Contract Requestor Guide

The Contract Request consists of completing some preliminary questions and information and attaching supporting documents and/or a supplier contract. Once submitted, the Contract Request will be forwarded to the Contracts Team for review and approval. They will review the request, approve or reject the request, create the contract record, submit the contract to the appropriate parties for review & approval, and send the contract for e-signature.

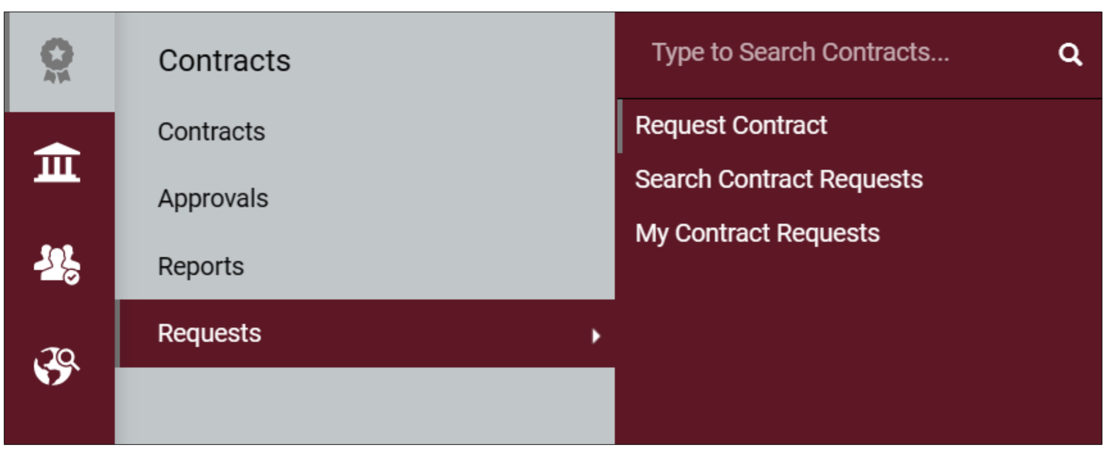
HELPFUL HINTS

Based on the selections you make in certain contract request fields, other fields may or may not be visible. Some contract request fields may contain help text indicated by this icon ❓.

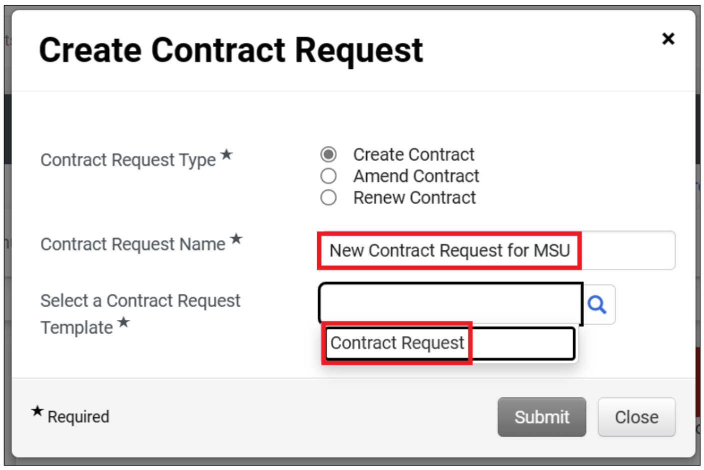
CREATE CONTRACT REQUEST FORM

After a contract request is submitted and approved, the contract request can be transitioned into a contract record, transferring the information collected on the contract request to the contract record.

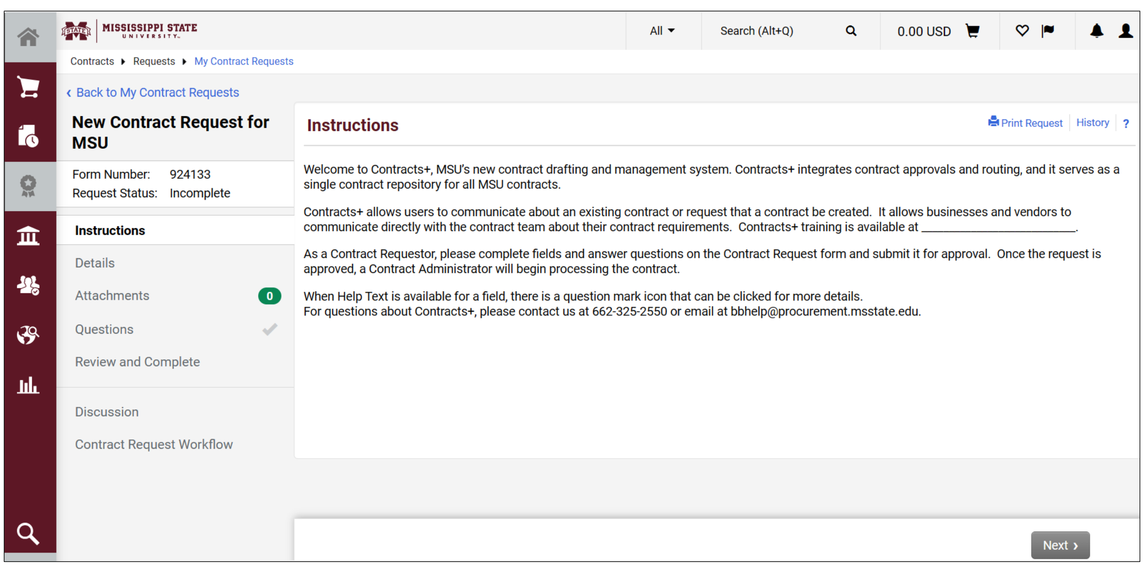
1. Navigate to Contracts > expand “Requests” then select “Request Contract.”



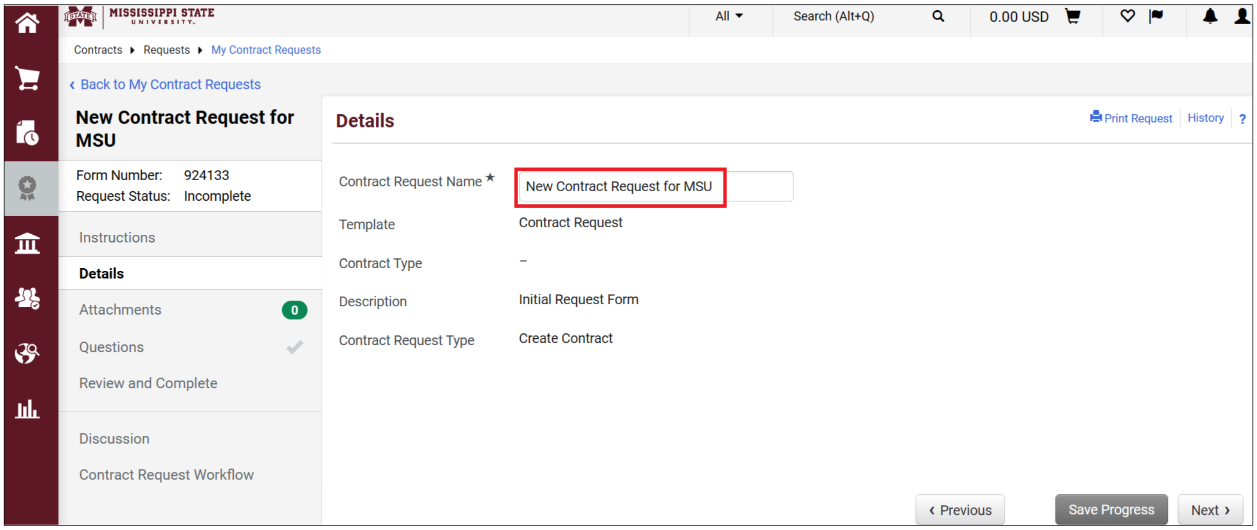
2. In Create Contract Request dialog box, put the name of contract in “Contract Request Name” and there is only one template which will default to “Contract Request” select that, then click on “Submit” button.



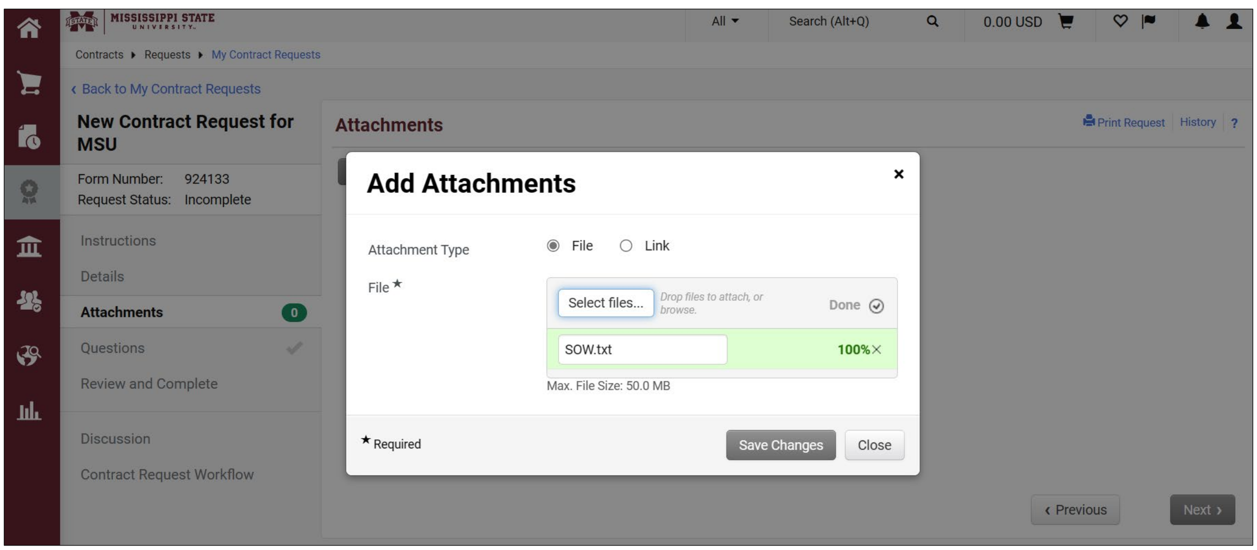
3. Instructions - Please review the instructions for completing the contract request. The information on the instructions page has been provided by the user who created the contract request template.



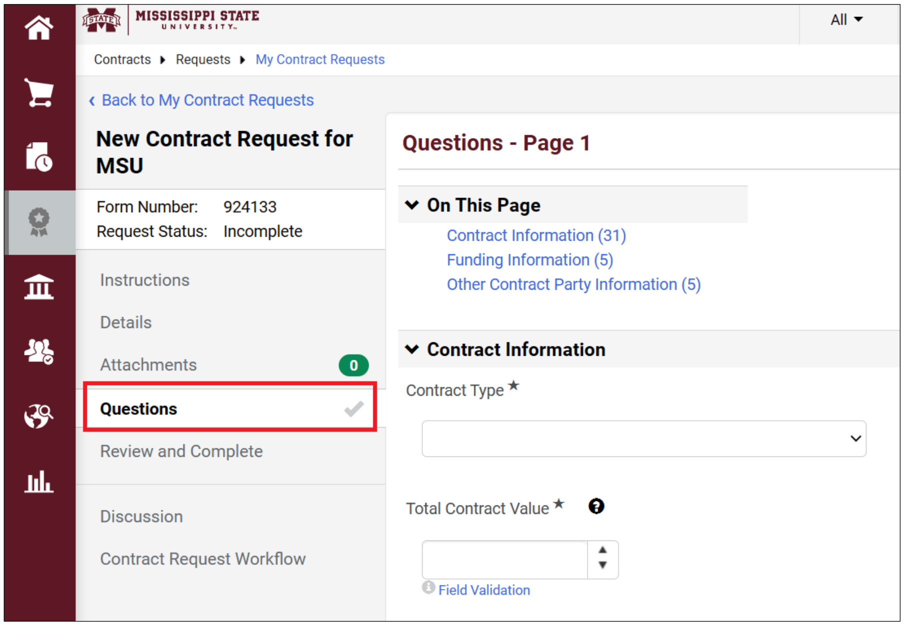
4. Details - The details page allows the requester to provide or change a contract request name. Information is also provided about the Request Template, Contract Type, Description.



5. Attachments - Click on the Attachments tab on the left side of the screen. Attach the proposed contract to the request, and any other preliminary forms or information that should be submitted, by clicking Add Attachments, then select files to upload and click Save Changes.

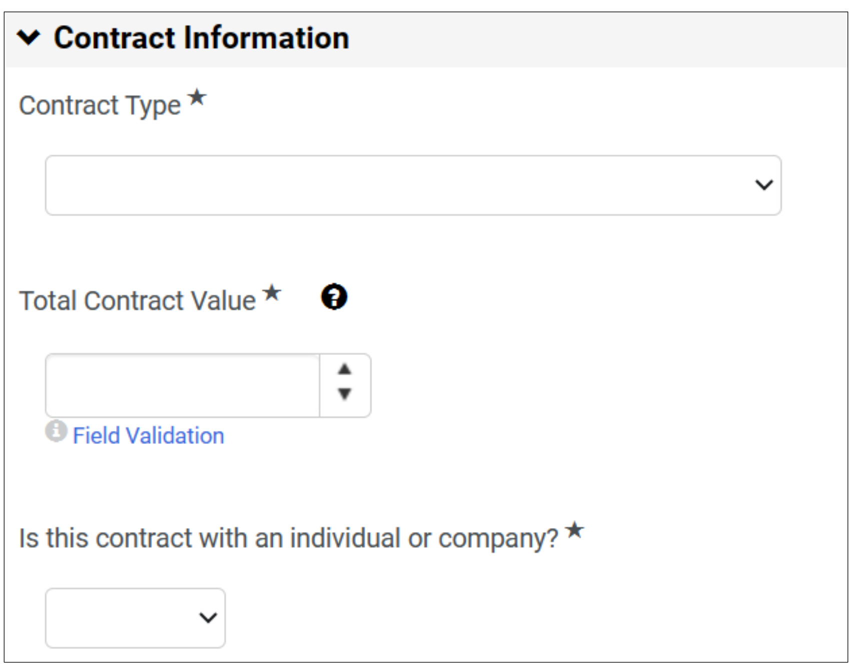


6. Questions - The Questions page contains questions that must be answered to complete the contract request. Every question with an Asterix (*) next to it is required. Complete the required questions.

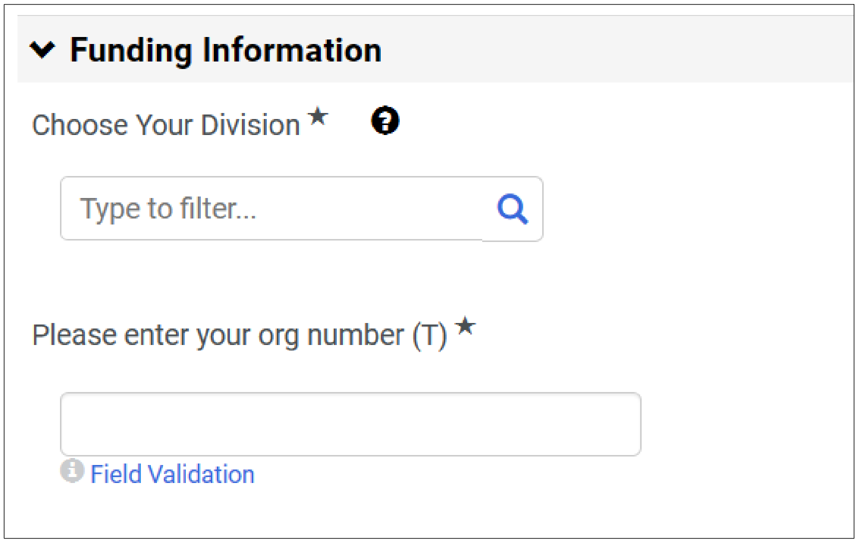


7. Complete below sections by answering questions-

- Contract Information

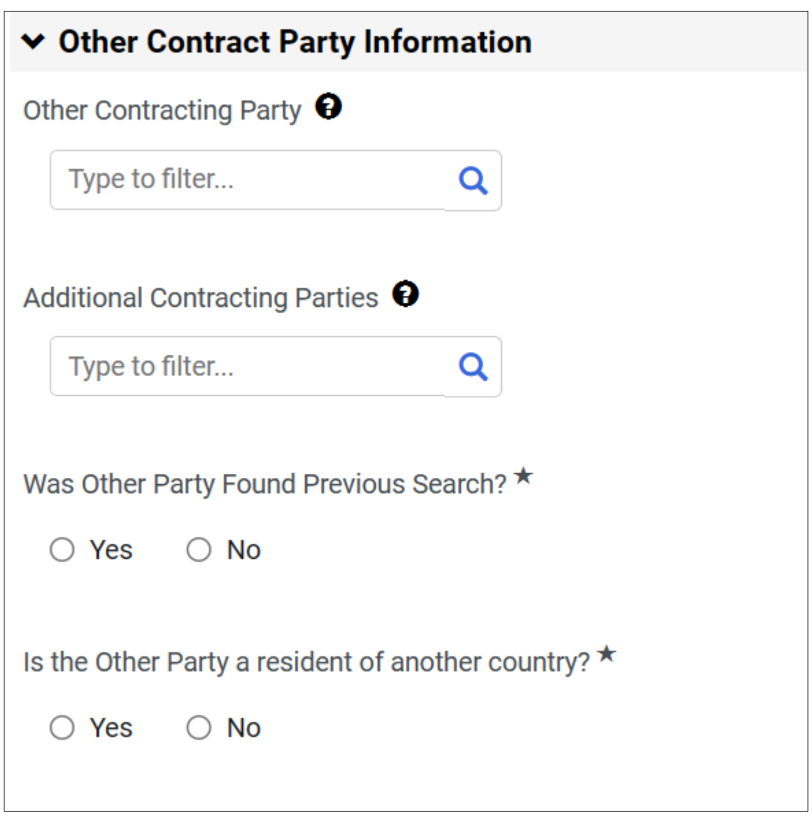


- Funding Information

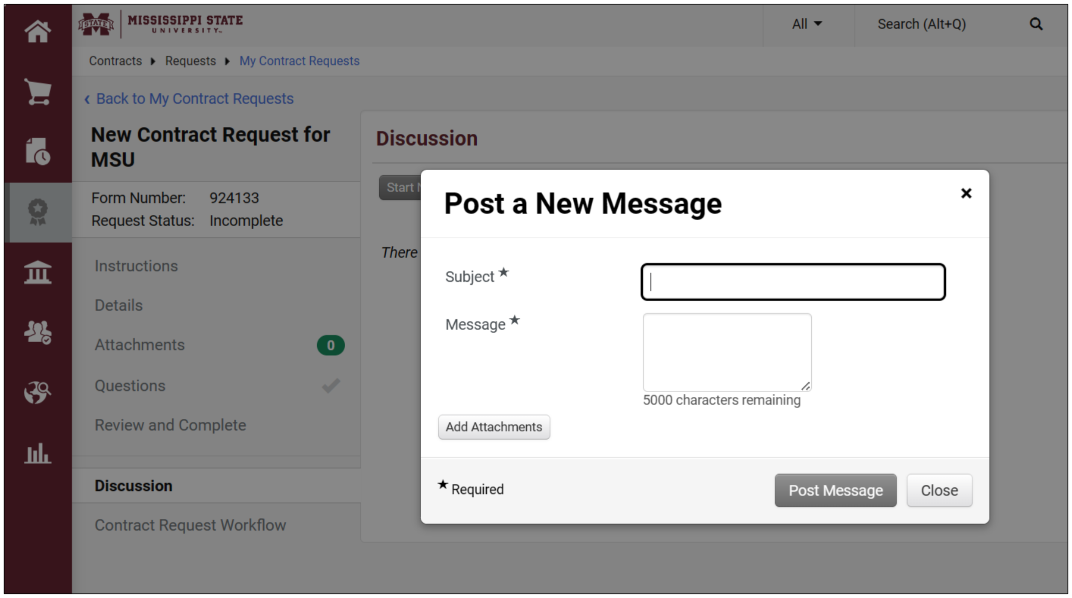


- Other Contract Party Information

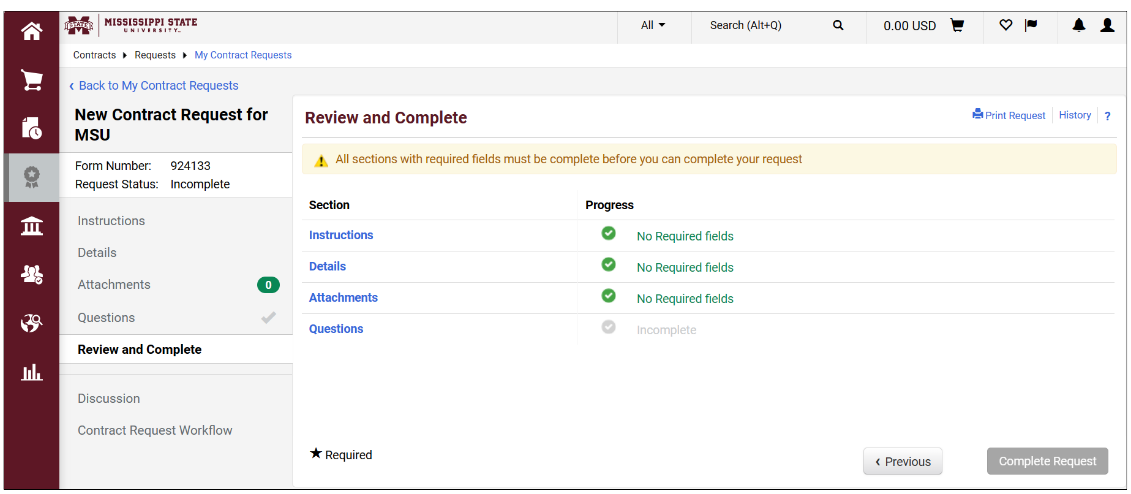
*Note - Other Contracting Party = Supplier



8. Discussions - Click on the Discussions tab on the left side of the screen to add a message to the Contract Team regarding the contract.

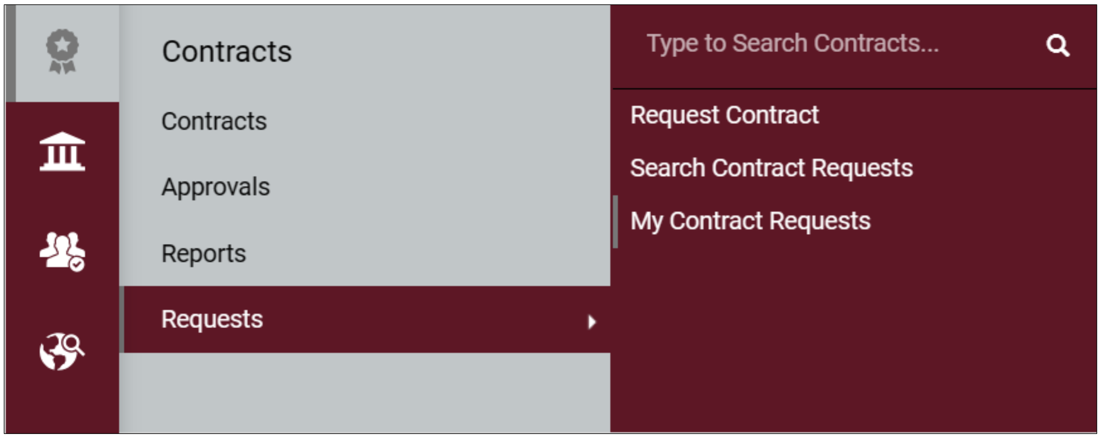


9. Review and Complete - If any of the required Fields (Questions with an asterisk beside them) are not completed, the page will be shown as grey and say Incomplete. Once all required Fields are completed, the Review and Complete page will show green check marks and will say No required Fields or required Fields Complete.

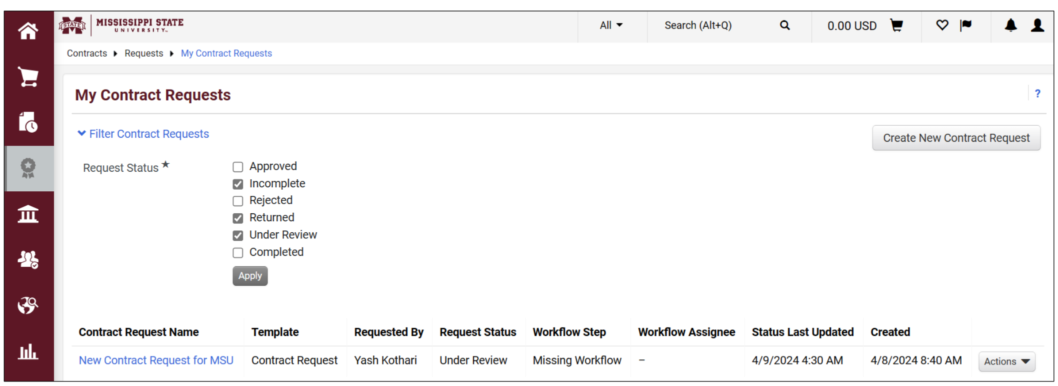


10. Submit Request. Click Complete Request to submit the Contract Request. The Contract Request will be submitted and shown as “Under Review”.

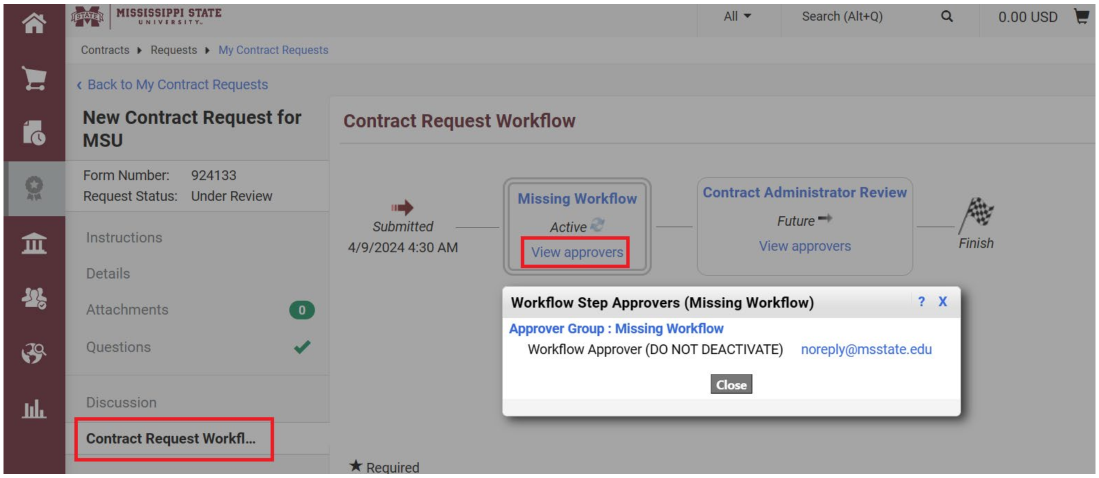
11. Check Status of your Request - After submitting a Contract Request, check the status of your Request from any screen, by clicking Contracts > Requests > My Contract Requests.



a) This will return the list of all Contract Requests you created. Select the request you wish to open by clicking on it. There are filters available to apply and find requests with a particular status-



B) Now go to “Contract Request Workflow” tab from the left panel and there you will be able to see the approval status and can view the approvers for that step by clicking "View approvers".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All
Search (Alt+Q)
0.00 USD
Contracts
Requests
My Contract Requests
Back to My Contract Requests
New Contract Request for MSU
Form Number: 924133
Request Status: Under Review
Instructions
Details
Attachments 0
Questions
Discussion
Contract Request Workfl...
Contract Request Workflow
Submitted
4/9/2024 4:30 AM
Missing Workflow
Active
View approvers
Contract Administrator Review
Future
View approvers
Finish
Workflow Step Approvers (Missing Workflow)
Approver Group : Missing Workflow
Workflow Approver (DO NOT DEACTIVATE) noreply@msstate.edu
Close
Required