Create a Contract Request

Reference Guide for Contract Requesters

Initial Login

To login, access TCU portal via the following URL: Jaggaer - Prod - Sign In

How to Create Contract Requests and Search for Requests/Contracts

As a Contract Requester, you will create a Contract Request for any need you believe requires a contract. If you are unsure of the need for a contract please reference the how and when to request a contract guide.

The Contract Request consists of completing some preliminary questions and information, attaching supporting documents and/or a supplier contract. Once submitted, the Contract Request will be routed for approvals, as applicable, and forwarded to the Contract Manager. The Contract Manager will review the request, approve or reject the request, create the contract record, submit the contract to the appropriate parties for review and approval, and send the contract for e-signature.

This reference guide is intended to illustrate the process of creating a contract request and provide commentary.

Note: Based on the selections you make in certain fields, other fields may or may not be visible. If you do not see a field on your request form that is in the below guide that is because the visibility on that field was not triggered, meaning you can continue completing your request.

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Request a Contract. To create a Contract Request, click on the contract icon on the left tab, then *Request Contract* under the *Requests* tab. Or, From the home dashboard under Quick Links Select *Request Contract*
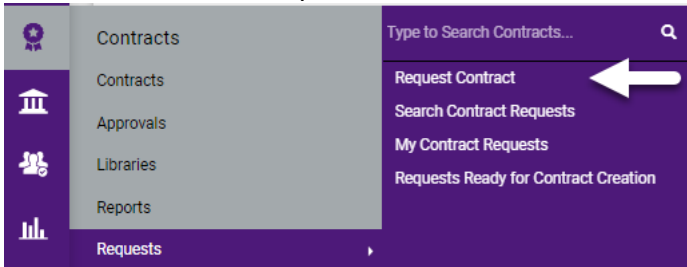
Or
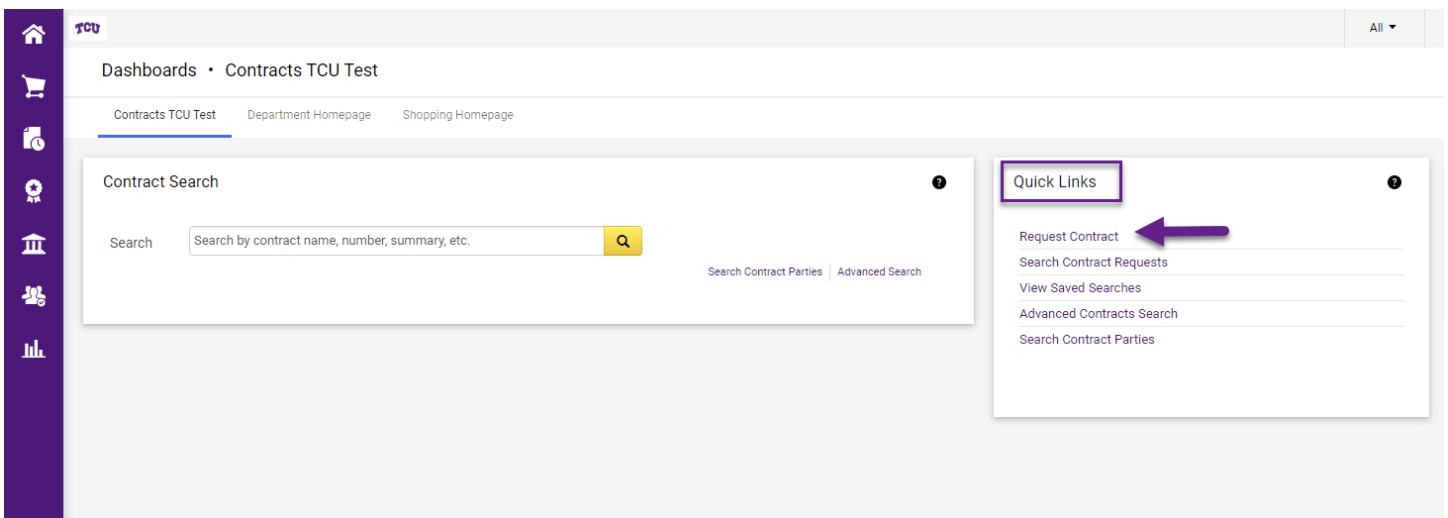
Create a Contract Request. Give the request a name in the "Request Name" field and click *Submit* to begin completing the Contract Request. Please note, there is only one template for a Contract Request which will default to "Contract Request".
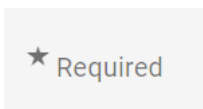
Note: ★ is a required field and must be completed

Instructions. The Instructions page contains some information about the Contract Request. Click on any of the tabs on the left side of the screen to go directly to a specific page of the Contract Request or click *Next* to

proceed to each page in order. Green check marks indicate that the required fields for that page have been completed.

Attachments. Click on the *Attachments* tab on the left side of the screen. Attach the proposed contract to the request, the 3rd Party Contract, and any other preliminary forms or information that should be submitted to the Contract Manager, such as Procurement Justifications, by clicking *Add Attachments*, then select files to upload and click *Save Changes*.

Questions. The Questions page contains questions that must be answered to complete the contract request. Certain individual questions will only be visible based on how you answered previous questions. Every question with a star after it is required. Complete all the required questions.

Note: ❷ When selected will provide more guidance surrounding the information requested.

Question Groups
General Questions that will appear on every Contract Request

Group 1.1: General Information		
#	**Question Text**	**Response Type**
1.1.1	Contract Name	Standard (Contract Name)
1.1.2	Second Party	Standard (Second Party)
1.1.3	Second Party Contact Name	Text (Single Line)
1.1.4	Second Party Contact Email Address	Text (Single Line)
1.1.5	Second Party Signatory Name	Text (Single Line)
1.1.6	Second Party Signatory Email Address	Text (Single Line)

Group 1.2: General Information

#	Question Text	Response Type
1.2.1	Contract Type:	Dropdown List (Pick One)
1.2.2	Work Group	Standard (Work Group)
1.2.3	Department Contact	Text (Single Line)
1.2.4	Department Contact Email Address	Text (Single Line)
1.2.5	Start Date	Standard (Start Date)
1.2.6	End Date	Standard (End Date)
1.2.7	Contract Value	Monetary Value

Contract Type Questions

Depending on the Contract Type Selected in the General Questions above the below will be asked:

Group 2.1: Advertising/Media Buy

#	Question Text	Default Value	Response Type
2.1.1	Ad Type ★		Dropdown List (Pick One)
2.1.2	Other Ad Type ★		Text (Single Line)
2.1.3	Please attach advertising/media buy order ★		File Upload
2.1.4	Will the total amount paid by TCU for this Advertising/Media Buy exceed $5,000? ★		Yes/No

Group 2.2: Construction & Skilled Trade Services

Group 2.3: Domestic Travel

#	Question Text	Default Value	Response Type
2.3.1	Trip Purpose ★		Text (Multi-Line)
2.3.2	Who is Traveling ★		Text (Multi-Line)
2.3.3	Domestic Travel Contract Type ★		Dropdown List (Pick One)
2.3.4	Please attach Hotel Contract ★		File Upload
2.3.5	Other Travel Type ★		Text (Single Line)
2.3.6	Bus Charter Confirmation Number ★		Text (Single Line)

Group 2.4: Education Agreements & MOUs

#	Question Text	Default Value	Response Type
2.4.1	Will you use a TCU approved Education Agreement form ★		Yes/No
2.4.2	Form Education Agreements ★		Dropdown List (Pick One)
2.4.3	Has the 2nd Party provided their own Education Agreement or MOU? ★		Yes/No
2.4.4	Please upload the 2nd Party's proposed Education Agreement or MOU. ★		File Upload

Group 2.5: Event

Does your company have a Master Services Agreement with TCU? Please check the current list TCU MSA Listing. If your company is on the procedures to process your order.

#	Question Text	Default Value	Response Type
2.5.1	Event Type ★		Dropdown List (Pick One)
2.5.2	Speaker Name ★		Text (Single Line)
2.5.3	Speaker Topic ★		Text (Single Line)
2.5.4	Speaker Engagement Type ★		Dropdown List (Pick One)
2.5.5	Meeting Software ★		Dropdown List (Pick One)
2.5.6	Speaker Travel Cost ★		Monetary Value
2.5.7	Location ★		Text (Single Line)
2.5.8	Speaking Event Date ★		Date

Group 2.6: License Agreement

#	Question Text	Default Value	Response Type
2.6.1	Will you use a TCU approved License Agreement		Yes/No
2.6.2	Form License Agreements ★		Dropdown List (Pick One)

Group 2.7: Professional Services

#	Question Text	Default Value	Response Type
2.7.1	Project Name ★		Text (Multi-Line)
2.7.2	Description of Services ★		Text (Multi-Line)
2.7.3	Project Objectives ★		Text (Multi-Line)
2.7.4	Required Deliverables ★		Text (Multi-Line)
2.7.5	Payment Schedule ★		Text (Multi-Line)

Group 2.8: Real Estate

Group 2.9: Revenue

#	Question Text	Default Value	Response Type
2.9.1	Revenue Form Question ★		Dropdown List (Pick One)
2.9.2	Experiential Learning Project Name ★		Text (Multi-Line)
2.9.3	Experiential Learning Semesters ★		Text (Multi-Line)
2.9.4	Experiential Learning Number of Weeks ★		Numeric Text Box

Group 2.10: Sponsored Research

Group 2.11: Study Abroad

Group 2.12: Technology

#	Question Text	Default Value	Response Type
2.12.1	Technology Risks ★		Multiple Select (Pick Many)

Discussions. Click on the *Discussions* tab on the left side of the screen to add a message to the Contract Manager regarding the contract.

Contract Request Instructions

Form Number: 678642
Request Status: Incomplete

Instructions

Details

Attachments   0

Questions   ✓

   General Information   ✓

   Contract Type Details   ✓

Review and Complete

Discussion ⬅

Discussion

Start New

There are

Post a New Message   ✕

Subject ★   [   ]

Message ★   [   ]

           5000 characters remaining

Add Attachments

★ Required   Post Message   Close

Review and Complete. If any of the Required Fields (Questions with an asterisk beside them) are not completed, the page will be shown as grey and say *Incomplete*. Once all Required Fields are completed, the Review and Complete page will show green check marks and will say *No Required Fields* or *Required Fields Complete*.

Contract Request Instructions

Form Number: 678642
Request Status: Incomplete

Instructions
Details
Attachments   **0**
Questions   ✔
   General Information   ✔
   Contract Type Details ✔
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
General Information	✔	Required fields complete
Contract Type Details	✔	Required fields complete

★ Required   ‹ Previous   **Complete Request**

Submit Request. Click *Complete Request* to submit the Contract Request. The Contract Request will be submitted and shown as "Under Review". The Contract Manager for your Department will be sent a notification of a pending request.

Contract Request Instructions

Form Number: 678642
Request Status: Incomplete

Instructions
Details
Attachments   **0**
Questions   ✔
   General Information   ✔
   Contract Type Details ✔
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
General Information	✔	Required fields complete
Contract Type Details	✔	Required fields complete

★ Required   ‹ Previous   **Complete Request**

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Check Status of your Request. After submitting a Contract Request, check the status of your Request from any screen, by clicking on the contract icon and browsing to Requests > My Contract Requests.
Or, From the home dashboard under Quick Links Select *Search Contract Requests*

Or

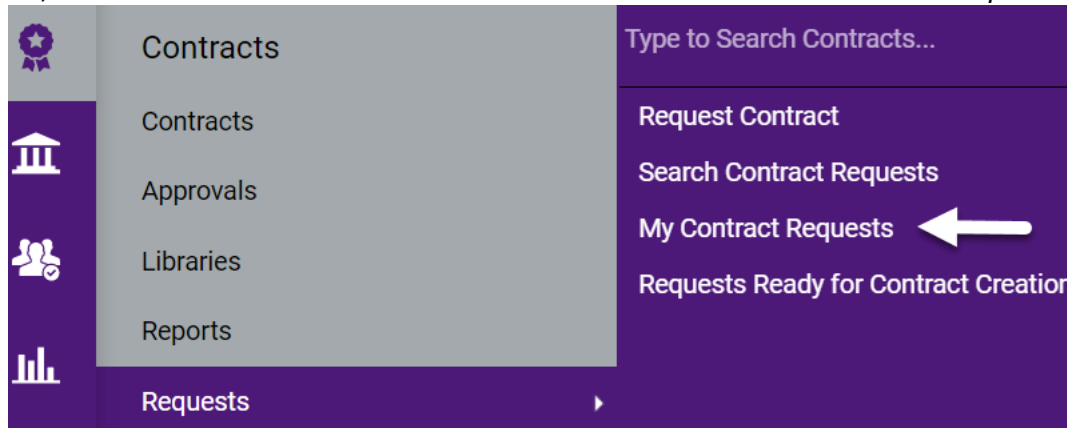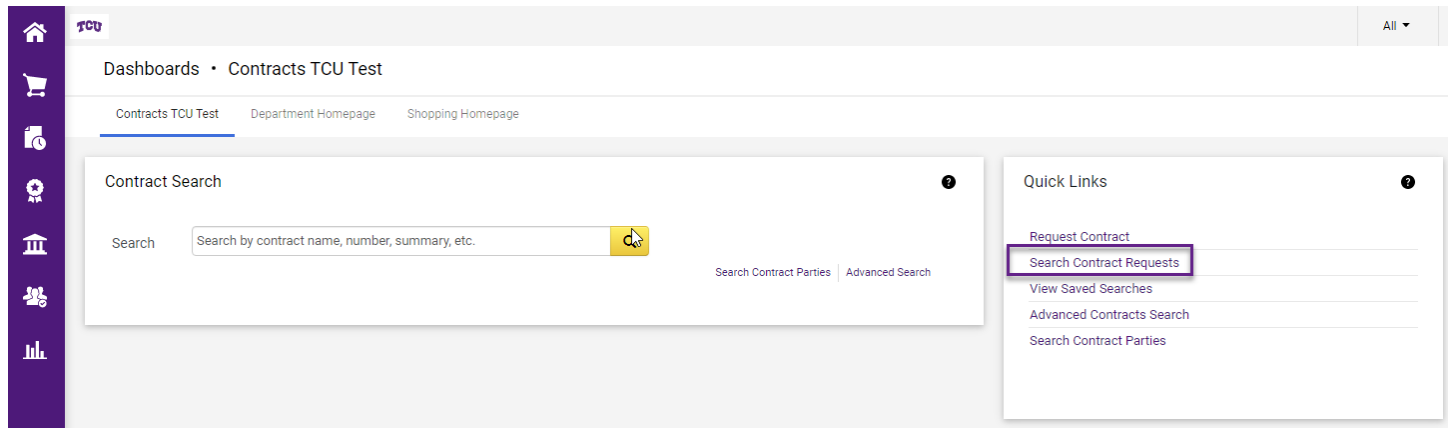This will return the list of all Contract Requests you created. The Form Statuses are as follows:

- *Incomplete* – this is a draft request, meaning you are working on it
- *Under Review* – this is a request you have submitted but it has not been approved/processed
- *Approved* – this is a request that has been fully approved but has not been converted into a contract yet
- *Complete* – this is a request that has been approved and converted into a contract

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You can see where a request is in the approval process or access the corresponding contract by clicking the Contract Request Name to open the request.

	Form Name ▼	Request Number ▼	Form Status	Created Date/Time ◉	Template Name	Current Workflow Step	Pending Approver	Requestor	Submitted Date ▼	Completed Date ▼
☐	Contract Request Instructions	692766	Incomplete	6/27/2022 1:28:14 PM	Contract Request	-	-	Chancellor Requester	–	–
☐	Bus Charter for Alondra	690902	Approved	6/23/2022 1:28:45 PM	Contract Request	-	-	Chancellor Requester	6/23/2022 1:31:21 PM	6/23/2022 1:34:10 PM
☐	Bus Charter for Alondra	690901	Approved	6/23/2022 1:25:35 PM	Contract Request	-	-	Chancellor Requester	6/23/2022 1:26:45 PM	6/23/2022 1:32:20 PM
☐	Speaker	690224	Approved	6/22/2022 3:14:08 PM	Contract Request	-	-	Chancellor Requester	6/22/2022 3:16:46 PM	6/23/2022 9:22:22 AM
☐	Catering	690223	Approved	6/22/2022 3:07:28 PM	Contract Request	-	-	Chancellor Requester	6/22/2022 3:09:37 PM	6/23/2022 1:10:36 PM
☐	Bus Charter	690166	Approved	6/22/2022 11:07:24 AM	Contract Request	-	-	Chancellor Requester	6/22/2022 11:08:28 AM	6/23/2022 1:18:40 PM
☐	Food Truck	690165	Approved	6/22/2022 11:05:49 AM	Contract Request	-	-	Chancellor Requester	6/22/2022 11:07:16 AM	6/23/2022 1:35:31 PM
☐	Bus Charter	689323	Completed	6/16/2022 1:14:47 PM	Contract Request	-	-	Chancellor Requester	6/16/2022 1:17:50 PM	6/16/2022 1:20:39 PM

If the request has not been completed yet and you wish to see who is the next approver you can click on the *Contract Request Workflow* link in the left-hand menu to see where your request is in workflow.

Once a request has been converted to a contract a link to the contract is added to the request in the shaded box in the upper left corner. Click that link to access the contract. Please keep in mind that the contract may

be in "Draft" status as there is still work the Contract Manager needs to perform to execute the contract.

Contract Request Instructions

Form Number:	678625
Request Status:	Completed
Contract:	TCU-TCU-000027-FY2022

Instructions

Details

Questions ✔

   General Information ✔

   Contract Type Details ✔

Instructions   🖶 Print Request | History | ?

Please complete the following forms and questions.

The Contract Statuses are as follows:

- **Draft** - The contract is under construction and has not been submitted for approval.
- **Internal Review** – this is a draft contract that has been authored but is being reviewed internally by the USNH Contracts Team.
- **External Review** – this is a draft contract that has been authored but has been sent for review to any pertinent parties outside of TCU. This may include the Second Party/Vendor, Risk Management, etc.
- **Out For Signature** – this is a contract that is complete and has been submitted for either electronic signature setup by the Contract Manager or is awaiting a fully signed contract to be uploaded by the Contract Manager.
- **Pending Signature** – this is a contract that is complete and has been submitted for electronic signature.
- **Executed: Future** - The contract is approved, but will not be in effect until its scheduled start date
- **Executed**: In Effect - The contract is approved and active.
- Expired - A contract is automatically marked as expired once its scheduled end date has passed.
- **Complete** - The contract has reached its scheduled end date and all steps required to close the contract have been done.
- **Terminated** - The contract has been stopped before its scheduled end date. A termination is used post-execution, when terms cannot be reached and the contract will not go forward. You can copy and print a terminated contract, but it cannot be returned to active status.