Completing a Contract Request

Reference Guide for Completing a Contract Request Form

Initial Login
To login, access McGill Marketplace through Minerva.

User Permissions required
FOAPAL Requestor (Sponsored in MMP)

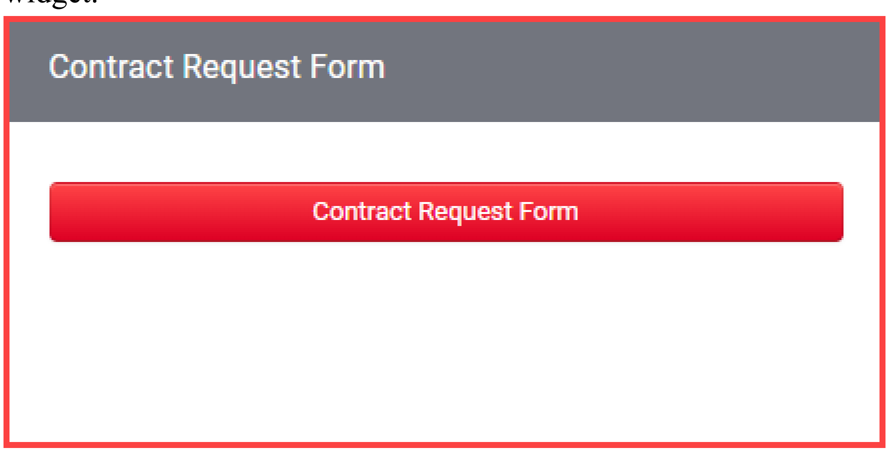
Complete Contract Request
As per Procurement Policy you may need to request a contract, please refer to Procure Good and Services to assist with the decision as to whether a contract is required. All Contract Requests will be routed through Procurement Services, and a Lead Buyer will be in contact with you. Should you require assistance with completing the Contract Request form, please submit a ticket through our Jira ticketing system Support Request and under components choose McGill ContractPlace.

The Contract Request form is used to gather some key information about your needs for the acquisitions of goods, services or construction works. Procurement Services may require supporting documentation for this process. Once submitted, the Contract Request will be routed to the Procurement Services Help Desk for initial review. Once reviewed it will be forwarded to the Lead Buyer responsible for your area. The Lead Buyer will review the request and either returned, approve, or reject the request.

Check your Email: You will receive an email notifying you once the Contract Request form has been submitted. You will receive further emails should the request be returned, approved, or rejected by the Lead Buyer.

Also note that fields marked with an Asterix (*) is a required field.
<u>Where to find the form</u>

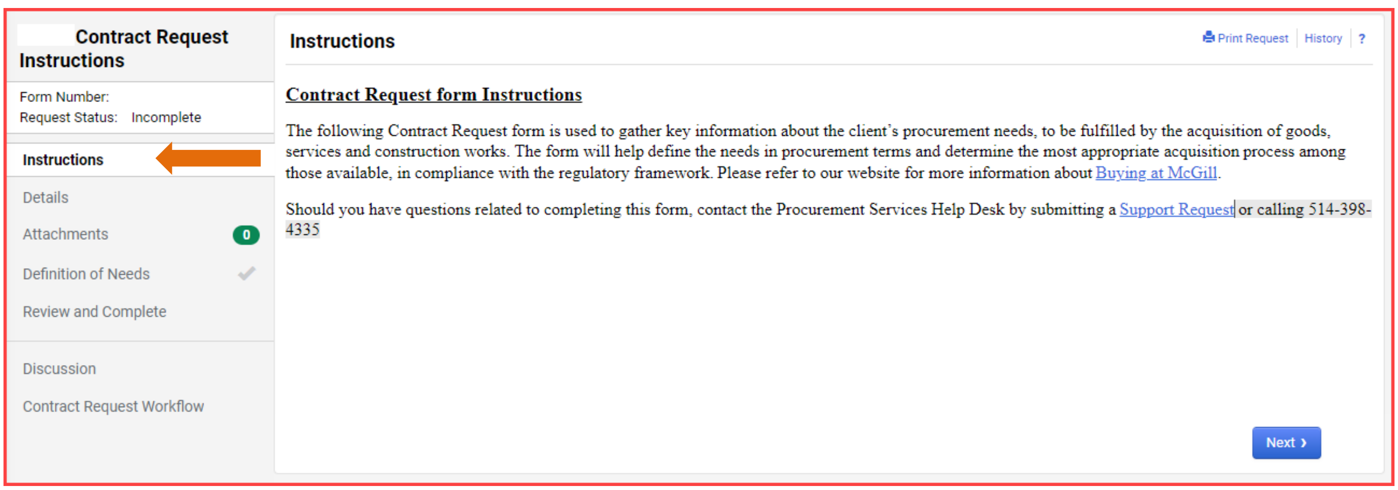
Log into McGill MarketPlace (MMP) and on the MMP landing page, scroll to the Contract Request form widget.



<u>Completing the Form</u>

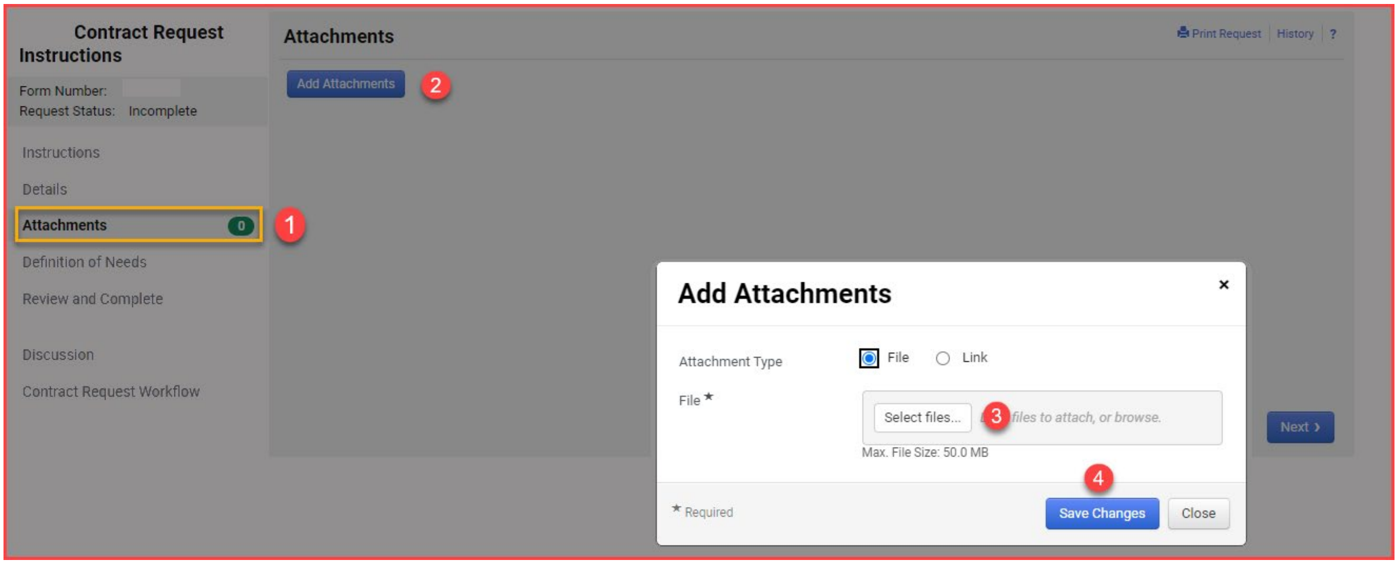
Once you selected to create a new contract request, the Create Contract Request dialog box will appear. You will need to enter a relevant name in the Contract Request Name field ex. Good and/or services required. Do not make any changes to the Select a Contract Request Template, it needs to remain “Contract Request”. Once you have entered the name, please click on the “Submit" button.

Instructions Menu: The Instructions page contains some information about the Contract Request. Click on any of the menus on the left side of the screen to go directly to a specific page of the Contract Request or click *Next* to proceed to each page in order. Green check marks indicate that the required fields for that page have been completed.

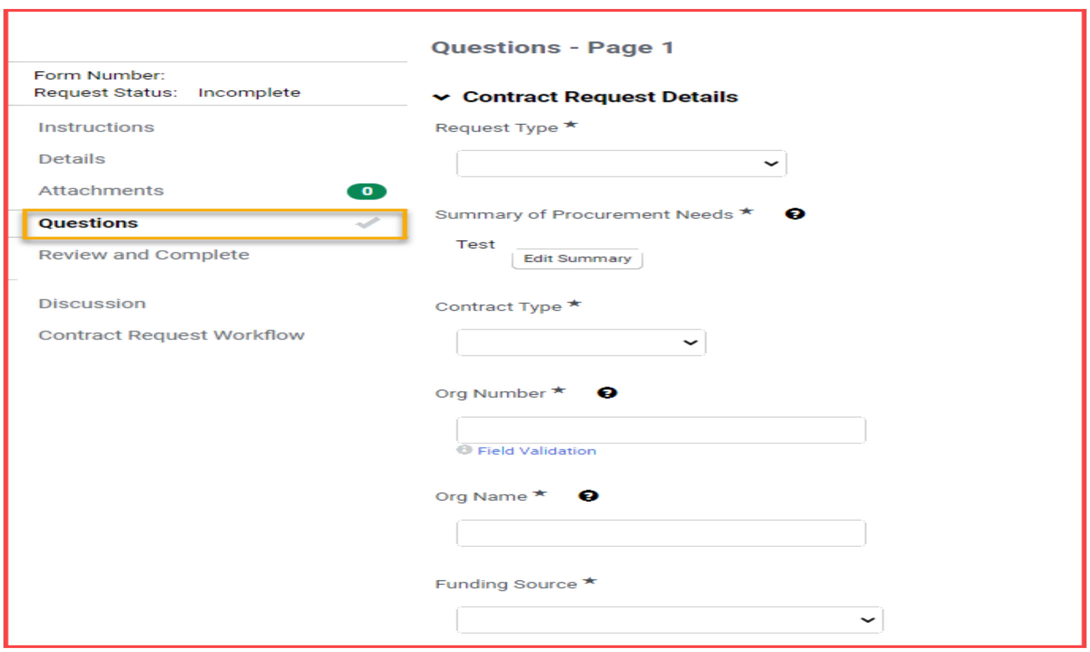


Details. This is where you can make changes to the Contract Request Name, should you need to Edit this field.

Attachments. Click on the *Attachments* tab (1) on the left side of the screen. To add Attachment to the request, click on Add Attachments (2). A dialog box will appear, and you click on Select Files or drag and drop your files (3). Once you have attached your files you can click on Save Changes (4). Suggested documentation to attach would be market research, quotes, Justifications Procurement or Finance.



Questions. The Questions page contains several questions that must be answered to complete the contract request, please note that any field marked with an Asterix (*) is a required field and must be answered before completing and submitting the form. Certain individual questions will only be visible based on how you answered previous question(s). Should you have questions with regards to a question, please click on the Help information icon .

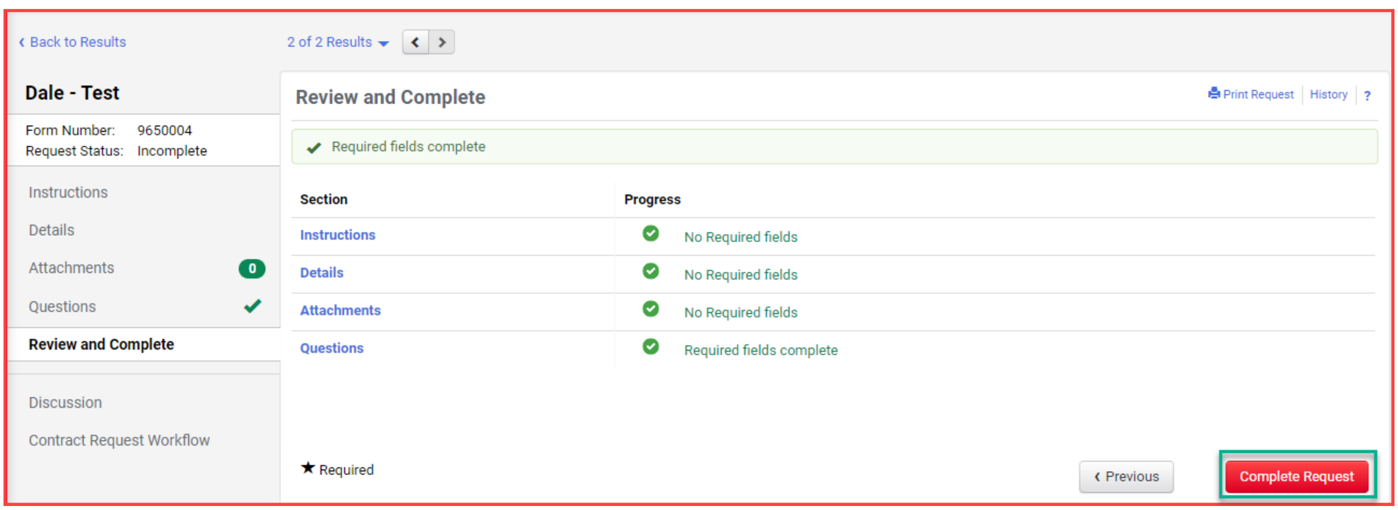


Question Groups

#	Question Text	Response Type	Instruction
Questions – Page 1 – Contract Request Details			
1.0	Request Type	Dropdown List (Pick One)	Pick New Contract, if it is a new contract, Amend contract in effect or Terminate a contract in effect.
1.1	Request Type: New Contract: Does the new contract supersede a contract currently in effect?	Yes or No	If Yes, a text box will appear Current Contract Number
1.2	Request Type: Amend a Contract in Effect or Terminate a Contract in Effect: Contract Number	Text Box	Enter the current effective contract number.
2.0	Business Need Summary	Text Box	Provide a summary of the business need in the text section
3.0	Contract Type	Dropdown List (Pick One)	Pick a contract Type from the provided dropdown list
3.1	Contract Type: Construction Works	Dropdown List (Pick One)	Pick a contract Type from the provided dropdown list
3.2	Contract Type: Provision of Services	Dropdown List (Pick One)	Pick a contract Type from the provided dropdown list
3.3	Contract Type: Supply of Goods	Dropdown List (Pick One)	Pick a contract Type from the provided dropdown list
Note: Depending on the Contract Type chosen an additional question will appear with a dropdown list for you to choose the contract sub-type.			
4.0	Org Number	Text Box	Enter the 5-digit number assigned to your work area. Click the "?" for more information.
5.0	Org Name	Text Box	You can enter the Org name or refer to the help Information "?" to refer to the Org Table.
6.0	Funding Source	Dropdown List (Pick One)	Select the funding source that applies.
7.0	Special Context Considerations	Dropdown List (Pick One)	Select Other Source(s) or Quebec Public Funds (in whole or in part)
7.1	Special Context Considerations: Other Source(s): Fund Code	Text Box	If you choose Other Source(s) you will be prompted to enter a Fund Code. You can refer to your Finance Team should you not be sure of the Fund code to enter.
8.0	Special Context Considerations	Dropdown List (Pick One)	If applicable, from the multiple-choice options, select the one that applies
9.0	Budgeted Amount (CAD)	Text (Dollar amount) in CAD Currency	Enter the budgeted amount in the text box in CAD currency
9.1	Need Fulfillment Date	Date dd/mm/yyyy	Date you would like to have a contract in place

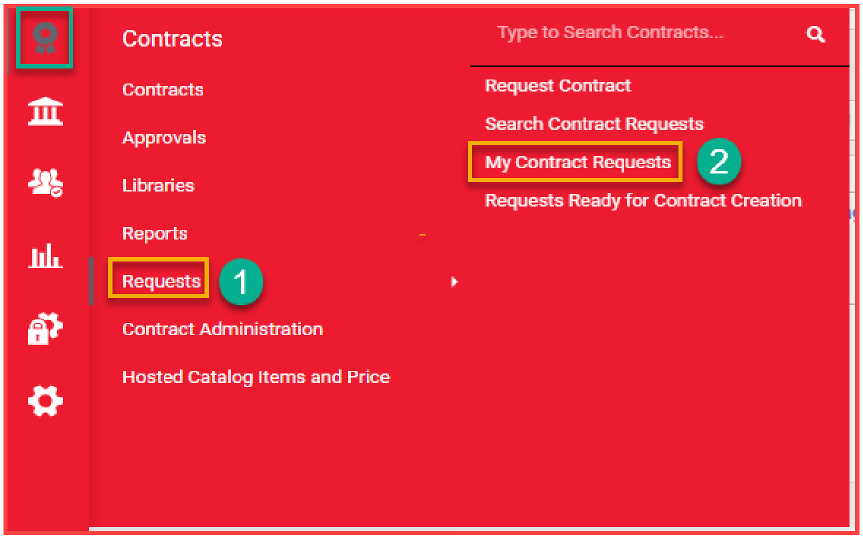
Discussion. Click on the *Discussions* tab on the left side of the screen to add a message to the Contract Manager regarding the contract.

Review and Complete. If any of the Required Fields (Questions with an Asterisk (*) beside them) are not completed, the page will be shown as grey and say *Incomplete*. Once all Required Fields are completed, the Review and Complete page will show green check marks ✔ and will say *No Required Fields* or *Required Fields Complete*.



Submit Request. Click *Complete Request* to submit the Contract Request. The Contract Request will be submitted and shown as "Under Review". Once submitted, the Contract request form will be reviewed by our Customer Support Team and then assigned to a Procurement Lead Buyer.

Check Status of your Request. After submitting a Contract Request, check the status of your Request from any screen, by clicking on the contract icon and browsing to Requests>My Contract Requests.



This will return the list of all Contract Requests you created in the last 90 days. To sort by date, click the **Sort by** field at the top. Likewise, you can select the Form Status you wish to view if you only want to look at those request you have submitted. The Form Statuses are as follows:

- **Incomplete** – this is a draft request, meaning you are working on it.
- **Under Review** – this is a request you have submitted but it has not been approved/processed.
- **Approved** – this is a request that has been fully approved but has not been converted into a contract yet.
- **Complete** – this is a request that has been approved and converted into a contract.
- **Returned** – The form has been returned to the originator of the form request.
- **Rejected** – The request has been refused and will need to be resubmitted should the Goods/Services still be required.

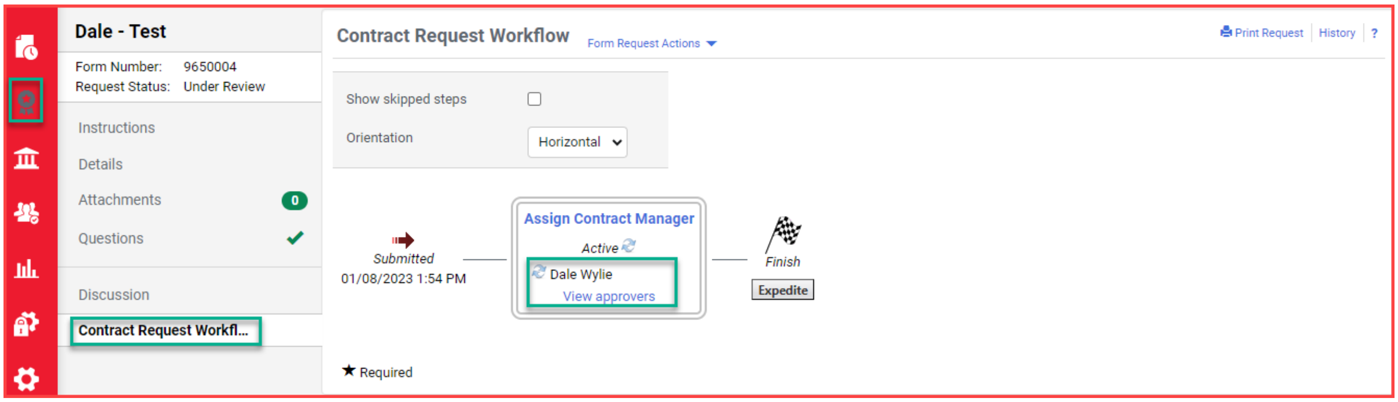
Created Date: Last 90 days | Quick search | Add Filter | Clear All Filters | ?

1-11 of 11 Results | 20 Per Page

Form Name	Request Number	Form Status	Created Date/Time	Template Name	Current Workflow Step	Pending Approver	Requestor	Submitted Date	Completed Date
Dale - Test	759006	Approved	22/02/2023 10:36:07 AM	Call for Public Tender	-	-	Dale Wylie	22/02/2023 10:41:13 AM	22/02/2023 2:02:10 PM
Request for Department Agreement <$25k	757472	Incomplete	20/02/2023 8:13:28 PM	Call for Public Tender	-	-	Don Taylor	–	–
Contract for Speaker, Performer, Artist Agreement	757485	Incomplete	20/02/2023 8:10:56 PM	Call for Public Tender	-	-	Don Taylor	–	–
IT Standard Agreement >$30K CAD	757505	Incomplete	20/02/2023 7:36:02 PM	Call for Public Tender	-	-	Don Taylor	–	–
Create a non-IT standard agreement	757484	Completed	20/02/2023 6:13:04 PM	Call for Public Tender	-	-	Don Taylor	20/02/2023 6:30:30 PM	20/02/2023 7:32:13 PM
Agreement with food service vendor	757452	Completed	20/02/2023 4:00:47 PM	Call for Public Tender	-	-	Don Taylor	20/02/2023 4:09:32 PM	20/02/2023 5:16:12 PM
Professional services for implementation of JAGGAER	754532	Completed	10/02/2023 3:09:00 PM	Call for Public Tender	-	-	Robert Wohlfarth	10/02/2023 3:16:56 PM	10/02/2023 3:19:29 PM
Software Agreement with Adobe	752634	Completed	03/02/2023 3:03:34 PM	Call for Public Tender	-	-	Robert Wohlfarth	03/02/2023 3:11:46 PM	03/02/2023 3:17:30 PM
Server Hardware	736656	Completed	07/12/2022 1:05:27 PM	Call for Public Tender	-	-	Sarah Grieb	07/12/2022 1:26:47 PM	07/12/2022 1:27:56 PM
test2	736531	Completed	07/12/2022 9:46:52 AM	Call for Public Tender	-	-	Sarah Grieb	07/12/2022 9:54:05 AM	07/12/2022 9:54:33 AM
test1	736492	Completed	07/12/2022 9:17:35 AM	Call for Public Tender	-	-	Sarah Grieb	07/12/2022 9:21:26 AM	07/12/2022 9:23:23 AM

1-11 of 11 Results | 20 Per Page

You can see where a request is in the approval process or access the corresponding contract by clicking the Form Name to open the request.



If the request has not been completed yet and you wish to see who the next approver is, you can click on the *Contract Request Workflow* link in the left-hand menu to see where your request is in workflow.