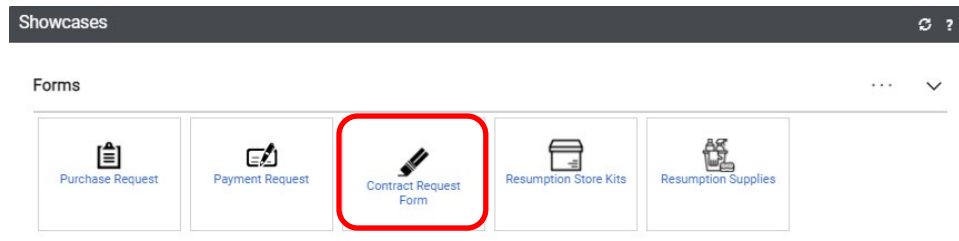


Submitting a Contract Request Form

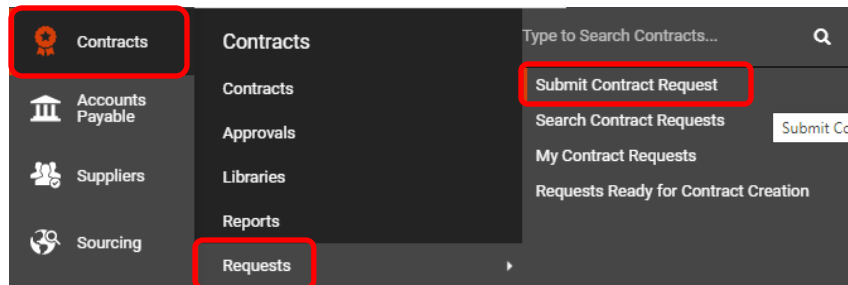
The Contract Request Form is used to send a request for a new contract to Procurement, Contracts or Construction Contracts groups. This form can also be used to obtain signatures. Once a request is submitted, it is reviewed and approved by the Procurement group.

Creating a Contract Request

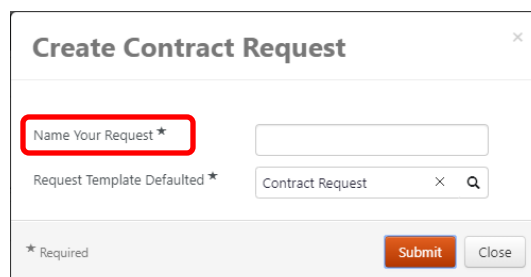
1. Under the Forms section in the Shopping Showcase, select the Contract Request Form icon.



Or, from the left hand side menu, go to **Contracts** and select **Requests** and click **Submit Contract Request**.



2. The **Create Contract Request** box will open and prompt the user to **Name Your Request**. Request name will be an available search field, so the name should be something easily searchable. Click **Submit** to continue.

A screenshot of a "Create Contract Request" modal form. The form has a title bar with a close button (X). It contains two input fields: "Name Your Request *" and "Request Template Defaulted *". The "Name Your Request *" field is highlighted with a red box. The "Request Template Defaulted *" field has a dropdown menu showing "Contract Request" with a search icon. At the bottom of the form, there is a legend for "* Required" and two buttons: "Submit" and "Close".

Submitting a Contract Request Form

3. Review the **Instructions** page and select **Next** to continue.

Back to My Contract Requests

BennyBuy Contract

Form Number: 1474996
Request Status: Incomplete

Instructions

Use this Contract Request Form to submit a request for contract review or other action to Procurement, Contracts or Construction.

NOTE: This Contract Request Form DOES NOT obtain budget approvals. Complete a PURCHASE REQUEST FORM for contracts that commit university funds during the current fiscal year. This ensures appropriate budget approvals are invoked.

If you have questions about completing this form, please contact the eProcurement Help Desk at eprocurement@oregonstate.edu, or (541) 737-3830.

Print Request | History | ?

Next >

4. The **Details** page brings in the name of the contract request as entered in the create contract request step. The name can be changed here if needed. If the name of the request is changed, select **Save Progress**. Click **Next** to continue.

BennyBuy Contract

Form Number: 1976288
Request Status: Incomplete

Details

Name Your Request *

Template: Contract Request

Contract Type: -

Description: "Internal Use Only - No Action Needed"

Print Request | History | ?

Previous Save Progress Next >

5. The **Attachments** page allows attachments to be added to the request. Click the **Add Attachments** button to add attachments as needed. Select **Next** to continue.

BennyBuy Contract

Form Number: 330973
Request Status: Incomplete

Attachments

Add Attachments

Print Request | History | ?

Previous Next >

Submitting a Contract Request Form

6. Complete the **Questions** page below and select **Save Progress**, click **Next** to continue. Please note that any field that has a Star icon indicates a required field.

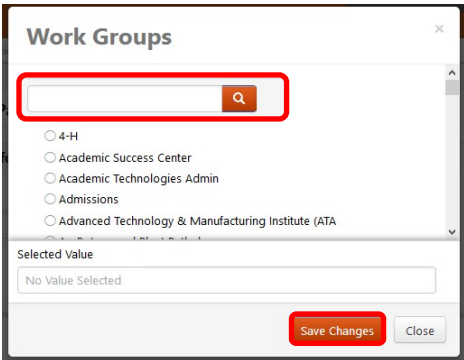
The screenshot shows the 'BennyBuy Contract' interface. The left sidebar contains navigation options: Instructions, Details, Attachments, Questions (selected), Review and Complete, Comments, and Contract Request Workflow. The main content area is titled 'Questions - Page 1' and features a 'Contract Information' section. This section includes several required fields (marked with a star icon): 'Contract Name', 'Summary' (with an 'Edit Summary' button), 'Second Party (Supplier) Name', and 'Second Party (Supplier) Email'. Below these are fields for 'Start Date' (with a calendar icon and 'Update Start Date Upon Execution' checkbox), 'WorkGroup / Department' (with a search box), 'Department Contact Name', 'Department Contact Phone Number', 'Total Estimated Dollar Value', and a 'Comments' text area (with a 2000-character limit). The 'Contract Name' and 'Summary' fields are highlighted with a red box.

- **Contract Name** – Add a Contract name; this is a required field. It can be up to 100 characters long. This will be used by PaCS for creating the contract and may not be the same as the Contract Request name.
- **Summary** – Click **Edit Summary** and provide a brief summary or statement about the contract request. Click **Done** when complete.

The screenshot shows a 'Contract Summary' dialog box. It contains a rich text editor with a toolbar. The toolbar includes options for 'Format', '(inherited font)', '(inherited size)', 'B' (bold), 'I' (italic), 'U' (underline), a list of icons for bulleted and numbered lists, a link icon, an unlink icon, an insert image icon, an insert table icon, and a source code icon. The dialog box has a 'Done' button and a 'Close' button at the bottom right.

Submitting a Contract Request Form

- **Second Party (Supplier) Name** - Enter the name of the other party to the contract. (Not OSU but the company the contract will be with)
- **Second Party (Supplier) Email** - Enter an email contact for the other party who the contract is with. This is who PaCS will reach out if they have external questions about the contract.
- **Start Date** – This is an optional field. If you know it, enter the proposed start date of the contract in MM/DD/YY format, or use the calendar function to select a date.
- **Update Start Date Upon Execution checkbox** – Check this box if the start date should be updated to the contract execution date.
- **Work Group/Department** – If the department name is known, it can be typed into the search box. Alternatively the search icon can be selected to open the work group search box. Select the **Radio Button** next to the name that best matches the department to select it. Only one department can be chosen. When done, click **Save Changes**.



- **If your Department is not listed, please enter below** - If the department is not listed in the dropdown, manually enter the Department Name.
- **Department Contact Name** – Enter a contact name for the department. It can be the person creating the contract request or someone who should answer questions about the request.
- **Department Contact Phone Number** – Enter the phone number for the department contact listed.
- **Total Estimated Dollar Value** – If applicable, enter the total estimated dollar value of the contract including all renewal terms and anything else that would cost money and raise the dollar value.
- **Comments** - If additional comments are needed, they can be entered here.

Submitting a Contract Request Form

7. Review the information and click **Complete Request**.

Section	Progress
Instructions	✓ No Required fields
Details	✓ No Required fields
Attachments	✓ No Required fields
Questions	✓ Required fields complete

8. A pop-up will ask if you are sure you want to continue. Click **Yes** to Continue.

9. You will then be taken to My Contract Requests. Selecting **Create New Contract Request** will allow you to start another from here. Under **Actions** you can edit or delete your request if the Request Status is listed as Incomplete.

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Actions
My contract	Contract Request	Lane Byrnes	Rejected	-	-	9/25/2019 11:15 AM	9/25/2019 10:10 AM	Actions
Testing	Contract Request	Lane Byrnes	Incomplete	-	-	11/4/2019 3:27 PM	11/4/2019 3:27 PM	Actions
Test Contract	Contract Request	Lane Byrnes	Rejected	-	-	11/13/2019 7:08 AM	11/6/2019 9:15 AM	Edit Delete
Test	Contract Request	Lane Byrnes	Incomplete	-	-	11/7/2019 3:00 PM	11/7/2019 3:00 PM	