



Drexel University P2P Transformation

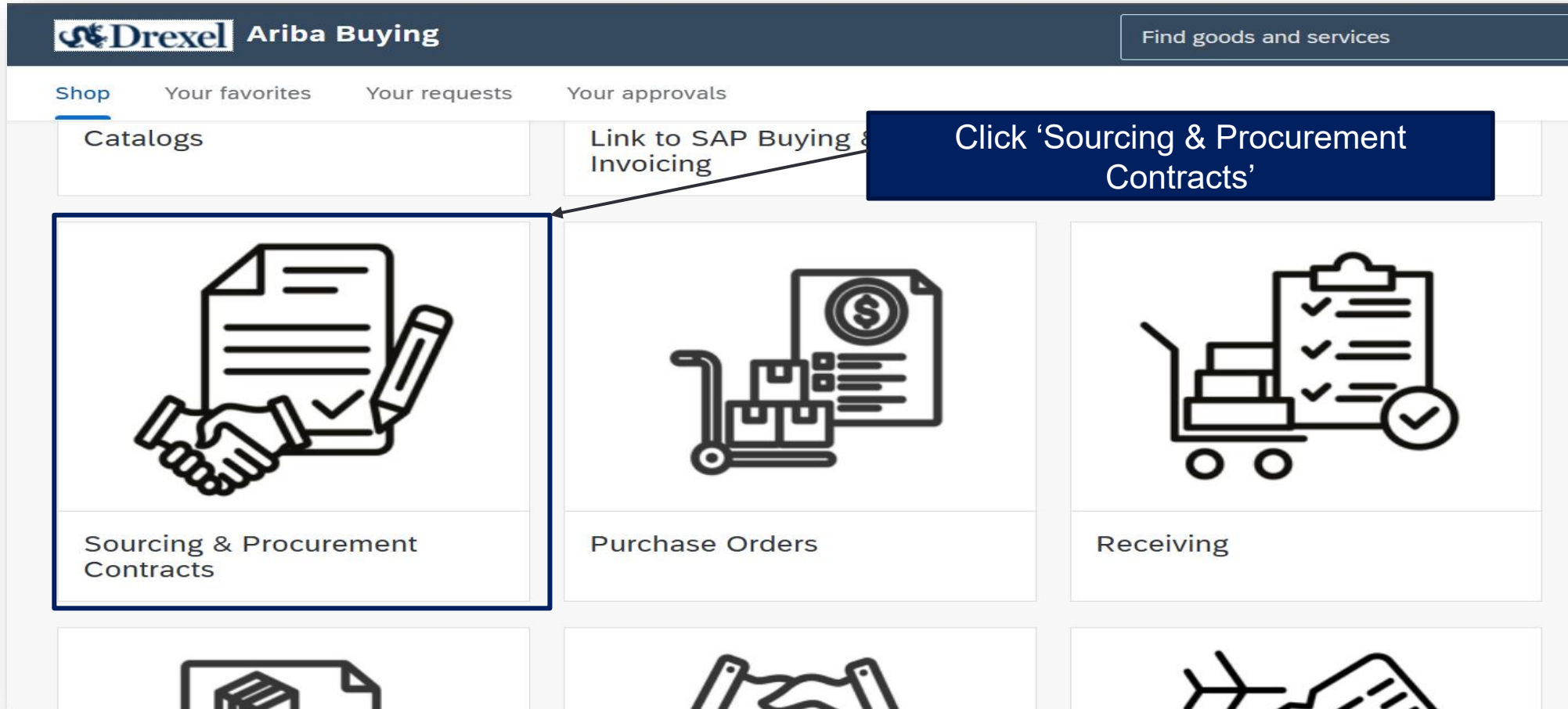
Create Contract Request

Important: Points to be considered when creating a Contract Request

- **REMINDER: Department-level requesters may not sign contracts on Drexel's behalf.**
- Drexel has a set of standard purchasing contract terms and conditions that suffice to guide contracting processes much of the time, but sometimes alternative contracting language is established as a result of negotiation between suppliers and Drexel.
- Once you have identified a supplier who can fulfill your purchasing needs, contact Sourcing@drexel.edu with the supplier's proposal, price quote, and/or scope of work to confirm the correct template to use.
- The Contract Request is the starting point to initiate the contract review process and is to be submitted by the purchase requester (also known as the business stakeholder) for the scenarios below:
 - A supplier has made changes/redlines to a Drexel contract template
 - A supplier is requesting that we contract using their contract template
 - All off-site event contracts
- If an amendment is required to an existing contract, a new Contract Request must also be initiated by business requester.
- The Supplier Information Form must be completed by the business requester for a Contract Request involving a new supplier or if the agreement has not yet been signed.

Access Contract Request- Guided Buying

- Login to Ariba Buying and Click the 'Sourcing & Procurement Contracts' tile.



Access Contract Request- Guided Buying


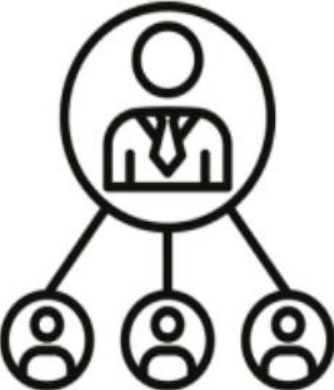




- Scroll down to Contracts and click on 'Submit Contract Request'

The screenshot displays the Ariba Buying interface. At the top, the Drexel logo and 'Ariba Buying' are visible on the left, and a search bar with the text 'Find goods and services' is on the right. Below this, a breadcrumb trail shows 'Sourcing & Procurement Contracts'. The main content area is titled 'Contracts' and contains four cards. The first card, 'Submit Contract Request', is highlighted with a blue border and a callout box pointing to it with the text 'Click 'Submit Contract Request''. The other cards are 'List of Master Agreements', 'Link to SAP Contracts', and 'Non-PO invoice form'. The 'Non-PO invoice form' card shows the text 'LESAPRASA 86130000' and a location icon.

Access Contract Request- Buying & Invoicing

- Alternatively, access a contract request via B&I

The image shows a grid of six icons representing different business processes. The 'Link to SAP Buying & Invoicing' icon is highlighted with a blue border and a callout box. The callout box contains the text: 'Click 'Link to SAP Buying & invoicing''.

 <p>Catalogs</p>	 <p>Link to SAP Buying & Invoicing</p>	 <p>Requisition & Approvals</p>
		

Access Contract Request- Buying & Invoicing

The screenshot shows a procurement system interface with the following elements:

- Navigation Bar:** HOME, SOURCING, CONTRACTS, and a partially visible 'P'.
- Search Bar:** 'Contract Workspace (Procurement)' with a search prompt: 'Search using Title, ID, or any other term'.
- Left Sidebar (Common Actions):**
 - Create
 - Contract Workspace (Procurement)
 - Contract Request (Procurement)
 - Analytical Report
 - Quick Survey
 - More
 - Manage
 - Public Reports
 - Core Administration
 - SM Admin
 - More
- Main Content Area:**
 - Event Status:** A donut chart showing 13 items in total, with 2 in Draft, 19 in Open, and 13 in Completed.
 - My Tasks:** A bar chart showing 19 Overdue tasks.
 - Expired 30 Days:** A box indicating 0 items.
 - News:** A message stating 'Company news content has not been configured by your system administrator.'
 - My Documents:** A table with columns for Title, Date, and Status.
 - To Do:** A table with columns for Date, Status, and Title.
- Annotations:**
 - 1:** A callout box pointing to the 'Create' button in the top right corner.
 - 2:** A callout box pointing to the 'Contract Request (Procurement)' option in the dropdown menu.

Create Contract Request

Create Contract Request (Procurement)

To create a Procurement Contract Request, specify the fields below. Templates used for constructing your Procurement Contract

Name: * Acme Industries-Promotional supplies for fall recruitment

Description:

Promotion supplies for fall recruitment AY 27-28

Company name: Acme Industries

Contact name: Jane Doe

Contact email: Jane.Doe@acmeind.com

Copy from Contract: (no value)

Test Project: * Yes No

Contract Type: * No Choice

Agreement Date:

3

Enter a clear request name
(Supplier Name – Contract Detail)

4

Summarize purpose and scope of
goods/services

If using a new supplier, include
company name, contact and email

If contract is unsigned, include the
signatory contact's name and email

Create Contract Request

Copy from Contract: (no value)

Test Project: * Yes No

Contract Type: *

Supplier: *

Affected Parties: (no value)

Current Contract Amount: * USD

Commodity: * (no value)

Departments: * (no value)

Predecessor Project: (no value)

Are these goods and/or services being paid for in whole or part with grant proceeds or sponsored research funds? * Yes No

Address where goods will be delivered and/or services performed or event will be held?

Agreement Date:

Term Type: * Fixed

Expiration Date: * 03/31/2027

5 Select the type of Contract

6 Select the Supplier

7 Enter the Contract Amount

i If the contract request is for a Master Agreement, enter \$0 in the Current Contract Amount field

Create Contract Request

Contract Type: * No Choice

Supplier: * (no value) ⓘ

Affected Parties: (no value) ⓘ

Current Contract Amount: * USD ⓘ

Commodity: * (no value) ⓘ

Departments: * (no value) ⓘ

Predecessor Project: (no value)

Agreement Date: ⓘ

Term Type: * Fixed ⓘ

Effective Date: * ⓘ

Expiration Date: * ⓘ

Event Date (If Applicable): ⓘ

Are these goods and/or services being paid for in whole or part with grant proceeds or sponsored research funds? Yes No

Address where goods will be delivered and/or services performed or event will be held?

8

Select the Commodity

9

Select the Department

10

Answer the research fund question



Enter address only for an off-campus delivery or event

Select a template

Select the template you want to use, and answer any questions related to it to create your project. How you set the fields

Drexel University Contract Request Template

Create Contract Request

Contract Type: * No Choice 11

Supplier: * (no value) i

Affected Parties: (no value) i

Current Contract Amount: * USD i

Commodity: * (no value) i

Departments: * (no value) i

Predecessor Project: (no value)

Are these goods and/or services being paid for in whole or part with grant proceeds or sponsored research funds? Yes No

Address where goods will be delivered and/or services performed or event will be held?

Agreement Date: i

Term Type: * Fixed i

Effective Date: * i

Expiration Date: * i

Event Date (If Applicable): i

11 Enter the Effective Date (date contract starts)

12 Enter the Expiration Date (date contract ends)

13 Enter the Event Date (If applicable)

Select a template

Select the template you want to use, and answer any questions related to it to create your project. How you set the fields in the section above might affect which templates are available.

Drexel University Contract Request Template

Create Contract Request

Select a template

Select the template you want to use, and answer any questions related to it to create your project. How you set the fields in the section above might affect which templates are available.

Drexel University Contract Request Template

Drexel University Contract Request Template



Only shown for new suppliers.
Enter supplier details in the Description field above.

Have you entered the supplier's company name, contact name, and contact email address for the new supplier registration email in the description text box above?

Has the agreement already been signed by the supplier?

Have you entered the signatory's contact name and email address into the description text box above?

14

Answer 'Yes' or 'No'
to each question

Yes

No

Yes



Only shown if the agreement is not signed.
Enter signatory contact details in the Description field above.

Create Contract Request

15

Answer 'Yes' or 'No' to each question

Is the supplier a current or recent former student or employee (within the current or previous calendar year) of Drexel University, its subsidiaries and/or affiliates?

No ▾

If your supplier is an individual or a single-member LLC, have they been approved as an independent contractor through the Tax Department?

Does not apply ▾

Is this a request to amend an active contract? If so, please provide the related contract workspace ID in the description field above or attach the existing contract under "Documents"

No ▾

Does your request involve the purchase of software?

No ▾

Does this request involve PII (personally identifying information) or PHI (protected health information)?

No ▾

Is this a Drexel event, program or activity that will involve minors?

No, does not involve minors ▾

16

Click 'Create' button to generate the Contract Request

Create

Cancel

Create Contract Request

17

Navigate to 'Tasks'

Tasks: Incomplete Tasks: 4

Contract Request (Procurement)

Overview Documents **Tasks** Team Message Board History

Show: (Any Status) Required/Optional (Any Owner)

18

Select dropdown for 'Provide Requirements, Supporting Documentation'

Acme Industries-Promotional supplies for...

Name	Document	Owner	Status	Due Date
Provide Requirements, Supporting Documentation *		Project Owner	Not Started	
Confirm supplier contact information has been entered into the Contract Request Description Field *		Project Owner	Not Started	
Approve Contract Request *	Acme Industries-Promotional supplies for fall recruitment	Project Owner	Not Started	
Create Contract Workspace *	Contract Workspace	Contract Manager	Not Started	
Close Contract Request		Contract Manager	Not Started	



Examples of [Supporting Documentation](#) include: draft contract, COI, recent agreements/amendments with supplier, TPRM results, etc.

** indicates required task*



Create Contract Request

Contract Request (Procurement)

tasks: incomplete tasks: 3

Overview

Documents

Tasks

Team

Message Board

History

Show:

(Any Status) ▾

Required/Optional ▾

(Any Owner) ▾

Acme Industries-Promotional supplies for...

Actions ▾



Name	Document	Owner	Status	Due Date
Provide Requirements, Supporting Documentation * ▾		Project Owner	Not Started	
Action	Information has been entered into the Contract	Project Owner	Not Started	
View Task Details				
Edit Task				
Mark Started	Acme Industries-Promotional supplies for fall recruitment ▾	Project Owner	Not Started	
Mark Complete	Contract Workspace ▾	Contract Manager	Not Started	
Associate Document		Contract Manager	Not Started	

19

Select 'Mark Started'

* Indicates required task

Create Contract Request (Continued)

The screenshot shows a web interface for a contract request. At the top, there is a navigation bar with tabs: Overview, Documents, Tasks, Team, Message Board, and History. The 'Documents' tab is highlighted with a blue box and an arrow pointing to a callout box labeled '20' with the text 'Navigate to 'Documents' section'. Below the navigation bar, the main content area displays 'Test Contract Request 24-09'. To the right of this title are links for 'Show Details' and 'Actions', with the 'Actions' link highlighted by a blue box and an arrow pointing to a callout box labeled '21' with the text 'Click 'Actions''. Below the title and links is a table with columns for Name, Owner, and Status. The table contains one row with the following data: Name: Contract Workspace (with a dropdown arrow), Owner: Contract Manager, Status: Not Created.

Contract Request (Procurement)

Overview Documents Tasks Team Message Board History

Test Contract Request 24-09 Show Details Actions

Name	Owner	Status
Contract Workspace ▾	Contract Manager	Not Created

Create Contract Request

Test Contract Request 24-09

Contract Request (Procurement)

22 Select 'Document' under 'Upload'

Overview Documents Tasks Team Message Board History

Test Contract Request 24-09 [Show Details](#)

Name	Owner	Status
Contract Workspace ▾	Contract Manager	Not Crea

- Search
- Upload
- Document
- Create
 - Folder
 - Assembled PDF
 - Analytical Report
 - Compound Report
 - Document
 - Main Agreement
 - Contract Addendum
 - URL
 - Form
 - Shortcut
 - Shortcut Here
 - Subproject
 - Savings Form
- Download
- Documents

Drexel University-TEST | C55_UI4

Terms

© 1996

Create Contract Request

23 Click 'Choose File'

24 Choose the supporting document(s) from your desktop and click 'Open'

Create Document

Upload the file and fill in additional information.

Test Contract Request 24-09 / Untitled Document

Upload file: **Choose File** No file chosen

Or drop file here

Description:

Base Language: English

Use As: None

Is Publish Required: Yes No

Name	Date modified
Yesterday (3)	
Contract Supporting Documentation	10/1/2024 4:47 PM
QRG- Ad hoc Review	10/1/2024 4:16 PM
IC Agreement OGC FINAL 63024 fillable	10/1/2024 4:01 PM
9/27/2024 8:32 AM	
9/25/2024 2:48 PM	
9/25/2024 2:41 PM	
9/25/2024 2:37 PM	
9/25/2024 2:04 PM	
9/24/2024 10:53 AM	

File name: Contract Supporting Documentation

All files

Upload from mobile **Open** Cancel



Multiple documents can be uploaded

Create Contract Request

25

Once uploaded, Click 'Create' button

Create Document


Upload the file and fill in additional information.

Test Contract Request 24-09 / Untitled Document

Upload file: Contract Su...entation.pdf

Or drop file here


Description:




Base Language:

Use As:

Is Publish Required: Yes No

Announce the creation of this new document. 

Unzip contents to project. 

Create Contract Request

26

Click 'Done' to return

Done

Document

 Contract Supportin...

Drag and drop file to replace

Status: Draft

Version: v1

ID: Doc1298816544


Contract Supporting Documentation

Listed below are the details of this Document, including tasks associated with it. You can **Edit** the overview, **Copy** or **Move** the Document, and **Publish** it [More](#)

[Test Contract Request 24-09](#) / [Contract Supporting Documentation](#)

[Overview](#)


[Version History](#)

 [Download](#)

 [Upload](#)

Properties

[Actions](#) ▼


Description: 

Last Modified: 10/01/2024

Status: Draft 

Creation Date: 10/01/2024

Version: v1

Access Control: (No additional restrictions) 

Version Comment: Original Version

Is Publish Required: No

Owner: [Ashley Gaston](#) 

Editors:

Use As: None

Base Language: English

Create Contract Request

Contract Request (Procurement)

tasks: incomplete tasks: 3

Overview

Documents

Tasks

Team

Message Board

History

Show:

(Any Status) ▾

Required/Optional ▾

(Any Owner) ▾

Acme Industries-Promotional supplies for...

Actions ▾



Name	Document	Owner	Status	Due Date
Provide Requirements, Supporting Documentation * ▾		Project Owner	Not Started	
Action	Information has been entered into the Contract	Project Owner	Not Started	
View Task Details				
Edit Task				
Mark Started				
Mark Complete	Acme Industries-Promotional supplies for fall recruitment ▾	Project Owner	Not Started	
Associate Document	Contract Workspace ▾	Contract Manager	Not Started	
		Contract Manager	Not Started	

27
Select 'Mark Complete'

* Indicates required task

Create Contract Request

28

Navigate to 'Tasks' section

Tasks: Incomplete Tasks: 4

Overview

Documents

Tasks

Team

Message Board

History

Show: (Any Status) ▾

Required/Optional ▾

(Any Owner) ▾

29

Select drop down for 'Supplier contact' task

Actions ▾



Acme Industries-Promotional supplies for...

Name	Document	Owner	Status	Due Date
Provide Requirements, Supporting Documentation * ▾		Project Owner	Not Started	
Confirm supplier contact information has been entered into the Contract Request Description Field * ▾		Project Owner	Not Started	
Approve Contract Request * ▾	Acme Industries-Promotional supplies for fall recruitment ▾	Project Owner	Not Started	
Create Contract Workspace * ▾	Contract Workspace ▾	Contract Manager	Not Started	
Close Contract Request ▾		Contract Manager	Not Started	

* Indicates required task



This task is only shown for new suppliers

Create Contract Request

Contract Request (Procurement) Tasks: Incomplete Tasks: 4

Overview Documents **Tasks** Team Message Board History

Show: (Any Status) Required/Optional (Any Owner)

Acme Industries-Promotional supplies for... Actions

Name	Document	Owner	Status	Due Date
Provide Requirements, Supporting Documentation *		Project Owner	Not Started	
Confirm supplier contact information has been entered into the Contract Request Description Field *		Project Owner	Not Started	
	Acme Industries-Promotional supplies for fall recruitment	Project Owner	Not Started	
	Contract Workspace	Contract Manager	Not Started	
		Contract Manager	Not Started	

Action

View Task Details

Edit Task

Mark Started

Mark Complete

Associate Document

30

Select 'View Task Details'

** Indicates required task*

Create Contract Request

To Do Task

Exit

Tasks are assigned work to be finished by a given date. If you have not yet started the task, click **Mark Started** to indicate that you are working on it. If this task is finished, you can click **Mark Complete** [More](#)

Acme Industries-Promotional supplies for... / [Confirm supplier contact information has...](#)

TSK2078445740 Confirm supplier contact information has been entered into the Contract Request Description Field

Mark Started

Mark Complete

31

Select 'Mark Complete'

Properties

Comments

Basic Details

Actions

Status: Not Started



Mark complete only after confirming supplier contact details are included in the Description. Missing information may delay processing.

Create Contract Request

Contract Request (Procurement) Tasks: Incomplete Tasks: 4

Overview Documents **Tasks** Team Message Board History

Show: (Any Status) (Required/Optional) (Any Owner)

Acme Industries-Promotional supplies for fall recruitment Actions

Name	Document	Owner	Status	Due Date
Provide Requirements Supporting Documentation *		Project Owner	Not Started	
Confirm supplier contact information has been entered into the Contract Request Description Field *		Project Owner	Not Started	
Approve Contract Request * 	Acme Industries-Promotional supplies for fall recruitment	Project Owner	Not Started	
Create Contract Workspace *	Contract Workspace	Contract Manager	Not Started	
Close Contract Request		Contract Manager	Not Started	


* Indicates required task

32 Click the 'clock' icon for the task 'Approve Contract Request'

Create Contract Request


TSK1297745115 Approve Contract Request

Submit the contract request for approval.


1.  Test Contract Request
24-09 ▾

2. Specify Due Date

Days after parent phase starts: None ⓘ

Fixed Date: 

3. Provide an initial message and click Submit



Additional Attachments...

4.

33

Enter message for approvers, if applicable

34

Click 'Submit' to route for approval