Indiana University Office of Procurement Services

STANDARD OPERATING PROCEDURE

SOP NO:	SOP-PURCH-12
SUBJECT:	BUY.IU Contract Request, Review, and Renewal Process
SOURCE:	University Procurement Services
ORIGINAL DATE OF ISSUE:	02/20/2019
DATE OF LAST REVISION:	08/31/2022
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:	To provide instruction on how to request the creation of a contract, review of a contract by Purchasing, or renew/extend a contract within BUY.IU

PROCEDURES:

There are 3 scenarios covered in this document

1. Purchasing requires a Contract. OR department requests Purchasing to create a contract or to review a supplier's contract
2. Purchasing requests department to review a contract.
3. Contract Renewal/Extension - Expiration Notification

1. Purchasing Requires a Contract, OR department Requests Purchasing to Create a Contract or to Review a Supplier's Contract

The supplier must be active and approved in BUY.IU to follow these instructions. Always search for the supplier first.

If the supplier is not available in BUY.IU or the Jaggaer Network, submit a Non-Catalog (Purchase Order) supplier request form and request they be invited to register.

If the supplier record is in BUY.IU but is not active or approved, submit a Supplier Edit Request form and the Supplier Data Management (SDM) team will review the record and advise on next steps.

- Navigate to the Contract module in BUY.IU. Click *Contracts*, then *Requests*, *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!** The Form Number is available in the upper left-hand section of the form.
        - Second Party – This is the supplier.
            - Start typing the supplier's name in the text box. The supplier's name populates in the drop-down. Click it to select it.
            - If the supplier name does NOT populate in the drop-down, click Save Progress to save your work, then "Request New Supplier".
            - You will be prompted to navigate to a new page. Click *Yes*, then select "Non-Catalog (Purchase Order)" from the drop-down list. Complete and submit the form.
            - You will not be able to complete the rest of the Contract Request Form until the supplier has completed the registration process.
        - "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 to add them.
        - "Select Type of Agreement from List" – Options: Services; Goods; Performers/Speakers/Performing Artists; or Internally Funded Research Agreement. Based on response to questions, the next screen will be either Professional Services, Goods, or Performer / Speaker / Artist, or Internally Funded Research Agreement.
        - Start Date: Do NOT use the contract start date. Use CURRENT date here.
    - Click *Next*.
    - Page based on Type of Contract – Respond to all questions.
    - Click *Next*.
- Questions – Contract Work – Respond to all questions.
- Click *Next.*
- Questions – Purchasing – Respond to all questions.
    - Tips:
        - "Effective Contract Start Date" Use the date the agreement starts, NOT the current date.
        - "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.
    - Click *Next.*
- Review and Complete -
    - If all boxes listed under "Section" are checked green, click *Complete Request.*
    - 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?"
    - Click *Yes.*
- In the contracts flyout/Requests/My Contract Requests now shows the Contract Name. If not, click on *Filter Contract Requests, and* check the *approve*d box.
- Create Requisition in BUY.IU.
- Check the box next to "Order Restricted?" in the General section of the Requisition.
- Add the Contract Name and Form Number to the Requisition comments.
- Requisition and Contract Request will both route to Purchasing for review.
    - 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. 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.
    - Go to Attachments to find the document(s).
    - 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 Category Manager and select *Done with My Review* again.
- The process can be repeated as required by 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".

3. Contract Renewal/Extension - Expiration Notification

- Stakeholder will receive an email at 3 months and then 1 month prior to the contract expiration date.
- Stakeholder confirms within their department to see if services will be completed by the end date or if an extension is needed.
- If an extension is needed:
    - Time and no additional funding:
        - Submit a Change Request from the PO updating the PO End date in the Recurring Payments section.
    - Time and additional funding:
        - Fiscal Officer must add a comment to the Purchase Order indicating the new end date and authorizing the addition of $xxx to the Agreement. Tag the Category Manager in your Comment for notification.
        - Purchasing will prepare an Amendment to Agreement and send to supplier for signature.

	▪ After the signed Amendment is received, Purchasing will email the Department to submit a Change Request from the PO to update the PO End date in the Recurring Payments section and add the additional funds.
DEFINITIONS:	
CROSS REFERENCE:	Searching for Suppliers in BUY.IU guide Non-Catalog (Purchase Order) Supplier Request form guide Office of the Vice President & General Counsel BUY.IU Information page