



Creating & Submitting a Contract Request

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Quick Reference Checklist: Contract Request

Step One: Locate and Open the Contract Workspace for the Contract

By creating your Contract Request from the Contract Workspace (CW), much of the detail will be completed.

- Locate and open the Contract Workspace;
- Click the arrow next to **Actions** and select **Follow-on Project**;
- Select **Contract Request (Procurement)**;
- If you are unsure how to locate the CW, contact Procurement for assistance.

Step Two: Complete New Contract Request Fields

- Insert Title in **Name** field: The title should identify the Good or Service being sought. Do **NOT** use the name of a vendor or previous contract.
- A **Description** should be carried forward from your Workspace. However, add additional details including the following:
- Brief description of what is required/requested in your amendment, for example: *'Amendment required to renew contract for an additional option year and add additional funds'*;
- Leave **Test Project** as **No**;
- In the **Contract Amount** field, enter the full value of the initial term of the contract (e.g. 3 years at \$100,000 per year is \$300,000);
- Leave **Copy all documents from the parent project?** as **No**;
- Leave **Copy all groups from the parent project?** as **No**;
- Confirm the other fields are accurate;
- Check **Select All Funding Authorizations that Apply** is correctly populated from CW if applicable (PNS clients) – only available when 100 series Dept. selected;
- After the fields are completed and as detailed as possible, click **Create** at the top or bottom right-hand side.

Step Three: Upload Supporting Documents to the Contract Request & Submit

- Click on the **Documents** tab of the Contract Request;
- Click **Actions** at the top right of screen;
- Under **Upload** select **Documents**;
- Select **Browse** or **Choose File** and locate the document you wish to upload (or drag and drop);
- In the **Description** field, enter a short description of what is contained in the document being uploaded;
- Leave **Announce the creation of this new document** and **Unzip contents to project** boxes unchecked;
- Click **Create** at the bottom-right of the screen;
- Repeat steps to upload each document. Documents should **NOT** be uploaded in one large PDF file. Each document should be uploaded separately;
- Once you have finished uploading all documents, click each one and select **Publish** to change the status from Draft;
- Click the **Tasks** tab;
- Click the arrow next to the **Submit** task name and select **View Task Details**;
- **Do not alter # 1** and **# 2** on this screen;
- You may insert additional information in the **Provide an initial message and click Submit** box. Note however, this will be viewed by the Approver, not by the Specialist who is later assigned;
- Click **Submit**. Under the **Tasks** tab, confirm the status indicates **In Approval**. If it says **Not Started**, you have **NOT** sent the CRW to Procurement and they will not receive any notification.

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Contract Request

What is a Contract Request?

A Contract Request (CRW) is a request to modify, amend or extend an existing contract for a good, service or construction. Contract Requests are an essential part of Procurement’s Contract Management process. Some typical requests include amendments to project scope, dollar value, and expiry date.

When is a Contract Request Required?

DO submit a Contract Request **IF**

- there is an **existing contract** in place for the good, service, or construction (*contract requests are for changes to scope, dollar value, extensions, etc., not purchases*).

DO NOT submit a Contract Request **IF**

- you are purchasing off an existing **Standing Offer**.

The diagram below shows the Workflow process for a Contract Request.



When creating a Contract Request, it is important to first search the system to find any existing Contract Workspace (CW). If it can't be found, and you believe it is there, then contact [Procurement Support](#) and submit a ticket.

Steps for Creating a Contract Request

There are four steps to creating and submitting a Contract Request. A Contract Request is ALWAYS created as a Follow-on project.

1. Locate the Contract Workspace in Ariba.
2. Create a Contract Request as a Follow-on Project (*fill in the form*).
3. Upload Supporting Documents.
4. And the final step, most importantly, is to Submit the Contract Request.



TAKE CARE! This third and final step is often missed and can cause delays!

Locate the Contract Workspace

A Contract Request is always created as a follow-on project from the Contract Workspace. Therefore, the first step is to search for the Contract Workspace in Ariba. You can search for it by number (CW#), or name (or part of name). Once you locate the Contract Workspace, you create the Contract Request from it and much of the detail will be pre-populated. **However, do not spend too much time searching for something that may not be there or that you may not have access to.** If you are unable to locate it, contact [Procurement Support](#) (see Note above).

1. Navigate to the Search bar on the HOME tab of the Dashboard.
2. From the Search bar, click the down arrow key beside the Search bar and select **Contract Workspace (Procurement)** (Figure 1).
3. In the Search bar type the CW# (e.g. CW5519), or the name/title or part name, and click the magnifying glass (Figure 7).

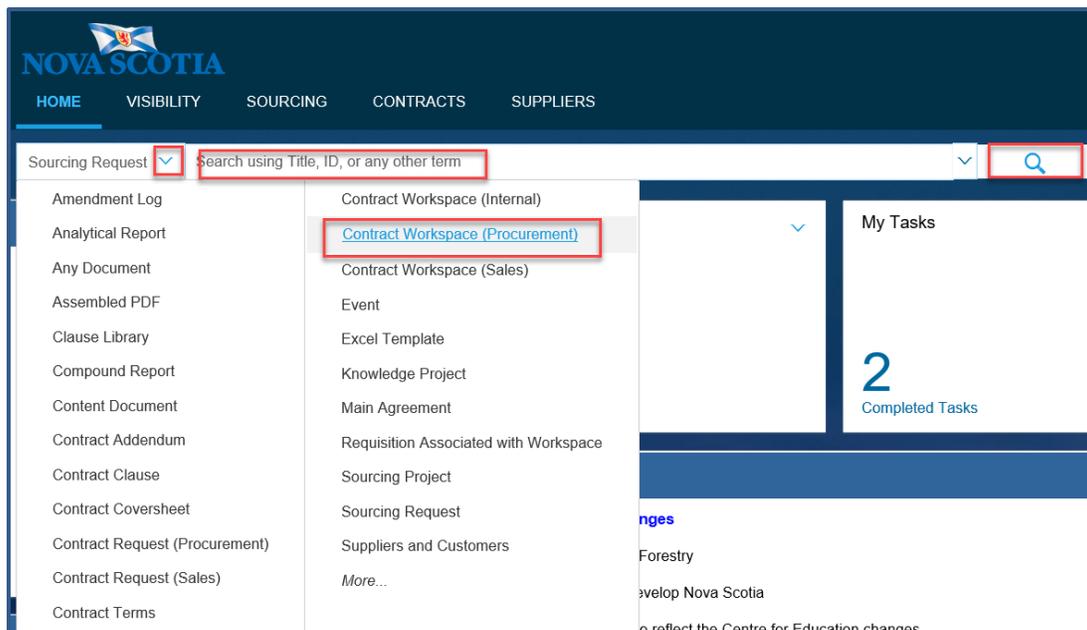


Figure 1

4. Add filters to narrow down the search if necessary. For more help on adding filters, see the [Ariba Quick Reference Guide](#) on searching.

Create the Contract Request

Once you have located the Contract Workspace in Ariba, click and select **Open**.

1. Navigate to the Overview tab. Verify it is the correct Contract Workspace (ID No., Title, etc.).
2. Click the down arrow key beside **Actions** and select **Follow-on Project** (Figure 2).

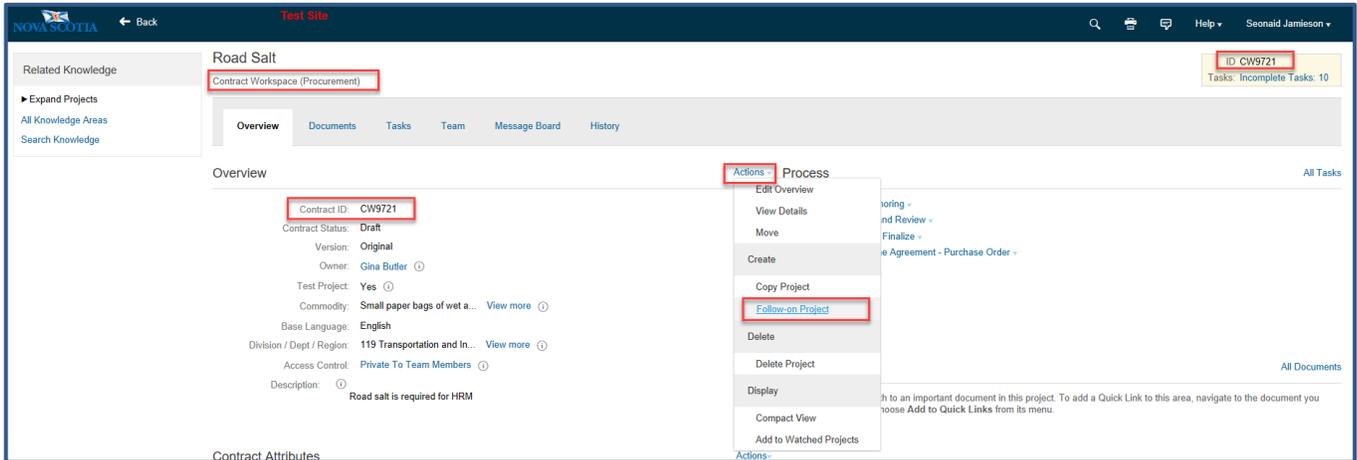


Figure 2

3. Select **Contract Request (Procurement)**. The **Create Contract Request (Procurement)** screen appears (*Overview form*).
4. Complete the fields as outlined below in Complete the Contract Request Form.

Complete the Contract Request Form

The Overview form captures key information. Note that, as the Contract Request has been created from a Contract Workspace, many of the fields will already be populated.

1. Complete the fields as follows, **leaving others 'as is' unless otherwise required**. Ensure all mandatory* fields are completed.

Label	Description
Name:*	The title should clearly identify the change required for good, service or construction. For example, <i>Extend Oracle Maintenance OA; RSO Increase to OA# for XXX</i> . Do NOT use the name of a vendor or previous contract.
Description:	The description is carried forward from the Contract Workspace. However, additional details can be inserted here, for example, a brief description of what is required in the amendment.
Copy from Contract:	Leave as is (no value).
Test Project:*	Default is No – leave as is.
Base Language:	Default is English ; the other option is French .
Supplier:	The supplier is added here and is populated from Contract Workspace.
Affected Parties:	This field is populated from Contract Workspace, usually with the supplier added above; more Affected Parties (<i>such as multiple suppliers</i>) are added here, if applicable.
Contract Amount:	The current contract amount is populated from the Contract Workspace and is the full value of the initial term of the contract. For example, 3 years at \$100,000 per year is \$300,000.
Commodity:*	This field should already be populated; however, it can be edited and/or added to, if applicable. Click Search more and drill down to find your specific commodity (see Multilevel Dropdown Fields for more information).

Label	Description
Division /Dept. /Region:*	<p>This field is already populated; however, it can be edited, if applicable.</p> <p>Click Search more and drill down to find your specific department (see Multilevel Dropdown Fields for more information) – YOU WILL BE UNABLE to select the parent categories (ending in '000'), such as the <i>Province of Nova Scotia, Nova Scotia Health Authorities, or Nova Scotia School Boards.</i></p> <p>PNS Departments can be accessed by clicking the ► beside Province of Nova Scotia.</p> <p>If request is for a Province wide contract, choose all lower-level branches that are applicable (<i>i.e. share equal responsibility</i>).</p>
Predecessor Project:	This field is pre-populated from the CW.
Procurement Type:*	<p>This field should be pre-populated from the CW but can be edited. This selection will decide which procurement group (<i>goods, services, clinical or construction</i>) the request is assigned to.</p> <p>NOTE: If this selection is not correct, delays can occur. For example, the Construction group cannot approve Clinical or Goods & Services and vice versa. Be Specific.</p> <p>Take your time to choose the CORRECT category as this determines the routing of your CRW to the appropriate team within Procurement (<i>e.g. Clinical Equipment Maintenance/Service, choose the respective CLINICAL Procurement Type</i>).</p> <p>Click the info ⓘ button and click the link to download the document for detailed descriptions and examples.</p>
Contract Type:*	This field is populated from the CW.
Who is the Subject Matter Expert for Procurement to Contact?:*	Enter the name, title, phone number and email of SME for Procurement to contact. This individual is the person in your organization who is currently best suited to discuss requirements with the Specialist. This is a mandatory field.
Funding Authorization Required?*	This field only appears if a 100 series (PNS) Division/Dept /Region is selected, and is populated from the Contract Workspace.
Copy all documents from the parent project?	Default is No. Leave as is.
Copy all project groups from the parent project?	Default is No. Leave as is.
Agreement Date:	On the right-hand side, this field is the date the contract is signed.
Term Type:*	Default is Fixed.
Effective Date:*	The date the contract comes into effect; may already be populated but can be changed.
Expiration Date:	May be populated from the Contract Workspace; if so, clear this field.

2. Click **Create**.



REMEMBER: Although the Contract Request has been created, Procurement can't see it yet. There is still some work to do before submitting it.

Upload Supporting Documents

Now that the Contract Request has been created, the next step is to upload any supporting documents. These documents vary from project to project. Their purpose is to provide examples and context to help Procurement understand and approve the request. For example, the original contract and outline agreement (*if there is one*) and any related documents such as new specifications and itemised price changes.

Under the **Documents** Tab, upload a copy (**SEPARATELY**) of any of the following that are applicable (*instructions on uploading are provided below*):

- ✓ Copy of previous tender document and addendum documents (*or one from another jurisdiction*)
- ✓ Copy of previous contract and amendments
- ✓ Market Research (*if available*)
- ✓ Specifications (*if available*)
- ✓ SOW – Statement of Work

If this is request for an ALTP, please ensure the following documents are included:

- ✓ Signed ALTP (*If support already received from Procurement*)
- ✓ Contract to accompany ALTP (*If the contract has already been signed, you must include with your request*)
- ✓ SOW - Statement of Work
- ✓ Quote(s)

To upload documents:

1. Navigate to the **Documents** tab.
2. Click the **Actions** button to expand menu.
3. Under **Upload**, select **Document**. The **Create Document** screen appears.
4. **Upload file:** Click the **Browse** or **Choose File** button to locate the file to upload. You can also **drag and drop** the file into the box. File names should reflect the content (*e.g. Original Contract*) and be uploaded one at a time, not grouped into one large file.
5. **Description:** Enter a short description of the file contents (*for example Itemised changes updated June 10, 2021*).
6. Click **Create** ➤ **Done**.

Repeat steps 2-6 above to add more documents as required. In the screenshot (Figure 3), an Excel Workbook and a PDF file have been added.

Clicking on each file will give the option to **Download Draft, Copy, Move** or **Delete, Publish** etc.

7. Select **Publish** for each one.

If you inadvertently uploaded the incorrect file, follow the instructions to Replace Documents on page 10.

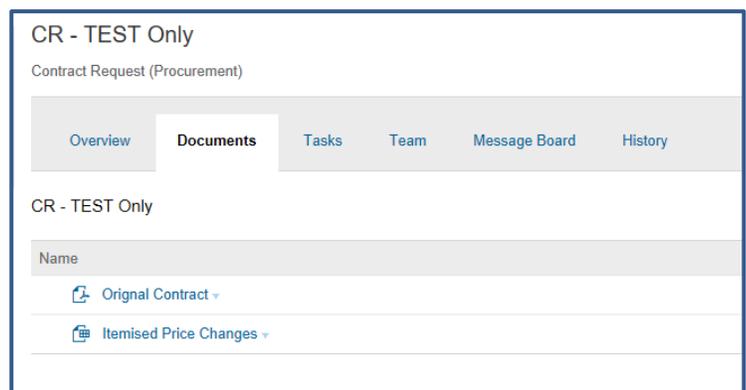


Figure 3

Submit the Contract Request

Once all the supporting documents have been uploaded, and the details thoroughly checked, the Contract Request must be submitted to Procurement. **If this step is missed, Procurement will not see it!**

REMINDER: Be sure to double-check that all the information you have entered is correct and relevant and check that all the required documents have been added. If you need to replace any documents, follow the steps in the **Replace Documents** section on page 10. Once you are certain all necessary information has been added, follow the steps below to submit the request.



1. Navigate to the **Tasks** tab.
2. Select the dropdown beside the task, and **Action** > **View Task Details**. The Approval Task screen is displayed (Figure 4).
3. Steps 1 and 2 require no action.
4. Step 3: Optional – if required, enter a brief description. Note however, that this will be viewed by the Approver and not the Specialist to whom it is later assigned.
5. Do **NOT** add attachments to the task as they may be missed. Attachments are **always** added via the **Documents** tab.
6. Step 4: Click **Submit**.

Once the Contract Request has been submitted, the status under the **Tasks** tab changes from **Not Started** to **In Approval**.

Figure 4



NOTE: This is a good way to check to see if the Contract Request has been submitted to Procurement.

Approved Contract Request

When a Contract Request is approved, an email notification is sent to you and under the **Tasks** tab, the line item status changes from **In Approval** to **Approved**, and there is a checkmark beside it. This means the Contract Request has been approved to move through to the next step in the Procurement process.

Denied Contract Request

Procurements vary in their complexity, and the process for approving Contract Requests reflects this. **A denied Contract Request is no reason to panic!** There will be a valid reason and the opportunity to submit another round (*a revised request*).

When a Contract Request is denied, an email notification is sent with the reason (Figure 5), the status changes from **In Approval** to **Denied** under Task History (**View Task Details**), and there is an exclamation mark beside the Task. The Request status will be set to **'on hold'** until the new round has been received and approved.

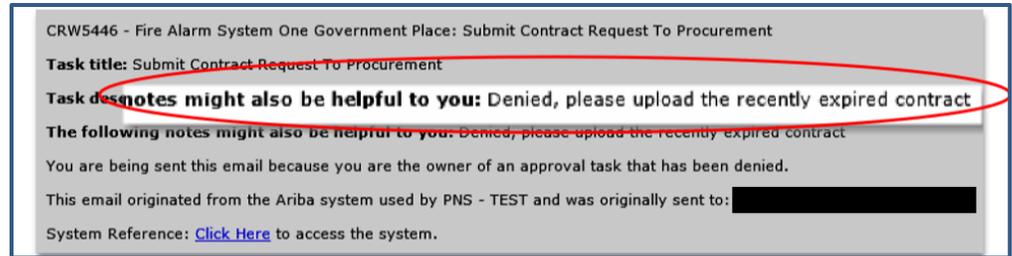


Figure 5

From the **Task History** screen, you can view the Reviewer comments and there is an option to submit a **New Round**.

1. Click **New Round**.
2. Steps 1 and 2 need no action.
3. Next, review the comments and add a message and any missing information or documents, if required.
4. Click **Submit**.

Once the New Round is submitted, the status changes again from **Denied** to **In Approval**, and when it is approved, the status will change to **Approved** and you will receive an email notification.

Multilevel Dropdown Fields

Ariba sometimes requires you to search a multilevel dropdown field, such as the *Commodity* and *Division/Dept./Region* field in the Overview Form when creating a new Sourcing or Contract Request. These fields can be navigated using keywords and/or drilling down using the dropdown arrows.

Use Keywords

1. Navigate to the relevant field (*Commodity* or *Division/Dept./Region*).
2. Start typing the Commodity or Division/Dept/Region name and click **Search More** (Figures A1 & A2).
3. Drill down if necessary, by clicking the ► symbol to expand.
4. Check the box beside the required Commodity or Division / Dept /Region (Figures A3 & A4).
5. Click **Done**.

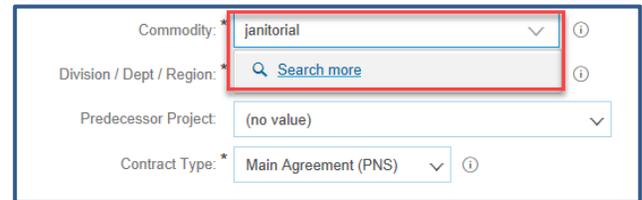


Figure A 1 shows a screenshot of the Overview Form. The 'Commodity' field is set to 'janitorial'. Below it, the 'Division / Dept / Region' field has a 'Search more' button highlighted with a red box. Other fields include 'Predecessor Project' (no value) and 'Contract Type' (Main Agreement (PNS)).

Figure A 1

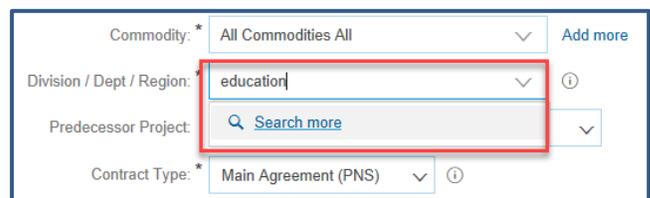


Figure A 2 shows a screenshot of the Overview Form. The 'Division / Dept / Region' field is set to 'education'. Below it, the 'Predecessor Project' field has a 'Search more' button highlighted with a red box. Other fields include 'Commodity' (All Commodities All) and 'Contract Type' (Main Agreement (PNS)).

Figure A 2

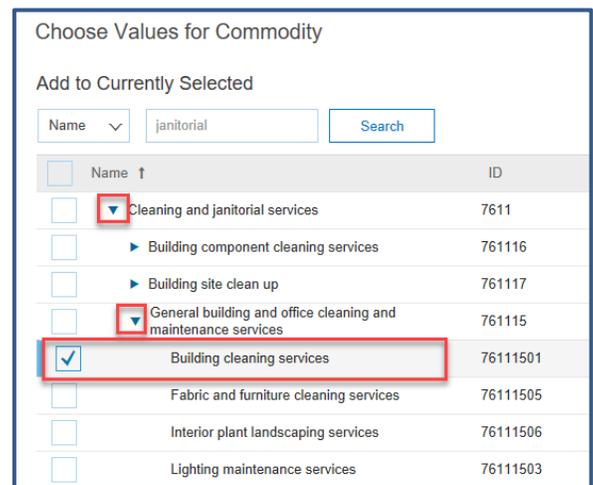


Figure A 3 shows a dialog box titled 'Choose Values for Commodity'. It has a search bar with 'janitorial' and a 'Search' button. Below is a table of results:

<input type="checkbox"/>	Name ↑	ID
<input type="checkbox"/>	▼ Cleaning and janitorial services	7611
<input type="checkbox"/>	▶ Building component cleaning services	761116
<input type="checkbox"/>	▶ Building site clean up	761117
<input type="checkbox"/>	▼ General building and office cleaning and maintenance services	761115
<input checked="" type="checkbox"/>	Building cleaning services	76111501
<input type="checkbox"/>	Fabric and furniture cleaning services	76111505
<input type="checkbox"/>	Interior plant landscaping services	76111506
<input type="checkbox"/>	Lighting maintenance services	76111503

Figure A 3

Choose Values for Division / Dept / Region

Add to Currently Selected

Function Search

Function ↑	ID
<input type="checkbox"/> All	All
<input type="checkbox"/> ▶ Agencies and Commissions	400000
<input type="checkbox"/> IWK	500001
<input type="checkbox"/> ▶ Nova Scotia Health Authority	200000
<input type="checkbox"/> ▶ Nova Scotia School Boards	300000
<input type="checkbox"/> ▼ Province of Nova Scotia	100000
<input type="checkbox"/> Agriculture	100101
<input checked="" type="checkbox"/> Business	100102
<input type="checkbox"/> Communities, Culture and Heritage	100103
<input type="checkbox"/> Community Services	100104
<input type="checkbox"/> Education and Early Childhood Development	100105
<input type="checkbox"/> Energy and Mines	100106
<input type="checkbox"/> Environment	100107
<input type="checkbox"/> Finance and Treasury Board	100108
<input type="checkbox"/> Fisheries and Aquaculture	100109
<input type="checkbox"/> Health and Wellness	100110
<input type="checkbox"/> Intergovernmental Affairs	100111

Currently Selected

Function ↑	ID
<input checked="" type="checkbox"/> Business	100102

Done

Figure A 4

Drill Down

You can also drill down using the dropdown arrows to locate the required Commodity or Department.

1. Navigate to the relevant field (e.g. *Commodity* or *Division/Dept./Region*).
2. Click the dropdown arrow next to the field and click **Search more**.
3. Use the ▶ symbol to drill down and navigate to the required Division/ Dept/ Region, or
4. Start typing the Commodity or Department name in the Search field and click **Search**.
5. Select the box beside the required Commodity or Department **at the lowest level (Branch level)** (Figures A3 & A4)).
6. Click **Done**.



You will not be able to select the parent categories at Division level (any ending in 000), such as the Province of Nova Scotia, Nova Scotia Health Authorities, or Nova Scotia School Boards. You must select the lowest level, that is, the branch level specific to your department.

Replace Documents

If you inadvertently add the wrong document to a Sourcing Request or a Contract Request, or you simply want to replace it, there is a feature within Ariba that allows this.

1. Navigate to the **Documents** Tab of the Request.
2. Click the document you wish to replace.
3. Select **Replace Document** from the menu (Figure A5). The Replace Document screen appears (Figure A6).

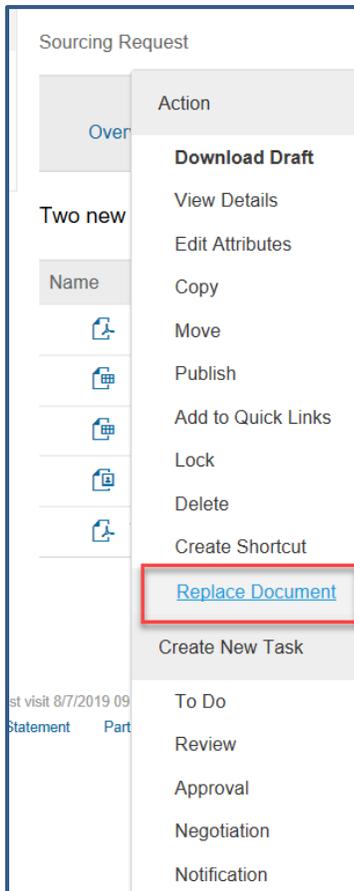


Figure A 5

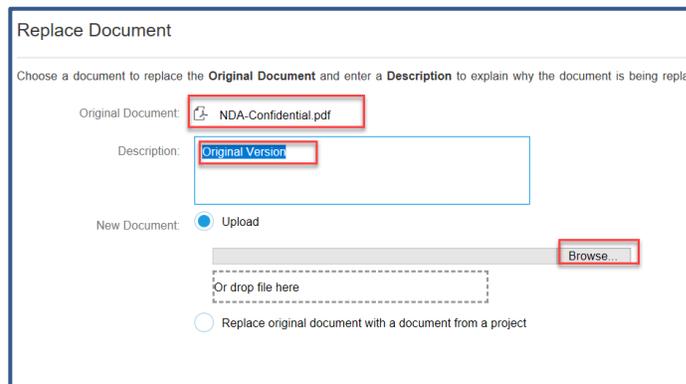


Figure A 6

4. Click the **Browse** or **Choose File** button, locate the file and click **Open**.
5. Or **Drag and drop** the file into the box.
6. Add a description.
7. Click **Replace**.

If the file has the same name and type, the next screen that appears is the **Save Version** screen. If it has a different name and/or type, the following options will be available:

- Use the original document name and continue uploading of file
- Replace the document by the uploaded file
- Select another file for upload

Make your selection and click **OK**. This will open the Version Edit screen, which gives the option to save the changes as a new version or to continue editing v1.

- If **Yes, save as v2** is selected, you can enter a version comment.
 - If **No, save and continue editing v1** is selected, the Version Comment box disappears.
8. Enter version comments if applicable.
 9. Click **Save**.

Version History

To view the version history of a document:

1. Navigate to the **Documents** tab and locate the document you wish to view.
2. Click the document and select **View Details** from the menu.

The Document Overview tab is displayed (Figure A7). This shows the name of the document, description, status, version number, version comment etc.

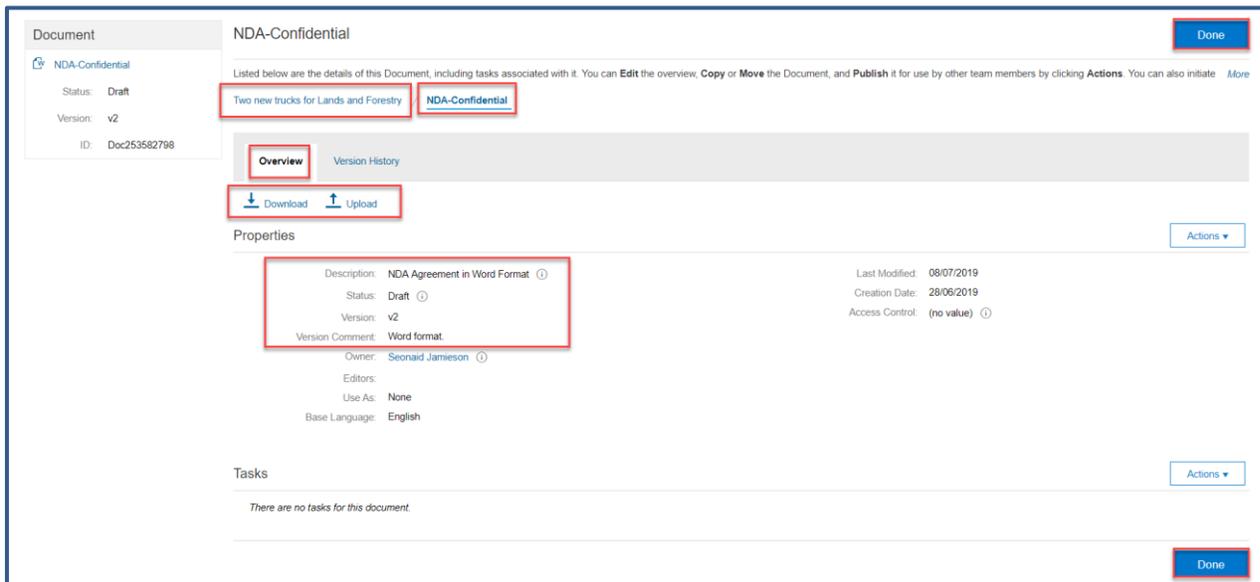


Figure A 7

3. Click the **Version History** tab. This displays the document name(s) and the version numbers and who modified the document.

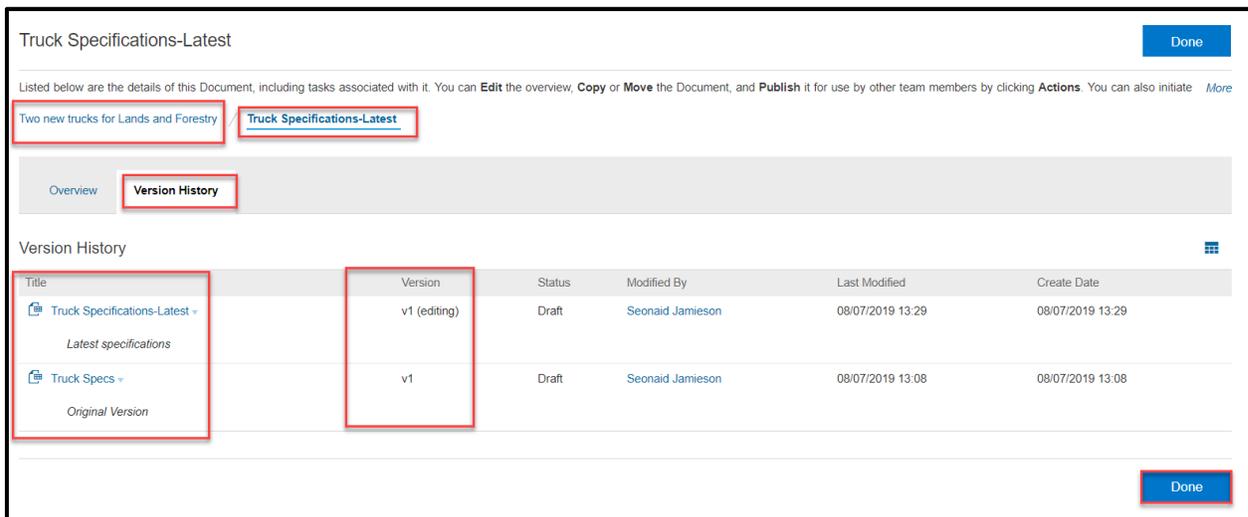


Figure A 8

In Figure A8 above the document name has been changed but the version is still version 1. In Figure A9 below there are versions 1–4 and v4 has been replaced and is being edited. The Version History will always show the original version of the document.

Itemised Price Changes Done

Listed below are the details of this Document, including tasks associated with it. You can **Edit** the overview, **Copy** or **Move** the Document, and **Publish** it for use by other team members by clicking **Actions**. You can also initiate *More*

Two new trucks for Lands and Forestry / Itemised Price Changes

Overview Version History

Version History ☰

Title	Version	Status	Modified By	Last Modified	Create Date
 Itemised Price Changes ▾ <i>Wrong file uploaded originally.</i>	v4 (editing)	Draft	Seonaid Jamieson	28/06/2019 09:54	28/06/2019 09:54
 Detailed specs ▾	v4	Published	Seonaid Jamieson	08/05/2019 13:20	08/05/2019 13:20
 Detailed specs ▾	v3	Published	Seonaid Jamieson	08/05/2019 11:52	08/05/2019 11:52
 Detailed specs ▾	v2	Published	Seonaid Jamieson	08/05/2019 11:51	08/05/2019 11:52
 Detailed specs ▾ <i>Original Version</i>	v1	Draft	Seonaid Jamieson	25/04/2019 11:24	25/04/2019 11:24

Figure A 9

Additional Help & Resources

For additional help and training in Ariba, please contact [Procurement Support](#) to submit a ticket or call the support line at 902-424-5770.

Document Information

Revision History

Date	Version	Author/Editor	Requestor	Description
October 13, 2021	1.0	Kamia Creelman	Seonaid MacFarlane	Split Sourcing & Contract Request Guide in two references