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# STATEMENT OF WORK USER GUIDE

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SEPTEMBER 1, 2017

TEXAS DEPARTMENT OF INFORMATION RESOURCES  
[WWW.DIR.TEXAS.GOV](http://WWW.DIR.TEXAS.GOV)

Statement of Work User Guide

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# System Requirements and Browser Compatibility

## Browser Version

System features are best viewed in the browser versions listed below. Other browsers or versions may not display correctly.

- Google Chrome 34+(Recommended)
- Firefox 26+
- Internet Explorer 10+

## Who Should Use this System?

- State agencies should utilize the form to submit their Draft and Final SOWs to DIR for review and approval.
- State agency purchasers who have been identified by their agency as:
  - Users - The submitter will only have access to the SOWs that they submitted
  - Superusers - A super user will have access to all of the SOW's for that particular agency

## Customer Portal Login

To gain access to the SOW Application, approved Agency Users must log in to the Customer Portal by selecting "Sign in to My DIR" from the DIR home page (<http://dir.texas.gov>).



- Requests to add, change or remove Users need to be submitted from a Superuser at the agency to: [identity.support@dir.texas.gov](mailto:identity.support@dir.texas.gov).



**DIR**

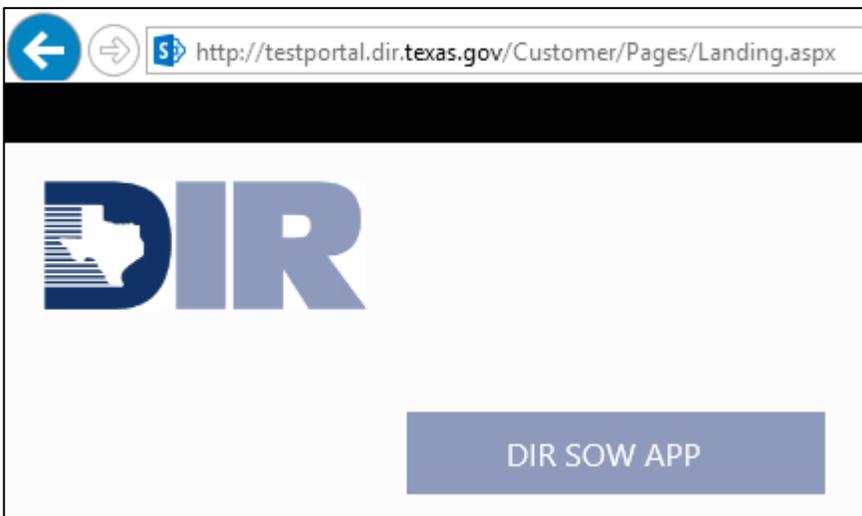
**External Users** Please sign in below to continue:

Username:

Password:

**Remember Me**

Once the User is authenticated, the Customer Portal will be displayed for the appropriate agency. On the left navigation pane, there will be a link to the SOW Application. Select the *SOW link* to launch your agency's instance of the SOW Application.



## SOW Application

This application contains all previously submitted SOW records for your agency. The initial page displayed is the *application landing page*. From this page, Agency Users may view existing SOWs, initiate the submission process for new SOWs, upload additional documents or withdraw an SOW. This page also serves as the central location for Users to monitor the status of submitted SOWs.

- Note – Those users who have been established as “super users” will be able to view any/all SOWs submitted by an agency. All other users will only see those SOWs which they submitted.

The screenshot displays the SOW Application interface. At the top left is the DIR logo. Below it is a navigation menu with options: Draft, Final, Amendment Draft, and Amendment Final. To the right of the menu is a help box with instructions on how to submit a Draft SOW, perform actions on submitted SOWs (submit, withdraw, amend), and contact technical support. A 'submit SOW To DIR' button is also present.

Below the help box is a table with the following columns: Select, SOW ID, SOW Submitter, Name, SOW Type, Item ID, SOW Status, SOW Name, Created, DIR Due Date, DIR Contract Manager Assigned, and Expedite. The table contains 18 rows of SOW records. A message above the table states: 'There are no items to show in this view of the "sow\_documents" document library. To add a new item, click "New" or "Upload".'

Select	SOW ID	SOW Submitter	Name	SOW Type	Item ID	SOW Status	SOW Name	Created	DIR Due Date	DIR Contract Manager Assigned	Expedite
	OAG-000851	Mary Vickery Test	Need to include in next round of changes with Phase II	Draft		DIR Review	Mary test	5 days ago	2/2/2017	mary.vickery	No
	OAG-000845	Mary Vickery Test	draft test	Draft		Approved	Test draft 12092016	December 09	1/26/2017	mary.vickery	No
	OAG-000845	Mary Vickery Test	120915 Final SCW Test	Final		DIR Review	Test draft 12092016	December 09	12/14/2016	mary.vickery	No
	OAG-000830	Elizabeth Test OAG	Test Document	Draft		Approved	Test SOW - EL	December 07	1/24/2017	kelly.welch	No
	OAG-000838	Elizabeth Test OAG	Test Document - Copy	Final		Approved for Signature	Test SOW - EL	December 07	12/12/2016	kelly.welch	No
	OAG-000837	Kelly Welch Test	TEST SOW	Draft		Approved	Sample Draft	December 07	1/24/2017	elizabeth.lopez	No
	OAG-000837	Kelly Welch Test	TEST SOW	Final		Approved for Signature	Sample Draft	December 07	12/12/2016	elizabeth.lopez	No
	OAG-000795	Mary Vickery Test	Sample draft SOW	Draft		Withdrawn	really awesome SOW	August 30	10/11/2016	william.fang	No
	OAG-000794	Mary Vickery Test	TMD Draft Test	Draft		Approved	abd	August 25	10/10/2016	william.fang	No
	OAG-000794	Test William OAG	TMD Test Final	Final		Signed and Closed	abd	August 31	9/9/2016	william.fang	No
	OAG-000794	Mary Vickery Test	123 Final Test	AmendmentDraft	OAG-000794-F797-AMD-1	Approved	abd	December 07	1/24/2017	kelly.welch	No
	OAG-000794	William Fang	AmendmentTest-001 - Copy	AmendmentDraft	OAG-000794-F797-AMD-2	Approved	abd	December 07	1/24/2017	william.fang	No
	OAG-000794	Mary Vickery Test	000794 Amendment 1 Final	AmendmentFinal	OAG-000794-F797-AMD-2	Signed and Closed	abd	December 07	12/12/2016	william.fang	No
	OAG-000794	William Fang	AM_002 - Exp	AmendmentDraft	OAG-000794-F797-AMD-3	DIR Review	abd	December 12	1/27/2017	william.fang	No
	OAG-000794	Test William OAG	Multi-Final Test 001	Final		Approved for Signature	abd	December 13	12/16/2016	william.fang	No

## Statement of Work User Guide

On the landing page, you will see several columns:

- SOW ID – A system generated, unique, ID assigned to each Statement of Work.
  - There is a naming convention applied to each new (Draft) submission.
  - This ID will be used throughout the life of a SOW. It serves as the parent ID for the subsequent submissions/documents related to the SOW/contact.
    - When the Final of the SOW is submitted, it will be associated with this ID.
    - When/if one submits Amendments, it will be associated with this ID.
- Name – The name of the document to be uploaded for review.
  - Note: Avoid using special characters in the name given to the files that are uploaded to the SOW Application. Examples of special characters include: !, ", #, \$, &, (, ), \*, +
- SOW Type - Indicates the type of SOW submission
  - Draft SOW
  - Final SOW
  - Amendment Draft
  - Amendment Final
- SOW Status - Reflects the current status of a submitted SOW.
- SOW Name – The name that the user gives to a submission (record) in the SOW Application. This is a free form text field.
  - Note: Avoid using special characters in the name. Examples of special characters include: !, ", #, \$, &, (, ), \*, +
- Created - Date on which the SOW was submitted for review.
- DIR Due Date - Anticipated date for DIR to complete processing the SOW; thirty (30) business days for draft and three (3) business days for final reviews, with day one beginning the 1<sup>st</sup> full day from date submitted.
- DIR Contract Manager Assigned - Name of the Contract Manager assigned to process the SOW.
- Expedite - Indicates whether the Submitter's request to review a SOW must be Expedited; Expedited Requests require a letter from Agency Executive Director, or their designee, and gives DIR three (3) business days to review.

Key Points about the landing page.

- Each column can be used to sort the information (rows) displayed, and filters can be applied to some of these columns, except for the "name" column.
  - To sort – click on the column heading (text).
    - An arrow will appear next to the column heading. It will either point up (indicating it's sorting by ascending order) or down (indicating the list is being sorted in descending order). Clicking the column heading a second time will reverse the order.
  - To filter – one must be careful to click immediately to the right of the column heading. A pop up box will appear.
    - To apply the filter, check the box or boxes you wish to include in the filter and then click the close button.

Statement of Work User Guide

Select    SOW ID    SOW Submitter↑    Name    SOW Type    Item ID    SOW\_Status

There are no items to show in this view of the "sow\_documents" document library. To add a new item, click the plus icon.

✓	Select	SOW ID	SOW Submitter	Name	SOW Type ↑	Item ID	SOW_Status
		OAG-000794	Mary Vickery Test	123 Final	A↓ <b>A on Top</b> Z↓ <b>Z on Top</b>	OAG-000794-F797-AMD-1	A
		OAG-000794	William Fang	Amendment 001 - Cop	<input type="checkbox"/> <b>AmendmentDraft</b> <input type="checkbox"/> <b>AmendmentFinal</b>	OAG-000794-F797-AMD-2	A
		OAG-000794	William Fang	AM_002 -	<input type="checkbox"/> <b>Draft</b> <input type="checkbox"/> <b>Final</b>	OAG-000794-F797-AMD-3	D
		OAG-000794	Mary Vickery Test	768 draft amendment	<input type="checkbox"/> <b>AmendmentDraft</b> <input type="checkbox"/> <b>AmendmentFinal</b> <input type="checkbox"/> <b>Draft</b> <input type="checkbox"/> <b>Final</b>	OAG-000794-F797-AMD-4	A

Close

**The submission process** consists of multiple steps. The submission, review and approval process for Statements of Work includes Draft SOW Submission(s) and Final SOW Submission(s). The submission of the Draft SOW is expected to take place prior to vendor solicitation. After the Draft SOW is reviewed and approved by DIR, the Agency User submits the approved SOW to the selected DIR vendors. After the agency and vendor execute a final version of the SOW, submit the Final SOW, containing signatures of the selected vendors and Agency management, for DIR’s final approval and signature.

Notes: Since Statements of Work may be awarded to multiple vendors. It is possible, within the SOW Approval Application, to submit multiple “Final” SOWs for one Draft (Parent record).

Should a signed and approved (Final) SOW/Contract needs to be amended, a similar process will be followed. Users will need to locate the Final (Signed and Closed) SOW which is to be amended. A Draft Amendment will need to be submitted. Once it is approved, signatures from the Vendor and the Agency Management should be collected, so that the signed copy can be submitted as a Final Amendment. The same review time applies to Amendments as Draft and Final submittals.

## Instructions for Draft Statement of Work Submissions

Click the **Submit SOW to DIR** link at the top of the application landing page to launch the SOW Draft Submission page.

SOW Type	
●●● Draft	<ul style="list-style-type: none"> <li>▪ To submit a Draft SOW to DIR, click the button on the right</li> <li>▪ Click on "... " on the submitted SOW to perform the following actions:                             <ul style="list-style-type: none"> <li>◦ Submit a Final SOW, withdraw a SOW or submit Addition Documents</li> <li>◦ Submit a Draft Amendment or submit a Final Amendment</li> </ul> </li> <li>▪ Click <a href="#">here</a> to email technical support for assistance with this site</li> </ul>
●●● Final	
●●● Amendment Draft	
●●● Amendment Final	

Submit SOW To DIR

Select	SOW ID	SOW Submitter↑	Name	SOW Type	Item ID	SOW_Status	SOW Name	Created	DIR Due Date	DI
There are no items to show in this view of the "sow_documents" document library. To add a new item, click "New" or "Upload".										

This page allows users to submit a Draft SOW document along with all data relevant to the request.

### SOW Draft Submission

*Statement of Work User Guide*

[DIR Website](#)
[SB20 Quick Reference Sheet](#)

*Asterisks (\*) denote a required field.*

SOW Name:

SOW Scope:

Estimated Value:

**SERVICES TYPES**

- Cloud Assessment Services
- Cloud Broker Services
- Cloud Infrastructure as a Service
- Cloud Platform as a Service
- Comprehensive Web Development and Management Services
- Content Management

**CONTRACT NUMBERS AND VENDORS**

Select/Deselect All

**ADDITIONAL CONTRACT NUMBERS**

**COMMENTS**

**UPLOAD SOW DRAFT FILE:**

**SOW EXPEDITE:**

Note: Submit one (1) SOWDraft file. Combine multiple documents into a single PDF file if needed.

<b>DIR DUE DATE:</b>	9/19/2016	<span style="background-color: #4F81BD; color: white; padding: 5px 15px; border-radius: 5px;">REVIEW AND SUBMIT</span>
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### SOW Draft Submission

### Draft SOW Header

1. **Enter SOW Name:** The name of your project. This should be used throughout the submission process for reference.
2. **Enter SOW Scope:** Enter a brief description of the SOW Scope (750 characters or less).
3. **Enter Estimated Value:** Enter the estimated value of your procurement. This should include the purchase order amount and any anticipated Purchase Order Change Notices (POCNs). *Note: Maximum value is \$1,000,000. You may include commas, but do not enter dollar sign. Do not include decimals or cents.*

### Services Type

1. Select the appropriate service type for the SOW.
2. The service type selected should correspond to the DIR vendor contract(s) to whom you will submit your pricing request.

### Contract Numbers and Vendors

- This field will auto-populate by the application with the relevant Contract Numbers and Vendor names for the selected Service Type. It should correspond to the DIR vendor contract(s) to whom you will submit your pricing request. If your Estimated Value is more than \$50,000 but less than \$1 million you will be required to select three (3) or more contracts. If the Estimated Value is greater than \$1 million but not more than \$5 million, you will be required to select six (6) or more contracts. If the number of contracts available is less than the required amount, you will be required to select all available contracts.
- Select the *Select/Deselect all checkbox* to select all entries in this list.

### Additional Contract Numbers

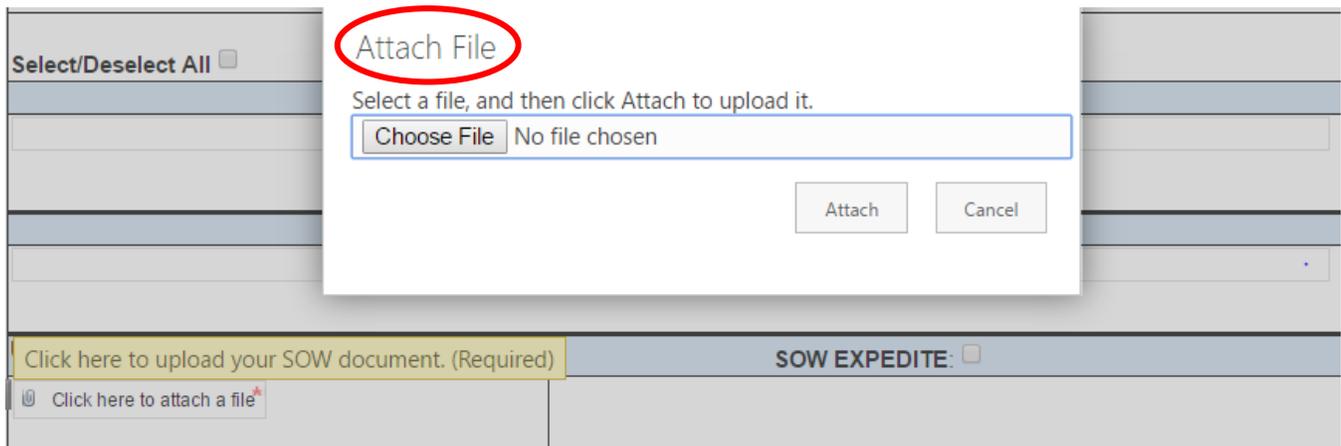
If an active DIR contract is not available for selection, you may enter that number here. The DIR SOW review process will determine if that contract should be in the list of available contracts for the Service Types selected.

### Comments

Please insert any information that you determine to be relevant. For example, add descriptive text explaining any additional contract numbers that were not available to be selected.

### Upload SOW Draft File

Upload SOW draft file(s). *Note: If you have more than one document to attach, consider scanning or consolidating files into one (1) file prior to attaching. Additional documents may be uploaded after a draft or final SOW has been submitted. Instructions for this is provided later in this User Guide.*



## SOW Expedite

If an Expedited review is needed, please select the *SOW Expedite checkbox*. You will then be required to upload your agency's Expedite letter signed by Executive Director (or designee). A letter is required to select this option.

The screenshot shows a web interface for SOW Expedite. At the top, there is a 'Select/Deselect All' checkbox. Below it is a table with several rows. A modal dialog box titled 'Attach File' is open, with the title circled in red. The dialog contains the text 'Select a file, and then click Attach to upload it.' and a 'Choose File' button next to the text 'No file chosen'. There are 'Attach' and 'Cancel' buttons at the bottom of the dialog. Below the dialog, the 'UPLOAD SOW DRAFT FILE:' section shows a file 'Example for SOW Guide.pdf' (599.83 KB). To the right, the 'SOW EXPEDITE:' checkbox is checked. A yellow tooltip points to a link that says 'Click here to upload Expedite document. (Required if SOW Expedite Checked)'. Below this, there is a button that says 'Click here to attach a file'.

### DIR Due Date

This is an auto-generated field.

- Expedite not checked = thirty (30) business days with day one (1) beginning the 1<sup>st</sup> full day from date submitted.
- Expedite checked = three (3) business days with day one (1) beginning the 1<sup>st</sup> full day from date submitted.

### Review and Submit button

Select the Review and Submit button to confirm and complete your submission.

<b>UPLOAD SOW DRAFT FILE:</b>		<b>SOW EXPEDITE:</b> <input type="checkbox"/>
1) SOW_DRAFT_PDF_EM - Copy (13).pdf 180.18 KB		
Note: Submit one (1) SOW Draft file. Combine multiple documents into a single PDF file if needed.		
<b>DIR DUE DATE:</b>	2/3/2016	<b>REVIEW AND SUBMIT</b>
<b>SOW Draft Submission</b>		

## Statement of Work User Guide

<b>Upload SOW Draft File:</b>		<b>SOW Expedite:</b> False	
 1) SOW_DRAFT_PDF_EM - Copy (13).pdf 180.16 KB			
<b>DIR Due Date:</b>	<input type="text" value="2/3/2016"/>	<input type="button" value="Edit"/>	<input type="button" value="Confirm Submit"/>
<b>SOW Draft Confirm</b>			

### Edit

Select edit button to edit any field as necessary. Once you are done editing, you will need to select the Review and Submit button to proceed.

### Confirm Submit

Select Confirm Submit button to save the record and submit it to DIR for processing.

Once a Draft SOW is submitted successfully, a confirmation message is displayed with the SOW ID and the SOW Name. The Agency User will also receive an automated email with more details around the request.

<b>Your SOW Draft has been successfully submitted to DIR!</b>	
An email will be sent to you with more detailed SOW information. Thank you.	
<b>SOW ID:</b> <b>OAG-000719</b>	<b>SOW Name:</b> New app dev for agency



### Final SOW Header

1. **SOW ID:** Note: Only *approved* SOW Drafts will be displayed in this dropdown list. This reference number was provided when receipt of your Draft SOW was confirmed. Please use this reference number throughout the submission process. *Note: Draft SOWs created prior to March 7, 2016 may have been issued a new SOW ID# with the launch of the new portal. Please contact the DIR Contract Manager that reviewed the SOW if you cannot locate the ID#.*
2. **SOW Name:** This is the name of the SOW that was provided during the Draft SOW Submission.
3. **SOW Scope:** SOW Draft Scope will be displayed. This is an editable field and can be modified as necessary.
4. **SOW Estimated Value:** This is the estimated value that was provided during the Draft SOW Submission.
5. **SOW Final Value:** Enter the final value for the SOW. This should include the purchase order amount and any anticipated Purchase Order Change Notices (POCNs). *Note: Maximum value is \$5,000,000. You may include commas, but do not enter dollar signs. Do not include decimals or cents.*
6. **SOW Start Date:** Enter the anticipated start date for the SOW. NOTE: The start date may not be sooner than the DIR Due Date.
7. **SOW End Date:** Enter the expected end date for the SOW.

### Contract Awarded

Select the awarded DIR contract from the dropdown list.

SOW Start Date:  SOW End Date:

Select Contract Awarded:

- DIR-TSO-2558 - KPMG LLP
- DIR-TSO-2584 - Northrop Grumman Systems Corporation

Choose Awarded Contract.

SOW Comments:

The selected contract will be displayed here.

Select Contract Awarded:

DIR-TSO-2584 - Northrop Grumman Systems Corporation

Final Selected Contract:

DIR-TSO-2584 - Northrop Grumman Systems Corporation

### SOW Comments

Please insert any information that you determine to be relevant in the Comments field.

## Upload Final SOW Document

1. Upload Final SOW that has been signed by the agency and the awardee. The *Final SOW Document must be in Adobe (pdf) format. If you have more than one (1) document to attach, consider scanning or consolidating files into one (1) file prior to attaching.*

The screenshot shows a web interface for uploading a Statement of Work (SOW) document. A modal dialog box titled "Attach File" is open, prompting the user to "Select a file, and then click Attach to upload it." The dialog includes a file selection field with a "Browse..." button, and "Attach" and "Cancel" buttons. In the background, the main form is partially visible, showing fields for "SOW Scope:", "SOW Estimated Value:", "SOW Start Date:", "Select Contract A...", "Final Selected Contract:", and "SOW Comments:". A red box highlights the "Attach File" dialog. Another red box highlights a message box that says "Please upload SOW document" and a link that says "Click here to attach a file".

### Note –

- It is important that the name of the file that you're uploading is unique, different from any other document that has been uploaded to this site/application in the past.
- Avoid using special characters in the name given to the files that are uploaded to the SOW Application. Examples of special characters include: !, ", #, \$, &, (, ), \*, +

## DIR Due Date

The DIR SOW review process is expected to take no more than three (3) business days with day one (1) beginning the 1<sup>st</sup> full day from date submitted.

## Review and Submit

Select "Review and Submit" to complete validation of the Final SOW form to DIR for review, approval and signature.

The screenshot shows the "SOW Final Review" form. At the top, there is a section titled "Upload Final SOW Document:" with a file upload icon and a list of uploaded files: "3) SOW\_FINAL\_PDF\_EM - Copy (13).pdf" with a size of "181.13 KB". Below this, there is a field for "DIR Due Date:" with the value "12/28/2015". A red box highlights the "Review and Submit" button. At the bottom of the form, there is a blue bar with the text "SOW Final Review".

<b>Final SOW Document:</b>	
 3) SOW_FINAL_PDF_EM - Copy (13).pdf 181.13 KB	
DIR Due Date:	<input type="text" value="12/28/2015"/>
<input type="button" value="Edit"/> <input type="button" value="Submit"/>	
<b>SOW Final Review</b>	

### Edit

Select this button to edit any field as necessary. Once you are done editing, you'll need to select the Review and Submit button to proceed.

### Submit

Select this button to save the record and submit it to DIR's contract management staff for processing.

Once a Final SOW is submitted successfully, a confirmation message is displayed with the SOW ID and the estimated DIR Due Date.

<p>Your Final SOW has been successfully submitted to DIR! An email will be sent to you with more detailed SOW information. Thank you.</p>	
<b>SOW ID</b>	<b>DIR Due Date</b>
OAG-000691	8/11/2016

## Actions that can be taken at any point in the lifecycle of a SOW.

### Withdrawing a Submittal

Both draft and final SOWs may be withdrawn by an Agency. Once an SOW is withdrawn, no further action can be taken by the submitting Agency or DIR.

From the SOW landing page, locate the SOW to be withdrawn. Click on the ellipsis (...) icon and select Withdraw:

**SOW Type**

- ... Draft
- ... Final
- ... Amendment Draft
- ... Amendment Final

- To submit a Draft SOW to DIR, click the button on the right
- Click on "..." on the submitted SOW to perform the following actions:
  - Submit a Final SOW, withdraw a SOW or submit Additional Documents
  - Submit a Draft Amendment or submit a Final Amendment
- Click [here](#) to email technical support for assistance with this site

**DIR**  
Dept. of Information Resources

Submit SOW To DIR

Select	SOW ID	SOW Submitter	Name	SOW Type	Item ID	SOW_Status	SOW Name
There are no items to show in this view of the "sow_documents" document library. To add a new item, click "New" or "Upload".							
✓ Select	SOW ID	SOW Submitter	Name	SOW Type	Item ID	SOW_Status	SOW Name
<input type="checkbox"/>	OAG-000851	Mary Vickery Test	Need to include in next round of changes with Phase II	... Draft			DIF
<input type="checkbox"/>	OAG-000845	Mary Vickery Test	draft test	...			Ap
<input checked="" type="checkbox"/>	OAG-000845	Mary Vickery Test	120915 Final SOW Test	...			DIF
<input type="checkbox"/>	OAG-000838	Elizabeth Test OAG	Test Document - Copy	...			DIF
<input type="checkbox"/>	OAG-000838	Elizabeth Test OAG	Test Document ✱	...			841-AMD-1 DIF
<input type="checkbox"/>	OAG-000837	Kelly Welch Test	TEST SOW	...			Ap
<input type="checkbox"/>	OAG-000795	Mary Vickery Test	Sample draft SOW	...			Wi
<input checked="" type="checkbox"/>	OAG-000794	Mary Vickery Test	TMD Draft Test	...			Ap

- View Properties
- Additional Documents
- Withdraw

A new page will appear. Enter a comment and select with Withdraw button. An Agency does not need to provide DIR justification for the withdrawal, only a statement advising the SOW is being withdrawn.

texas.gov needs some information

Script Prompt:

Enter Withdraw reason:

OK Cancel

**SOW Type**

- ... Draft
- ... Final
- ... Amendment Draft
- ... Amendment Final

- To submit a Draft SOW to DIR, click the button on the right
- Click on "..." on the submitted SOW to perform the following actions:
  - Submit a Final SOW, withdraw a SOW or submit Additional Documents
  - Submit a Draft Amendment or submit a Final Amendment
- Click [here](#) to email technical support for assistance with this site

The Agency submitter will receive an acknowledgement e-mail for the withdrawal.

### Upload Additional Documents

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In instances where additional documentation is required, the following steps are taken.

From the SOW Portal, select Upload Additional Docs for the applicable SOW.

**SOW Type**

- Draft
- Final
- Amendment Draft
- Amendment Final

- To submit a Draft SOW to DIR, click the button on the right
- Click on "... " on the submitted SOW to perform the following actions:
  - Submit a Final SOW, withdraw a SOW or submit Additional Documents
  - Submit a Draft Amendment or submit a Final Amendment
- Click [here](#) to email technical support for assistance with this site



Submit SOW To DIR

Select	SOW ID	SOW Submitter	Name	SOW Type	Item ID	SOW_Status	SOW Name
There are no items to show in this view of the "sow_documents" document library. To add a new item, click "New" or "Upload".							
✓ Select	SOW ID	SOW Submitter	Name	SOW Type	Item ID		
<input type="checkbox"/>	OAG-000851	Mary Vickery Test	Need to include in next round of changes with Phase II	... Draft			
<input type="checkbox"/>	OAG-000845	Mary Vickery Test	draft test	...			
<input checked="" type="checkbox"/>	OAG-000845	Mary Vickery Test	120915 Final SOW Test	...			
<input type="checkbox"/>	OAG-000838	Elizabeth Test OAG	Test Document - Copy	...			
<input type="checkbox"/>	OAG-000838	Elizabeth Test OAG	Test Document ✱	...			841-AMD-1
<input type="checkbox"/>	OAG-000837	Kelly Welch Test	TEST SOW	... Draft			
<input type="checkbox"/>	OAG-000795	Mary Vickery Test	Sample draft SOW	... Draft			
<input checked="" type="checkbox"/>	OAG-000794	Mary Vickery Test	TMD Draft Test	... Draft			

Upload the additional document and add comments in the comments box.

SOW Additional Document Submission

**SOW ID:** OAG-000695

**Upload Additional Document**


Additional Document notice.pdf  
116.04 KB

**Comments:**

Corrections made to SOW reflecting new point of contact.

REVIEW AND SUBMIT

Select Review and Submit.

<b>SOW Additional Document Submission</b>	
<b>SOW ID: OAG-000719</b>	
<b>Upload Additional Document</b>	
 2013.4.2 Government & Legislation.pdf 18.9 KB	
<b>Comments:</b> NOTE: Word-wrap may not be automatic - please enter carriage returns Additional documentation for SOW submitted	
<input type="text"/>	
<input type="button" value="Edit"/> <input type="button" value="Confirm Submit"/>	
<input type="text"/>	

Note:

- It's important that the name of the file that you're uploading is unique, different from any other document that has been uploaded to this site/application in the past.
- Note: Avoid using special characters in the name given to the files that are uploaded to the SOW Application. Examples of special characters include: !, ", #, \$, &, (, ), \*, +

You will have the option to edit prior to submitting. After you have reviewed your submission, select Confirm Submit.

A message will display advising the submission was successfully submitted to DIR.

**Your SOW Additional Document has been successfully submitted to DIR!**

## Amendments or Change Orders

All amendments or change orders, are to be submitted to DIR for approval. This includes any changes to the scope regardless of cost. The Amendment Review is the same two-step review process as an SOW, Draft Amendment Review and Final Amendment review.

### Submitting a Draft Amendment

To submit a Draft Amendment for an existing SOW for review and approval, the Final SOW must have the status of "Signed and Closed". If the Final SOW is not "Signed and Closed", then the option to submit a Draft Amendment will not be available.

Locate the Final SOW that you wish to amend.

Notes:

1. It may be useful to use the [sort and/or filter](#) features to locate the SOW you want to work with.
2. The system does allow for there to be multiple 'Final' SOWs for a single 'Draft' SOW. It is important to be diligent in locating and taking action on the correct 'Final' SOW.

**SOW Type**

- ... Draft
- ... Final
- ... Amendment Draft
- ... Amendment Final

- To submit a Draft SOW to DIR, click the button on the right
- Click on "... " on the submitted SOW to perform the following actions:
  - Submit a Final SOW, withdraw a SOW or submit Additional Documents
  - Submit a Draft Amendment or submit a Final Amendment
- Click [here](#) to email technical support for assistance with this site

Submit SOW To DIR

Select    **SOW ID**    **SOW Submitter**    **Name**    **SOW Type**    **Item ID**    **SOW\_Status**    **SOW**

There are no items to show in this view of the "sow\_documents" document library. To add a new item, click "New" or "Upload".

✓ Select	SOW ID ↓	SOW Submitter	Name	SOW Type ▼	Item ID	SOW_Status
	OAG-000845	Mary Vickery Test	120915 Final SOW Test	... Final		DIR Review
	OAG-000794	Test William OAG	TMD Test Final	... Final		Signed and Close
	OAG-000794	Test William OAG	Multi-Final Test 001	... Final		Approved for Sign
<input checked="" type="checkbox"/>	OAG-000792	Test William OAG	Test-022-SOW-Final	...		Signed and Close
	OAG-000770	Mary Vickery Test	120 Final Test	... Final		Signed and Close
	OAG-000768	Mary Vickery Test	118 Final Test	... Final		Signed and Close
	OAG-000767	Mary Vickery Test	117 Final Test	... Final		Signed and Close
	OAG-000766	Mary Vickery Test	116 Final Test	... Final		Signed and Close
	OAG-000765	Mary Vickery Test	115 Final Test	... Final		Signed and Close

Upon selecting "Draft Amendment", a screen will appear. This form is like the form used for the submission of Draft and Final SOWs.

SOW Draft Amendment	
<b>SOW ID:</b>	OAG-000792
<b>SOW Amendment Type:</b>	AmendmentDraft
<b>Current SOW Final Value:</b> \$ 75000	<i>Asterisks (*) denote a required field.</i>
<b>Revised SOW Final Value:</b> \$	<input type="text"/>
<b>Current SOW End Date:</b> 12/31/2016	
<b>Revised SOW End Date:</b>	<input type="text"/>
<b>Comments:</b> NOTE: Word-wrap may not be automatic - please enter carriage returns	
<input type="text"/>	
<b>SOW EXPEDITE:</b> <input type="checkbox"/>	
<i>File name must not contain the following common invalid characters: # % &amp; *: &lt; &gt; ? / {   }</i>	
<b>Upload AmendmentDocument:</b>	
<input type="button" value="Click here to attach a file"/>	
<b>DIR Due Date:</b>	<input type="text" value="2/7/2017"/>
<input type="button" value="Review and Submit"/>	
SOW Draft Amendment	

Note:

- It is important that the name of the file that you're uploading is unique, different from any other document that has been uploaded to this site/application in the past.
- Avoid using special characters in the name given to the files that are uploaded to the SOW Application. Examples of special characters include: !, ", #, \$, &, (, ), \*, +

The red text that you see in the header section, provide you with some reference material.

- The Current SOW Value text displays the value that was provided in either the submission of the Final SOW or the last approved Final Amendment.
- The Current SOW End Date should reflect the latest expected/estimated end date of the SOW/Contract that was provided in either the submission of the Final SOW or the last approved Final Amendment.

## Submitting a Final Amendment

To submit a Final Amendment for review and approval, there must be an approved Draft Amendment. If the Draft Amendment is not “Approved”, then the option to submit a Final Amendment will not be available.

**SOW Type**

- ... Draft
- ... Final
- ... Amendment Draft
- ... Amendment Final

- To submit a Draft SOW to DIR, click the button on the right
- Click on “...” on the submitted SOW to perform the following actions:
  - Submit a Final SOW, withdraw a SOW or submit Additional Documents
  - Submit a Draft Amendment or submit a Final Amendment
- Click [here](#) to email technical support for assistance with this site

Submit SOW To DIR

❑ Select
SOW ID
SOW Submitter
Name
SOW Type
Item ID
SOW\_Status

There are no items to show in this view of the "sow\_documents" document library. To add a new item, click "New" or "Upload".

✓ Select	SOW ID	SOW Submitter	Name	SOW Type	Item ID
	OAG-000794	Mary Vickery Test	123 Final Test	... AmendmentDraft	OAG-000794-F797-AI
	OAG-000794	William Fang	AmendmentTest-001 - Copy	... A	94-F797-AI
	OAG-000794	William Fang	AM_002 - Exp	... A	94-F797-AI
<input checked="" type="checkbox"/>	OAG-000794	Mary Vickery Test	768 draft amendment	...	94-F797-AI
	OAG-000792	Mary Vickery Test	000794 Amendment 1 draft	... A	92-F793-AI
	OAG-000770	Mary Vickery Test	770 Draft Amendment	... A	70-F790-AI
	OAG-000769	Mary Vickery Test	769 Draft Amendment	... AmendmentDraft	OAG-000769-F789-AI

- View Properties
- Additional Documents
- Withdraw
- Final Amendment

The form that appears to you, will look exactly like the form that was presented for the submission of a Draft Amendment

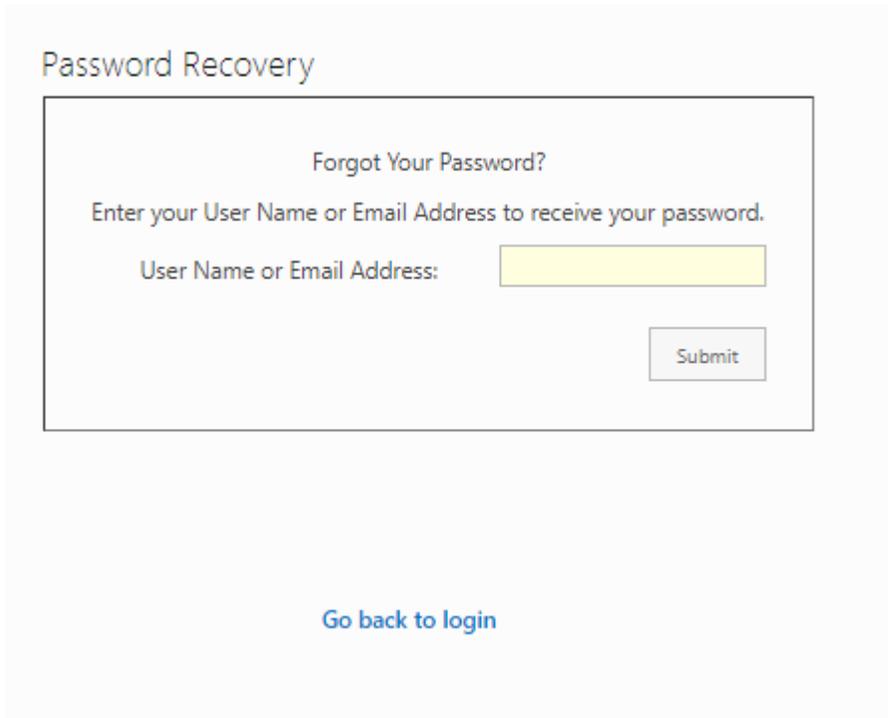
SOW Final Amendment	
<b>SOW ID:</b>	OAG-000794
<b>SOW Amendment Type:</b>	AmendmentFinal
<b>Current SOW Final Value: \$ 78000</b>	<i>Asterisks (*) denote a required field.</i>
<b>Revised SOW Final Value:\$</b>	<input style="width: 100%;" type="text" value=""/>
<b>Current SOW End Date: 01/31/2017</b>	
<b>Revised SOW End Date:</b>	<input style="width: 100%;" type="text" value=""/> 
<b>Comments:</b> NOTE: Word-wrap may not be automatic - please enter carriage returns	
<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>	
<i>File name must not contain the following common invalid characters: # % &amp; *: &lt; &gt; ? / {   }</i>	
<b>Upload AmendmentDocument:</b>	
<input type="button" value="Click here to attach a file"/>	
<b>DIR Due Date:</b>	<input type="text" value="12/28/2016"/>
<input type="button" value="Review and Submit"/>	
SOW Final Amendment	

Note:

- It is important that the name of the file that you're uploading is unique, different from any other document that has been uploaded to this site/application in the past.
- Avoid using special characters in the name given to the files that are uploaded to the SOW Application. Examples of special characters include: !, ", #, \$, &, (, ), \*, +

## Password Reset

Passwords can be reset from the sign in page. Simply select “Forgot Password” a screen will display requesting you to provide either your User Name or Email Address. Once you select submit, an e-mail will be auto-generated to the user providing a temporary password.



The screenshot shows a web form titled "Password Recovery". Inside a light gray box, the text "Forgot Your Password?" is centered. Below it, the instruction "Enter your User Name or Email Address to receive your password." is displayed. A label "User Name or Email Address:" is positioned to the left of a yellow input field. To the right of the input field is a "Submit" button. Below the main form box, there is a blue link that says "Go back to login".

## Technical Support

Should you require additional assistance with technical support simply email [identity.support@dir.texas.gov](mailto:identity.support@dir.texas.gov) and include a statement regarding your specific need.

**Chief Procurement Office**  
**Texas Department of Information Resources**