Approving a CRF and Building a Contract – Contract Administrator

This job aid covers how to find and approve a Contract Request Form (CRF), how to create a Contract from a CRF, actions one can take on the processes, and how to check or tie an iBuy Requisition to a Contract.

The Contract Administrator role is required to create a new contract or to amend an existing contract, and you must be assigned as an administrator to the same work group as the contract you are creating.

A New Contract or an Amendment request on a CRF that has been approved at the department level or by specialty approvers will route to the Contract Request Assignment queue for designated Contract Administrators from each Purchasing office.

How to Approve a Contract Request Form (CRF)

1. Notification received that a Contract Request is pending approval.

2. Navigate to Contracts > Approvals > Contract Requests to Approve or from the Action Items (flag icon) at the top, click Contract Request Approvals to view the requests in your assigned queue.

3. Open the Folder.

4. Click the Form Number or Name to open the request.

5. Review the contract request.
   a. If the request is for an expenditure contract (Contract Category – Payable or Hybrid), the user is required to provide a value within the Requisition Number field under the Financial & Purchasing Info section. The submitted requisition should be pending the standard Purchasing iBuy queue after any departmental approval requirements are met.

6. If you have clarifying questions, click the Start New Thread button on the Discussion page to begin a discussion thread on a contract request.
   a. Enter a title for the contract request message in the Subject field.
      i. NOTE: If there is more than one discussion on a contract request, the Subject line for each message is displayed under the Topics heading.
   b. Enter the text of the contract request message in the Message field.
   c. Click the Add Attachments button to add files or links to the contract request message.
      i. NOTE: Individual attachments up to 50MB each are allowed to be uploaded. For more information, go to Adobe Sign transaction limits.
ii. When you add attachments to the contract record, you can indicate whether you would like the attachments to be included in the print order. If they are included in the print order, that means that the attachments will be rolled up into a single .pdf document. This document is what is sent to Adobe to get the signature. If you included the Main Doc 6 MB, Addendum A 3 MB, and Addendum B 4MB documents in the print order, the integration would likely fail because the combined file size would be over the 10 MB size limitation for Adobe.

d. By default, the Sent Notification To field will be prepopulated with the requestors name. You may search and add more users to the message.

e. Click Post Message to display a message on the Discussion page.

f. If needed, you can also click the Edit button to change the text of a contract request message or reply to this thread to respond to a message.

7. Form Request Actions for the assigned Contract Administrator are:

   a. Approve/Complete – use once the request has been reviewed and is ready to be turned into a contract.

   b. Forward To… – pop-up box allowing you to search for another user in the system and pass the request to.

   c. Put Request on Hold – with an option to add a note.

   d. Reject – this disables the request, and the user would have to start over.

   e. Return to Requestor – used to send the Contract request back to the user to make changes and resubmit.

   f. Return to Shared Folder – used to return the contract request back to the original assignment queue, allowing someone else to take ownership of the request.

8. Once you are ready to approve the request, select Approve/Complete from Form Request Actions.

How to Create a Contract from a Contract Request Form (CRF)

1. Open a second window of iBuy Contracts+ by right clicking the University of Illinois System logo on the top left corner of the screen and selecting Open link in new window. Then, search for the Form Number of the CRF you will be creating a contract for.

   a. NOTE: This way you will have easy access to details of the request that may need transferred to the Contract as you create it.

2. From within the approved CRF, click Request Actions from the top right-hand side of the form and select Create Contract.

3. On each field in the Create Contract pop-up, you can start to type the acronym PCM for the list of types or click Search (magnifying glass icon) for possible options.
a. **Contract Name** – This information can be copied from the CRF; however, if the user did not use the proper format required by the Contract Administrator, you may take this opportunity to update the name. This will be the only time you can change this field.

   i. **NOTE:** Please use the following format when creating the Contract Name:
      
      [Contract Category] – [Requesting Unit] – [Other Party Name]

      1. Example: Payable – College of Vet Med – Clean Uniform Company

b. **Contract Type** – You can start to type the acronym PCM for the list of types or click **Search** (magnifying glass icon) for possible options. Contract Types include predetermined fields specific to the type of contract you are creating. Once selected and saved, a Contract Type cannot be changed.

c. **Use Contract Template** – This defaults to **Yes. DO NOT CHANGE;** For **Visibility Settings** leave this set to **Yes.**

   i. Use the default **Visibility Setting Contract Template** that displays for the Contract Type you selected in order to apply the Board of Trustee recommendations for the **Applies To** and the **User and Contact** sections of a contract.

   ![Create Contract interface](image)

   ii. 

e. **Work Group** – This is based on the **College Code** which can be found on the CRF under **Unit Questions.** When found, you can simply type the two letter College Code in the Work Group field. Alternatively, you can search for it by clicking the magnifying glass. It will pull up University of Illinois which you can expand to find the area of the University your PCM office covers. If you expand that section, you will find a listing with the College Codes.

f. **Main Document Template (MDT)** – If applicable, these are used to configure contract text using Jaggaer Contract Authoring for Word app. Refer to the **Using the Jaggaer Word App – Contract Administrators** job aid or contact support. Main Document Template (MDT) saves time by eliminating the need to enter contract information repeatedly. The option to switch some content using clauses and alternative language will be available.

4. Click **NEXT.**
5. This will ask what attachments from the CRF you would like copied to the Contract. After you make selections, click Create Contract.

6. A Contract Number (CN-00000XXX) has been assigned. Refer to the top left corner.

7. Although most fields carry over from the CRF, some do not. Some are also fields specific to the Contract and are not on the CRF. You will need to ensure all required fields, marked as *, are complete and have accurate values. Some of these fields are provided below.

8. Use eSignature for this contract? Select Yes if you plan to use AdobeSign for signatures.

9. Populate the Value field in the Contract Header section with the number in the Amount field in the Financial & Purchasing Information section and ensure they match
   a. NOTE: Although not marked as required, you must complete the Value field in the Contract Header section.

10. Dates and Renewal section
    a. End Date – Verify the End Date time is 11:59 PM.
    b. Leave the Review Date, Review Term, Renewals Remaining and Renewal Term fields empty if they do not apply to the contract.

11. Fiscal Year Spend Approvals – select the correct range.

12. Second Party Legal Structure – select an option from the drop-down menu.

13. Purchasing Contact Information – These fields populate on the Main Document Template but are not required.

14. As you move through the screens, you can tell if you have completed a screen when it shows a green check mark. If it’s not complete, the check mark will be gray. Or, when you get to the final screen, Submit for Approval, it will provide an error message(s). Please complete all required sections to submit this contract and will show you what screens have information missing.

15. On the left side of the screen, are some optional features you can use:
    a. Apply Obligations such as a reminder to collect an insurance certificate, a testing requirement, tiered payment requirement, etc. See job aid Adding an Obligation to a Contract for Contract Administrators.
    b. Process Internal or External Review Rounds.
       i. NOTE: Refer to the Internal Review Rounds – Contract Administrator job aid.
    c. eProcurement Setup (if applicable). Leave blank for now. More information coming soon.
    d. Use Communication Center. – This is used to manage correspondence about a contract and keep in one central location.
16. Review **Main Document Template** (MDT) located within the **Attachments** tab or select **Open Main Document** on the left side of the screen. You may check out the document and make edits, then finalize.

   a. As details from the placeholders are populated off the contract and into the body of the MDT, text can shift in the document and possibly cause hanging sentences or words.

      i. Click **Enable Editing** and open the Jaggaer Word App **Show Taskpane** icon and select **Check Out** at the bottom of the task pane. Note: You will need to install the Jaggaer Word App if you do not have it. Please refer to the job aid *Using the Jaggaer Word App during Contract Review*.

      ii. Click the **Show/Hide button** and adjust the line returns in the sentence/section to fix.

      iii. Once the change is made, click the **Show/Hide button**.

      iv. Once all changes are made, at the bottom of the Jaggaer Word app task pane, select **Check In** to check the document back into Contracts+. A prompt will show up prior to checking in. For versioning purposes, provide details on what adjustments were made when prompted and click **OK**.

      v. Close the file. You do not need to select **Save** at the prompt.

   b. **Contract for Procurement of Supplies and Services** (POSS) Template. If any additional **Exhibit(s)** are selected for use when building the contract, the **Table of Contents** section needs to be updated to reflect the additional exhibit(s).

      i. Click **Enable Editing** and open the Jaggaer Word App **Show Taskpane** icon and select **Check Out** at the bottom of the Task Pane.

      ii. Click on the **Contents box** in the Contract and the **Update Table** will appear.

      iii. Select **Update Entire Table**.

      iv. **Check In** the document. For versioning, provide details on what adjustments were made when prompted and click **OK**.

      v. Close the file. You do not need to select Save at the prompt.

17. Attach any additional supporting documentation.

18. Validate Approval Steps by clicking on **Submit for Approval** tab.

19. Confirm all actions are complete and expand the **View Approval Steps** to ensure the contract is not set to go a Missing queue or Invalid Data. These indicate values are missing and need to be addressed before you submit the contract.

20. Click **Submit for Approval** to send the Contract through the approval process.

   a. **NOTE:** Depending on the contract status (example: Draft), there are additional **Contract Actions** you can take. From the top right corner of the contract creation
form, click **Contract Actions**. There are options to archive the contract, copy the contract, start an external communication and so on.

21. To assign to another Contract Administrator within your office, use **Forward to....** and select that individual.