



Streamlining Agreement Intake with the OnBase Contract Services Request Form

Project Purpose & Background

- Replacing email-based intake with a structured form
- Developed in collaboration with IRT using OnBase
- Designed to improve consistency, tracking, and communication

What the Form Does

- Provides a single point of entry for agreement and amendment requests*
- Adjusts dynamically based on selected request type
- Captures key details up front to reduce follow-up
- Routes to Procurement and Contract Services for triage and assignment
- Sends automated status updates (received, returned, assigned, in process, completed)

Benefits for Campus Users

- Easier, more consistent way to submit requests
- Reduces email back-and-forth
- Automated status updates keep requestors informed
- Improves visibility and tracking

Where This Fits with CSUBuy P2P

- OnBase form is an interim solution for agreement and amendment intake
- Long-term plan is to transition to CSUBuy Contracts Module once workflow capabilities are live
- CSUBuy P2P acceleration rollout is currently focused on req-to-PO (not contracts yet)
- OnBase allows us to improve now while we wait for system-wide enhancements

Demo

A Quick Look at the Form

What to Expect Next

- Campus-wide rollout targeted for late October
- Final round of UAT underway
- Feedback from pilot testers has been helpful (Thank you!)
- End-user communications and reference guide coming soon

Questions?

Thank you for your time and support!

