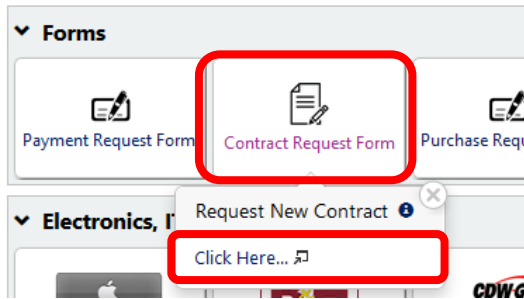


Submitting a Contract Request Form

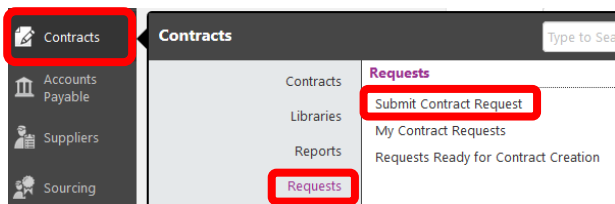
The Contract Request Form is used to send a request for a new contract to Procurement, Contracts or Construction Contracts groups. This form should only be used if this does not commit OSU to an expenditure.

Creating a Contract Request

1. Login to BennyBuy using your ONID ID and password.
2. From the BennyBuy home page, the link to the **Contract Request Form** can be found within Showcases and then under Forms. Click and select **Click Here....**



Or, under the Menu Bar, go to **Contracts** and select **Requests** and click **Submit Contract Request**.



3. The Create Contract Request box will open in a new browser tab 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 the 'Create Contract Request' form. The 'Name Your Request *' text input field is highlighted with a red box. Below it, the 'Request Template Defaulted *' dropdown menu is set to 'PaCS Request'. At the bottom right, the 'Submit' button is highlighted with a red box.

Submitting a Contract Request Form

4. Review the Instructions Page and select **Next** to continue.

The screenshot shows the 'Instructions' page for a 'BennyBuy Contract'. The left sidebar contains a navigation menu with 'Instructions' selected. The main content area includes a 'Print Request' and 'History' link, a note about budget approvals, and a 'Next >' button highlighted with a red box.

5. 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.

The screenshot shows the 'Details' page for a 'BennyBuy Contract'. The left sidebar contains a navigation menu with 'Details' selected. The main content area includes a 'Print Request' and 'History' link, a text input field for 'Name Your Request *' containing 'BennyBuy Contract', and fields for 'Template', 'Contract Type', and 'Description'. At the bottom, there are 'Previous', 'Save Progress', and 'Next >' buttons, with the latter two highlighted with red boxes.

6. The **Attachments** page allows attachments to be added to the request. Click **Next** to continue.

The screenshot shows the 'Attachments' page for a 'BennyBuy Contract'. The left sidebar contains a navigation menu with 'Attachments' selected and highlighted with a red box. The main content area includes a 'Print Request' and 'History' link, an 'Add Attachments' button, and a 'Next >' button highlighted with a red box.

❖ *Note: See Tip Sheet Adding Attachments for step-by-step instructions.*

Submitting a Contract Request Form

7. Complete the **Questions** page below and select **Save Progress**, click **Next** to continue.

The screenshot shows the 'Questions - Page 1' form for a 'BennyBuy Contract'. The left sidebar has a 'Questions' tab highlighted with a red box and a green checkmark. The main form area contains the following fields:

- Contract Name ***: Text input field containing 'Testing'.
- Summary ***: Text input field containing 'testing', with an 'Edit Summary' button below it.
- Contractor/Supplier/Other Party Name ***: Text input field containing 'testing'.
- Start Date**: Date picker field with a calendar icon, containing 'mm/dd/yyyy'. Below it is a checkbox for 'Update Start Date Upon Execution'.
- Workgroup (Select Appropriate Department)**: Search dropdown field containing 'Type to filter...'.
- Department Contact Name**: Text input field.
- Department Contact Phone Number**: Text input field.
- Total Estimated Dollar Value**: Text input field.

At the bottom right, there are three buttons: '< Previous', 'Save Progress', and 'Next >'. The 'Save Progress' and 'Next >' buttons are highlighted with red boxes.

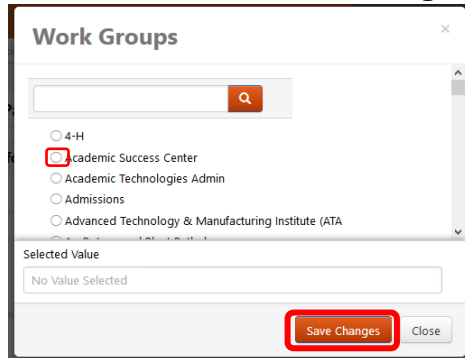
- **Contract Name** – Add a Contract name; this is a required field. It can be up to 100 characters long. This will be used by PaCS for creating the contract and is not the same as the Contract Request name.
- **Summary** – Provide a brief summary or statement about the contract request. Click **Done**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

The screenshot shows a 'Contract Summary' dialog box. It contains a rich text editor with a toolbar and a 'Save' button highlighted with a red box.

- **Contractor / Supplier / Other Party Name** - Enter the name of the other party to the contract. (Not OSU but the company the contract will be with)
- **Start Date** – This is an optional field. 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.

Submitting a Contract Request Form

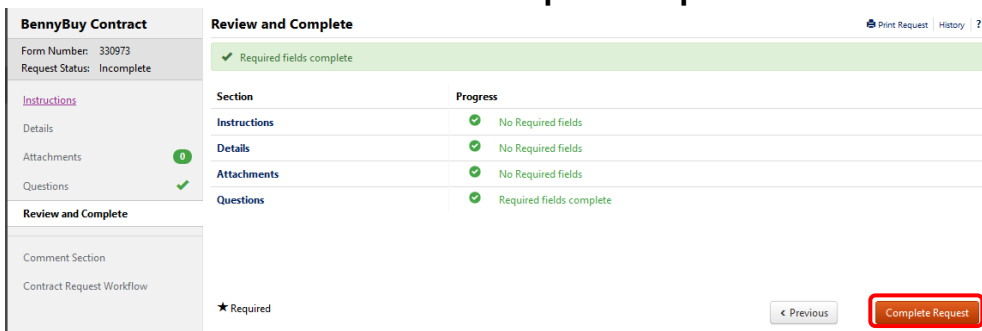
- **Work Group** – If the department name is known, it can be typed into the search box. Alternatively the search icon can be selected to open the work group search box. Select the **Radio Button** next to the name that best matches the department to select it. Only one department can be chosen. When done, click **Save Changes**.



The screenshot shows a 'Work Groups' dialog box with a search bar at the top. Below the search bar is a list of radio buttons next to department names: 4-H, Academic Success Center (highlighted with a red box), Academic Technologies Admin, Admissions, and Advanced Technology & Manufacturing Institute (ATA). Below the list is a 'Selected Value' field containing 'No Value Selected'. At the bottom right, there are two buttons: 'Save Changes' (highlighted with a red box) and 'Close'.

- **If Department (Workgroup) 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** - 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.

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

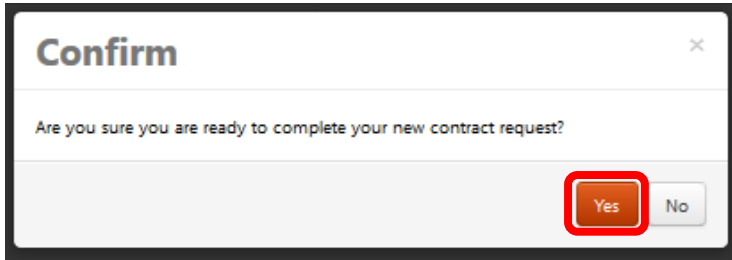


The screenshot shows the 'BennyBuy Contract' review and complete screen. The left sidebar contains navigation links: Instructions, Details, Attachments (with a green '0' icon), and Questions (with a green checkmark icon). The main content area is titled 'Review and Complete' and shows a green bar indicating 'Required fields complete'. Below this is a table with two columns: 'Section' and 'Progress'. The table has four rows: Instructions, Details, Attachments, and Questions. Each row shows a green checkmark in the 'Progress' column, indicating that all required fields are complete. At the bottom right, there are two buttons: '< Previous' and 'Complete Request' (highlighted with a red box).

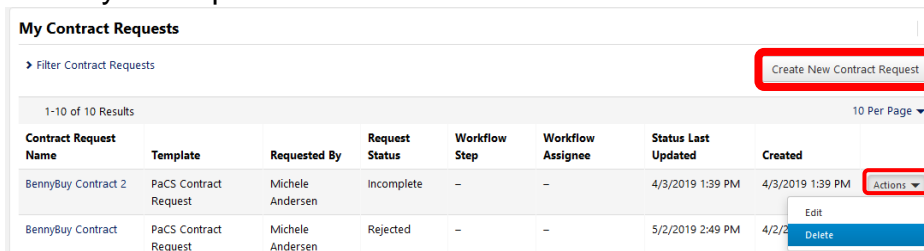
Section	Progress
Instructions	✓ No Required fields
Details	✓ No Required fields
Attachments	✓ No Required fields
Questions	✓ Required fields complete

Submitting a Contract Request Form

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



10. 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.

A screenshot of the 'My Contract Requests' web interface. At the top right, there is a 'Create New Contract Request' button highlighted with a red box. Below it is a table with columns: Contract Request Name, Template, Requested By, Request Status, Workflow Step, Workflow Assignee, Status Last Updated, and Created. The first row shows 'BennyBuy Contract 2' with status 'Incomplete'. The second row shows 'BennyBuy Contract' with status 'Rejected'. An 'Actions' dropdown menu is open for the first row, showing 'Edit' and 'Delete' options.

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Actions
BennyBuy Contract 2	PaCS Contract Request	Michele Andersen	Incomplete	-	-	4/3/2019 1:39 PM	4/3/2019 1:39 PM	Actions
BennyBuy Contract	PaCS Contract Request	Michele Andersen	Rejected	-	-	5/2/2019 2:49 PM	4/2/2019 1:39 PM	Edit Delete