

Office of the Vice President & General Counsel (OVPGC)

BUY.IU - Submitting a Contract Request Form to OVPGC

Summary Guide



1. Prepare the Draft Agreement

- a. Consider whether OVPGC is the appropriate IU office to review your agreement.
 - i. If you have an agreement that involves purchasing goods or services, please contact IU Purchasing instead.
 - ii. If you have an agreement that deals with sponsored research, please contact the Office of Research Administration (ORA) instead.
 - iii. If you have been delegated signature authority and the agreement falls within that authority, you can execute the agreement without OVPGC review.
 - iv. If the agreement does not fall within one of the above categories, submit it to OVPGC by following the steps in this summary guide.
- b. The draft agreement should typically be based on an OVPGC template and submitted with changes tracked; approved templates are available on OVPGC's website at - <https://vpgc.iu.edu/forms/index.html>
 - i. Note – If your agreement can be signed electronically (i.e., no physical or “wet” signature required) and is based on an OVPGC template, then please use the OVPGC template version that contains electronic signature codes within the template's signature lines.
- c. If you're submitting a contract received from the counterparty, please submit as a Word document with a “.docx” extension.

2. Add the Counterparty in Buy.IU

- a. From the Buy.IU dashboard, go to the 'Suppliers' flyout on the left-hand side, hover over 'Manage Suppliers,' then select 'Search for a Supplier.' Search for the counterparty.
- b. If the counterparty is already listed in Buy.IU as a Supplier, you can proceed to Step 3. If the counterparty is not listed in Buy.IU as a Supplier, you will need to add them to the system before proceeding with creating the contract request. To add a new Supplier:
 - i. Under 'Suppliers,' hover over 'Requests,' and select 'Request New Supplier.'
 - ii. Then choose 'IU Legal Contract Party Creation Form' from the drop-down menu.
 - iii. Update the 'Supplier name' field so it reflects the full name of the counterparty and click 'Submit.'

- iv. Click 'Next' on the "Instructions" page.
- v. The 'Supplier Name' is the only required field. Once 'Supplier Name' is filled in, you can submit the request by going to the 'Review and Complete' page, checking the box next to the certification, and clicking 'Complete Request.'
- vi. Once you complete these steps, the Supplier Request is automatically approved and the counterparty will be available to select when creating your Contract Request.

3. Submit a Contract Request in Buy.IU

- a. From the Buy.IU dashboard, click on 'Request Contract' within the Contracts "Quick Links" box or go to the 'Contracts' flyout on the left-hand side, hover over 'Requests', and select 'Request Contract.'
- b. A new window will open; insert the 'Contract Request Name' using the following naming convention: IU unit abbreviation_counterparty name_contract type
 - i. Example: OVPIA_MoiUniv_ExchangeAgmt
- c. Then click 'Select a Contract Request Template,' choose 'Contract Request for General Counsel's Office (OVPGC)' and click 'Submit.'
- d. Review the 'Instructions' page, then click 'Next'.
- e. Then click on the 'Attachments' page (in the gray box on the left-hand side), upload the draft agreement from Step 1 as a (.docx) redlined Word document.
 - i. Please also upload any additional background documents, appendices, or exhibits referenced in the contract if not already included in the contract document.
- f. Next click on the 'Questions' page and fill out the required fields and any other applicable fields such as the "Needed by" date.
 - i. Search for the counterparty in the 'Second Party' field.
 - ii. Indicate whether the contract needs to be signed in hard copy.
 - 1. If 'Yes' is selected, OVPGC will route hard copies for signature.
 - 2. If 'No' is selected, the contract will route electronically for signature through AdobeSign, which is integrated into Buy.IU.
 - a. If 'No' is selected, please enter the name and email address of the individual who will sign on behalf of the counterparty (if you have that information at this stage)
 - b. If the counterparty will have multiple signatories, please add any additional signatories and their email addresses in the "Additional Information" box at the bottom of the form.
 - iii. Enter a proposed Start Date and End Date
 - 1. You can also check "Update Start Date Upon Execution."
 - 2. If you do not want the contract to have an end date, select "No Expiration"; however, most contracts should have an end date.
 - iv. Leave the 'Auto-Renew' button unchecked. If desired, add a Renewal Term and under "Renewals Remaining" indicate the number of times the agreement can renew. If the renewal terms are unlimited, enter a high number, such as 100, in the "Renewals Remaining" field.

- v. If your Contract Request is for a renewal or amendment of an existing contract, select “Yes” in response to that question and then enter the existing contract number if it was created in BUY.IU. (If the original contract preceded Buy.IU be sure to include a copy of the original contract as an attachment.)
- vi. Choose your Campus/Chart from the drop-down menu.
 1. If Bloomington, Indianapolis, or University Administration is selected, an additional field, University Unit, will appear. Enter the organizational code or standard abbreviation of the requesting unit or department (e.g., “OVPIA” or “OVPIT”).
- vii. Complete the fields asking whether you are working with a specific person in OVPGC, and whether you have attached an agreement based on an OVPGC template.
- viii. Finally, enter any additional background information that might be helpful into the Additional Information box; examples may include:
 1. Text of a relevant email
 2. Any necessary internal reviews (e.g., from Export Controls or IU’s Revenue Producing Activity Committee)
 3. Names and email addresses of additional signatories (if you have multiple signatories, and the agreement will be electronically signed)
- g. Review and Complete the Contract Request form

QUICK TIPS

- **“.Doc” Files Won’t Work:** To generate a “.docx” file, open the original Word document and save it using “Save As” as a “.docx” file. Then upload the “.docx” file into BUY.IU.
- **Duplicate the Browser Tab:** If you do not want to leave a certain page on BUY.IU while looking at something else in BUY.IU, you can duplicate the internet browser tab. For example, in Firefox you can right click the browser tab and hit “Duplicate Tab.”
- **Full Contract Request Instructions:** If you are stuck, you can review step-by-step instructions with screenshots in the “OVPGC Contract Request Form” documentation.
- **Check the Status of Your Contract Requests:** Click “My Contract Requests” from the Contract Quick Links on the OVPGC Client Dashboard or go to the “Contracts” flyout, hover over “Requests,” and select “My Contract Requests”; click “Filter Contract Requests” to specify the ones you want to view based on status.
- **Review of OVPGC edits:** You may receive an email from BUY.IU (an @network.jaggaer.com email address) asking you to review our office’s edits to the agreement; if you receive a link in that email, you can go into the Contract File within BUY.IU to review and edit the latest version; if you receive an email with the contract attached, you can review and edit the Word file and then respond to that email with your updated version.