NYU

Contracts+ Tip Sheet

Navigating the Contracts+ Module in iBuy

Overview

This guide will walk you through the key features of the module, including how to search for contract records, view your dashboard to track progress, and additional features on the form. By understanding the module's layout and tools, you'll be able to efficiently manage your contracts while ensuring compliance with University policies. Use the links below to navigate to the corresponding section.

- Access Contracts+
- Contract Requester Dashboard
- Navigating the Request Form
- Track the Status of Your Contract
- Navigating the Contract Record

Access Contracts+

You can access Contracts+ module in iBuy from the **NYU Home > Work Tab** or search for the i-Buy NYU card at NYU Home.

Once you are logged in you should see the Contracts module from the left-hand menu which allows you to search for contract records and initiate and view your requests. Another option within iBuy is to view your Contract Requester Dashboard.

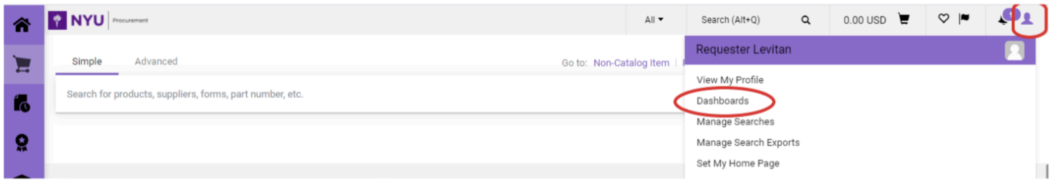
The Contract Requester Dashboard

The Contract Requester Dashboard provides a one-stop shop to:

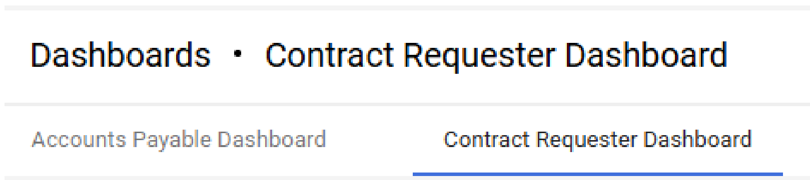
- Initiate Contract Requests, Amendments, and Renewals.
- View and see the status of all of your Contracts+ requests
- Search contracts to which you have access.

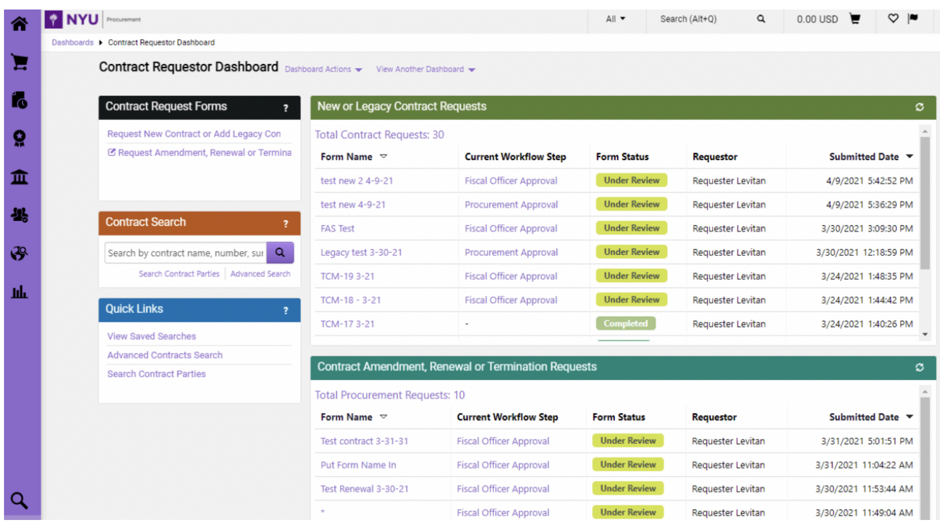
To access the Contract Requester Dashboard,

1. Select the silhouette icon at the top right corner of your iBuy screen and select Dashboards. The system will take you to your most recent dashboard and you can toggle between dashboards to which you have access.



2. If you are not taken to the Contract Requester Dashboard, toggle to Contract Requester Dashboard.



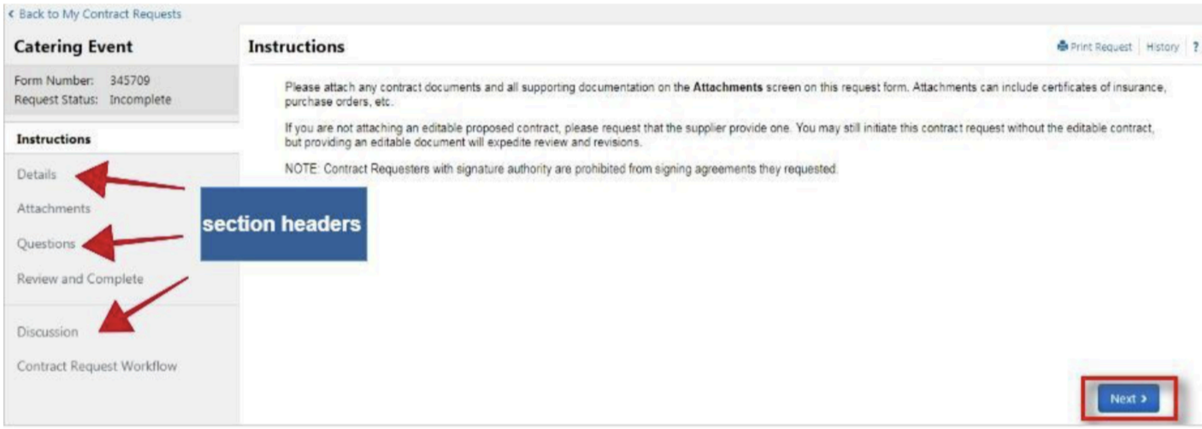


Navigating the Request Forms

There are two available contract request templates available in Contracts+.

- **Travel, Events, and Entertainment Request:** To be used when requesting a contract for an offsite event, entertainers, performers, and travel-related engagements.
- **Standard Contract Request:** To be used for all other contract requests.

You can step through the Request Form by clicking **Next** or by clicking the section/header you want to review.



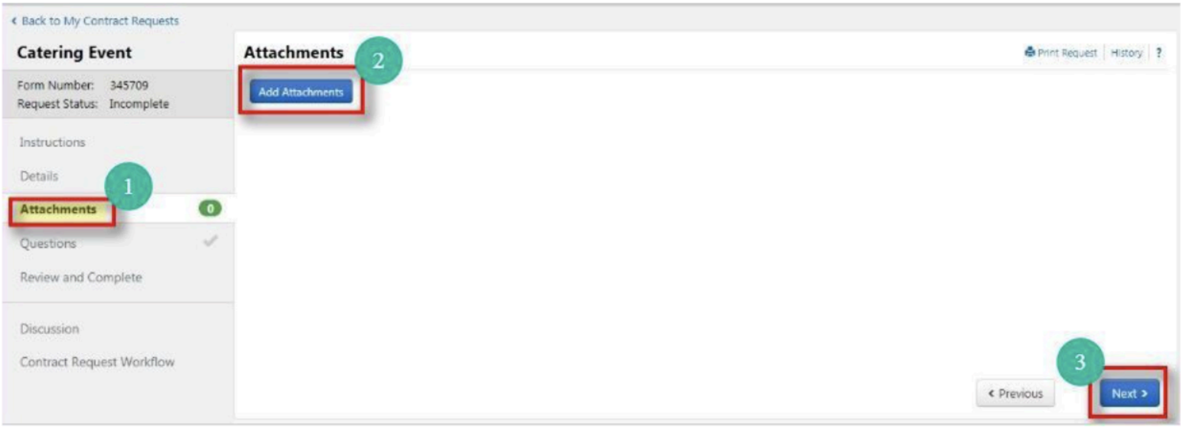
Details Section

The Details section is used to enter the name of a request for an amendment, renewal or termination and may be used to change the name of a request for a new or legacy contract request.

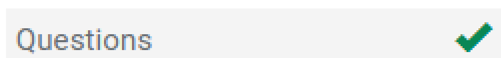
Attachments Section

The Attachments section allows you to upload documents to your request. There is no limit to the number of attachments you upload. Attachments may be Word documents, PDFs, etc. Attachments are not required.

- **Useful attachments include** a detailed Statement of Work, a Certificate of Insurance, the vendor's contract document (if NYU template is not being used), additional correspondence with other NYU TEams (OGC, Risk Management, etc.) that may have reviewed the contract documents prior to submitting a contract request.
    - *Please note:* when attaching the vendor's contract, an **MS Word version** is preferred for editing purposes.
- **For an Event Contract Request**: The template attachments will include a locked form of the current Event Rider and forms of Certificates of Insurance for events with and without liquor. You can download a copy of the Event Rider, complete the needed information, and attach it to the Contract Request.

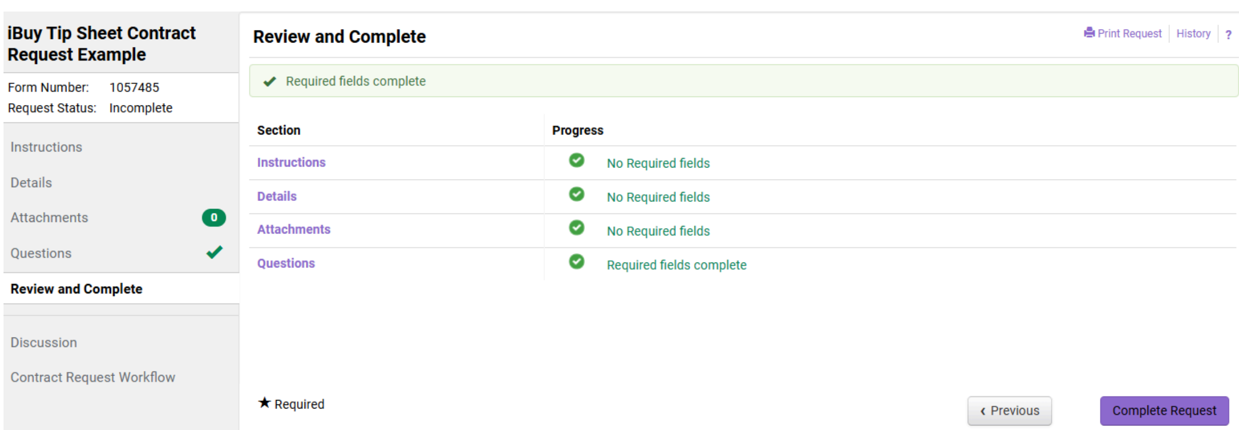


Questions Section

Please make sure to review and respond to each question in this section. Required fields are indicated with a star ★ and once all required fields are complete on a page, a green check mark will appear 

Review and Complete Section

Please make sure that all the information provided is accurate. The green checkmarks under the “Progress” column indicate that all requirements have been met. When ready, submit your request by clicking the **Complete Request** button.



Track the Status of Your Contract

You can track the status of your contract request by navigating to the Contract Requester Dashboard OR navigating to **Contracts > Requests > My Contract Requests.**

Selecting the “Contract Request Workflow” page in your contract request form takes you to the contract workflow page to see what step your request is in. Your view and approval steps will vary depending on your responses in the request form.

Your contract request will reflect one of the following statuses, depending on where it is in the process.

- **Incomplete:** Request form that is still with the requester and has not been submitted for review or approval.
- **Returned:** Request Form Was returned for additional information or document, View the comments and determine what action is needed to resubmit.
- **Rejected:** Request form was rejected and cannot be processed. Example: duplicate contract contract not needed, etc. Review the comments to understand more about why the request was rejected.
- **Under Review:** Request form that has been submitted and is in the queue to be processed/approved.
- **Approved:** Request form that has been fully approved and will be converted into a contract.
- **Completed:** Request form has gone through all the approvals required on the contract request and converted into a draft contract.

What happens once my contract request is approved and shows a status of ‘completed’?

Once a request form has been converted to a contract record by Procurement, it will create a Hyperlink from the request form to the contract document.

Form Number:	1043486
Request Status:	Completed
Contract:	FY2025-000000418

The contract may be in one of the following statuses:

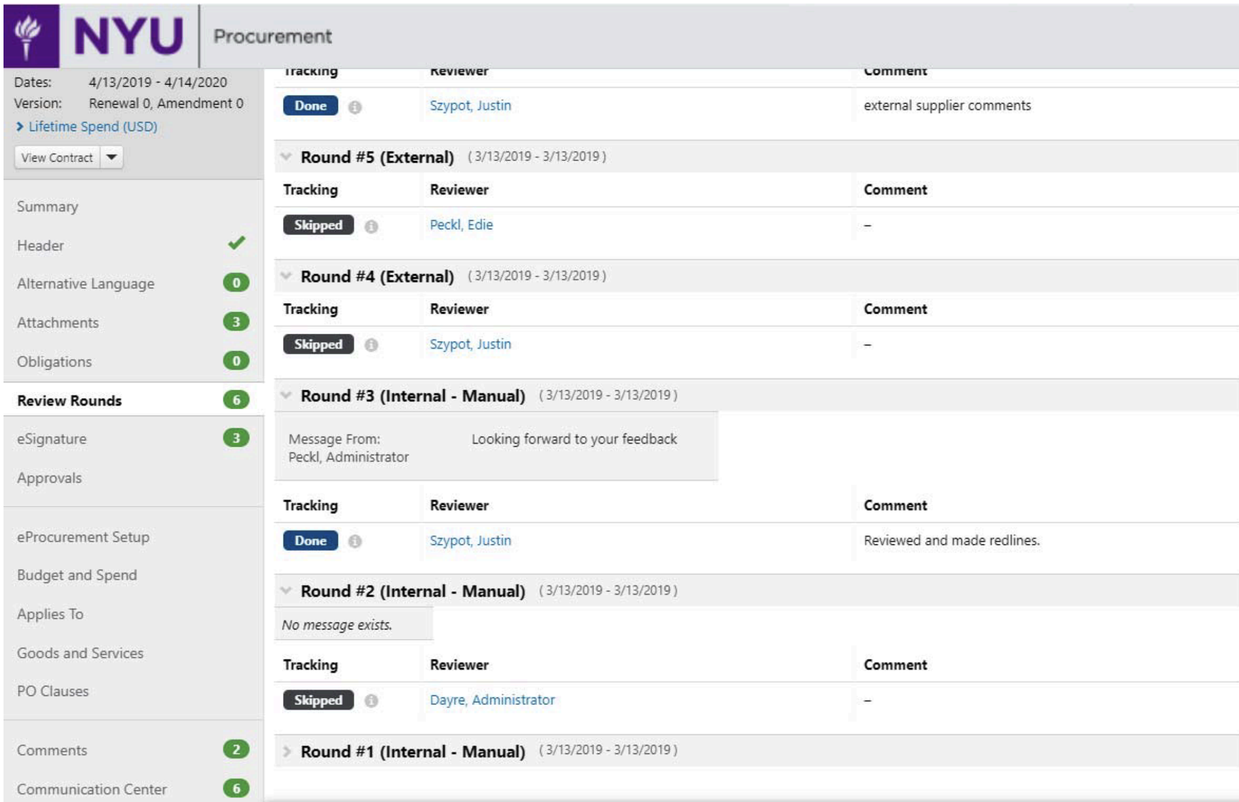
- **Draft:** Procurement is working on preparing the contract documents for negotiation or execution.
- **Internal Review:** This is a draft contract that has been authored but is being reviewed by an internal stakeholder (example, OGC, Risk Management, etc)
- **External Review:** This is a draft contract that has been authored and has been sent for review to any pertinent parties outside of the University i.e., supplier organization for review
- **Out For Signature:** This is a draft contract that all internal and external reviews and approvals have been completed. The contract has been submitted for electronic signature by the Contract Manager
- **Pending Signature:** The contract is out for signature in DocuSign.
- **Executed: Future:** The contract is approved and fully signed, but will not be in effect until its scheduled start date.
- **Executed In Effect:** The contract is approved, fully signed, and active.
- **Complete:** The contract has reached its scheduled end date and all steps required to close the contract are complete.
- **Expired:** The contract is automatically marked as expired once its scheduled end date has passed.
- **Terminated:** The contract has been stopped before its scheduled end date, Termination is used post-execution when terms cannot be reached and the contract will not go forward.

Navigating the Contract Record

How to Check on Review Round Activity

The Review Rounds section of the contract tracks the status of the review. The status can be viewed under **Tracking** for each round.

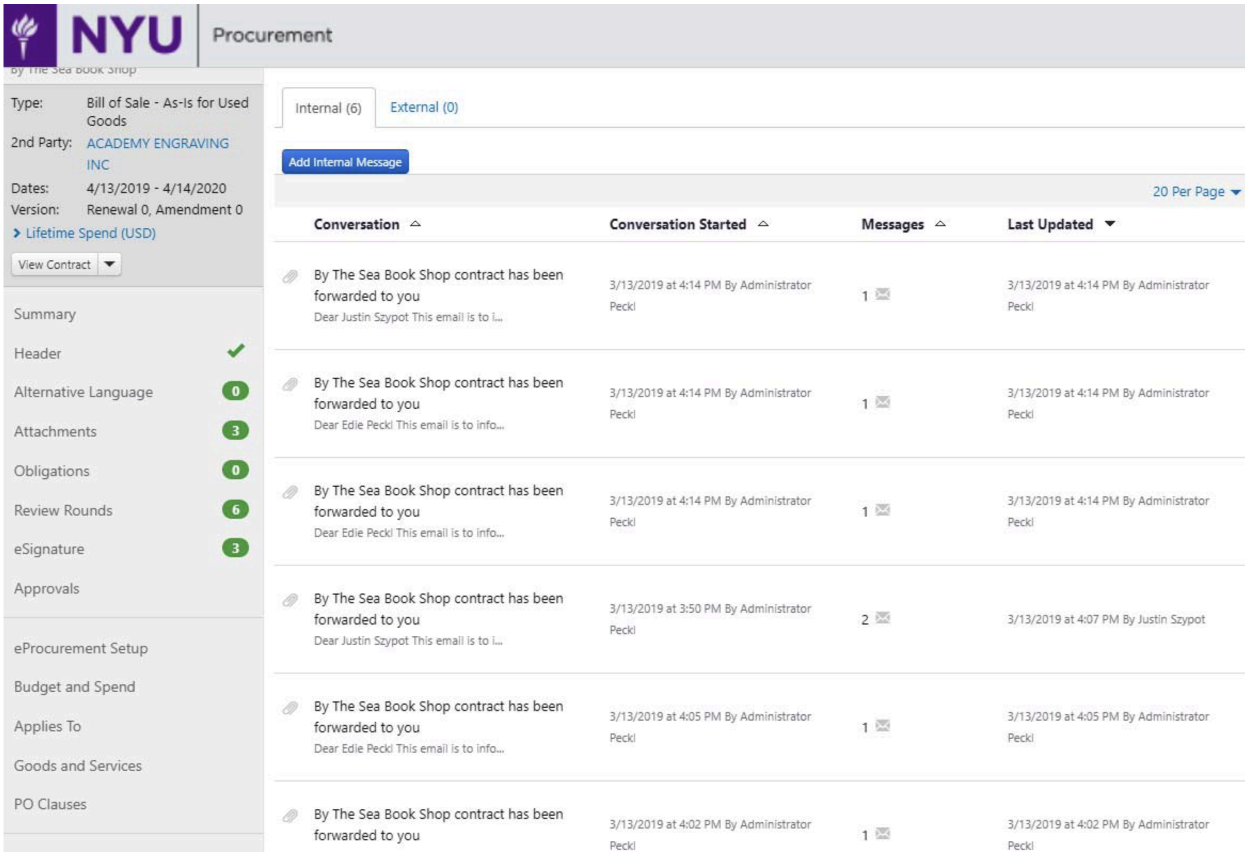
To view, go to the exact **Contract > Review Rounds**



Communication Center

The Communication Center of a contract tracks the correspondence of that contract. The Communication Center is divided into two tabs, **Internal** (Stakeholders conversations) and **External** (Stakeholders conversations).

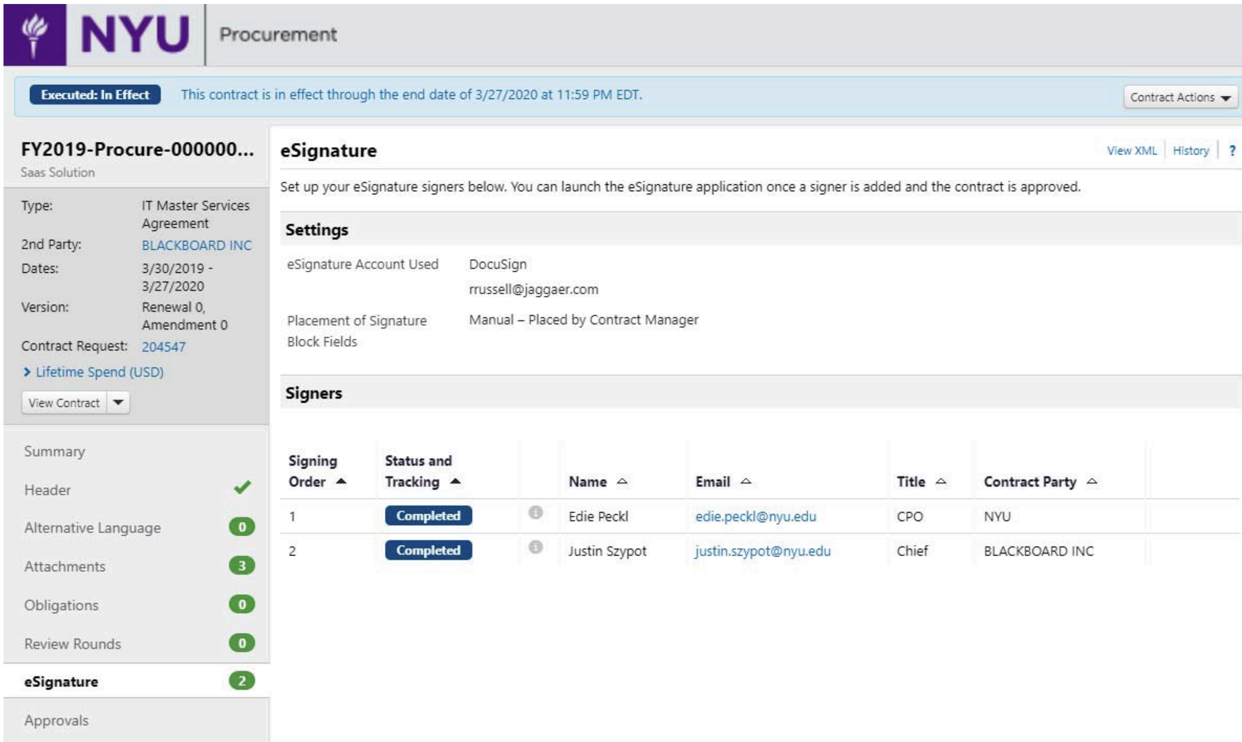
To view, go to the exact **Contract > Communication Center**



eSignature Status

The status of contracts sent for eSignature is displayed in the eSignature section under **Status and Tracking**.

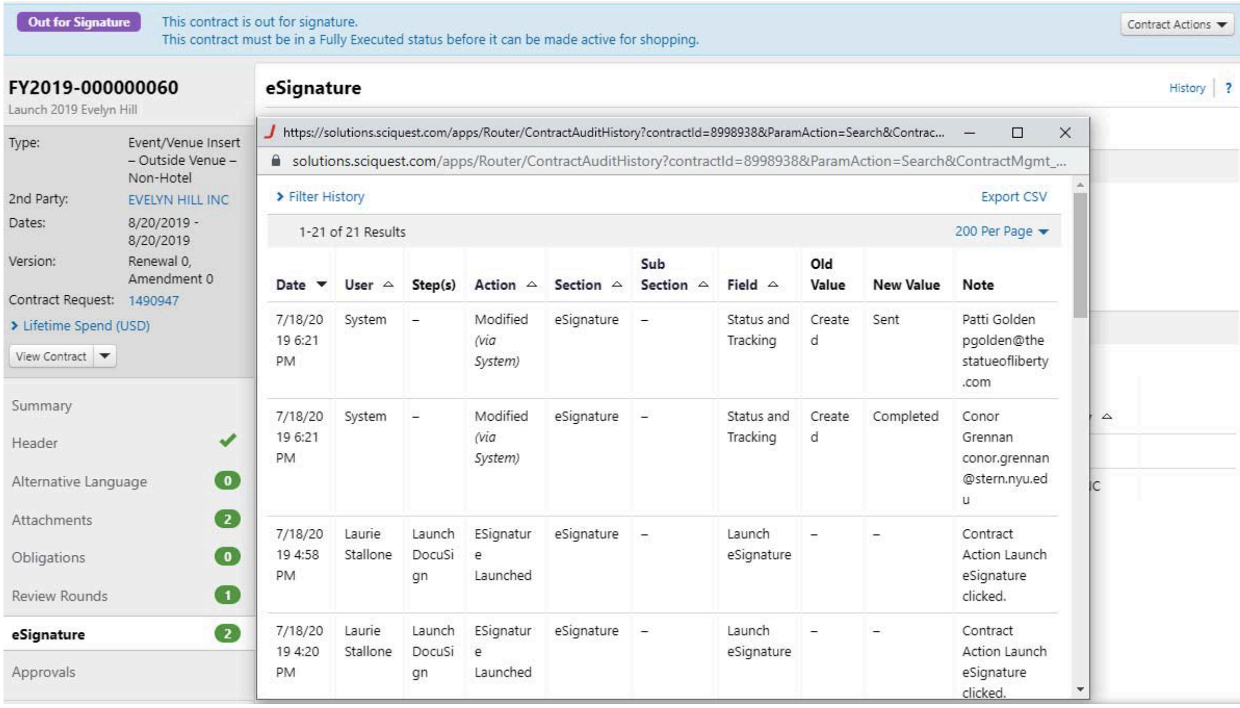
To view, go to the exact **Contract > eSignature**



eSignature History

Selecting History within the eSignature section allows the user to view the entire eSignature history.

To view, go to the exact **Contract > eSignature > History**


Out for Signature
This contract is out for signature.
This contract must be in a Fully Executed status before it can be made active for shopping.
Contract Actions
FY2019-000000060
Launch 2019 Evelyn Hill
Type: Event/Venue Insert – Outside Venue – Non-Hotel
2nd Party: EVELYN HILL INC
Dates: 8/20/2019 - 8/20/2019
Version: Renewal 0, Amendment 0
Contract Request: 1490947
Lifetime Spend (USD)
View Contract
Summary
Header
Alternative Language 0
Attachments 2
Obligations 0
Review Rounds 1
eSignature 2
Approvals
eSignature
History
https://solutions.sciquest.com/apps/Router/ContractAuditHistory?contractId=8998938&ParamAction=Search&Contrac...
solutions.sciquest.com/apps/Router/ContractAuditHistory?contractId=8998938&ParamAction=Search&ContractMgmt_...
Filter History
Export CSV
1-21 of 21 Results
200 Per Page
Date User Step(s) Action Section Sub Section Field Old Value New Value Note
7/18/2019 6:21 PM System – Modified (via System) eSignature – Status and Tracking Created Sent Patti Golden pgolden@thestatueofliberty.com
7/18/2019 6:21 PM System – Modified (via System) eSignature – Status and Tracking Created Completed Conor Grennan conor.grennan@stern.nyu.edu
7/18/2019 4:58 PM Laurie Stallone Launch DocuSign ESignature Launched eSignature – Launch eSignature – – Contract Action Launch eSignature clicked.
7/18/2019 4:20 PM Laurie Stallone Launch DocuSign ESignature Launched eSignature – Launch eSignature – – Contract Action Launch eSignature clicked.