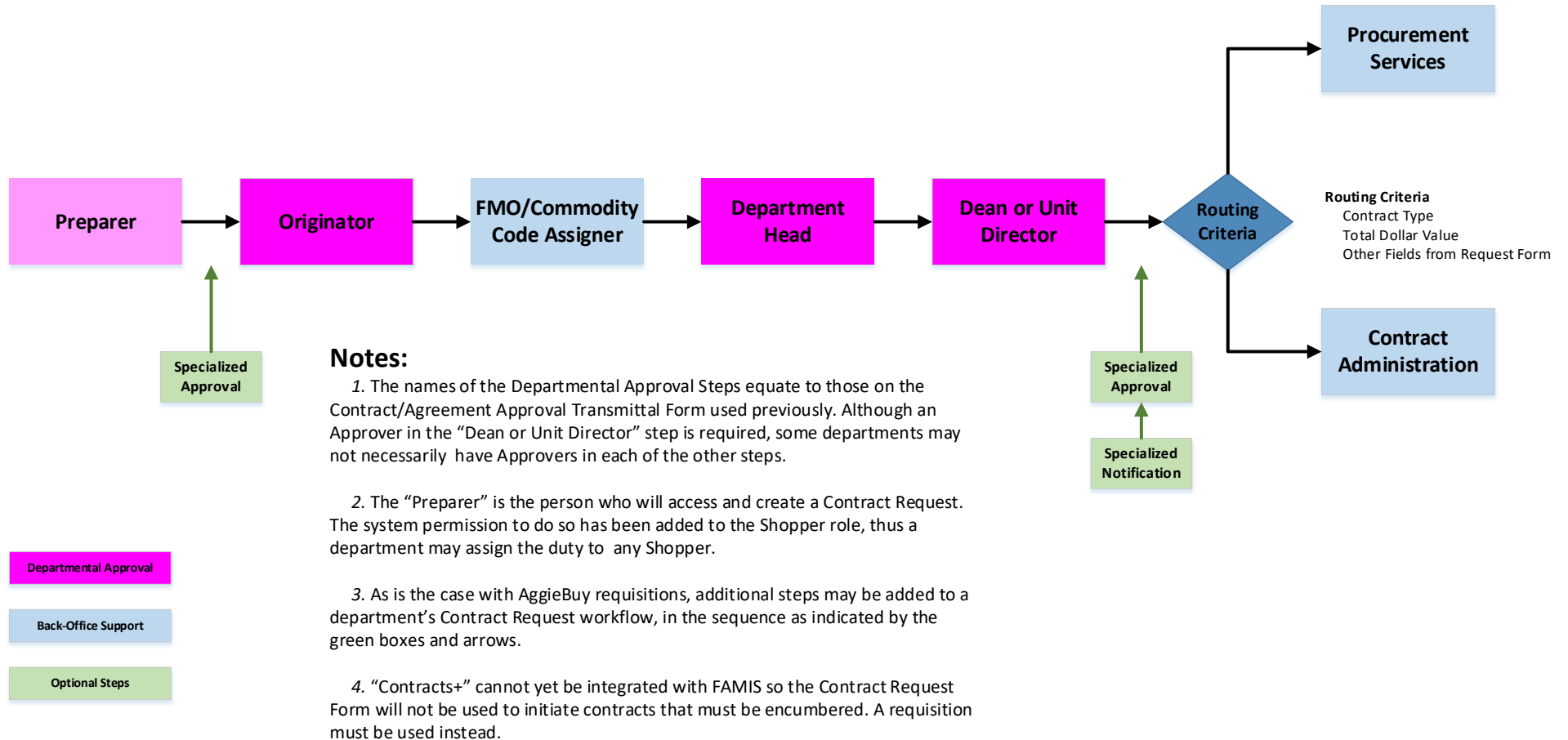


“Contracts+” Application

Contract Request Form Workflow



TARLETON STATE UNIVERSITY
Member of The Texas A&M University System

Shop ▸ Shopping ▸ [Shopping Home](#)

Shop Everything

Go to: [advanced search](#) | [favorites](#) | [forms](#) | [non-catalog item](#) | [quick order](#) Browse: [suppliers](#) | [categories](#) | [contracts](#) | [chemicals](#)

Contracts

- Contracts
- Approvals
- Reports
- Requests**

Type to Search Contracts...

- Request Contract**
- Search Contract Requests
- My Contract Requests

Selected Suppliers (Suppliers recently added to the MarketPlace)

Supplies / Furniture / Books

- PDME Office Depot HUB Partner
- HBI Steelcase HUB Partner
- Complete Book HUB

Computers / Technology

- shi HUB - Computers & Electronics
- BH Audio Visual Equipment

Henry Schein

- SUMMUS/VWR
- Fisher Scientific HUB Partner
- Medline HUB Partner
- HENRY SCHEIN® Athletic / Medical Supplies

Tarleton's purchasing and e-commerce website!

Get the latest NEWS about TexanBuy at [AggieBuy.tamu.edu](#)

Get the latest guides and resources available at [AggieBuy.tamu.edu/Training](#)

To request/initiate a Contract, select "Request Contract" from the Contracts fly-out menu.

TARLETON STATE UNIVERSITY

Shop ▸ Shopping ▸ Shopping Home

Shop Everything Go

Go to: advanced search | favorites | forms | non-catalog item | quick order Browse: suppliers | categories | contracts | chemicals

▼ Showcased Suppliers (Suppliers recent)

WorkQuest

▼ Scientific & Medical Supplies

VWR INTERNATIONAL
SUMMUS/VWR

POSSIBLE
Fisher Scientific HUB Partner

mavich
Medicine HUB Partner

HENRY SCHEIN
Athletic / Medical Supplies

TexanBuy
POWERED BY AGGIEBUY

Welcome to
Tarleton's purchasing and e-commerce website!

Get the latest NEWS about TexanBuy at AggieBuy.tamu.edu

Get the latest guides and resources available at
AggieBuy.tamu.edu/Training

Create Contract Request

Contract Request Name ★ TSU Demo

Select a Contract Request Form ★ Contract Request

★ Required

Submit Close

Enter a Name for your
Contract Request

The Contract Request Form field will
default to "Contract Request" – do not
change or delete.

TARLETON STATE UNIVERSITY
Member of The Texas A&M University System

Contracts ▶ Requests ▶ My Contract Requests

< Back to My Contract Requests

TSU Demo

Form Number: 2874526
Request Status: Incomplete

Instructions

Details

Attachments 0

Questions

Contract Information

Routing Determination

Departmental Information

Back Office

Review and Complete

Discussion

Contract Request Workflow

Instructions

Print Request

History

?

Currently, this Contract Request Form does not fully integrate with FAMIS. If you wish to encumber the funds for this Contract, please create and submit a Requisition instead of using the Contract Request Form.

-Please fill out all fields to ensure your request will not be returned for incomplete information.

-Attach any quotes, vendor contracts, documentation, etc. in the Attachments section.

-Even if the purchase is classified as "exempt", it may still require additional review from the Department of Procurement Services and/or the Department of Contract Administration prior to approval.

-Once you have Reviewed and Completed your Request, you can follow its progress through the Approval Workflow by clicking the "Contract Request Workflow" link in the lower-left corner of the screen.

ATTENTION THOSE WHO WILL BE APPROVING THIS REQUEST!

-By approving this Request you are also affirming that no conflict of interest exists with the Contractor/Supplier.

-By approving this Request you are also approving/affirming any "Sole Source Justification" that is included.

The system will automatically assign a number to your Contract Request Form. *NOTE: The Request Form cannot yet be integrated with FAMIS so if you wish to encumber the funds do not use the Request Form, create a requisition instead.*

Next >

Click the "Next" button to proceed.

Unless you wish to change the Contract Request Name, this screen requires no action.

TARLETON STATE UNIVERSITY
Member of The Texas A&M University System

Contracts ▶ Requests ▶ My Contract Requests

< Back to My Contract Requests

TSU Demo

Form Number: 2874526
Request Status: Incomplete

Instructions

Details

Attachments 0

Questions

- Contract Information
- Routing Determination
- Departmental Information
- Back Office

Review and Complete

Discussion

Contract Request Workflow

Details

Contract Request Name ★ TSU Demo

Template Contract Request

Contract Type -

Description -

< Previous Save Progress Next >

Clicking the “Next” button advances the screen through the sections of the Request Form as they appear on this menu. You may also navigate the Request Form by clicking the section names on the Menu, or the “Previous” button.

NOTE: Clicking the “Next” button automatically saves any changes you make on a screen before it advances you to the next screen. Use the “Save Progress” button when you make a change on a screen but then wish to leave the Request Form or navigate to another screen via the menu.

Next ➤

Questions

Print Request | History | ?

Overview

Contract Information


Routing Determination

Departmental Information

Back Office

Progress

 Incomplete

 Incomplete

✓ Incomplete

Required fields complete

The “Questions” section is the heart of the Contract Request Form, and it may be navigated by either the menu, the blue links, or the “Next” button

[← Previous](#)

Next >

The Questions section features many questions that are “conditional”, which means that, depending on how you answer a question, additional questions and/or sections may appear. Examples are provided on Pages 15-21 of this Guide.

Here are examples of an instruction to add an Attachment as mentioned on page 5.

Required fields are designated by a star * icon.

TARLETON STATE UNIVERSITY
UNIVERSITY OF THE STATE OF TEXAS SYSTEM

Contracts > Requests > My Contract Requests

TSU Demo

Form Number: 2874526
Request Status: Incomplete

Instructions
Details
Attachments 0
Questions ✓
Contract Information ✓
Routing Determination ✓
Departmental Information ✓
Back Office ✓
Review and Complete
Discussion
Contract Request Workflow

Questions - Contract Information

▼ On This Page
[Monetary Information \(8\)](#)
[Contract Summary \(8\)](#)

▼ Monetary Information
Is this a Monetary Contract? *
☐ Yes ☐ No

▼ Contract Summary
If the detailed description/scope of this Contract will not fit in the field provided below, please enter "see attached" and then attach in the "Attachments" section a Word document containing the description/scope.
If the scope of this Contract includes products and/or services that should be itemized, please [use this template](#) to list each of them separately. Attach the completed template to this Contract Request in the "Attachments" section.

Enter a brief Summary of this Contract's Scope *

2000 characters remaining

Is this a New or Existing Contract?

Start Date *

mm/dd/yyyy
☐ Update Start Date Upon Execution

End Date *
☐ Expires On ☐ No Expiration

Has the Contractor/Supplier furnished a Contract document *
☐ Yes ☐ No

* Required

< Previous Save Progress Next >

“Departments” are called “Work Groups” in the system. When searching for your department’s name, be sure to drill down to where it appears without a preceding arrow (>). For example, for TSU’s Athletics Department “Athletics” would be selected, not “Athletic Department”.

TSU Demo

Form Number: 2874526
Request Status: Incomplete

Questions - Departmental Information

Departmental Contact Info

After selecting the applicable A&M System Member ID, follow these steps:

1. Click the *spyglass* icon in the Department Name field
2. From the list of Work Groups, drill down to your specific department "CLM"
3. Continue to drill down by clicking the arrows (>) until your specific department/unit name appears and click the circle (o) to select it

WARNING: Although they appear to be selectable, **DO NOT SELECT ANY COLLEGE, DEPARTMENT, OR UNIT NAME THAT IS PRECEDED BY AN (>)**. Doing so will result in your Request Form being returned to you. Your selection should only be preceded by a circle (o).

Example for choosing Petroleum Engineering at Texas A&M University:

- Select 02-Texas A&M University
- click the > next to CLM – Texas A&M University
- click the > next to College of Engineering
- click the O next to Petroleum Engineering

A&M System Member ID *

Department Name *

Type to filter...

Department Code (include Member Number and Department abbreviation [EX: 02-PURS]) *

Primary Contact's Name: *

Primary Contact's Address: *

Primary Contact's City/State/Zip: *

Primary Contact's Email Address *

Primary Contact's Phone Number (xxx-yyy-zzzz) *

Primary Contact's Fax Number (xxx-yyy-zzzz)

Is the "Contract Notice" designee different than the Primary Contact Person? *

☐ Yes ☐ No

★ Required

< Previous Save Progress Next >

Work Groups

AgriLife - Extension
AgriLife - Research
> CLM - Health Science Center
> CLM - TAMU-Galveston
CLM - Tarleton State University
> Academic Affairs
Athletic Department
Administration
Athletics
Baseball
Basketball - Men's
Basketball - Women's
Cheerleading
Cross Country
Football
Golf
Softball
Sports Medicine
Strength & Conditioning
Tennis
Track & Field
Volleyball
Center for Environmental Studies
> College of Agriculture & Environmental Studies
> College of Business Administration
> College of Education

Next >

The “Back Office” section is intended for use only by Procurement Services, Contract Administration, and Commodity Code Assigners (at TAMU, they are within the FMO group) as they review and help complete the Contract Request Form. *NOTE: The check mark beside the Back Office section defaults to green, while the check marks beside the other sections will turn green when the section is completed.*

The “Review and Complete” section indicates the overall completion status of the Request Form. When all sections are completed, the “Complete Request” button becomes active.

TARLETON STATE UNIVERSITY
Member of The Texas A&M University System

Contracts ▶ Requests ▶ My Contract Requests

< Back to My Contract Requests

TSU Demo

Form Number: 2874526
Request Status: Incomplete

Instructions

Details

Attachments 0

Questions ✓

Contract Information ✓

Routing Determination ✓

Departmental Information ✓

Back Office ✓

Review and Complete

Discussion

Contract Request Workflow

Discussion

Start New Thread

There are no message threads in for this request.

The "Discussion" section allow you to post messages to, and receive replies from, anyone who has access to the Request Form, such as your Approvers and Procurement/Contract Management personnel. Clicking the "Start New Thread" button pops-up the Message box.

NOTES:

- *This messaging feature does not send emails to the recipients.*
- *Attachments can be added to a message. This attachment location should not be used for the type of Attachments addressed on Page 4 of this Guide.*

Post a New Message ✕

Subject ★

Message ★

4972 characters remaining

Add Attachments

★ Required

Post Message Close

The next seven pages demonstrate the “conditional” nature of some of the questions you may encounter on the Contract Request Form. Notice that when this question is answered “Yes” and the “Save Progress” button is clicked, a Question section named “Award Documents” does not appear.

TARLETON STATE UNIVERSITY
UNIVERSITY OF THE STATE OF TEXAS

Contracts > Requests > My Contract Requests

[Back to My Contract Requests](#)

TSU Demo

Form Number: 2874526
Request Status: Incomplete

Instructions
Details
Attachments 0
Questions ✓

Contract Information ✓

Routing Determination ✓

Departmental Information ✓

Back Office ✓

Review and Complete

Discussion

Contract Request Workflow

Questions - Contract Information

On This Page

[Monetary Information \(8\)](#)
[Contract Summary \(8\)](#)

Monetary Information

Is this a Monetary Contract? *

☐ Yes ☐ No

Contract Summary

If the detailed description/scope of this Contract will not fit in the field provided below, please enter "see attached" and then attach in the "Attachments" section a Word document containing the description/scope.

If the scope of this Contract includes products and/or services that should be itemized, please [use this template](#) to list each of them separately. Attach the completed template to this Contract Request in the "Attachments" section.

Enter a brief Summary of this Contract's Scope *

2000 characters remaining

Is this a New or Existing Contract?

Start Date *

mm/dd/yyyy

☐ Update Start Date Upon Execution

End Date *

☐ Expires On ☐ No Expiration

Has the Contractor/Supplier furnished a Contract document? *

☒ Yes ☐ No

★ Required

[Previous](#) [Save Progress](#) [Next](#)

TARLETON STATE UNIVERSITY
Division of the State Fair University System

Contracts > Requests > My Contract Requests

[Back to My Contract Requests](#)

TSU Demo

Form Number: 2874526
Request Status: Incomplete

Instructions
Details
Attachments 0
Questions ✓
Contract Information ✓
Routing Determination ✓
Award Documents ✓
Departmental Information ✓
Back Office ✓
Review and Complete
Discussion
Contract Request Workflow

Questions - Contract Information

On This Page
[Monetary Information \(8\)](#)
[Contract Summary \(8\)](#)

Monetary Information

Is this a Monetary Contract? *

☐ Yes ☐ No

Contract Summary

If the detailed description/scope of this Contract will not fit in the field provided below, please enter "see attached" and then attach in the "Attachments" section a Word document containing the description/scope.

If the scope of this Contract includes products and/or services that should be itemized, please [use this template](#) to list each of them separately. Attach the completed template to this Contract Request in the "Attachments" section.

Enter a brief Summary of this Contract's Scope *

2000 characters remaining

Is this a New or Existing Contract?

Start Date *

mm/dd/yyyy

☐ Update Start Date Upon Execution

End Date *

☐ Expires On ☐ No Expiration

Has the Contractor/Supplier furnished a Contract document? *

☐ Yes ☒ No

★ Required

[Previous](#) [Save Progress](#) [Next >](#)

However, when the same question is answered "No" and the "Save Progress" button is clicked, the Question section named "Award Documents" does appear.

Another aspect of “conditionality” is demonstrated from the “Award Documents” screen, on which a dropdown list appears with the name of every type of Award Document identified by your Contract Administration office. These correspond with the types of “templates” used with the former system. In this system, selecting an Award Document type presents questions that are specific to the type of Award Document.

TARLETON STATE UNIVERSITY

UNIVERSITY OF THE TEXAS SYSTEM

Contracts > Requests > My Contract Requests

< Back to My Contract Requests

TSU Demo

Form Number: 2874526

Request Status: Incomplete

Instructions

Details

Attachments 0

Questions

Contract Information

Routing Determination

Award Documents

Departmental Information

Back Office

Review and Complete

Discussion

Contract Request Workflow

Questions - Award Documents

Contract Award Document - A&M System M

Select Award Document: *

Inter-Agency Agreement

Inter-Agency Agreement

Receiving Party: *

Performing Party: *

(IAA) Enter a detailed Basis for Calculating Reimbursable Costs, OR, attach a document which contains a detailed Basis for Calculating Reimbursable Costs in the "Attachments" section. *

2000 characters remaining

Not to Exceed \$ Amount: *

(IAA) Payment Schedule/Frequency *

★ Required

< Previous

Save Progress

Next >

For example, if Award Document type “Inter-Agency Agreement” is selected, clicking the “Next” button results in the appearance of these questions specific to the type. *NOTE: It is possible that some questions that appear “conditionally” might also, depending on how they are answered, make additional questions appear.*

Questions - Routing Determination

Print Request | History | ?

Contract Request Workflow

▼ Electronic Information Resources (EIR)

EIR Definitions:

Computer Software: includes digital information such as i) multimedia resources like videos, podcasts, or associated interfaces; and ii) websites, web applications, or web portals (also

Computer hardware
laboratory equipment

Cloud computing
Special Publication

~~Electronic and Information Conversion, or during Internet websites~~

~~Medical Equipment~~

~~Research tools: in~~

User Interface: a apps, form-based interfaces.

WARNING: If you do not attach the documentation requested in this section, this Contract Request will be returned.

If you have any questions concerning Electronic Information Resources, please contact your Member's IT Accessibility Office.

If this Contract Request involves an EIR, please select which of the following EIR's will be purchased under this Contract. If the request does not involve an EIR, select "This purchase does not involve an EIR." ★

Audio, video, or multimedia con

My A&M System Member is:

04-Tarleton State University

★ Required

Since question “conditionality” is such a prominent feature of the Contract Request Form, two more examples are presented on the next three pages:

Selecting any menu option other than “This purchase does not involve an EIR listed above” and clicking the “Save Progress” button adds the “Electronic Information Resources” Question section.

Computer software or software applications (includes managed services Contracts)

Computer hardware

Cloud computing services

Medical equipment with embedded information technologies

Research tools

Audio, video, or multimedia component

Telephones or telecommunications products

Websites, web/mobile applications, and/or web development services to create and modify them

Other technologies not listed above

More than one EIR listed above is involved with this purchase

This purchase does not involve an EIR listed above

Next ➤

Questions - Electronic Information Resources (EIR)

Print Request History ?

▼ Electronic Information Resources (EIR)

Single User EIR Guidelines

Has IT Accessibility completed a review/approval of this contract? If yes, please attach ALL documentation of IT Accessibility's review/approval in the Attachments section. ★

☒ Yes ☐ No

The first question that appears in the “Electronic Information Resources” section is a conditional Yes/No question. Selecting “Yes” and clicking the “Save Progress” button does not result in the appearance of any additional questions.

★ Required

[< Previous](#)

Save Progress

Next ➤



Age Group	Number of People
18-24	10
25-34	15
35-44	20
45-54	12

100

Print Request | History | ?

Single User EIR Guidelines

☐ Yes ☒ No

☐ Yes ☐ No

★ Required

However, selecting “No” and clicking the “Save Progress” button does result in the appearance of an additional question.

[← Previous](#)

Save Progress

Next ➤

If you do not complete your Contract Request Form during a login session, you may find and return to it by selecting “My Contract Requests” from the fly-out menu. **NOTE: Be sure you hit the “Save Progress” button before exiting out of any Request Form you have not yet completed!**

The screenshot displays the Tarleton State University AggieBuy website. The header includes the university logo and navigation links like "Shop", "Shopping", and "Shopping Home". A vertical sidebar on the left contains icons for home, shopping cart, clock, and user profile. The user profile icon is highlighted with a red box. A fly-out menu is open from this icon, listing "Contracts", "Approvals", "Reports", "Requests", and "My Contract Requests". The "Requests" and "My Contract Requests" items are also highlighted with red boxes. A red arrow points from the "My Contract Requests" item to the callout box. The main content area features a search bar, a "Go to: advanced search" link, and a section titled "Supplies / Furniture / Books" with logos for Staples, Office Depot, Steelcase, and Complete Book. Below this are sections for "Computers / Technology" (shih, BH) and "Scientific & Medical Supplies" (VWR, POSSIBLE MISSIONS, mavich, HENRY SCHEIN).

TARLETON STATE UNIVERSITY
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Shop ▸ Shopping ▸ [Shopping Home](#)

Shop Everyt

Go to: [advanced search](#) |

Type to Search Contracts...

Contracts

Contracts

Approvals

Reports

Requests

My Contract Requests

Request Contract

Search Contract Requests

Supplies / Furniture / Books

Staples Industries
Staples HUB Partner

Office Depot HUB Partner

Steelcase HUB Partner

Complete Book HUB

Tarleton's purchasing and e-commerce website!

Get the latest NEWS about TexanBuy at [AggieBuy.tamu.edu](#)

Get the latest guides and resources available at [AggieBuy.tamu.edu/Training](#)

Computers / Technology

shih
HUB - Computers & Electronics

BH
Audio Visual Equipment

Scientific & Medical Supplies

VWR INTERNATIONAL
SUMMUS/VWR

POSSIBLE MISSIONS
Fisher Scientific HUB Partner

mavich
Medline HUB Partner

HENRY SCHEIN®
Athletic / Medical Supplies

TIP: This is a searchable field.

Shop ▸ Shopping ▸ Shopping Home

Shop Everything

Go to: [advanced search](#) | [favorites](#)

Contracts Type to Search Contracts...

- Contracts ▸ **Search Contracts**
- Approvals View Saved Searches
- Reports Search Contract Parties
- Requests

Advanced Search ?

Summus Industries PDME HBI Complete Book

The “Search Contracts” menu option allows you to search for contracts using basic search parameters. The “Advanced Search” feature allows contracts to be searched by many more of the contracts’ detailed attributes.

Search Contracts

Contract ?

Active for Shopping

By Start/End Date

Created Date

Advanced Search ?

TARLETON STATE UNIVERSITY
Member of The Texas A&M University System

Shop ▸ Shopping ▸ Shopping Home

Shop Everything Go

Go to: [advanced search](#) | [favorites](#) | [forms](#) | [non-catalog item](#) | [quick order](#) Browse: [suppliers](#) | [categories](#) | [contracts](#) | [chemicals](#)

Contracts Type to Search Contracts...

- Contracts ▸ Search Contracts
- Approvals **View Saved Searches**
- Reports Search Contract Parties
- Requests

Featured Suppliers (Suppliers recently added to the MarketPlace)

WorkQuest

Contract searches that you run frequently can be saved, and the procedures for doing so are the same as saving the search parameters for any other document search done in the system. Searches may be saved to only your Personal folder, are to a Shared folder.

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Contracts ▸ Contracts ▸ **View Saved Searches**

Add New ▾

Expand All Collapse All

- Personal
 - Office Supply PO's 2015
- Shared
 - FMO-FTS example reports
 - Procurement Services - Admin
 - Shared Saved Queries

Manage Searches

This "saved searches" page is a filtered view of "favorites." The folders listed on the left contain contract searches that you have saved (listed under "Personal") or contract searches that are being shared with you (listed under "Shared"). To add a contract search to a folder, select the "Save Search" button after performing a contract search and follow the prompts. Use the top-level "favorites" tab to manage (create, delete, move/copy, edit) the folders listed on the left.

TARLETON STATE UNIVERSITY
Member of The Texas A&M University System

Shop ▸ Shopping ▸ Shopping Home

Shop Everything Go

Go to: [advanced search](#) | [favorites](#) | [forms](#) | [non-catalog item](#) | [quick order](#) Browse: [suppliers](#) | [categories](#) | [contracts](#) | [chemicals](#)

Contracts Type to Search Contracts...

- Contracts ▸ Search Contracts
- Approvals View Saved Searches
- Reports Search Contract Parties
- Requests

Highlighted Suppliers (Suppliers recently added to the MarketPlace)

WorkQuest

Welcome to

“Contract Parties” refers to the applicable TAMUS Member (First Party) and the supplier(s) to whom the contract is issued (Second Party).

TARLETON STATE UNIVERSITY
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Contracts ▸ Contracts ▸ Search Contract Parties

Search Contract Parties

Contract Party/Supplier Search by name, DBA, keywords, etc.

Advanced Search ?

TARLETON STATE UNIVERSITY

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Shop

Shopping

Shopping Home

Shop

Everything

Go

Go to: advanced search

Type to Search Contracts...

Q

Contracts

Contracts

Approvals

Reports

Requests

Obligations Across Contracts

Contract “Obligations” refer to tasks or actions that need to be completed for a contract, such as documentation that must be provided, reviews that must be completed, or compliance criteria that a contract must fulfill. Contract Managers, or the Buyers in Procurement Services, add Obligations to a contract, as needed, and inform the person(s) responsible for the Obligation. If you are the responsible person, your Obligations will be found and tracked here.

TARLETON STATE UNIVERSITY

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Contracts

Reports

Obligations Across Contracts

300.0

Obligations Across Contracts

?

Due Date From

mm/dd/yyyy hh:mm a

Due Date To

mm/dd/yyyy hh:mm a

Obligation Status

Overdue ×

Upcoming ×

Q

Tags

Type to filter...

Q

More Options

Clear

Run Report

For Selected Lines

Actions

Occurrence in a Series

Select All

Deselect All

No results found

The next two slides demonstrate how Approvers access the Contract Requests and Contracts they have to Approve.

Approvers may monitor and retrieve the Contracts, and Contract Requests, for which they are the designated Approver by selecting one of these options from the fly-out menu. *NOTE: Either selection takes you to the same screen, which defaults to the option selected. You can easily switch to another option from the dropdown menu as shown on the next page.*

The screenshot displays the Tarleton State University AggieBuy portal. The left sidebar contains a navigation menu with icons for Home, Shopping, and a gear icon. The main content area shows a search bar, a 'Shop' dropdown menu set to 'Everything', and a 'Go' button. Below the search bar, there are links for 'Go to: advanced search | favorites | forms | non-catalog item | quick order' and 'Browse: suppliers | categories | contracts | chemicals'. The 'Contracts' section is highlighted in the sidebar, and a dropdown menu is open, showing options: 'Contracts to Approve', 'Contract Requests to Approve', 'Contracts Recently Approved By Me', 'Contract Requests Recently Approved By Me', 'Assign Substitute Approvers-Contracts', 'Assign Substitute Approvers-ContractRe...', and 'Approval Notifications'. A red box highlights the 'Contracts' section in the sidebar, and another red box highlights the 'Contracts to Approve' and 'Contract Requests to Approve' options in the dropdown menu. A red arrow points from the text box on the right to the 'Contract Requests to Approve' option.

