

# 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.

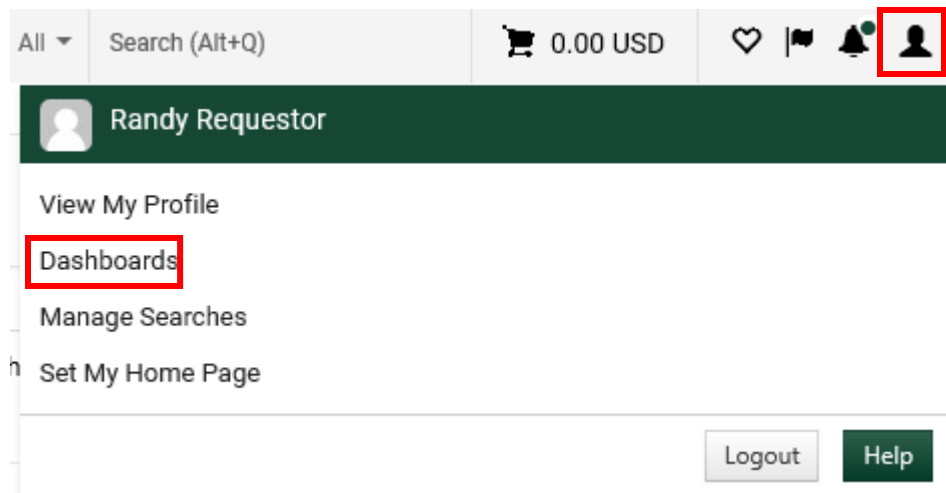
# TCM: Contract Requests

## I. Accessing Total Contract Manager (TCM)

1. TCM Live Environment is accessible at: [baylor.edu/tcm](https://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](https://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

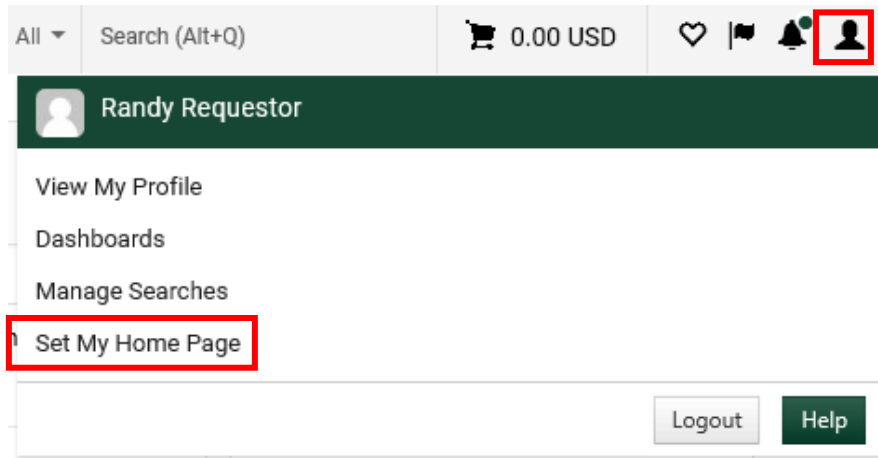
1. Upon login, if the **Contract Requestor** Dashboard is not your homepage, click the **Me icon**  next to your name in the top right corner.
  - a. Select **Dashboards**.



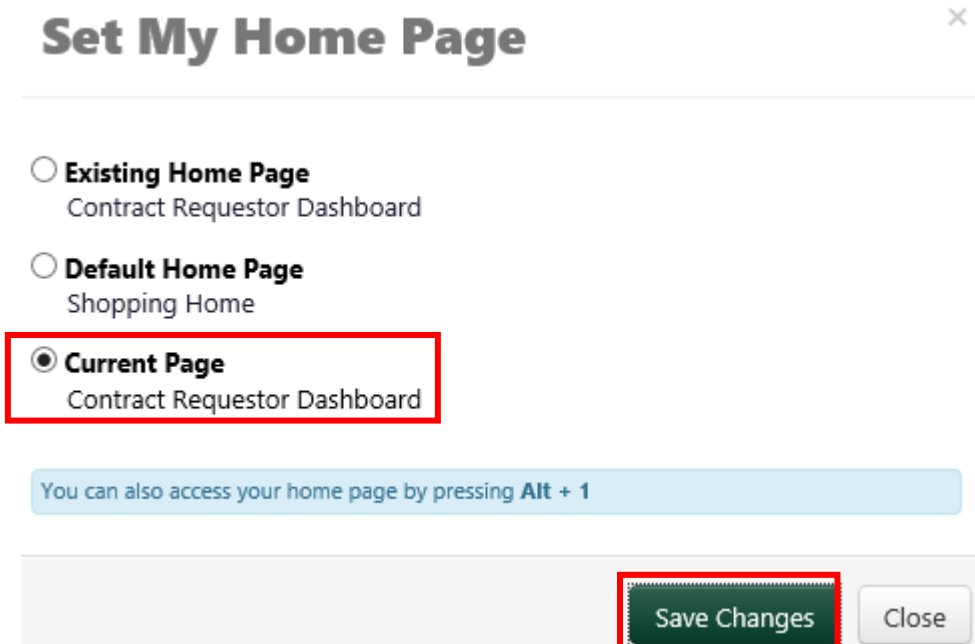
*Note: The dashboard based on your user login will open*

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

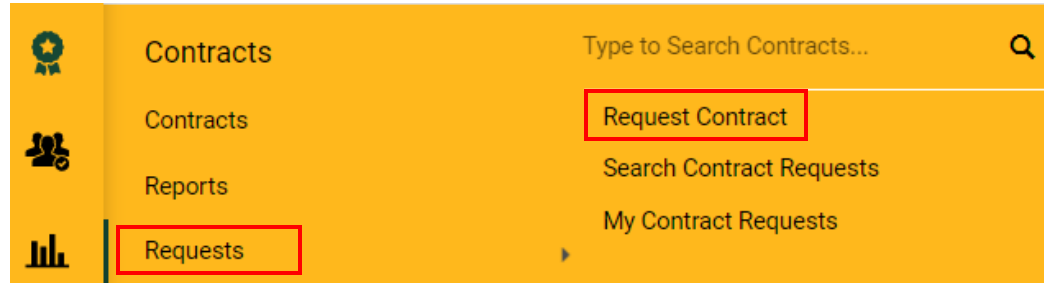


3. On the Set My Home Page screen, select **Current Page** and **Save Changes**.

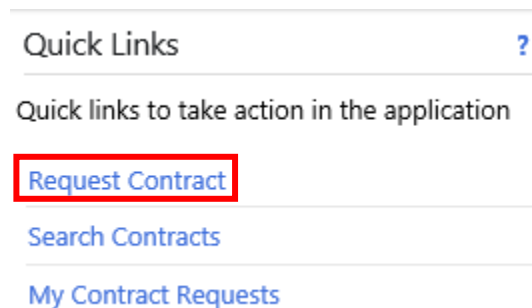


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4. On the **Contract Requestor Dashboard**, you can request to a contract in two ways.
  - a. (Option 1) Click the **Requests icon** on the left tab bar and select **Request Contract**.

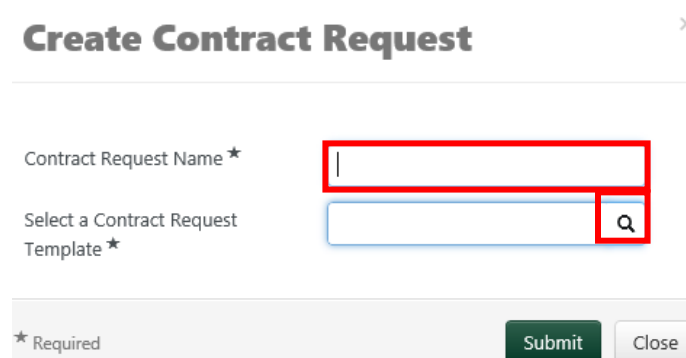


- b. (Option 2) In the **Quick Links** section of your home page, click **Request Contract**.



## 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 the title, 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 also highlighted with a red box and contains a search icon. 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

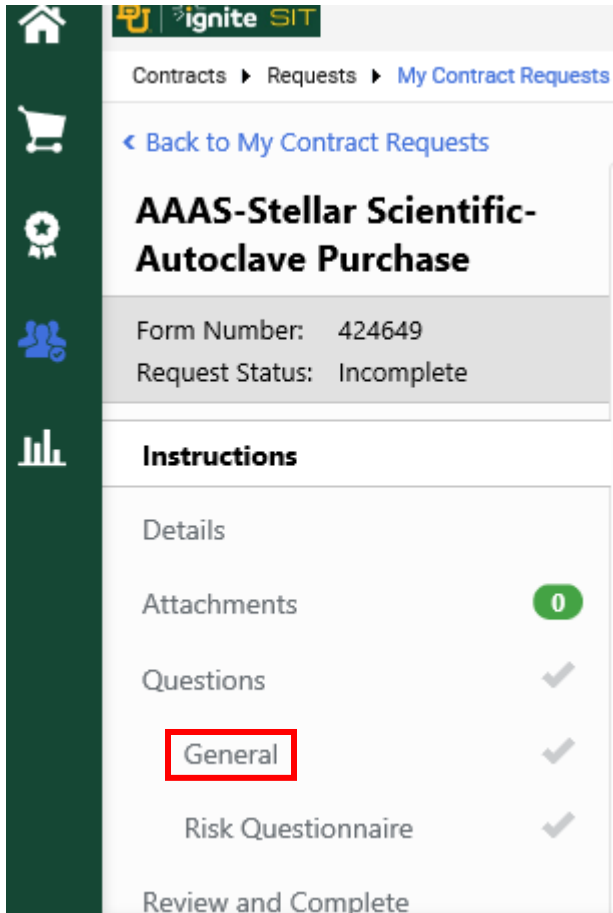
- c. The Create Contract Request window will now reflect the Name provided and the Template selected. Click **Submit**.

## Create Contract Request ×

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

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



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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 fields:

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

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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).

<b>Procurement Category</b> <input type="text" value="Professional Services"/>	<b>Department Contact</b> <input type="text" value="Rita Smith"/>
<b>Work Group *</b> ⓘ <input type="text" value="Student Life In: Baylor University"/>	<b>Department Contact E-mail address</b> <input type="text" value="baylorcontracts@gmail.com"/>
<b>Department</b> <input type="text" value="Spiritual Life"/>	<b>Department Phone Number</b> <input type="text" value="254-710-0000"/>
<b>Department Address</b> <input type="text" value="555 W Waco Dr. Waco, TX 76657"/> 1970 characters remaining	<b>Contract Summary *</b> ⓘ <i>No Text Entered</i> <input type="button" value="Edit Summary"/>
	<b>Start Date *</b> ⓘ <input type="text" value="mm/dd/yyyy"/> <input type="checkbox"/> Update Start Date Upon Execution ⓘ
	<b>End Date *</b> ⓘ <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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4. Click **Next** to continue, or **Save Progress** to return to the draft request at a later time.



## 4. Review and Complete

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

**Review and Complete** [Print Request](#) [History](#) [?](#)

✓ Required fields complete

Section	Progress
<a href="#">Instructions</a>	✓ No Required fields
<a href="#">Details</a>	✓ No Required fields
<a href="#">Attachments</a>	✓ No Required fields
<a href="#">Questions</a>	✓ Required fields complete
<a href="#">General</a>	✓ Required fields complete
<a href="#">Risk Questionnaire</a>	✓ Required fields complete

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

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

3. 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](#)