➢ If your notifications are set for you to receive an email when you have a Contract Request to approve *(see QRG for Form Request and Contract Notification Preferences if you would like to set or change your preferences)*, you will receive a notification email from "JAGGAER Support aggiebuy@sciquest.com" that will look something like this:

From: JAGGAER Support <aggiebuy@sciquest.com>
Sent: Friday, February 26, 2021 11:14 AM
To: Lynce, Loria D <lynce@tamu.edu>
Subject: Form Request Workflow for 21-02-12-Troy Reynolds is Pending Approval

TEXAS A&M UNIVERSITY

RE: Form Request Workflow for 21-02-12-Troy Reynolds is Pending Approval

Dear Loria Lynce,

21-02-12-Troy Reynolds has been submitted into Form Reqest Workflow and is awaiting approval in the Folder: 23-Dean or Unit Director-086.

Click here to view the request in your organization's site

Summary

Folder: 23-Dean or Unit Director-086
Request name: 21-02-12-Troy Reynolds

Thank You,

Texas A&M University

Support Team Contact Information:

AggieBuy@tamu.edu
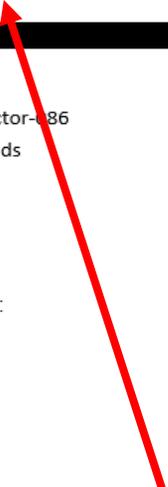
➢ Click on the "Click here to view the request in your organization's site" button. This will take you to SSO.

➢ Put your UIN and password in and submit. You will come to this screen:

➢ Select AggieBuy. Once you select AggieBuy it will automatically take you to the Contract Request that you need to review and approve. The screen will look like this:

TEXAS A&M UNIVERSITY

Contracts ▸ Requests ▸ My Contract Requests

JAGGAER revised its **Service Privacy Policy** effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy Policy.

‹ Back to Contract Requests to Approve

21-03-12-Andy H. Chen, MD, PLLC

Form Number: 3522389
Request Status: Under Review

Instructions

Details

Attachments **2**

Questions ✔

  Contract Information ✔

  Routing Determination ✔

  Award Documents ✔

  Departmental Information ✔

  Second Party Information ✔

  Back Office ✔

Discussion

Contract Request Workflow

Instructions Form Request Actions

Currently this Contract Request Form... instead of using the Contract Request...

-Please fill out all fields to ensure...

-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 ap...

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‹ Back to Contract Requests to Approve

21-03-12-Andy H. Chen, MD, PLLC

Form Number: 3522389
Request Status: Under Review

Instructions

Details

Attachments **2**

Questions ✔

  Contract Information ✔

  Routing Determination ✔

  Award Documents ✔

Attachments Form Request Actions ▾

🖨 Print Request | History | ?

Add Attachments

▾ **Request Attachments**

Attachment	Size	Actions
21-03-12-Andy Chen (Contract).pdf	711 KB	Actions ▾
21-03-12-Andy Chen (Sole Source).pdf	94 KB	Actions ▾

From this page you can review all the parts of the Contract Request.

To review the contract click on Attachments.

Attachments: provides a link to the documents which have been attached which should include the contract that is requested be reviewed by out office.

To see who has approved the contract request before you or who will approve after you click on Contract Request Workflow. It will look something like this:

TEXAS A&M UNIVERSITY

Contracts ▸ Requests ▸ Contract Requests

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‹ Back to Contract Requests to Approve

21-03-12-Andy H. Chen, MD, PLLC

Form Number: 3522389
Request Status: Under Review

Instructions
Details
Attachments **2**
Questions ✔
  Contract Information ✔
  Routing Determination ✔
  Award Documents ✔
  Departmental Information ✔
  Second Party Information ✔
  Back Office ✔

Discussion

Contract Request Workfl...

Contract Request Workflow Form Request Actions ▾

🖨 Print Request | History | ?

Submitted
3/23/2021
6:50 AM

Document Check/Catch
Active
Lindy Beasley
View approvers

Department Head
Future
View approvers

Dean or Unit Director
Future
View approvers

Ad-hoc 1
Future
View approvers

Ad-hoc 2
Future
View approvers

Contract Administration
Future
View approvers

Finish

Your step will be highlighted like it is here. If you click on the "View Approvers" link in any step you can see who will approve that step. If a step has already been approved you will see the name of the individual who approved that step.

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‹ Back to Contract Requests to Approve

21-03-12-Andy H. Chen, MD, PLLC

Form Number: 3522389
Request Status: Under Review

Instructions

Details

Attachments ② 2

Questions ✔

  Contract Information ✔

  Routing Determination ✔

  Award Documents ✔

  Departmental Information ✔

  Second Party Information ✔

  Back Office ✔

Discussion

Contract Request Workflow

Instructions Form Request Actions ▾

Add Ad-Hoc Step

Approve/Complete

Assign to Myself

Delete Ad-Hoc Step

Edit Ad-Hoc Step

Currently, this Cont[...] fully integrate with FAMIS. If you wish to encumber the funds for this Contract, please create and submit a Requisition instead of using th[...]

-Please fill out[...] est will not be returned for incomplete information.

-Attach any qu[...] entation, etc. in the Attachments section.

-Even if the pur[...] pt[...] it may[...] Administration prior to approval.

-Once you have Reviewed and Completed your R[...] [...]e lower-left corner of the screen.

-By approving this Request you are also affirming th[...]

-By approving this Request you are also approving/af[...]

🖨 Print Request │ History │ ?

After you have reviewed all that you need to review in the Contract Request you have 3 options:

1. Add AD-Hoc Step
2. Approve/Complete
3. Assign to Myself

You get to these three choices by Clicking on the blue "Form Request Actions" arrow.

Next ›

If the Contract Request looks good and you are ready to approve all you need to do is click the "Approve/Complete" link and the Contract Request will be approved and move to the next step. ***You are then finished with your approval of the Contract Request.***

➢ If you would like to include another individual in the approval workflow who is not already named in the workflow then you use the "Add Ad-Hoc Step" *(see orange circle above)*. When you click on the Add Ad-Hoc Step you get this screen:

Add Ad-Hoc Step

After Step: Document Check/Catch

- Document Check/Catch
- Department Head
- Dean or Unit Director
- Ad-hoc 1
- Ad-hoc 2
- Contract Administration

Ad-Hoc Approvers

Comments ★

1000 characters remaining

★ Required   [Save] [Close]

Add Ad-Hoc Step

After Step: Dean or Unit Director

Ad-Hoc Approvers: gibbs
- Gibbs, Shawn
- Gibbs, Valeri

Comments ★

1000 characters remaining

★ Required   [Save] [Close]

Here you choose where you want that Ad Hoc step to appear.

Here you select the individual you want in that Ad Hoc approval step.

Here you make notes to the individual you are Ad Hoc'ing into this Contract Request indicating why you are requesting their approval. Once those items are complete select SAVE and the new Ad Hoc approval step will appear. *See the steps in the green square 2 pages above.*

After you have completed this Ad Hoc step you then need to approve the Contract Request as instructed 1 page above (see yellow highlighted information). *You are then finished with your approval of the Contract Request.*

➢ If you need to make any revisions to the Contract Request then you select "Assign To Myself" *(see step circled in page above in pink)*. Once the Contract Request is assigned to you this allows you to make any necessary changes. If you make a change be sure to SAVE your change made to that particular page. You will see the blue SAVE button at the bottom of each page.

After you have made any necessary changes and saved those changes you then need to approve the Contract Request as instructed 1 page above (see yellow highlighted information). *You are then finished with your approval of the Contract Request.*