Indiana University Office of Procurement Services

### STANDARD OPERATING PROCEDURE

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<tr>
<th>SOP NO:</th>
<th>SOP-PURCH-12</th>
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<tr>
<td>SUBJECT:</td>
<td>BUY.IU Request for Contract for Purchasing</td>
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<tr>
<td>SOURCE:</td>
<td>University Procurement Services</td>
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<tr>
<td>ORIGINAL DATE OF ISSUE:</td>
<td>02/20/2019</td>
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<tr>
<td>DATE OF LAST REVISION:</td>
<td>6/17/19</td>
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#### DISCLAIMER:

The information provided in this Standard Operating Procedure (SOP) is designed to provide helpful information on this procedure. Purchasing reserves the right to determine on a case by case basis if a SOP should be adjusted for a particular situation. This SOP is not intended to cover each and every situation nor can it anticipate specific circumstances.

#### RATIONALE:

Department must enter a Contract Request in BUY.IU in order for Purchasing to create or review a contract from the department.

#### PROCEDURES:

There are 3 scenarios covered in this document

1. Department requests Purchasing to create a contract.
2. Department requests Purchasing to review a supplier’s contract.
3. Purchasing requests department to review a contract.

### 1. Department Requests Purchasing to Create a Contract

- In the flyout, click **Contracts**, then **Requests**, and **Request Contract**.
  - Enter a Contract Request Name. Suggested format – “Supplier Name-Department”
  - For “Select a Contract Request Template” select **Purchasing Review Office Contract**.
  - Click **Submit**.

- Instructions – Read notes and click **Next**.
- Details – Click **Next**.
- Attachments – If there is a contract document, attach it here. Click **Next**.
- Questions / Overview – Click **Next**.
- Questions – General Contract Information – Respond to all questions.
  - **Tips:**
    - For Contract Name, use the same name assigned to the Contract Request Name.
    - **Write down the Contract Name and the Form Number!**
    - Department Name – Department
    - Second Party – This is the supplier.
    - Start typing the supplier’s name in the text box:
      - If the name populates in the drop-down, click on the supplier’s name.
• If the supplier name does NOT populate in the drop-down, do NOT click “Request New Supplier”. Go to the next entry “Second Party Name (if not found when searching)”. Manually enter supplier.
  ▪ “Additional Second Party” is only to be used in the (extremely rare) instance when we are entering into a three party contract. If there is a third party, follow the instructions for second party above.
  ▪ Based on response to questions on the previous screen, the next screen will be either Professional Services, Goods, or Performer / Speaker / Artist.
    o Click Next
    o Complete all questions.
    o Click Next.
• Questions – Contract Work – Respond to all questions.
• Click Next.
• Questions – Purchasing – Respond to all questions.
  o Tip:
    ▪ “Name and email address of individual in the department with a business need to view the final contract” – This will generally be the department Fiscal Officer, who will need to see the contract to approve the Requisition.
    o Click Next.
• Review and Complete -
  o If all boxes listed under “Section” are checked green, click Complete Request.
  o If one of the lines listed under “Section” does not have a green check, click on the line for the section and complete the questions in that section.
• “Are you sure you are ready to complete your new contract request?”
  o Click Yes.
• In the contracts flyout / Requests / My Contract Requests should show the Contract Name. If not, click on Filter Contract Requests, and click approved box.
• Create Requisition in BUY.IU.
• Add the Contract Name AND Form Number to the Requisition comments.
• Requisition and Contract Request will both route to Purchasing for review.
  o If a contract will require that funds are encumbered, Purchasing will not sign the contract if there is not a Requisition created for the purchase associated with the contract.

2. Department Requests Purchasing to review a Suppliers Contract
• In the flyout, Click Contracts, then Requests, and Request Contract
  o Enter a Contract Request Name. Suggested format – “Supplier Name-Department”.
  o For “Select a Contract Request Template” select “Purchasing Review Office Contract”.
  o Click Submit.
• Instructions – Read notes and click Next.
• Details – Click Next.
• Attachments – if there is a contract document, attach it here. Click Next.
• Questions / Overview – Click Next.
• Questions – General Contract Information – Respond to all questions.
  o Tips:
    ▪ For Contract Name, use the same name assigned to the Contract Request Name.
    ▪ Write down the Contract Name and Form Number!
    ▪ Department Name - Department
• Second Party – This is the supplier.
  • Start typing the supplier’s name in the text box:
    If the name populates in the drop-down, click on the supplier’s name.
  • If the supplier name does NOT populate in the drop-down, do NOT click “Request New Supplier”. Go to the next entry “Second Party Name (if not found when searching)”. Manually enter supplier.
  • “Additional Second Party” is only to be used in the (extremely rare) instance when we are entering into a three party contract. If there is a third party, follow the instructions for second party above.
  • Based on response to questions on the previous screen, the next screen will be either Professional Services, Goods, or Performer / Speaker / Artist.
    o Click Next
    o Complete all questions.
    o Click Next.
• Questions – Contract Work – Respond to all questions.
• Click Next
• Questions – Purchasing – Respond to all questions.
  o Tip:
    • Question: “Name and email address of individual in the department with a business need to view the final contract” – This will generally be the Department Fiscal Officer, who will need to see the contract to approve the Requisition.
    o Click Next.
• Review and Complete -
  o If there is a green check on the line for all of the pages listed under “Section”, click Complete Request.
  o If one of the lines listed under “Section” does not have a green check, click on the line for the section that is not complete and go back to complete the questions in that section.
• “Are you sure you are ready to complete your new contract request?”
  o Click Yes.
• In the contracts flyout / Requests / My Contract Requests should show the Contract Name. If not, click on Filter Contract Requests, and click approved box.
• Create Requisition in BUY.IU.
• Add the Contract Name and Form Number to the comments on the Requisition.
• Requisition and contract will both route to Purchasing for review.
  o If a contract will require that funds are encumbered, Purchasing will not sign the contract if there is not a Requisition created for the purchase associated with the contract.

3. Purchasing Requests Department to Review a Contract
• An email message will come from a Purchasing staff member with a link to the contract in BUY.IU.
• Click the link.
• Review the contract.
  o Go to Attachments to find the contract(s).
  o Go to Review Rounds. Under the section “Tracking” click Check Out. Click Download to view the contract.
If the version attached is in Word, make redline changes or comments as necessary. If the version attached is a .pdf, make changes, save to your desktop and upload the new version to the Attachments.

- When complete, check in the contract by selecting “Check In” in Contract Authoring for Word.
- Go to the Review Rounds Screen.
- On review rounds, click Actions in the Tracking area, and select Done with My Review.
- Enter review comment for Contract Manager, and Done with My Review again.
- The process can be repeated as required between Purchasing and the department.

Note: Logging into Jaggaer Contract Authoring for Word.

- The first time you receive a request, you will need to log into Jaggaer Contract Authoring for Word. Process:
  - At the top of the screen click the down button next to your name.
  - Go to “View My Profile”.
  - In the left column, select “App Activation Codes”.
  - Click Add Microsoft Word 2013 OR click Add Device > Microsoft Word 2013. The Add Device window opens.
  - Enter a unique name for the device in the Device Name field (we recommend using your name and computer, i.e. “Suzy’s computer”).
  - Next to “Email Activation Code to User?” select Yes if you want an email, otherwise select No.
  - Click Add Device. The Add Device window opens and displays the newly created activation code. If you selected “Yes” in the step above, an email containing the activation code will be sent.
  - Activate the code by entering it into the Activation Code field in the Jaggaer Contract Authoring for Word app.
  - The system will maintain the activation code and you should not have to enter it again.
  - The password for Contract Authoring for Word is “indiana”.

| DEFINITIONS: |
| CROSS REFERENCE: |
| - SOP – Request contract from OVPGC in BUY.IU (Coming Soon) |