



SCPro – Reviewing and Managing Contracts

Source to Contract (S2C)



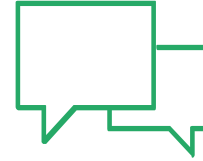
Duration: **30 Mins**



House Rules



Find a quiet place to focus on the course



Be respectful of other participants



Actively listen, engage, and ask questions



Let the facilitator know if you need help



When not speaking, mute your microphone

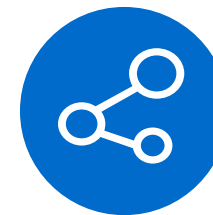
SCPro Benefits



Allows users to
focus on activities
specific to their role
on the team



Streamline the
search for information
and provide clarity on
action items



Facilitate
collaboration
among supplier
teams and with the
State.



Course Prerequisites

- Registering and Managing SCPro Supplier Accounts



Target Audience

- Supplier Admin
- Supplier Contract Contact

Course Learning Objectives



The **SCPro Reviewing and Managing Contracts** course provides a deep dive into how to locate, review, and act on contracts within SCPro.

After completing this course, you will be able to:

1. Find pending and active contracts in SCPro.
2. Redline contracts using different forms of document authoring.
3. Manage contract information including documents, dealers/resellers, and subcontractors.



Course Agenda



Course Agenda

Course Introduction and Objectives

Lesson 1: Overview

Lesson 2: Reviewing and Editing Contract Documents

Lesson 3: Managing Contracts

Course Conclusion



Key Terms



The following Key Terms will be referenced in this course:

Term	Description
Contract Record	The contract record differs from the legal agreement. The record contains multiple pieces of information about the contract such as general info, documents, items, dealers/resellers, and subcontractors.
Contract Document	A supplemental document or attachment that exists within the contract record. This also includes the legal agreement.
Native Authoring	A type of authoring that allows a user to edit a legal agreement directly in SCPro.
MS Word Authoring	A type of authoring that allows a user to edit a legal agreement within the Microsoft Word program and have that document stored in SCPro.
Sourcing Project	Similar to a folder, the project contains all information about the current need, the team managing the RFx, invited Suppliers, and relevant documents. The project also houses information about the bid opportunity (e.g. Request for Proposal, Quick Quote) that is visible to Bidders.

Key Changes



These key changes will be discussed throughout this training:



SCPro manages the full contract lifecycle including creation, contract review, and signature. It allows users to easily see the relationship between sourcing events, contracts, and procure-to-pay documents such as orders.



The document review and contract negotiation process allows all parties to draft and redline legal agreements directly in SCPro to create a collaborative experience and managing versioning.



Suppliers can manage their own contract data by editing information directly in SCPro using contract change requests.



Lesson 1

Contracts Module Overview

- ✓ Sourcing Events and Contracts
- ✓ Contract Records and Tabs
- ✓ Locating Existing Contracts
- ✓ Public Contracts
- ✓ Demonstration 1: Searching for a Public Contract

Awards and Contracts



After a sourcing project is completed, new contracts can be created. If your bid is selected, the State will issue a Statement of Award or Intent to Award.

Before being fully awarded a contract, bidders will have to complete the full registration process.

Tabs on the Contract Record



1. General Info

This tab can be considered a cover page that lists general information such as contract name, applicable organization, commodities covered, and key contract dates.

2. Hierarchy (Extranet)

This tab shows all related contracts such as amendments and parent/child contracts.



3. Documents (Extranet)

This tab shows any contract documents as well as any additional documents that pertain to the contract.

4. Items

This tab shows all items and services related to the contract. This is the foundation of what information goes into the hosted catalog.



Tabs on the Contract Record

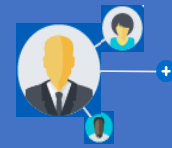


5. Dealers/Resellers (Extranet)

This tab displays all sub-tier suppliers that will provide the items listed on the **Price List** tab.

6. Subcontractors (Extranet)

This tab will display any subcontractor information, if applicable.



7. Change Request (Extranet)

This tab allows users to submit new and monitor existing requests to change contract information.

8. Revenue Share (Extranet)

This tab shows the ability to track and record revenue share payments (Available for Statewide Term and Revenue Generating Contracts only)

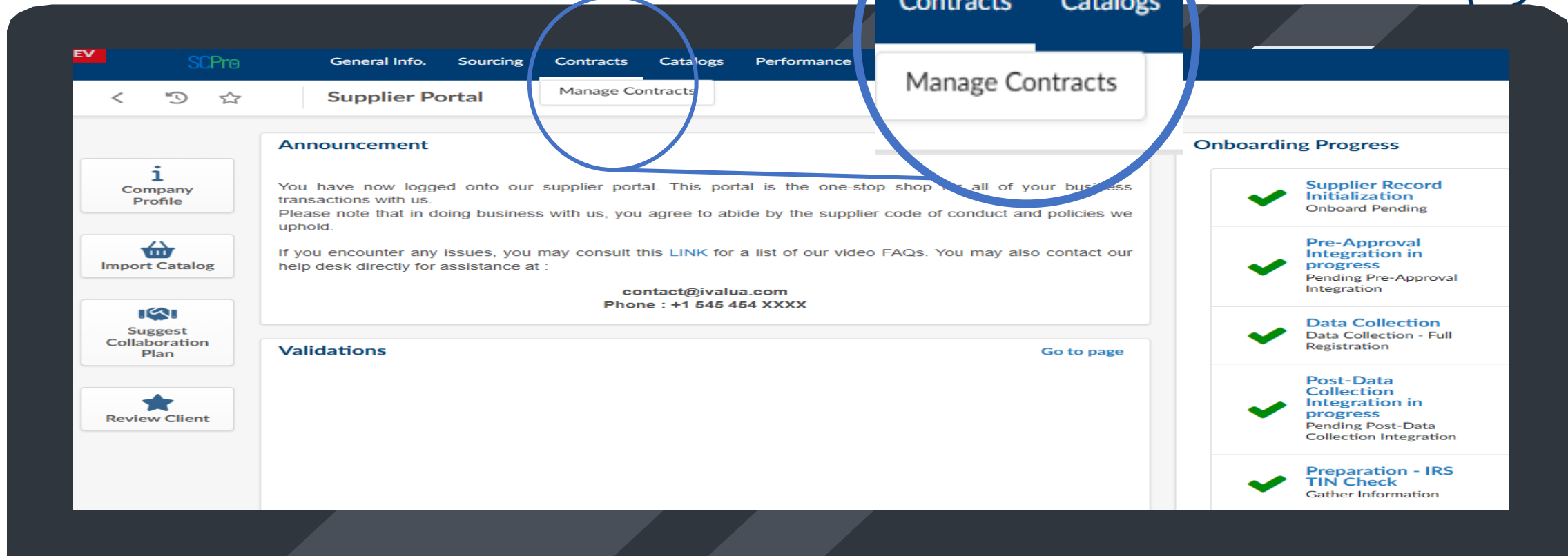


9. Admin Fee/ Co-Op Usage (Extranet)

This tab shows all admin and co-op usage fees associated with the contract.



Locating Contracts



Contracts are located under the Contracts menu at the top of the page after logging in on the Manage Contracts page.

Public Contracts



Public contracts are visible to individuals that do not have login information for SCPro. The information they can see will be limited to:

- **General Information Header:** Contains important details related to the contract such as contract name, supplier, contract owner, contract type, and amount.
- **Contract Scope:** Organizations and commodities within the State that are covered by the contract.
- **Contract Validity:** Start and end date for the contract.
- **Documents:** Supplemental documents and attachments that are intentionally marked for public view.
- **Items:** All items and services covered by the contract.

Demonstration 1



Searching for a Public Contract in SCPro



We will now demonstrate how to search for a public contract in SCPro.



Lesson 2

Reviewing Contract Documents

- ✓ Document Types
- ✓ Signing a Contract

Bid-related Documents



Occasionally, the State will include the contract document and other supporting, or supplemental, documentation that can be viewed with the bid details.

Bidders will not have the opportunity to redline the contract documents collaboratively with the State but they can submit questions during the bidding period.

Types of Contract Documents



Document Type	Visible on Public Portal	Visible on Buyer Portal to all Internal Users	Visible to the Contracted Supplier
Main Contract (authoring)	✓	✓	✓
Main Attachments (attachments)	✓	✓	✓
Other Documents (attachments)		✓	✓

Types of Contract Documents Cont'd



Document Type	Visible on Public Portal	Visible to all Internal Users	Visible to the Supplier
Change Order Offline Signatures (authoring)	✓	✓	✓
Change Order/Contract Modifications (attachment)	✓	✓	✓
Confidential/Unredacted Documents		✓	✓
Contractor Performance (attachment)		✓	✓
Final Redacted Contract Documents (attachment)		✓	✓

Types of Contract Documents Cont'd



Document Type	Visible on Public Portal	Visible to all Internal Users	Visible to the Supplier
Internal Documents (Not Confidential) (attachment)		✓	
Legacy Documents Internal (attachment)		✓	
Legacy Documents Public (attachment)	✓	✓	✓
Public Documents (attachment)	✓	✓	✓
Solicitation and Amendments (attachment)	✓	✓	✓

Signing a Solicitation Document



It may be required for bidders to sign and submit a copy of the cover page/page 2 with a signature with a signature to acknowledge their acceptance of the terms and conditions.

When your bid is selected, the State will either issue an Intent to Award or a Statement of Award. Both documents are intended to represent a "signature" from the State of South Carolina.

No additional signatures are required to approve the contract in SCPro.



Lesson 3

Managing Contracts

- ✓ Contracts and Catalogs
- ✓ Dealers/Resellers and Subcontractors
- ✓ Demonstration 4: Adding a Dealer/Reseller or Subcontractor
- ✓ Amendments
- ✓ Change Requests
- ✓ Demonstration 5: Submitting a Contract Change Request

Catalog Items

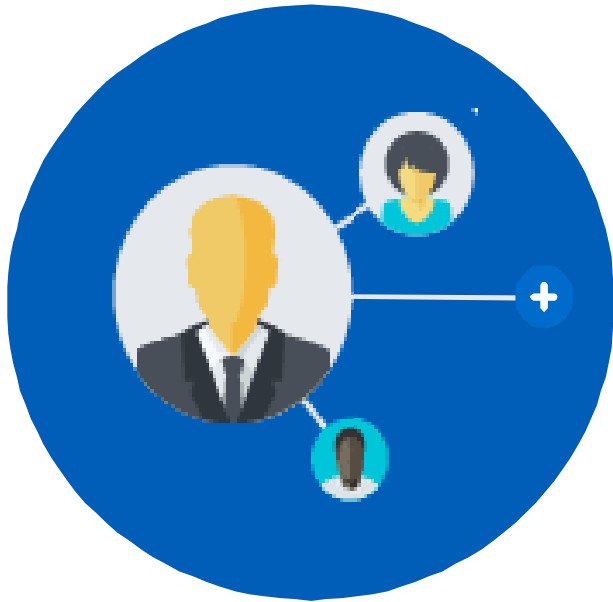


If the State contract owner creates a contract record from the bid, the items can be copied into the contract into the **Item** tab.

This information will typically be updated and approved for publishing during the hosted catalog import process. This import process can take place simultaneously with the contract approval workflow.

In both scenarios, the items **will not** be available for order until the contract is in an “active” status and the validity date has occurred.

Dealers/Resellers and Subcontractors



Dealer/reseller information can be housed on the contract record in SCPro. Suppliers can manage existing information and add new entries. Each dealer/reseller will be required to have a supplier number and undergo a review/approval process before becoming active. Please note not all contracts have a dealer(s)/reseller(s).

Subcontractor information is managed on a separate tab within the contract record. This information is also managed by suppliers.

Demonstration 2



Adding a Dealer/Reseller or Subcontractor in SCPro



We will now demonstrate how to add a dealer/reseller in SCPro.

Contract Amendments



Contracts can be amended by State personnel to make important changes to the record or to extend the life of an existing agreement. When amending a contract, there are a few key considerations to keep in mind:

- Amending a contract will create a new contract record that retains some, but not all, information and documents from the original contract.
- The new record will have its own unique contract number which will be the original with an appended amendment number. Example: CTR4400000087-01.
- Both the original contract and any amendments will be connected via the contract hierarchy.
- Catalog items will be copied over (that are not in blocked status). The original items will expire according to the dates of the original contract. This may require another review of existing catalogs after the agreement is signed.

Contract Change Requests



If you need to update a contract after it has been signed, a change request must be submitted. When submitting a change request, you should:

- List the reason for the request.
- Provide a thorough description of what needs to be changed.
- Read comments from the contract owner and provide comments of your own.
- Monitor the approval workflow.

Demonstration 3



Submitting a contract change request in SCPro



We will now demonstrate how to submit a change request for a contract in SCPro.



Course Conclusion

Key Takeaways



Now that you are familiar with the process of reviewing and managing contracts in SCPro, take a moment to note the following key takeaways:

1

Overview

The entire contract lifecycle can be monitored and managed in SCPro allowing authorized users to organize contract information, create contract documents, and manage contract data.

2

Redlining Contracts

SCPro provides multiple methods for redlining a contract. Both Native and MS Word Authoring allow users to make edits directly to the document and make comments while tracking changes.

3

Managing Contracts

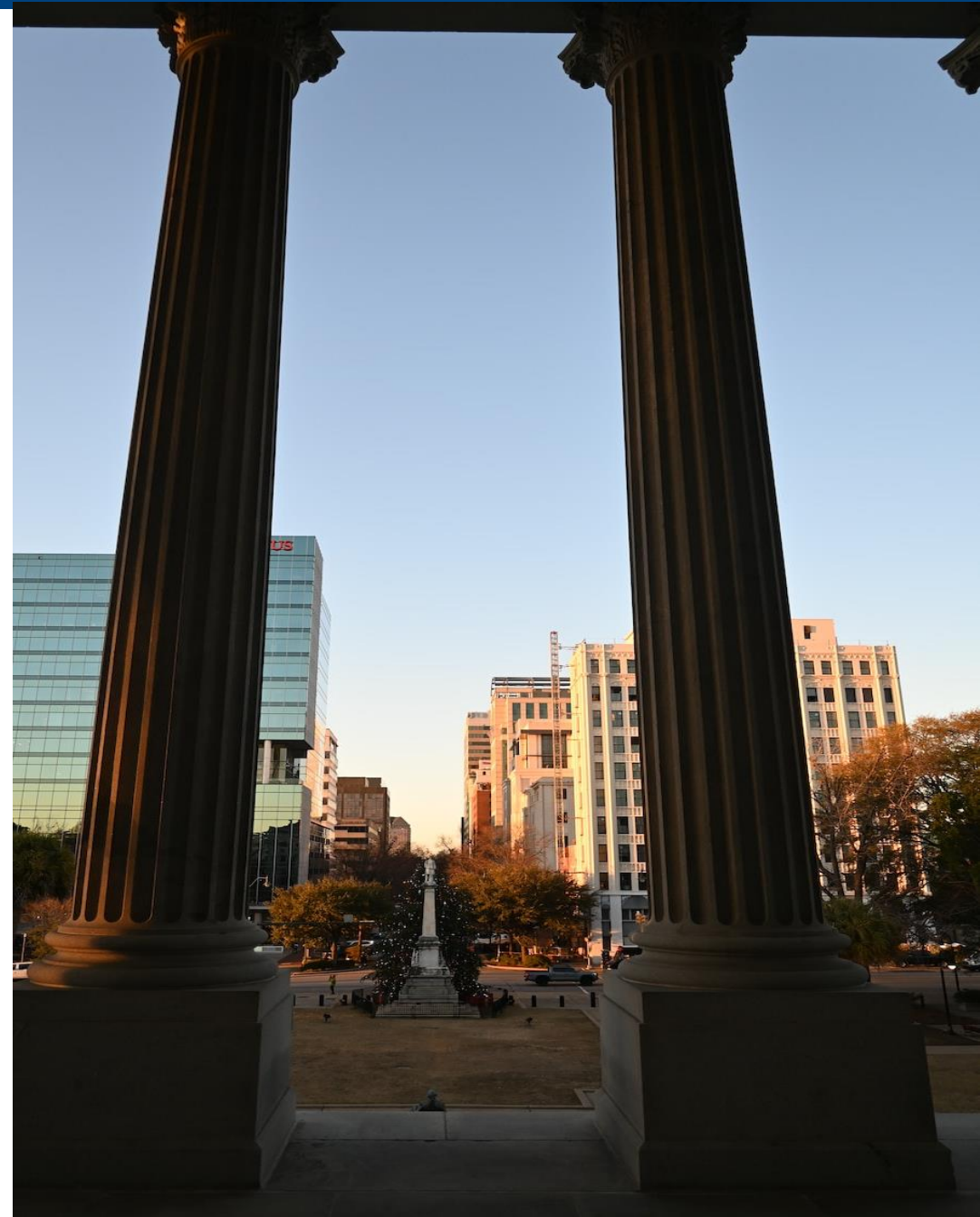
Contract change requests allow suppliers to request updates to contract and State users to review and approve proposed changes prior to the changes being confirmed in the system.

Course Summary



You should now be able to:

1. Find pending and active contracts in SCPro.
2. Redline contracts using different forms of document authoring.
3. Manage contract information including documents, dealers/resellers, and subcontractors.





CONGRATULATIONS

You have successfully completed the **Reviewing and Managing Contracts** course.