

Submitting a Contract for Review

This documentation is meant to be used by University departments to (1) submit a contract to the Office of the Vice President & General Counsel (OVPGC) for review and execution or (2) make a request to OVPGC to help draft a contract.

If you are unsure of what contract template to use for your arrangement, please review the contract templates available on OVPGC’s website here: [OVPGC’s forms and templates](#).

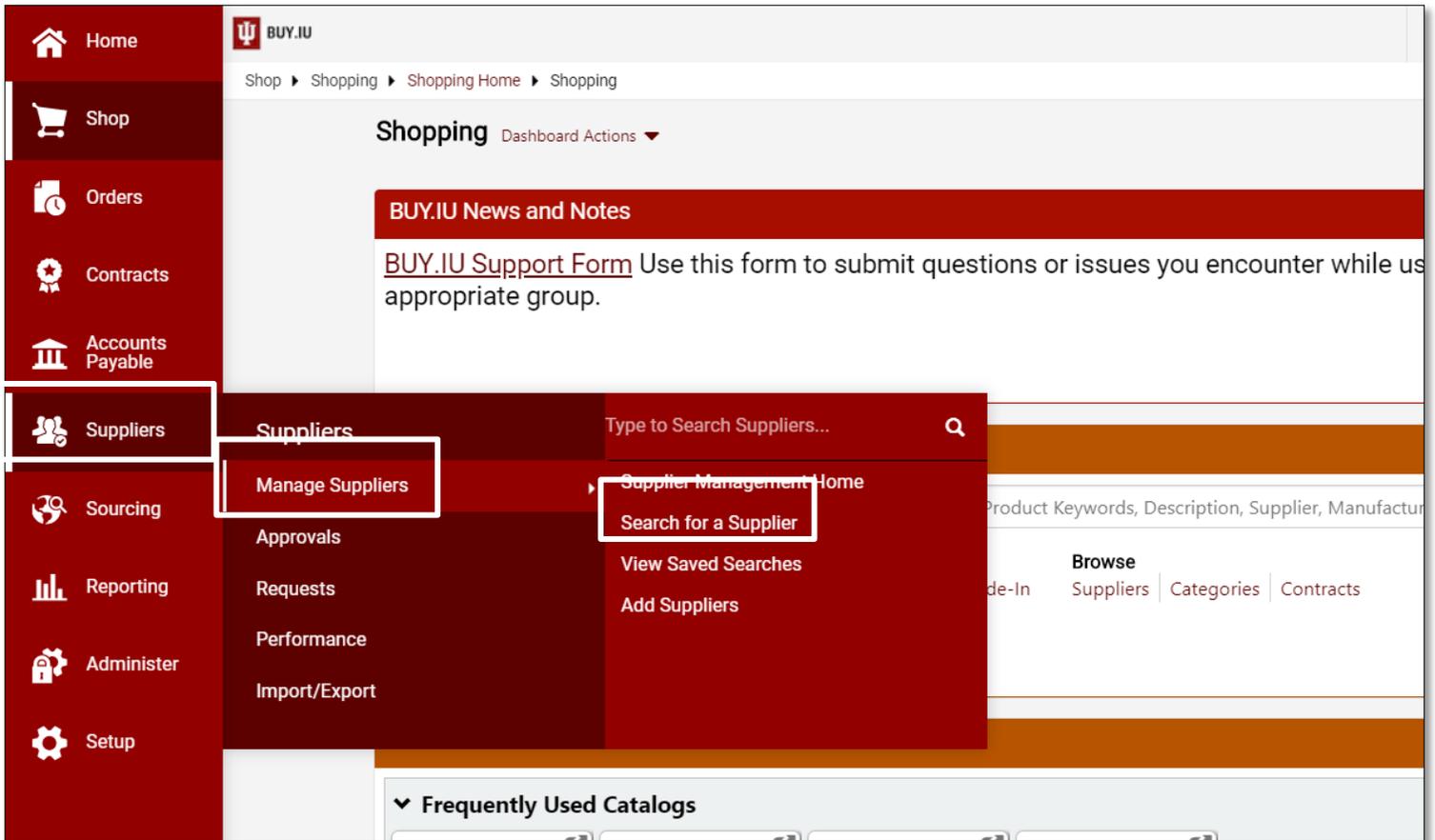
Note: If the arrangement involves the purchase of goods or services, please use the Purchasing Review Office Contract Request Form instead. If the arrangement involves sponsored research, please submit it to the Office of Research Administration (ORA) instead.

Contents

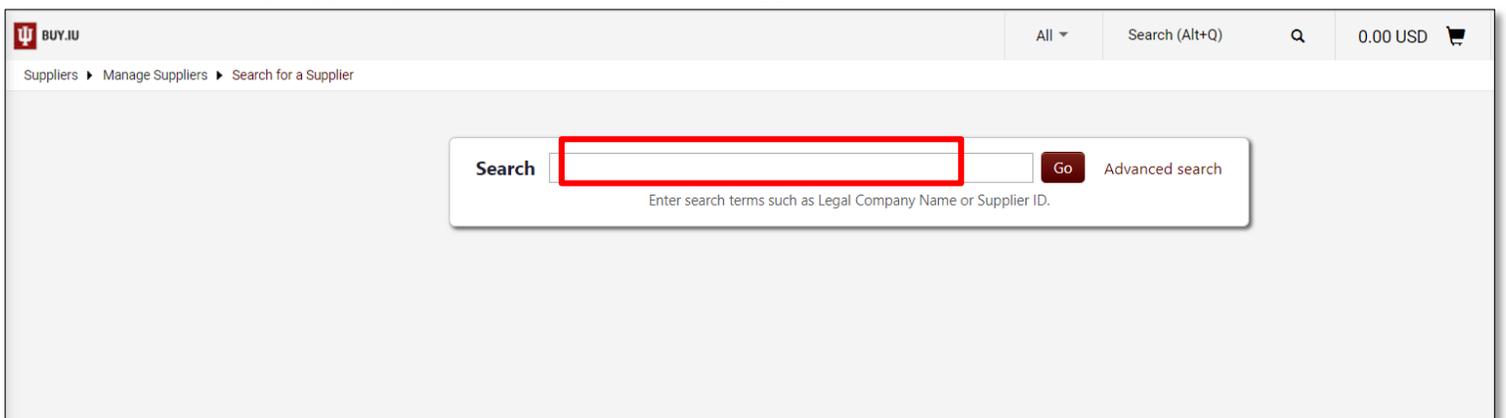
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Search for a Second Party/Supplier

Log in to BUY.IU using your IU Login credentials by visiting <https://buy.iu.edu>. The Search for Suppliers form is located in the **Suppliers** module in the left-hand menu. Navigate to **Manage Suppliers** then select **Search for a Supplier**.



Insert the Second Party/Supplier you wish to search for in the **Supplier** field. Click on **Search**.

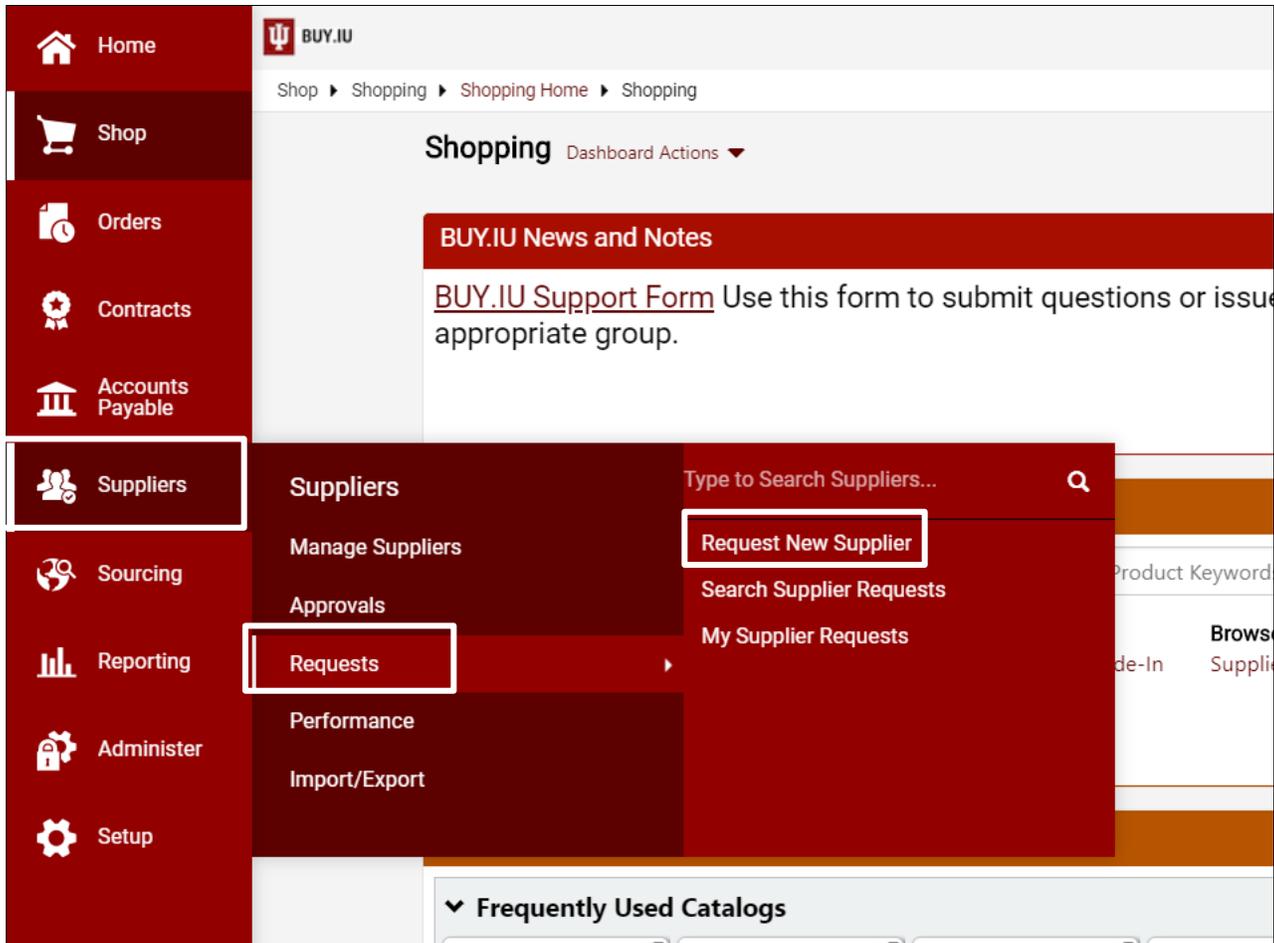


TIP: If you have trouble finding the Supplier click **Advanced search** and be certain the **Relationship** and the **Shopping/AP Status** fields say **All**.

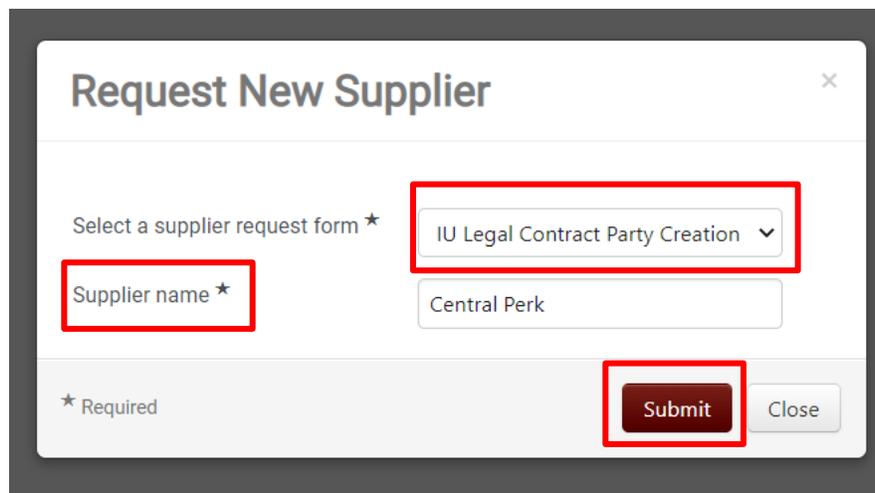
If the correct Second Party/Supplier comes back as a search result, proceed to the **Submit a Contract Request** section of the instructions.

Add a New Second Party/Supplier

If the correct Second Party/Supplier does not come back as a search result, you will need to add them as a new Second Party/Supplier. The Request New Supplier form is located in the **Suppliers** module in the left-hand menu. Navigate to **Requests** then select **Request New Supplier**.



A new window opens. Select the **IU Legal Contract Party Creation Form** and fill out the **Supplier name** field with the Second Party information from the contract. Click **Submit**.



The screenshot shows the 'Request New Supplier' form. The form has a title bar with a close button. The main content area contains the following fields and controls:

- A dropdown menu labeled 'Select a supplier request form *' with the selected option 'IU Legal Contract Party Creation'.
- A text input field labeled 'Supplier name *' with the value 'Central Perk'.
- A 'Submit' button and a 'Close' button.
- A legend indicating that '*' denotes a required field.

The Instructions page will appear. Click **Next**.

Fill out the **Doing Business as (DBA)** field, if applicable. The remaining fields are optional. Click **Save Progress** and then **Next**.

Ensure that all required fields are complete and certify that the statements and information in the request are true and correct to the best of your knowledge and belief. Click on **Complete Request**.

Section	Progress
Instructions	✓ No Required fields
Questions	✓ Required fields complete

I certify that the statements and information in this request are true and correct to the best of my knowledge and belief.

★ Required

[← Previous](#) [Complete Request](#)

A new window opens. Complete the new supplier request.

Confirm

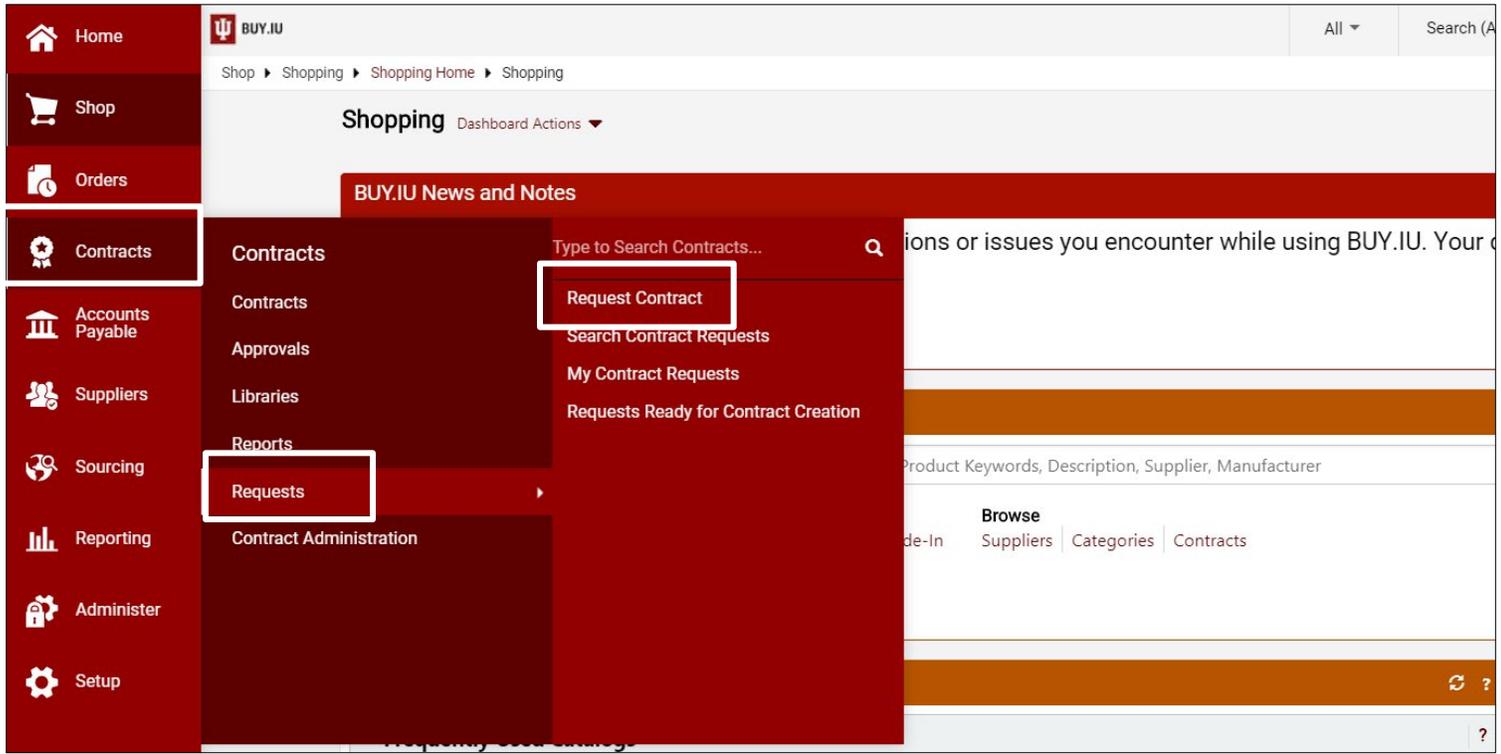
Are you sure are ready to complete your new supplier request?

[Yes](#) [No](#)

Your request is automatically approved and the second party is now ready to use on the Contract Request Form. You can now proceed with submitting a contract for review.

Submit a Contract Request

Log in to BUY.IU using your IU Login credentials by visiting <https://buy.iu.edu>. The Contract Request Form is located in the **Contracts** module located in the left-hand menu. Navigate to **Requests** then select **Request Contract**.

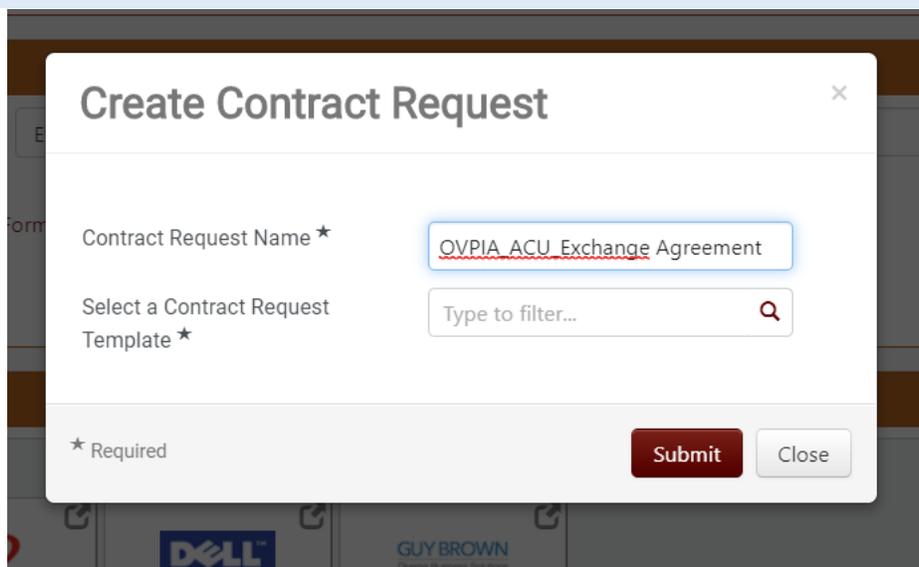


A new window opens. Enter the name of the contract request in the **Contract Request Name** field using the following naming convention:

Your IU organization's abbreviation_the second party's name or initials_the type of agreement

[i.e., the requesting IU department (e.g., OVPIA); underscore; name of other party or parties to the contract or their initials; underscore; the type of agreement, if known (e.g., NDA, Services Agmt, etc.)].

If the agreement is a **"RUSH,"** you may add this to the name and/or contact our office by phone or email.


 A screenshot of the 'Create Contract Request' form. The form has a title bar with a close button (X). It contains two main input fields: 'Contract Request Name' and 'Select a Contract Request Template'. The 'Contract Request Name' field is filled with the text 'OVPIA_ACU_Exchange Agreement' and is highlighted with a blue border. Below it, the 'Select a Contract Request Template' field is empty and has a search icon. At the bottom of the form, there is a legend indicating that an asterisk (*) denotes a required field. There are two buttons at the bottom right: 'Submit' and 'Close'.

For example, the contract titled OVPIA_ACU_Exchange Agmt, used in this example, represents an Exchange Agreement requested by the Office of the Vice President for International Affairs (OVPIA), involving Australian Catholic University (ACU).

Next, choose **Contract Request for General Counsel's Office (OVPGC)** in the **Select a Contract Request Template** field and click **Submit** to access the form.

Create Contract Request

Contract Request Name *

Select a Contract Request Template *

* Required

Submit

Instructions

Review the Instructions and click **Next** to proceed.

< Back to My Contract Requests

OVPIA_ACU_Exchange Agreement

Form Number: 3026341
Request Status: Incomplete

Instructions

Details
Attachments 0
Questions
Review and Complete
Discussion
Contract Request Workflow

Instructions Print Request | History | ?

If you already have a draft contract for review (either an approved template or one the counterparty provided):

- Add it to this Contract Request form by uploading it in the Attachments section.
- Please provide the contract as a Word document, if possible.

If you do not have a draft contract for review:

- Please visit our website at <https://vpgc.iu.edu/forms/index.html> to see if one of our approved templates can be used for the proposed arrangement.
- If one of the templates can be used, please fill it out and then complete this Contract Request form using the instructions above.

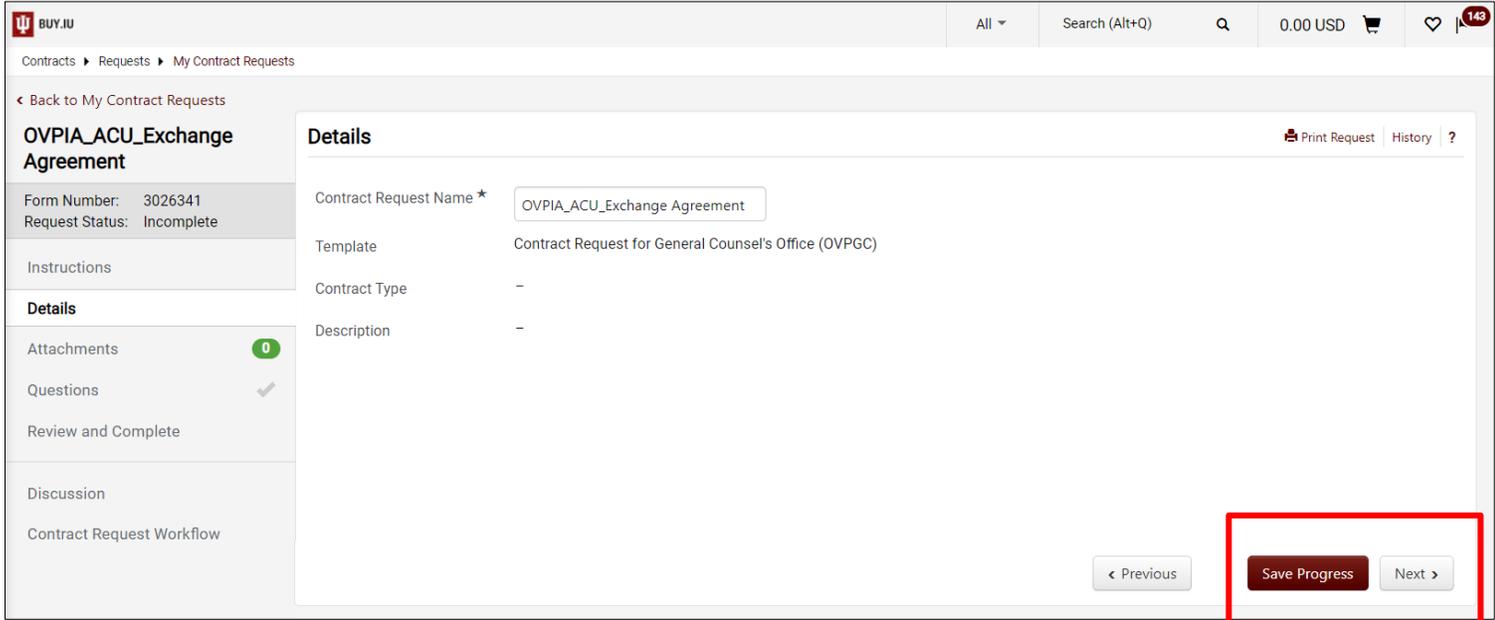
If you cannot find a template on the OVPGC website that fits your arrangement:

- Please continue to complete this Contract Request form but do not upload a document in the Attachments section.
- Please provide as much detail as possible regarding the arrangement in the "Additional Information" section.
- Someone will be in contact with you to determine how to proceed.

Next >

Details

The Details page allows you to update the contract request name, if desired. Click **Next**.

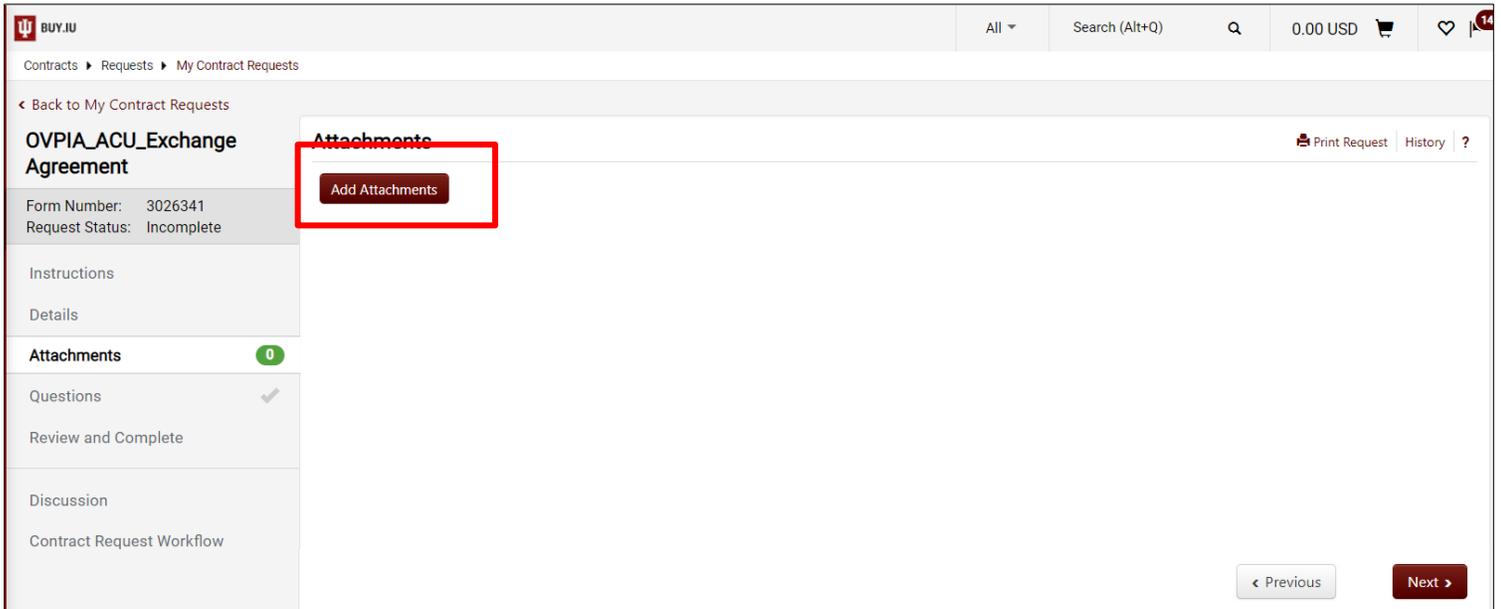


Attachments

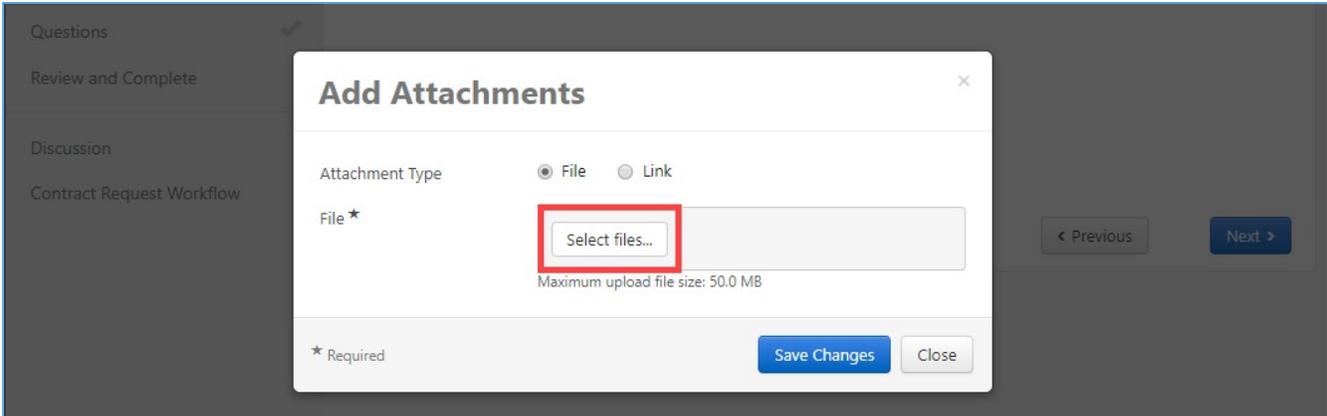
On the Attachments page, upload a completed IU contract template or second party-provided contract (as a Word document in docx. format). Upload any appendices or exhibits referenced in the contract if not already included in the contract document itself and any additional background documents that may be useful to the attorney or paralegal reviewing the contract. If assistance is needed to create a contract and no helpful background documents can be uploaded, then no attachment needs to be uploaded.

Note: Please upload the contract as a WORD (.docx) document with changes tracked.

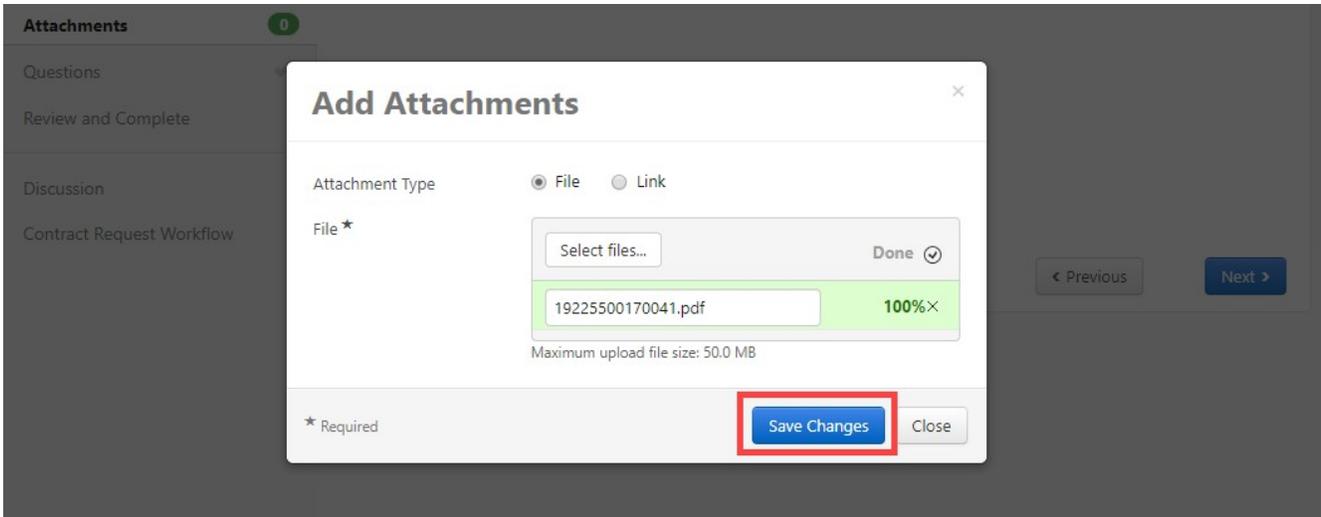
To upload a document, click **Add Attachment**.



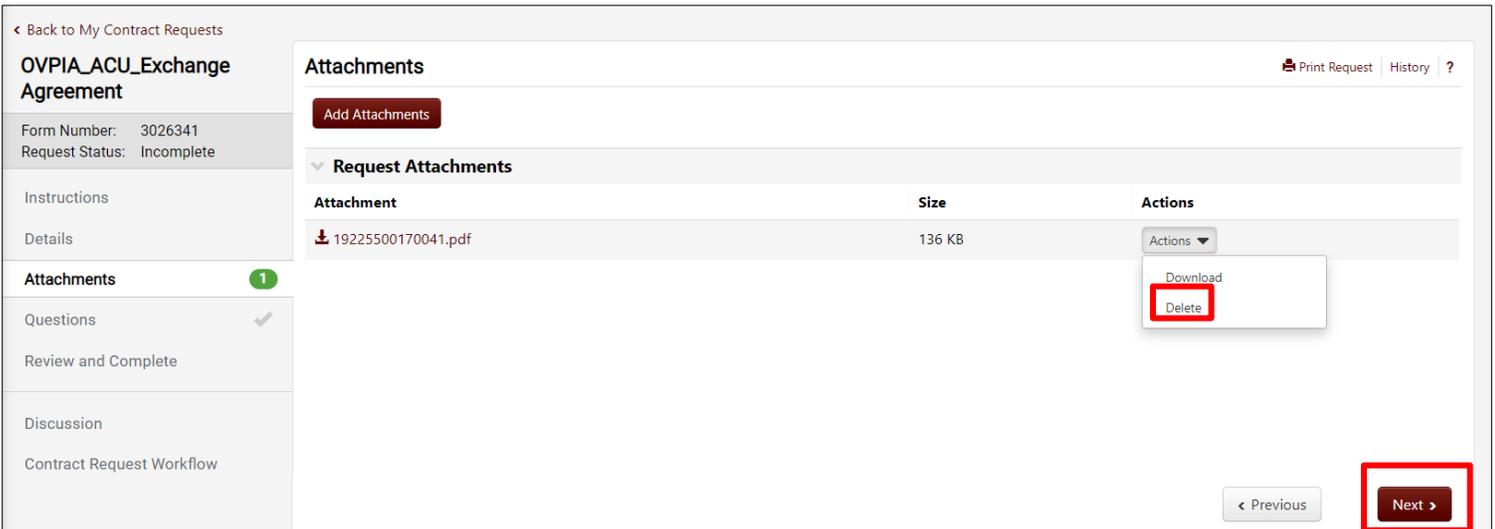
Click **Select files...** to search for the document on your machine. The radio button “File” should be selected.



Click **Save Changes** to upload the document and return to the Attachments main page. Repeat these steps until all documents are attached.



To delete an attachment, select **Delete** from the **Actions** menu next to the attachment. Once all documents are attached, click **Next** to proceed to the Questions page.



Attachment	Size	Actions
19225500170041.pdf	136 KB	Actions ▼ Download Delete

Questions

Basic information about the “Second Party,” or counterparty to the contract, and the contract itself, need to be filled out on this page.

First, enter the date by which you need to have the contract reviewed or created in the **Needed by** field or use the calendar widget to select a date.

← Back to My Contract Requests

OVPIA_ACU_Exchange Agreement

Form Number: 3026341
Request Status: Incomplete

Instructions
Details
Attachments 1
Questions ✓
Review and Complete

Questions - Page 1 Print Request History ?

On This Page

- Contract Information (11)
- OVPGC Specific Questions (7)

Contract Information

Please search for the Second Party to your contract using the look-up function in the Second Party box. If you do not see your Second Party in the look-up box, please select "Request New Supplier" in the drop-down box. From there, you will choose the "IU Legal Contract Party Creation Form."

Needed by:

Search for the second party in the **Second Party** field.

Details

Attachments 1

Questions ✓

Review and Complete

Discussion

Contract Request Workflow

Contract Information

Please search for the Second Party to your contract using the look-up function in the Second Party box. If you do not see your Second Party in the look-up box, please select "Request New Supplier" in the drop-down box. From there, you will choose the "IU Legal Contract Party Creation Form."

Needed by:

Second Party *

Australian

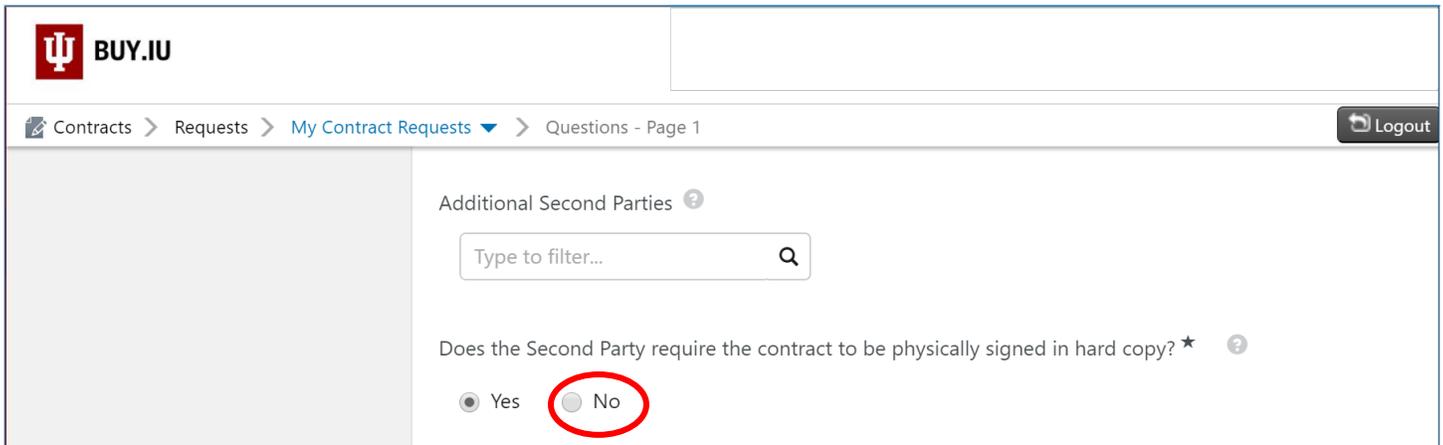
- Australian Catholic University
- Australian National University
- The Australian National University
-

Request New Supplier

Contract to be physically signed in hard copy? *

Yes No

After selecting the appropriate Second Party/Parties, indicate whether the contract needs to be physically signed in hard copy. If “Yes” is selected, OVPGC will route hard copies for signature. If “No” is selected, the contract will route electronically for signature through AdobeSign, which is integrated into BUY.IU.



BUY.IU

Contracts > Requests > My Contract Requests > Questions - Page 1 Logout

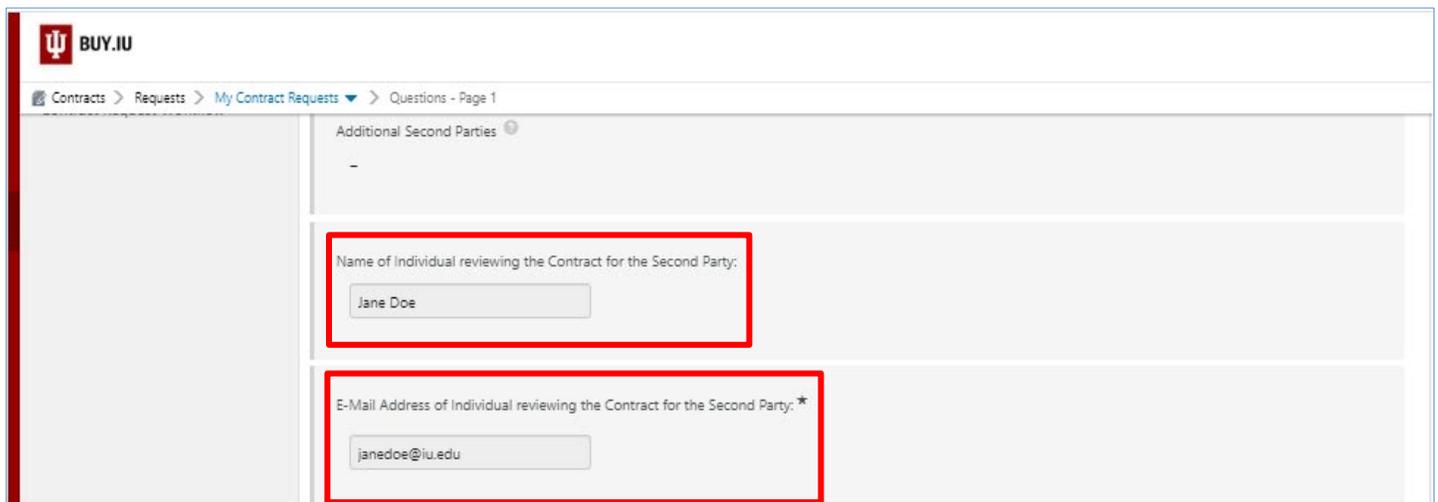
Additional Second Parties ?

Type to filter...

Does the Second Party require the contract to be physically signed in hard copy? ★ ?

Yes No

If “No” is selected, please enter the name and email address of the individual who will sign on behalf of the Second Party. If the Second Party will have multiple signatories, please add any additional signatories and their email addresses in the “Additional Information” box at the bottom of the form.



BUY.IU

Contracts > Requests > My Contract Requests > Questions - Page 1

Additional Second Parties ?

-

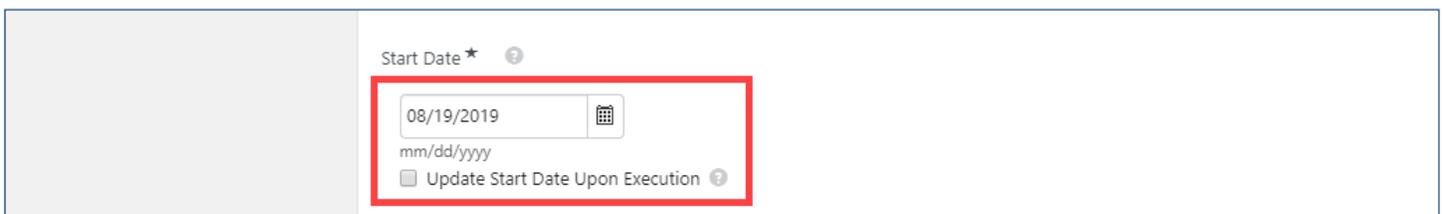
Name of Individual reviewing the Contract for the Second Party:

Jane Doe

E-Mail Address of Individual reviewing the Contract for the Second Party: *

janedoe@iu.edu

Next, enter the start date of the contract in the **Start Date** field or use the calendar widget to select a start date. If desired, check the **Update Start Date Upon Execution** box to indicate that the start date should be updated to the date of execution.



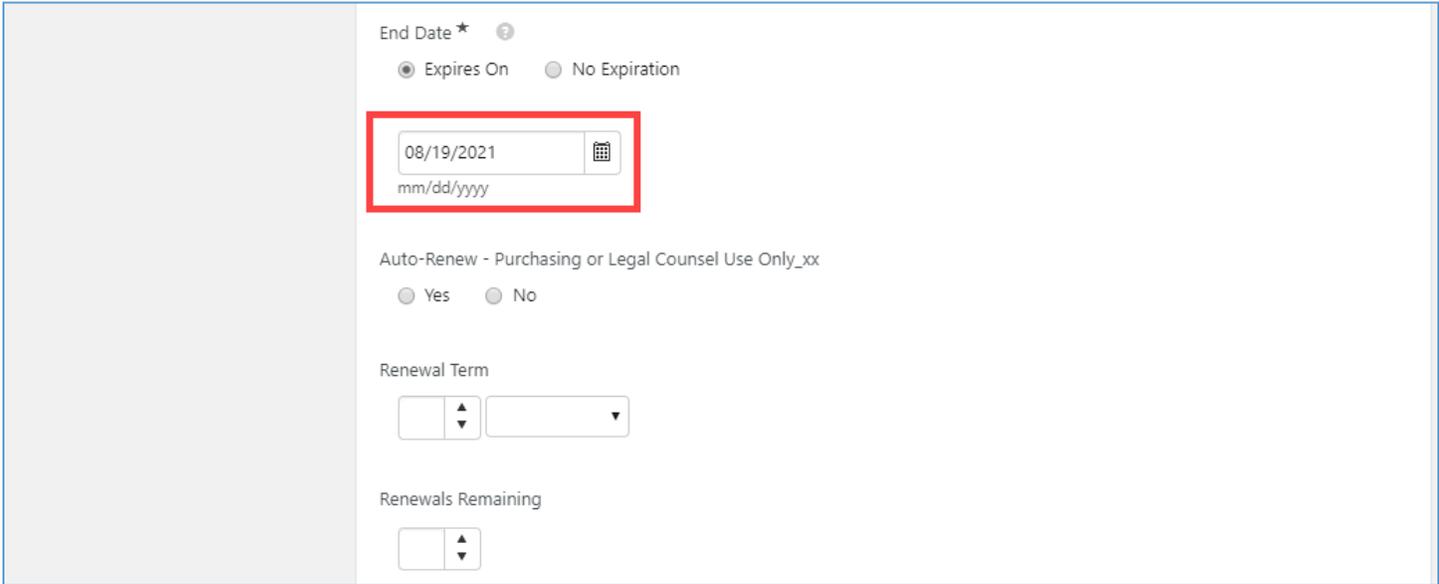
Start Date ★ ?

08/19/2019

mm/dd/yyyy

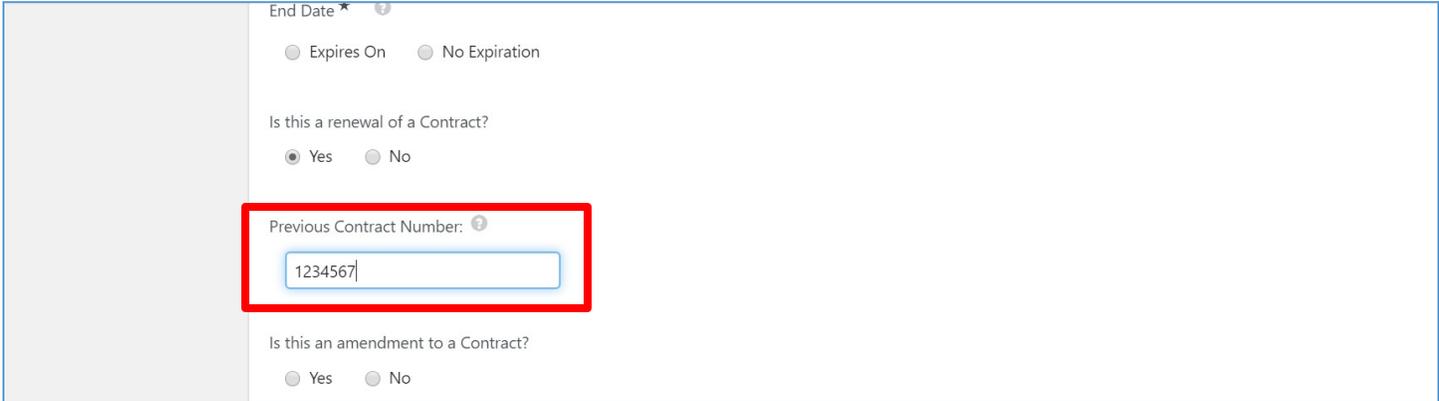
Update Start Date Upon Execution ?

Select “Expires On” and enter the date on which the contract should end. If you do not want the contract to have an end date, select “No Expiration.” Most contracts should have a set end date. Leave the “Auto-Renew” radio button unchecked. If the contract has a specific renewal term, indicate that renewal term and the number of times the agreement can review in the appropriate fields. If the renewal terms are unlimited, enter a high number, such as 100, in the “Renewals Remaining” field.



The screenshot shows a form section for contract details. At the top, there is a label "End Date" with a star and a help icon. Below it are two radio buttons: "Expires On" (selected) and "No Expiration". A date input field contains "08/19/2021" and has a calendar icon to its right. Below the date field is the placeholder text "mm/dd/yyyy". Further down, there is a label "Auto-Renew - Purchasing or Legal Counsel Use Only_xx" with "Yes" and "No" radio buttons. Below that is a "Renewal Term" section with two spinner boxes. At the bottom is a "Renewals Remaining" section with a single spinner box. A red rectangular box highlights the date input field.

If your request is specifically for the renewal or amendment of an existing contract, select “Yes” to the relevant question and enter the existing contract document number in the **Previous Contract Number** field.



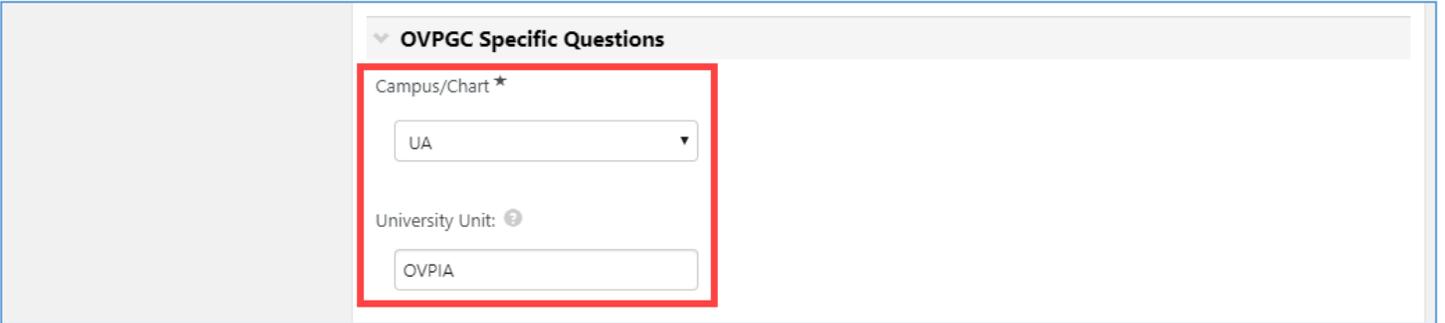
The screenshot shows a form section for contract details. At the top, there is a label "End Date" with a star and a help icon. Below it are two radio buttons: "Expires On" and "No Expiration". Below that is the question "Is this a renewal of a Contract?" with "Yes" (selected) and "No" radio buttons. Below the question is a label "Previous Contract Number:" with a help icon. A text input field contains "1234567". Below that is the question "Is this an amendment to a Contract?" with "Yes" and "No" radio buttons. A red rectangular box highlights the "Previous Contract Number" input field.

Next, complete the fields in the OVPGC Specific Questions section.

Choose your chart code from the **Campus/Chart** drop-down. The table below defines each campus/chart abbreviation.

Campus/Chart	Definition
UA	University Administration
BL	Bloomington campus
EA	East campus
FW	Fort Wayne campus
IN	IUPUI campus
KO	Kokomo campus
NW	Northwest/Gary campus
SB	South Bend campus
SE	Southeast campus

If Bloomington, Indianapolis, or University Administration is selected, an additional field, **University Unit**, will appear. Enter the organizational abbreviation of the requesting university unit or department. You may use the organization code or a standard abbreviation such as “OVPIA” or “OVPIT”, but be consistent when submitting future contracts.



▼ OVPGC Specific Questions

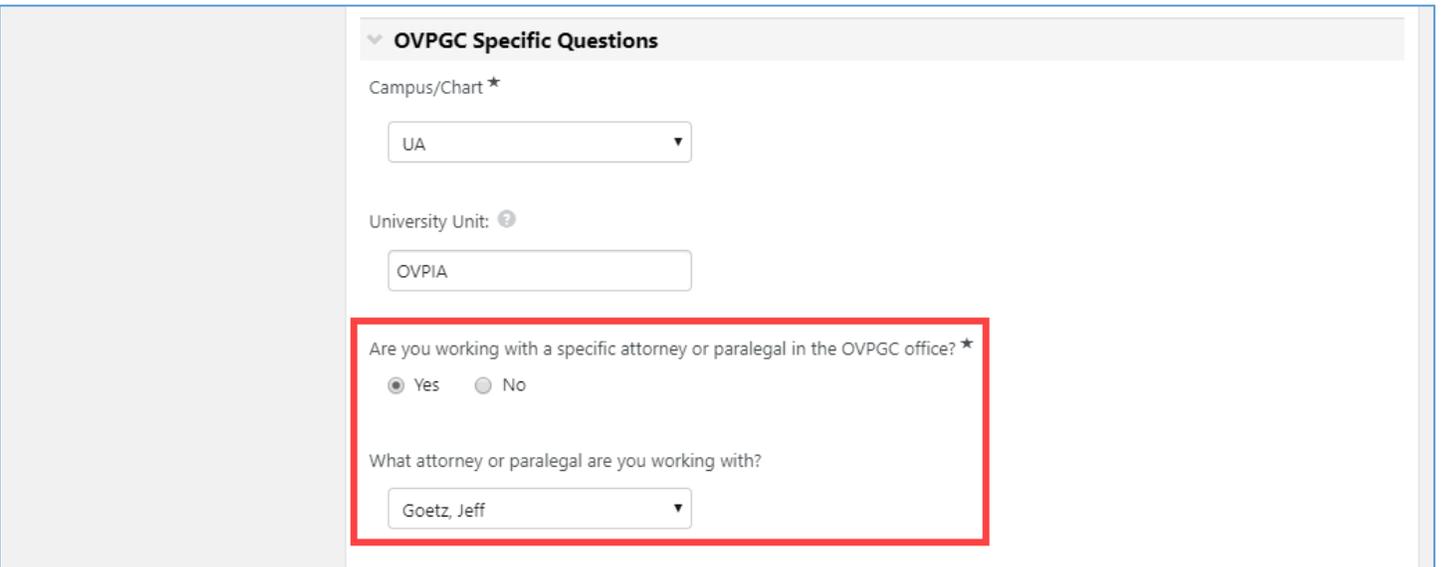
Campus/Chart *

UA ▼

University Unit: ?

OVPIA

If you are already working with a specific attorney or paralegal in OVPGC’s office, answer “Yes” to that question, then select that attorney or paralegal from the drop-down menu that appears. Once submitted, the contract request will route to that attorney or paralegal for review.



▼ OVPGC Specific Questions

Campus/Chart *

UA ▼

University Unit: ?

OVPIA

Are you working with a specific attorney or paralegal in the OVPGC office? *

Yes No

What attorney or paralegal are you working with?

Goetz, Jeff ▼

Choose an option from the next drop-down menu that corresponds to the action you took in the Attachments page of the request form. For example, if you uploaded a completed OVPGC template, select the **“I have attached a contract using an OVPGC template”** option.

Please choose one of the following. *

I have attached a contract using ▾

- I have attached a contract using an OVPGC template
- I have attached a contract that does NOT use an OVPGC template
- I have not attached a contract. I need help creating one.

Additional Information: ⓘ

★ Required

< Previous Save Progress Next >

Powered by JAGGAER | Privacy Policy

Selecting this option populates a new question about whether the template has been modified in any substantive way. Select **“Yes”** if the template has been modified beyond updating basic information like counterparty name, effective date, signatories, etc.

Please choose one of the following. *

I have attached a contract using ▾

Has the template been modified in any substantive way? ⓘ

Yes No

Additional Information: ⓘ

2000 characters remaining

★ Required

< Previous Save Progress Next >

Powered by JAGGAER | Privacy Policy

Finally, enter any additional background information that might be helpful into the **Additional Information** box. Such information may include:

- Additional background information not in the attachments (e.g., text from relevant emails).
- Additional signatory names and email addresses.
- Contract numbers for related contracts or similar contracts that are already executed.
- Any relevant internal approvals.

Review the information entered, select **Save Progress**, and click **Next**.

Please choose one of the following. ★

I have attached a contract using ▾

Has the template been modified in any substantive way? ?

Yes No

Additional Information: ?

2000 characters remaining

★ Required

< Previous **Save Progress** Next >

Review and Complete

Green checkmarks appear next to completed sections of the form. Make changes to a section by selecting it in the left-hand menu. When you have reviewed your information and are ready to submit your request, click **Complete Request**.

Review and Complete

[Print Request](#) | [History](#) | [?](#)

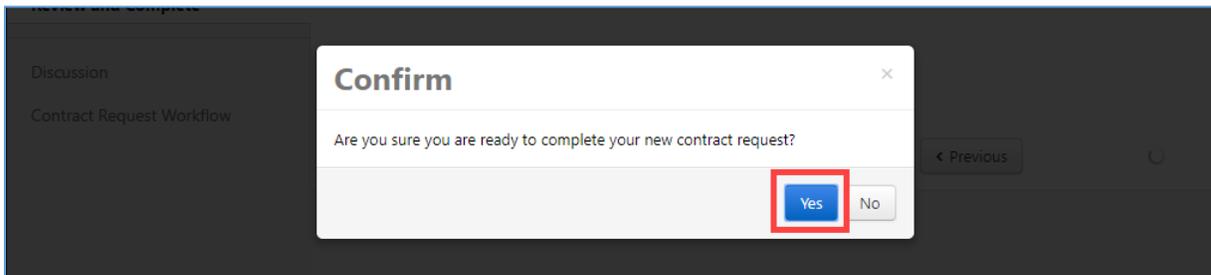
✓ Required fields complete

Section	Progress
Instructions	✓ No Required fields
Details	✓ No Required fields
Attachments	✓ No Required fields
Questions	✓ Required fields complete

★ Required

[← Previous](#) [Complete Request](#)

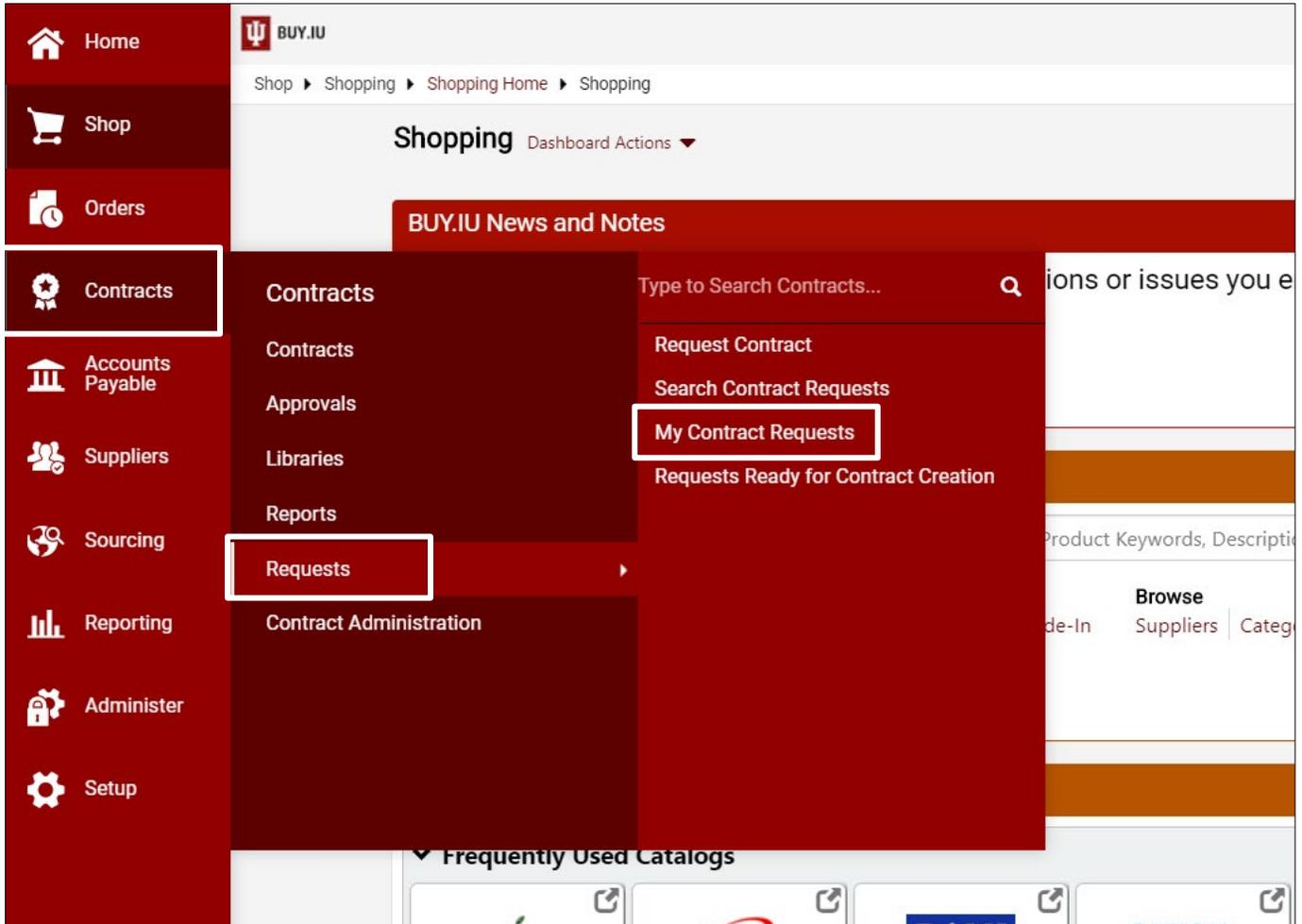
BUY.IU prompts you to confirm your choice. Click **Yes** to submit the form.



Your request has been submitted and routed to OVPGC for review.

Contract Request Status

Check the status of Contract Request Forms you have submitted by navigating to **My Contract Requests** within the **Contracts** module.



Here, you can review every Contract Request Form you have initiated or submitted. The name of the OVPGC staff member reviewing your request is reflected in the **Workflow Assignee** field once review has begun.

TEST_OVPGC_Forward#5	Contract Request for General Counsel's Office (OVPGC)	Lisa Kilgore	Rejected	-	-	2/10/2020 2:50 PM	2/7/2020 1:49 PM	Actions
LMK Test 1	Contract Request for General Counsel's Office (OVPGC)	Lisa Kilgore	Incomplete	-	-	5/26/2020 3:53 PM	5/26/2020 3:53 PM	Actions
TEST for Kylie	Contract Request for General Counsel's Office (OVPGC)	Lisa Kilgore	Completed	-	-	8/18/2020 6:02 AM	8/14/2020 10:05 AM	Actions
TEST_OVPGC_Something_2	Contract Request for General Counsel's Office (OVPGC)	Lisa Kilgore	Rejected	-	-	10/21/2020 12:07 PM	10/19/2020 10:31 AM	Actions
OVPIA_ACU_Exchange Agreement	Contract Request for General Counsel's Office (OVPGC)	Lisa Kilgore	Rejected	-	-	10/28/2020 2:46 PM	10/27/2020 3:54 PM	Actions
OVPIA_ACU_Exchange Agreement	Contract Request for General Counsel's Office (OVPGC)	Lisa Kilgore	Under Review	Contract Request Approval	Ayers, Kylie	10/29/2020 12:08 PM	10/29/2020 12:07 PM	Actions

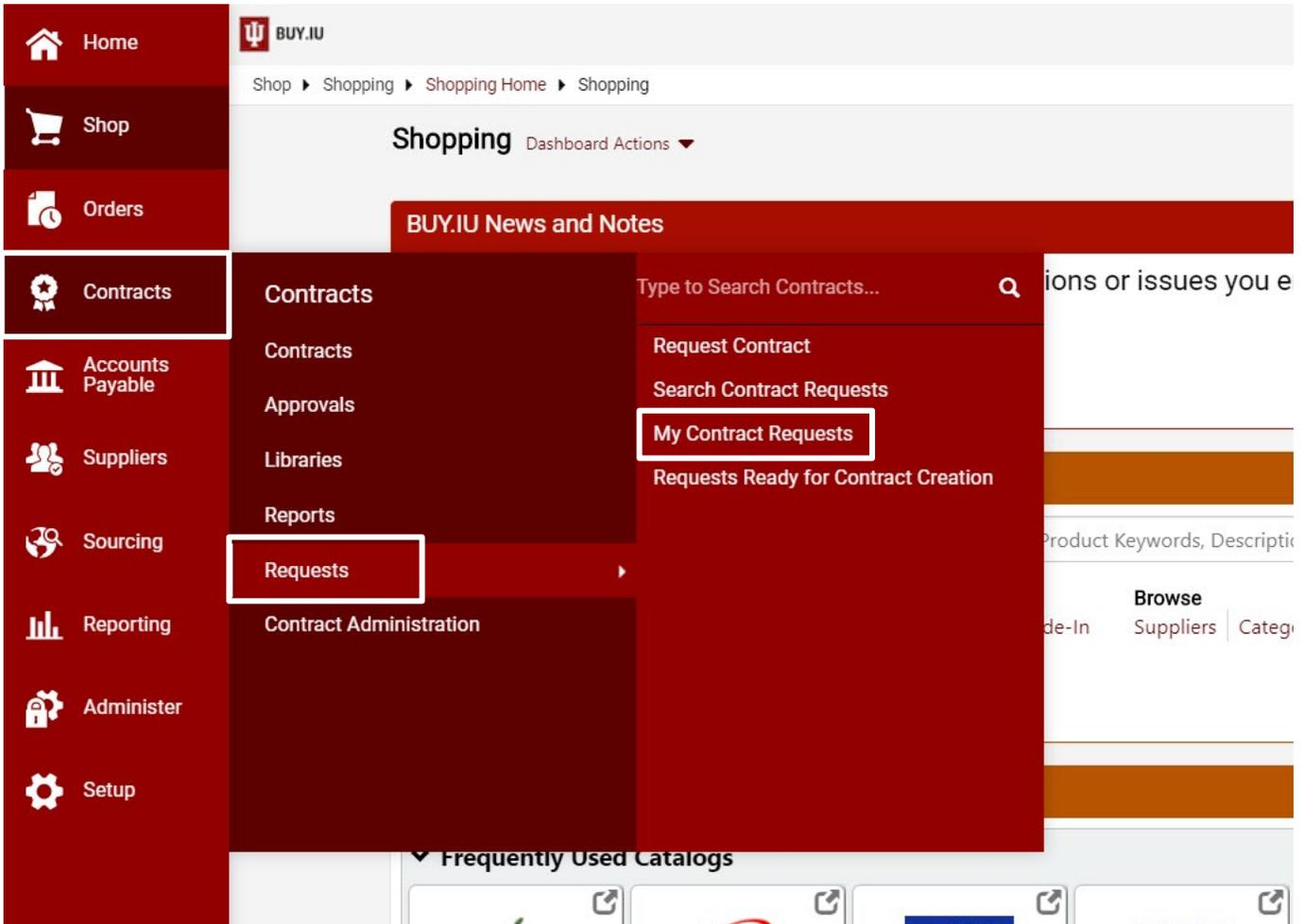
1-17 of 17 Results 200 Per Page

Click **Filter Contract Requests** to specify the types of requests you wish to view. The table below describes each Request Status.

Request Status	Description
Incomplete	A draft Contract Request form which requires additional information from the requestor (for example, the request was started but not submitted). Select Edit from the Actions drop-down menu to continue working on the form.
Under Review	The request has been submitted.
Approved	Approved indicates that OVPGC agrees that this is a valid request and the request form has been appropriately filled out.
Completed	Attorney/paralegal has moved the approved request into the contract review stage of the process where negotiations, if applicable, are done and signatures are obtained.
Returned	A Request that was returned to the initiator by OVPGC staff for additional information or other edits.
Rejected	A request rejected by OVPGC staff. This is rarely done and typically used when the request is in the wrong office or there is already a contract in place.

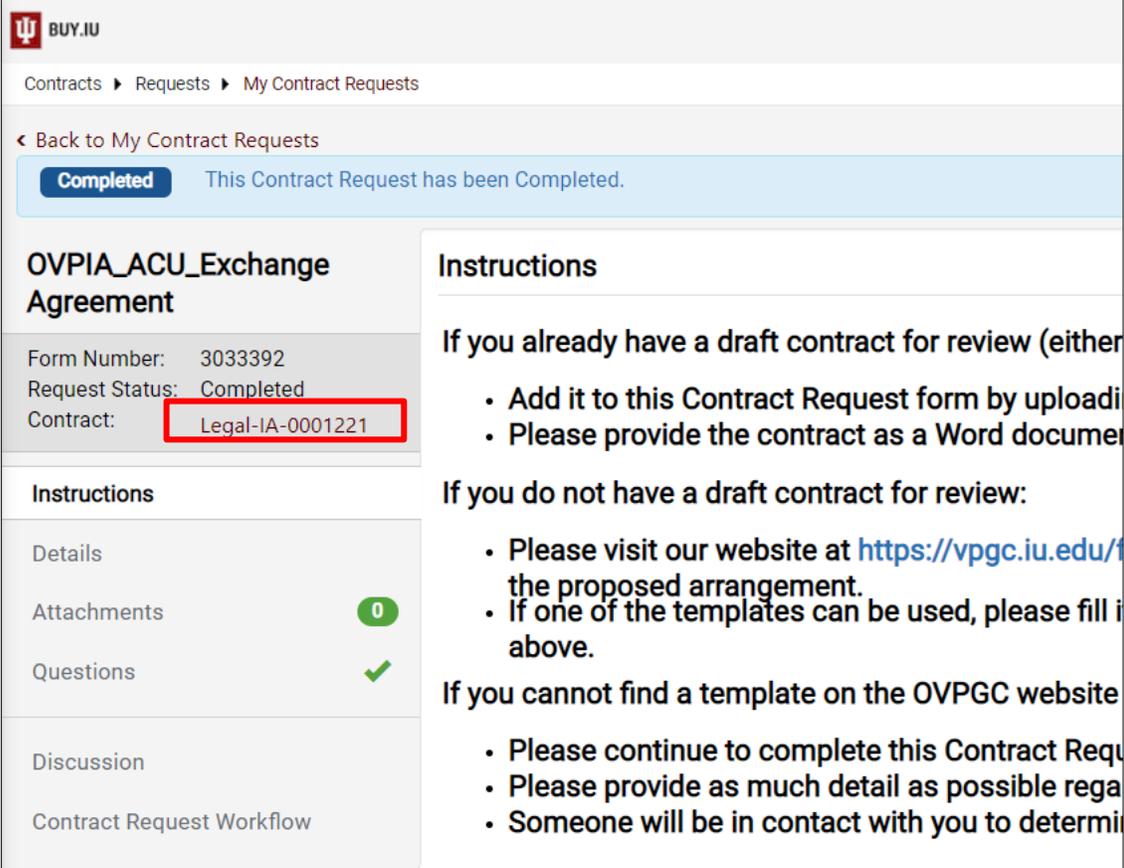
Contract Status

After the Contract Request Form has been completed, you can check the status of a Contract by navigating to **My Contract Requests** within the **Contracts** module.



The screenshot shows the BUY.IU interface. On the left is a dark red navigation sidebar with icons and labels for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Administer, and Setup. The 'Contracts' menu is expanded, displaying a sub-menu with the following items: Contracts, Approvals, Libraries, Reports, Requests (highlighted with a white box), and Contract Administration. A search bar is visible at the top of the sub-menu with the text 'Type to Search Contracts...'. Below the search bar, there are links for 'Request Contract', 'Search Contract Requests', 'My Contract Requests', and 'Requests Ready for Contract Creation'. The background shows a 'Shopping' dashboard with a 'BUY.IU News and Notes' banner and a search bar.

Select the request that corresponds to the contract you wish to know status on. Click on the **Contract Number** to navigate to the Contract Summary.



BUY.IU

Contracts ▶ Requests ▶ My Contract Requests

< Back to My Contract Requests

Completed This Contract Request has been Completed.

OVPIA_ACU_Exchange Agreement

Form Number: 3033392
Request Status: Completed
Contract: **Legal-IA-0001221**

Instructions

If you already have a draft contract for review (either

- Add it to this Contract Request form by uploadi
- Please provide the contract as a Word document

If you do not have a draft contract for review:

- Please visit our website at <https://vpgc.iu.edu/> the proposed arrangement.
- If one of the templates can be used, please fill i above.

If you cannot find a template on the OVPGC website

- Please continue to complete this Contract Requ
- Please provide as much detail as possible rega
- Someone will be in contact with you to determini

Details

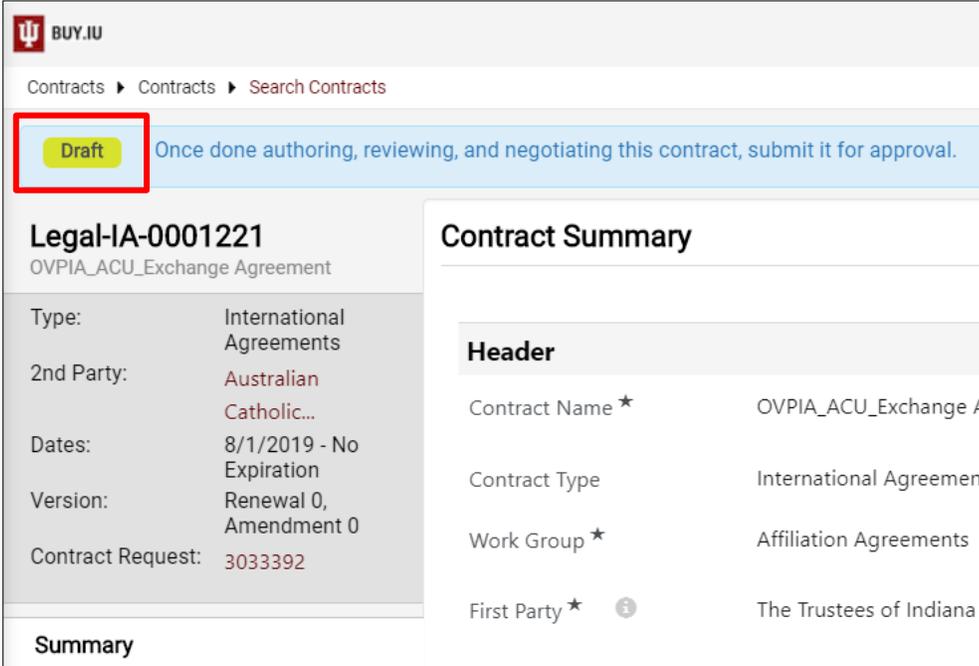
Attachments **0**

Questions 

Discussion

Contract Request Workflow

The status of the contract shows in the left-hand corner of the Contract Summary page.



BUY.IU

Contracts ▶ Contracts ▶ Search Contracts

Draft Once done authoring, reviewing, and negotiating this contract, submit it for approval.

Legal-IA-0001221
OVPIA_ACU_Exchange Agreement

Type: International Agreements
2nd Party: Australian Catholic...
Dates: 8/1/2019 - No Expiration
Version: Renewal 0, Amendment 0
Contract Request: 3033392

Contract Summary

Header

Contract Name *	OVPIA_ACU_Exchange A
Contract Type	International Agreemen
Work Group *	Affiliation Agreements
First Party * 	The Trustees of Indiana

Summary

The table below describes each Contract Status.

Request Status	Description
Draft	The contract is being worked on by our office. It is either being reviewed for edits or we are waiting for additional information.
Internal or External Review	The contract has been sent for review to another party prior to being sent out for signature.
Out for Signature	The contract has been sent out for signature.
Executed: In Effect	The contract has been signed by all parties and is currently in effect.
Executed: Future	The contract has been signed by all parties and will be in effect on the start date.
Expired	The contract is no longer in effect and expired on the End Date shown in Buy.IU.
Superseded	The contract entry you are reviewing is not the most recent entry. This could mean that the contract has been renewed or an amendment has been done to the contract.
Terminated	The contract has been terminated by either party to the contract.