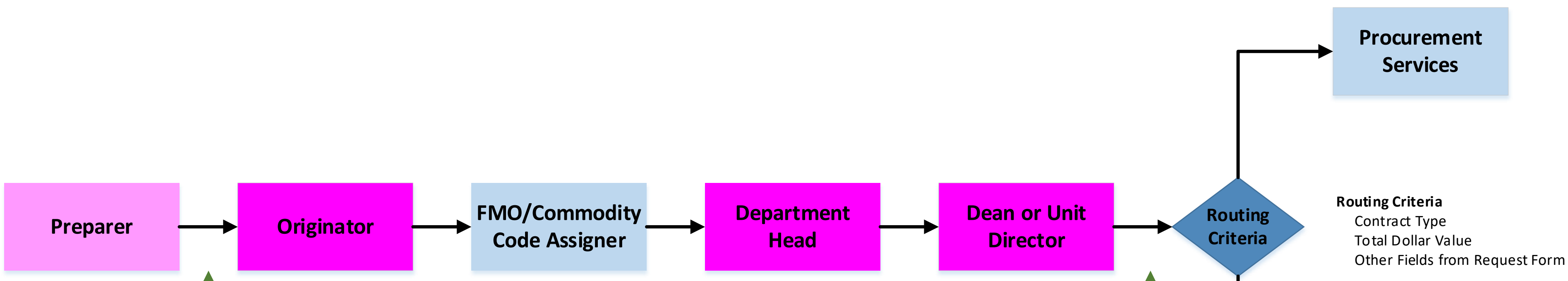
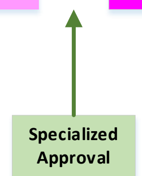
“Contracts+” Application

Contract Request Form Workflow





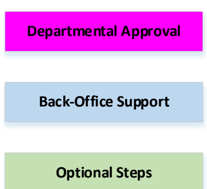
Notes:

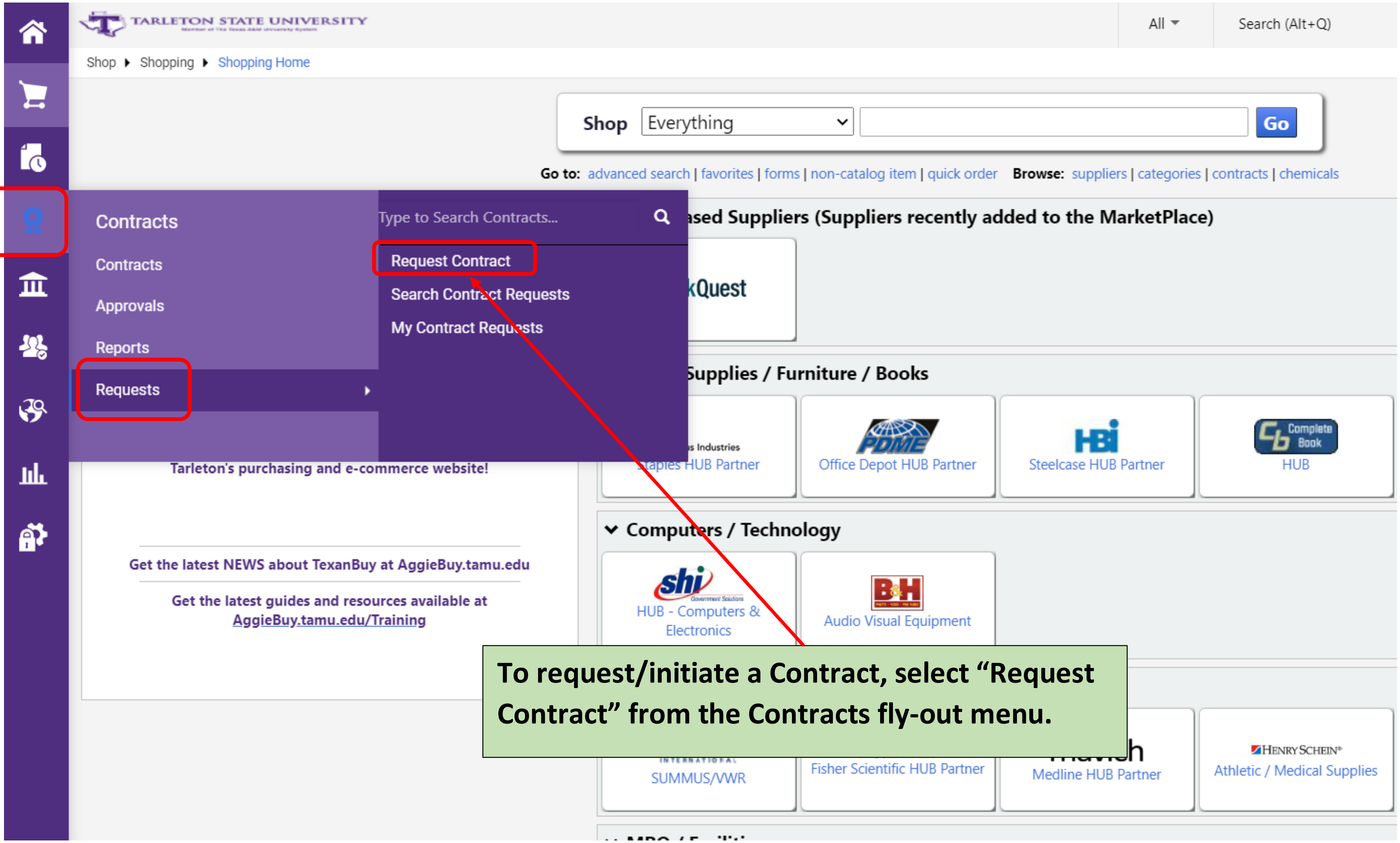
1. The names of the Departmental Approval Steps equate to those on the Contract/Agreement Approval Transmittal Form used previously. Although an Approver in the “Dean or Unit Director” step is required, some departments may not necessarily have Approvers in each of the other steps.

2. The “Preparer” is the person who will access and create a Contract Request. The system permission to do so has been added to the Shopper role, thus a department may assign the duty to any Shopper.

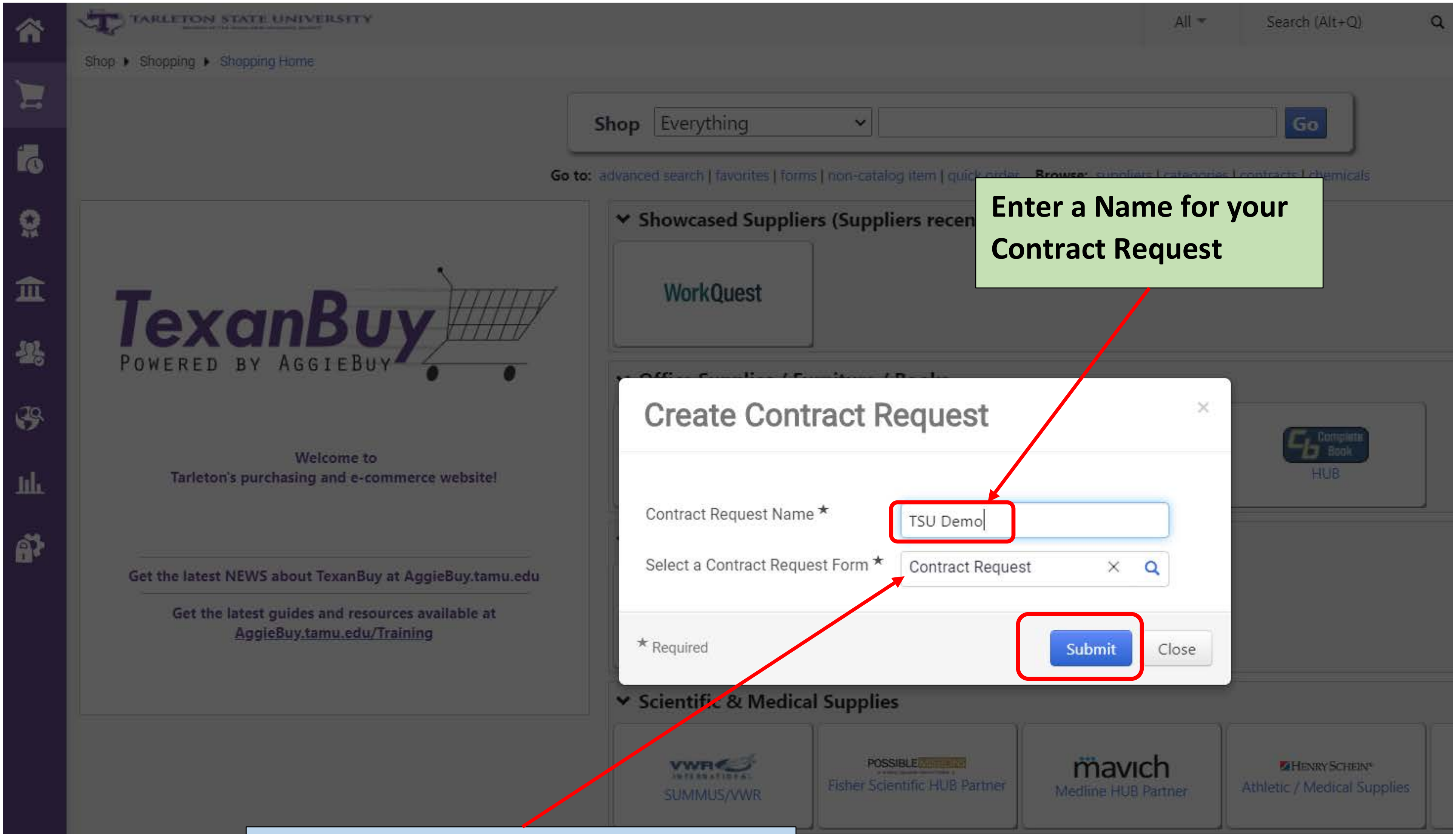
3. As is the case with AggieBuy requisitions, additional steps may be added to a department’s Contract Request workflow, in the sequence as indicated by the green boxes and arrows.

4. “Contracts+” cannot yet be integrated with FAMIS so the Contract Request Form will not be used to initiate contracts that must be encumbered. A requisition must be used instead.



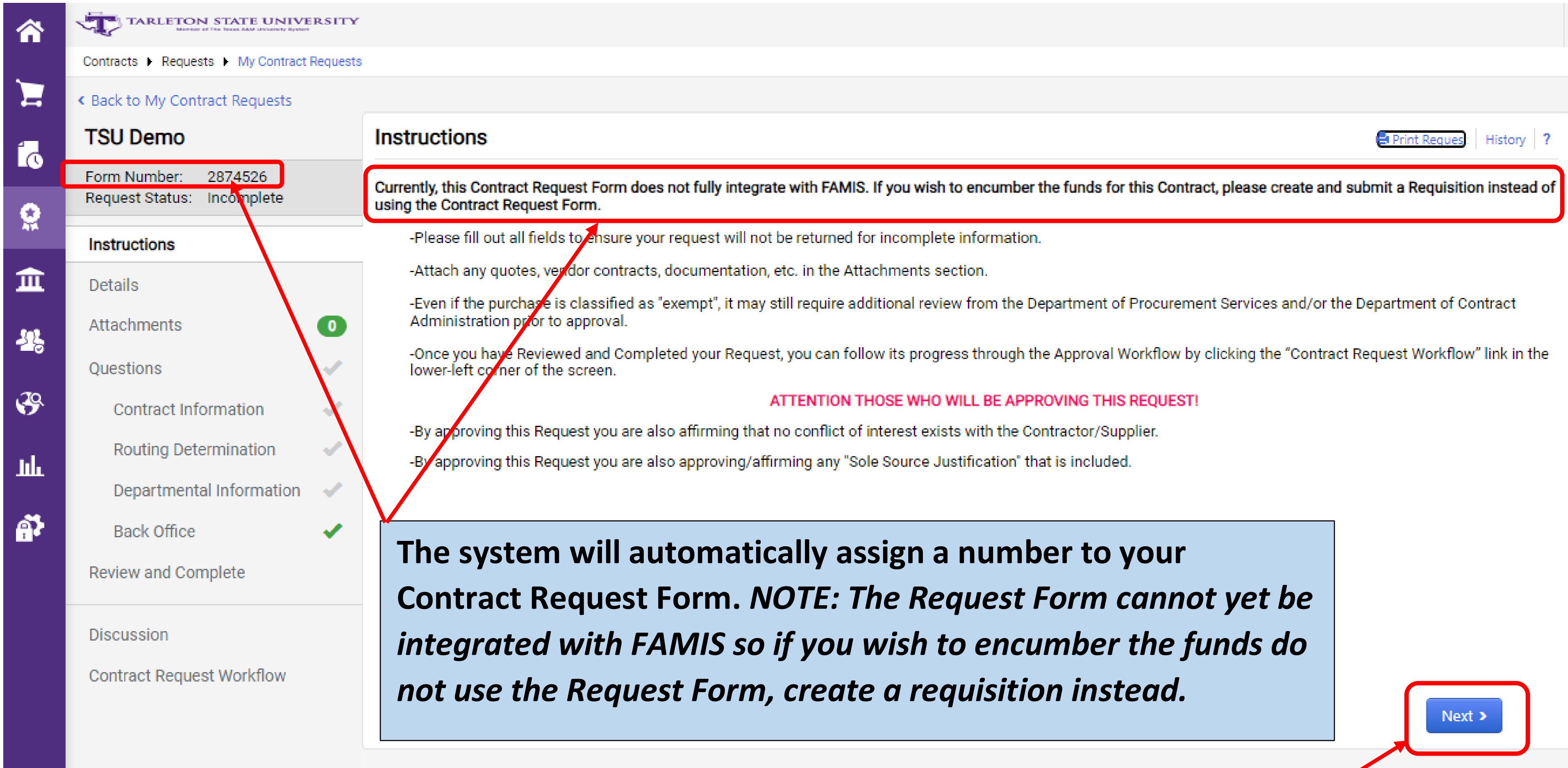


To request/initiate a Contract, select "Request Contract" from the Contracts fly-out menu.



Enter a Name for your Contract Request

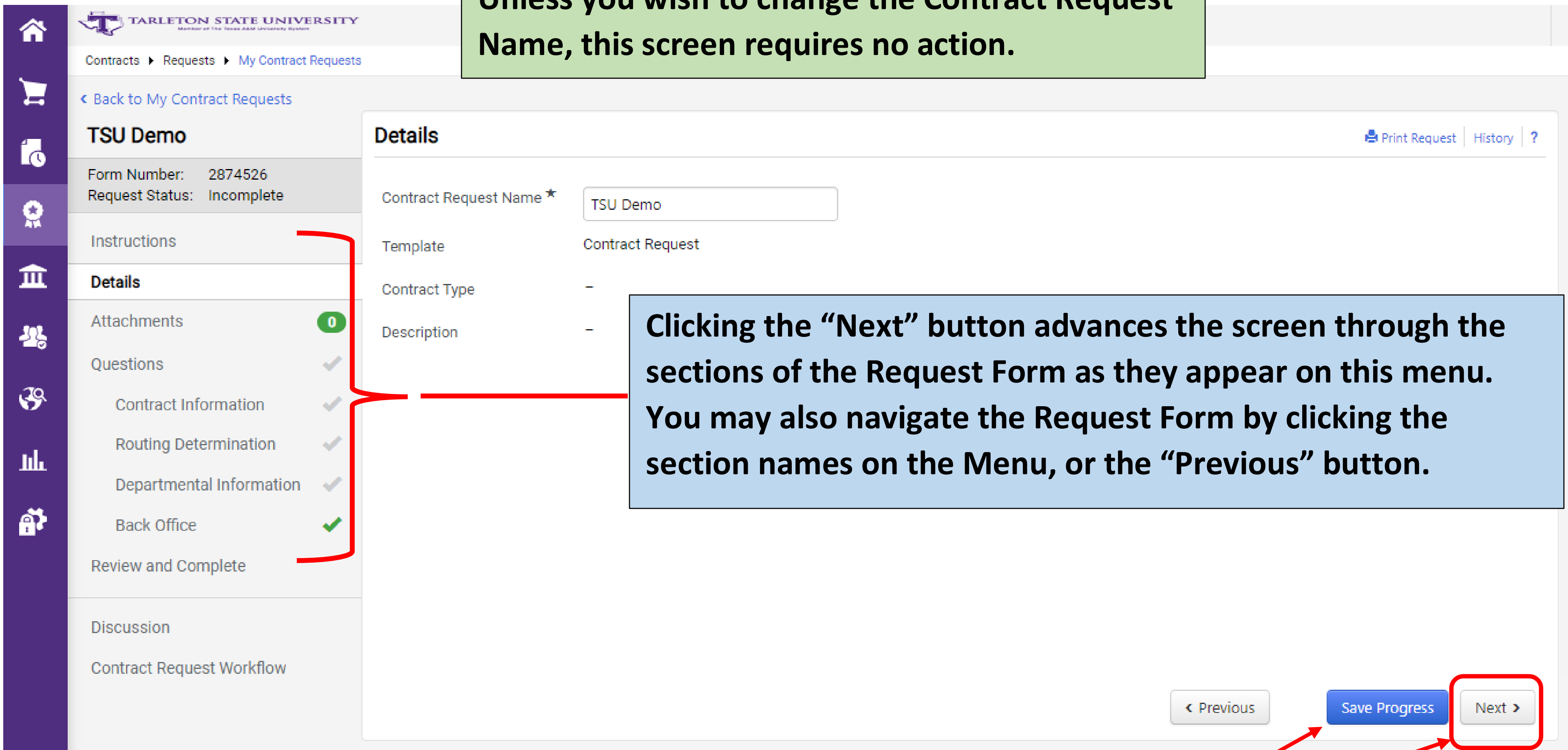
The Contract Request Form field will default to “Contract Request” – do not change or delete.



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.*

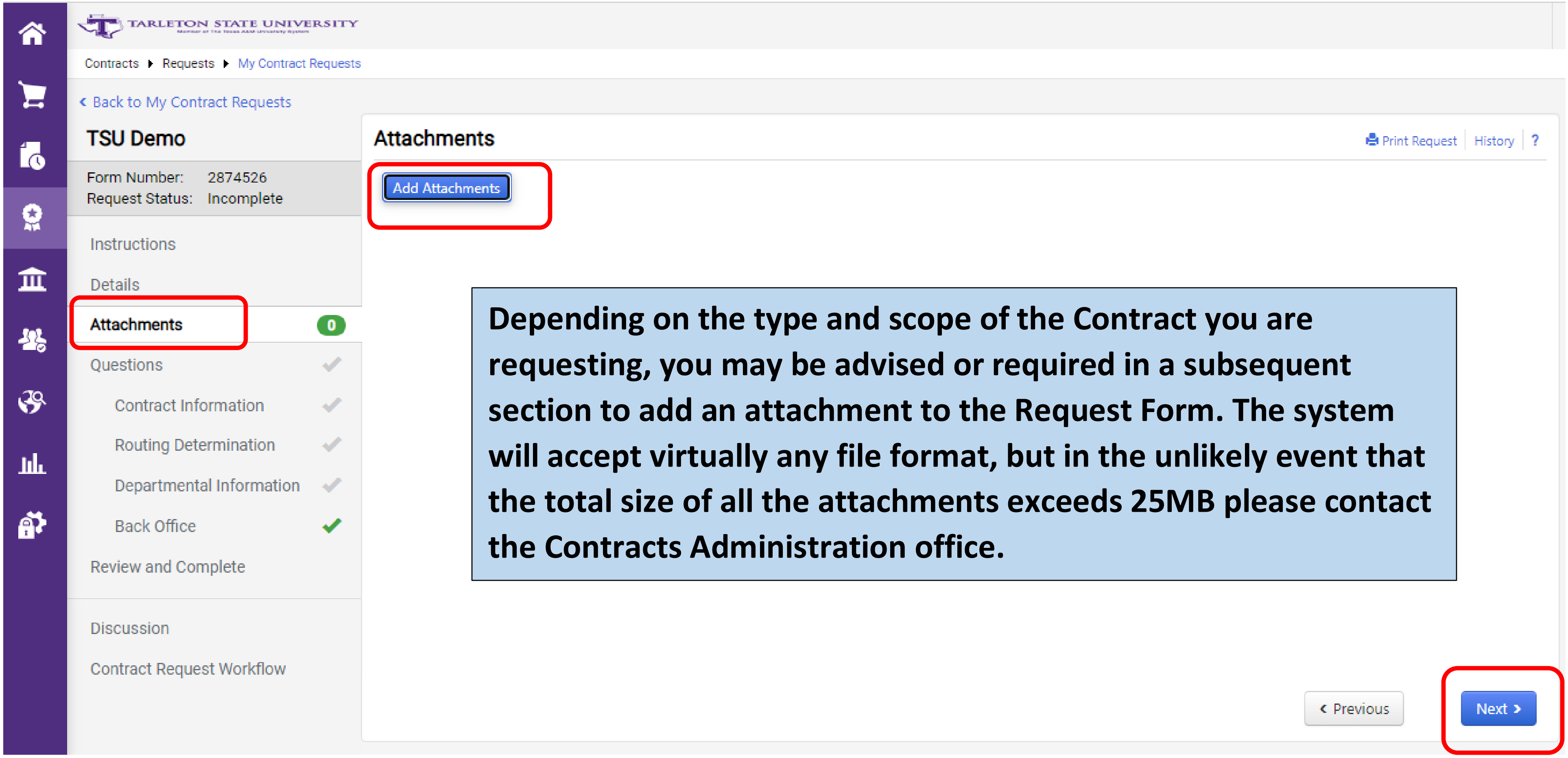
Click the "Next" button to proceed.

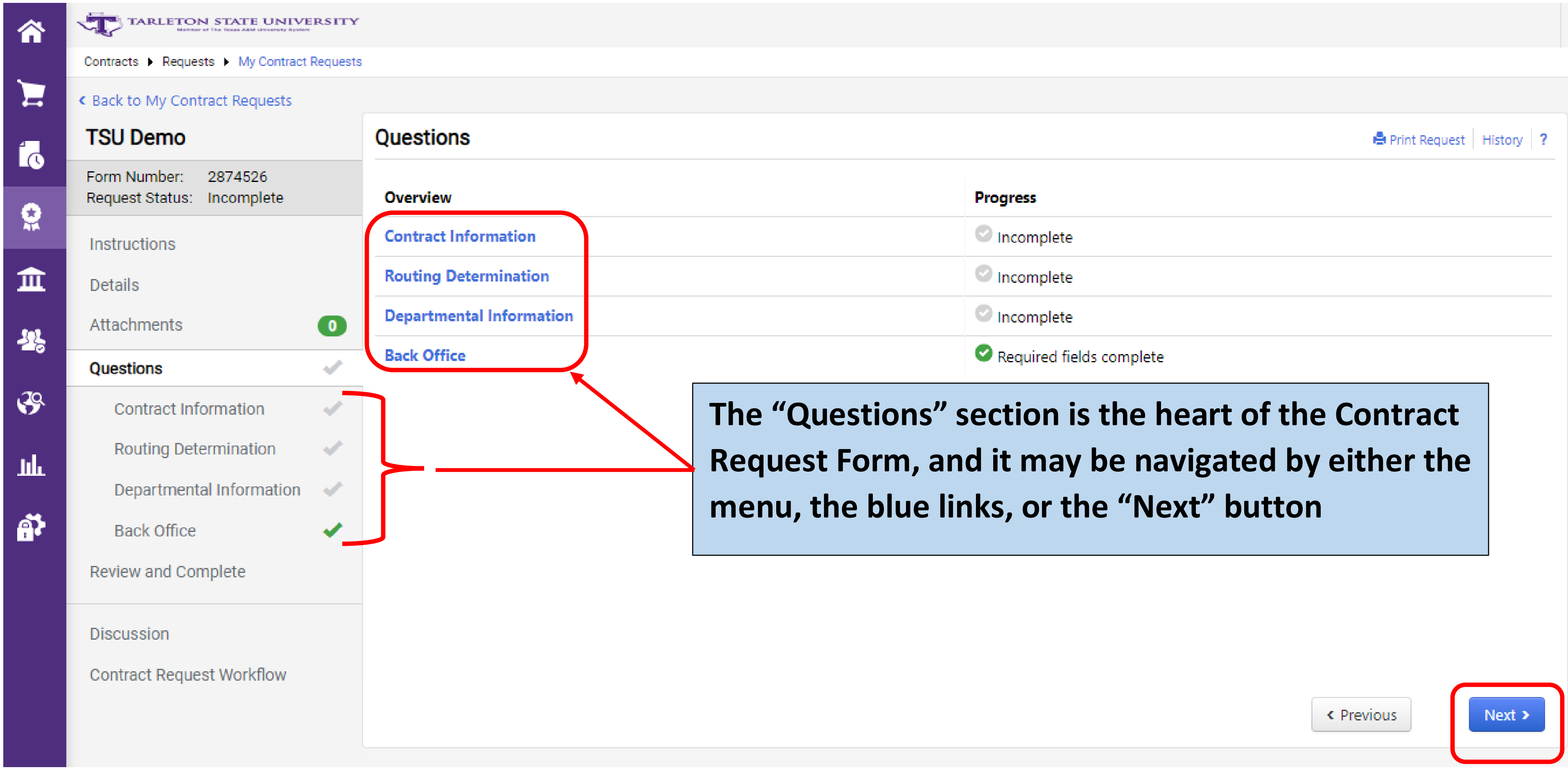
Unless you wish to change the Contract Request Name, this screen requires no action.



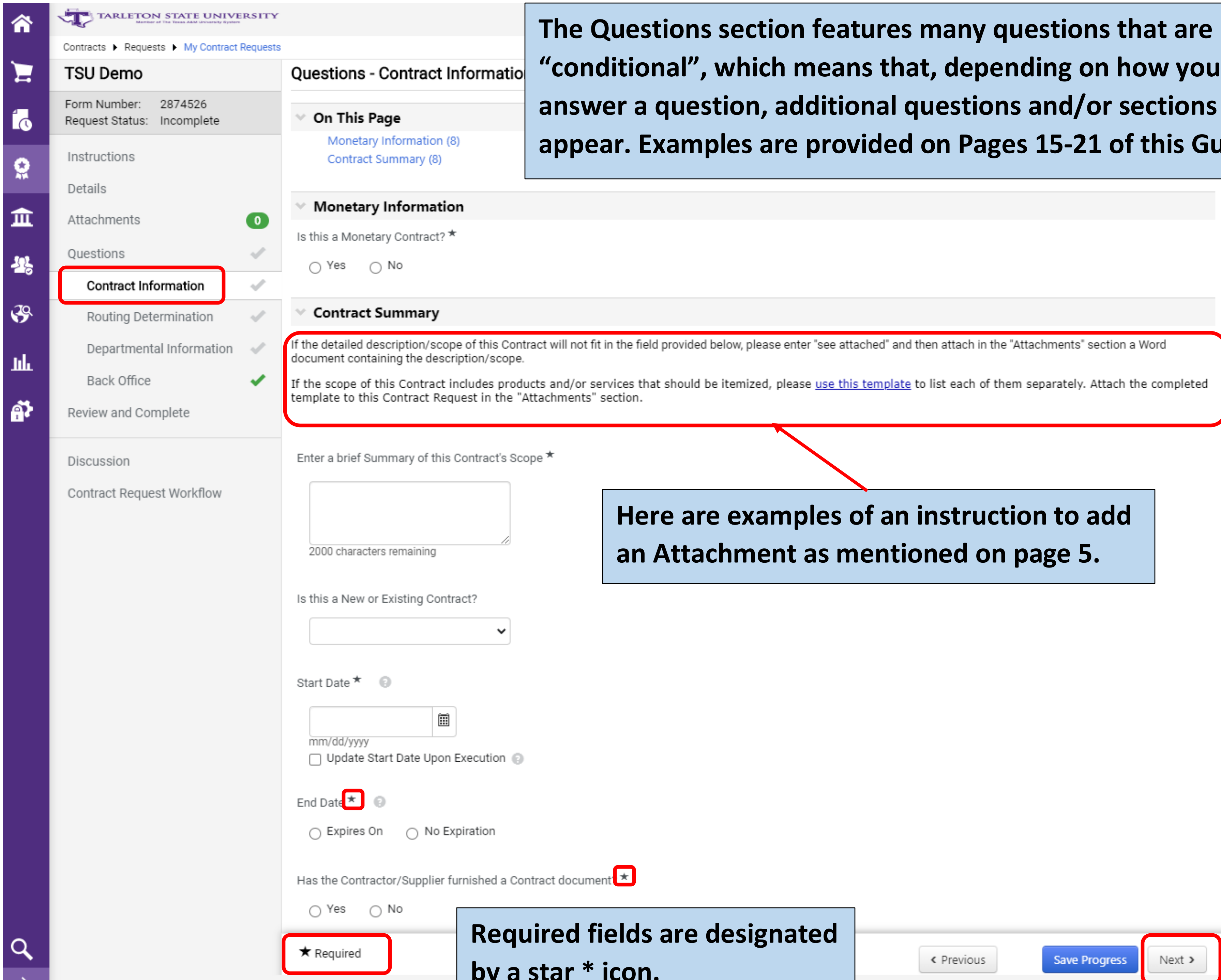
Clicking the "Next" button advances the screen through the sections of the Request Form as they appear on this menu. You may also navigate the Request Form by clicking the section names on the Menu, or the "Previous" button.

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.


TARLETON STATE UNIVERSITY
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
Attachments
Print Request
History
?
Add Attachments
Depending on the type and scope of the Contract you are requesting, you may be advised or required in a subsequent section to add an attachment to the Request Form. The system will accept virtually any file format, but in the unlikely event that the total size of all the attachments exceeds 25MB please contact the Contracts Administration office.
Previous
Next

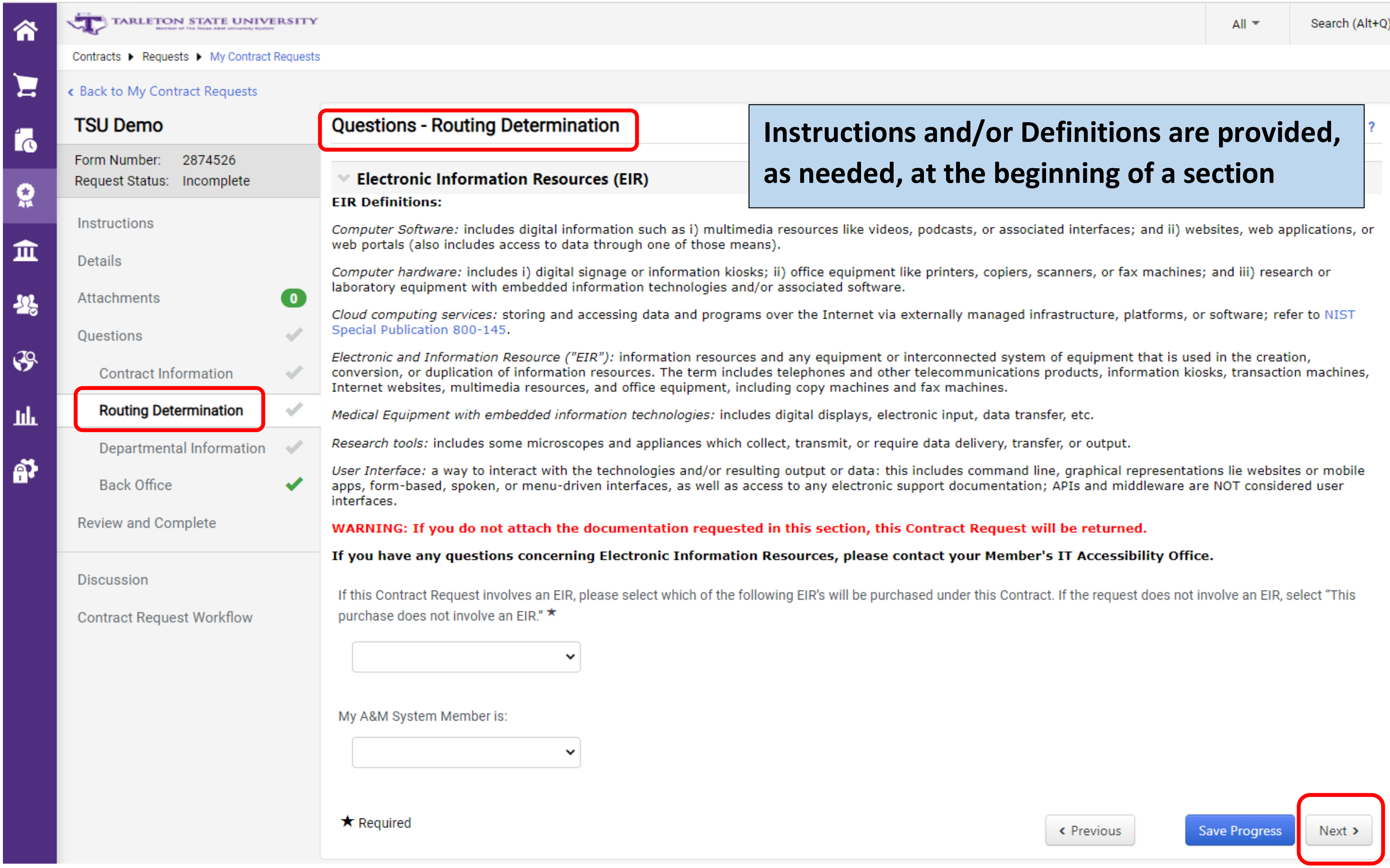

TARLETON STATE UNIVERSITY
Contracts
Requests
My Contract Requests
Back to My Contract Requests
TSU Demo
Form Number: 2874526
Request Status: Incomplete
Instructions
Details
Attachments 0
Questions
Contract Information
Routing Determination
Departmental Information
Back Office
Review and Complete
Discussion
Contract Request Workflow
Questions
Print Request
History
?
Overview
Progress
Contract Information
Incomplete
Routing Determination
Incomplete
Departmental Information
Incomplete
Back Office
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.

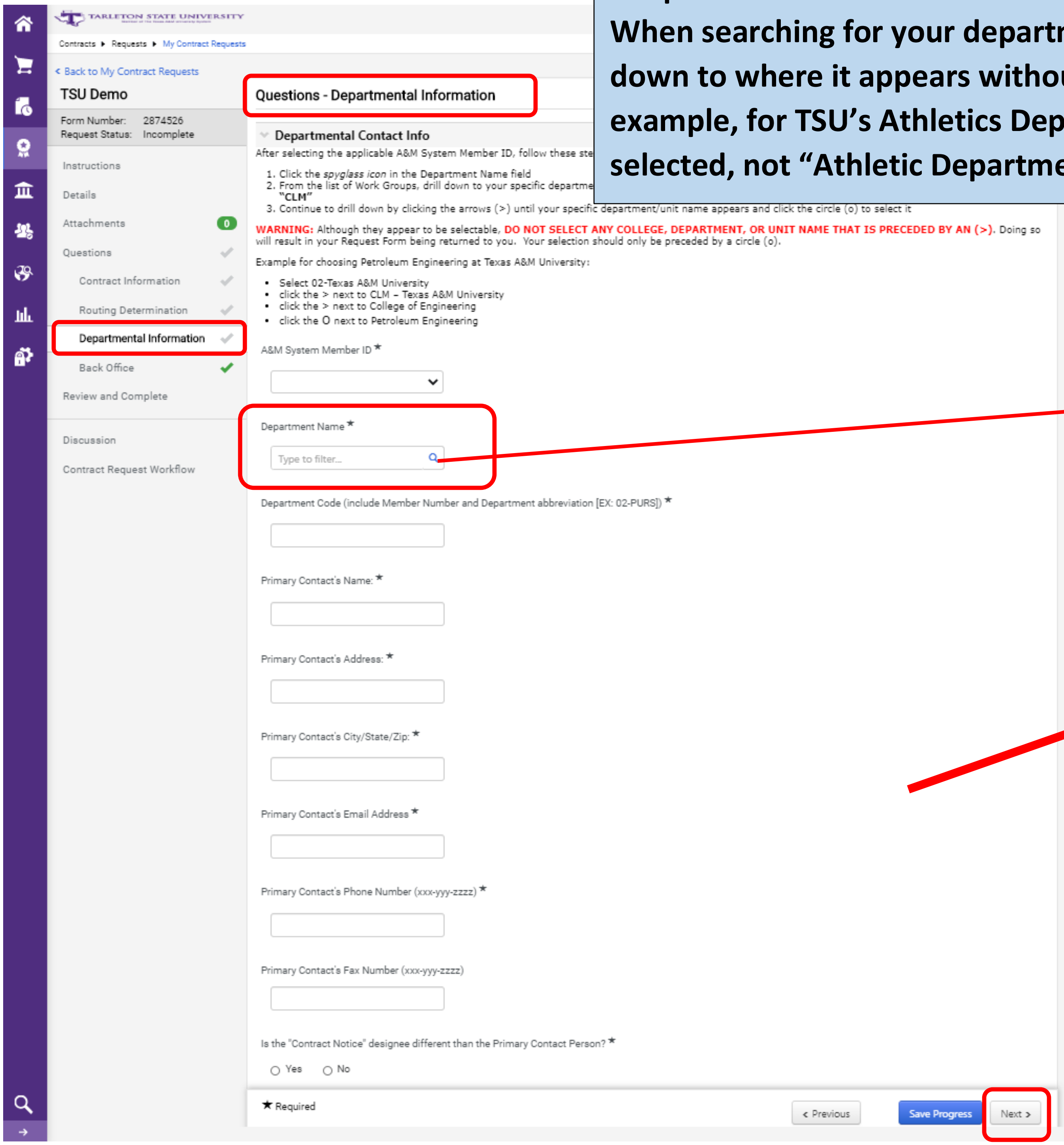


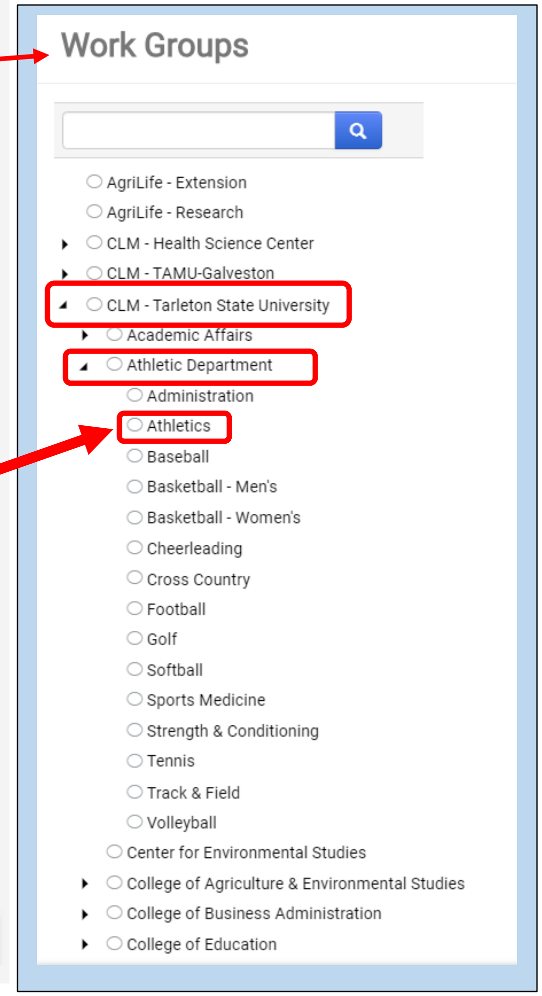
Here are examples of an instruction to add an Attachment as mentioned on page 5.

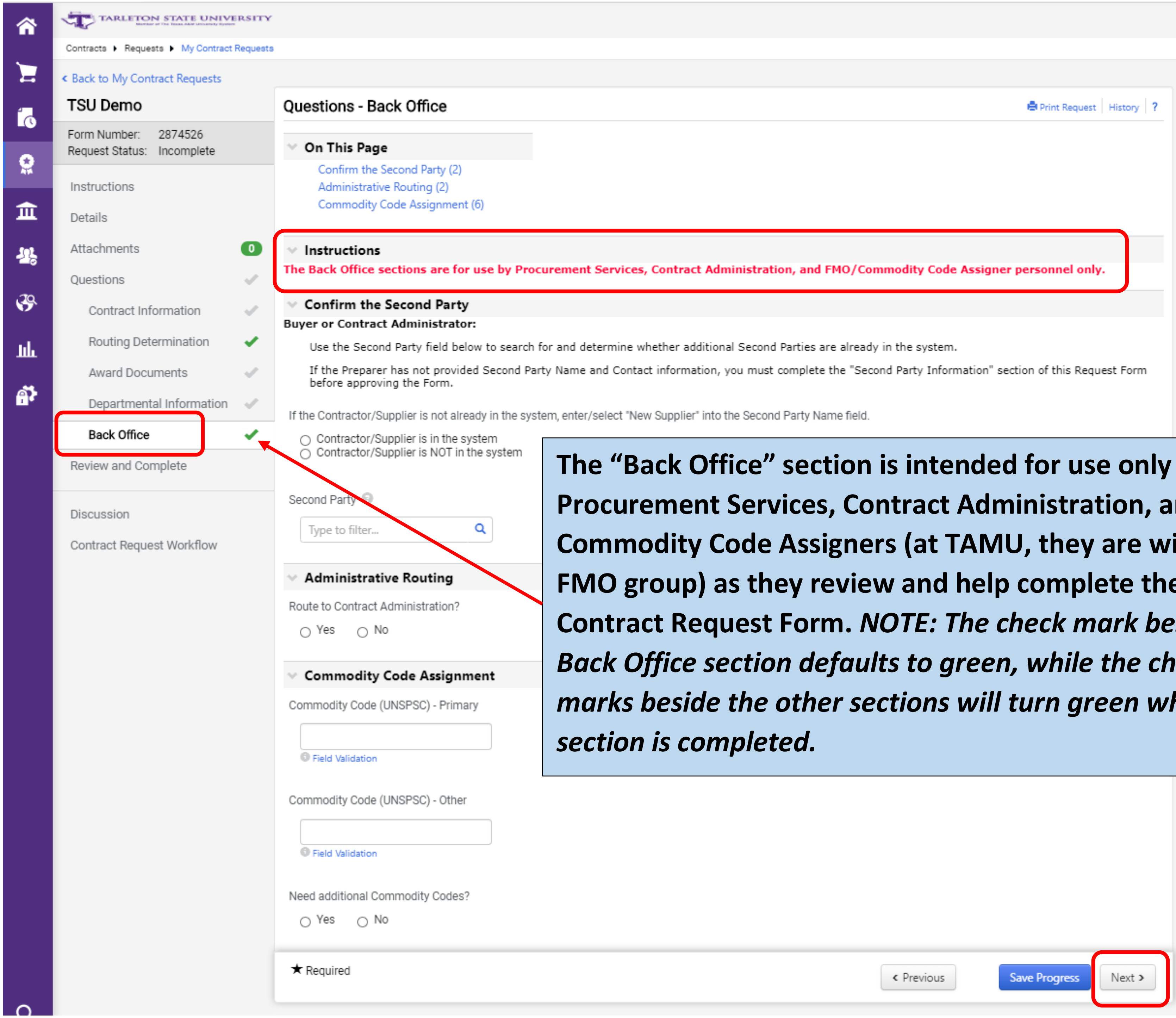
Required fields are designated by a star * icon.


TARLETON STATE UNIVERSITY
All
Search (Alt+Q)
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 - Routing Determination
Instructions and/or Definitions are provided, as needed, at the beginning of a section
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 includes access to data through one of those means).
Computer hardware: includes i) digital signage or information kiosks; ii) office equipment like printers, copiers, scanners, or fax machines; and iii) research or laboratory equipment with embedded information technologies and/or associated software.
Cloud computing services: storing and accessing data and programs over the Internet via externally managed infrastructure, platforms, or software; refer to NIST Special Publication 800-145.
Electronic and Information Resource ("EIR"): information resources and any equipment or interconnected system of equipment that is used in the creation, conversion, or duplication of information resources. The term includes telephones and other telecommunications products, information kiosks, transaction machines, Internet websites, multimedia resources, and office equipment, including copy machines and fax machines.
Medical Equipment with embedded information technologies: includes digital displays, electronic input, data transfer, etc.
Research tools: includes some microscopes and appliances which collect, transmit, or require data delivery, transfer, or output.
User Interface: a way to interact with the technologies and/or resulting output or data: this includes command line, graphical representations lie websites or mobile apps, form-based, spoken, or menu-driven interfaces, as well as access to any electronic support documentation; APIs and middleware are NOT considered user 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." ★
My A&M System Member is:
★ Required
‹ Previous
Save Progress
Next ›

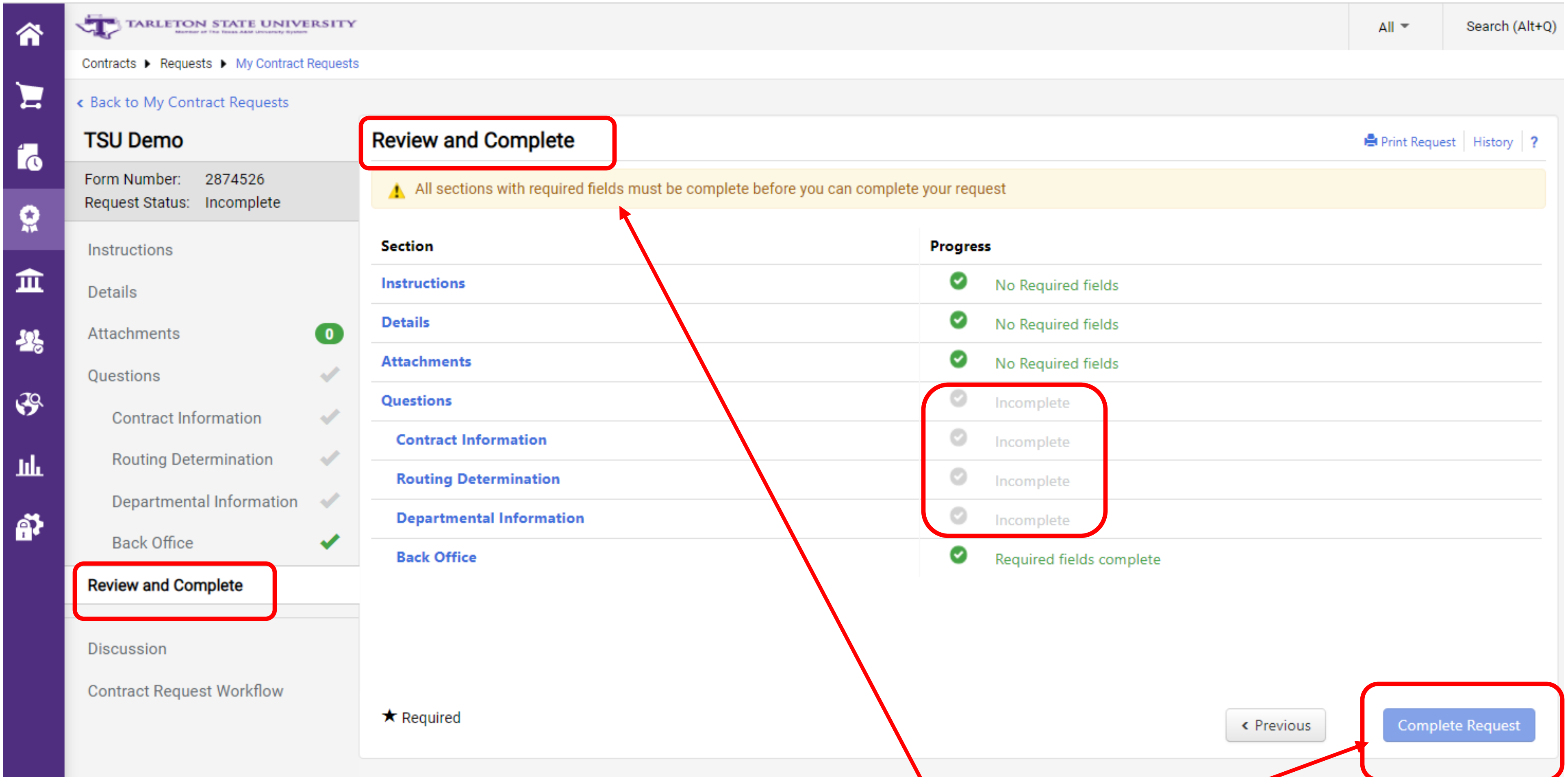
"Departments" are called "Work Groups" in the system. When searching for your department's name, be sure to drill down to where it appears without a preceding arrow (>). For example, for TSU's Athletics Department "Athletics" would be selected, not "Athletic Department".



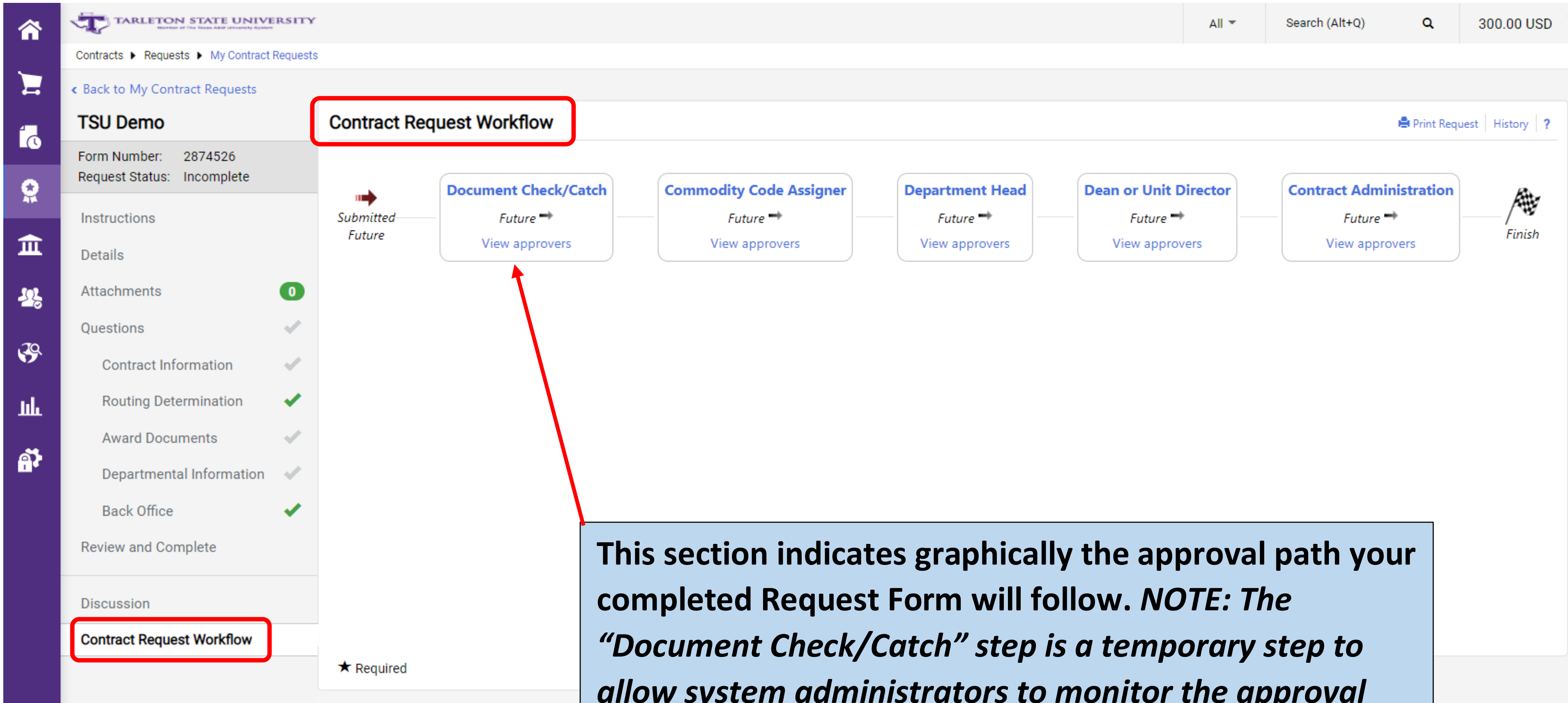




The "Back Office" section is intended for use only by Procurement Services, Contract Administration, and Commodity Code Assigners (at TAMU, they are within the FMO group) as they review and help complete the Contract Request Form. *NOTE: The check mark beside the Back Office section defaults to green,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

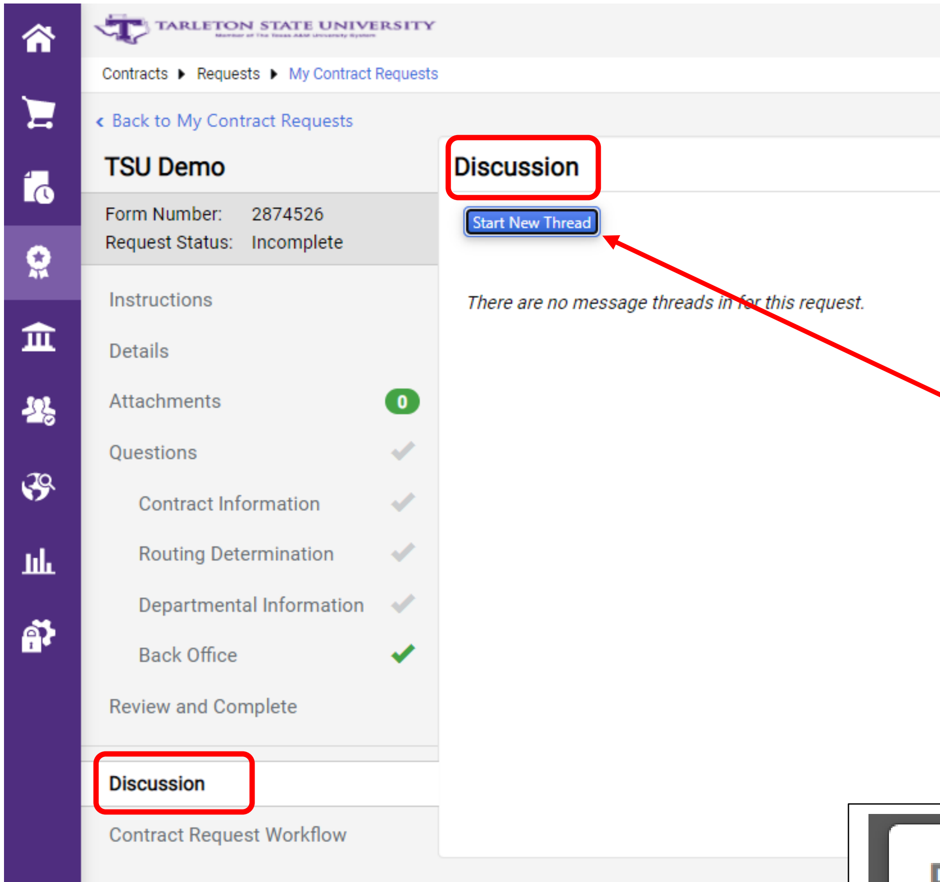


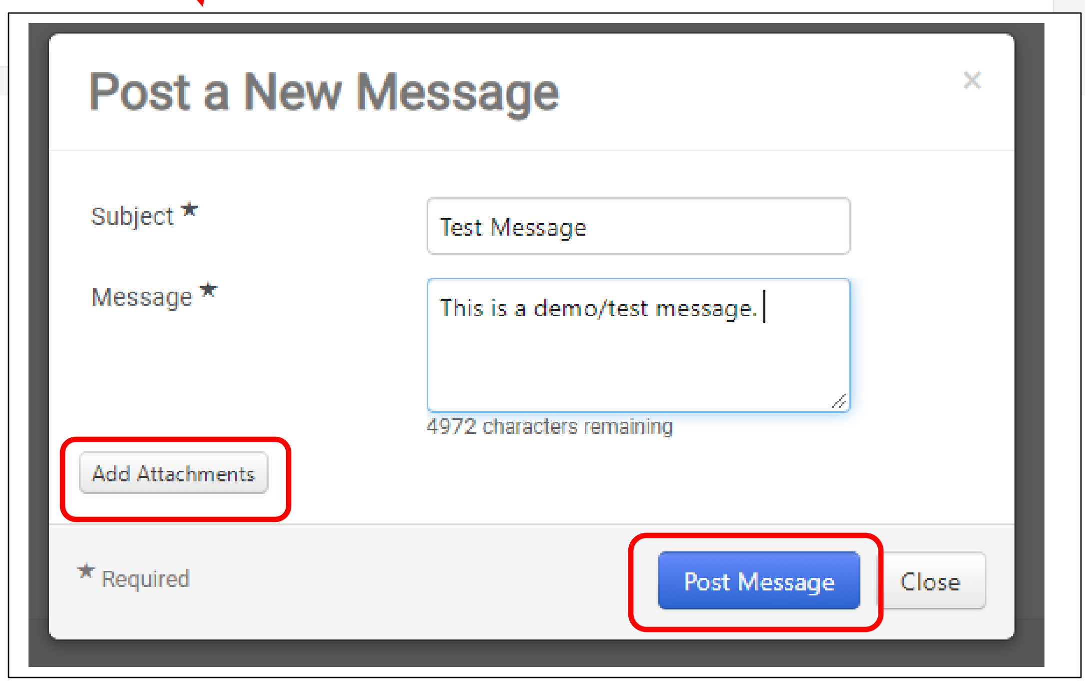
The "Review and Complete" section indicates the overall completion status of the Request Form. When all sections are completed, the "Complete Request" button becomes active.



This section indicates graphically the approval path your completed Request Form will follow. ***NOTE: The "Document Check/Catch" step is a temporary step to allow system administrators to monitor the approval paths during the early days of the system's***

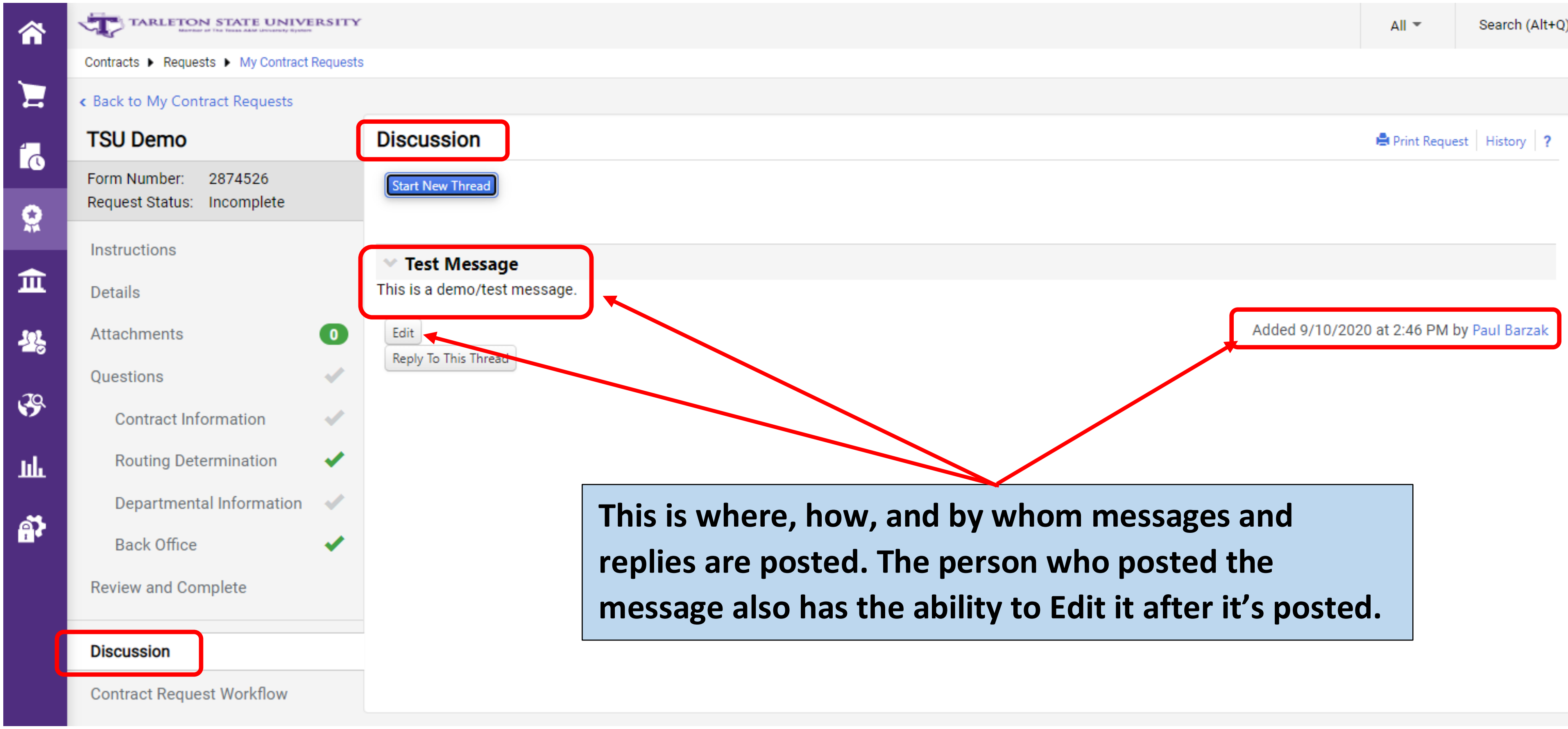
The "Discussion" section allow you to post messages to, and receive replies from, anyone who has access to the Request Form, such as your Approvers and Procurement/Contract Management personnel. Clicking the "Start New Thread" button pops-up the Message box.





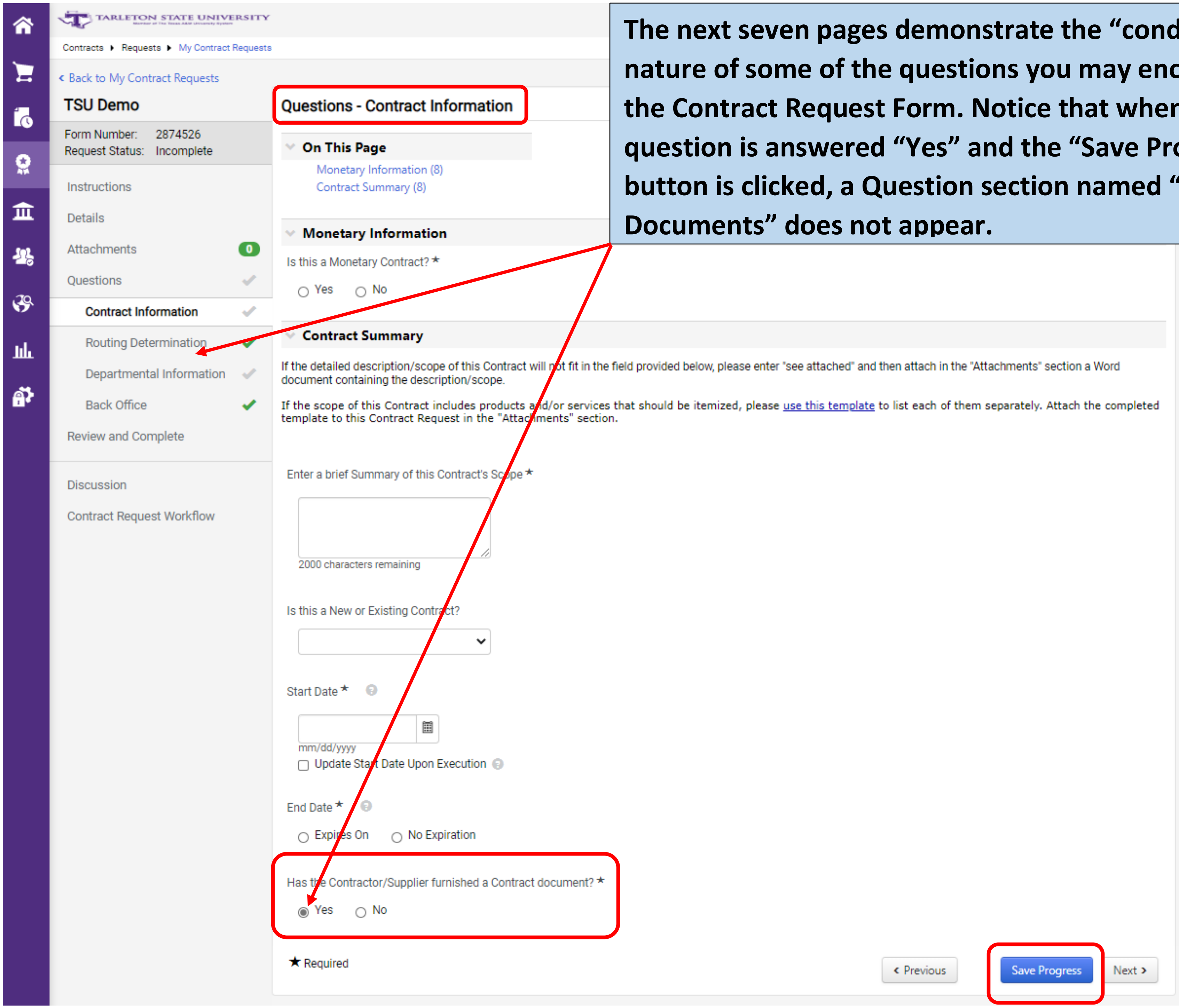
NOTES:

- ***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.***

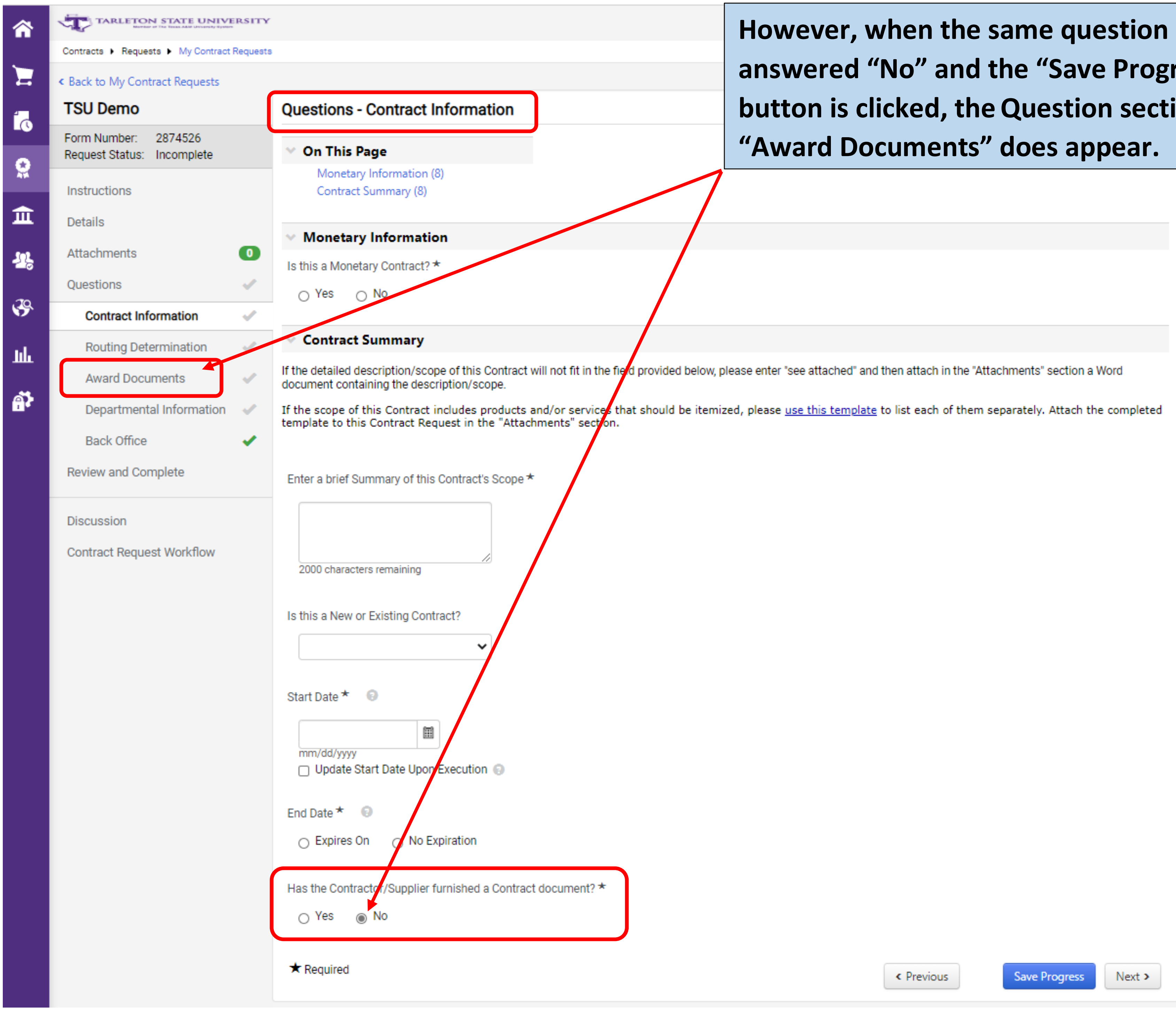


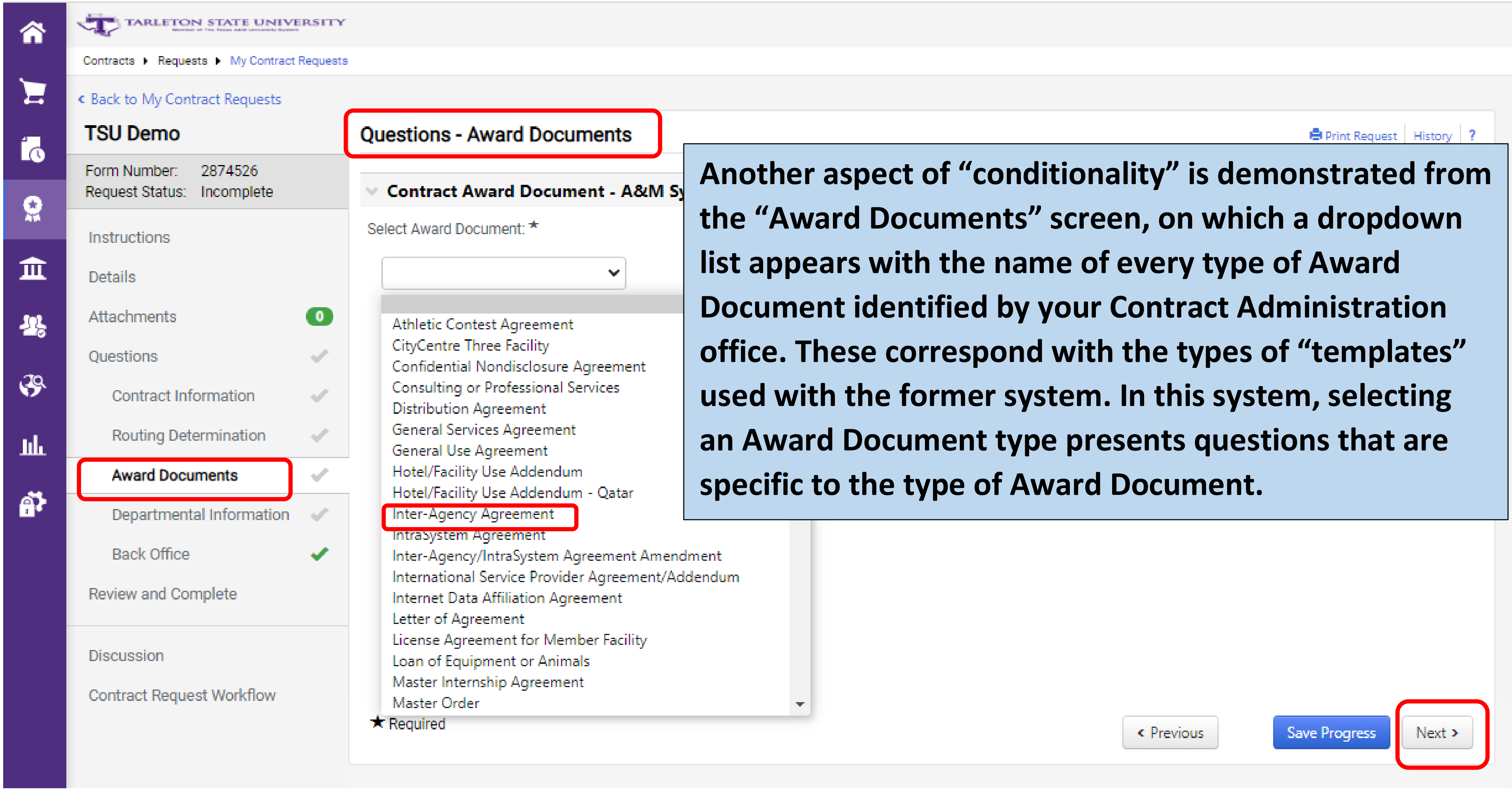
This is where, how, and by whom messages and replies are posted. The person who posted the message also has the ability to Edit it after it's posted.

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.

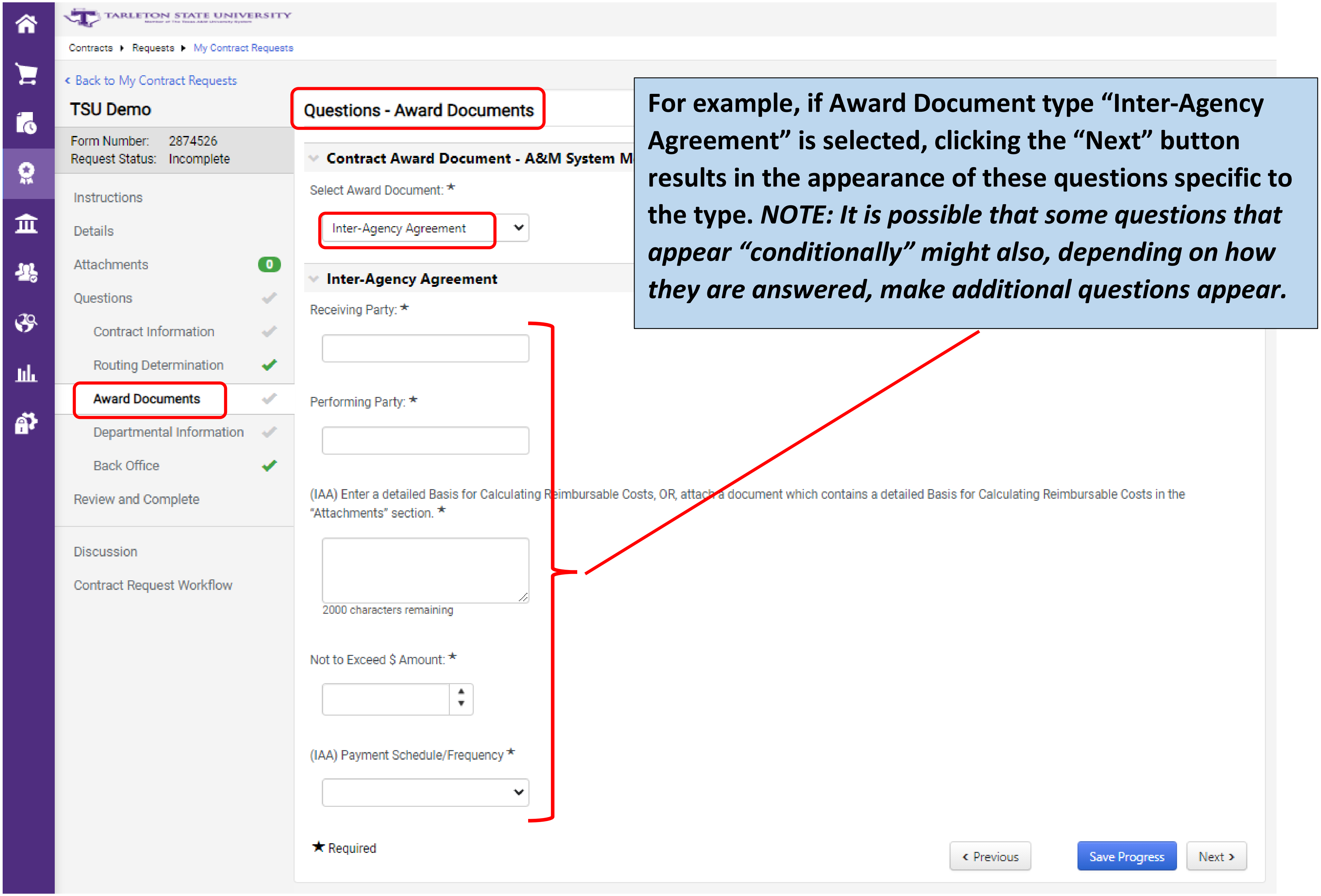


However, when the same question is answered “No” and the “Save Progress” button is clicked, the Question section named “Award Documents” does appear.

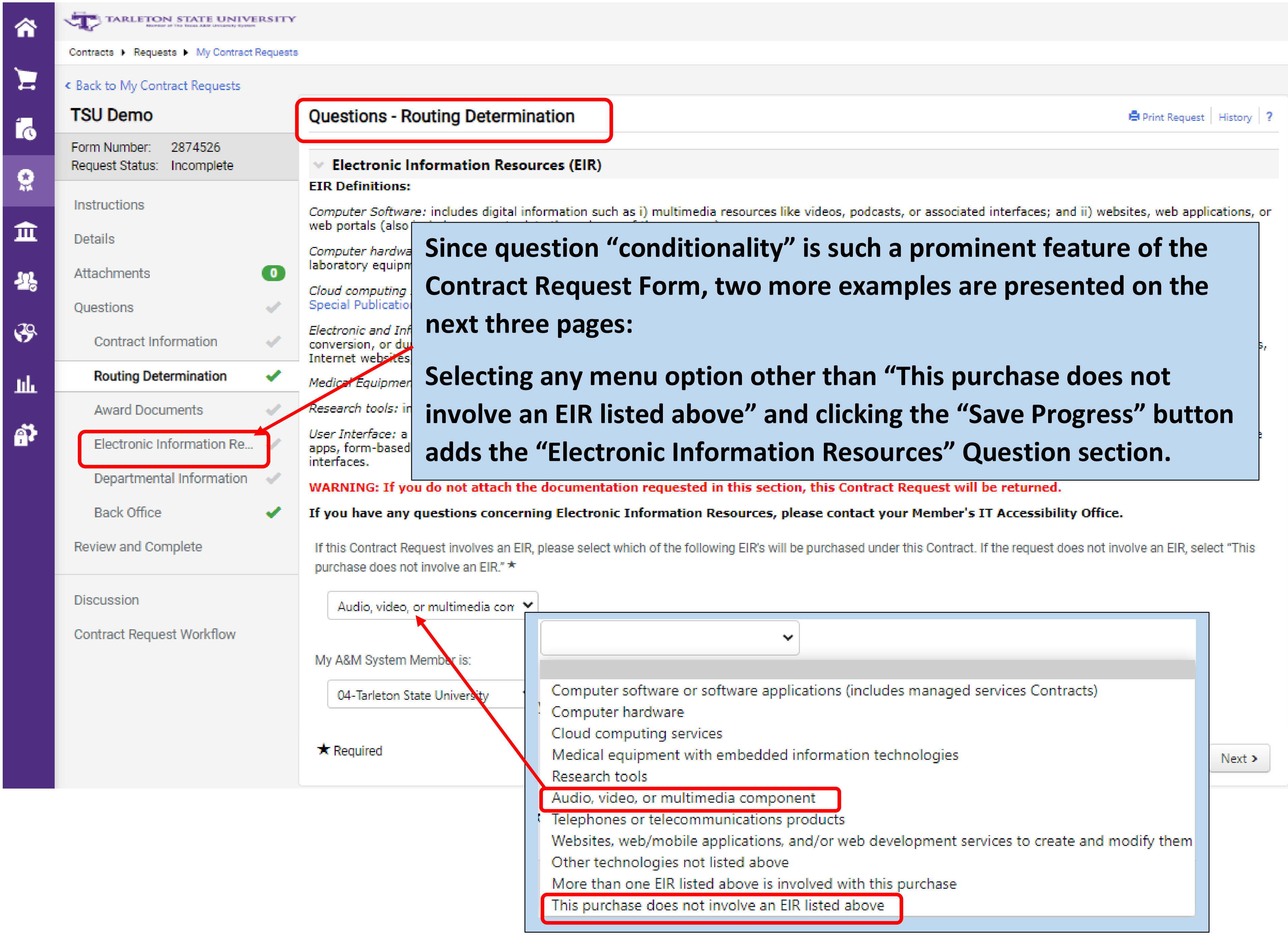


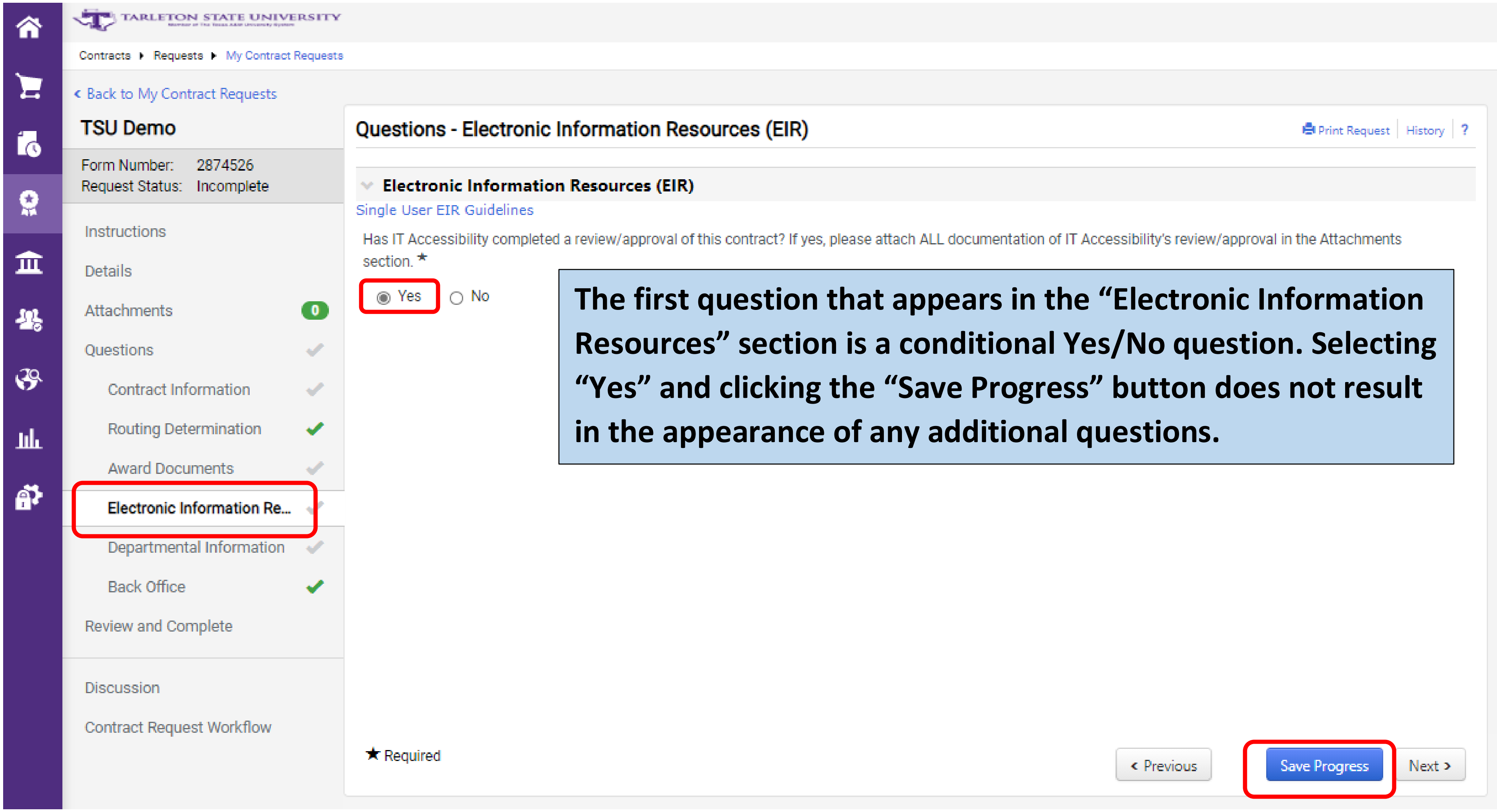


Another aspect of "conditionality" is demonstrated from the "Award Documents" screen, on which a dropdown list appears with the name of every type of Award Document identified by your Contract Administration office. These correspond with the types of "templates" used with the former system. In this system,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

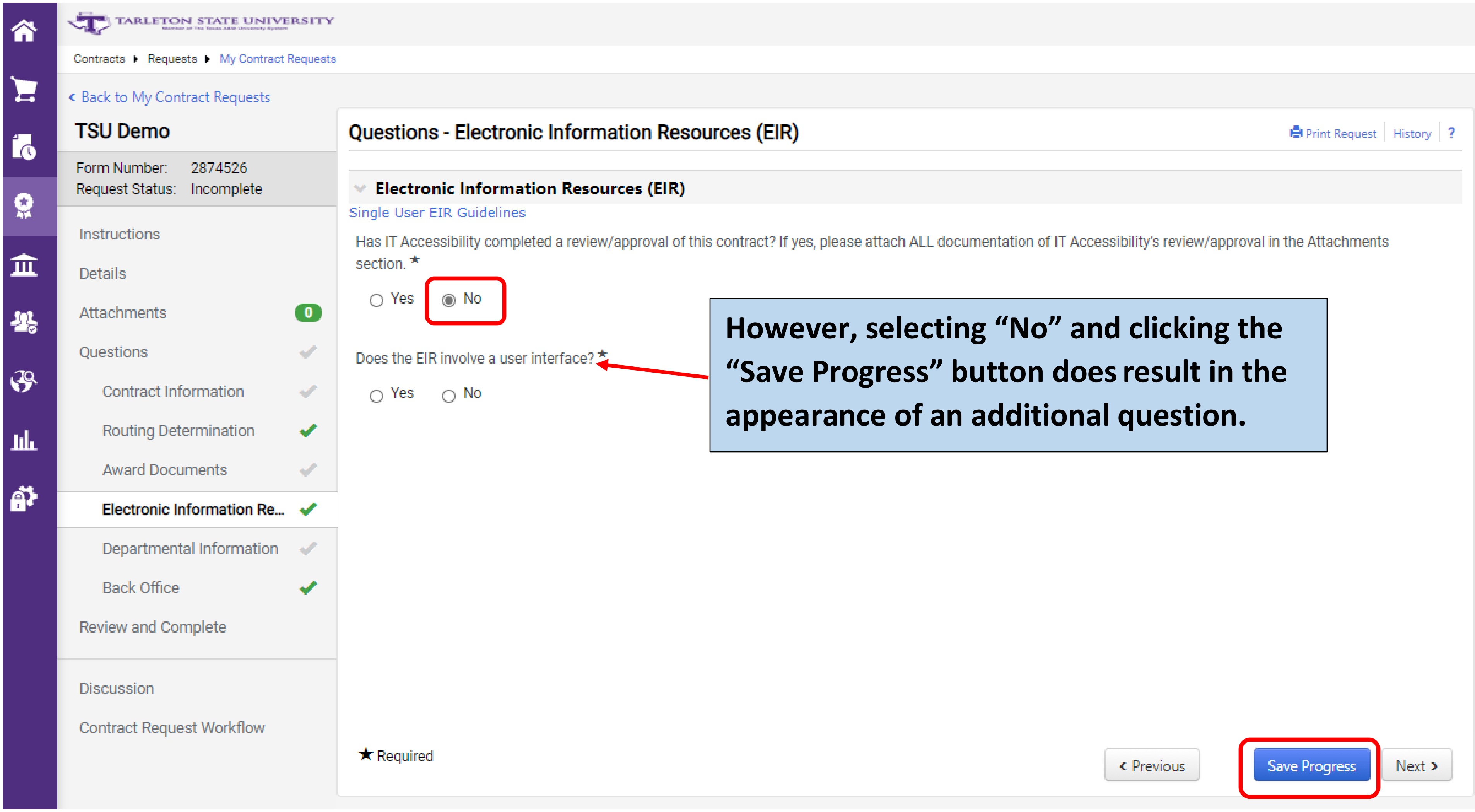


For example, if Award Document type "Inter-Agency Agreement" is selected, clicking the "Next" button results in the appearance of these questions specific to the type. *NOTE: It is possible that some questions that appear "conditionally" might also, depending on how they are answered, make additional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


TARLETON STATE UNIVERSITY
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
Electronic Information Re...
Departmental Information
Back Office
Review and Complete
Discussion
Contract Request Workflow
Questions - Routing Determination
Print Request
History
?
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
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.
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 com
My A&M System Member is:
04-Tarleton State University
★ Required
Next ›
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

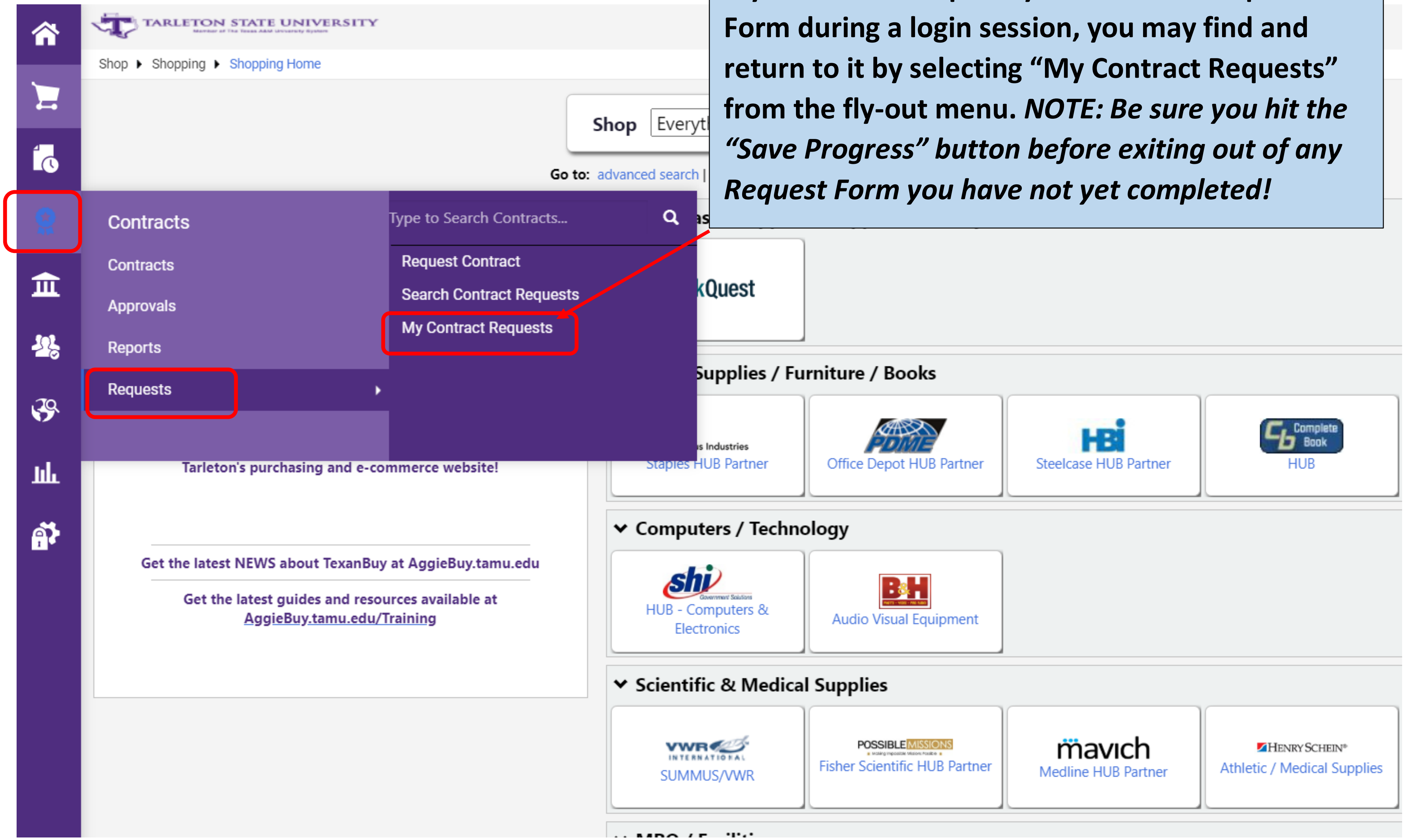


The first question that appears in the "Electronic Information Resources" section is a conditional Yes/No question. Selecting "Yes" and clicking the "Save Progress" button does not result in the appearance of any additional questions.

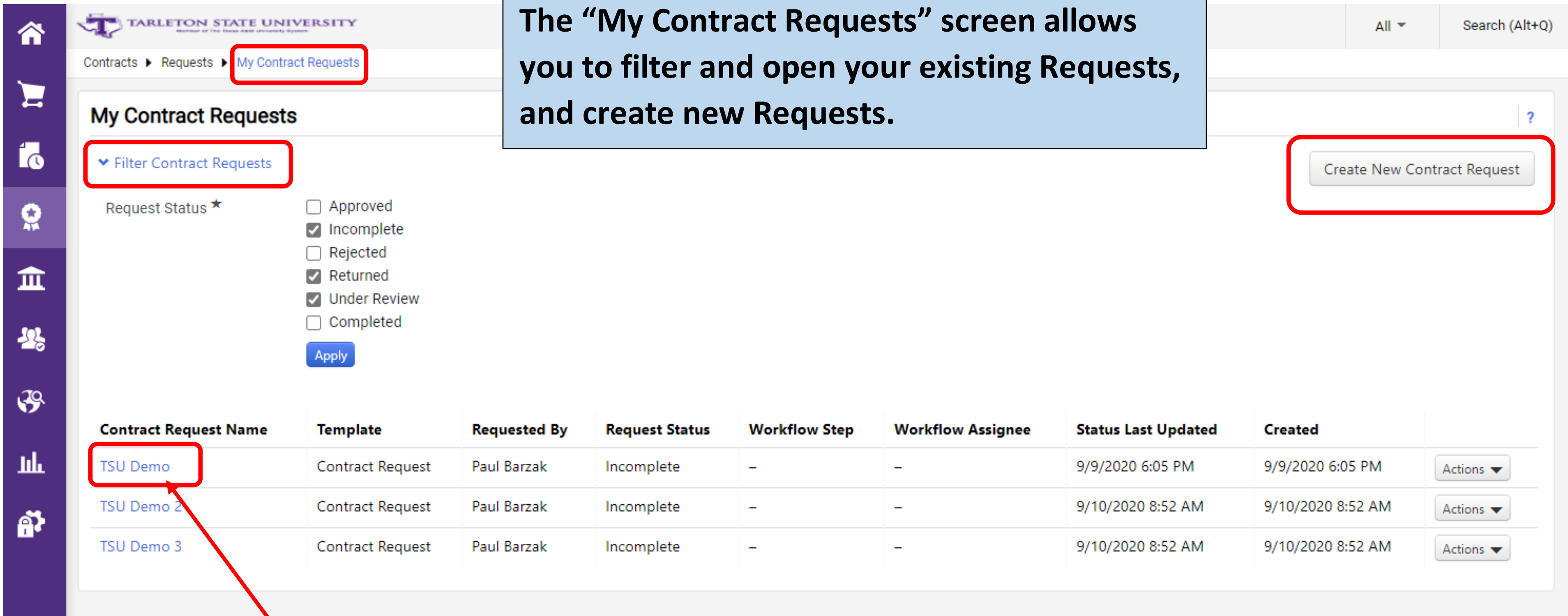


TARLETON STATE UNIVERSITY
Contracts ▸ Requests ▸ My Contract Requests
‹ Back to My Contract Requests
TSU Demo
Form Number: 2874526
Request Status: Incomplete
Instructions
Details
Attachments 0
Questions
Contract Information
Routing Determination
Award Documents
Electronic Information Re...
Departmental Information
Back Office
Review and Complete
Discussion
Contract Request Workflow
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
Does the EIR involve a user interface? ★
Yes No
However, selecting "No" and clicking the "Save Progress" button does result in the appearance of an additional question.
★ Required
‹ 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!*

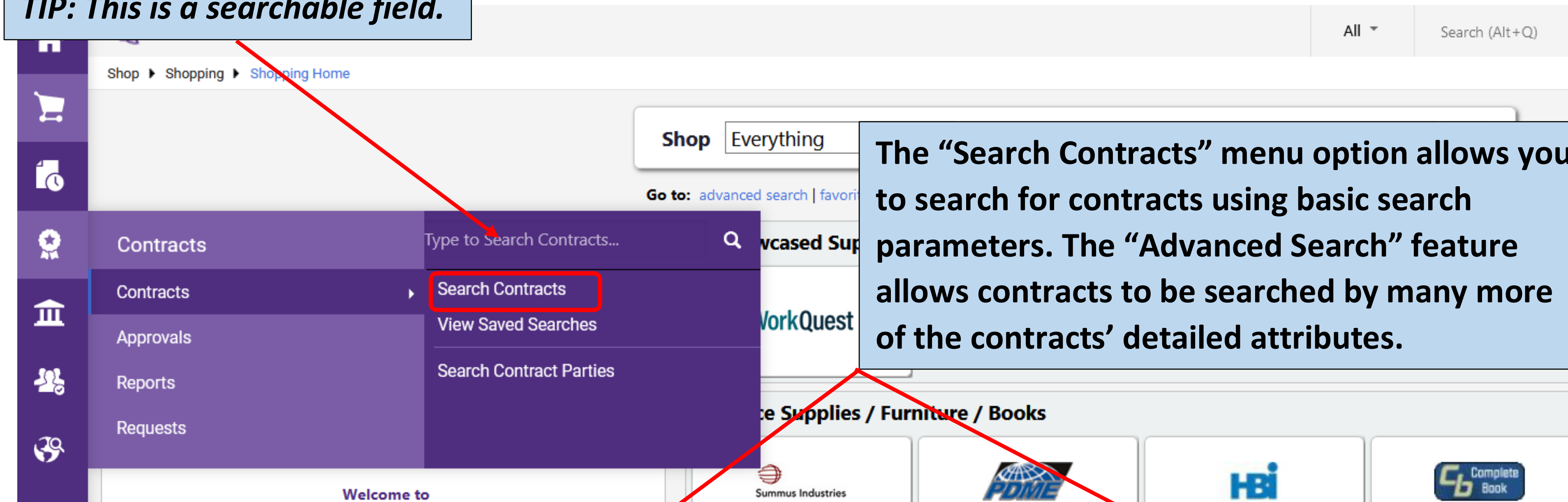


The "My Contract Requests" screen allows you to filter and open your existing Requests, and create new Requests.

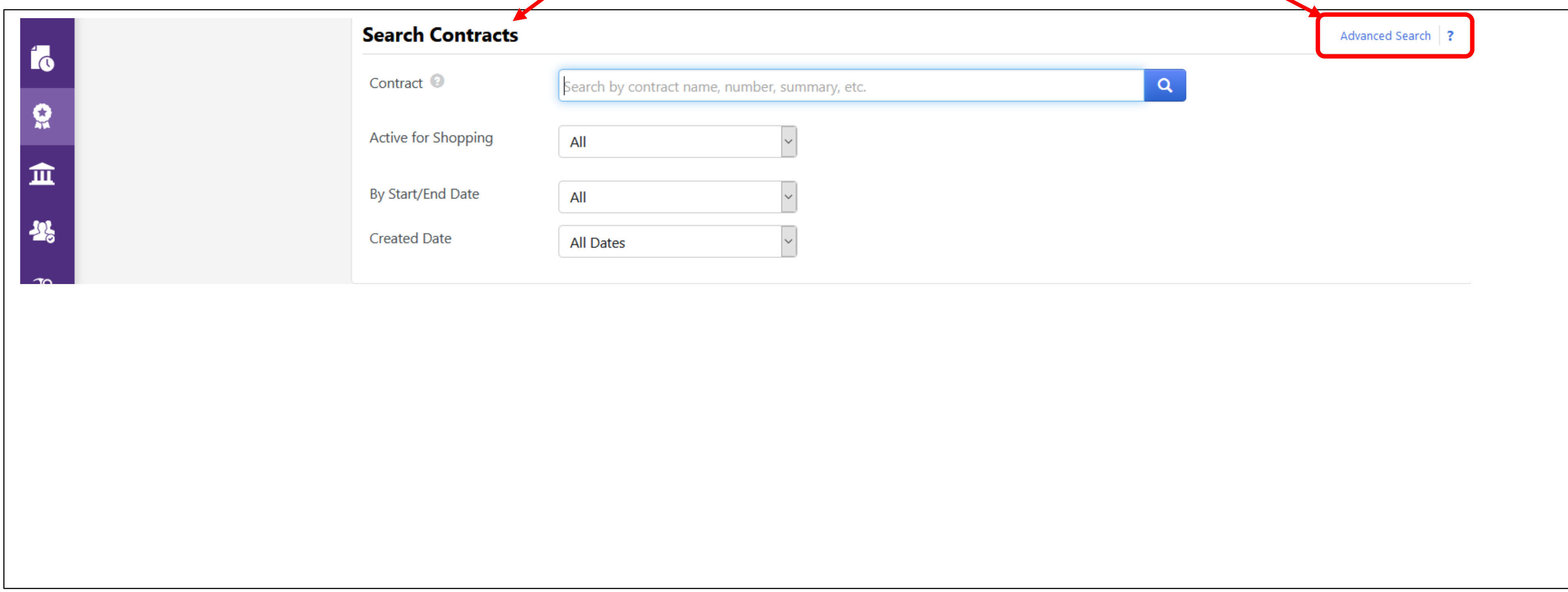


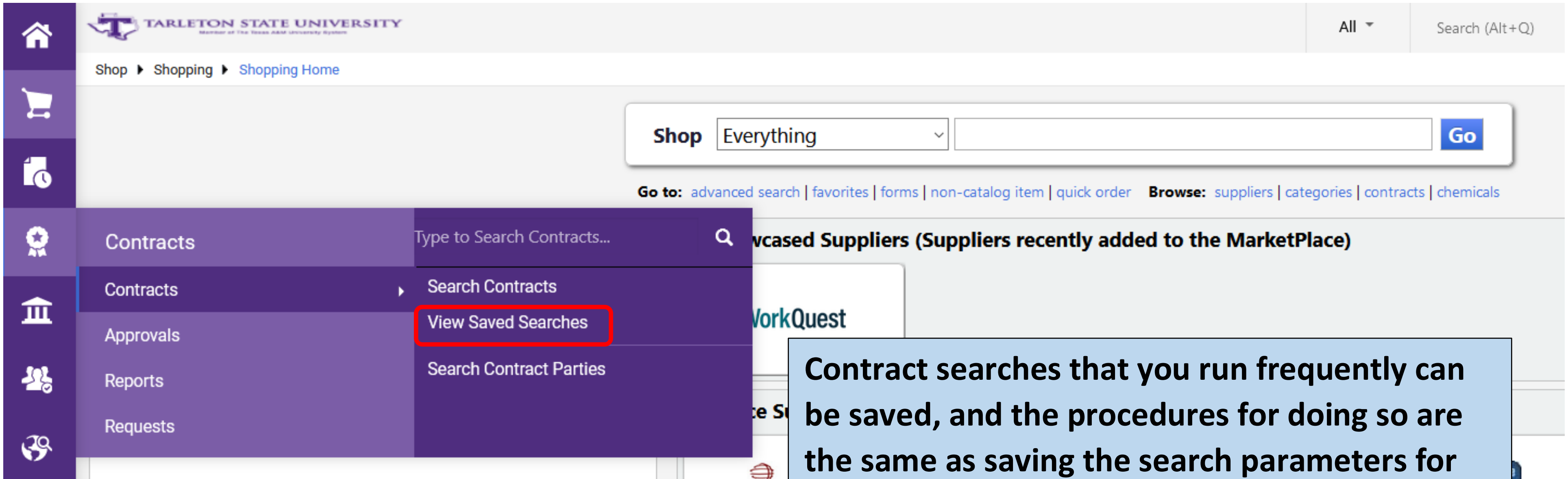
NOTE: This is the Request Form created for this Guide. You may have more than one pending Request Forms simultaneously.

TIP: This is a searchable field.

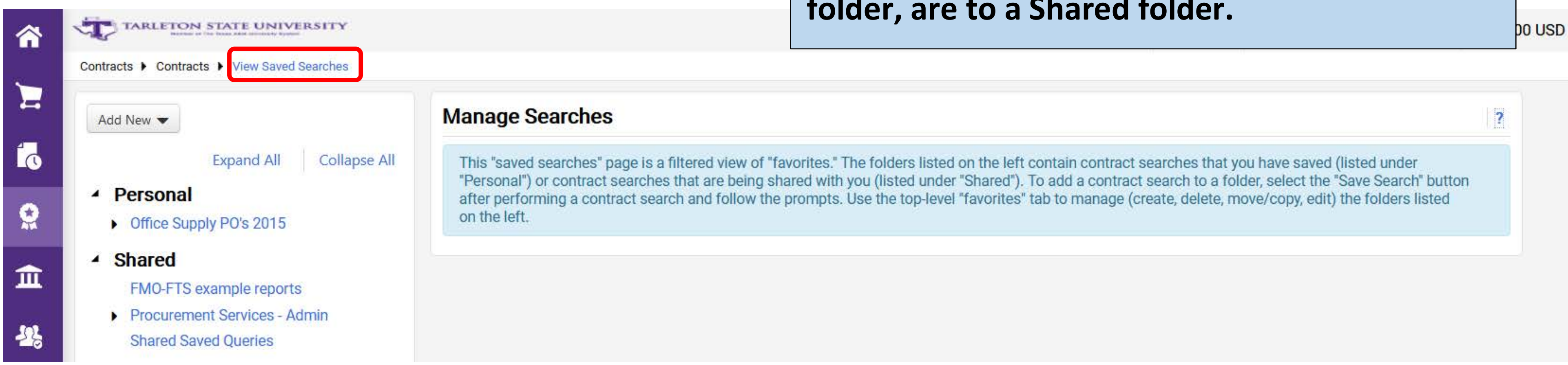


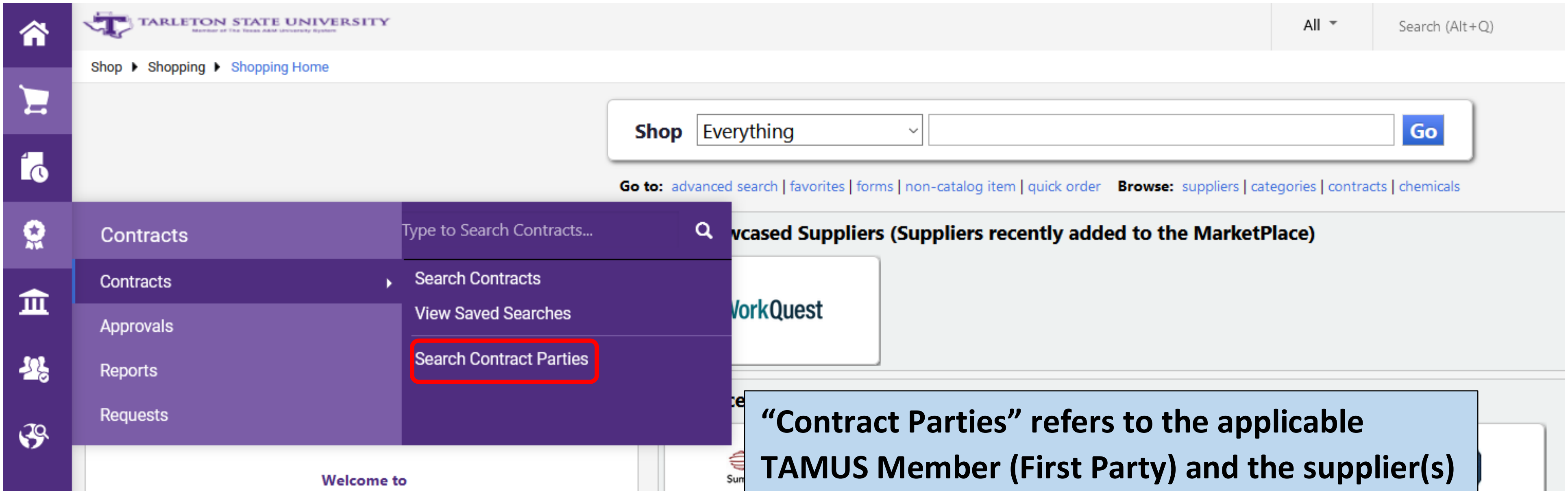
The "Search Contracts" menu option allows you to search for contracts using basic search parameters. The "Advanced Search" feature allows contracts to be searched by many more of the contracts' detailed attributes.



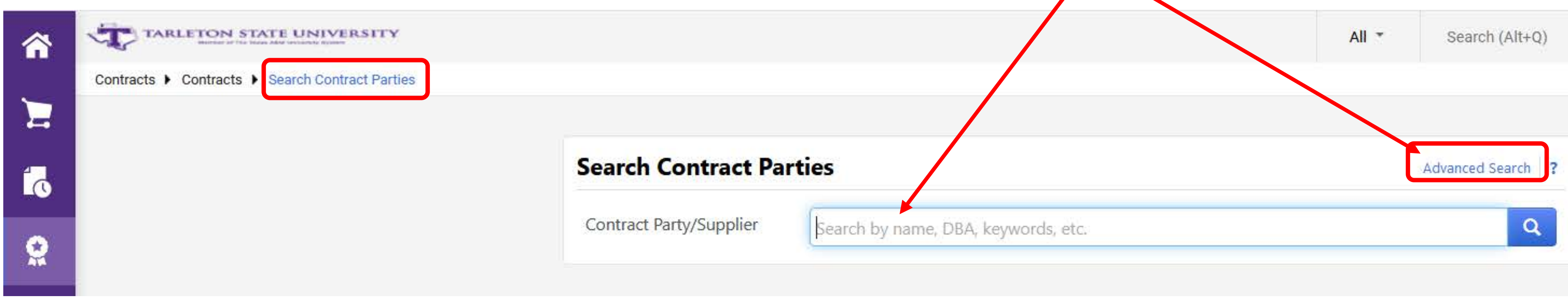


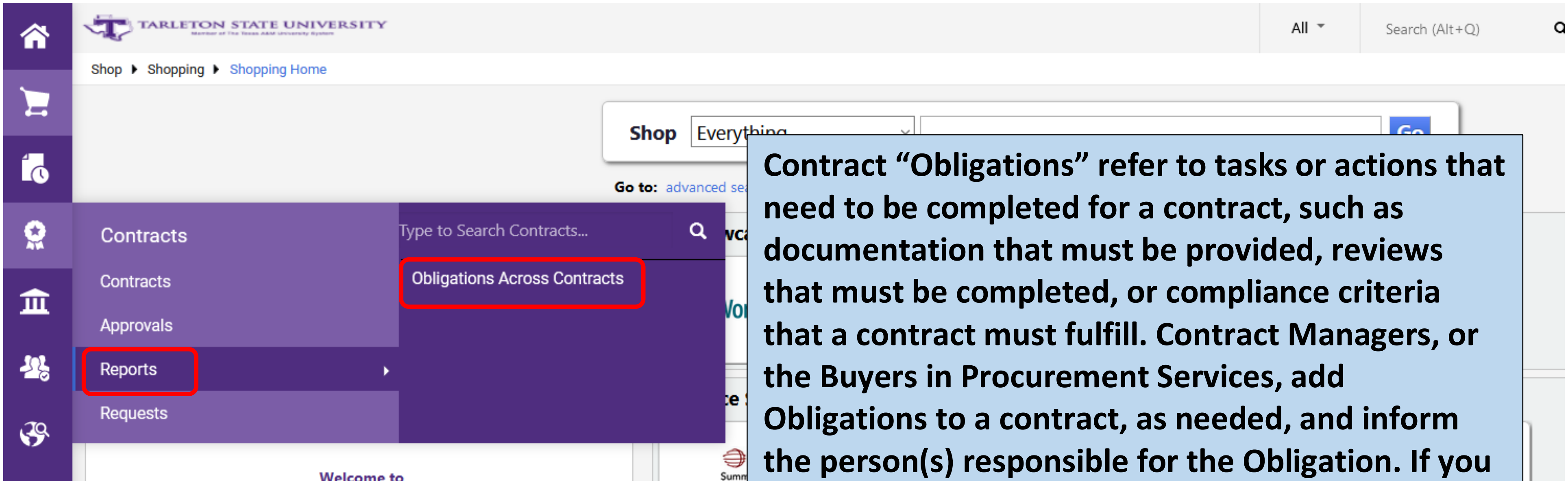
Contract searches that you run frequently can be saved, and the procedures for doing so are the same as saving the search parameters for any other document search done in the system. Searches may be saved to only your Personal folder, are to a Shared folder.



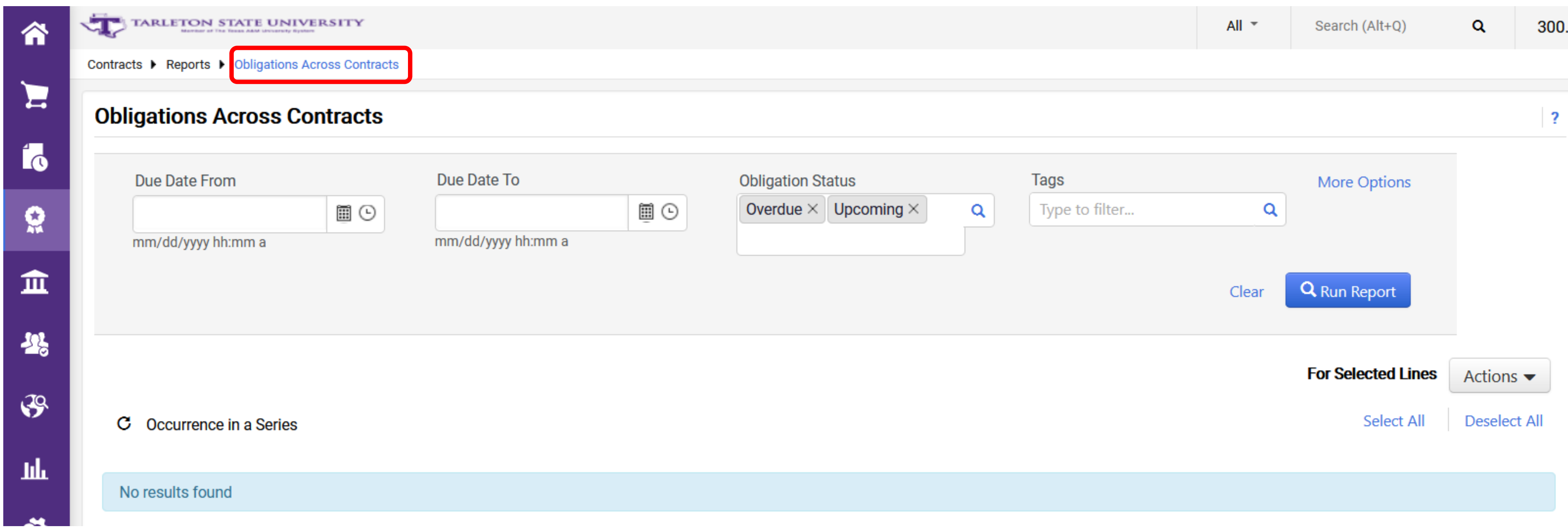


"Contract Parties" refers to the applicable TAMUS Member (First Party) and the supplier(s) to whom the contract is issued (Second Party).

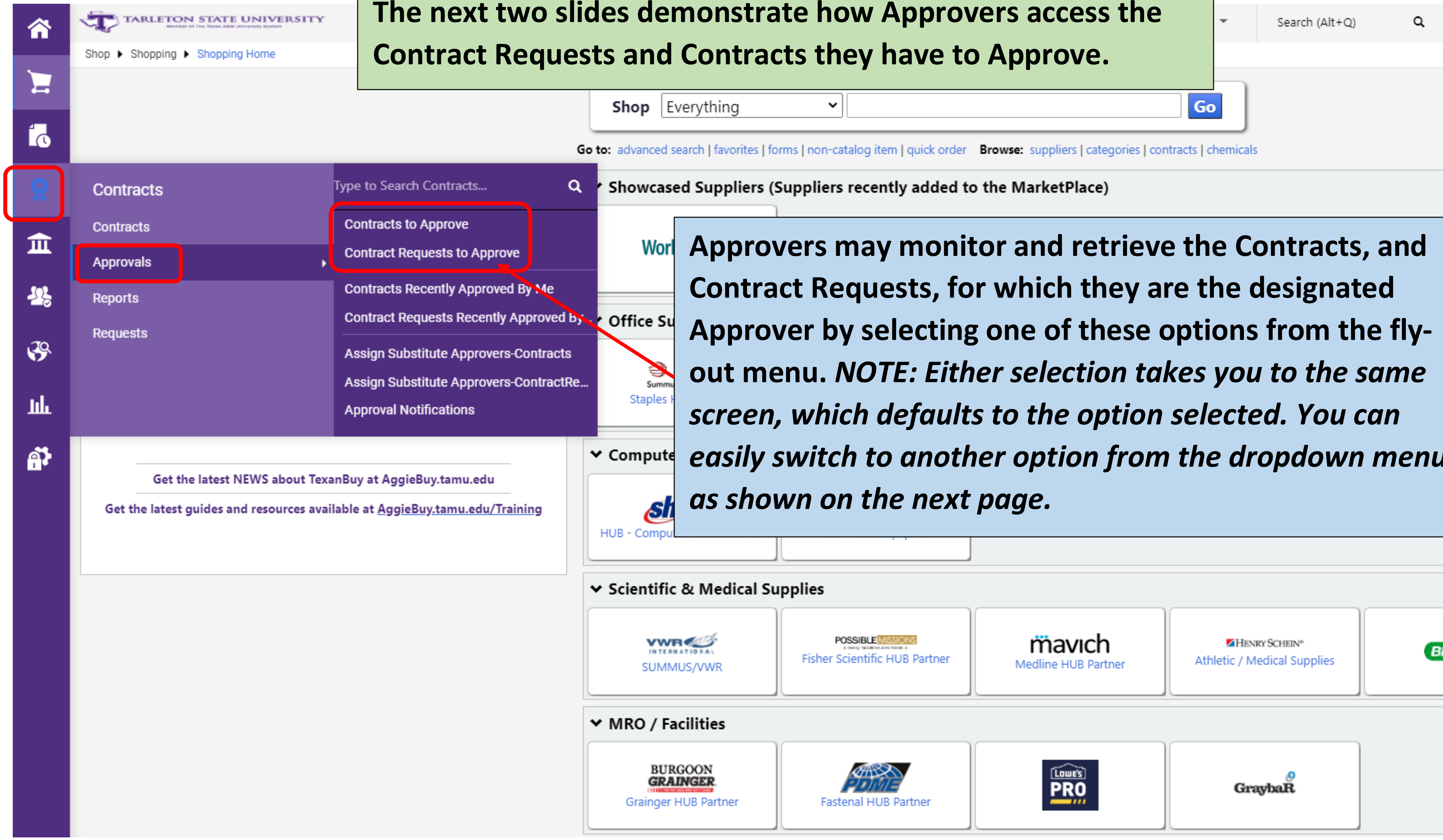




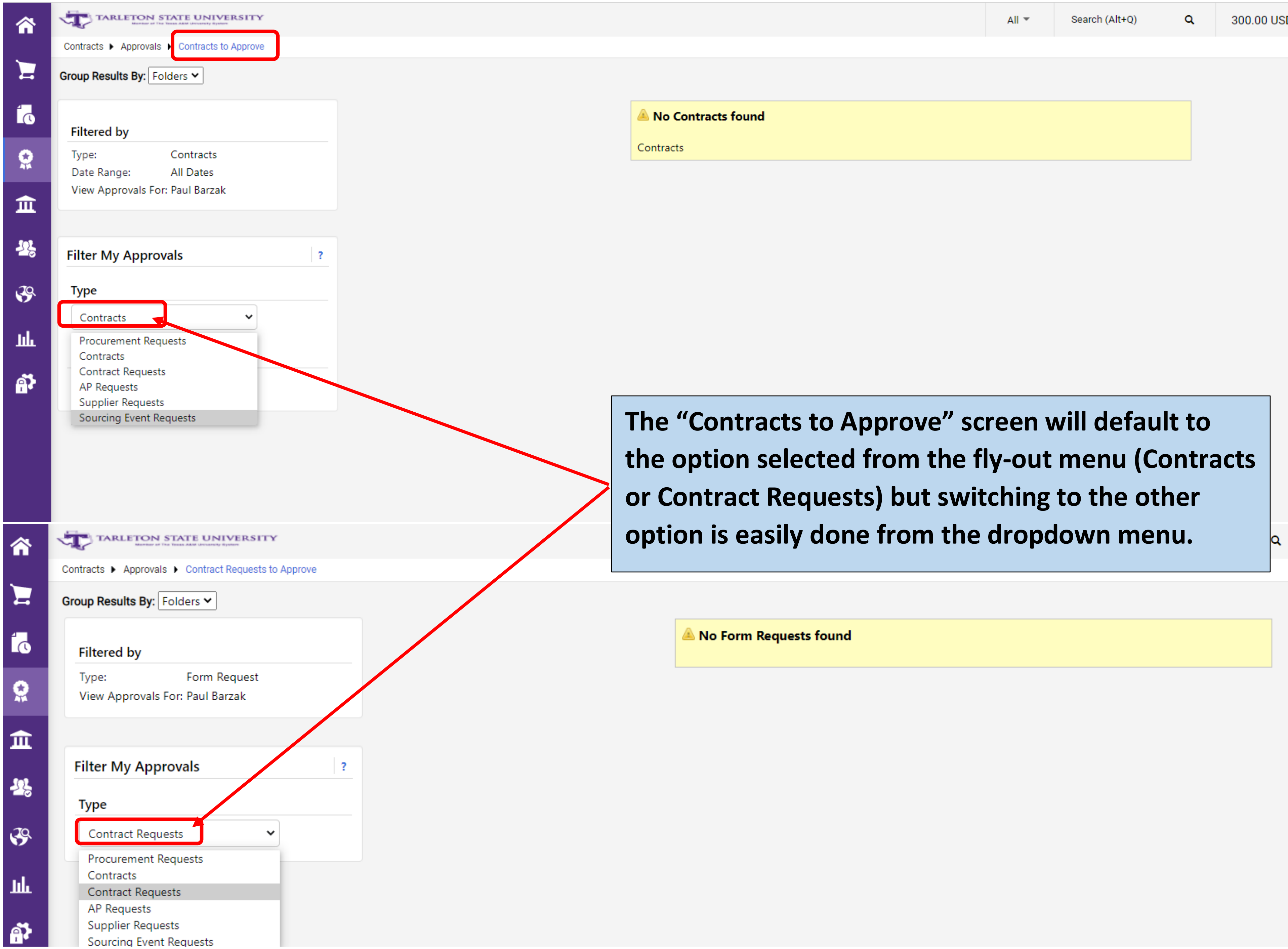
Contract “Obligations” refer to tasks or actions that need to be completed for a contract, such as documentation that must be provided, reviews that must be completed, or compliance criteria that a contract must fulfill. Contract Managers, or the Buyers in Procurement Services, add Obligations to a contract, 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.



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 "Contracts to Approve" screen will default to the option selected from the fly-out menu (Contracts or Contract Requests) but switching to the other option is easily done from the dropdown menu.