



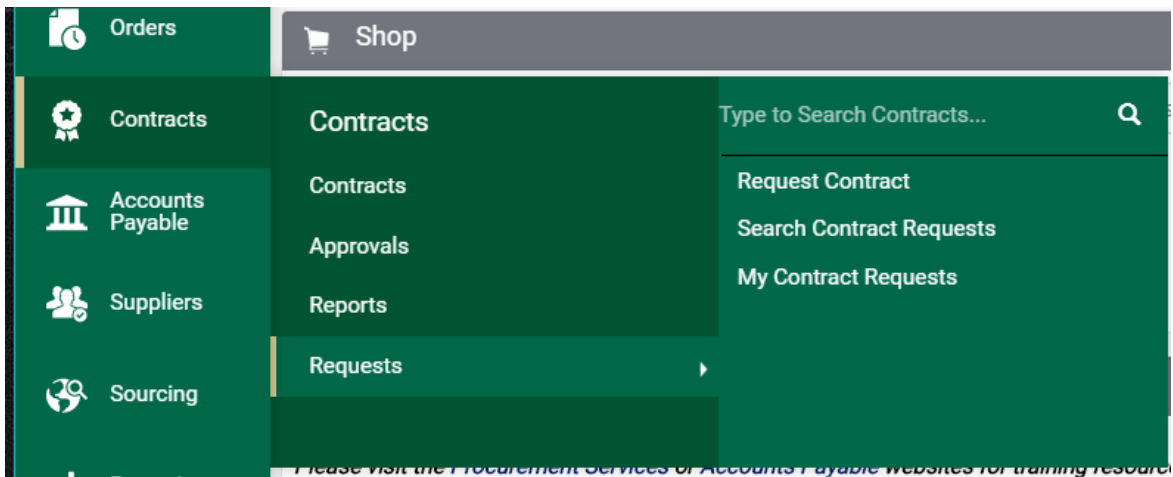
Bull Marketplace – Contracts+ Job Aid

Tutorial: Contract Request

Purpose:	This section outlines the steps necessary to create a Contract Request for review and approval.
Navigation:	Navigate in Bull Marketplace > Contracts >Requests > Request Contract
Notes:	Only Requestors and Approvers can submit a Contract Request. If an Approver submits, another Accountable Officer needs to be identified as the Contract Approver.

Steps	Section Header
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- 1 In the flyout menu > Go to Contracts > Requests > Request Contract



- 1.1 You will be prompted to name your Contract Request > then click Submit

Create Contract Request ×

Contract Request Name ★

Select a Contract Request Template ★

★ Required

NOTE: The Contract Request Name will not become part of the Contract Record. This will reside in the Contract Request field only. There is no specific naming convention. User can name it however he/she wants it to be.

Contract Request Template: USF Contract Request Form

Steps	Section Header
2	For easy navigation, we suggest that you let the wizard walk you through the process. Click "Next" below.

Shop | < Back to My Contract Requests

Test contract

Form Number: 442208
Request Status: Incomplete

Instructions Print Request | History | ?

Please add your main contract document and all other relevant documents in the Attachments section. When responding to questions, if a response required a document upload, please make sure they are in the Attachments section. Contract Requests missing required documents will be returned to the submitter.

Instructions

- Details
- Attachments 0
- Questions ✓
 - Header Information ✓
 - Departmental Information ✓
 - Background Information ✓
 - Supplier Contact Informat... ✓
 - Funding Information ✓
 - Sourcing Information ✓
- Review and Complete
- Discussion
- Contract Request Workflow

Next >

2.1 Details

< Back to My Contract Requests

Test contract

Form Number: 442208
Request Status: Incomplete

Instructions

Details

- Attachments 0
- Questions ✓

Details

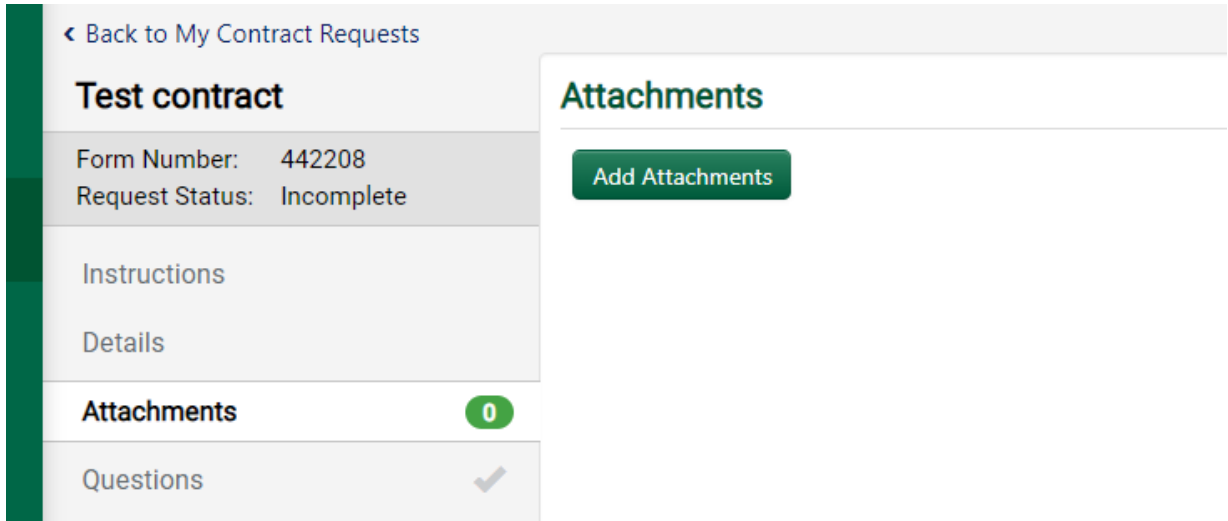
Contract Request Name *

Template USF Contract Request Form

Contract Type -

Description -

2.2 Click “Next” again and it will take you to the Attachment field.



Here you attach your documents (re: Supplier contract, Independent Contractor Worksheet, Primary quote, competitive quotes, and additional information) for Purchasing to review.

NOTE: Attach each document in separate files.

If you happened to attach the wrong attachment, you have the option to delete it.



Steps	Section Header
3.	Questions – this section is where you input most of the information regarding this contract request (re: Primary contact; Department Approver; Supplier Information, etc)

3.1 Header Information

Questions - Header Information

▼ **Header Information**

Contract Name ★ ⓘ

Contract Name –the contract name can be the Supplier’s Business name or certain Keyword that will make your contract easily searchable. This information will become part of the Contract Record and can be used as search criteria.

Summary ★ ⓘ

No Text Entered

Click here to add a Summary

Summary – is a short description regarding the commodity or services outlined in the Contract Request Form.

Supplier - select the Supplier from our Supplier database

Supplier ×

[More Options](#)

Name	Select
CADENCE DESIGN SYSTEMS INC ⓘ	<input type="button" value="Select"/>

Selected Value

In the event the Supplier is not in the system you will be redirected to complete a New Supplier Request.

Job-aid VO New Supplier

Form Number: 444494
Request Status: Incomplete

Instructions
Details
Attachments 1
Questions ✓

Header Information ✓

Departmental Information ✓
Background Information ✓
Supplier Contact Informat... ✓
Funding Information ✓
Sourcing Information ✓

Questions - Header Information

▼ **Header Information**

Contract Name * ?

Summary * ?
No Text Entered


Supplier * ?

No results found.

Additional Second Parties ?

Additional Second Party – this is an optional field. University of South Florida is the First Party. The Supplier is the Second Party. You complete this section if there is a Third Party associated to the contract. If none, leave it blank.

Start Date ★ ?




mm/dd/yyyy

Update Start Date Upon Execution ?

End Date ★ ?

Expires On No Expiration

Total Contract Value ★




Start and End Dates – this information can be found in the contract document. If no specific start date provided it is presumed the contract will start upon execution so, check off the box “Update Start Date Upon Execution”. Make sure you enter the Total Contract Value. Click “Save Progress” or “Next” to go to the next field.

Steps	Section Header
3.2	Department Information

▼ Department Approving Officer Information

USF Department ID & Name ★ ?

 Field Validation

Department Approving Officer Name ★

Department Approving Officer Email ★

USF Department ID & Name – it should be the six-digit Dept ID followed by a space, followed by a dash, followed by another space, and the Department name (Example: 21600 – Electrical Engineering)

▼ **Primary Contact**

Primary Contact Name *

Primary Contact Email Address *

Primary Contact – this can be anyone that the department wants to be the main point of contact for this Contract Request.

▼ **Other Stakeholders**

Are there any other USF employees that need to view this contract and receive notifications about it? *

Yes No

Please upload the list of USF stakeholders. * ?

I confirm that I have attached a list of names and emails for all relevant USF stakeholders to the Attachments section.

Other Stakeholders – if answered “Yes” you will be prompted to attach a list of stakeholders. Check off the box and upload the list in the Attachment section (Step 2.2)

Steps	Section Header
3.3	Background Information

Questions - Background Information [Print Request](#) [History](#) [?](#)

▼ **Background Information**

Please check all appropriate boxes *

<input type="checkbox"/> Construction or Renovation of Tampa grounds/buildings	<input type="checkbox"/> Services Provided by an Independent Contractor	<input type="checkbox"/> None of the Above
<input type="checkbox"/> Use of a USF Logo	<input type="checkbox"/> Non-standard technology requiring UTSB approval	

NOTE: Some purchases require additional approvals prior to purchase. These approvals should be obtained and attached to the Contract Request submitted to Purchasing for review.

3.4 Supplier Contact Information

These are all required fields. Make sure you provide Information for each field.

3.5 Funding Information

▼ Funding Source

Please select the anticipated funding source for this contract ★

<input type="checkbox"/> Educational & General	<input type="checkbox"/> Auxiliary (Alternate Instruction)	<input type="checkbox"/> Sponsored Award	<input type="checkbox"/> Payment by Third Party
<input type="checkbox"/> Flat/Credit Hour Fees	<input type="checkbox"/> Concession	<input type="checkbox"/> Convenience	<input type="checkbox"/> Foundation or Other DSO
<input type="checkbox"/> Auxiliary (Educational Business Activities)	<input type="checkbox"/> Research Initiative	<input type="checkbox"/> No-Cost Contract	<input type="checkbox"/> Other

Select the appropriate funding source to be used to accomplish contractual obligations.

3.6 Sourcing Information

Our requirements for competitive solicitations can be found on our website. Generally speaking, we require competitive quotations from alternative suppliers if the total purchase exceeds \$5,000. There are variety of exemptions from our quote requirements, but these must be properly documented so your Procurement Agent can review them.

▼ Sourcing Information

How is this purchase being sourced? ★

- USF Public Solicitation (ITN/ITB)
- Competitive Quotations
- Emergency Purchase
- Single/Sole Source
- Non-USF public competitive solicitation
- Policy Exemption
- Extension/Renewal of Existing Contract
- Order under \$5,000, competition not required

Steps	Section Header
4	Review and Complete

← Back to My Contract Requests

Contract job-aid VO

Form Number: 444388
Request Status: Incomplete

Instructions
Details
Attachments **1**
Questions ✓
Header Information ✓
Departmental Information ✓
Background Information ✓
Supplier Contact Informat... ✓
Funding Information ✓
Sourcing Information ✓

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
Header Information	✓ Required fields complete
Departmental Information	✓ Required fields complete
Background Information	✓ Required fields complete
Supplier Contact Information	✓ Required fields complete
Funding Information	✓ Required fields complete
Sourcing Information	✓ Required fields complete

★ Required

← Previous

Complete Request

Click here to submit

Confirm

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

Yes No