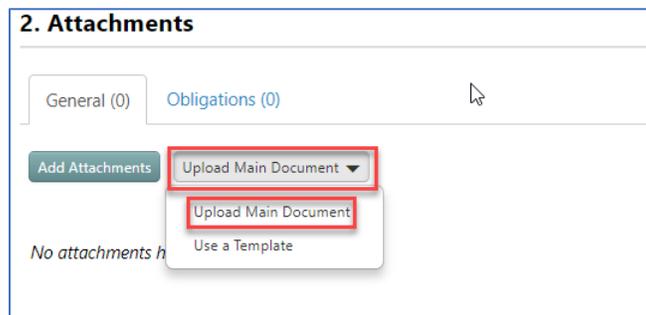
2. **Set as Reporting Code:** Set one commodity code as the Reporting Code. The Reporting Code is the code referenced when reporting on the contract.
  - a. Select the dropdown arrow next to **Remove**.
  - b. Select **Set as Reporting Code**. The system will update automatically.
  - c. Select **Next**.



Proceed to **next section, Section 8 - ATTACHMENTS.**

### **Section 8 - Attaching Documents by “Create New Contract...”**

1. Upload fully executed contract.
  - a. Select **Upload Main Document**. Select **Upload Main Document**.



- i. **Attachment Type:** Select **Add My Own**.
- ii. **File:** Select, **Select file**. Navigate to file location; select file.
- iii. **Print/Send with Contract:** Select **Yes**.

[Back to Chapter 1](#)

[Back to Table of Contents](#)

- iv. **Contract Summary Visibility:** Leave at **Use the Summary Configuration Settings.**
- b. Select **Save Changes.**

**Upload Main Document**

Attachment Type  Add My Own  Link

You can drag and drop a file into the gray box below.

File \*  Drop file to attach, or browse.

Maximum upload file size: 50.0 MB

Print/Send with Contract  Yes  No

Show on Vendor Portal  Yes  No

Contract Summary Visibility Use the Summary Configuration Settings

\* Required

2. Add additional attachment files utilizing SPB's Electronic File Naming Convention. The Print/Send with Contract field for all additional attachments should be set to No.

- a. Select **Add Attachments < Add Attachments**

**2. Attachments** History ?

General (1) Obligations (0)

Add Attachments

Print Order	Attachment	Print/Send with Contract	Version	Size	Date Uploaded	Actions
1	<a href="#">Contract_Template_Aug_2016.docx</a>	Yes	1	75 KB	5/30/2018 11:23:27 AM	<input type="button" value="Actions"/>

- i. **Attachment Type:** Select **Add My Own.**
- ii. **Files:** Select, **Select files...;** navigate to file, select file.
- iii. **Print Order:** Select file order.
- iv. **Print/Send with Contract:** Select **No.**
- v. **Contract Summary Visibility:** Leave as is.
- b. Select **Save Changes.**

**Add Attachments**

Attachment Type  Add My Own  Link  Create a Blank Word Document for Me

You can drag and drop multiple files into the gray box below. They will be attached in the order they appear.

Files \*  Drop files to attach, or browse.

Maximum upload file size: 50.0 MB

Print Order Last

Print/Send with Contract  Yes  No

Show on Vendor Portal  Yes  No

Contract Summary Visibility Use the Summary Configuration Settings

\* Required

[Back to Chapter 1](#)

Proceed to **page 21, Section 12 - ESIGNATURE**

## **Section 9 - USERS AND CONTACTS**

Users and Contacts are used for ALL contracts.

This section defines who has access to the contract and what they can see.

1. **Contract Manager:** The system defaults the contract creator's name here. Select **Edit Users** to change or add more contract managers. This area should always name the SPB Contracts Officer assigned to this contract.

Exception: For SITSD contracts, add the SITSD contract manager after your name.

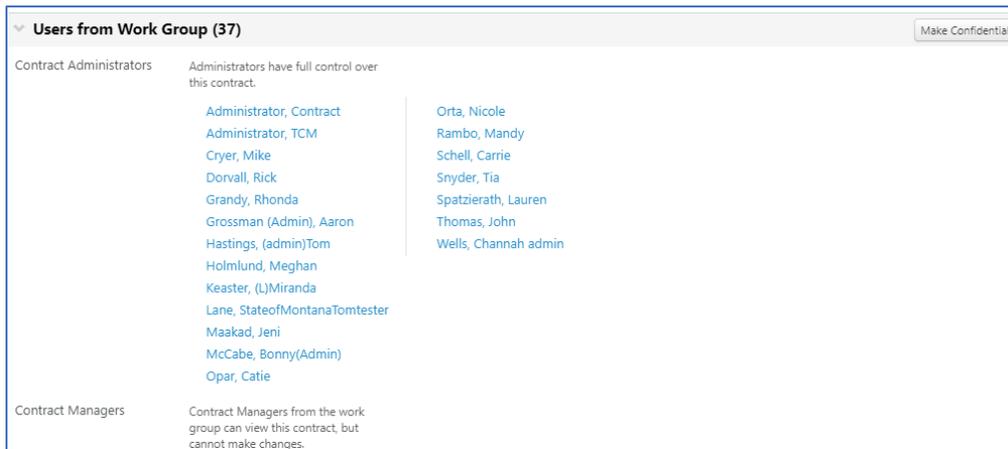
The screenshot shows two side-by-side panels. The left panel, titled '5. Users and Contacts', lists three roles: 'Contract Managers \*' (Full control over this contract), 'Voucher Approvers' (Approve associated vouchers), and 'Stakeholders' (View this contract and receive notifications). Each role has an 'Edit Users' button. The 'Contract Managers' role is currently assigned 'Steed, Shelly admin'. The right panel, titled 'Add Contract Users', provides options to add users: 'Individually by User' (with a dropdown showing 'Steed, Shelly admin'), 'By Role' (with a search field for 'Role Name'), and 'By Department' (with a search field for 'Department Name'). There are 'Save Changes' and 'Close' buttons at the bottom.

2. **Stakeholders:** Add name of Agency user.

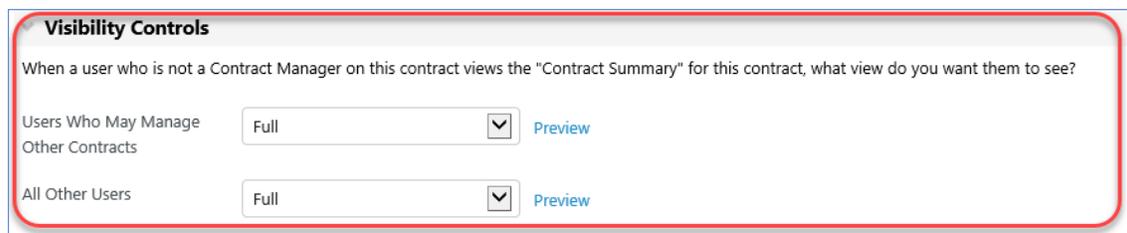
This screenshot is similar to the previous one but highlights the 'Stakeholders' role in the '5. Users and Contacts' panel, with its 'Edit Users' button circled in red. In the 'Add Contract Users' panel, the 'Individually by User' dropdown now shows 'Holmlund, Meghan' and a search suggestion: 'Begin typing for results or press the 'down' key.'.

3. Users from Work Group gives a full list of individuals assigned as contract administrators and contract managers.

[Back to Chapter 1](#)



4. Visibility Controls provides the ability to limit the amount of contract information available to users. Default settings is set to **Full** for both fields as shown below.



5. Select **Save Changes**.

## **Section 10 – NOTIFICATIONS**

Notifications are used for ALL contracts.

Notifications are set up to alert or notify contract managers and stakeholders of important events related to a contract, such as end dates and renewal dates. Advance notifications can be set up for end dates and renewal dates so that contract managers and stakeholders can act prior to an event occurring.

**NOTE:** Users - **NEVER** use the Work Group column when setting up Notifications. Selecting Work Group will send notifications to ALL users in an agency.

1. Set Notifications
  - a. **Notification Type:** Select appropriate **Notification Type** for contract managers, stakeholders.
  - b. **Contract Managers:** in the **Contract** column, select (at a minimum): **End Date – Advance Notices; End Date Passed; Renewal Date – Advance Notices; and Renewal Date Passed.**
  - c. **Stakeholders:** in the **Contract** column, select (at a minimum): **End Date – Advance Notices; End Date – Passed; Renewal Date – Advance Notices; and Renewal Date Passed.**
  - d. Select other notification types as needed

[Back to Chapter 1](#)

Notifications					
Who should receive each notification type?					
Notification Type	Contract Managers		Stakeholders		External Cor
	Contract	Work Group	Contract	Work Group	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Budget Exceeded	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Percentage Tiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount Tiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start Date - Advance Notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
End Date - Advance Notices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
End Date Passed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Renewal Date - Advance Notices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Renewal Date Passed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Advanced Notice Settings

- a. **Start Date:** Optional
- b. **End Date:** While renewals are available, set Advance Notice #1 to **90** days; Advance Notice #2 to **60** days; Advance Notice #3 to **30** days.
  - a. **IMPORTANT NOTE:** When contract has been renewed for the final term, set the Advance Notices to **180, 150, and 120** days to allow enough time to solicit a replacement contract.
- c. **Renewal Date:** Set Advance Notice #1 to **90** days, Advance Notice #2 to **60** days, Advance Notice #3 to **30** days.

Advance Notice Settings			
Leave a field blank to turn off that advance notice.			
Advance Notice For...	Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)
Start Date	30		
End Date	90	60	30
Renewal Date	90	60	30

- 3. Spend Tier Notification Settings: This is not currently being used.
- 4. Select **Save Changes**.
- 5. Proceed to **page 20, Section 11 - SUBMIT FOR APPROVAL**.

[Back to Chapter 1](#)

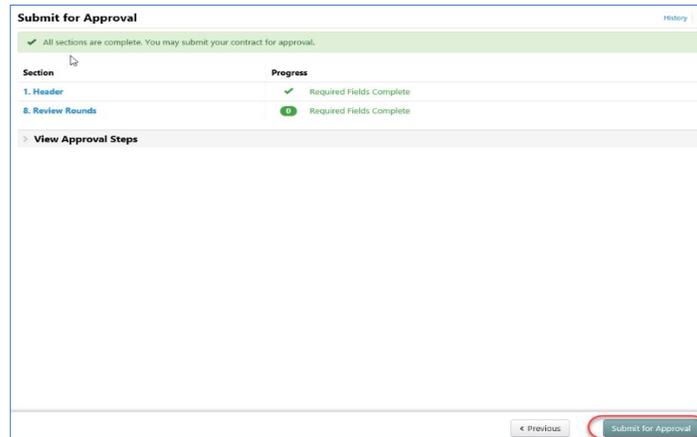
## Section 11 - SUBMIT FOR APPROVAL

Submit for Approval is used for ALL contracts.

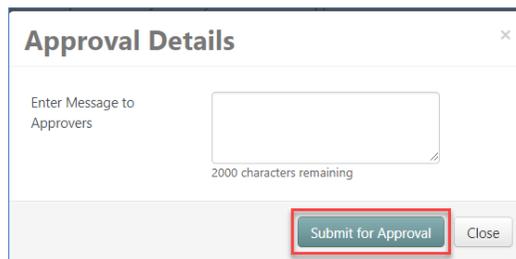
In Submit for Approval section, submit contract after all sections are completed (indicated by green checkmarks and numbers).

For contracts utilizing eSignature and historical contracts or contracts not signed through eSignature.

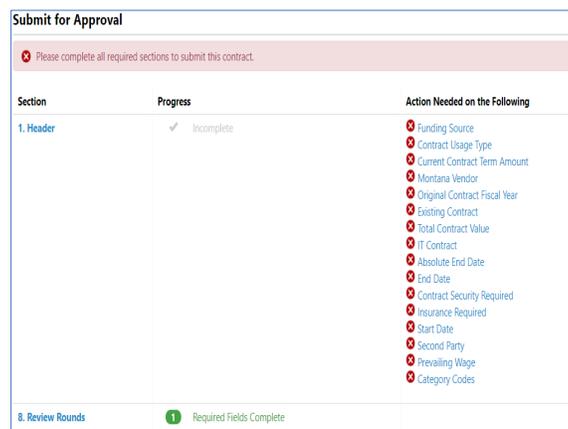
1. Select **Submit for Approval** in the bottom right corner of **Submit for Approval** screen.



2. **Enter Message to Approvers:** Not required.
3. Select **Submit for Approval** on **Approval Details** screen.



**NOTE:** All required sections in the contract must be completed prior to being submitted for approval. Any errors or missing required fields are indicated in red and must be corrected prior to submittal.



4. Select **View the Contract** on **Contract Submitted for Approval** screen to return to contract.
5. Select **Approvals** on left side.

[Back to Chapter 1](#)

✔ Contract Submitted for Approval

**Next Steps**  
What would you like to do next? Here are links to common actions:

- [View this Contract](#)
- [Create Another Contract](#)
- [Go to My Home Page](#)
- [Go to Contract Dashboard](#)

[View Approval Steps](#)

**Contract Summary**

Contract Number	SPB-SVCS-2017-0286	Time Zone	MDT/MST - Mountain Standard Time (US/Mountain)
Contract Name	Testing Cheat Sheet	Start Date	3/24/2017 12:00:00 AM
Contract Type	Services Contract	End Date	3/28/2017 11:59:59 PM
Work Group	State Procurement Bureau	Review Date	-
Internal Contract Status	Pending Approval		

## **Section 12 – ESIGNATURE (DOCUSIGN)**

DocuSign is used **ONLY** when the eSignature option is selected. When entering a historical contracts or contracts not being signed through eSignature, it will be marked 'No.' Per MOM Policy-Contract Management, all contracts/amendments issued by SPB will be signed through DocuSign.



Agency contract signers must be authorized to sign contracts on behalf of the agency; authorized signatories needed for each contract are supplied by the agency.

Language contained in the contract should be reviewed and agreed upon by ALL parties **PRIOR** to sending contract through eSignature process.

**NOTE: For attachments signed through DocuSign, the file size limit is 5MB. If the attachment exceeds 5MB, it will not appear as an attachment in the DocuSign completion email.**

Prior to adding signers, verify who will be signing the contract for both First and Second parties.

In most cases, signers must be manually entered as they are not parties to the contract (e.g. legal, CIO, Director, etc.).

### **Section 12.1 Adding signers in eMACS**

Add contract signers according to required signing order, e.g., legal, contracts officer, contractor, etc.:

1. Select on **Add Signer**.

**eSignature** History ?

Set up your eSignature signers below. You can launch the eSignature application once a signer is added and the contract is approved.

**Settings** Edit

Placement of Signature    Manual – Placed by Contract Manager

Block Fields

**Signers**

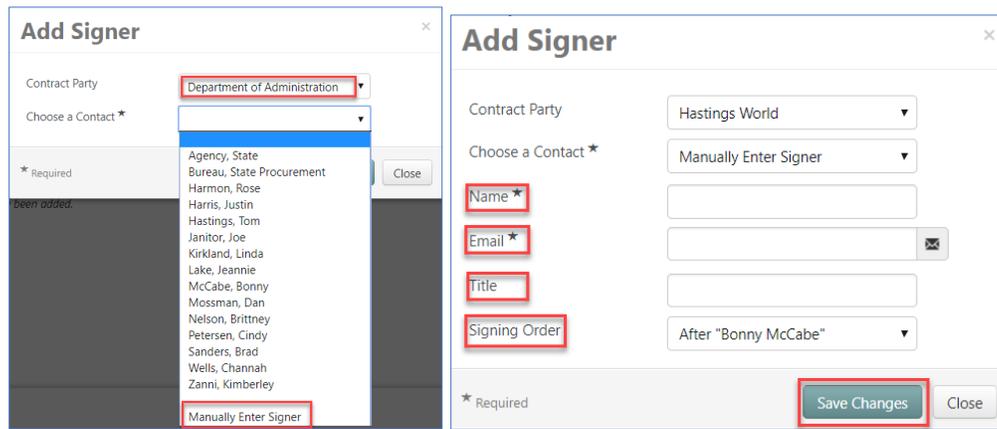
[Add Signer](#)

*No signers have been added.*

[Back to Chapter 1](#)

[Back to Table of Contents](#)

2. Under **Contract Party**: select the Contract Party.
3. **Choose a Contact**: select the **Contact**, or **Manually Enter Signer**.
4. When manually entering signer, enter **Name**, **Email**, and **Title**.
5. Adjust **Signing Order** (if necessary).
6. Select **Save Changes**.

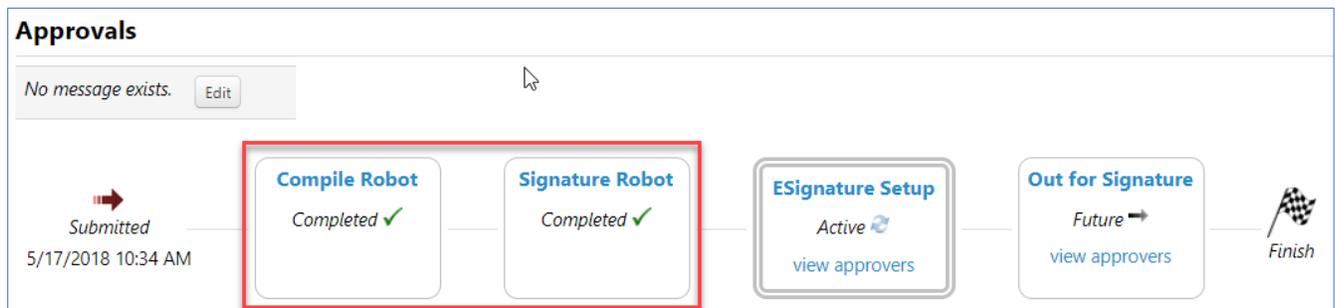


7. Continue until all signers are added and are in applicable order.
8. Select **Next**.

Proceed to **page 51, Appendix 5 - COMMENTS** or **page 17, Section 9 - USERS AND CONTACTS**.

## **Section 12.2 - For Contracts Utilizing eSignature**

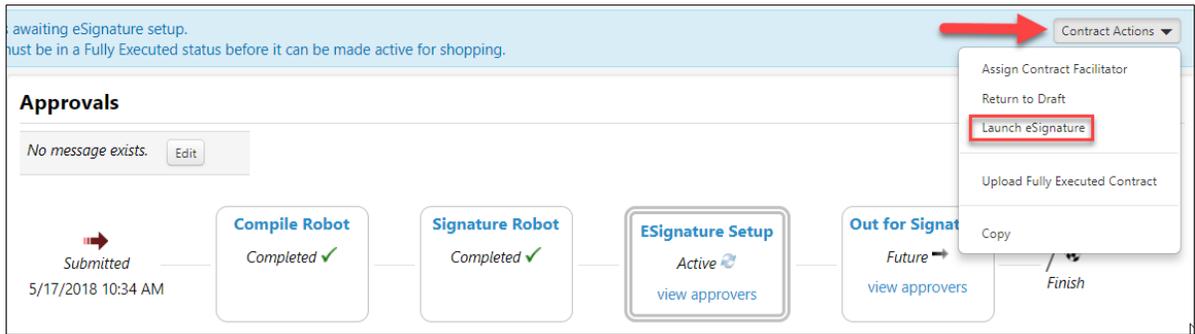
1. Prior to launching eSignature, the first two workflow steps; Compile Robot and Signature Robot, must be completed and have a green checkmark.



2. Select **Contract Actions**.
3. Select **Launch eSignature**.

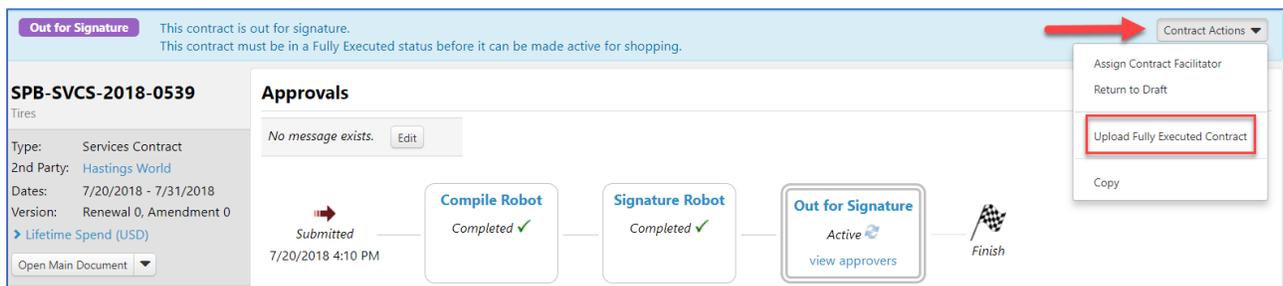
Proceed to **page 24, Section 13 - LAUNCH ESIGNATURE**.

[Back to Chapter 1](#)

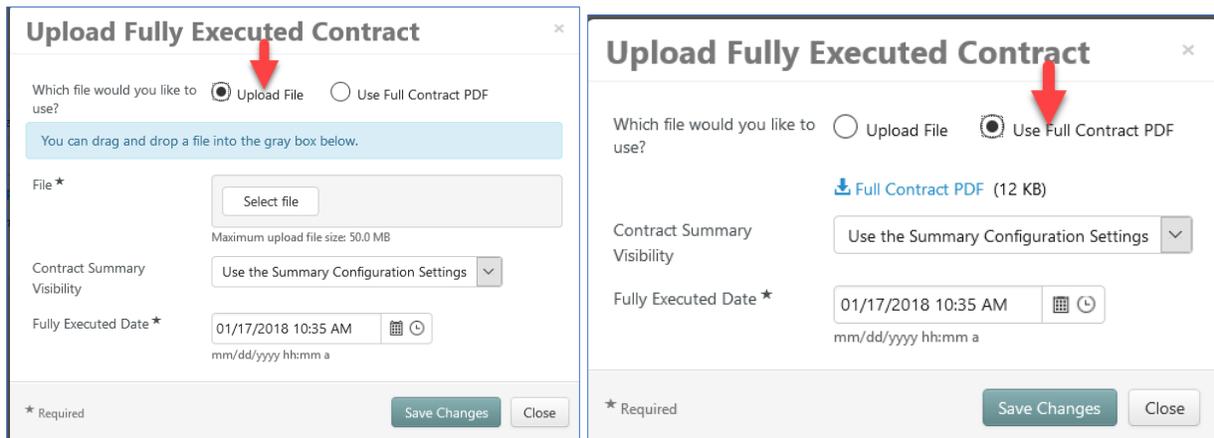


### Section 12.3 - For Historical Contracts / Contracts Not Signed Through eSignature

1. Prior to selecting **Upload Fully Executed Contract**, the first two workflow steps, Compile Robot and Signature Robot, must be completed and have a green checkmark.
2. Select **Contract Actions**.
3. Select **Upload Fully Executed Contract**.



4. Select **Upload File** or **Upload Fully Executed Contract**. Upload File allows user to upload contract document from a file directory. **Upload Fully Executed Contract** uses the same contract PDF used in the contract approval process.



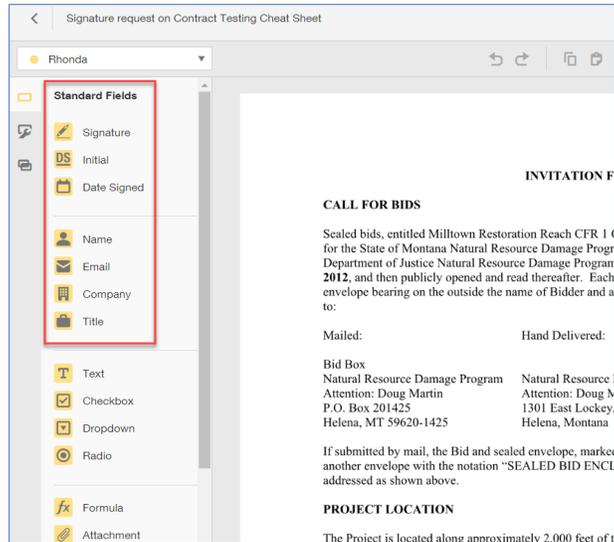
5. After contract is uploaded, contract status updates to *Executed: in Effect*.
6. The contract process is complete.

## Section 13 - LAUNCH ESIGNATURE

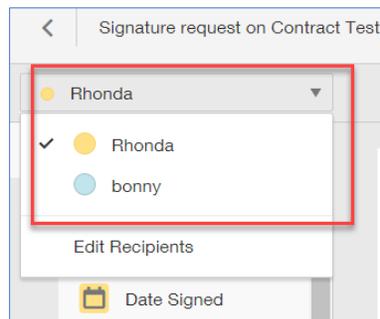
This step applies only when eSignature (DocuSign) is being used. Not used when entering historical contracts. Once Launch eSignature is activated, the contract moves into DocuSign where "fields" are added to applicable signature areas.

### Section 13.1 - DocuSign

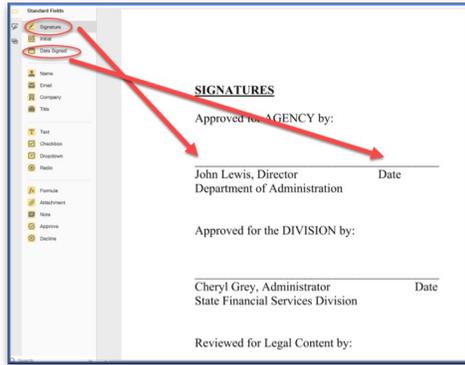
#### 1. Add fields to signature areas.



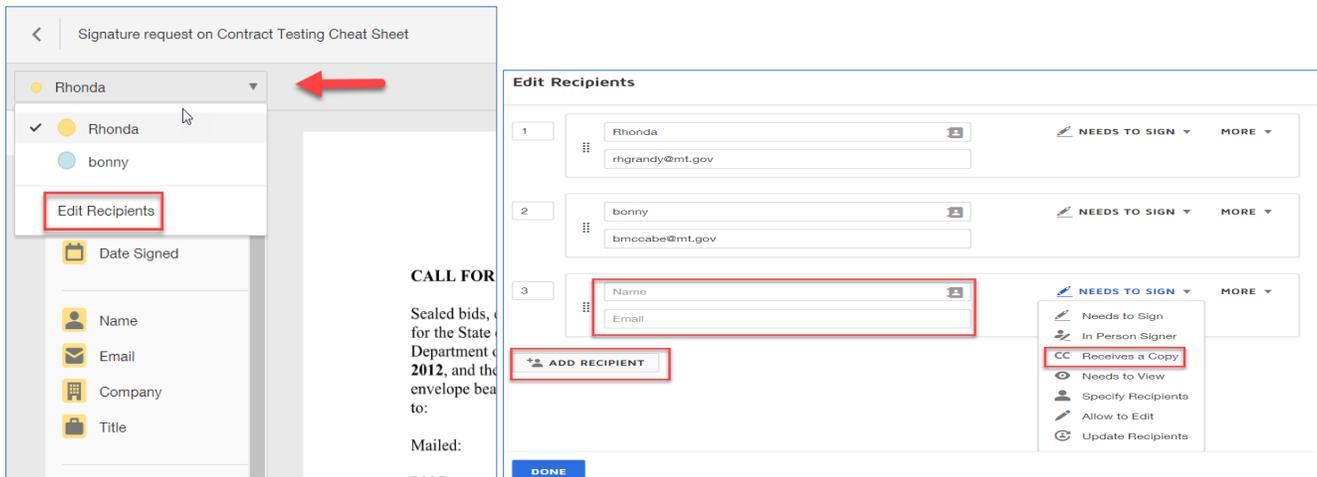
- In DocuSign, add applicable fields (Signature, Date Signed, Name, Title) to document by selecting a field from the menu.
- Drag and drop the field to applicable location within the document.
- For each contract signer, Select on **Recipient List** in upper left corner.
- Select next recipient until fields for all recipients have been added. Recipient List should populate with names entered on the eSignature page in TCM.



[Back to Chapter 1](#)



2. Individuals needing a copy of the fully executed contract can be sent a copy once all parties have signed the contract.
  - a. Access the Recipient list.
  - b. Select **Edit Recipients**.
  - c. Select **ADD RECIPIENT**.
  - d. Enter name and email information.
  - e. Select **NEEDS TO SIGN**.
  - f. Select **CC Receives a Copy**.
  - g. Select **Done**.



3. When document setup is complete:
  - a. Select **Send** in upper right corner.
  - b. Close DocuSign window.
4. In TCM, the contract status changes to "Out for Signature". Track contract location on the eSignature page by selecting gray Help text circles to view time / date contract was sent, viewed, and signed.

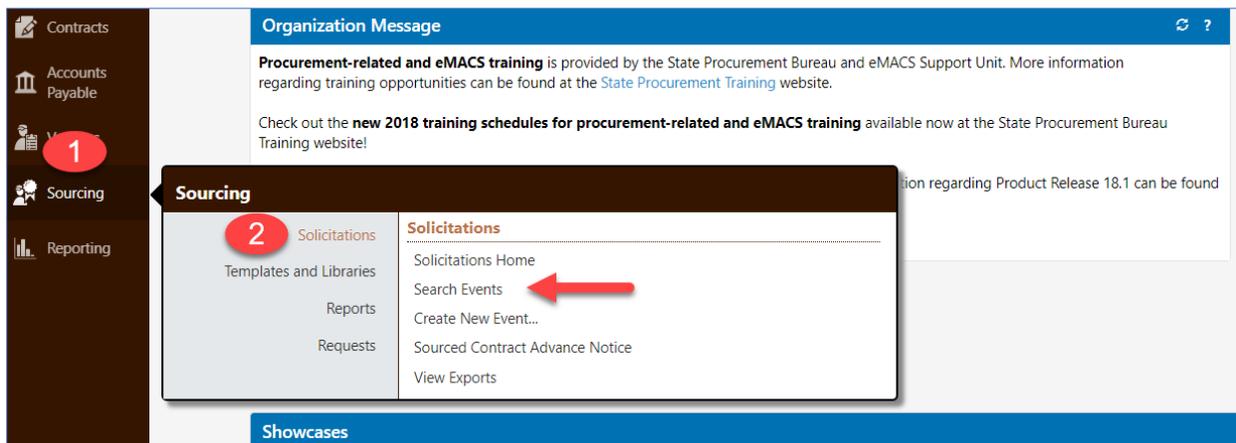
Signers						
Signing Order ▲	Status and Tracking ▲	Name ▲	Email ▲	Title ▲	Contract Party ▲	
1	Completed	John Thomas	jthomas@mt.gov	Senior Administrative Officer	-	
2	Completed		jbovington@mt.gov	Legal	Department of Labor and Industry	
3	Completed	Lori Tininenko	Lmintendo@bresnan.net	Owner	Lori Tininenko	
4	Sent	Galen Hollenbaugh	ghollenbaugh@mt.gov	Commissioner	Department of Labor and Industry	

**Note:** Once contract is fully executed, the signed document appears at the top of the **Attachments** page.

- Once all parties have signed the contract, the contract will be complete.

### Section 14 Creating Contracts from a Sourcing Event

- Under the Sourcing Module, search for the event.
  - Sourcing > Solicitations > Search Events**



- Enter search criteria. Select **Go**.

Search  ×  ▼

Enter search terms such as document numbers, vendors, and product information.

Go to: [advanced search](#)

- Select event from search results by selecting the **event title**.

[Back to Chapter 1](#)

MONTANA.GOV OFFICIAL STATE WEBSITE **TEST** Bonny McCabe 0.00 USD Search (Alt+Q)

Sourcing > Solicitations > Search Events > Search Events

Showing 1 - 1 of 1 Results All Dates

Search Details: Search Terms: Keyword: testing inviting vendors

Event Details:

Status	Event Details	Submitted Bids	Intending to Bid	No bids
Under Evaluation	Testing Inviting Vendors	1	1	0
	SPB-IFB2017-0282 Created			
	Invitation For Bid Release			
	Open 5/4/2018 3:30 PM MDT			
	Close 5/4/2018 4:30 PM MDT			
	Sealed Bid Open 5/4/2018 4:30 PM MDT			

4. Select on **Scenario Breakdown** link.

1 of 1 Results

This event is **Under Evaluation**. You may view responses. The response from **Garden City Janitorial** is Pending Award. You may view the **scenario breakdown**.

**Testing Inviting Vendors** SPB-IFB2017-0282

Type: **Invitation For Bid** Event Status: **Under Evaluation**

**Vendor Responses**

8 Invited Vendors

Progress	Response % Complete	Vendor Name	Total Bid
Pending Award	100%	Garden City Janitorial	140.00 USD
Event Not Viewed	-	AMDEC LTD	-

5. Select **Create Contract** next to the name of the awarded vendor.

**Award Scenario for Testing Inviting Vendors**

Awarded Total: 140.00 USD

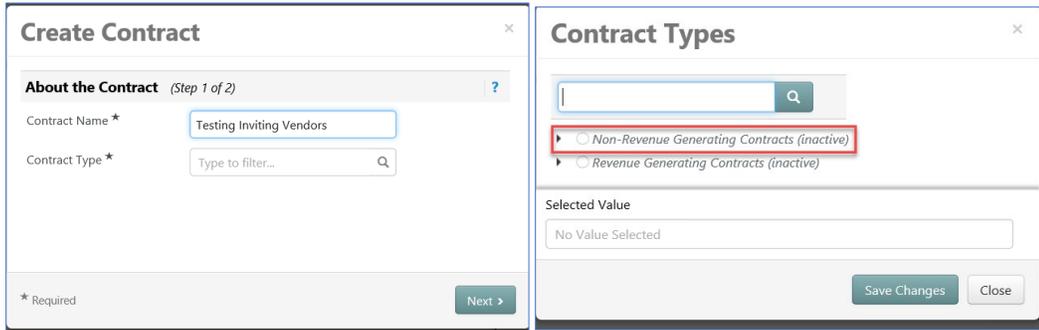
Item Description	Catalog Number	Quantity	Target Price	Unit Price
P1.1 Product Line Item #1		1	-	10.00

Vendor Total: 140.00 USD **Create Contract**

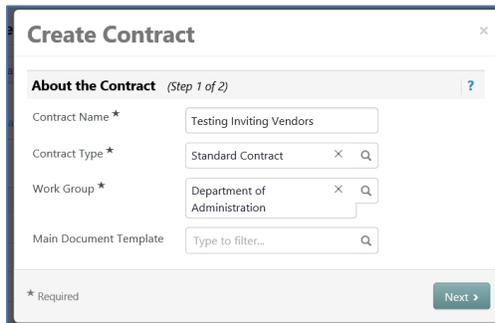
6. **Create Contract** window.

- When the window appears, under the **Contract Name**, leave the contract name as is or modify it.
- Contract Types**: Select on **Non-Revenue Generating Contracts**. Most contract types used will be found under **Non-Revenue Generating Contracts**.

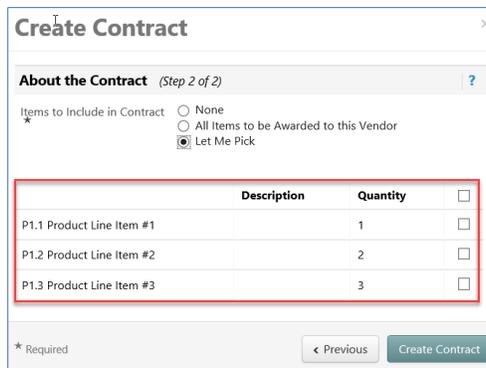
[Back to Chapter 1](#)



7. Select applicable **Contract Type**. Some contract types, such as Term Contract and Sole Source, must be selected for those types of contracts. For a comprehensive list of contract types, see SPB TCM Contract Type Definitions.
8. After selecting the **Contract Type**, the **Create Contract** window appears again, enter in the required information:
  - a. **Work Group**: enter the applicable **Work Group** (agency). Additional information below:
    - i. Term contracts - Work Group is State Procurement Bureau.
    - ii. Vendor contracts - Work Group is the requesting agency.
    - iii. Work Groups with "child workgroups" - "child workgroups" must be selected, e.g., Department of Administration contracts, choose applicable Division.
  - b. **Main Document Template**: leave blank.
  - c. Select **Next**.



9. Select the items to include in the contract by choosing the pertinent options.
  - a. If **Let Me Pick** is used, choose the applicable fields.
10. Select **Create Contract**. The system returns to event's **Award Scenario** page under Sourcing.



[Back to Chapter 1](#)

11. At the event's **Award Scenario** page:

- a. If event is awarded to multiple vendors, continue to **Create Contract** for other line items following the steps above, OR,
- b. Continue to build contract in TCM by selecting **Draft** contract link found under **Contract Number & Status**. Selecting the Draft contract link opens the contract's **Summary** page.

Under Evaluation The response(s) from Garden City Janitorial is Pending Award. Workflow Actions

### Award Scenario for Testing Inviting Vendors

Load Saved Scenario Export Remove Finalized Award

Scenario Navigator Scenario Breakdown Scenario Savings

Awarded Total: 140.00 USD

Vendor Total: 140.00 USD Create Contract

Item Description	Catalog Number	Quantity	Target Price	Unit Price	Contract Number & Status
P1.1 Product Line Item #1		1	-	10.00	SPB-STNDRD-2018-0532 Draft

12. At the contract's **Summary** page:

- a. Select **Go to Contract**.

### Summary of Contract # SPB-STNDRD-2018-0532

Header		Dates And Renewal	
Contract Name *	Testing Inviting Vendors	Start Date	-
Contract Type	Standard Contract	Update Start Date Upon Execution	✘
Work Group *	Department of Administration	End Date	-
First Party *	Department of Administration	Auto-Renew	✘
Second Party *	Garden City Janitorial	<b>Contract Managers</b>	
Internal Contract Status	-	Bonny McCabe	bmcabe@mt.gov +1 406-444-3322
Summary	No Text Entered		

Custom Contract Information

Insurance

Contract Closeout

Attachments

\* Required

Go to Contract Close

Refer back to **page 7, Section 2.1 - CONTRACT HEADER**.

## **Section 14. 1 - Attaching Documents from a Sourcing Event**

- Upload contract document.
  - a. Select **Upload Main Document**. Select **Upload Main Document**.
    - i. **Attachment Type**: Select **Add My Own**.
    - ii. **File**: Select, **Select file**. Navigate to file location; select file.
    - iii. **Print/Send with Contract**: Select **Yes**.
    - iv. **Contract Summary Visibility**: Leave at **Use the Summary Configuration Settings**.
  - b. Select **Save Changes**.

[Back to Chapter 1](#)

**Upload Main Document**

Attachment Type:  Add My Own  Link

You can drag and drop a file into the gray box below.

File **\***:

Maximum upload file size: 50.0 MB

Print/Send with Contract:  Yes  No

Contract Summary Visibility: Use the Summary Configuration Settings

\* Required

- Revise all additional attachment file names utilizing SPB's Electronic File Naming Convention. The Print/Send with Contract field for all additional attachments should be set to No.

Print Order	Attachment	Print/Send with Contract	Version	Size	Date Uploaded	Actions
1	SPB15-3167A-D_Aircraft Maintenance Final Signed Contract SPB15-3167A-D.pdf	Yes	1	586 KB	3/20/2018 5:21:46 PM	Actions
2	AMD_1_SPB15-3167A-D SPB15-3167A - D Executed.pdf	No	1	66 KB	3/20/2018 5:21:46 PM	Actions
3	AMD_2_SPB15-3167A-D SPB15-3167A-D Amend2 Executed.pdf	No	1	48 KB	3/20/2018 5:21:46 PM	Actions
4	INS_WC_17-18.pdf State of MT WC Col 17-18.pdf	No	1	1,232 KB	3/20/2018 5:21:46 PM	Actions

- Select **Actions** to right of attachment being updated.
- Select **Edit Properties**.

**2. Attachments**

General (6) Obligations (0)

1-6 of 6 Results

Print Order	Attachment	Print/Send with Contract	Version	Size	Date Uploaded	Actions
1	Contract_Template_Aug_2016.docx	Yes	1	73 KB	5/22/2018 2:38:04 PM	Actions
2	Attachment eMACS Test Links and Passwords.docx	No	1	12 KB	5/22/2018 8:54:26 AM	Actions
3	Attachment Contract Renewal Insurance Letters.pdf	No	1	386 KB	5/22/2018 8:54:26 AM	Actions
4	Attachment	No	1	12 KB	5/22/2018	Actions

**Edit Properties**

Attachment: Attachment

Name **\***: INS\_WC\_7\_1\_18

Print Order: After \*SPB-2018-0001BM\*

Print/Send with Contract:  Yes  No

Contract Summary Visibility: Use the Summary Configuration Settings

\* Required

- Name**: update document name.
- Print/Send with Contract**: Select **No**.
- Select **Save Changes**.

[Back to Chapter 1](#)

## CHAPTER 2 – AMENDMENTS

Contract amendments are created when changes affecting terms and conditions of the contract occur. Amendments can be created any time the contract is in an *Executed: In Effect status*. Examples of contract changes could include, cost – increasing/decreasing, scope of work, contract language. The Amendment functionality is not used for renewing a contract or in any case when the contract term is changed. Refer to **page 35, Chapter 3 – RENEWING AND EXTENDING THE CONTRACT** for that process.

### Section 1 - Create the Amendment

1. Search for / open contract to be amended.
2. Select **Contract Actions**.
3. Select **Amend**.

**Executed: In Effect** This contract is in effect through the end date of 6/30/2020 at 12:00 AM MDT.

**SPB-NRPO-2017-0280**  
Me Again!

Type: Purchase Order  
2nd Party: Hastings World  
Dates: 1/20/2017 - 6/30/2020  
Version: Renewal 1, Amendment 0  
> Lifetime Spend (USD)  
Open Fully Executed Contract

**Contract Header**

Contract Number *	SPB-NRPO-2017-0280	Parent Contract	-
Contract Name *	Me Again!	Internal Contract Status	-
Contract Type	Purchase Order	Use eSignature for this contract? *	Yes
Work Group *	Department of Administration		

Summary: Testing\_testing\_4\_5\_6

**Contract Actions**

- Check Out for Internal Edit
- Terminate
- Download Full Contract as PDF
- Amend**
- Renew
- Copy

4. In the **Amend Contract** pop-up, select **Yes** to **Include the latest attachment versions?** question.
5. Select **Yes**. A new contract record is created in "Draft" status.

**Amend Contract**

Amendments replace the original contract and retain the same contract number and type.

**Custom Field Changes**  
The custom fields configuration on this contract type has changed from the original contract  
Note: You may have added, deleted or modified custom fields.

Are you sure you want to create an amendment now?

Include the latest attachment versions?  Yes  No

**Yes** No

6. **Contract Header:**
  - a. On the Contract Header, **Use eSignature for this contract?** must be **Yes**.

**Contract Header**

Contract Number *	SPB-SVCS-2018-0404BM	Parent Contract	Type to filter...
Contract Name *	Bonny-Attachments	Internal Contract Status	
Contract Type *	Services Contract	Use eSignature for this contract? *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Work Group *	Department of Administration	Show on Vendor Portal ?	<input type="radio"/> Yes

7. **Attachments:**

- a. In the Attachments section, Select **Add Attachments** dropdown.
- b. Select **Add Attachments**.
- c. **Attachment Type**: Select **Add My Own**.
  - i. **Files**: Select, **Select file**. Navigate to file location; select file.
  - ii. **Print Order**: Select First. This assures the latest document will be at the top of the attachments.
  - iii. **Print/Send with Contract**: Select **Yes**.
  - iv. **Contract Summary Visibility**: Leave at **Use the Summary Configuration Settings**.
  - v. Select **Save Changes**.

**Add Attachments**

Attachment Type  
 Add My Own  
 Link  
 Create a Blank Word Document for Me

You can drag and drop multiple files into the gray box below. They will be attached in the order they appear.

Files \*  
 Select files...  
 Maximum upload file size: 50.0 MB

Print Order  
 First

Print/Send with Contract  
 Yes  No

Contract Summary Visibility  
 Use the Summary Configuration Settings

\* Required  
 Save Changes Close

- vi. Verify all additional attachments have **Print/Send with Contract** set to **No**. This is indicated by a red **X** on the attachment page. Only the amendment document should have a green check mark. When launching eSignature, the system selects the document with green check marks to send through DocuSign.

Print Order	Attachment	Print/Send with Contract	Version	Size	Date Uploaded	Actions
1	<a href="#">Contract_Amendment_Form.doc</a>	X	1	39 KB	5/31/2018 4:38:32 PM	Actions
2	<a href="#">Previous Fully Executed Contract PDF Me Again!.pdf</a>	X	1	313 KB	5/31/2018 4:38:32 PM	Actions
3	<a href="#">Contract_Revised_Aug2016.docx</a>	X	1	70 KB	5/31/2018 4:38:32 PM	Actions
4	<a href="#">ACA Language.docx</a>	X	1	17 KB	5/31/2018 4:38:32 PM	Actions
5	<a href="#">Contract_Amendment_Form 12.8.2017.doc</a>	✓	1	38 KB	5/31/2018 4:43:35 PM	Actions

[Back to Chapter 2](#)

8. **eSignature:**

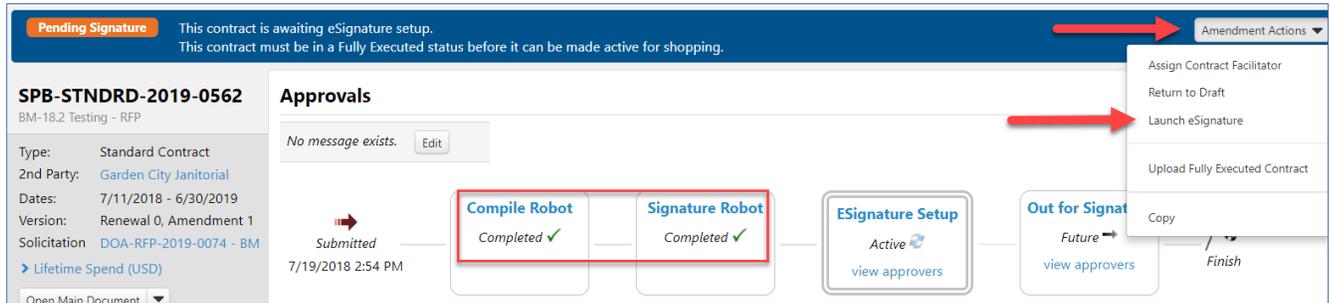
- a. Select on **eSignature**. Follow instructions on **page 29, CHAPTER 4 - ESIGNATURE** to set up document signers.

9. **Submit for Approval:**

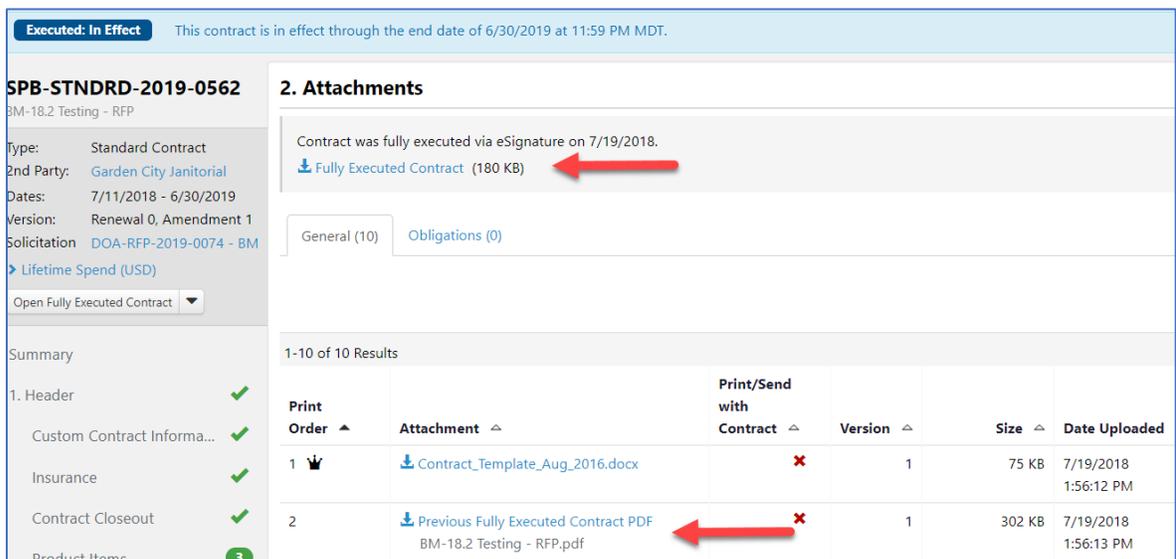
- a. Select **Submit for Approval**. Follow instructions on **page 36, CHAPTER 8 - SUBMIT FOR APPROVAL**. Follow instructions for contracts utilizing eSignature.

10. **Launch eSignature:**

- a. Select **Amendment Actions**. Select **Launch eSignature**. The DocuSign application opens to allow insertion of signature tags on the document.



- b. Follow instructions on **page 24, Section 13 - LAUNCH ESIGNATURE** to insert signature tags in document and start signature process.
- c. After all signature recipients have signed the document, the document uploads in the **Attachments** section. It is located at the top of the page labeled, **Fully Executed Contract**. Each time an amendment is completed, the document labeled as **Fully Executed Contract** is replaced with the new document. The previous document is moved below with other attachments, labeled **Previous Fully Executed Contract PDF**.



[Back to Chapter 2](#)

## CHAPTER 3 - RENEWALS/EXTENSIONS

When a contract is in an *Executed: In Effect* status, with renewals remaining, a renewal can be created. When the Renew functionality is selected, start and end dates on the renewed contract are pushed forward from the dates on the original contract, for the length of time indicated by the **Renewal Term**.

The renewal document can contain information regarding both the renewal and changes to a contract's terms and conditions. Navigate to **page 32, CHAPTER 2 – AMENDMENTS**, amendments are used only if there are changes to a contract's terms and conditions.

### Section 3.1 - Renewals

#### 1. Create the renewal

- a. Search for / open contract to be renewed.
- b. Select **Contract Actions**.
- c. Select **Renew**.

**Executed: In Effect** This contract is in effect through the end date of 7/28/2018 at 11:59 PM MDT.

**18.2 RFP Event Creation**  
18.2 RFP Event Creation

Type: IT Service  
2nd Party: Hastings 18.2  
Tom Hastings 4  
Dates: 7/5/2018 - 7/28/2018  
Version: Renewal 0, Amendment 0  
Solicitation 18.2 RFP  
Lifetime Spend (USD)

**Contract Header**

Contract Number *	18.2 RFP Event Creation	Parent Contract	-
Contract Name *	18.2 RFP Event Creation	Internal Contract Status	-
Contract Type *	IT Service	Use eSignature for this contract? *	Yes
Work Group *	TEST PROJECT	Show on Vendor Portal	Inherit From General Contract Setting: No

Contract Actions

- Check Out for Internal Edit
- Terminate
- Download Full Contract as PDF
- Amend
- Renew**
- Copy

- d. In the **Renew Contract** window, select **Yes** to create a renewal now. A new contract record is created in "Draft" status.

**Renew Contract**

Renewals replace the original contract and retain the same contract number and type.

Are you sure you want to create a renewal now ?

Yes No

#### 2. Contract Header:

- a. Use eSignature for this contract? must be **Yes**.

**Contract Header**

Contract Number *	SPB-SVCS-2018-0404BM	Parent Contract	Type to filter...
Contract Name *	Bonny-Attachments	Internal Contract Status	
Contract Type *	Services Contract	Use eSignature for this contract? *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Work Group *	Department of Administration	Show on Vendor Portal	<input type="radio"/> Yes

- b. **Dates and Renewal:** When Renew is selected from the Contract Actions menu, the Start and End dates on the renewed contract are pushed forward from the dates on the original contract, for the length of time indicated by the Renewal Term. In addition, the Renewals Remaining count decreases each time the contract is renewed.

**Before:**

Dates and Renewal		
Time Zone *	MDT/MST - Mountain Standard Time (US/Mountain)	Renewals Remaining 1
Start Date *	7/5/2018 12:00:00 AM	Automatically Apply Price File with Renewal No
End Date *	Expires On 7/28/2018 11:59:59 PM	Renewal Term 1 Months
Review Date	-	Auto-Renew No
Review Term	-	Renewal Created On 7/20/2018 9:31 AM MST

**After:**

Dates and Renewal		
Time Zone *	MDT/MST - Mountain Standard Time (US/M)	Renewals Remaining 0
Start Date *	07/29/2018 12:00 AM mm/dd/yyyy hh:mm a <input type="checkbox"/> Update Start Date Upon Execution	Automatically Apply Price File with Renewal <input type="radio"/> Yes <input checked="" type="radio"/> No
End Date *	<input checked="" type="radio"/> Expires On <input type="radio"/> No Expiration 08/28/2018 11:59 PM mm/dd/yyyy hh:mm a	Renewal Term 1 Months
Review Date		Auto-Renew <input type="radio"/> Yes <input checked="" type="radio"/> No
Review Term		Renewal No. 1
Reviews Remaining		

**3. Attachments**

When the signature process has been completed for renewals, the system uploads the new fully executed document to the Attachments section replacing the current Fully Executed Contract with the new document. A copy of the current Fully Executed Contract should be saved and uploaded as an attachment prior to launching eSignature.

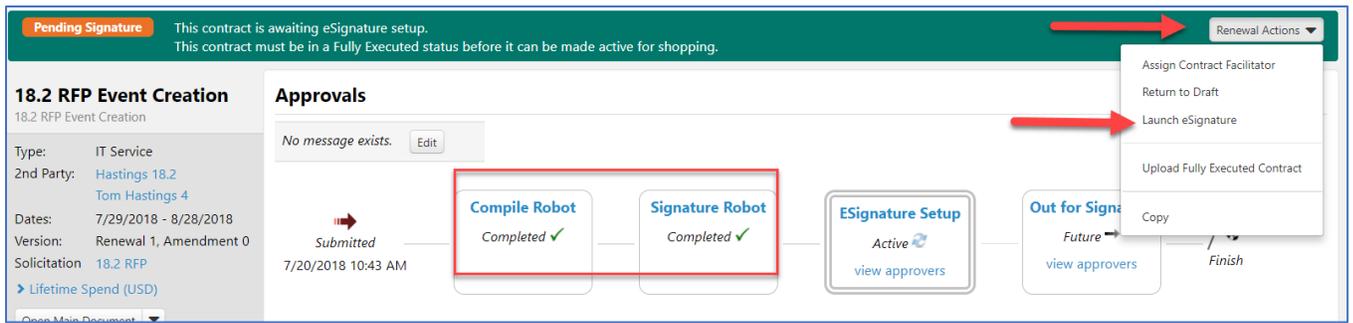
Upload a copy of the current Fully Executed Contract and the new Renewal document:

- In the **Attachments** section, select **Add Attachments** dropdown.
- Select **Add Attachments**.
- Attachment Type:** Select **Add My Own**.
- Files:** Select, **Select file**. Navigate to the file location; select file.
- Print/Send with Contract:** Select **Yes**.
- Print Order:** Select **First**. This assures the latest document will be at the top of the attachments.
- Contract Summary Visibility:** Leave at **Use the Summary Configuration Settings**.
- Select **Save Changes**.

- i. Verify all additional attachments have Print/Send with Contract set to No. This is indicated by a red X. Only the amendment document should have a green check mark. When launching eSignature, system picks up document with green check mark to send through DocuSign.

Print Order	Attachment	Print/Send with Contract	Version	Size	Date Uploaded	Actions
1	<a href="#">Contract_Amendment_Form.doc</a>	X	1	39 KB	5/31/2018 4:38:32 PM	Actions
2	<a href="#">Previous Fully Executed Contract PDF Me Again!.pdf</a>	X	1	313 KB	5/31/2018 4:38:32 PM	Actions
3	<a href="#">Contract_Revised_Aug2016.docx</a>	X	1	70 KB	5/31/2018 4:38:32 PM	Actions
4	<a href="#">ACA Language.docx</a>	X	1	17 KB	5/31/2018 4:38:32 PM	Actions
5	<a href="#">Contract_Amendment_Form 12.8.2017.doc</a>	✓	1	38 KB	5/31/2018 4:43:35 PM	Actions

4. **eSignature:**
  - a. Select **eSignature**. Follow instructions on **page 21, Section 12 - eSignature** to set up document signers.
5. **Submit for Approval:**
  - a. Select **Submit for Approval**. Follow instructions on **page 20, Section 11 - Submit for Approval**. Follow instructions for contracts utilizing eSignature.
6. **Launch eSignature:**
  - a. Select **Renewal Actions**. Select **Launch eSignature**. The DocuSign application opens to allow insertion of signature tags on the document.



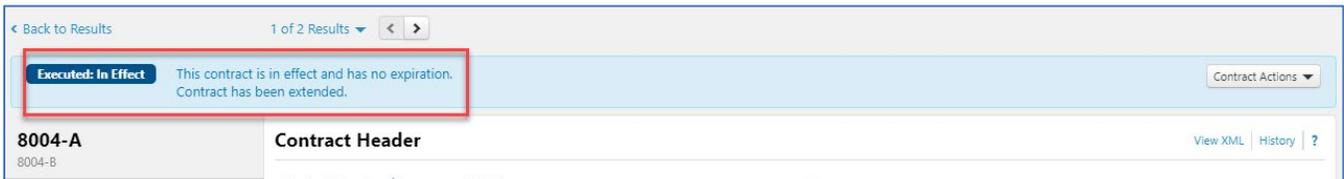
- b. Follow instructions on **page 24, Section 13 - Launch eSignature** to insert signature tags in document and start signature process.

Once all signature recipients have signed the document, it is uploaded in the Attachments section. It will appear at the top of the page labeled **Fully Executed Contract**. If an amendment is done after this renewal, the previous document is moved below with other attachments and labeled **Previous Fully Executed Contract**. The Contracts Manager should manually add the previous document to the Attachments section prior to the new renewal being processed.

### **Section 3.2 – Extensions**

Users can extend the end dates of contracts in *Executed: In Effect*, *Executed: Future*, or *Expired* status. It allows contracts to remain in effect while a renewal, amendment, or a new contract is being created.

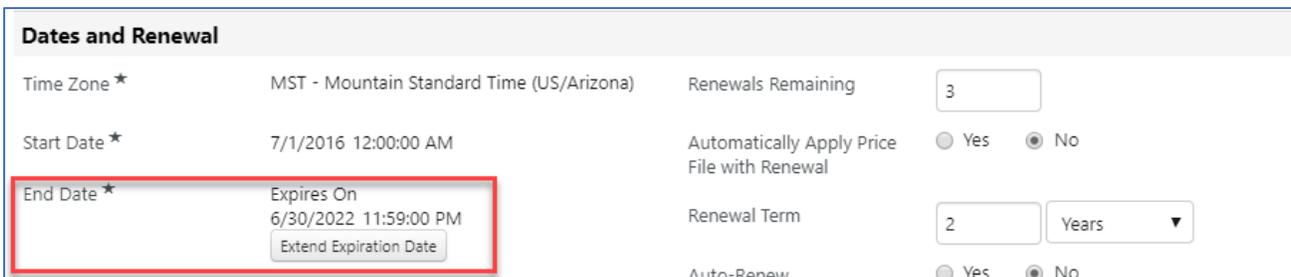
1. A contract with an end date cannot be changed to one without an end date, nor can a *Superseded* contract end dates be extended.
2. Extending end dates on *Expired* contracts changes the contract status from *Expired* to *Executed: In Effect*.
3. A note next to the contract status at the top of the contract page indicates that a contract has been extended.



4. The **Contract Term Extended** field on Advanced Search allows you to search for extended contracts.

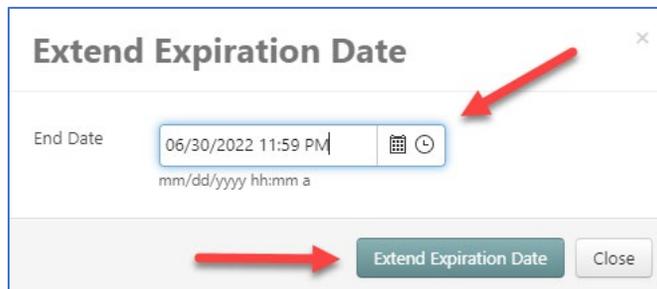
### **To extend a contract date:**

1. Select **Contract Actions**, select **Check Out for Internal Edit**.
2. In the **Dates and Renewal** section, End Date area, select **Extend Expiration Date**.



[Back to Chapter 3](#)

3. In the **Extend Expiration Date** window, enter the new **End Date**.
4. Select **Extend Expiration Date**.



[Back to Chapter 3](#)

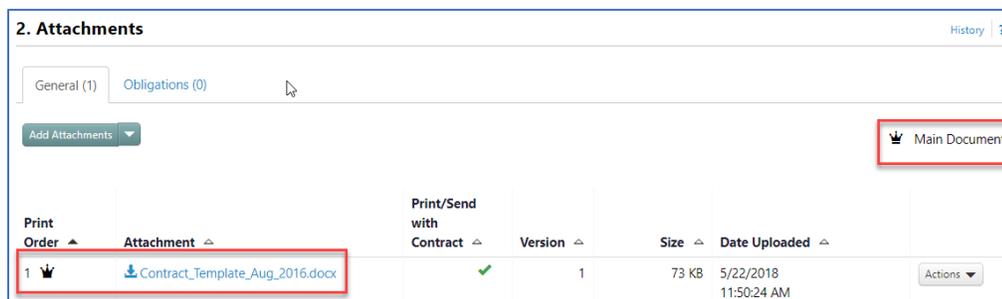
# APPENDIX

## Appendix 1 - ATTACHMENTS

The Attachments section is used to manage all files linked to the contract, i.e., amendments, renewals, insurances, security, correspondence, renewal justifications, etc. SPB's Contract File Checklist provides a complete list of documents that must be saved in the Attachments section of each contract record.

Prior to being uploaded, files MUST be saved utilizing SPB's Electronic File Naming Convention. Make sure that the file names are no longer than 80 characters and there are NO special characters.

The fully executed contract document is designated as the Main Document. It's displayed in the Attachments screen with a crown icon next to it.



- Refer to **page 21, Section 12 - E-SIGNATURE**.

### Section 1.1 - DocuSign Attachments

For attachments signed through DocuSign, note the following:

1. Supported Fonts: When uploading a document into DocuSign, the conversion process to "flatten" the document also looks at the font type chosen. Supported fonts are:

Arial	Georgia	Trebuchet
ArialNarrow	Helvetica	Verdana
Calibri	LucidaConsole	OcrA
CourierNew	Tahoma	MSGothic, and
Garamond	TimesNewRoman	MSMincho

2. It is suggested to convert attachments to PDF format **prior** to being sent through DocuSign. DocuSign tends to convert images and fonts to other objects.
3. File size limit is 5MB. If an attachment exceeds 5MB, it will not appear as an attachment in the DocuSign completion email.

## Section 1.2 - Attachment Versioning

Version	Attachment File	Size	Date Uploaded	Changed By	Comments
2 (Latest)	<a href="#">Insurance Versions</a> Ins_GL_AL WC 3.1.20.PDF	43 KB	6/27/2019	(admin)Tom Hastings	This insurance is for the year 2020
1	<a href="#">Insurance Versions</a> Ins_GL_AL WC 3.1.19.PDF	60 KB	6/27/2019	(admin)Tom Hastings	-

SPB utilizes the Attachment Version functionality to manage multiple versions of contract files. As a file changes, the new version (file) of the existing attachment is uploaded, and an optional comment added. The file name of each version can differ, but the display name of the file is the same across all versions of the file.

Each uploaded version is saved and can be accessed by selecting Version History from the Actions dropdown button. It displays each version of the file that was uploaded. Older versions of the attachments can be viewed by selecting the Display Name to open that version.

## Section 1.3 - Insurances – Attachment Version

Currently, attachment versioning is used to manage insurance documents. Once the initial insurance document is uploaded, the **Display Name** is created, and from that point forward, all insurance documents are uploaded to that attachment file.

1. In the contract's Attachment section, upload the initial insurance attachment.
  - a. Select on **Add Attachments**. Select **Add Attachments**.
  - b. **Attachment Type**: Add My Own
  - c. **Files**: Select, **Select Files**. Navigate to file location; select file.
  - d. **Print Order**: Last
  - e. **Print/Send with Contract**: No
  - f. **Show on Vendor Portal**: No
  - g. **Contract Summary Visibility**: Use the Summary Configuration Settings
2. Select **Save Changes**, OR:

**Add Attachments**

Attachment Type  
 Add My Own  
 Link  
 Create a Blank Word Document for Me

You can drag and drop multiple files into the gray box below. They will be attached in the order they appear.

Files \*  
Select files...  
Maximum upload file size: 50.0 MB

Print Order  
Last

Print/Send with Contract  
 Yes  No

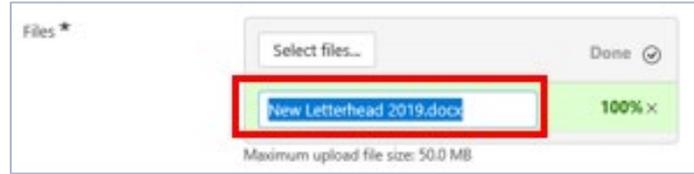
Show on Vendor Portal  
 Yes  No

Contract Summary Visibility  
Use the Summary Configuration Settings

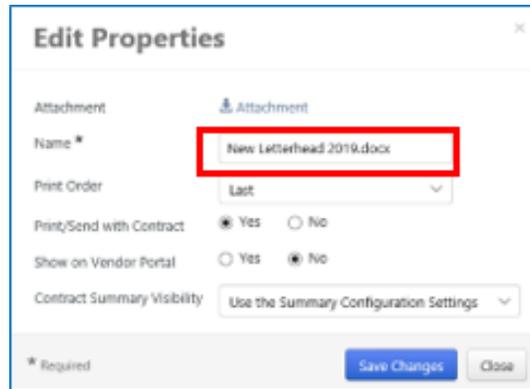
\* Required Save Changes Close

[Back to Appendix 1](#)

3. When saving your first document you can change the title of the Document so that it will be your Main name.



- a. Add the **Display Name**. To the right of the uploaded attachment, Select on **Actions**.
- b. Select **Edit Properties**.
  - i. In the **Name** field, enter Insurance.
  - ii. Select **Save Changes**



4. Currently and in the future, upload all insurance documents to this attachment header.
  - a. Select the **Actions** dropdown to the right of the Insurance attachment.
    - ii. Select **Upload New Version**. Select, **Select file**. Navigate to file location; select new file.
    - iii. **Comments**: Add comments regarding the new version in the **Comments** field.
    - iv. Select **Save Changes**.

[Back to Appendix 1](#)

## Appendix 2 - Contract Closeout

Once a contract has completely expired or been terminated, it must be closed out. The closeout process requires the Contracts Officer to send the *Contract Closeout* form to the agency's Contract Manager to fill out and return. The Contracts Officer then accesses TCM and "completes" the contract, eventually moving the contract into **Archive** status.

1. Expired Contracts
  - a. Search for / open contract.
  - b. Select **Contract Actions**, select **Check Out for Internal Edit**.
  - c. Select **Contract Actions** again, select **Complete**.

This contract expired on 6/30/2017 at 12:00 AM MDT.

**DOA15-3066V**  
Interruptible Natural Gas/WBI

Type: Standard Contract  
2nd Party: Rainbow Gas Company  
Dates: 7/1/2015 - 6/30/2017  
Version: Renewal 0, Amendment 0  
Lifetime Spend (USD)  
Open Main Document

**Contract Header**

Contract Number \* DOA15-3066V  
Contract Name \* Interruptible Natural Gas/WBI  
Contract Type \* Standard Contract  
Work Group \* Department of Administration

Parent Contract -  
Internal Contract Status -  
Use eSignature for this contract? \* No  
Show on Vendor Portal  Inherit From General Contract Settings -- Current Setting: No

Summary: Provides an interruptible natural gas supply, on a dry basis to MSU Billings, Pine Hills Youth Correctional Facility and Montana Women's Prison-Billings.

**Contract Parties**

Name	Currently Visible	Type	Contact	Contract Address
Department of Administration		First Party (Primary)	Rick Donvall	125 North Roberts Room 165 Helena, MT, 59620
Rainbow Gas Company	✗	Second Party (Primary) <input type="checkbox"/>	Jolene Erdman	919 S 7th Street, Suite 405 Bismarck, ND, 58504 US

**Dates and Renewal**

Time Zone \* MDT/MST - Mountain Standard Time (US/Mountain)  
Start Date \* 7/1/2015 12:00:00 AM  
End Date \* Expires On 6/30/2017 12:00:00 AM  
Review Date 2/15/2017 8:00:00 AM  
Review Term -

Renewals Remaining 0  
Automatically Apply Price File with Renewal No  
Renewal Term -  
Auto-Renew No

★ Required

Contract Actions

- Check Out for Internal Edit
- Complete
- Download Full Contract as PDF
- Amend
- Copy

2. Contract status changes from Expired to Complete.

< Back to Results 1 of 1 Results >

**Complete** The contract is no longer in effect and is ready to be archived.

**DOA15-3066V**  
Interruptible Natural Gas/WBI

Type: Standard Contract  
2nd Party: Rainbow Gas Company  
Dates: 7/1/2015 - 6/30/2017  
Version: Renewal 0, Amendment 0  
Lifetime Spend (USD)  
Open Main Document

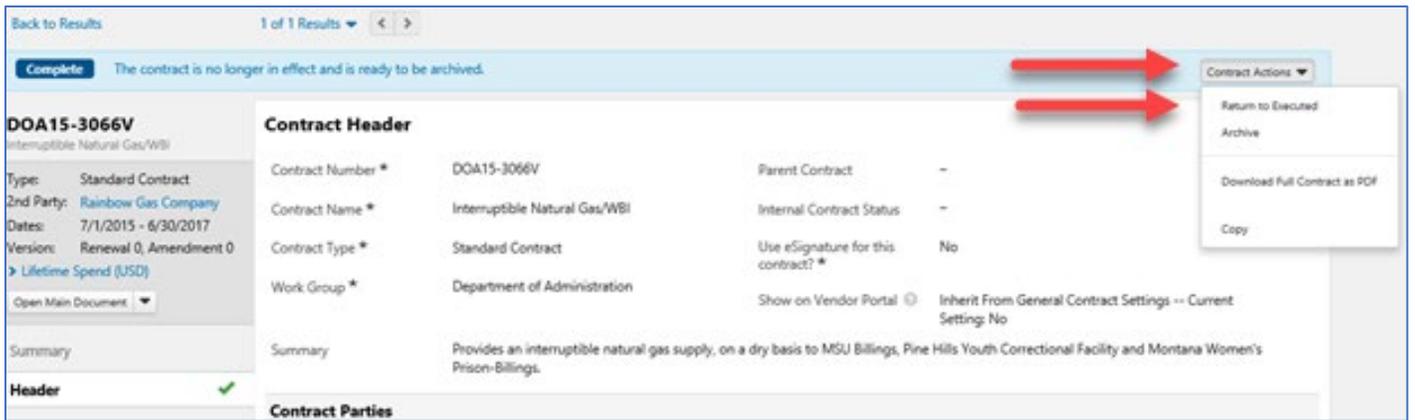
**Contract Header**

Contract Number \* DOA15-3066V  
Contract Name \* Interruptible Natural Gas/WBI  
Contract Type \* Standard Contract  
Work Group \* Department of Administration

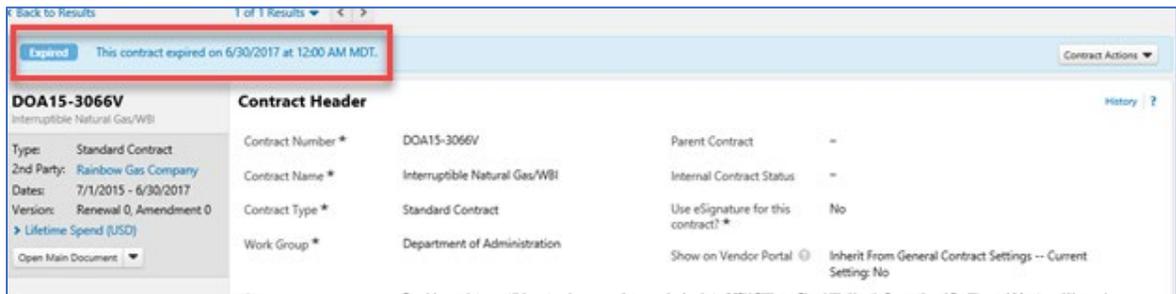
Parent Contract -  
Internal Contract Status -  
Use eSignature for this contract? \* No  
Show on Vendor Portal  Inherit From General Contract Settings -- Current Setting: No

Summary: Provides an interruptible natural gas supply, on a dry basis to MSU Billings, Pine Hills Youth Correctional Facility and Montana Women's Prison-Billings.

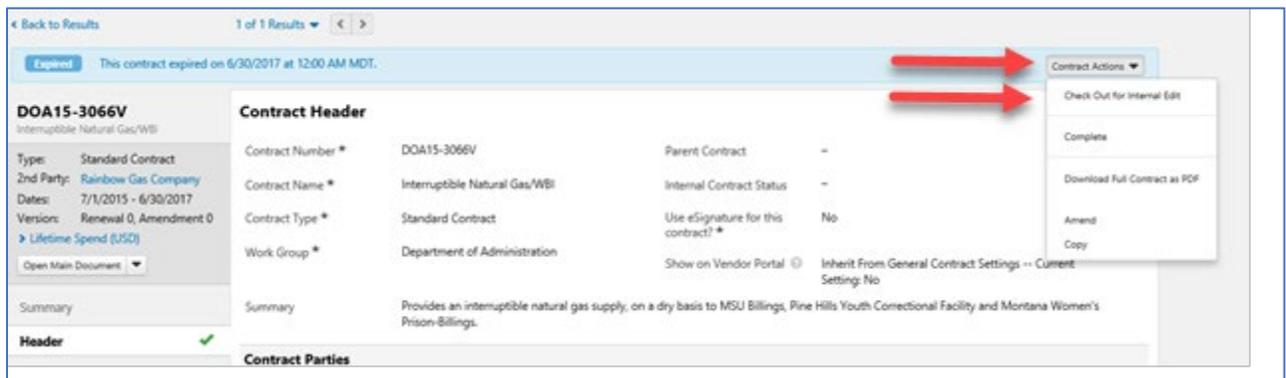
3. Once the completed Closeout form has been received from the agency, the Contracts Officer will return to the contract in TCM and update the contract's status and attach the closeout form.
4. Search for / open contract.
  - a. Select **Contract Actions**, select **Return to Executed**.



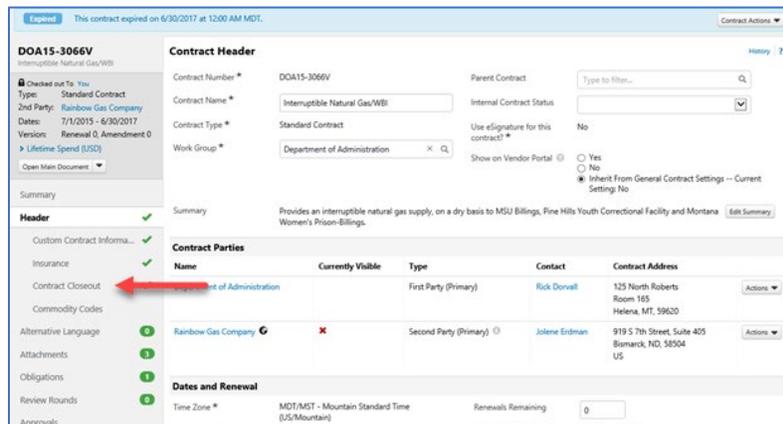
b. Contract status changes from *Complete* to *Expired*.



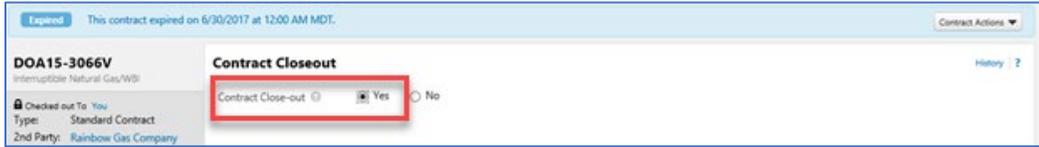
c. Select **Contract Actions**, select **Check Out for Internal Edit**.



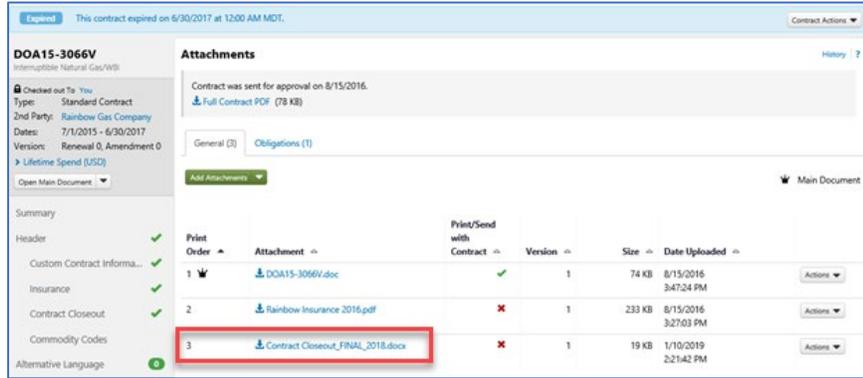
d. Select **Contract Closeout**.



- e. At the Contract Closeout page, check **Yes**.
- f. Select **Save Progress**.



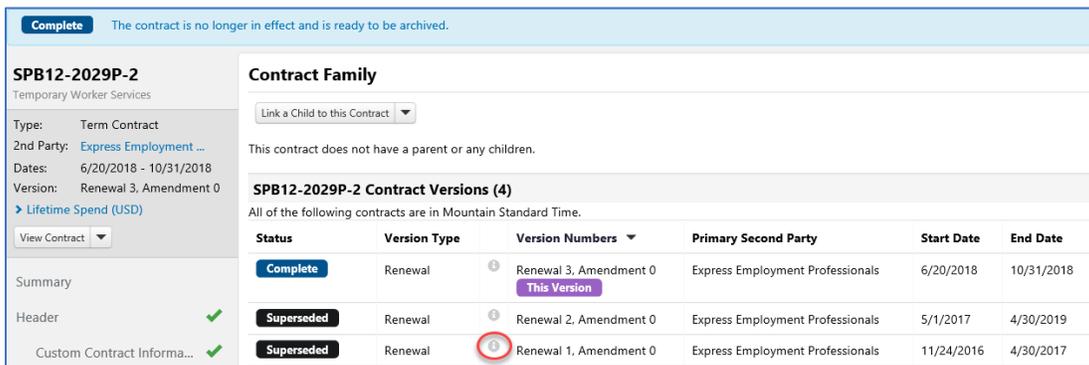
- g. Select **Attachments**.
- h. Attach the Closeout Form.



- 5. Once the Closeout form has been added, select **Contract Actions**, select **Check In**.



- 6. Select **Contract Actions** again, select **Complete**.
  - a. Select **Contract Family**. For each contract listed:
    - i. Select the gray text bubble.



- ii. Select **Go to Contract** at bottom right.

**Summary of Contract # SPB12-2029P-2**

[Open Main Document](#)

Header		Dates And Renewal	
Contract Name *	Temporary Worker Services	Start Date	11/24/2016 12:00 AM MDT
Contract Type	Term Contract	End Date	4/30/2017 11:59 PM MDT
Work Group *	State Procurement Bureau	Auto-Renew	✘
First Party *	State Procurement Bureau	Contract Managers	
Second Party *	Express Employment Professionals	Tia Snyder	TSnyder@mt.gov +1 406-444-3315
Internal Contract Status	-		
Summary	<a href="#">View Summary</a>		

Custom Contract Information  
 Insurance  
 Contract Closeout  
 Attachments

\* Required → [Go to Contract](#) [Close](#)

- iii. Select **Contract Actions** again, select **Archive**.
- iv. Follow this process until all listed contracts are archived.

**Complete** This contract is archived and can no longer be used. Contract Actions ▾

**SPB12-2029P-2**  
Temporary Worker Services

Type: Term Contract  
 2nd Party: [Express Employment ...](#)  
 Dates: 6/20/2018 - 10/31/2018  
 Version: Renewal 3, Amendment 0  
[Lifetime Spend \(USD\)](#)

[View Contract](#) ▾

Summary  
 Header ✓  
 Custom Contract Informa... ✓  
 Insurance ✓

**Contract Family** [View XML](#) | [History](#) | ?

[Link a Child to this Contract](#) ▾

This contract does not have a parent or any children.

**SPB12-2029P-2 Contract Versions (4)**

All of the following contracts are in Mountain Standard Time.

Status	Version Type	Version Numbers ▾	Primary Second Party	Start Date	End Date	Create Date ▲
Archived Contract	-	-	-	-	-	-
Archived Contract	-	-	-	-	-	-
Archived Contract	-	-	-	-	-	-
Archived Contract	-	-	-	-	-	-

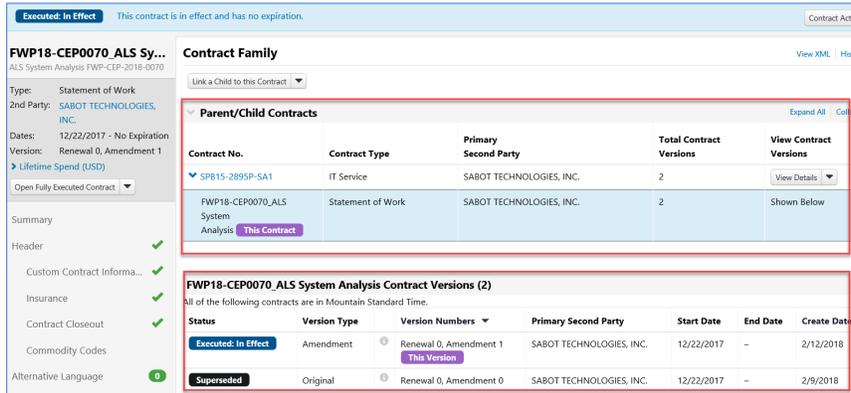
[Back to Appendix 2](#)

## Appendix 3 - Contract Family

The Contract Family screen displays a list of all contracts connected to the contract. Related contracts are grouped into two sections: Parent/Child Contracts - in the case of Master/Term Contracts the parent and child (task orders or PO issued under the parent) relationships, and Contract Versions – all amendments and renewals of the contract.



1. Select the info icon to open the Contract Summary.
2. From there open the contract by selecting **Go to Contract**.



The screenshot shows the 'Contract Family' interface for contract 'FWP18-CEP0070\_ALS System Analysis'. The interface includes a left-hand navigation menu with options like 'Summary', 'Header', 'Custom Contract Information', 'Insurance', 'Contract Closeout', 'Commodity Codes', and 'Alternative Language'. The main content area is divided into two sections: 'Parent/Child Contracts' and 'FWP18-CEP0070\_ALS System Analysis Contract Versions (2)'. The 'Parent/Child Contracts' section contains a table with columns for Contract No., Contract Type, Primary Second Party, Total Contract Versions, and View Contract Versions. The 'Contract Versions' section contains a table with columns for Status, Version Type, Version Numbers, Primary Second Party, Start Date, End Date, and Create Date.

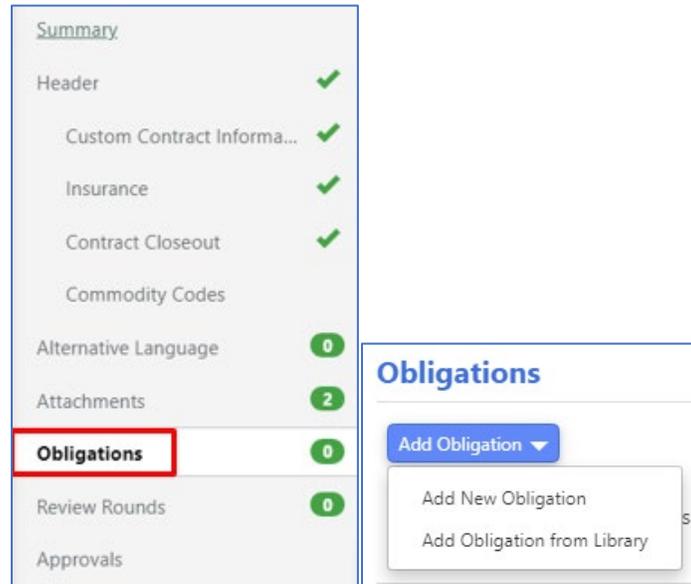
Contract No.	Contract Type	Primary Second Party	Total Contract Versions	View Contract Versions
FWP18-CEP0070_ALS System Analysis	Statement of Work	SABOT TECHNOLOGIES, INC.	2	Shown Below

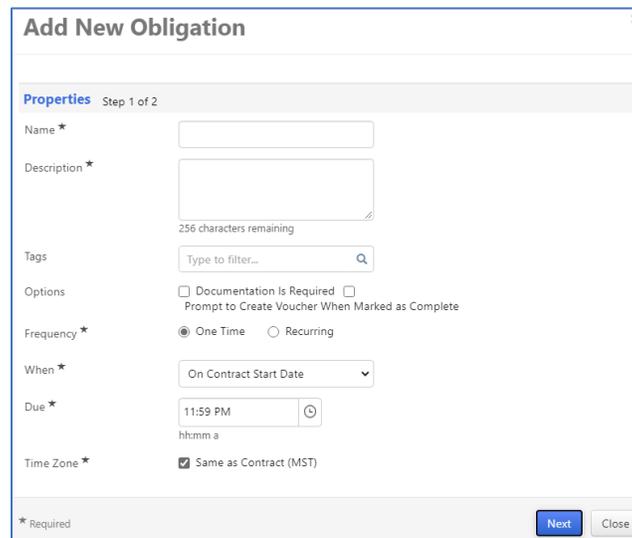
Status	Version Type	Version Numbers	Primary Second Party	Start Date	End Date	Create Date
Executed: In Effect	Amendment	Renewal 0, Amendment 1 This Version	SABOT TECHNOLOGIES, INC.	12/22/2017	-	2/12/2018
Superseded	Original	Renewal 0, Amendment 0	SABOT TECHNOLOGIES, INC.	12/22/2017	-	2/9/2018

## Appendix 4 – Obligations (optional)

This is an optional section of eMACS called Obligations. Here you can set up a reminder email to automatically go out to you, the Contract Manager, and the vendor. SPB does not use this feature, but there are a few agencies that do utilize this for insurance and other reminders.



1. Select Obligations menu tab, then select **Add New Obligation** and a new window will pop up.
2. Enter all the required information on the **Add New Obligation** window.



3. In the next window you will need to enter *Owners and Stakeholders* that you want to receive the notification.
4. Select the **Add New** button to add the contacts.
5. Add the time period in which you would like to have Advance notices sent. You can choose to only have it sent 30 days prior or you can do one at 30 days, one at 60 days, etc.

6. The next screen will now show the new Obligation that you created.

Obligation Name	Obligation Id	Status	Due Date	Complete Date	First Party Owner
Insurance Reminder	123609	Upcoming	3/23/2020 11:59 PM MDT		Justin Harris

7. When you select the **Actions** menu you can edit the Obligation by the following: *Properties, Owners and Stakeholders, Mark as Complete, Cancel Obligation.*

Obligation Name	Obligation Id	Status	Due Date	Complete Date	First Party Owner	Actions
Insurance Reminder	123609	Upcoming	3/23/2020 11:59 PM MDT		Justin Harris	<ul style="list-style-type: none"> <li>Properties</li> <li>Owners and Stakeholders</li> <li>Mark as Complete</li> <li>Cancel Obligation</li> </ul>

8. In the example of Insurance, if there is an attachment that is required (when you set up the Obligation), when it is uploaded it will show here under the Obligation tab.

[Back to Appendix 4](#)

[Back to Table of Contents](#)

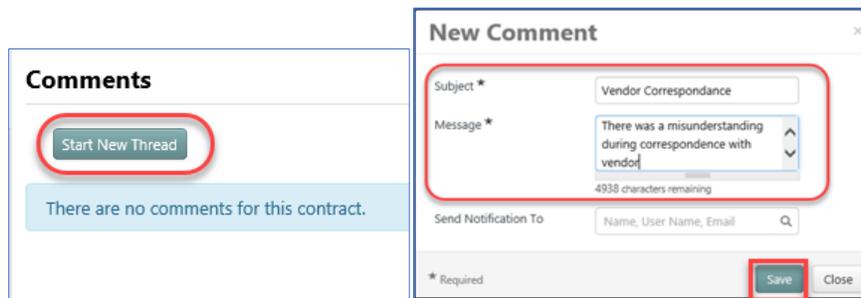
## Appendix 5 - COMMENTS

---

Comments is optional for ALL contracts.

This section is used to record important comments about the contract and/or contractor such as performance, negotiation, and communication.

1. To enter a comment:
  - a. Select **Start New Thread**.
  - b. Enter an appropriate **Subject** for the new comment.
  - c. Enter comment **Message**.
  - d. Select name(s) to **Send Notification To** (not required)
  - e. Select **Save**.



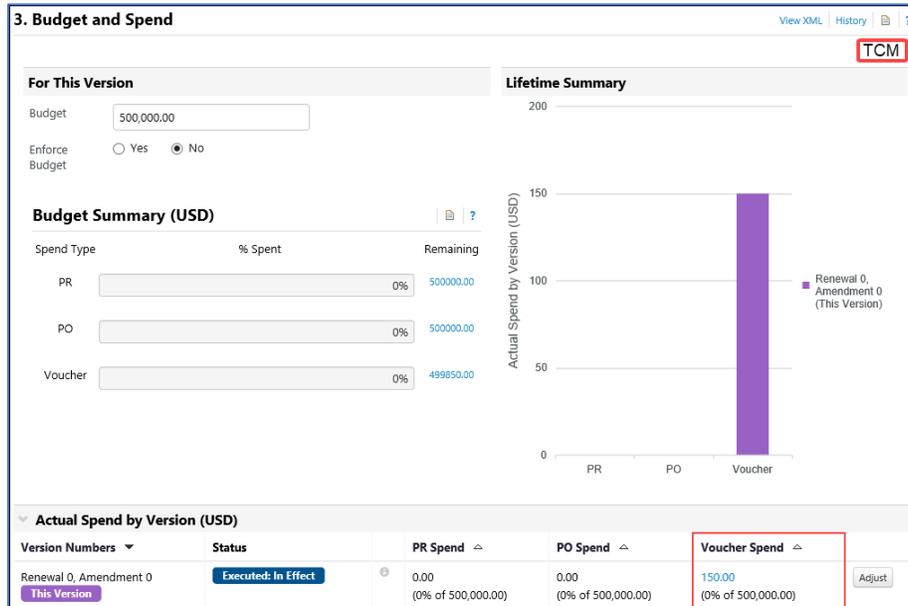
The image shows two screenshots from a software interface. The left screenshot shows a 'Comments' section with a 'Start New Thread' button circled in red. Below the button is a message: 'There are no comments for this contract.' The right screenshot shows a 'New Comment' dialog box. The 'Subject' field contains 'Vendor Correspondance' and the 'Message' field contains 'There was a misunderstanding during correspondence with vendor'. The 'Send Notification To' field is empty. The 'Save' button is circled in red. A red box highlights the 'Subject' and 'Message' fields.

2. Selected users will receive an email notification of new comments with a link inside email to comment area in TCM to view and reply to comment.

# Appendix 6 - Contract Integration Between SABHRS And TCM To Track Contract Spend

eMACS TCM integrates with the State Accounting, Budgeting, and Human Resource System (SABHRS) providing the ability to track contract spend. The functionality is available for agencies that make payments directly in SABHRS Accounts Payable (AP). The AP person will select the applicable contract when making a payment in SABHRS AP.

A process will run during SABHRS nightly batch processing that identifies TCM Contract Payments. This will feed to TCM and update the **Voucher Spend** in the **Budget and Spend** area of TCM.



Selecting the **History** link in **Budget and Spend** will provide the specific payment details. This will include payments in all statuses including *Paid, Offset, Cancelled, and Reissued*.

**3. Budget and Spend** View XML | History | ? TCM

<https://userestest.sciquest.com/> Export CSV

[Filter History](#)

Date	User	Step (s)	Action	Section	Sub Section	Field	Old Value	New Value	Note
5/7/2018 2:56 PM	System	-	Manual Spend Adjustment (via import)	3. Budget and Spend	Actual Spend by Version	Vouchers	300.00	150.00	Modified
5/7/2018 11:50 AM	System	-	Manual Spend Adjustment (via import)	3. Budget and Spend	Actual Spend by Version	Vouchers	150.00	300.00	Modified
5/3/2018 11:19 AM	System	-	Manual Spend Adjustment (via import)	3. Budget and Spend	Actual Spend by Version	Vouchers	0.00	150.00	Modified

SABHRS updates can be identified by the User listed as System. TCM displays the old value and the new value after the update. Specific payment or adjustment amounts can be calculated by subtracting these values.

## Section 6.1 Manual Payment Adjustments

Users can make manual payment adjustments in their contracts. Manual payment adjustments could be made when a payment made in SABHRS is not applied to the contract or when overpayment has occurred.

1. In the **Budget and Spend** section of the contract:
  - a. Select **Adjust**.

Version Numbers	Status	PR Spend	PO Spend	Voucher Spend	
Renewal 0, Amendment 0 <b>This Version</b>	Executed: In Effect	2.00 (0% of 0.00)	0.00 (0% of 0.00)	0.00 (0% of 0.00)	Adjust

2. In the **Adjust Actual Spend** window:
  - a. **Adjustment Type**: select Vouchers. SABHRS updates the Voucher section only.
  - b. **Amount (+/-)**: enter amount of adjustment. Using the + sign will result in a "Value is invalid" error message.

**Note:** Enter reason for adjustment. This information is included in the contract's history.

Date	User	Step(s)	Action	Section	Sub Section	Field	Old Value	New Value	Note
3/22/2019 1:30 PM	Bonny(Admin) McCabe	-	Manual Spend Adjustment	3. Budget and Spend	Actual Spend by Version	Vouchers	3.00	1.00	Removing \$2
3/22/2019 1:29 PM	Bonny(Admin) McCabe	-	Manual Spend Adjustment	3. Budget and Spend	Actual Spend by Version	Vouchers	0.00	3.00	Adding \$3
3/22/2019 1:28 PM	Bonny(Admin) McCabe	-	Manual Spend Adjustment	3. Budget and Spend	Actual Spend by Version	Requisitions	998.00	2.00	-
3/22/2019 1:27 PM	Bonny(Admin) McCabe	-	Manual Spend Adjustment	3. Budget and Spend	Actual Spend by Version	Requisitions	2.00	998.00	-
3/22/2019 8:29 AM	(admin)Tom Hastings	-	Manual Spend Adjustment	3. Budget and Spend	Actual Spend by Version	Vouchers	100.00	0.00	note

[Back to Appendix 6](#)

## Appendix 7 - Novation/Vendor Name Change

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Contractors who have been awarded contracts will sell their company to another contractor or change their company name. When this occurs, the Contracts Officer will complete a Novation agreement/contract amendment when there is a change in ownership of a company that includes a change to the Federal Tax Identification number.

The Contracts Officer will also prepare a Novation\_Contract\_Agreement\_Amendment\_Form to be signed by both contract parties. The new contractor must be registered in the **eMACS Total Supplier Manager** module as a Profile 2 vendor. When the Contracts Officer amends the contract, the new contractor will be selected as the **Second Party (Primary)**. When a contractor changes its company name only, the Contracts Officer will have the contractor update the company name in the **eMACS Total Supplier Manager** module. Then, when the Contracts Officer prepares an amendment identifying the name change the contract, the contractor's new company name will be visible.

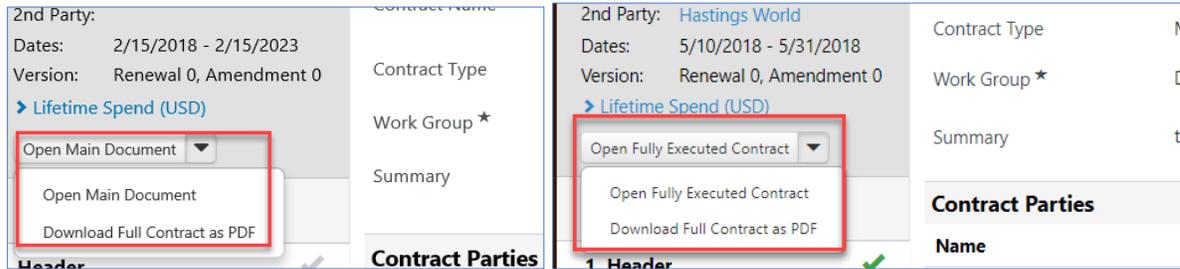
Novations/vendor name changes are done following the procedures for amendments or renewals.

## Appendix 8 - Printing Contracts from eMACS

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Open or download a PDF version of the contract that should include the contract and any attachments to the contract that have **Print with Full Contract** selected. This action is not available if no attachments are associated with the contract.

1. Search for / open contract.
  - a. On the left side menu, select **Open Main Document** or **Open Fully Executed Contract**.
  - b. Select **Download Full Contract as PDF**. A processing download window opens.
  - c. Select file name to download / open the contract.
  - d. Print contract.



## Appendix 9 – External Review Round (Optional)

External Review Rounds can be set up prior to sending out the contract for signature via eMACS TCM.

This is the time where if you want to do the review within the system you can route the contract to people. The one disadvantage is that when someone edits the document, that new one needs to be uploaded for the next person.

If this is something you do not want to use, you can skip and do this outside the system. Once you have the final contract ready for signature you can upload that version and send it through DocuSign.

To set up the Review Rounds go to the tab to bring up the window.

Summary	
Header	✓
Custom Contract Informa...	✓
Insurance	✓
Contract Closeout	✓
Commodity Codes	
Alternative Language	0
Attachments	0
Obligations	0
<b>Review Rounds</b>	0
Submit for Approval	

1. Select the **Start External Round**.

### Review Rounds

This contract has 0 completed rounds of review.

[Create Manual Internal Round](#) [Start External Round](#)

2. Select the option **Add Reviewer**.

### Review Rounds

This contract has 0 completed rounds of review.

▼ **Next Round (External)**

[Add Reviewer](#) [Delete Round](#)

3. Enter the required information for the person whom you want to review the document.

**Add Reviewer**

First Name \*

Last Name \*

Email \*

Title

Phone Number  ext.

International phone numbers must begin with +

\* Required **Save** Close

4. Select **Save**, then the reviewer will show. Then, select **Begin Round**.

**Review Rounds** History ?

This contract has 0 completed rounds of review. Expand All Collapse All

▼ **Next Round (External)**

**Add Reviewer** **Begin Round**

Status	Reviewer	Email	Title	Phone Number	Actions
Not Sent	Harris, Justin	justin.harris@mt.gov	-	-	Edit Properties

5. Once the round has begun a new window will appear. At this stage most of the information will have been auto filled, if there is a specific attachment you can add it here.

**Begin Round of External Review**

Email one or more external reviewers to start the round.

Maximum message size limit is 10000 KB.

**Recipients**

Recipients \*  Justin Harris

**Attachments**

Indicate which attachments you would like to include in the email.

*No attachments have been added.*

**Email Content**

Customize your email below: Users must change the from email address to StateofMontana@jaggaer.com

From Name \*

From Email (StateofMontana@jaggaer.com should be used) \*

Reply To Email \*

Subject \*

Right click on placeholders to edit or remove them.

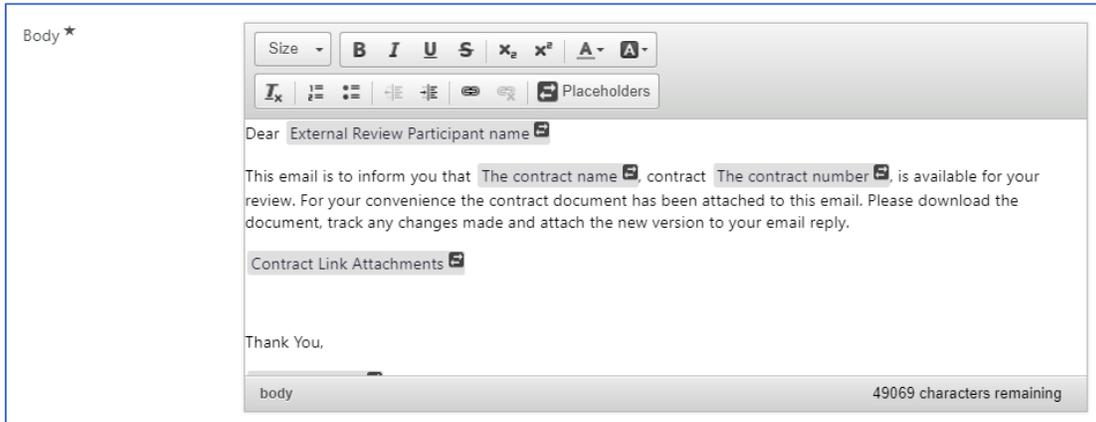
Body \*

\* Required **Send Email** Close

[Back to Appendix 9](#)

[Back to Table of Contents](#)

6. In the **Body**, placeholders have already been set and will auto-fill after you select **Send Email**.



Add Attachments Main Document

Print Order	Attachment	Print/Send with Contract	Show on Vendor Portal	Version	Size	Date Uploaded	Actions
1	Main Contract TEST_DOCUMENT.docx	✗	✗	1	11 KB	3/4/2019 12:37:14 PM	Actions
2	Amendment Versions AMD_4_DOA2020-0001.docx	✓	✗	4	18 KB	7/26/2019 7:42:42 AM	Actions
3	Insurance Ins_GL AL WC 3.1.20.PDF	✓	✗	2	43 KB	6/27/2019 2:14:49 PM	Actions
4	Renewals Test Document for 19.3.docx	✓	✗	1	11 KB	10/29/2019 9:41:39 AM	Actions
5	eMACS Test eMACS Test Links and Passwords.pdf	✗	✗	1	321 KB	10/29/2019 1:10:31 PM	Actions

The 'Actions' dropdown for the fifth row is expanded, showing options: Edit Properties, Download, Upload New Version (highlighted with a red box and arrow), Version History, Replace as Main Document, and Delete.

1. **Accessing the version history**

- a. Select the **Actions** dropdown.
- b. Select **Version History**.

### Version History

Version History for New Letterhead 2019.docx

Version	Attachment File	Size	Date Uploaded	Changed By	Comments	Compare
2 (Latest)	New Letterhead 2019.docx Training Courses_NIGP.docx	37 KB	2/11/2020	(Admin)Lisa Hartman	-	Select
1	New Letterhead 2019.docx	85 KB	2/11/2020	(Admin)Lisa Hartman	-	Select

**Compare Section**

↑↓

Include Format Changes  Yes  No Compare

Close

[Back to Appendix 9](#)