

A contract is a legally binding agreement between two or more parties which is enforceable by law. Only an authorized representative from Central Purchasing can sign a contract on behalf of Columbia. This job aid details the steps for submitting a Contract Request. Approval of a request does not mean that a contract is created. Once a Contract Request is approved by the Purchasing team, the contract creation process begins.

Refer to the [Submit a Contract Request](#) webpage for more information on the Contract Request process.

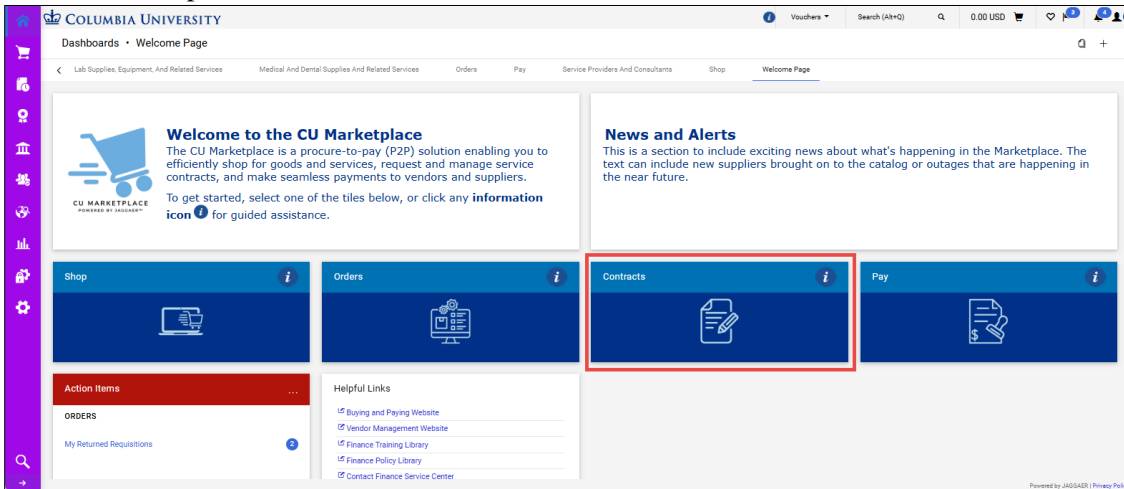
Accessing the CU Marketplace and Initiating a Contract Request

You should gather all relevant information about your contract request, including vendor names and addresses, contract dollar amounts, and any supporting documentation files you will need to upload, such as quotes/proposals, proof of insurance, or draft contracts from vendors. If you are requesting a Contract for Use with a PO, initiate a Goods and Services Request first.

1. Navigate to the [Procurement Buying](#) website, click the **CU Marketplace** logo, and login using your Single Sign On.

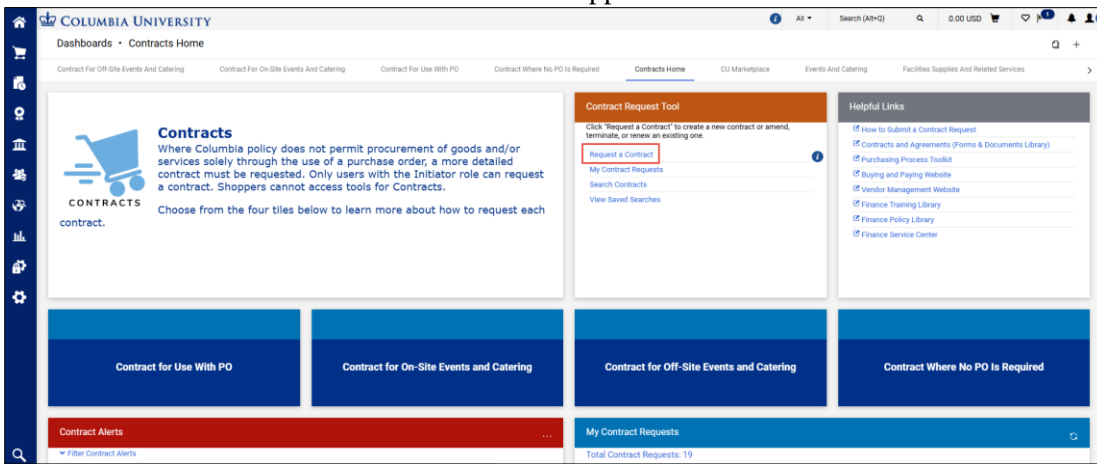


The CU Marketplace launches.



Note: The CU Marketplace will automatically timeout after thirty minutes of inactivity, consistent with other University Enterprise Systems.

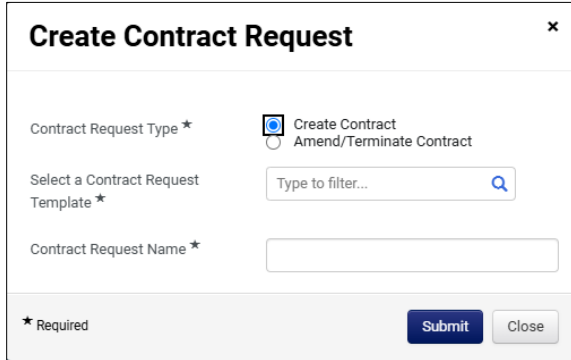
2. Click the Contracts tile. The Contract dashboard appears.



If you need further instruction on the type of Contract you are requesting, click the tile for that Contract type.

3. In the Contract Request Tool tile, click **Request a Contract**.

The Create Contract Request window appears.



4. **Select a Contract Request Template** depending on the type of contract you are requesting:

- Contract For Use with a PO
Note: *Initiate a Goods and Service Request first before initiating a Contract Request for Use with a PO.*
- Contract With No PO Required
- Contract for Offsite Events & Catering
- Event Related Onsite Contract

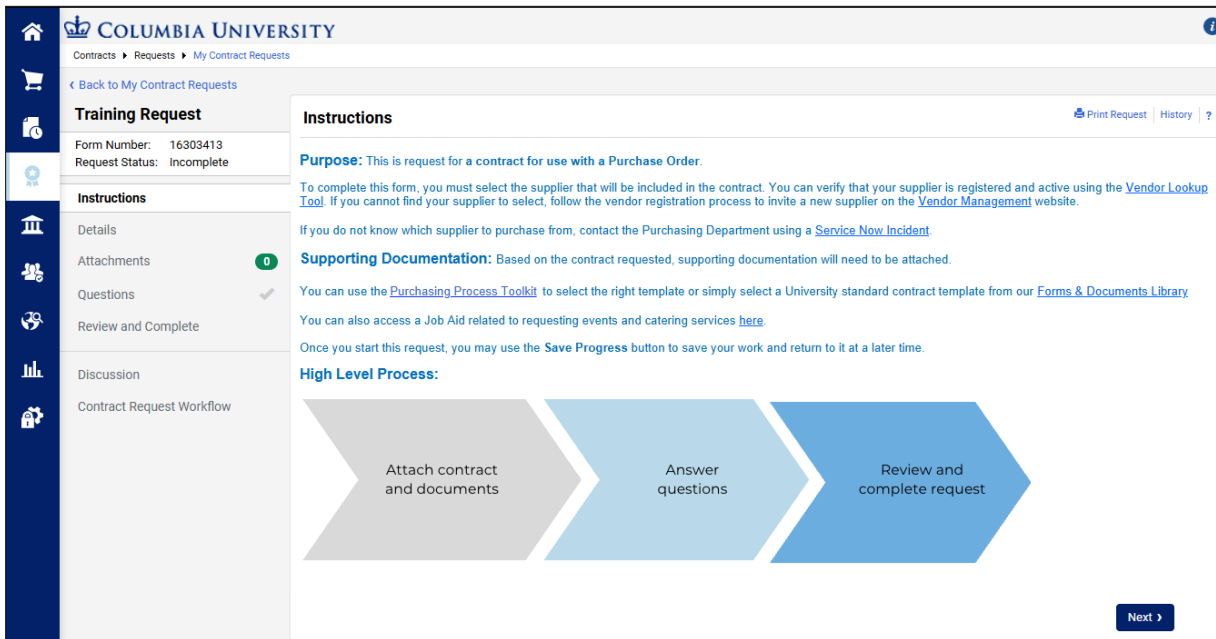
You can click the **Search**  icon to view **Descriptions** to assist you with making the correct selection.

5. In the **Contract Request Name** field, enter the name of the supplier and the contract type.



6. Click **Submit**. The Instructions screen appears.

Completing the Contract Request



Be sure to read the instructions. Instructions differ based on type of Contract Request selected.

Click **Next**. The Details screen appears.

COLUMBIA UNIVERSITY
Contracts > Requests > My Contract Requests

< Back to My Contract Requests

Training Request

Form Number: 1071034
Request Status: Incomplete

Instructions

Details

Contract Request Name *

Template: Contract With No PO Required

Contract Type: -

Description: Contract with legal commitments of the university, but with no up front financial obligation. Examples include: Power of Attorney, Memorandum of Understanding, Writer, Publishing Agreements.

Contract Request Type: Create Contract

< Previous **Save Progress** Next >

You can edit the Contract Request Name, if desired. Click the **Next** button and the Attachment screen appears.

Uploading Attachments

COLUMBIA UNIVERSITY
Contracts > Requests > My Contract Requests

< Back to My Contract Requests

Training Request


Form Number: 1071034
Request Status: Incomplete

Instructions

Attachments

Add Attachments

< Previous **Next** >

1. Click the **Information**  icon in the Attachments section. This will link to information about the required documentation you must attach to your request. Before adding your attachments, save your files with the name that reflects the document you are attaching (i.e., Contract, Scope of Work, Certificate of Insurance, etc.).
2. Click the **Add Attachments** button. The Add Attachments window appears.

Add Attachments

Attachment Type File Link

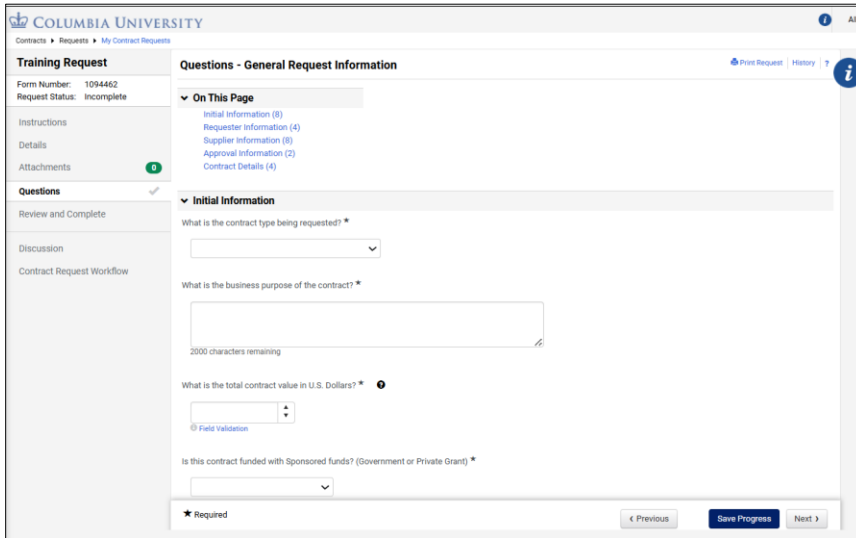
File * Drop files to attach, or browse.


Max. File Size: 50.0 MB

* Required **Save Changes** Close

3. You can **Select Files** or you can **drag and drop** your files. Multiple files can be selected.
4. Click the **Save Changes** button after uploading all required files.
5. Click **Next**. The Questions screen appears.

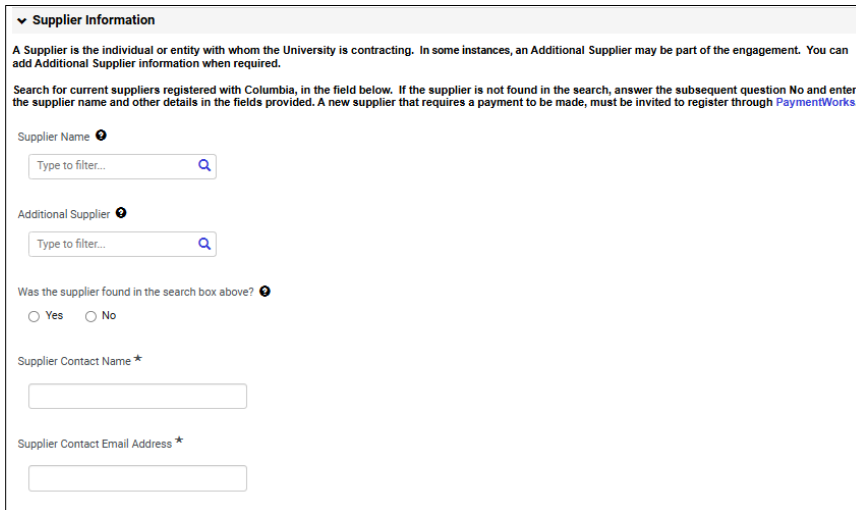
Completing General Questions



You must answer all questions on the form with an asterisk *. If you are unsure of how to answer a question or complete a field, look for the Question  icon next to the question for more information regarding that field.

For additional assistance, click the **Information**  icons to the right of the form to launch a guide.

Completing Supplier Information



- If the Supplier is registered as a Columbia Supplier, you can search and select them in the **Supplier Name** field. You can also search and select an **Additional Supplier** if they are to be included on the contract.
- If you cannot find the Supplier in the Supplier Name field, answer **No** to the **Was the Supplier Found?** question. Then answer the question for **Will a payment be made to the Supplier?** If you plan on making a payment to the Supplier and they are not already registered as a Columbia supplier, you must invite them to register via [PaymentWorks](#). Click the **checkbox** that appears if you have already done so.
- Manually enter the **Supplier Name and other information** as required if you did not find the Supplier.

Completing Contract Details

Contract Details

Start Date *

mm/dd/yyyy

Update Start Date Upon Execution

End Date *

Expires On Term

If you have communicated with CU Purchasing regarding this contract, with whom did you communicate?

2000 characters remaining

Provide any additional details about this request.

2000 characters remaining

★ Required

[Previous](#) [Save Progress](#) [Next](#)

1. Enter a **Start Date** for the Contract.
2. When selecting the Contract **End Date**, select **Expires On** to enter a specific end date. Do not select Term. You do not need to complete Auto-Renew, Renewal Term, and Renewals Remaining. Leave these fields blank.

Submitting Your Request

1. Click **Next** at the bottom of the Questions page. The Review and Complete page appears.

COLUMBIA UNIVERSITY

Contracts > Requests > My Contract Requests

[Back to My Contract Requests](#)

Training Event

Form Number: 898647
Request Status: Incomplete

Instructions
Details
Attachments
Questions

Review and Complete

Discussion
Contract Request Workflow

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](#)

2. Click the **Complete Request** button and click **Yes** in Confirm window.

Confirm

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

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

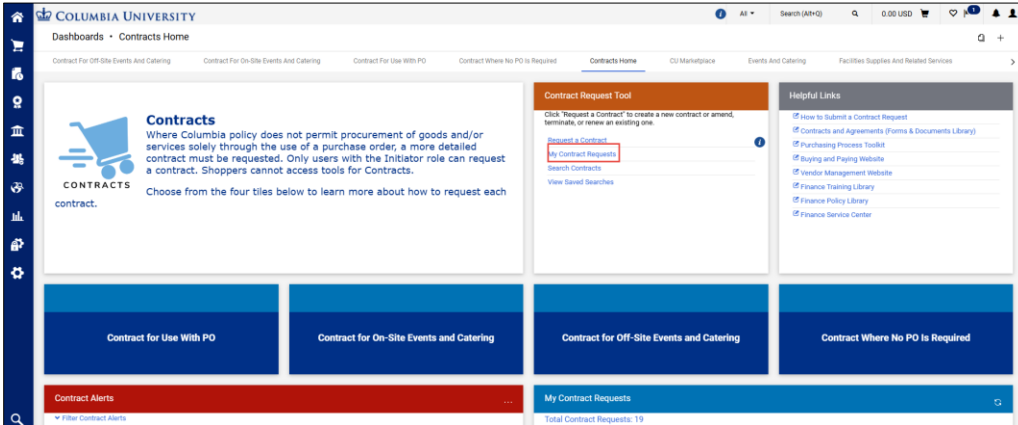
Note: The Contact Request goes to the Purchasing Team for review and approval, there is no departmental approval in the approval workflow.

Viewing My Contract Requests

You can view the status and access your Contract Requests using the Contract Requester Dashboard. If you need to continue working on, edit, a Request that you have not completed, you can do so here.

To edit a Contract Request that you have submitted, you can send a message to the Central Purchasing team in the Discussion section of the request.

From the Contract Request Tool tile on the Contracts dashboard, click **My Contract Requests**.



The My Contract Requests screen appears.

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Actions
Training Event	Contract Request	Eric Zaretsky	Approved	-	-	2/13/2024 3:38 PM	2/13/2024 1:00 PM	Actions
Trainers Event	2024 Request Template 3	Eric Zaretsky	Approved	-	-	1/12/2024 2:06 PM	1/10/2024 12:10 PM	Actions
another test	Contract Request	Eric Zaretsky	Under Review	Request Approval	-	3/18/2024 1:00 PM	3/18/2024 11:20 AM	Actions

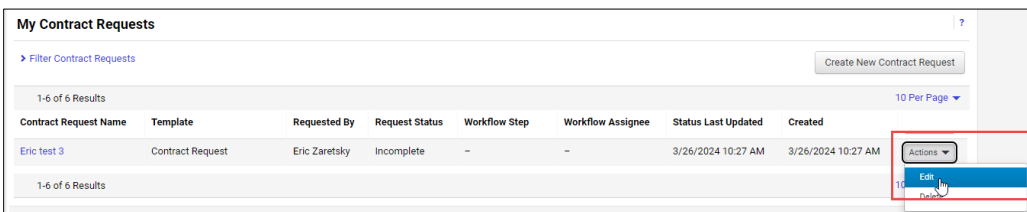
Contract Request Statuses

Request Status	Description
Incomplete	Your Contract Request form is not complete. You can access it to edit, delete, or submit.
Under Review	You submitted your Contract Request and it is under review by Central Purchasing.
Returned	Central Purchasing has returned your Contract Request for you to edit or add additional information.
Approved	Central Purchasing has approved your Contract Request. The contract creation process is in progress.
Rejected	Central Purchasing has rejected your Contract Request, it is inactivated and cannot be edited or re-submitted.
Completed	The has been created and is complete.

Editing an Incomplete Contract Request

You can edit, complete, and submit a Contract Request that has a status of Incomplete. If you need to edit or delete a Contract Request that you have already submitted that has a status of Under Review, see the section below on Editing or Deleting a Contract Request Under Review.

In the row for the Incomplete Contract Request to be edited, click the **Action** dropdown and select **Edit**.



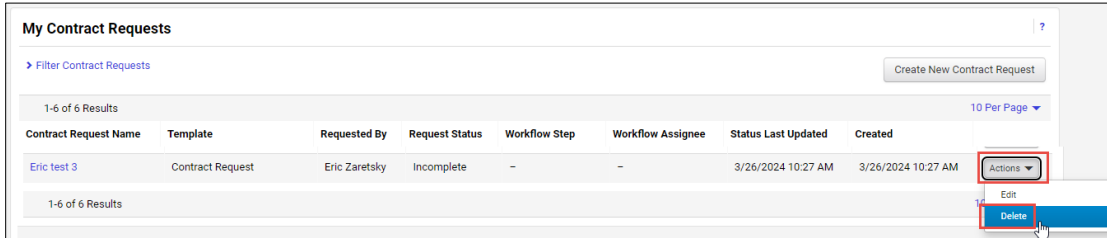
The Instructions page for the Contract Request appears.

You can navigate to the desired page to edit. After entering all required fields, review and complete the request.

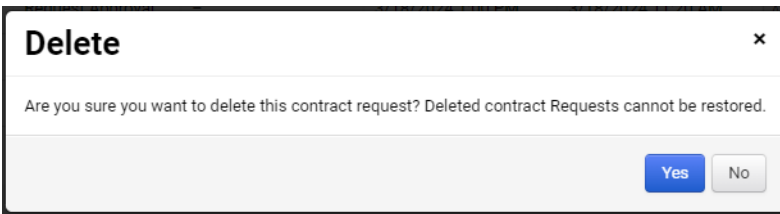
Deleting an Incomplete Contract Request

You can delete a Contract Request that has a status of Incomplete. If you need to edit or delete a Contract Request that you have already submitted that has a status of Under Review, see the section below on Editing or Deleting a Contract Request Under Review.

In the row for the Incomplete Contract Request to be edited, click the **Action** dropdown and select **Delete**.



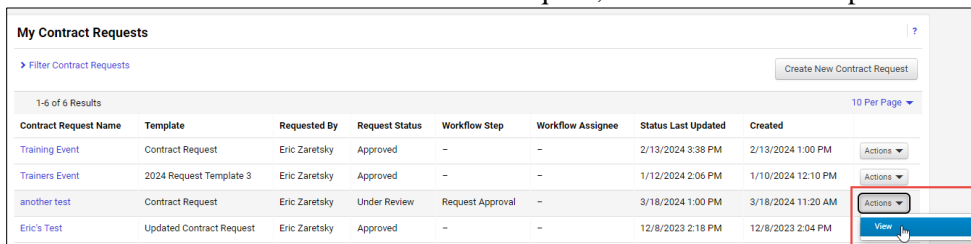
The Delete confirmation appears. Click **Yes** to complete the deletion.



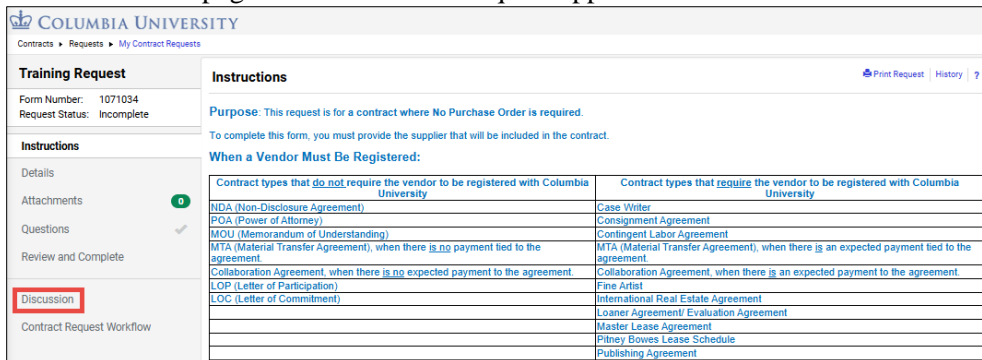
Editing or Deleting a Contract Request Under Review

Once your Contract Request is submitted and has a status of Under Review you cannot edit or delete it directly from your list. If you need to edit or delete a Contract Request that has a status of Under Review, you can view the Contract Request and post a message in the Discussion section of the request to the Central Purchasing team requesting to have the request returned. After the Contract Request has a status of Returned, you can edit or delete it.

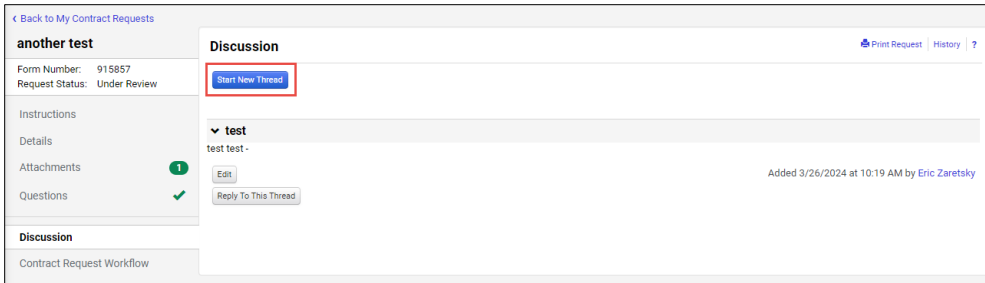
1. In the row for the Under Review Contract Request, click the **Action** dropdown and select **View**.



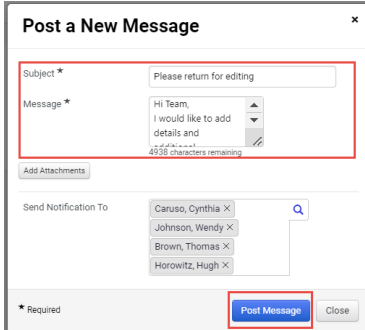
The Instructions page for the Contract Request appears.



2. Select the **Discussion** page. The Discussion page appears.



3. Click the **Start New Thread** button. The Post a New Message window appears.



The **Send Notification To** section is automatically populated with the names of the Purchasing team.

4. Enter a **Subject** and **Message** to the Purchasing team asking them to return your request.
5. Click the **Post Message** button.

Getting Help

Please contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now

<https://columbia.service-now.com>