All contract requests should be submitted using the “Contract Request” icon in Viking Shoppes. COMPLETED CONTRACT TEMPLATES SHOULD NOT BE FORWARDED TO NOR SIGNED BY THE VENDOR UNTIL AFTER YOU HAVE BEEN TOLD TO DO SO BY LEGAL AFFAIRS IN THE PR APPROVAL QUEUE # 5 (CONTRACT PREVIEW) STAGE!!!

1. Requestor enters the vendor/supplier’s name. If the vendor/supplier is not in Viking Shoppes, you will need to complete the “New Supplier Request” form. Purchasing will notify you once the vendor has been added.
2. Select the “Type of Contract” and complete the corresponding contract template.
3. Enter the desired start and end date. You should allow at least two weeks for processing.
5. Description – What you enter in this box will feed to Banner
6. Attach the completed contract (without signatures) and any other supporting documentation that will be needed to support your request (purpose of service, quotes, etc.).

Routing Queues – Below is an explanation of each workflow step and the expectation of the person completing the approval.

PR Approval Queue #1: Chancellor’s Direct Report: Approves the necessary contracted service and that the required service cannot be provided by an employee or another state entity.

PR Approval Queue #2: Fund Manager: Certifies funding is available, approves of the expense from the fund, and confirms that the expense is an allowable and necessary expense.

PR Approval Queue #3: Budget/Grants: The expense is allowable.

PR Approval Queue #4: Purchasing Office: Competition requirements have been met. The vendor is not on any of the debarred lists.

PR Approval Queue #5: Contract Preview: Legal Affairs reviews the contract and makes any necessary changes. Once the document is ready for the vendor’s signature, a comment will be sent to the requestor and the contract request will be forwarded to the “Legal Affairs” queue. The requestor should then obtain the vendor’s signature – ONLY AFTER YOU HAVE RECEIVED NOTIFICATION (via comment) FROM LEGAL AFFAIRS TO DO SO and if the contract amount is $1,500 or less, it should also be signed by the respective Vice Chancellor or Chancellor’s Direct Report AFTER THE VENDOR’S SIGNATURE HAS BEEN OBTAINED. The signed contract should then be uploaded into the requisition in Viking Shoppes. After uploading the contract, the requestor should then comment back to Legal Affairs (not to an individual Legal Affairs staff member) advising that the signed contract has been uploaded.

PR Approval Queue #6: Legal Affairs: Once the contract with the vendor’s signature has been uploaded, Legal Affairs will do a final review and approve as long as no modifications have been made to the contract by the vendor.

PR Approval Queue #7: Chancellor/Chancellor’s Designee Signature: Contracts that are fully executed ($1,500 or less) will be automatically approved without further review. However, those contracts over $1,500 will require review, approval and signature by the Chancellor/Chancellor’s Designee.

PR Approval Queue #8: Purchasing Buyer Review: Final review will be completed and a purchase order generated.

ONCE SERVICES HAVE BEEN COMPLETED, A RECEIPT MUST BE CREATED. INVOICES SHOULD BE SENT TO ACCOUNTS PAYABLE.