



# Ramsey County Supplier Portal Instructions

## Supplier Contract Management (SCM) System

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### Approving Contract Document

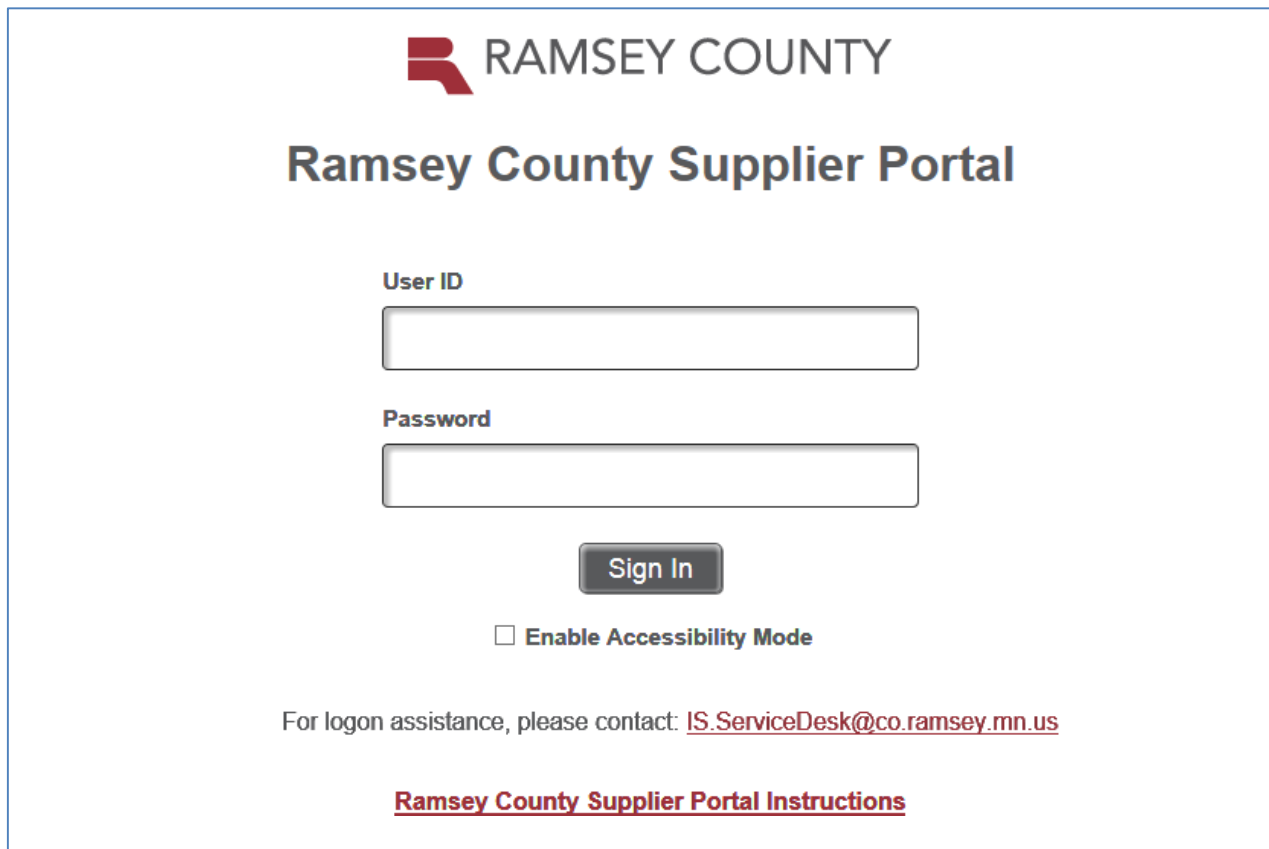
Ramsey County Professional Services Agreements (“PSA”) and Client Services Agreements (“CSA”) are electronically approved by both the Contractor and the appropriate Ramsey County staff. The Ramsey County Supplier Portal allows Contractors to log into the Ramsey County Supplier Contract Management System (“SCM”) and electronically approve their contract.

If you have been selected to enter into a Professional or Client Services Agreement, you will receive a Notice of Intent to Award letter which includes the “Ramsey County Supplier Portal Contractor Registration Security Form”. The Contractor needs to complete the form, print it, sign it, then scan it and email it to the Ramsey County Contact or mail it to the Ramsey County Contact. The Contractor shall authorize **no more** than two individual(s) who are authorized to electronically approve the contract.

Upon receipt of the Contractor Registration Security form, Ramsey County will set up a User Id and Password and email them to the authorized Contractor representatives or “Supplier Signer”. When there is a PSA or CSA contract ready for electronic approval, the appropriate Supplier Signer will receive an email. There will be a link to the Ramsey County Supplier Portal in the email that you use to access the login page.

1. Click the **link** in the approval email.

The *Ramsey County Supplier Portal* login page appears.



RAMSEY COUNTY

## Ramsey County Supplier Portal

User ID

Password

Sign In

☐ Enable Accessibility Mode

For logon assistance, please contact: [IS.ServiceDesk@co.ramsey.mn.us](mailto:IS.ServiceDesk@co.ramsey.mn.us)

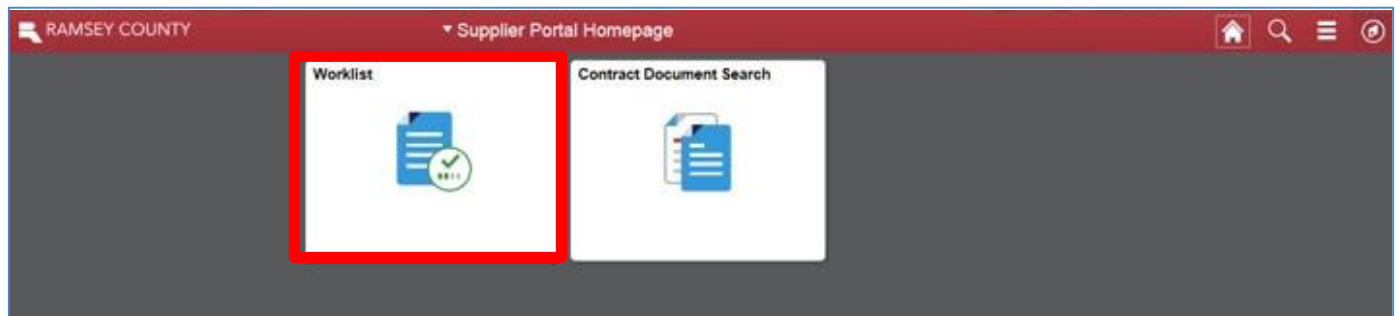
[Ramsey County Supplier Portal Instructions](#)

2. Enter your user id in the **User ID** field.
3. Enter your password in the **Password** field.

**Note:** Your **User ID** and **Password** should have been sent to you in a separate email with the subject: **Confirmation Email - Ramsey County Supplier Portal Log In Information**. If you do not have your **User ID** or **Password**, please email [IS.ServiceDesk@co.ramsey.mn.us](mailto:IS.ServiceDesk@co.ramsey.mn.us) to obtain your login credentials.

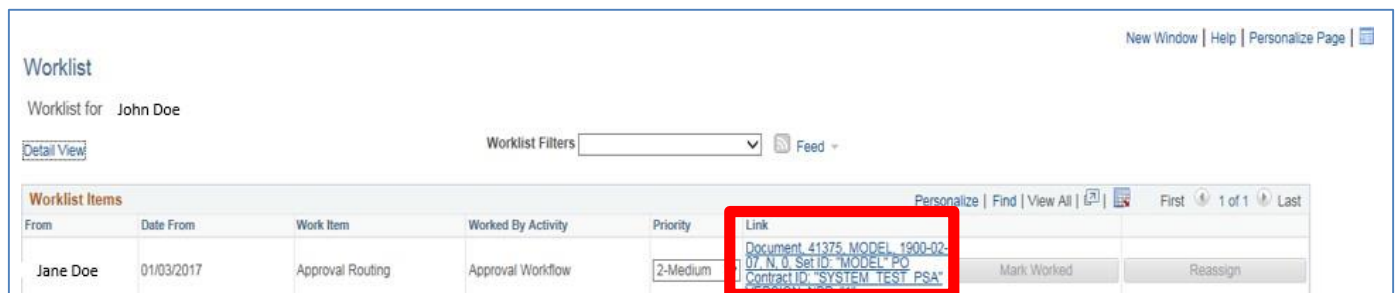
4. Click the **Sign In** button or press **Enter**.

The *Supplier Portal Homepage* displays.



5. To see the contract that requires your approval, click the **Worklist** tile on the left hand side of your screen.

The *Worklist* page displays with the document awaiting your approval listed in the Worklist grid.



6. To open the document, click the **document link** (i.e., Document, 41375, MODEL,...).

The *Document Management* page for the contract displays.

#### Document Management

**SetID** MODEL

**Supplier** ICEBERG TECHNOLOGY GROUP

**Contract Style** Procurement Contract

**Document Type** Professional Services Agrmnt

**Description** System Test - PSA

**Administrator** Kempe, Cheryl

**Sponsor**

**Contract ID** SYSTEM TEST - PSA

☒ **Checklist Completed**   **Completed Date:** 02/07/17 3:35PM   **Completed by:** ERIK.FERNSTROM

**Department**

**Version** 0.02  
**Status** Pending Approval

**Created On** 02/07/17 3:30PM  
**Last Modified On** 03/16/17 9:50AM

[Return to Document Search](#)

[Document Details](#)  
[Supporting Document/Checklists](#)  
[Original Contract/Amendment Information](#)

This document requires your approval. Review the document as directed, then select Approve or Deny.

Approve
Deny

**View and Edit Options:**

View Document

[Add/Modify Attachments/Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

**Review and Approval:**

**Other Document Actions:**

[Generation Log](#)

7. Please review the contract before you Approve it. To view the contract, click the **View Document** button.

The *File Download* window displays at the bottom of your screen.

**View and Edit Options:**

View Document

View Executive Summary

[Add/Modify Attachments/Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

**Review and Approval:**

**Other Document Actions:**

[Generation Log](#)

Do you want to open or save MODEL\_SYSTEM\_TEST\_PSA\_0.02\_(2)\_(1).xml from f9devsp.host.co.ramsey.mn.us?

Open

Save ▼


Cancel

×

8. Click the **Open** button.

The Document opens (read only) in word.

**Note:** If you are unable to open the document, please email [IS.ServiceDesk@co.ramsey.mn.us](mailto:IS.ServiceDesk@co.ramsey.mn.us) for assistance.



RAMSEY  
COUNTY

Contract ID: SYSTEM\_TEST\_PSA

**Professional Services Agreement**

This is an Agreement between Ramsey County, a political subdivision of the State of Minnesota, on behalf of the Finance Office, TST ("County") and ESF, TST, registered as a Corporation in the State of Minnesota ("Contractor").

**1. Term**

**1.1.**  
The term of this Agreement shall be from January 01, 2017 through December 31, 2017 and may not be renewed.

**2. Scope of Service**  
The County agrees to purchase, and the Contractor agrees to furnish, services described as follows:

**2.1.**  
The contractor shall provide services as follows:

A. General

Provide the full scope of financial advisory and consultant services related to meeting capital financing needs, HRA loan programs, financial market dealings, federal arbitrage, continuing disclosure and other specialized services as requested from an office in Minneapolis-St Paul metropolitan area.

**Note:** The contract document is an example contract for training purposes.

9. When you are finished viewing the document, click the **Close (X)** button in the upper right corner of the screen in Microsoft Word.

The *Supplier Portal Document Management* page displays again.

#### Document Management

**SetID** MODEL

**Supplier** ICEBERG TECHNOLOGY GROUP

**Contract Style** Procurement Contract

**Document Type** Professional Services Agrmnt

**Description** System Test - PSA

**Administrator** Kempe, Cheryl

**Contract ID** SYSTEM TEST - PSA

☒ **Checklist Completed**   **Completed Date:** 02/07/17 3:35PM   **Completed by:** ERIK.FERNSTROM

[Return to Document Search](#)

---

**Sponsor**

**Department**

---

**Version** 0.02

**Status** Pending Approval

**Created On** 02/07/17 3:30PM

**Last Modified On** 03/16/17 9:50AM

[Document Details](#)

[Supporting Document/Checklists](#)

[Original Contract/Amendment Information](#)

---

This document requires your approval. Review the document as directed, then select Approve or Deny.

Approve

Deny

---

**View and Edit Options:**

View Document

Add/Modify Attachments/Related Documents

[Document Modification Summary](#)

[Document Version History](#)

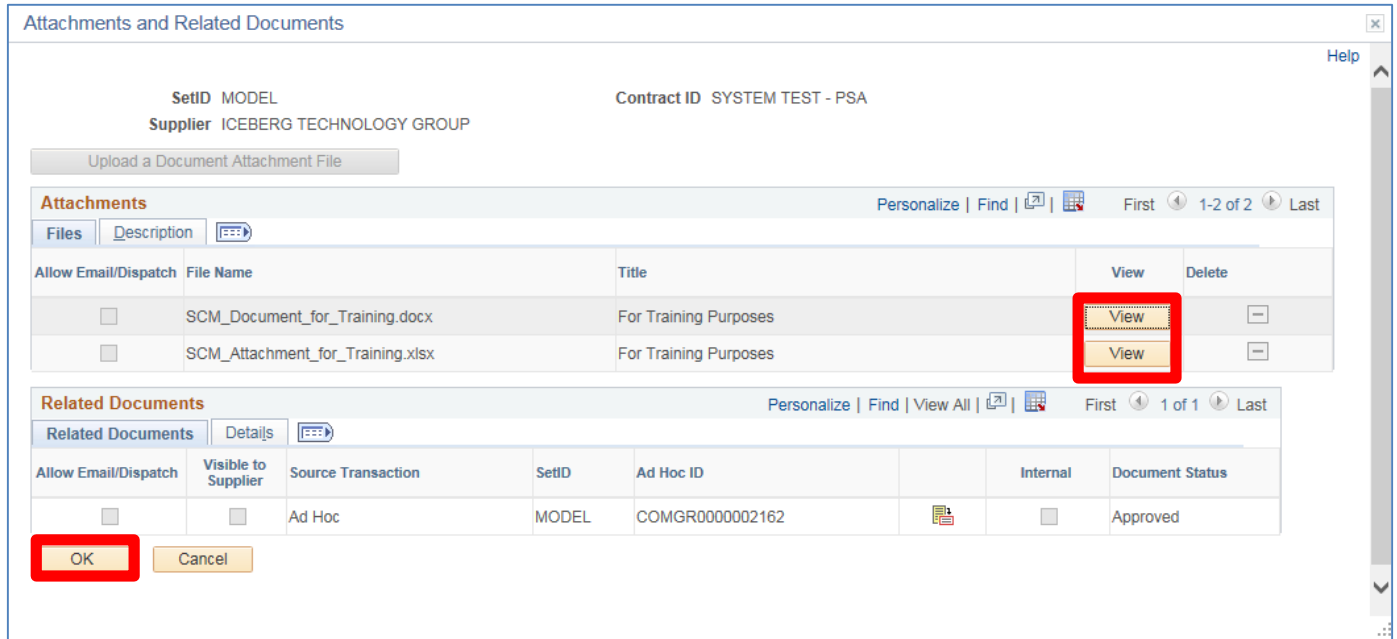
**Review and Approval:**

**Other Document Actions:**

[Generation Log](#)

10. Click the **Add/Modify Attachments/Related Documents** link to review any documents associated with the contract.

The *Attachments and Related Documents* window displays.



Attachments and Related Documents

SetID MODEL Contract ID SYSTEM TEST - PSA

Supplier ICEBERG TECHNOLOGY GROUP

Upload a Document Attachment File

**Attachments** Personalize | Find | 1-2 of 2 | First | Last

Files	Description	Title	View	Delete
<input type="checkbox"/>	SCM_Document_for_Training.docx	For Training Purposes	<b>View</b>	
<input type="checkbox"/>	SCM_Attachment_for_Training.xlsx	For Training Purposes	<b>View</b>	

**Related Documents** Personalize | Find | View All | 1 of 1 | First | Last

Related Documents	Details	Allow Email/Dispatch	Visible to Supplier	Source Transaction	SetID	Ad Hoc ID	Internal	Document Status
<input type="checkbox"/>	<input type="checkbox"/>	Ad Hoc	MODEL	COMGR0000002162		<input type="checkbox"/>	Approved	

**OK** Cancel

- Click the **View** button for each attachment that you would like to view. The document opens in the applicable application (Word, Excel, PDF, etc.).

**Note:** You are only able to view the related attachments, you cannot add, delete or change attachments. The information in the **Related Document** section is internal to Ramsey County and is read only.

- Click the **Close (X)** button in the upper right corner of the screen to close any opened attachments.
- When you are done reviewing the related documents, click the **OK** button to return to the Document Management page.

The *Supplier Portal Document Management* page displays again where you can either Approve or Deny the contract

#### Document Management

**SetID** MODEL

**Supplier** ICEBERG TECHNOLOGY GROUP

**Contract Style** Procurement Contract

**Document Type** Professional Services Agrmnt

**Description** System Test - PSA

**Administrator** Kempe, Cheryl

**Sponsor**

**Contract ID** SYSTEM TEST - PSA

[Return to Document Search](#)

☒ **Checklist Completed**   **Completed Date:** 02/07/17 3:35PM   **Completed by:** ERIK.FERNSTROM

**Department**

---

**Version** 0.02

**Status** Pending Approval

**Created On** 02/07/17 3:30PM

**Last Modified On** 03/16/17 9:50AM

[Document Details](#)

[Supporting Document/Checklists](#)

[Original Contract/Amendment Information](#)

---

This document requires your approval. Review the document as directed, then select Approve or Deny.

Approve

Deny

---

**View and Edit Options:**

View Document

[Add/Modify Attachments/Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

**Review and Approval:**

**Other Document Actions:**

[Generation Log](#)

14. If you want to approve the contract, click on the **Approve** button.



The *Document Approval Status* page appears. You still need to confirm your approval.

#### Document Approval Status

SetID MODEL  
Supplier ICEBERG TECHNOLOGY GROUP
Contract ID SYSTEM TEST - PSA

##### Approval Confirmation

This Document Will Be "Approved". Press "Approve" to Confirm or "Cancel" to return without approving.

Approve
Cancel

##### Review/Edit Approvers

#### Professional Service Agreement

▼ :Pending

PSA (Over \$100,000.00)

**Pending**

Multiple Approvers  
Supplier Signer

→

**Skipped**

No approvers found  
Department Approval Review

→

**Not Routed**

Multiple Approvers  
Dept Director Signer

→

**Not Routed**

Multiple Approvers  
FIN Analyst Approver

##### Comment History

##### Approval Alerts

-

##### Approval Comments

Approve
Cancel

[Return to Document Management](#)

**Note:** If your company has authorized two users to approve contract documents, the **Multiple Approvers** link in the Supplier Signer step is enabled. Click the link to view the two authorized users. Note that only one approver is required when the contract document is approved.

15. If you want to enter a comment regarding your approval, follow the steps below:

- a. Click in the **Approval Comments** field.

##### Approval Comments

- b. Type **your comment**.


**Note:** Your comment will be included in the approval process and available for the other approves to view.

### Document Approval Status

SetID MODEL  
Supplier ICEBERG TECHNOLOGY GROUP

Contract ID SYSTEM TEST - PSA

#### Approval Confirmation

 This Document Will Be "Approved". Press "Approve" to Confirm or "Cancel" to return without approving.

Approve

Cancel


#### Review/Edit Approvers

### Professional Service Agreement

:Pending


PSA (Over \$100,000.00)

#### Pending

 Multiple Approvers  
Supplier Signer


→

#### Skipped

 No approvers found  
Department Approval Review


→

#### Not Routed

 Multiple Approvers  
Dept Director Signer


→

#### Not Routed

 Multiple Approvers  
FIN Analyst Approver

#### Comment History

#### Approval Alerts



#### Approval Comments

Approve

Cancel

[Return to Document Management](#)

16. Click either one of the **Approve** buttons to confirm your electronic approval of the contract.

#### Document Approval Status

SetID MODEL  
Supplier ICEBERG TECHNOLOGY GROUP

Contract ID SYSTEM TEST - PSA

Review/Edit Approvers

#### Professional Service Agreement

:Pending

PSA (Over \$100,000.00)

Approved  
✓ Norling, Dan - Iceberg  
Supplier Signer  
03/16/17 - 9:42 AM

Skipped  
No approvers found  
Department Approval Review

Pending  
Multiple Approvers  
Dept Director Signer

Not Routed  
Multiple Approvers  
FIN Analyst Approver

Not Routed  
Multiple Approvers  
Attorney Signer

Comment History

Approval Alerts

Return to Document Management

You have approved the contract and it has been routed to the next Approver in the process.

17. Click on the **Return to Document Management** link at the bottom of the page to return to the *Document Management* page.

**NOTE:** The Status of the contract will remain at Pending Approval until all Approvers in the chain have approved the document.

Home
Menu
Help

My Preferences

Sign out

18. To sign out of the *Supplier Portal*:

- a. Click the middle button on the ribbon located in the top right hand of your screen.
- b. Click the **Sign out** link.

This completes the electronic approval process for Professional and Client Services Agreements.

## Denying Contract Document

Use the steps below to deny a contract document.

Document Management		
<b>SetID</b>	MODEL	<b>Contract ID</b> SYSTEM TEST - PSA
<b>Supplier</b>	ICEBERG TECHNOLOGY GROUP	
<b>Contract Style</b>	Procurement Contract	
<b>Document Type</b>	Professional Services Agrmnt	
<b>Description</b>	System Test - PSA	
<b>Administrator</b>	Kempe,Cheryl	<input checked="" type="checkbox"/> Checklist Completed              Completed Date: 02/07/17 3:35PM              Completed by: ERIK.FERNSTROM
<b>Sponsor</b>	<b>Department</b>	
<b>Version</b>	0.02	<b>Created On</b> 02/07/17 3:30PM
<b>Status</b>	Pending Approval	<b>Last Modified On</b> 03/16/17 9:50AM
<a href="#">Document Details</a> <a href="#">Supporting Document/Checklists</a> <a href="#">Original Contract/Amendment Information</a>		
This document requires your approval. Review the document as directed, then select Approve or Deny.		
<div style="display: flex; justify-content: space-around;"> <span>Approve</span> <span style="border: 2px solid red; padding: 2px;">Deny</span> </div>		
<b>View and Edit Options:</b> <a href="#">View Document</a> <a href="#">Add/Modify Attachments/Related Documents</a> <a href="#">Document Modification Summary</a> <a href="#">Document Version History</a>		
<b>Review and Approval:</b> Empty section		
<b>Other Document Actions:</b> <a href="#">Generation Log</a>		

1. From the *Document Management* page, click the **Deny** button.


The *Document Approval Status* page displays.

### Document Approval Status

SetID MODEL
Contract ID SYSTEM TEST - PSA

Supplier ICEBERG TECHNOLOGY GROUP

#### Approval Confirmation

 This Document Will Be "Denied". Press "Deny" to Confirm or "Cancel" to return without denying.

Deny
Cancel


#### Review/Edit Approvers

### Professional Service Agreement

#### :Pending


PSA (Over \$100,000.00)

#### Pending


Multiple Approvers  
Supplier Signer


→

#### Skipped


No approvers found  
Department Approval Review


→

#### Not Routed


Multiple Approvers  
Dept Director Signer


→

#### Not Routed


Multiple Approvers  
FIN Analyst Approver

#### Comment History

#### Approval Alerts

 -

#### Approval Comments

Deny
Cancel

[Return to Document Management](#)

**NOTE:** When you deny the document, you are **required** to add a comment so the Document Owner knows your reason for denying the document, can rectify it and restart the approval process.

- Click in the **Approval Comments** field.

#### Approval Comments


- Enter **your comment**.

### Document Approval Status

SetID MODEL
Contract ID SYSTEM TEST - PSA

Supplier ICEBERG TECHNOLOGY GROUP

#### Approval Confirmation

 This Document Will Be "Denied". Press "Deny" to Confirm or "Cancel" to return without denying.

Deny
Cancel

#### Review/Edit Approvers

### Professional Service Agreement

:Pending

PSA (Over \$100,000.00)

Pending
Multiple Approvers  
Supplier Signer

→

Skipped
No approvers found  
Department Approval Review

→


Not Routed
Multiple Approvers  
Dept Director Signer

→

Not Routed
Multiple Approvers  
FIN Analyst Approver

Comment History

#### Approval Alerts

 -

#### Approval Comments

The start date is not correct in the document, please update.

Deny
Cancel

[Return to Document Management](#)

- When you have entered the comment, click either one of the **Deny** buttons to confirm the denial.

**Document Approval Status**

SetID MODEL Contract ID SYSTEM TEST - PSA  
Supplier ICEBERG TECHNOLOGY GROUP

▼ Review/Edit Approvers

**Professional Service Agreement**

▼ :Denied

PSA (Over \$100,000.00)

**Denied**

Norling, Dan - Iceberg  
Supplier Signer  
03/16/17 - 10:18 AM

**Skipped**

No approvers found  
Department Approval Review

**Not Routed**

Multiple Approvers  
Dept Director Signer

**Not Routed**

Multiple Approvers  
FIN Analyst Approver

► Comments

► Comment History

**Approval Alerts**

Return to Document Management

The status changes to *Denied*. The Document Owner will receive an email stating that you denied the document along with your comment.

5. Click the **Return to Document Management** link at the bottom of the page to return to the *Document Management* page.

My Preferences

Sign out

6. To sign out of the *Supplier Portal*:
  - a. Click the middle button on the ribbon located in the top right hand of your screen.
  - b. Click the **Sign out** link.

This completes the electronic denial process for Professional and Client Services Agreements.



### Searching for and Viewing Contract Documents

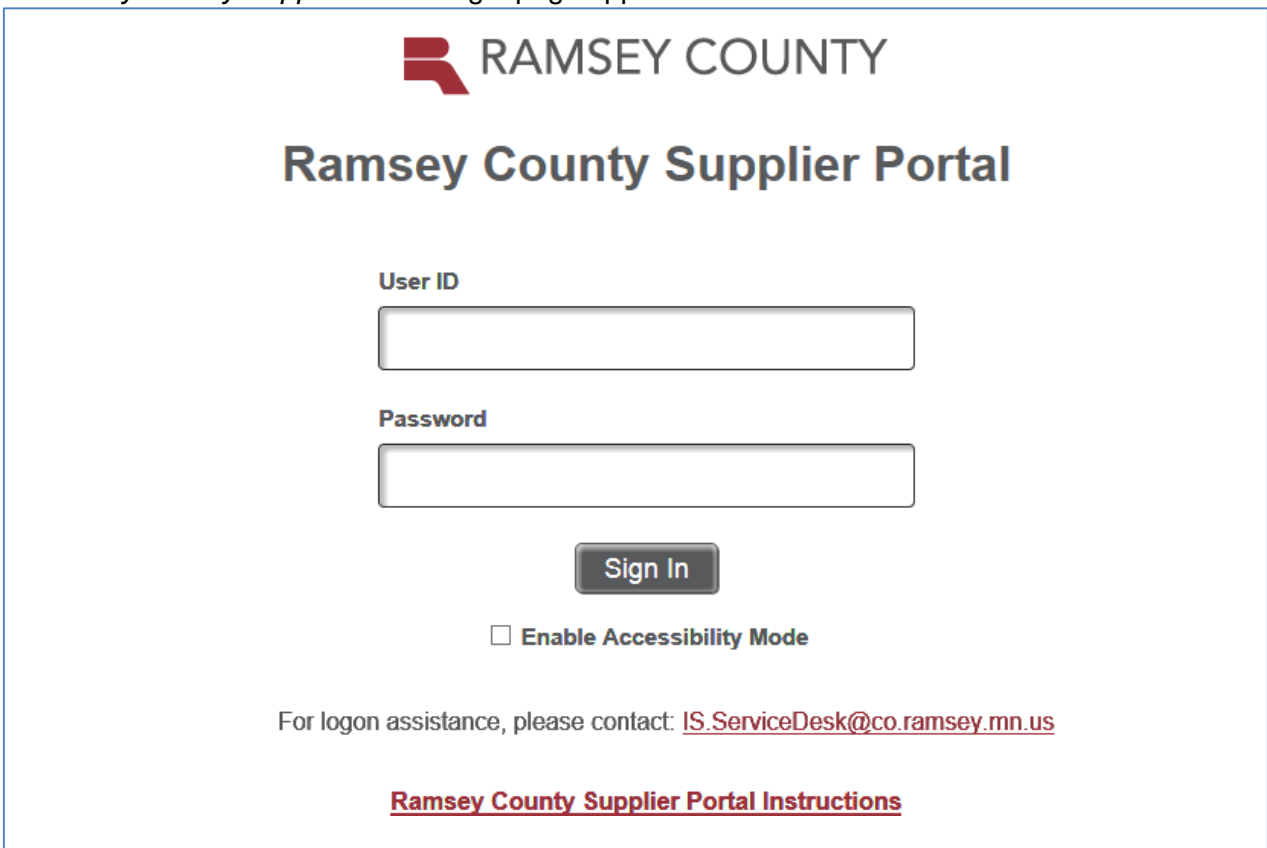
The Ramsey County Supplier Portal allows Supplier users to access and view contract documents. This enables users to look up and review previously executed documents as well as documents in pending approval status that are in the approval cycle.

See below for steps on how to search for and access contract documents.

1. Navigate to the Supplier Portal via the email link or by copying and pasting the following link in your browser.

<https://aspensp.host.co.ramsey.mn.us>

The *Ramsey County Supplier Portal* login page appears.



RAMSEY COUNTY

## Ramsey County Supplier Portal

User ID

Password

Sign In

☐ Enable Accessibility Mode

For logon assistance, please contact: [IS.ServiceDesk@co.ramsey.mn.us](mailto:IS.ServiceDesk@co.ramsey.mn.us)

[Ramsey County Supplier Portal Instructions](#)

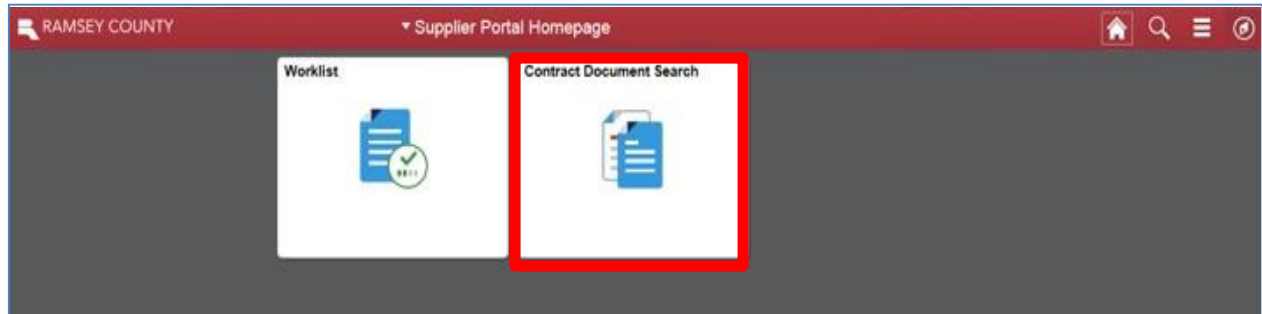
2. Click in the **User ID** field.
3. Type your **User ID**.

**Note:** Your **User ID** and **Password** was sent to you in a separate email with the subject: **Confirmation Email - Ramsey County Supplier Portal Log In Information**. If you do not have your **User ID** or **Password**, please email [IS.ServiceDesk@co.ramsey.mn.us](mailto:IS.ServiceDesk@co.ramsey.mn.us) to obtain your login credentials.

4. Click the **Sign In** button or press **Enter**.

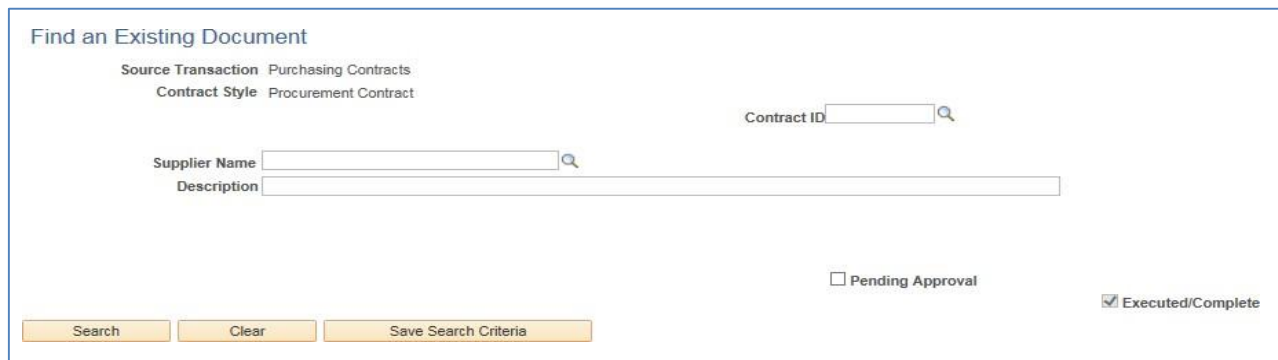


The *Supplier Portal Homepage* appears.



- To view executed/completed contracts, click on the **Contract Document Search** tile on the right hand side of your screen.

The ***Find an Existing Document*** page appears.



There are several search fields available. See below for information on each.

**Supplier Name** – Click the Look Up to select your company name. Useful if you are associated with multiple Suppliers in the system and want to narrow the search results.

**Description** – Free form search field using the contract description.

**Contract ID** – Click the Look Up to see a list of all your contract documents in the system.

**Note:** The contract list in the Contract ID look up contains all contract documents regardless of status. However, the system only allows you to view contract documents that are either in executed or pending approval status. If a contract is selected from the list that is not in an executed or pending approval status, the search results will not return the selected contract.


**Pending Approval** – Select this checkbox to include contract documents that are in pending approval status in the search results.

**Note:** If you click the **Search** button without entering any search criteria, all contract documents that are in executed status will display in the search results.

- To view an Executed/Complete contract, use one of the search options. For this example, the Contract ID field is used.

**Find an Existing Document**

Source Transaction: Purchasing Contracts  
Contract Style: Procurement Contract

Contract ID:  

Supplier Name:

Description:

☐ Pending Approval ☒ Executed/Complete

7. Click the Look Up button in the Contract ID field.  
The **Look Up Contract ID** page appears.

**Look Up Contract ID** Help

Contract ID:  begins with

Document Administrator:  begins with

[Basic Lookup](#)

**Search Results**


View 100 First 1-20 of 20 Last


SetID	Contract ID	Document Administrator	Description
MODEL TST_2_28_01		CHERYL.KEMPE	BA000020 Tech Consulting Srvcs
MODEL TEST-SCM		ERIK.FERNSTROM	Test Portal
MODEL SYSTEM_TEST_SEML		CHERYL.KEMPE	System Test - SEML
MODEL SYSTEM_TEST_DESIGN_BLD_1		CHERYL.KEMPE	System Test - PSA
MODEL SYSTEM_TEST_DB_P2		CHERYL.KEMPE	System Test - Design Build P2
MODEL SYSTEM_TEST_CUSTOM_CONT		TONY.SOFIE	System Test - PSA
MODEL SYSTEM TEST - PSA		CHERYL.KEMPE	System Test - PSA
MODEL SYSTEM TEST - CSA_2		CHERYL.KEMPE	CSA Approval Test
MODEL SYSTEM TEST - CSA		CHERYL.KEMPE	System Test - CSA
MODEL PSA_TRAINING		CHERYL.KEMPE	Training - PSA Contract
MODEL PSA_CONTRACT		CHERYL.KEMPE	Training - PSA Contract

8. Select a contract from the list. Keep in mind that the contract document must be in executed or pending approval status in order for the search to return the document.

**Find an Existing Document**

Source Transaction Purchasing Contracts  
Contract Style Procurement Contract

Contract ID  

Supplier Name  

Description


☐ Pending Approval ☒ Executed/Complete


**Search** Clear Save Search Criteria

9. The selected contract is populated in the **Contract ID** field. Click the **Search** button.  
The search results display below the search buttons.

**Find an Existing Document**

Source Transaction Purchasing Contracts  
Contract Style Procurement Contract



Contract ID  

Supplier Name  

Description

☐ Pending Approval ☒ Executed/Complete

Search Clear Save Search Criteria

**Search Results** Personalize Find View All   First 1 of 1 Last

Delete	Document Keys	Description	Document Version	Amendment	Document Status	Days In Status	Awaiting User
<input type="checkbox"/>	<b>MODEL / PSA_CONTRACT</b>	Training - PSA Contract	0.02	0	Executed	28	Kempe, Cheryl

10. Click the contract link to display the document management page where you can view the contract as well as associated attachments.

The **Document Management** page appears.

#### Document Management

**SetID** MODEL

**Supplier** ICEBERG TECHNOLOGY GROUP

**Contract Style** Procurement Contract

**Document Type** Professional Services Agrmnt

**Description** Training - PSA Contract

**Administrator** Kempe, Cheryl

**Sponsor**

**Contract ID** PSA\_CONTRACT

[Return to Document Search](#)

☒ **Checklist Completed**   **Completed Date:** 02/15/17 3:15PM   **Completed by:** CHERYL KEMPE

**Department**

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**Version** 0.02

**Status** Executed

**Created On** 02/15/17 10:57AM

**Last Modified On** 02/15/17 3:40PM

**Executed On** 02/15/17 3:40:54PM

Document Details

Supporting Document/Checklists

Original Contract/Amendment Information

---

**View and Edit Options:**

[View Document](#)

[View Executive Summary](#)

[Add/Modify Attachments/Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

**Review and Approval:**

**Other Document Actions:**

[Generation Log](#)

Several actions are available on the Document Management page:

- Click the **View Document** button to view the contract document in Microsoft Word.
- Click the **View Executive Summary** button to view the summary document related to the contract in Microsoft Word.
- Click the **Add/Modify Attachments/Related Documents** link to view attachments related to the contract.

11. Once you have viewed the contract, and/or associated documents – either complete another search or sign out.

- a. To complete another search, click the **Return to Document Search** link. The Find an Existing Document page displays and you can search for a new contract document.
- b. To sign out of the *Supplier Portal*, click the middle button on the ribbon located in the top right hand of your screen.
- c. Click the **Sign out** link.

