How To Enter a Contract

HOW TO CREATE A CONTRACT REQUISITION

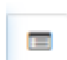
A contract requisition is used when seeking professional services, service agreements, maintenance services, professional development workshops, etc. Entering a contract in BusinessPLUS is a **two-step process.** The contract should be first created in the **Contract Management – CMUPCM** screen, and then approved in the "**Enter Purchase Requests– POUPRC**" screen.

STEP 1

1. To create a Contract Requisition, begin by clicking on **Contracts Management – CMUPCM** on your **Schools / Departments Tab**. Please ensure that your source document provides the Budget Account Number, Vendor Name, Ship to address and any special notes.

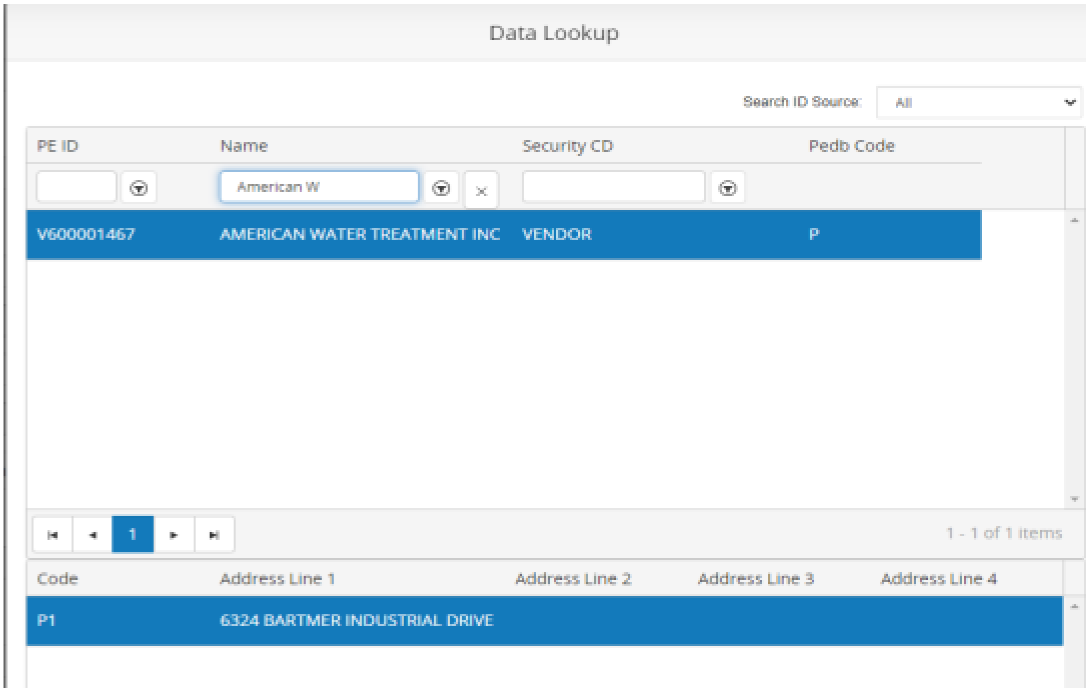
2. Click on the **+ Icon** at the top of the screen to bring up a contract management – entry screen 

3. On the "**Contract No:**" field, Click on the  **lighting bolt**, select **CONTNUM** and document your Contract No:

4. In the "**Contractor ID**" field enter the Contractor ID Number or look up the Contractor ID number by clicking on the  icon and selecting Lookup Ctrl+L

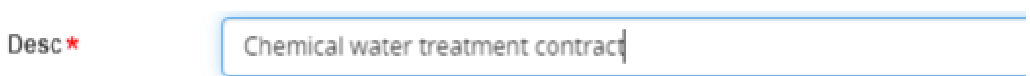
5. Enter a portion of the Contractor's name and press **Enter** (it is not necessary to enter full name). The system will display names matching the characters entered. Select the appropriate ID by highlighting it and clicking OK. Double clicking will also pull the ID back into the record.

6.

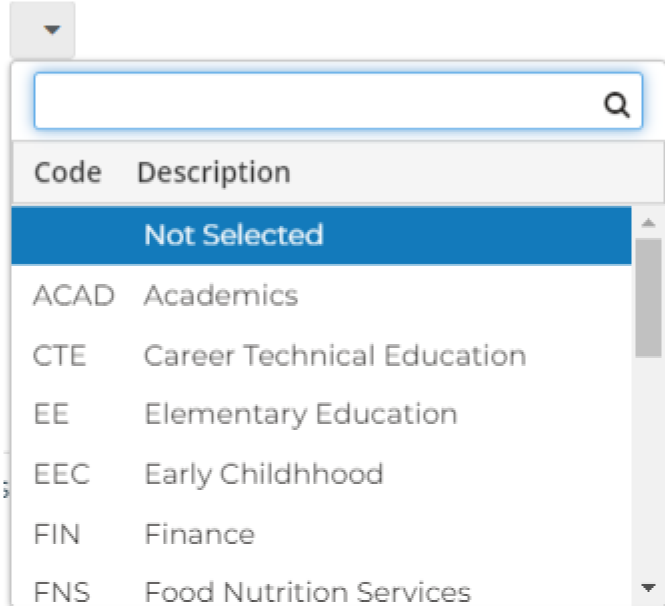


7.

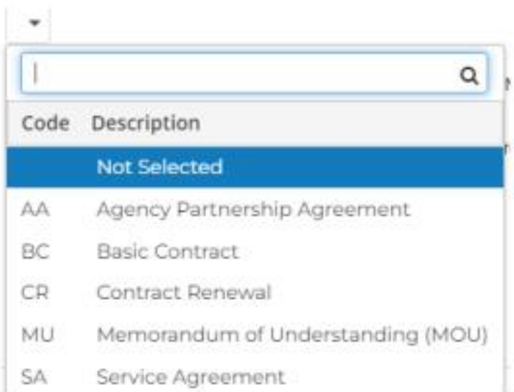
8. In the "**Desc:**" field enter a brief description of the contract.



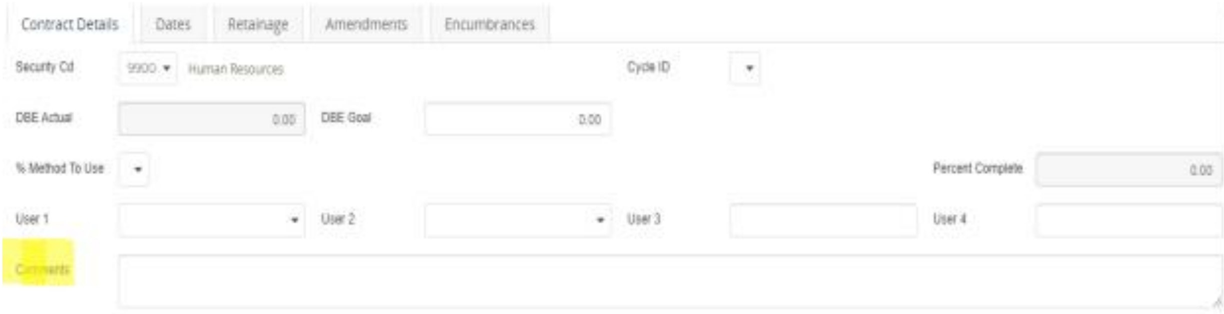
9. In the Manager* field clicking on the Dropdown button and select the Department that is responsible for managing the contract:



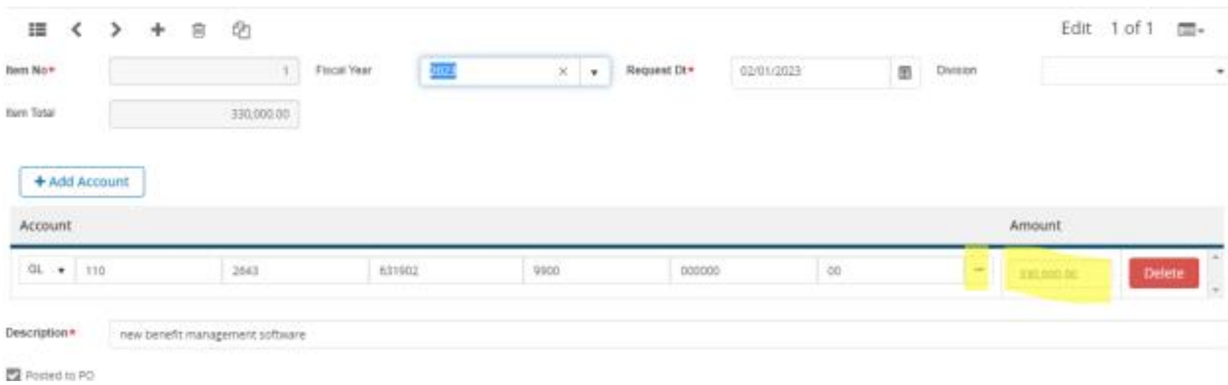
10. In the In the Type* field clicking on the Dropdown button and select the appropriate type of contract:



11. In the “**Original Amt**” enter the total dollar amount of the contract
12. In the “**Begin Dt**” field, enter the beginning date of the contract
13. In the “**Current End Dt**” field, enter the end date of the contract
14. Enter the “**RFP/Bid No:”** field, if applicable
15. On the **“Contract Details”** tab on the “**Comments”** field, enter contract details

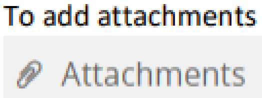


16. On the "**Encumbrance**" tab, click on the  ellipsis button and select "Lookup Account" to search for your specific line item account

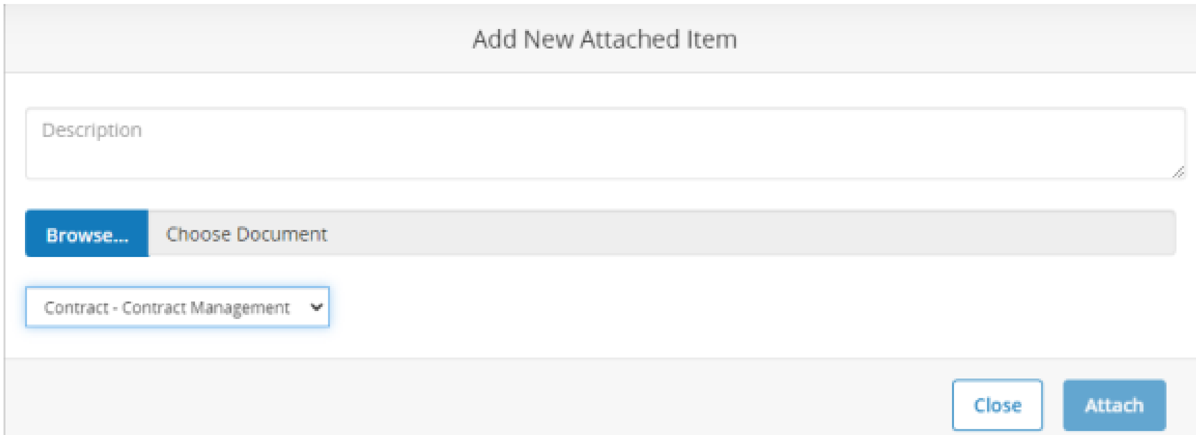


17. Populate the applicable fields for the account you are using, and click **Ok.** A list will appear of account numbers for your department. Double click on the appropriate Account to have the system bring it up onto the Encumbrance tab.

18. In the **Description Field**, enter a Description that identifies the purpose of the Contract. **This Description will populate the Description Field on the Purchase Order**. In the **Amount Field**, enter the amount of the Contract.

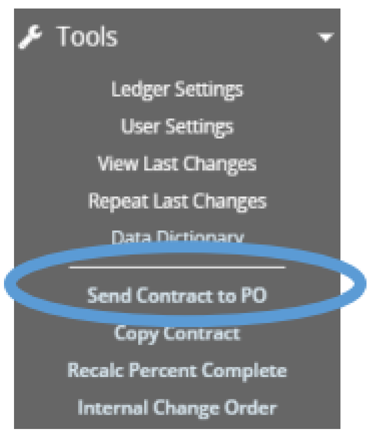
19. To add attachments such as a "Contract" and / or "Letter to Proceed", click on the 

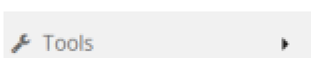
tab, on the left side panel of the screen. Click on "**Add Attachment".** The "**Attachment Dialog"** box will appear, enter a Description in the **Description Field**. Click on **Browse**, Select your Document, Click on **Attach**.



******Press Enter to save Contract to get "Record Accepted" message******

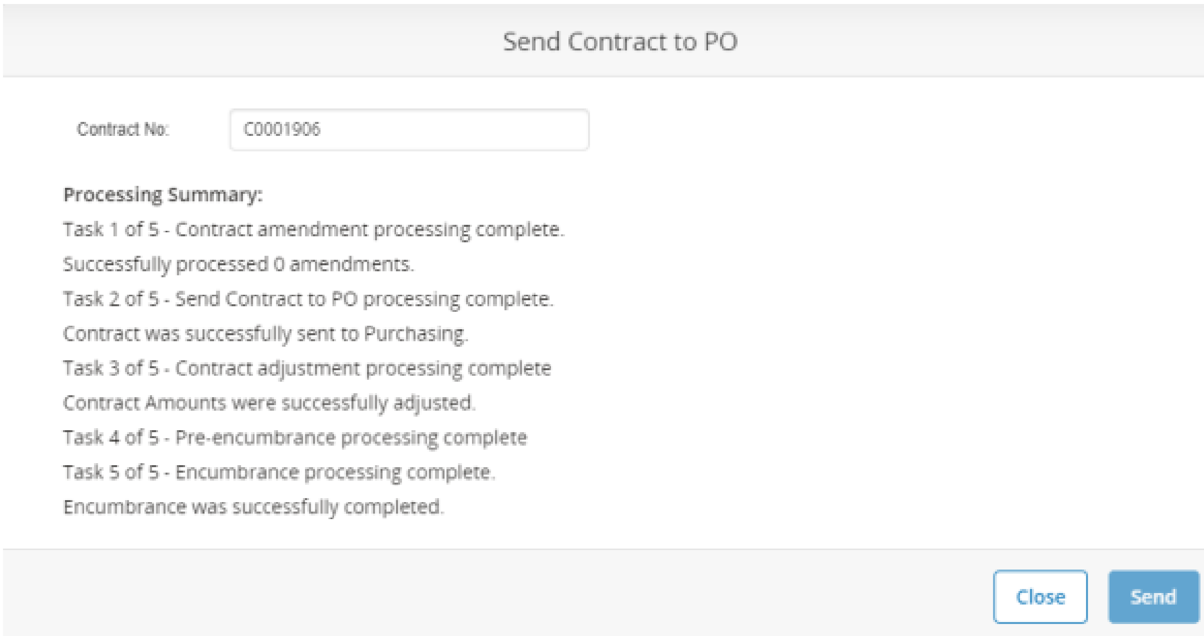
20. Once you have entered all information for the contract press, click on the





tab. Click on "**Send Contract PO"** and click "**Send**"

21. You will see the below message if the job ran successfully:



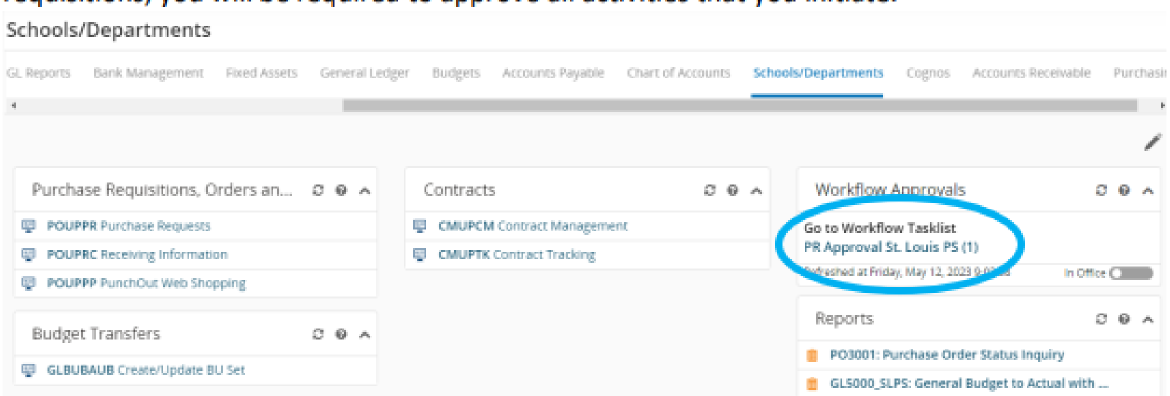
22. Once the contract is successfully sent to a PO, the contract requisition is routed through the Workflow System. You <u>**must**</u> log into the "Enter Purchase Requisition – POUPPR" screen to approve the contract from the workflow tab

> **Please Note: If the contract is not approved in the requisition screen, it is not processed, and a Purchase Order will never be generated!**

STEP 2

<u>WORKFLOW APPROVALS FOR CONTRACTS THROUGH "POUPPR" SCREEN</u>

1. Begin by logging into BusinessPlus, click on the ***Schools/Departments*** Tab. Under ***Workflow Approvals***, Select ***PR Approval*** . Please note: if you have the ability to initiate and approve requisitions, you will be required to approve all activities that you initiate.



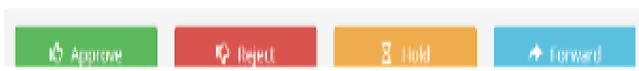
1. The pending requisition will be listed in the workflow click on "***Go to Workflow Tasklist***" in the Workflow Approvals box as pictured above. To view details of a transaction click anywhere on the gray box(s)

   to expand and see the detailed information for that Purchase Requisition.

2. Slide the button  on the right to select the activity for approval.

3. To respond to the pending activity, select either of the following icons and submit:
   a. ***Green bar*** = Approve
   b. ***Red bar*** = Reject

2. Once the requisition is completely approved, a PO will be generated and sent to the vendor. The PO is then attached to the requisition in BusinessPLUS