BuyLU Contract Requester Guide

Liberty University, Inc.

Table of Contents

Requesting a Contract	
Steps to Request a Contract	
Notes:	7
Viewing Your Contract Requests	7
Review Rounds	7
Steps to Using Review Rounds	
Approving a Contract	
Department Approvals	
Conditional Approvals	
Notifications	
Steps to Set Notifications	
Searching for Contracts	
Definitions of Contract Status	

Requesting a Contract

Please submit a request to review a contract before submitting a requisition. You may submit a requisition after the Contract Administrator has reviewed and negotiated the contract. You will receive a notification from the Contract Administrator to start your requisition.

Contracts with an IT Component:

You may submit contracts with IT implications through the Contract Request Form through BuyLU Contracts. To assist with the process, we have added a new question to our Contract Request Form and well as the definition of software according to our PCard Policy.

New Question

"Does this contract include software or computer/av hardware?"

Our department will ensure IS Accounts reviews your contract through an internal review round.

You will only need to submit a ticket to IT if you are requesting a software quote request, need a project manager or requesting a new project such as implementation.

Information Technology Department/ Project Managers:

Please refer to your department's training documentation for workflow in regards to the timing of the service now ticket and contract request.

Short Form Contracts:

Liberty University has developed standard contract templates for use by university personnel when conducting business. If selected, they must be used as is with no alterations. Standard Form Agreements with a total obligation \$2500 or less may be signed by the department head.

You do not need to follow the process below for unaltered short form contracts. Please place the short form on a requisition. The Buyer will process the short form.

You only need to follow the process below if the vendor has requested changes to the short form contract.

Travel Agreements (ex: hotel, charter bus and airline):

Please use the Travel Contract Request Form which will automatically route to the Travel department.

Steps to Request a Contract

1. In BuyLU navigate to Contracts>Requests>Request Contract

*	EU.		My Profile
ñ	Home	♡buyLU	
Ì	Shop	My Profile > Notification Preference	es Scontracts
٩	Documents		Notification Preferences: Contracts
ġ	Contracts	Contracts	Type to Search Contracts Q
Ĥ	Accounts Payable	Contracts	Contracts Search Contracts
e dii	Suppliers	Reports Requests	View Saved Searches Create and Manage Export Templates
1	Sourcing		Search Contract Parties
d.	Reporting		View Import/Export Results

2. Enter the Contract Request Name and select either Contract Request Form, Affiliation Contract Request Form or Contract Termination Request. The magnifying glass will display the options. Hit Submit.

×

- The Contract Request Name should be: Name of Vendor Type of Contract
- Example: Bob's Auto Parts Service Contract

Create Contract Request

Contract Request Name *	test	
Select a Contract Request Template *	Affiliation Agreement × Request Form	Q
* Required	Submit	Close

Select a Contract Request Template ×

Name	Description	
Affiliation Agreement Request Form	-	🛱 Remove
Contract Request Form	-	Select
Contract Termination Request	-	Select
elected Value		

3. The Instructions screen provides information for completing the request.

test	Instructions	History	?
Form Number: 1525171 Request Status: Incomplete	Please complete the following "Attachments" and "Questions" steps in order for your Contract to be reviewed.		
	In the Attachments step, please include all agreements requiring review, information you feel is pertinent to the review, and the supplier's W-9 for new vendors.		
Instructions	In the Questions step, please answer all questions to avoid delays in the review process.		
Details	Please use the following format for the Summary:		
Attachments 0	DESCRIPTION [OF REQUIREMENT]:		
Questions	Please provide a description of the service or commodity [in sufficient detail to understand type, quantity and scope]		
Questions	BUSINESS PURPOSE:		
Review and Complete	Please provide the business purpose [of the requirement in sufficient detail to communicate expected outcomes, impact and/or risk if not purchased.		
	If you have any questions, please call the Contracts Office at 592-3012. You may also send an email to contracts@liberty.edu.		
Discussion			
Contract Request Workflow			
	Next	>	

4. The Details screen allows you to edit the Contract Request Name if needed.

test	Details		
Form Number: 358989 Request Status: Incomplete	Contract Request Name *	test	
Instructions	Template	Affiliation Agreement Request Form	
Details	Contract Type	Affiliation	
Attachments 0	Description	-	

5. Please attach the contract and documentation on the Attachments screen by clicking Add Attachments. Select a file from your desktop and hit Save Changes. You may attach as many files as needed. Attachments may include but are not limited to Terms of Service, Certificate of Insurance, a W-9, or a quote.

test	А	ttachments		🖶 Print i
Form Number: 358989 Request Status: Incomplete	ſ		Attachments	
		Add Attach		
		Attachment Type	💽 File 🛛 Link	
Attachments	0	File *	Select files	
			Maximum upload file size: 50.0 MB	
		* Required	Save Changes Close	

- 6. The Questions screen will differ between request forms but mandatory questions are indicated with an *.
 - A Contract Administrator will be able to make changes to the information entered on the request form if needed.
 - The question marks provide helpful tips.
 - If you are using the Contract Request Form, please use the following format in the Summary box:

Please use the following format:

DESCRIPTION [OF REQUIREMENT]:

Please provide a description of the service or commodity [in sufficient detail to understand type, quantity and scope]

BUSINESS PURPOSE:

Please provide the business purpose [of the requirement in sufficient detail to communicate expected outcomes, impact and/or risk if not purchased.

7. The Review and Complete screen will allow you to submit the request. If all of the sections have a green arrow, you may hit Complete Request. If a section is incomplete (grey), click on the section and complete. You may then complete your request.

test	Review and Complete	🖨 Print Request	
Form Number: 358989 Request Status: Incomplete	All sections with required fields must be comple	te before you can complete your request	
Instructions	Section	Progress	
Details	Instructions	 No Required fields 	
Attachmonts	Details	 No Required fields 	
Attachments	Attachments	 No Required fields 	
Questions	Questions	Incomplete	
Review and Complete			

8. A Contract Administrator will approve or return the request after submission.

9. If a request is missing information, you will receive a notification informing you that the request has been returned.

Notes:

- You may save your progress at any time by clicking Save Progress.
- The Previous and Next buttons can be used at any time during the request process without losing the information you just entered.
- On the left side of the screen, you may view the steps for creating a contract request.
- You may view the progress of your request under Contract Request Workflow.
 - *Incomplete* means you have not submitted the request.
 - Approved means the Contract Administrator has approved your request.
 - *Returned* means the request has been returned to you for completion.
 - Completed means that the Contract Administrator has started the review process.
- If you use Internet Explorer, you may not be able to view every field on forms. It is best to use a different browser.

Viewing Your Contract Requests

- 1. Navigate to Contracts>Requests>My Contract Requests
- 2. You may filter requests by request status under Filter Contract Request.
- 3. If the Request Status is incomplete, the Action dropdown will allow you to edit or delete the request. If the status shows approved, you will only be able to view the request.
- 4. You may also create a new contract request on this screen by clicking Create New Contract Request in the upper right corner.
- 5. Please note that an approved status on the contract request does not mean that the contract has been approved rather that the request has been sent to the Contract Department to begin the contract creation process. Once a contract has been created, the status will read Completed.
- 6. The Contract Administrator will add you, as well as the department head, as stakeholders on the contract, which will allow you to view the contract progress.
- 7. You can find your contract record number in your completed request form.

Completed	This Contract Req	uest has been Completed.
LU Test 123	5	Instructions
Form Number: Request Status:	44092 Completed	Please complete the
Contract:	LIB2020-0406	In the Attachments
Instructions		In the Questions st

Review Rounds

Review Rounds allow the Contract Administrator to send a contract to internal and external recipients during the review process.

Depending on your user preferences, contracts that have been sent to you for review appear under Action Items > Contracts to Review, and/or Notifications > Contract Ready for Internal Review or you may also receive an email notification with links to the contract.

Steps to Using Review Rounds

 Open the contract to review by selecting Action Items > Contracts to Review, or Notifications > Contract Ready for Internal Review, or click the links provided in your email notification. A list of contracts that need to be reviewed or the contract that you selected to review opens, depending on your method of access.

Sarah Marinkovic	h-Durfee 👻 🛨 📴 🎝 🕹 💆 10.00 USD 🛛 Search (Alt+Q) 🔍 🔍
	Action Items
you use our Solution, we process	Contract
	Contracts to Review (Internal Review)
lotifications will be automatically remove	Contracts to Review (External Review)
Notifications Found	24 Page 1 * of 2 *
To Marinkovich-Durfee, Sarah (Procurement &	dy for Internal Review Contract Admin) age is displayed, click here to view it in a web browser.
Dear Sar	ah Marinkovich-Durfee,
Contract	No. Test is now ready for your review.
Use the l	ink below to access the contract within the application as appropriate.
View Con	tracț
Thank Ye	bu,
Liberty U	niversity

Support Team Contact Information:

+1 434-592-3012

2. If you accessed Action Items or Notifications, click on the contract number of the contract you need to review. The contract document opens.

3. Review the contract. To make changes, check out the contract (on the Review Round screen) and check it back in once your changes have been made. To check out a contract click Contract Actions>Check Out (in top right hand corner).

Internal Review You are a reviewer. You can check out the contract to make changes, then finish your review. Contract must be in a Fully Executed status before it can be made active for shopping.						
Test Copy of Vine Center Chairs	Review Rounds			Check Out Assign Contract Facilitator		
Type: Blanket Order 2nd Party: Harris Office Furni Dates: 11/29/2016 - No Expiration	This contract has 2 completed rounds c	Download Full Contract as PDF				
Version: Renewal 0, Amendment 0	Current Round (Internal - Ma	anual) (5/16/2019 -)		Сору		
 Lifetime Spend (USD) 	No message exists. Edit			Add Internal Message		
Summary	Tracking	Reviewer	Comment	Start External Communication		
Header 🗸	Sent 🚯	Marinkovich-Durfee, Sarah	-	Actions		

4. You may also need to upload attachments or new versions of attachments during your review (in the attachment screen). Please do not alter any other tabs.

Test		Attachmen	ts					History	?
Copy Of Vine Center Volu Type: Blanket Order 2nd Party: Harris Office Furni Dates: 11/29/2016 - No Expiration Version: Renewal 0, Amendment 0		General (1) Add Attachment	Obligations (0)						
Lifetime Spend (USD) Upload Main Document		Print Order ▲	Attachment 🗠	Print with Full Contract $ riangle$	Version 🗠	Size 🛆	Date Uploaded 🗠		
Summary		1	➡ KRMC Student Affiliation Agreement Template -2019.doc (1).docx	4	2	33 KB	5/8/2019 1:38:17 PM	Actions 💌	
Header	~							Download	arties I
Alternative Language	0							Upload N	ew Version
Attachments	1							Version H	istory
Obligations	0							Set as Ma Delete	in Document
Review Rounds	3								

5. Once you have completed your review, please be sure to Check In the document then mark Done with my Review. This can be done either by going to Contract Actions > Done with My Review, or by going to the Review Rounds screen and selecting Actions > Done with My Review to the right of your name within the current round's table. The Done with My Review window opens.

Internal Review You are a review	er. You can check o	out the contract to make changes, then finish you	<u>ir review</u> .				Contract Actions 🔻
This contract mu	ist be in a Fully Exe	cuted status before it can be made active for sho	opping.				Done with My Review
Test Copy of Vine Center Chairs	Attachme	nts					Check In Assign Contract Facilitator
Checked out To You Type: Blanket Order	General (1)	Obligations (0)					Download Full Contract as PDF
2nd Party: Harris Office Furni Dates: 11/29/2016 - No Expiration Version: Renewal 0 Amendment 0	Add Attachmer	uts 🔽 Upload Main Document 🔻					Сору
Lifetime Spend (USD) Upload Main Document	Print Order 🔺	Attachment 🛆	Print with Full Contract 🗢	Version 🗠	Size 🛆	Date Uploaded 🗠	Add Internal Message Start External Communication
Summary	1	L KRMC Student Affiliation Agreement Template -2019.doc (1).docx	×	2	33 KB	5/8/2019 1:38:17 PM	View/Reactivate Subscribers
Header							

6. Enter notes about the review.

Done with My Review

Review Complete	e			
05.1		 	 	
85 characters remain	ning			

- 7. Click Done with My Review.
- 8. Once all reviewers are done, the status of the contract is set back to Draft and internal reviewers who are not a contract Administrator can no longer access the contract to edit.

×

9. The Contract Administrator will receive a notification that the contract has been reviewed.

Approving a Contract

We will no longer use the paper contract routing form for contract approvals. Below is an image of the signature requirements on the paper contract routing form for reference. All approvals will be obtained through an approval workflow within the contract record. When approvals are being obtained, the Status of the contract record will show Pending Approval.

Departmental Review (Department Head (DH) signature	Signature	Recommend for Approval
required - Director/VP/Dean) Name (Print)		Yes No Date
DH Conditional Review (May include IT, Marketing, etc.)	Signature	Recommend for Approval
(Pint)		Yes No Date

Department Approvals

- 1. A Department Head is a Director, Dean or VP responsible for approving the contract.
- 2. When submitting the contract request, the Requester will need to indicate their Department Head on the request form.
- 3. If the department requires approvals before their Department Head approval, please add the name and reason in the Summary box.
- 4. The Contract Administrator will send the approval round to the appropriate person through an Ad-Hoc Approval.
- 5. The Approver will receive a notification by email or in the notification bell within BuyLU. See below for examples. Both notifications will take you directly to the contract record by clicking View Contract or Go To Contract.

Reply Reply All G Forward SIM		
BuyLU TEST Prod	curement <buylutes<u>t@liberty.edu></buylutes<u>	
RE: Contract Approval	Workflow for Joe Schmoe is Pending your <mark>Ad-hoc</mark> Approval	
 If there are problems with how this message 	ge is displayed, click here to view it in a web browser.	
\heartsuit k	buyLU	
Dear Sara	ah Marinkovich-Durfee,	
You have has been	been assigned as an ad-hoc approver for the contract Joe submitted into Contract Workflow and is awaiting approval	Schmoe which
Use the li	nk below to access the contract within the application as ap	propriate.
View Cont	ract	
Summary		
Contract	Name: Joe Schmoe	
Contract Message	Submit Date & Time: 7/1/2019 10:18 AM EDT From: Justin Wilson	
Message	: Please review and approve.	
Notifications		
Contract - Appro	wal Workflow	
Contract Pending Contract#: LIB2020	Workflow Ad-Hoc Approval -0405(Testing Approval) - Pending W	Jul 9 X

6. The Approver is able to open the attachment to review but cannot make any changes to the contract record. Click Attachments on the left side.

Summary	
Header	•
Financials	×
Payment	×
Miscellaneous Information	×
Additional Vendor Inform	×
Approvals Required	×
Student Information	
Alternative Language	0
Attachments	2

7. You may click on the Full Contract PDF, name of the Attachment, or Actions>Download. If there are multiple Attachment Lines, click Actions on the line you want to view.

Attachmen	ıts					History
Contract was	sent for approval on 7/9/2019. act PDF (55 KB)					
General (1)	Obligations (0)					
Print Order 🔺	Attachment 🗠	Print with Full Contract 🗢	Version 🛆	Size 🛆	Date Uploaded 🗠	
1	L Robert Wentz MPA CRF.pdf	<u> </u>	1	58 KB	7/9/2019 9:43:25 AM	Actions 🔻 Download
						5

- 8. Once you have reviewed the contract, click Contract Actions in the top right corner of the contract record.
- 9. If you do not approve the contract, click Return to Draft. The system will send the record back to the Contract Administrator. The record will need to go back through approvals.
- 10. If you approve the contract, click Approve.
- 11. If you need to send to another person to review and approve, click Contract Actions>Assign to Myself>Add Ad-Hoc Approver.
- 12. Choose the Ad-Hoc Approver and enter your comment. Then click Contract Actions>Approved.

×

Ad-Hoc Approver	Type to filter	Q
Comments		
		11
	1000 characters remaining	

Add Ad-Hoc Approver

13. The next Ad-Hoc Approver will follow the same process.

Conditional Approvals

1. Once approved by the requesting department, the record will automatically route to the Conditional Approvers chosen by the Contract Administrator. The Conditional Approvers can include but are not limited to Risk Management, IT, and Marketing. The Conditional Approver will receive a notification to go to the record and follow the same process to view and approve the contract as above (steps 7-13).

Notifications

Notification settings can be adjusted to suit your work style. It is important to check your setting when first working in BUYLU CONTRACTS as the settings may be defaulted to *None*.

Steps to Set Notifications

- 1. Navigate to your profile by clicking on your name in the top right corner of buyLU >View My Profile>Notification Preferences
- 2. Please edit both Contracts and Form Requests. Click Edit Selection to modify preferences. You may choose to receive notifications to your personal email only, notifications in the BUYLU CONTRACTS only or both.

Searching for Contracts

You may search for any contract you submit a Contract Request for or a contract you have been assigned a Stakeholder to.

Ways to Search:

- 1. Contracts>Requests>My Contract Request. The LIB number will be listed in the top left box if the request is in Complete status.
- 2. Contracts>Type to Search Contracts....
- 3. Contracts>Contracts>Search Contracts. You have the option to search with advanced filters.

Tips:

- 1. Under Contracts>Contracts>Search Contracts, make sure 3 dropdown options are set to All.
- 2. Searching without the Advanced Filters will search all searchable fields.
- 3. Search is not case sensitive.

Definitions of Contract Status

If you are looking at a Contract Request:

- *Incomplete* means you have not submitted the request.
- Approved means the Contract Administrator has approved your request.
- Returned means the request has been returned to you for completion.
- *Completed* means that the Contract Administrator has started the review process. A contract record number will show on your request.

If you are looking at a Contract Record (LIB# assigned):

- 1. Draft- a Contract Administrator is working on the review.
- 2. Internal Review- the contract is being reviewed by an employee at LU but it is not a Contract Administrator. Please contact <u>contracts@liberty.edu</u> if you would like to know who the contract is with internally.
- 3. External Review- the contract is with the vendor for review.
- 4. Pending Signature the contract is in the approval process.
- 5. Out for Signature- the contract is being routed for signatures.
- 6. Executed: the contract has been fully executed
- 7. Expired/Complete: The term of the contract has expired