

TCM: Contract Requests

Overview

- This job aid is intended for employees who want to request to enter a contract on behalf of Baylor University.
- In certain circumstances, a written contract will be the preferred method for acquiring goods or services. These guidelines will be outlined in the Buy and Pay Guide, and in the Contract Types and Templates Guide.
- At any time an employee can initiate and complete the process of requesting a contract in TCM.

Note: JAGGAER (TCM) syncs with Oracle frequently such that new Suppliers are updated in TCM. Employees should ensure that Suppliers have completed the registration process prior to requesting a contract for Goods and Services with that Supplier.

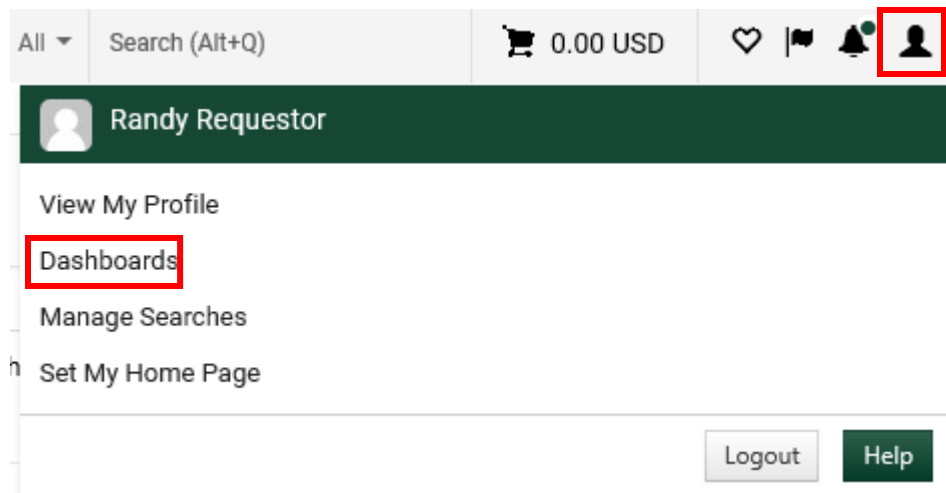
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I. Accessing Total Contract Manager (TCM)

1. TCM Live Environment is accessible at: baylor.edu/tcm. Use this site to explore current contacts, add new contacts, or access the contract templates available for future contracts on behalf of Baylor University.
2. A Test and Training Environment is also available at: baylor.edu/tcmtest. Please use this site if you are new to TCM and need to practice navigating the system, entering contract requests, etc.
3. Both sites can be accessed using your Bear ID and Password.

2. Navigating to Contract Request Dashboard

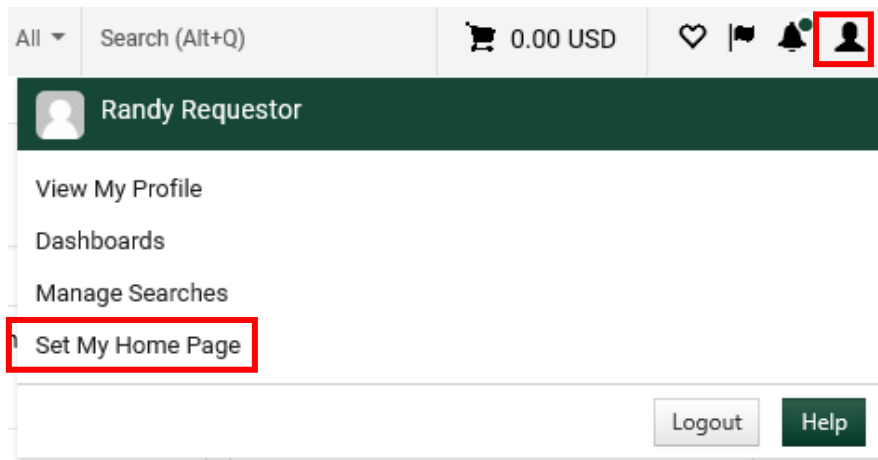
1. Upon login, if the **Contract Requestor** Dashboard is not your homepage, click the **Me icon**  next to your name in the top right corner.
 - a. Select **Dashboards**.



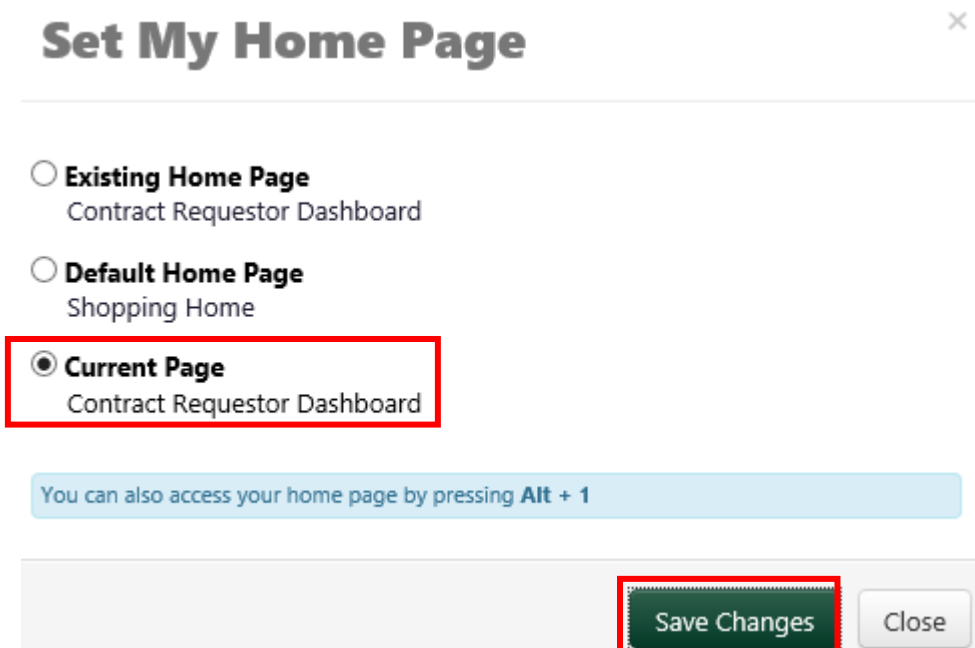
Note: The dashboard based on your user login will open

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2. Make this dashboard your home page by selecting the **Me Icon**.
 - a. Select **Set My Home Page**

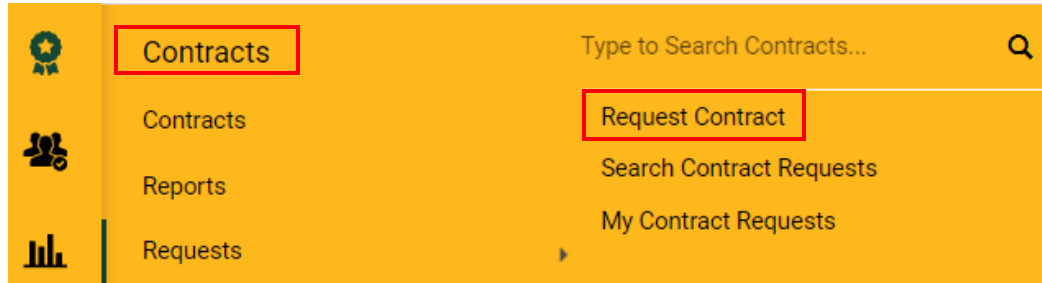


3. On the Set My Home Page screen, select **Current Page** and **Save Changes**.

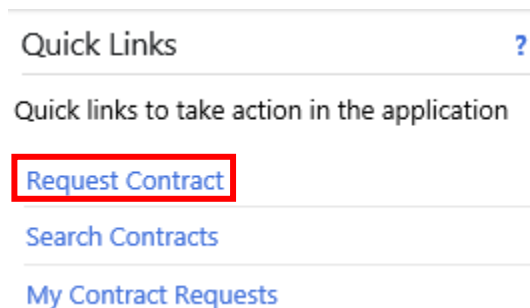


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4. On the **Contract Requestor Dashboard**, you can request to a contract in two ways.
 - a. (Option 1) Click the **Contracts icon** on the left tab bar and select **Request Contract**.

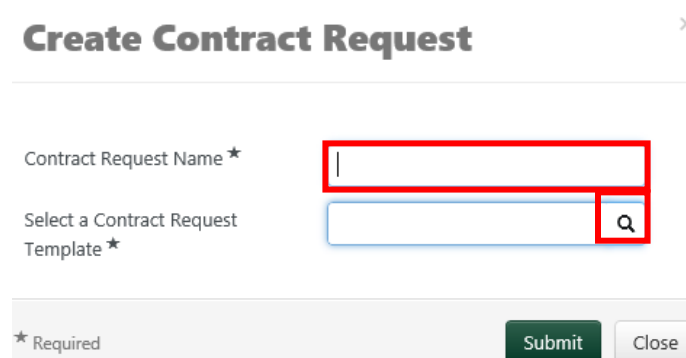


- b. (Option 2) In the **Quick Links** section of your home page, click **Request Contract**.



3. Creating the Contract Request

- I. The **Create Contract Request** window will open. Complete all required fields.
 - a. **Contract Request Name***: Title of the contract. The standard recommended naming convention for contracts is a Department Abbreviation - Second Party Name - Subject Matter of the Contract. *Example: AAAS – Praxair - Gas Supply - Purchase Contract.*

A screenshot of the 'Create Contract Request' form. The title 'Create Contract Request' is at the top right with a close icon. Below it, there are two required fields: 'Contract Request Name *' and 'Select a Contract Request Template *'. The 'Contract Request Name' field is highlighted with a red box. The 'Select a Contract Request Template' field is a dropdown menu with a search icon, also highlighted with a red box. At the bottom, there is a legend for the asterisk, a 'Submit' button, and a 'Close' button.

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- b. **Select a Contract Request Template***: Click the **Search icon**. Click Select to the right of the appropriate template based on the Contract Type. *This example is for **Goods and Services**.*

Select a Contract Request Template ×

Name	Description	
Employment	-	Select
Goods or Services	-	Select
Other	-	Select
Revenue-Generating	-	Select

- c. The Create Contract Request window will now reflect the Name provided and the Template selected. Click **Submit**.

Create Contract Request ×

Contract Request Name *	Stellar Scientific-Autoclave Purchase
Select a Contract Request Template *	Request For Goods or Services × Q
★ Required	Submit Close

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2. You are now ready to begin filling in the contract request. Click the **General** tab.

The screenshot shows the Ignite SIT interface. At the top, there is a navigation bar with a home icon, a shopping cart icon, a star icon, a person icon, and a bar chart icon. The main content area displays the following information:

- Contracts > Requests > My Contract Requests
- < Back to My Contract Requests
- AAAS-Stellar Scientific-Autoclave Purchase**
- Form Number: 424649
- Request Status: Incomplete
- Instructions**
- Details
- Attachments (0)
- Questions (✓)
- General** (✓)
- Risk Questionnaire (✓)
- Review and Complete

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- a. Populate all relevant & required fields*.
 - i. **Second Party:** The party Baylor is contracting with - if the party is a supplier, or if the contract is revenue generating, the individual or entity should be registered as a Supplier in Oracle *prior to entering the Contract Request*.
 - ii. **Second Party Contact Name & Email**
 - iii. **Second Party Signatory Name & Email***

The screenshot displays the Oracle Contract Request interface. On the left is a navigation menu with sections: Instructions, Details, Attachments (0), Questions (checked), General (checked), Risk Questionnaire (checked), Review and Complete, Discussion, and Contract Request Workflow. The main content area is titled 'Second Party Information' and contains several input fields, each highlighted with a red box:

- Second Party:** A dropdown menu with a search icon and the placeholder text 'Type to filter...'. A red box highlights this field.
- Additional Second Parties:** A dropdown menu with a search icon and the placeholder text 'Type to filter...'. A red box highlights this field.
- Second Party Contact Name:** A text input field. A red box highlights this field.
- Second Party Contact Email Address:** A text input field. A red box highlights this field.
- Second Party Signatory Name:** A text input field with an asterisk indicating it is required. A red box highlights this field.
- Second Party Signatory Email Address:** A text input field with an asterisk indicating it is required. A red box highlights this field.

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- iv. **Contract Name***: Copy and paste the Contract Request Name into the Contract Name.
- v. **Select a Baylor Contract Template to use, if applicable. Note: it is preferable to utilize a Baylor template for contracting for goods and services***: See the Contract Types and Templates Guide to determine whether a Baylor template applies to your contract. If a Baylor Template is available, it is preferable to use the template instead of second party paper.

Contract Name * ⓘ

AAAS - Robert Smith - Guest Speak

Select a Baylor Contract Template to use, if applicable. Note: it is preferable to utilize a Baylor template for contracting for goods and services. *

Speaker/Performer ▼

Title of Presentation

Procurement Category

Professional Services ▼

Work Group * ⓘ

Student Life
In: Baylor University

Reimbursable Expenses

Yes No

Department

Spiritual Life

Approved Reimbursable Expenses

2000 characters remaining

Note: Any custom fields associated with a Baylor template will populate and should be completed. For example, if the Speaker/Performer Template is selected, the fields for completing the Speaker/Performer Template will appear and should be completed (as shown below). A list of these fields is available in the Contract Types and Template Requirements Guide.

If Second Party Paper is used, upload the contract on the Attachments tab, along with any supporting documentation or Certificates of Insurance needed.

Content and Subject Matter

2000 characters remaining

Event and/or Location

2000 characters remaining

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- vi. **Procurement Category:** Select from the drop-down list.
- vii. **Work Group*:** The department or division requesting the contract.
- viii. **Department Address & Contact Information**
- ix. **Contract Summary*** - click **Edit Summary** to add content.
- x. **Start Date*:** Effective date of the contract (start of the term).
- xi. **End Date*:** Date of Expiration (end of the term).

Procurement Category <input type="text" value="Professional Services"/>	Department Contact <input type="text" value="Rita Smith"/>
Work Group * ⓘ <input type="text" value="Student Life In: Baylor University"/>	Department Contact E-mail address <input type="text" value="baylorcontracts@gmail.com"/>
Department <input type="text" value="Spiritual Life"/>	Department Phone Number <input type="text" value="254-710-0000"/>
Department Address <input type="text" value="555 W Waco Dr. Waco, TX 76657"/> 1970 characters remaining	Contract Summary * ⓘ <i>No Text Entered</i> <input type="button" value="Edit Summary"/>
	Start Date * ⓘ <input type="text" value="mm/dd/yyyy"/> <input type="checkbox"/> Update Start Date Upon Execution ⓘ
	End Date * ⓘ <input type="radio"/> Expires On <input type="radio"/> No Expiration

- b. Click **Next** to continue, or **Save Progress** to return to the draft request at a later time.

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3. Review the **Risk Questionnaire** Section and select all appropriate boxes under each Section. If no Risk issues are present, select N/A for that section.
 - a. **Campus Security and Safety***
 - b. **Capital Equipment, Assets, and Buildings***
 - c. **Data or Privacy Issues***
 - d. **Environmental Health & Safety***
 - e. **Import and Export Compliance***
 - f. **Information Technology***
 - g. **Insurance Requirements***
 - h. **University Brand, Licensing, and Reporting***

Questions - Risk Questionnaire [Print Request](#) | [History](#) | [?](#)

Instructions

The Risk Questionnaire is designed to gather information about the requested contractual relationship to help Baylor departments determine the level of risk the agreement poses to the University. Please answer the following questions to the best of your ability.

Risk Questionnaire

Campus Security and Safety * ⓘ

Special Events or Large Gatherings on Campus Student Run Activity N/A
 Youth Protection Suppliers on Campus

Capital Equipment, Assets, and Buildings * ⓘ

Installation of Equipment on Campus Alterations to Buildings, Walls, Fixtures Credit Card Processing Equipment
 Lease of Goods, Equipment, or Assets Purchase of Vehicle, Boat, Golf Cart, Or Trailer N/A

Data or Privacy Issues * ⓘ

Transfer of Student Information Transfer of Medical or Health Information University Data N/A
 Transfer of Personally Identifiable Information Intellectual Property Transfer of Research Data

Environmental Health & Safety * ⓘ

Chemicals, Substances, Biohazardous Agents, Agents, or Living Organisms Ionizing and Non-ionizing Radiation N/A

Import and Export Compliance * ⓘ

Hiring Foreign Nationals International Shipment of Goods Receiving Funds from International Second Party
 External Collaborations Human Research Foreign Student Recruitment
 Transfer of Materials International Second Party N/A

Information Technology * ⓘ

Purchase of Software, Hardware, or Technology Access to Baylor's Network Security Review and Idea Form Completed N/A

Insurance Requirements *

On-Campus Events Baylor to Provide Evidence of Insurance N/A
 Professional Services On-Campus Services or Installation

University Brand, Licensing, and Reporting * ⓘ

Licensing or Trademark Issues Mission Related Issues Collaborative Academic Arrangements N/A

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- Click **Next** to continue, or **Save Progress** to return to the draft request at a later time.



4. Review and Complete

- Under the Progress column, ensure you have all green check marks to proceed.
- Click **Complete Request** to submit.

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	✓ Required fields complete
Risk Questionnaire	✓ Required fields complete

★ Required [Previous](#) [Complete Request](#)

Note: A Contract Request cannot be submitted without all required information.

- Click **Yes** on the Confirmation pop-up window to complete your contract request.

Confirm ×

Are you sure are ready to complete your new contract request?

[Yes](#) [No](#)