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

Enter a name for your Contract Request and "Submit".

Create Contract Request

Contract Request Name ★ | Texas A&M Demo

Select a Contract Request Form ★ | Contract Request

★ Required

Submit | **Close**

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

The AggieBuy system will automatically assign a number to your Contract Request Form.

NOTE: If your contract request includes an expense contract and the Second Party does not have an active profile in AggieBuy a W9 is required and should be attached to the contract request. A W9 is *not* required if the contract is a non-monetary contract, the contract is a revenue contract, or the Second Party already has an active profile in AggieBuy. If you do not attach a W9 when it is required, your Contract Request will be returned.

NOTE: *The Contract Request Form cannot yet be integrated with FAMIS. If you wish to ENCUMBER the funds, DO NOT use the Contract Request Form, create a requisition instead and choose to route to Procurement Services. Procurement Services will then submit your contract to Contract Administration for review.*

Click the "Next" button to proceed.

TEXAS A&M UNIVERSITY

Contracts ▸ Requests ▸ My Contract Requests

JAGGAER revised its **Service Privacy Policy** effective May 25, 2... n our Service Privacy Policy.

‹ Back to My Contract Requests

Texas A&M Demo

Form Number: 3716413
Request Status: Incomplete

Instructions

Details

Attachments   **0**

Questions   ✓

   Contract Information   ✓

   Routing Determination   ✓

   Departmental Information   ✓

   Back Office   ✓

Review and Complete

Discussion

Contract Request Workflow

Details   Request | History | ?

Contract Request Name ★   [Texas A&M Demo]

Template   Contract Request

Contract Type   –

Description   –

‹ Previous   Save Progress   Next ›

> 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 individual section names on the menu or the "Previous" button.

NOTE: *Clicking the "Next" button automatically saves any changes you make on the current 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. Anytime you need to leave the Request Form without completing it be sure to **SAVE PROGRESS**!*

4

Depending on the type and scope of the Contract you are requesting be reviewed, you may be advised and/or required in a subsequent screen to add an attachment to the Request Form. Attachments may include: a W9, vendor quote, vendor contracts, documentation, etc. 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 Department of Contract Administration office.

The "Questions" section is the heart of the Contract Request Form. It may be navigated by either the Menu, the blue links found on the Questions screen, or the "Next" button.

All "checks" will turn green once the Contract Request is complete.

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 My Contract Requests

Texas A&M Demo

Form Number: 3716413
Request Status: Incomplete

Instructions

Details

Attachments   ⓿

Questions   ✓

Contract Information ✓

Routing Determination

Departmental Information ✓

Back Office   ✓

Review and Complete

Discussion

Contract Request Workflow

Questions - Contract Information   🖶 Print Request | History | ?

⌄ **On This Page**

   Monetary Information (8)
   Contract Summary (8)

⌄ **Monetary Information**

Is this a Monetary Contract? *

○ Yes   ○ No

> Many of the questions in the Contract Request are "conditional". This means that depending on how you answer a question, additional questions and/or sections may appear.

⌄ **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

> Here is an example of an instruction to add an Attachment as mentioned on p. 5.

Is this a New or Existing Contract?

[⌄]

Start Date * ⓘ

[   ] 📅
mm/dd/yyyy
☐ Update Start Date Upon Execution ⓘ

End Date *

○ Expires On   ○ No Expiration

> Required fields are designated by a star * icon.

Has the Contractor/Supplier furnished a Contract document *

○ Yes   ○ No

★ Required   < Previous   Save Progress   Next >

First half of Contract Information screen – Different Scenarios:

Scenario 1: Monetary Expense contract encumbering funds

Answer is YES here because the contract is valued at over $10K. **NOTE:** When you answer YES to this question there will be additional questions on the next screen which require you to identify if the purchase is exempt or a sole source purchase. If the purchase is within your delegated spend you will not be required to answer those questions on the next screen.

NOTE: If you submit a requisition and attach a contract be sure to select **"ROUTE TO PROCUREMENT SERVICES"** – *especially if your contract is valued at under $10K*. Procurement WILL submit the contract to Contract Administration for review/approval. You **DO NOT** need to submit the contract through a Contract Request Form.

If you stop at this point and go do a requisition instead probably best to delete your contract request.

Scenario 2: Monetary Expense contract NOT encumbering funds

Scenario 3: Monetary Revenue contract

TEXAS A&M UNIVERSITY

Contracts ▸ Requests ▸ My Contract Requests

‹ Back to My Contract Requests

Texas A&M Demo

Form Number: 3716413
Request Status: Incomplete

Instructions

Details

Attachments **0**

Questions ✓

Contract Information ✓

Routing Determination ✓

Departmental Information ✓

Back Office ✓

Review and Complete

Questions - Contract Information

🖶 Print Request | History | ?

▾ **On This Page**

Monetary Information (8)

Contract Summary (8)

▾ **Monetary Information**

Is this a Monetary Contract? *
● Yes   ○ No

Estimated Total Contract Value *
[$10,000 - $24,999 ▾]

Is this a Revenue Contract? *
● Yes   ○ No

> Only 3 questions to answer in this section when completing a monetary revenue contract request.

Scenario 4: Non-monetary contract

Texas A&M Demo

Form Number: 3716413
Request Status: Incomplete

Instructions

Details

Attachments **0**

Questions ✓

Contract Information ✓

Routing Determination ✓

Departmental Information ✓

Back Office ✓

Review and Complete

Questions - Contract Information

🖶 Print F

▾ **On This Page**

Monetary Information (8)

Contract Summary (8)

▾ **Monetary Information**

Is this a Monetary Contract? *
○ Yes   ● No

> Only 1 question to answer in this section when completing a non-monetary contract request.

▾ **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 th 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 t Attach the completed template to this Contract Request in the "Attachments" section.

10

Second half of Contract Information screen – Different Scenarios:

Scenario 1: NEW contract with vendor supplied document

When you answer YES to this question the Second Party Information screen will appear in the menu. If you do not know the name of the Second Party and answer NO to this question the Second Party Information screen will not appear.

NOTE: If you are attaching a contract for review *(which was received from the Second Party)* to the contract request or are requesting a template be created in order for you to contract with a Second Party, you should know the name of your Second Party.

NOTE:
- If it is a 1-day contract your start date and end date will be the same.
- If you will be making a pre-payment of any kind your start date should be the day you are required to make the payment.
- Be sure to include the expiration date of the contract.

If the contract includes renewal information you may add that information here.
Otherwise you can leave these questions blank since they are not required.

Scenario 2: NEW contract with Member award document

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 *

> DEMO

1996 characters remaining

Is this a New or Existing Contract?

> New

Do you know the name of the Second Party (i.e. Vendor/Contractor/Suggested Source) to the contract? *

● Yes ○ No

Start Date * ⓘ

> 05/01/2021
mm/dd/yyyy

☑ Update Start Date Upon Execution ⓘ

End Date * ⓘ

● Expires On ○ No Expiration

> 04/30/2022
mm/dd/yyyy

Auto-Renew

○ Yes ● No

Renewal Term

> 1 ▲▼ Years

Renewals Remaining

> 4 ▲▼

Has the Contractor/Supplier furnished a Contract document? *

○ Yes ● No

Contract Award Document - A&M System Member

By choosing an A&M System Member Award Document here, it is no longer necessary for you to draft a contract by using one of the online templates. By completing this section, it allows Contract Managers to draft the correct award document on your behalf.

Select Award Document: *

> Presentation-Speaker Agreement ✕ 🔍

★ Required

‹ Previous   Save Progress   Next ›

When you select NO indicating that the Contractor/Supplier has not furnished a Contract document, you will have the opportunity to choose a Texas A&M Award Document.

When you click on the magnifying class under "Select Award Document" a search box will appear that allows you to search and pick the appropriate award document. Depending on which award document you pick additional questions will show up on a separate screen which provide for the "fill in the blank" in the award document.

If you need a "go by" for context the award documents can also be found on our website (contracts.tamu.edu/resources). We will have links posted to each of the documents when selected within the Contract Request soon.

Select Award Document:

> 🔍

‹ › Page 1 of 6   1-10 of 51 Results   10 Per Page ▼

Name

Athletic Contest Agreement	Select
CVMBS-Stepstone Renewal Form	Select
CVMBS-Stepstone Software Subscription Agreement	Select
CVMBS-Subscription & License Agreement	Select
CVMBS-Subscription Renewal	Select
CityCentre Three Facility	Select
Confidential Nondisclosure Agreement	Select
Construction Contract	Select
Consulting or Professional Services	Select
Distribution Agreement	Select

‹ › Page 1 of 6   1-10 of 51 Results   10 Per Page ▼

Selected Value

> General Use Agreement

Close

12

Scenario 3: Amendment to Contract

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 *

DEMO

1996 characters remaining

NOTE: When "Existing Contract" is selected the Second Party Information screen will not appear. Because the contract is an amendment/renewal to an existing contract the Second Party information will already be in the system.

Is this a New or Existing Contract?

Existing

Contract Number *

2021-38150   OR   C2021-2905

The Contract Number will be the number of the contract that this Amendment/Renewal is amending/renewing. This may be a contract number from our old contract database *(i.e. 2021-38150)* or from the new Contracts+ system *(i.e. C2021-2905)*

Amendment or Renewal/Extension *

Amend/Modify

| Amend/Modify |
| Renew/Extend |

St

05/01/2021

mm/dd/yyyy

☑ Update Start Date Upon Execution

End Date *

◉ Expires On   ○ No Expiration

04/30/2022

mm/dd/yyyy

13

Routing Determination screen – Exempt Categories Different Scenarios:

Scenario 1: Exempt Purchase

‹ Back to My Contract Requests

Texas A&M Demo

Form Number: 3716413
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 | ?

∨ **On This Page**

   Exempt Categories (7)

   Electronic Information Resources (EIR) (1)

∨ **Exempt Categories**

Texas A&M System Policies and Procedures allow certain purchases with a dollar value exceeding the A&M System Member's delegated spend limit to be exempted from competitive bidding requirements. Each A&M System Member determines their own delegated spend limits and exemption categories.

Do you believe that this Contract is an Exempt Purchase as defined by A&M System Policies and Regulations? *

(•) Yes   ( ) No

My A&M System Member is: *

[02-Texas A&M University   ∨]

Select Texas A&M University's Exempt Service or Product category applicable to this Contract. * ⓘ

[∨]

| Classified Advertising |
| Conference Expenses - related to on-site services |
| Direct Publications - available only from the publisher |
| Freight |
| Goods/Services provided by other State of Texas Agencies, TAMUS Members, or other Local Governments |
| Goods and Services provided by the Texas Department of Criminal Justice |
| Goods and Services provided by WorkQuest (formerly TIBH) |
| Internal Repairs |
| **Lecturers/Guest Speakers/Entertainers (one-time basis only)** |
| Legislative Information Services - bill analysis services |
| Library Materials - specifically for an A&M Member Library |
| Membership Fees and Dues |
| Moving Expenses - Employee, institutional funds only |
| Payments to Accrediting Organizations |
| Purchases from Federal Agencies |
| Purchases from Institutions of Higher Education |
| Purchases made directly through the AggieBuy MarketPlace |
| Registration Fees and associated books and materials |
| Rental of Exhibit Space (booths for display purposes) |

> If your contract is an exempt purchase you choose YES, select Texas A&M University as you're A&M System Member, and then select the appropriate exempt category.

> **NOTE:** If your purchase does not fall into one of these exempt categories then you will need to choose the next scenario – Sole Source Purchase or contact Procurement Services about bidding out the purchase.

14

Scenario 2: Sole Source Purchase

REAL ESTATE:

If your contract is a Real Estate purchase and the contract has been prepared and approved by the A&M System Real Estate Office you will select NO to exempt purchase, YES to Sole Source contract, and YES indicating that the A&M System Real Estate Office has prepared and approved the contract. No additional questions/answers are needed.

If the contract is not an exempt purchase and not a Real Estate purchase, then you will need to choose NO to the real estate question and proceed as provided on page 16 below.

OTHER SOLE SOURCE PURCHASES:

For all other Sole Source Purchases, you will select NO to exempt purchase, YES to Sole Source contract, and NO to the real estate question. The Sole Source Questions will then appear. The answers to these questions will later be reviewed by Procurement Services to determine if this purchase qualifies as a sole source purchase.

NOTE: Need to complete these questions as completely and accurately as possible. You must answer all questions with a "*". Those that do not have an "*" do not require an answer in order to proceed. Should you have questions concerning these Sole Source Questions please reach out to Texas A&M's Procurement Services.

REMEMBER: **The Exempt Purchase and Sole Source questions ONLY appear when the contract is an *expense* contract that exceeds the Member's delegated spend (i.e. over $10K).** These questions will not appear when a contract is 1) within the department's delegated spend; 2) a revenue contract; 3) a non-monetary contract.

Routing Determination screen – Electronic Information Resources (EIR):

NOTE: Instructions and/or definitions are provided, as needed, at the beginning of different sections throughout the Contract Request. These instructions provide guidance in determining if your purchase involves and EIR.

NOTE: It is important to remember that if there is information that should be attached to the request and you do not attach it, the Contract Request will be returned to you.

Select "Next" to proceed to the next screen

If your purchase involves an EIR as defined in the definitions, you will need to identify that EIR here.

If your purchase does not involve an EIR then select "This purchase does not involve an EIR listed above."

NOTE: when you indicate that your purchase does involve an EIR, the "Electronic Information Resources" screen will appear in the menu. This screen will ask additional questions related to the EIR.

17

Award Documents screen:

Answering these questions will allow Contract Administration to draft the award document you have requested. If you need to see the document for context of the questions being asked you can find the documents on our website – contracts.tamu.edu/resources.

We will soon have links posted to each of the award documents. *Those documents should be used for reference purposes only and should NOT be attached to the Contract Request.*

NOTE: This screen only appears if you have answered "NO" to the question "Has the Contractor/Supplier furnished a Contract document?" and chosen a Texas A&M Contract Award Document as your contract. These questions are based upon the award document you choose.

Electronic Information Resources screen:

Back to My Contract Requests

Texas A&M Demo

Form Number: 3716413
Request Status: Incomplete

Instructions
Details
Attachments **0**
Questions ✓
  Contract Information ✓
  Routing Determination ✓
  Award Documents ✓
  Electronic Information Re... ✓
  Departmental Information ✓
  Second Party Information ✓
  Back Office ✓
Review and Complete

Discussion
Contract Request Workflow

Questions - Electronic Information Resources (EIR)

Print Request | History | ?

On This Page
Select your A&M System Member ID (1)
Electronic Information Resources (EIR) (7)
Additional EIR info (2)
Additional EIR info - Cloud Services (2)

Select your A&M System Member ID
My A&M System Member is: *
02-Texas A&M University

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

Will the EIR be used by only one individual? *
○ Yes ● No

Please indicate how the EIR will be used: *
Utilized for purposes other than

Please indicate which of the following conditions apply, if any, with respect to the EIR: *
Neither condition applies

Additional EIR info
If you have any questions concerning the COVID-19 EIR Accessibility Exception Register or the Supplemental EIR Exception Register, please contact Texas A&M's IT Accessibility Office at 979.862.6834 or itaccessibility@tamu.edu

Additional EIR info - Cloud Services
Approved Cloud Services Providers List

If the vendor of the cloud computing service has been approved by the CIO, please enter the vendor's reference number found on the list of Approved Cloud Service Providers (linked above). If the vendor has not been approved by the CIO, please enter "not required" and attach documentation from the IT Risk Assessment office that confirms this purchase does not require approval by the CIO.

WARNING: If your response to a question in this section requires documentation to be attached but the documentation is not attached, this Contract Request will be returned.

If you have any questions about the Approved Cloud Services Providers List or obtaining documentation from the IT Risk Assessment Office, please contact Texas A&M's IT Risk Assessment Office at ra@tamu.edu

★ Required

< Previous | Save Progress | Next >

There are many conditional questions on this screen. Depending how you answer one question may or may not result in additional questions.

Clicking this link will take you to the Texas A&M IT Accessibility page for additional information.

NOTE: This screen only appears if you previously indicated that your contract involves an EIR and have designated which EIR on the Routing Determination screen. If you answer "This purchase does not involve an EIR listed above" on the Routing Determination screen, this Electronic Information Resources screen will not appear.

NOTE: If you know your contract involves an EIR it is more efficient to work with the IT Accessibility office to have your EIR approved prior to submitting the contract to our office for review. If you have not had your EIR approved and the Contract Request routes to the IT Accessibility office, it could cause delays.

Should you have any questions related to how to answer these questions please contact the IT Accessibility office at 979-862-6834 or itaccessibility@tamu.edu

19

Departmental Information screen:

‹ Back to My Contract Requests

Texas A&M Demo

Form Number: 3716413
Request Status: Incomplete

Instructions
Details
Attachments ⓪
Questions ✓
   Contract Information ✓
   Routing Determination ✓
   Award Documents ✓
   Electronic Information Re... ✓
   Departmental Information ▾
   Second Party Information ✓
   Back Office ✓
Review and Complete

Discussion
Contract Request Workflow

Questions - Departmental Information

🖶 Print Request   History   ?

▾ **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 or unit name **beginning with the applicable A&M System Member ID prefixed with "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 ★

[02-Texas A&M University ▾]

Department Name ★

[Admin - Dean ✕ 🔍]

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

[02-CLED]

Primary Contact's Name: ★

[Jill M. Hobbs]

Primary Contact's Address: ★

[4222 TAMU]

Primary Contact's City/State/Zip: ★

[College Station, TX 77843-4222]

Primary Contact's Email Address: ★

[jillhobbs@tamu.edu]

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

[979-845-1111]

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

[979-845-6129]

★ Required

[‹ Previous]   [Save Progress]   [Next ›]

Be sure to read and follow these instructions when picking your department in the "Department Name" section below.

Work Groups ✕

[🔍]

○ AgriLife - Extension
○ AgriLife - Research
▸ ○ CLM - Health Science Center
▸ ○ CLM - TAMU-Galveston
▸ ○ CLM - Tarleton State University
○ CLM - TEEX
▾ ○ CLM - Texas A&M University
  ▸ ○ Academic Affairs - Executive VP & Provost
  ▸ ○ Administration- Other
  ▸ ○ Athletic Department
  ▸ ○ Bush School of Government & Public Service
  ▸ ○ College of Ag & Life Sciences
  ▸ ○ College of Architecture
  ▾ ○ College of Education & Human Development
    ● Admin - Dean
    ○ College of Ed & Human Development Research
    ○ Ctr for Research & Development In Dual
    ○ Educational Adm & Human Resource Development
    ○ Educational Psychology
    ○ Health & Kinesiology
    ○ Teaching, Learning, & Culture
    ○ Texas Center for the Advancement Literacy/Learning

This should be the person who knows the most about the contract. If Contract Administration has questions concerning the contract this is the person who will be contacted.

When you select the magnifying glass under "Department Name" this "Work Group" box pops out. The steps to choosing the Dean's Office under College of Education & Human Development are as follows:

- Click the "triangle" next to CLM-Texas A&M to open the options

- Click the "triangle" next to "College of Education & Human Development" to open further options

- Mark the appropriate department.

Second Party Information screen:

Be sure to read this instruction!

NOTE: This Second Party Information screen will not appear if you select that your contract is an Existing Contract on the Contract Information screen. Because the contract is an amendment/renewal to an existing contract the Second Party information will already be in the system.

< Back to My Contract Requests

Texas A&M Demo

Form Number: 3716413
Request Status: Incomplete

Instructions
Details
Attachments   0
Questions   ✓
    Contract Information   ✓
    Routing Determination   ✓
    Award Documents   ✓
    Electronic Information Re...   ✓
    Departmental Information   ✓
    Second Party Information
    Back Office   ✓
Review and Complete

Discussion
Contract Request Workflow

Questions - Second Party Information

Print Request | History | ?

Second Party (Contractor/Supplier) Name and Contact Info

The **Second Party** is the individual or organization with whom the First Party (i.e., the A&M System Member) is entering into the Contract.

A W9 IS REQUIRED to be attached to the Contract Request if the contract is an expense contract of any kind, **AND** the Second Party (Contractor/Supplier) **does not** already have an active profile in AggieBuy. A W9 **is not required** if the contract is *1)* a non-monetary contract (no money involved), *2)* a revenue contract (money being paid to the A&M System Member), or *3)* the Second Party already has an active profile in AggieBuy . *If a W9 is required but is not attached to the Contract Request, the Contract Request will be returned to the requestor and not processed until the W9 is provided.*

Second Party Name *

Joe Smith, Ph.D.

If this contract is an expense contract, please enter the last four digits of the Second Party's Federal Tax ID Number or SSN. Otherwise, enter "none". *

0063
ⓘ Field Validation

The last four digits of the Second Party's Federal Tax ID Number or SSN **MUST** be entered for ALL EXPENSE contracts wherein the Second Party *does not have* an active profile in AggieBuy. If you submit an expense contract wherein the Second party does not have an active profile in AggieBuy and you do not provide the last four digits, or you enter "none" or "otherwise", the Contract Request will be returned to you and not processed until the correct information is received.

Second Party Contact's Name *

Joe Smith, Ph.D.

Second Party Contact's Address *

123 Smith Way

1987 characters remaining
ⓘ Field Validation

Second Party Contact's City/State/ZIP *

Houston, TX 77002

Second Party Contact's Email Address *

jsmith@smithway.com

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

713-555-2626

Second Party Contact's Fax Number (xxx-yyy-zzzz)

713-555-2727

NOTE: Fax number is not required. Only provide if you have it.

Will more than one Contractor/Supplier be participating in this contract? *

○ Yes   ● No

★ Required

If you choose "YES" indicating that there is more than one Contractor/Supplier participating in this contract, you will be asked to fill out the same information for the additional Contractor/Supplier. It will look like this.

< Previous   Save Progress   Next >

Multiple Contractors/Suppliers

If more than one additional, please attach (in the "Attachments" section) a document containing the same contact information (including "Contract Notice Contact" information) for each additional Contractor/Supplier as you have provided above for the Second Party.

Additional Contractor/Supplier Name *

Additional Contractor/Supplier Primary Contact's Name *

Additional Contractor/Supplier Address: *

Additional Contractor/Supplier City/State/ZIP *

Additional Contractor/Supplier Email Address: *

Additional Contractor/Supplier Phone Number: *

Additional Contractor/Supplier Fax Number:

21

Back Office screen:

Review and Complete screen:

‹ Back to My Contract Requests

Texas A&M Demo

Form Number: 3716413
Request Status: Incomplete

Instructions

Details

Attachments   **0**

Questions   ✔

   Contract Information   ✔

   Routing Determination   ✔

   Award Documents   ✔

   Electronic Information Re...   ✔

   Departmental Information   ✔

   Second Party Information   ✔

   Back Office   ✔

Review and Complete

Discussion

Contract Request Workflow

Review and Complete   🖨 Print Request | History | ?

✔   Required fields complete

Section	Progress
Instructions	✅ No Required fields
Details	✅ No Required fields
Attachments	✅ No Required fields
Questions	✅ Required fields complete
Contract Information	✅ Required fields complete
Routing Determination	✅ Required fields complete
Award Documents	✅ Required fields complete
Electronic Information Resources (EIR)	✅ Required fields complete
Departmental Information	✅ Required fields complete
Second Party Information	✅ Required fields complete
Back Office	✅ Required fields complete

The "Review and Complete" screen indicates the overall completion status of the Contract Request Form. When all sections of the Contract Request Form are complete, the "Complete Request" button becomes active and all "checks" are green.

When you select the "Complete Request" button the Contract Request is submitted to Contract Administration.

‹ Previous   **Complete Request**

Discussion screen:

The "Discussion" screen allows you to post messages to, and receive replies from, anyone who has access to the Request Form, such as the approvers and Procurement Services and/or Contract Administration personnel. Clicking the "Start New Thread" button pops up this "Post a New Message" box.

NOTE: Attachments can be added to a message.

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

The person to whom you send the message to will receive a notification either in their email inbox or in the "notifications" section of AggieBuy depending on how they have their notifications set.

Contract Request Workflow screen:

Think of this screen as the Transmittal Form

Workflow Step Approvers (New Supplier Set-Up-2) ? X
Approver Group : 02-New Supplier 2nd Party Set-up (all Members)
Brandie Watson   B.WATSON@TAMU.EDU   +1 979-845-8286
Paul Admin Barzak   p-barzak@tamu.edu   +1 979-845-3816
Close

Texas A&M Demo
Form Number: 3716413
Request Status: Incomplete

Instructions
Details
Attachments   0
Questions   ✓
    Contract Information   ✓
    Routing Determination   ✓
    Award Documents   ✓
    Electronic Information Re...   ✓
    Departmental Information   ✓
    Second Party Information   ✓
    Back Office   ✓
Review and Complete

Discussion

Contract Request Workflow

★ Required

Contract Request Workflow   Print Request   History   ?

Submitted Future → Document Check/Catch (Future / View approvers) → Originator (Future / View approvers) → Department Head (Future / View approvers) → Dean or Unit Director (Future / View approvers) → Specialized Approval 2 (Future / View approvers) → Specialized Notification (Future / View approvers) → Procurement Services (PS) (Future / View approvers) → New Supplier Set-Up-2 (Future / View approvers) → Finish

Workflow Step Approvers (Document Check/Catch) ? X
Approver Group : 02-Initial Stop for all Contract Requests (all Members excluding 04)
Lindy Beasley   LBEASLEY@TAMU.EDU   +1 979-845-0099
Paul Admin Barzak   p-barzak@tamu.edu   +1 979-845-3816
Tammy Prater   TPRATER@TAMU.EDU   +1 979-845-0099
Close

Workflow Step Approvers (Specialized Approval 2) ? X
Approver Group : 02-EIR Use Not Listed (02, 10, & 23)
Phylis Zimmermann   PZIMMERMANN@TAMU.EDU   +1 979-458-6537
Puneet Gaddam   PGADDAM@TAMU.EDU   +1 979-458-1590
Close

Workflow Step Approvers (Procurement Services (PS)) ? X
Approver Group : 02-Procurement Services - TAMU Paper (Team-1
Cherise Toler   CTOLER@TAMU.EDU   +1 979-845-5887
Patricia Winkler   P-WINKLER@TAMU.EDU   +1 979-845-4556
Susan King   SA-KING@TAMU.EDU   +1 979-845-3888
Close

Workflow Step Approvers (Originator) ? X
Approver Group : 02-CLED Originator - Admin - Dean
Jason Foley   JASON.FOLEY@TAMU.EDU   +1 979-845-4138
Jill Hobbs   JILLHOBBS@TAMU.EDU   +1 979-845-5365
Close

Workflow Step Approvers (Department Head) ? X
Approver Group : 02-CLED Department Head - Admin - Dean - MC
Suprena Bennett   SUPRENAB@TAMU.EDU   +1 979-862-1342
Close

Workflow Step Approvers (Dean or Unit Director) ? X
Approver Group : 02-CLED Dean or Unit Director - Admin - Dean
Beverly Irby   IRBYB@TAMU.EDU   +1 979-845-1831
Suprena Bennett   SUPRENAB@TAMU.EDU   +1 979-862-1342
Valerie Hill-Jackson   VHJACKSON@TAMU.EDU   +1 979-845-8384
Close

This "Contract Request Workflow" screen indicates graphically the approval path your completed Request Form will follow.

NOTE: The "Document Check/Catch" step is a temporary step to allow Contract Administration and system administrators to monitor the approval path during the early days of the system's launch.

NOTE: The "Specialized Approval" step only occurs when your request involves an EIR that has not been previously approved by the IT Accessibility office.

The "Procurement Services" step only occurs if the contract is an expense contract over $10K.

The "New Supplier Set-Up" step only occurs when the Second Party does not have an active profile in the AggieBuy System.

25

Contract Request Notifications:

The following are examples of Notification emails that the contract requestor will receive if they have their Notifications preferences set to "email":

This is an example of a notification email received by the contract requestor when a step in the Contract Request Workflow has been completed. If the requestor has their notification preferences set to email they will receive an email each time a step is approved.

This is an example of a notification email received by the contract requestor when the Contract Request has been completed and is ready to be converted to a Contract.

From: JAGGAER Support <aggiebuy@sciquest.com>
Sent: Wednesday, February 17, 2021 11:02 AM
To: Lynce, Loria D <lynce@tamu.edu>
Subject: Form Request Workflow for 21-02-18-Cuero Regional Hospital has been Approved

From: JAGGAER Support <aggiebuy@sciquest.com>
Sent: Thursday, February 11, 2021 2:53 PM
To: Lynce, Loria D <lynce@tamu.edu>
Subject: Form Request Workflow for 21-02-10-Mark Tabarrok, MD has been Completed

TEXAS A&M UNIVERSITY

RE: Form Request Workflow for 21-02-18-Cuero Regional Hospital has been Approved

Dear Loria Lynce,

Your request for 21-02-18-Cuero Regional Hospital has been approved.

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

Thank You,

Texas A&M University

Support Team Contact Information:

AggieBuy@tamu.edu

TEXAS A&M UNIVERSITY

RE: Form Request Workflow for 21-02-10-Mark Tabarrok, MD has been Completed

Dear Loria Lynce,

Your request for 21-02-10-Mark Tabarrok, MD has been completed.

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

Thank You,

Texas A&M University

Support Team Contact Information:

AggieBuy@tamu.edu

When you receive this email, clicking this link will take you directly to the Contract Request. You can then click on the "Contract Request Workflow" screen to see what step the Contract Request is in.

When the Contract Request is complete this **DOES NOT** mean that the Contract review/approval by Contract Administration is complete. Think of the Contract Request as the transmittal form. When the Contract Request is complete that means the Contract Transmittal form has been completed and signed and is now ready to be submitted along with the contract to the Department of Contract Administration for review. Once the Contract Request is complete the following will occur:

1. Contract Administration will convert the Contract Request into a Contract
2. The Contract will receive a "C" number (i.e. C2021-2970)
3. The Contract will be reviewed and approved and sent out for signature by Contract Administration
4. The contract requestor (who is also known as the department stakeholder) will receive a notification when the contract has been approved by Contract Administration and is fully executed.