

Total Contracts Manager (TCM) Requestor User Guide

Requestor Reference Guide to use JAGGAER Total Contract Manager

IN THIS GUIDE, LEARN HOW TO:

Log on to JAGGAER

[Section 1](#)

Access Total Contracts Manager (TCM) in JAGGAER

[Section 2](#)

Complete a Contract Request in TCM

(Step-by-Step Instructions)

[Section 3](#)

Use Additional Options for Navigating the Screens in the Contract Request

[Section 4](#)

Retrieve & Access Your Contract Request

[Section 5](#)

View the Contract File; Understand Difference between Contract *Request* & Contract *File*

[Section 6](#)

Use the Contract Request Discussion Options

[Section 7](#)

Set your JAGGAER Home Page to the Primary TCM Site (*Contracts Dashboard*)

[Section 8](#)

Search for Contracts

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PROCUREMENT NOTICE:

IF THE TOTAL VALUE OF YOUR CONTRACT REQUEST (INCLUDING RENEWALS) IS \$15K OR MORE, CONTACT THE PURCHASING OFFICE BEFORE SUBMITTING A CONTRACT REQUEST.

*If a purchase request is required, **DO NOT** submit the contract request through TCM. The Purchasing Office will submit the request on behalf of the department after they receive the purchase request and after procurement requirements are satisfied. (BCO will add the requester as a “stakeholder” so the requester can follow the process electronically.)*

1. Access JAGGAER Total Contract Manager (“TCM”). Enter your myUTSA ID and Password to log in.

Access the JAGGAER TCM site by following the link below:

<https://solutions.sciquest.com/apps/Router/SAMLAAuth/UTSA>

**Login to JAGGAER Production Environment**

myUTSA ID

Password

Login[> Forgot your password?](#)[> Need Help?](#)[> Acceptable Use Policy](#)

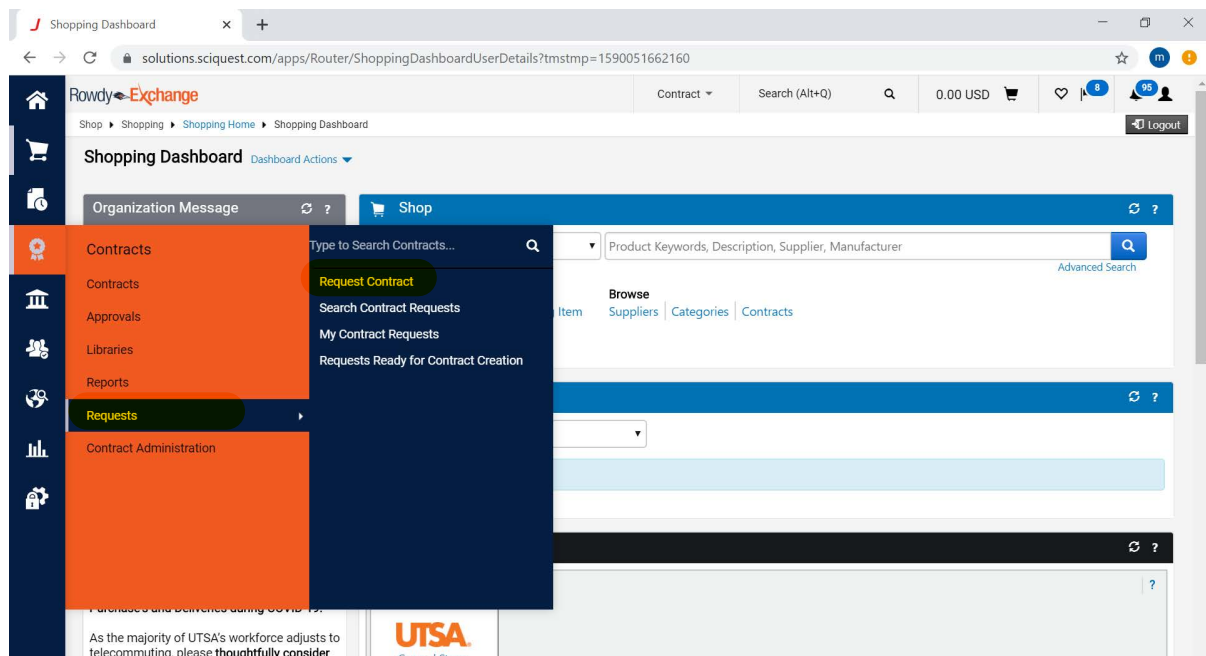
2. The TCM Module in JAGGAER (Medal/Ribbon). In addition to Total Contracts Manager (TCM), the JAGGAER system has multiple modules that can be implemented by an institution, including systems for procurement, payment, and vendor management. Each one of the icons on the left dark blue menu bar represents different modules. *The TCM module is the “Medal/Ribbon” icon.*

NOTE on option to set your home page to primary TCM page: If desired, you can set your JAGGAER Home Page to the primary TCM page as described at the end of this Guide (ref. [Section 8](#)). The Primary TCM page is called the *Contracts DASHBOARD*. Although setting your home page to the *Contracts DASHBOARD* is helpful, doing so is not required to complete a contract request.

3. Completing a Contract Request

3.1 Request a Contract. To create a Contract Request, either

- (i) click on the Medal/Ribbon icon on the left tab, then in the orange column under *Requests*, click on Request Contract.
- (ii) if you've set your home page as the Contracts Dashboard (ref. [Section 8](#)), click *Request Contract* under *Quick Links*.



3.2 Submit a Contract Request. Give the request a name and click *Submit* to begin completing the Contract Request. This particular request is named "Healthy Snacks, Inc. Vending." You cannot modify "Select Contract Request Template." Leave this alone, and hit Submit.

Create Contract Request

Contract Request Name★

Select a Contract Request Template★

TCM Electronic Request
Form V1

★ Required

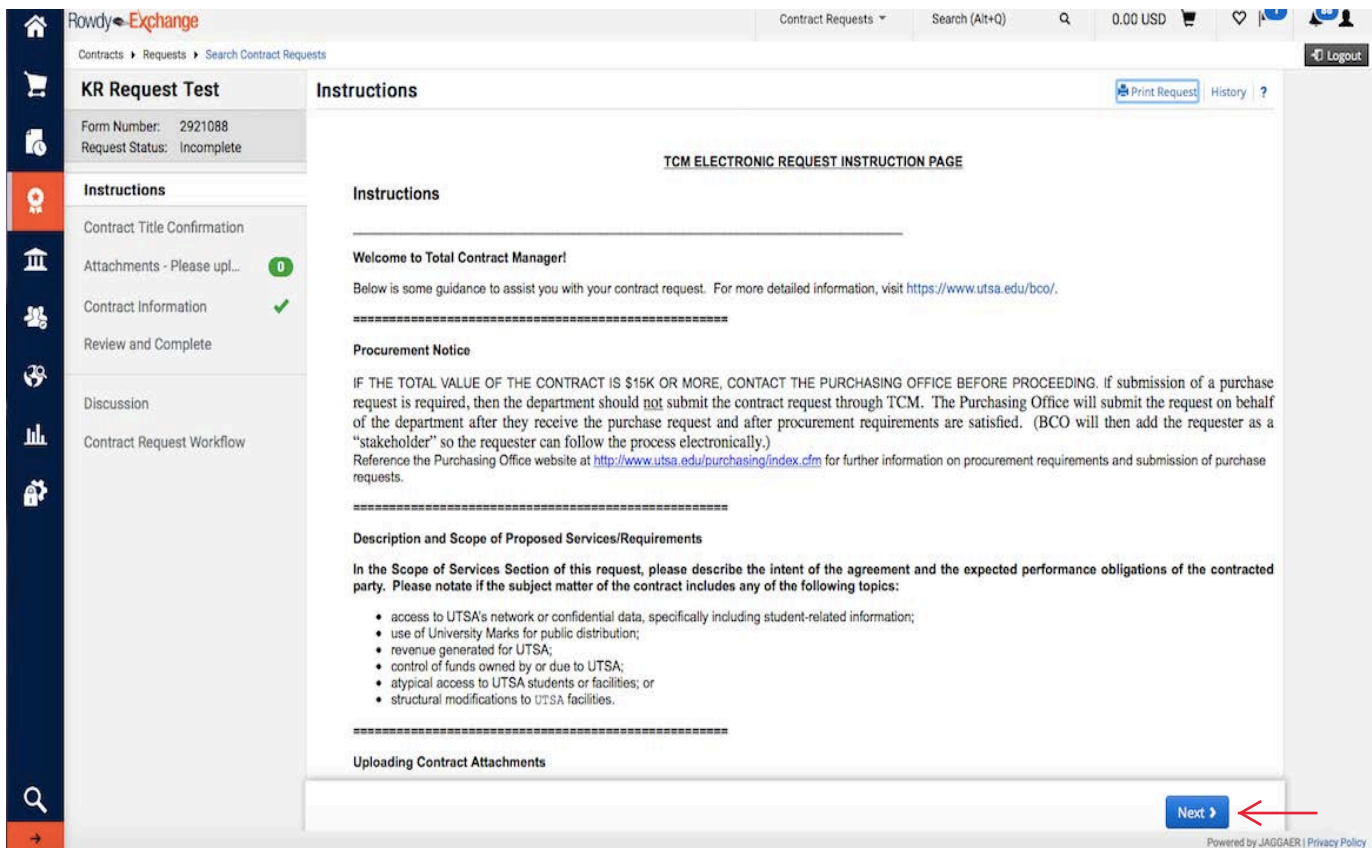
Submit

Close

3.3 Informational Instructions Page. You should now be on the *TCM Electronic Request Instructions* page (shown below). The Instructions page contains some basic information about submitting a contract request in TCM.

Click the *Next* button on the bottom of the screen to proceed.

NOTE: Additional, optional methods of moving through the request and navigating in TCM are discussed later in this Guide. (The additional navigation options are deferred to later sections to coordinate with the flow of this Guide and the Contract Request system.)



Rowdy Exchange

Contract Requests Search (Alt+Q) 0.00 USD Logout

Contracts Requests Search Contract Requests

KR Request Test

Form Number: 2921088
Request Status: Incomplete

Instructions

Contract Title Confirmation
Attachments - Please upl... 0
Contract Information ✓
Review and Complete
Discussion
Contract Request Workflow

Instructions

TCM ELECTRONIC REQUEST INSTRUCTION PAGE

Welcome to Total Contract Manager!

Below is some guidance to assist you with your contract request. For more detailed information, visit <https://www.utsa.edu/bco/>.

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Procurement Notice

IF THE TOTAL VALUE OF THE CONTRACT IS \$15K OR MORE, CONTACT THE PURCHASING OFFICE BEFORE PROCEEDING. If submission of a purchase request is required, then the department should not submit the contract request through TCM. The Purchasing Office will submit the request on behalf of the department after they receive the purchase request and after procurement requirements are satisfied. (BCO will then add the requester as a "stakeholder" so the requester can follow the process electronically.)
Reference the Purchasing Office website at <http://www.utsa.edu/purchasing/index.cfm> for further information on procurement requirements and submission of purchase requests.

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Description and Scope of Proposed Services/Requirements

In the Scope of Services Section of this request, please describe the intent of the agreement and the expected performance obligations of the contracted party. Please notate if the subject matter of the contract includes any of the following topics:

- access to UTSA's network or confidential data, specifically including student-related information;
- use of University Marks for public distribution;
- revenue generated for UTSA;
- control of funds owned by or due to UTSA;
- atypical access to UTSA students or facilities; or
- structural modifications to UTSA facilities.

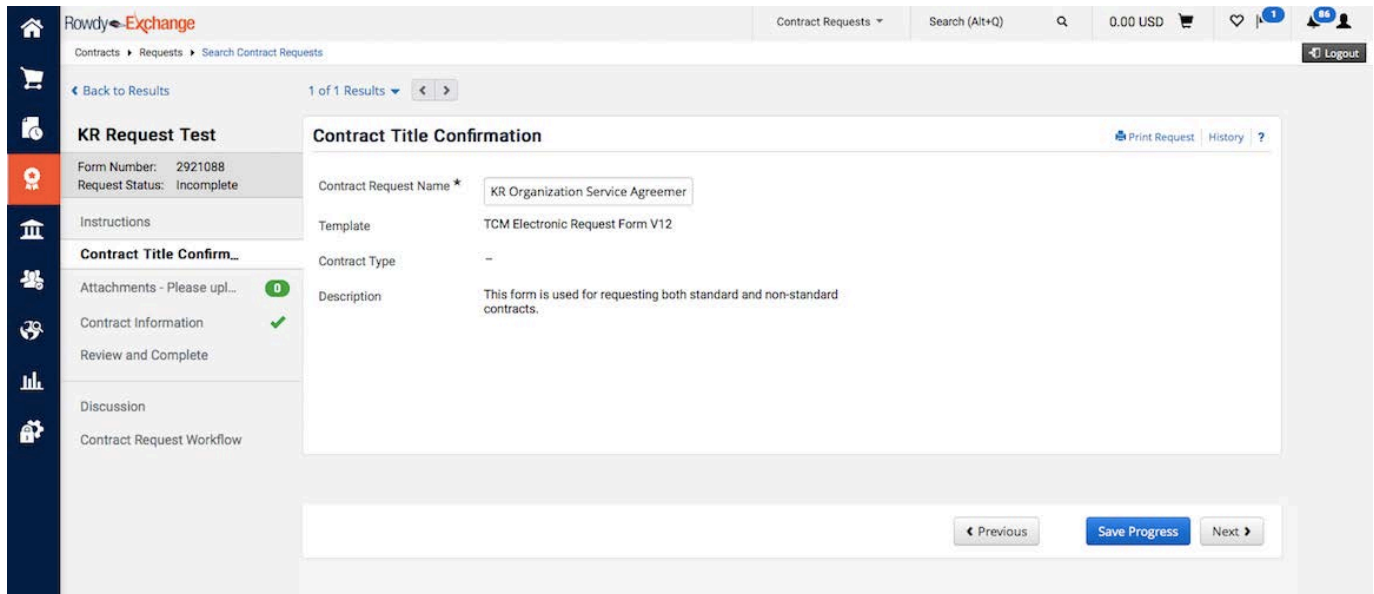
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Uploading Contract Attachments

Next →

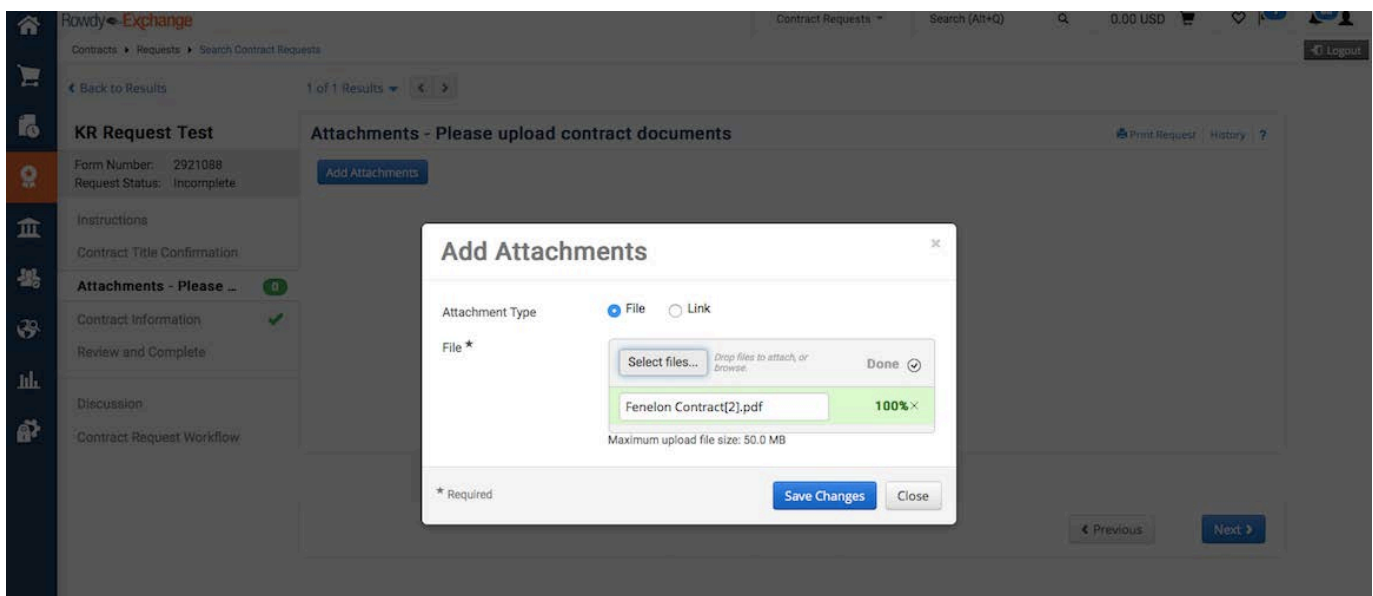
Powered by JAGGAER | Privacy Policy

3.4 Contract Title Confirmation. This screen simply gives you opportunity to adjust the name of your contract request should you wish to do so. If you do not wish to change the title, click *Next*.



The screenshot shows the 'Contract Title Confirmation' screen in the Total Contract Manager interface. The left sidebar contains a navigation menu with icons for Home, Requests, Attachments, Contract Information, Review and Complete, Discussion, and Contract Request Workflow. The main content area displays the 'Contract Title Confirmation' form. The form includes fields for 'Contract Request Name' (KR Organization Service Agreeer), 'Template' (TCM Electronic Request Form V12), 'Contract Type' (---), and 'Description' (This form is used for requesting both standard and non-standard contracts). The 'Contract Request Name' field is highlighted with a red border. The 'Add Attachments' button is visible at the bottom right of the form.

3.5 Attachments Screen. This screen allows you to attach the proposed contract to the request, and any email approvals, preliminary forms, , or other documentation that should be submitted to the Business Contracts Office (BCO) for completion of the contract. Simply click *Add Attachments*, then select files to upload and click *Save Changes*. Please upload the contract and any supporting documentation as separate attachments. Click *Next*.



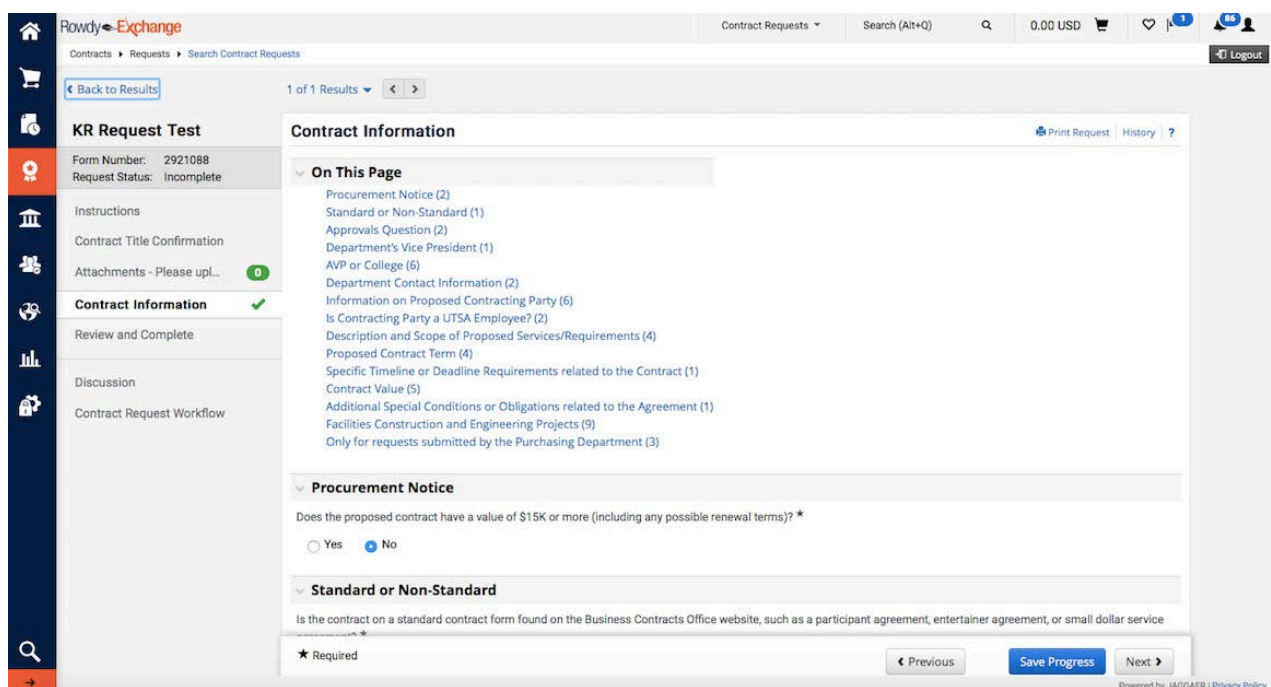
The screenshot shows the 'Add Attachments' screen in the Total Contract Manager interface. The left sidebar contains a navigation menu with icons for Home, Requests, Attachments, Contract Information, Review and Complete, Discussion, and Contract Request Workflow. The main content area displays the 'Add Attachments' form. The form includes a section for 'Attachment Type' with radio buttons for 'File' (selected) and 'Link'. Below this is a 'File' section with a 'Select files...' button and a 'Drop files to attach, or browse.' area. A file named 'Fenelon Contract[2].pdf' is shown with a '100%' progress bar. The 'Maximum upload file size: 50.0 MB' is displayed at the bottom. The 'Save Changes' button is visible at the bottom right of the form.

3.6 Contract Information Screen. The Contract Information page contains questions that must be answered to complete the contract request. Required questions are indicated with a star. Depending on your answer to certain questions, additional fields may pop up that need to be completed.

The Questions are detailed below with an explanation under each screen shot.

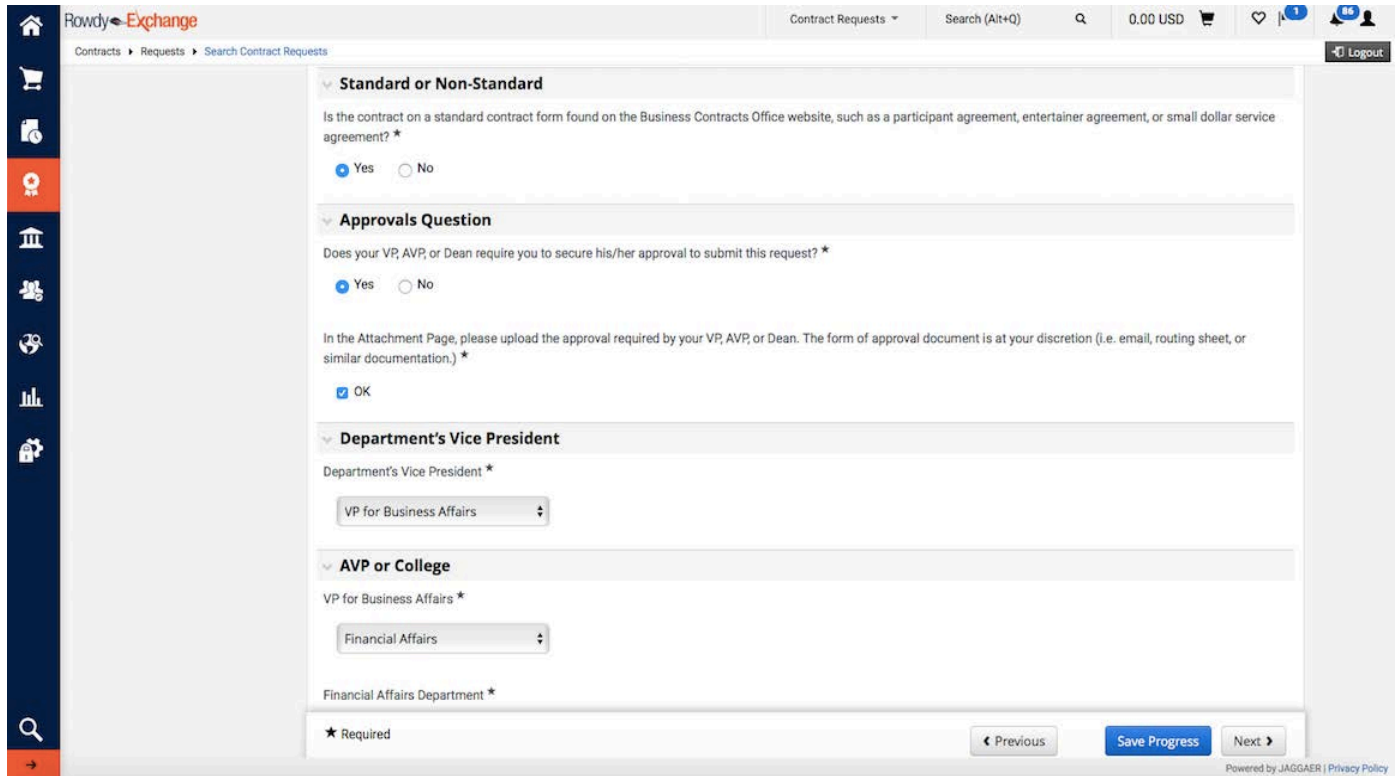
Tip: Click on the ‘?’ beside various fields for Help Information.

Note: At any point in time you can scroll to the bottom of the page and click **“Save Progress”** to save your information. You exit the system by logging out or closing the browser window. When you login again your saved information will be available under **“My Requests.”** The **My Requests** fields and related options are discussed in Section 5.



3.6.1 Procurement Notice – If the total amount of your contract (including any possible renewals) exceeds \$15,000.00, select Yes.

If you selected Yes, contact the Purchasing Office. If a purchase request is required, then the department should not submit the contract request through TCM. See the Procurement Notice at the beginning of this Guide.



Rowdy Exchange

Contract Requests Search (Alt+Q) 0.00 USD Logout

Contracts Requests Search Contract Requests

Standard or Non-Standard

Is the contract on a standard contract form found on the Business Contracts Office website, such as a participant agreement, entertainer agreement, or small dollar service agreement? *

☒ Yes ☐ No

Approvals Question

Does your VP, AVP, or Dean require you to secure his/her approval to submit this request? *

☒ Yes ☐ No

In the Attachment Page, please upload the approval required by your VP, AVP, or Dean. The form of approval document is at your discretion (i.e. email, routing sheet, or similar documentation.) *

☒ OK

Department's Vice President

Department's Vice President *

VP for Business Affairs

AVP or College

VP for Business Affairs *

Financial Affairs

Financial Affairs Department *

★ Required

Previous Save Progress Next

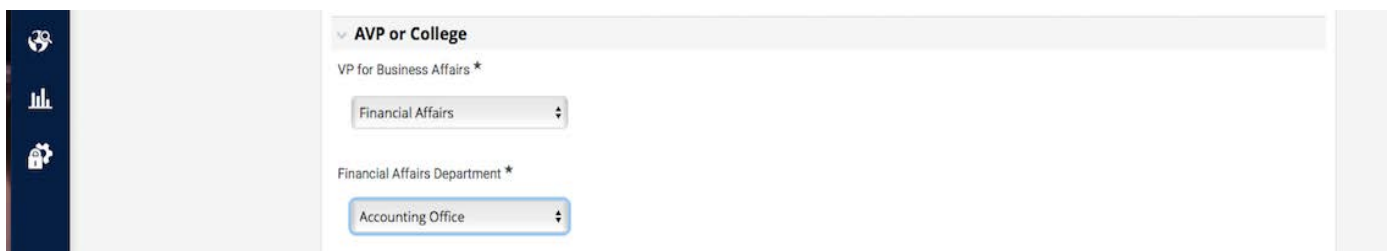
Powered by JAGGAER | Privacy Policy

3.6.2 **Standard or Non-Standard** – Select Yes only if you are using a standard form off of the Business Contracts Website at <https://www.utsa.edu/bco/>.

3.6.3 **Approvals** – Upload approval from the budgetary authority, and any other approvals required by your AVP or Dean. These approvals can be in any format that is convenient, such as emails, an electronic deans approval, or some other form of documentation.

3.6.4 **Department's Vice President** – Click the dropdown and select the appropriate Vice President. Based on this selection the choices available in the **AVP or College** field will change.

3.6.5 **AVP or College** – Click the dropdown and select the appropriate AVP or College. *This selection may generate an additional Department field that requires completion.* Select the appropriate Department (if available). *See the image below*



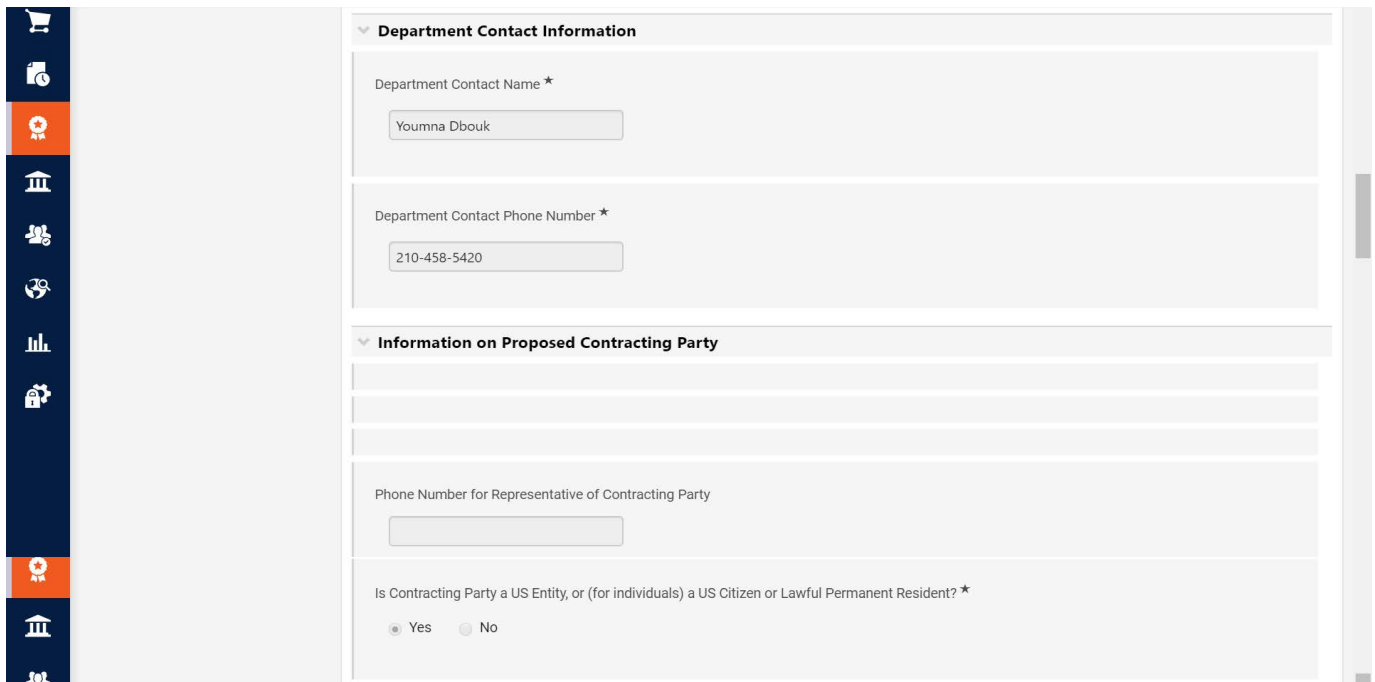
AVP or College

VP for Business Affairs *

Financial Affairs

Financial Affairs Department *

Accounting Office



Department Contact Information

Department Contact Name *

Younna Dbouk

Department Contact Phone Number *

210-458-5420

Information on Proposed Contracting Party

Phone Number for Representative of Contracting Party

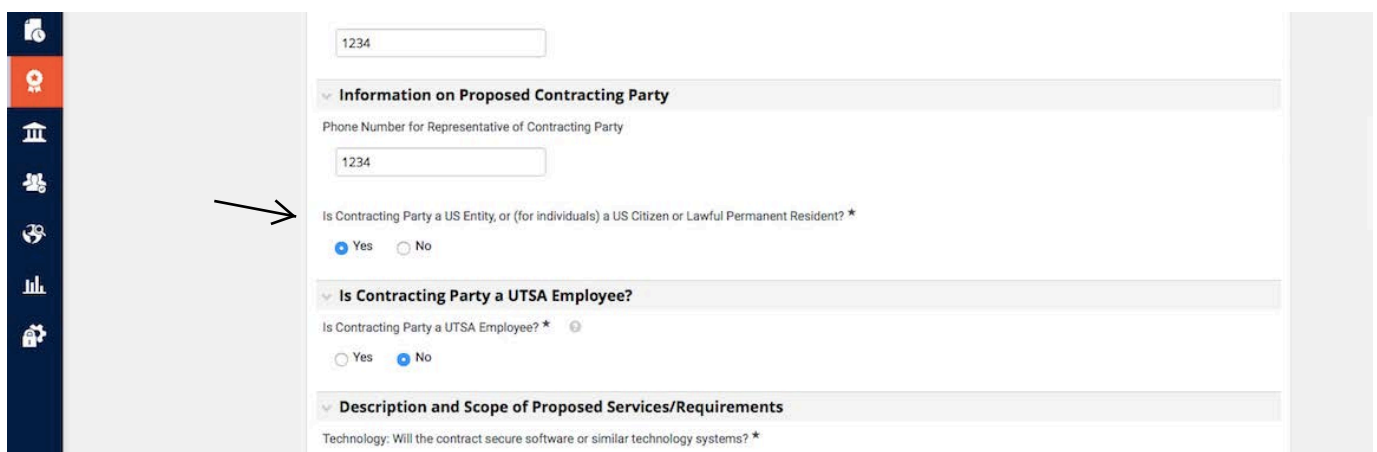
Is Contracting Party a US Entity, or (for individuals) a US Citizen or Lawful Permanent Resident? *

☒ Yes ☐ No

3.6.6 Department Contact Information – Enter the information for the person in the department responsible for this contract. Including their phone number or extension under *Department Contact Phone Number*.

3.6.7 Information on Proposed Contracting Party – Enter the information of the appropriate individual that is representing the contracting party.

3.6.8 US Entity Question – Select Yes or No. The selection of “No” will trigger electronic routing to the Office of International Programs and the Office Research Integrity as required by UTSA policy. The selection of “No” will also generate instructions on the screen about securing the required approvals from OIP and ORI. The “Instructions” page of the Contract Request also provide information about securing OIP and ORI approvals for non-US entities.



1234

Information on Proposed Contracting Party

Phone Number for Representative of Contracting Party

1234

Is Contracting Party a US Entity, or (for individuals) a US Citizen or Lawful Permanent Resident? *

☒ Yes ☐ No

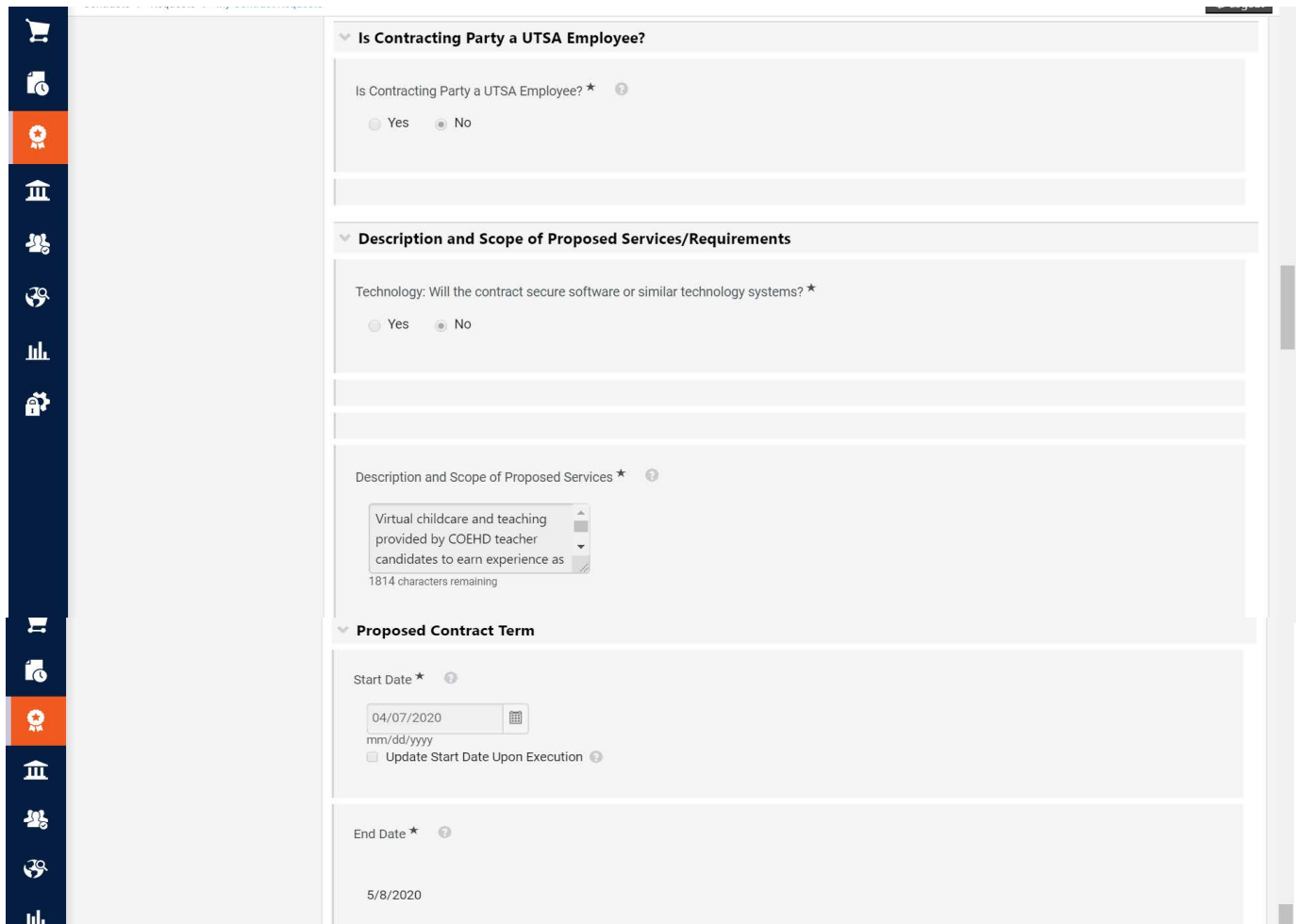
Is Contracting Party a UTSA Employee?

Is Contracting Party a UTSA Employee? *

☐ Yes ☒ No

Description and Scope of Proposed Services/Requirements

Technology: Will the contract secure software or similar technology systems? *



Is Contracting Party a UTSA Employee?

Is Contracting Party a UTSA Employee? ★ ⓘ

☐ Yes ☒ No

Description and Scope of Proposed Services/Requirements

Technology: Will the contract secure software or similar technology systems? ★

☐ Yes ☒ No

Description and Scope of Proposed Services ★ ⓘ

Virtual childcare and teaching provided by COEHD teacher candidates to earn experience as

1814 characters remaining

Proposed Contract Term

Start Date ★ ⓘ

04/07/2020 ⓘ

mm/dd/yyyy

☐ Update Start Date Upon Execution ⓘ

End Date ★ ⓘ

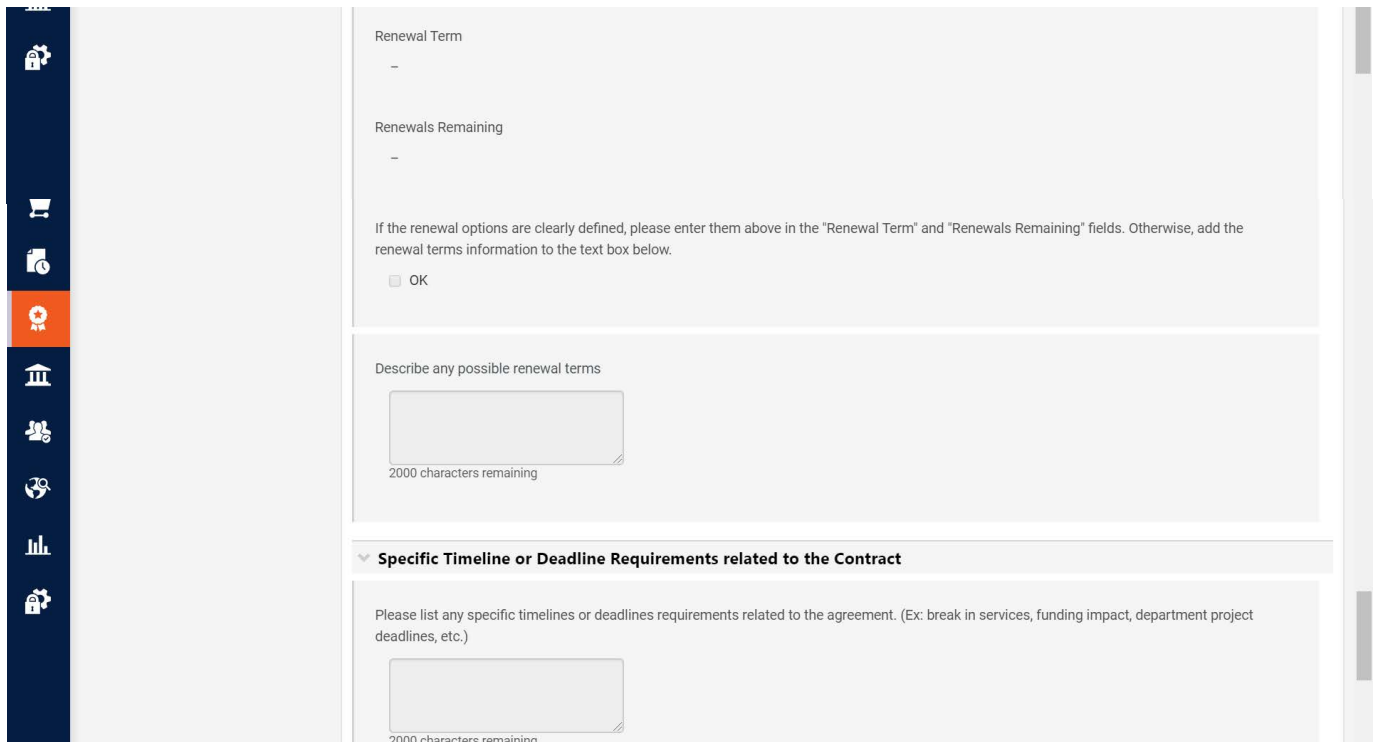
5/8/2020

3.6.9 UTSA Employee - Is the contracting party a UTSA employee? Check yes or no. If yes, you will need to contact the business contracts office before proceeding and then check off “ok.”

3.6.10 Description and Scope of Proposed Services/Requirements – Enter a detailed description, particularly for non-standard contracts generated by a vendor/contractor. For information about what to include in this field, click the question mark next to the star, and help text will appear.

3.6.11 Propsed Contract Term – Enter the anticipated start date for the contract, then select *Expires On*. Another date field will appear to enter the anticipated end date of the contract. Enter the expected end date.

Note: If the Contract has possibilities for renewal terms (ref. below), then the expected end date should be the end of the initial term. Renewal terms are addressed below.



Renewal Term
-

Renewals Remaining
-

If the renewal options are clearly defined, please enter them above in the "Renewal Term" and "Renewals Remaining" fields. Otherwise, add the renewal terms information to the text box below.

☐ OK

Describe any possible renewal terms

2000 characters remaining

▼ **Specific Timeline or Deadline Requirements related to the Contract**

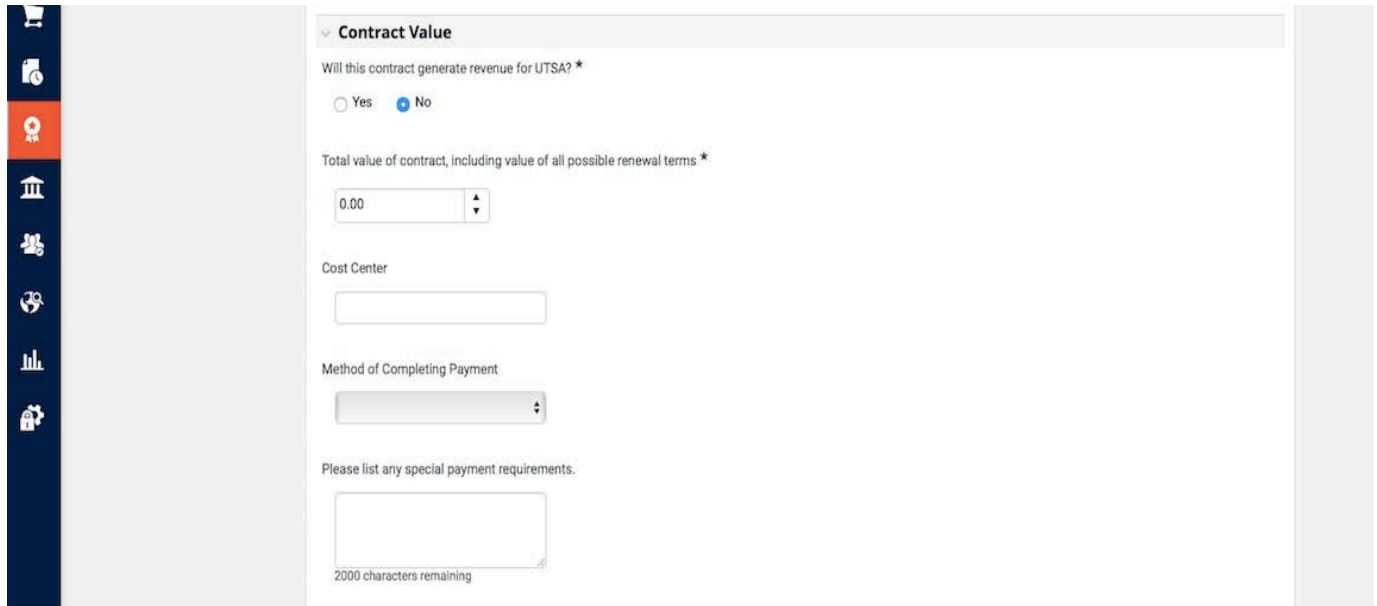
Please list any specific timelines or deadlines requirements related to the agreement. (Ex: break in services, funding impact, department project deadlines, etc.)

2000 characters remaining

3.6.11 Renewals – If the contract has possible renewal terms, the system provides the following two ways to describe the renewal options.

- **Renewal Term and Renewals Remaining.** Use these fields if the possible renewals are straightforward. For example, if you have a contract with a single one-year option to renew, then enter the *Renewal Term* as "1" "Years" and the *Renewals Remaining* as "1".
- **Free Form Text Box to Describe Renewals.** If the possible renewal terms are not clearly defined, use the free form box to explain the possibilities. You can also use this box to explain any additional renewal conditions that need to be included. For example, "contract requires 60-day notice for renewal."

3.6.12 Specific Timeline or Deadline Requirements related to the Contract – Use this field to enter any additional information you need to provide regarding unusual timelines or deadlines for this contract.

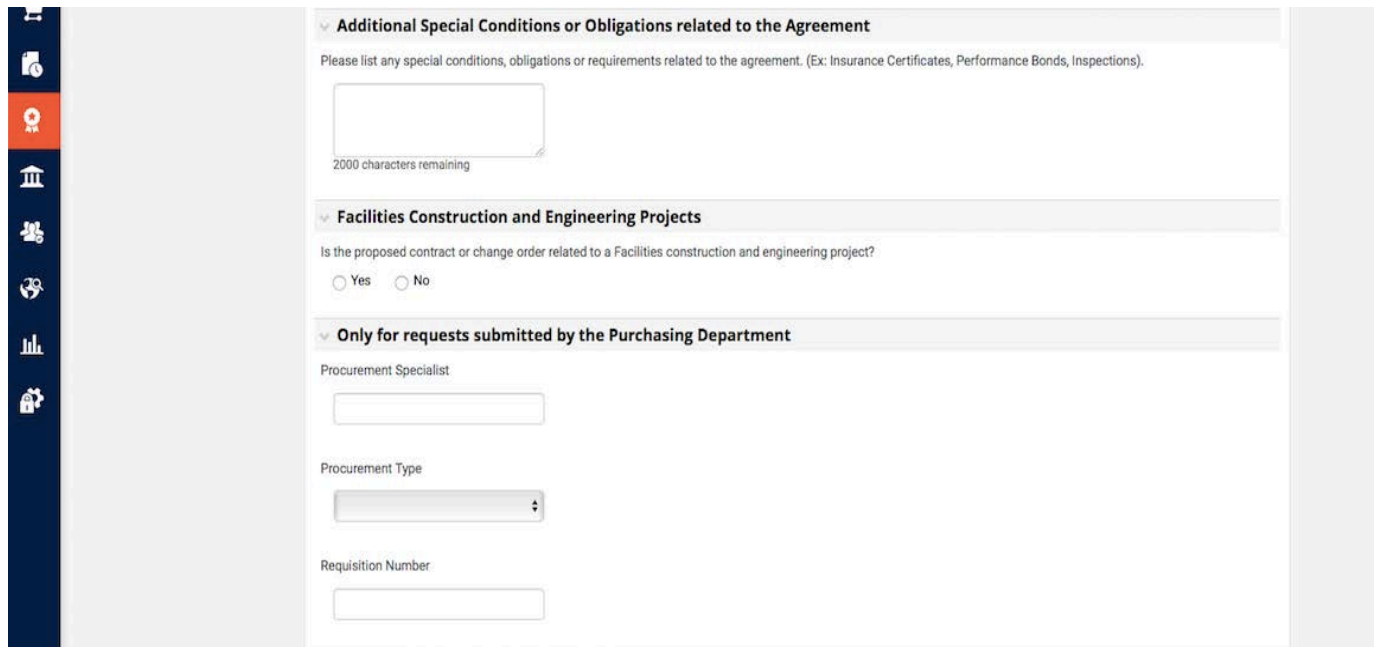


3.6.13 Contract Value –

- **Will Contract Generate Revenue?** Select *Yes* if this contract will directly result in revenue for UTSA, such as a contract in which UTSA provides services for payment, or a contract in which UTSA receives royalties.
- **Total Value.** Enter the total value of the contract including all possible renewals.

3.6.1 Cost Center and Method of Completing Payment – Although these are optional fields, including this information could be helpful (depending on the nature of the contract) for the department’s tracking and documentation purposes. See below for information related to “managing my requests.”

Special Payment Requirements – Use this field to enter any special payment requests, such as deposit requirements, or pre-payments. Note that deposits and pre-payment generally require approval by Disbursements.



Additional Special Conditions or Obligations related to the Agreement

Please list any special conditions, obligations or requirements related to the agreement. (Ex: Insurance Certificates, Performance Bonds, Inspections).

2000 characters remaining

Facilities Construction and Engineering Projects

Is the proposed contract or change order related to a Facilities construction and engineering project?

☐ Yes ☐ No

Only for requests submitted by the Purchasing Department

Procurement Specialist

Procurement Type

Requisition Number

3.6.14 Additional Special Conditions or Obligations related to the Agreement – List any other special conditions that may pertain to this contract.

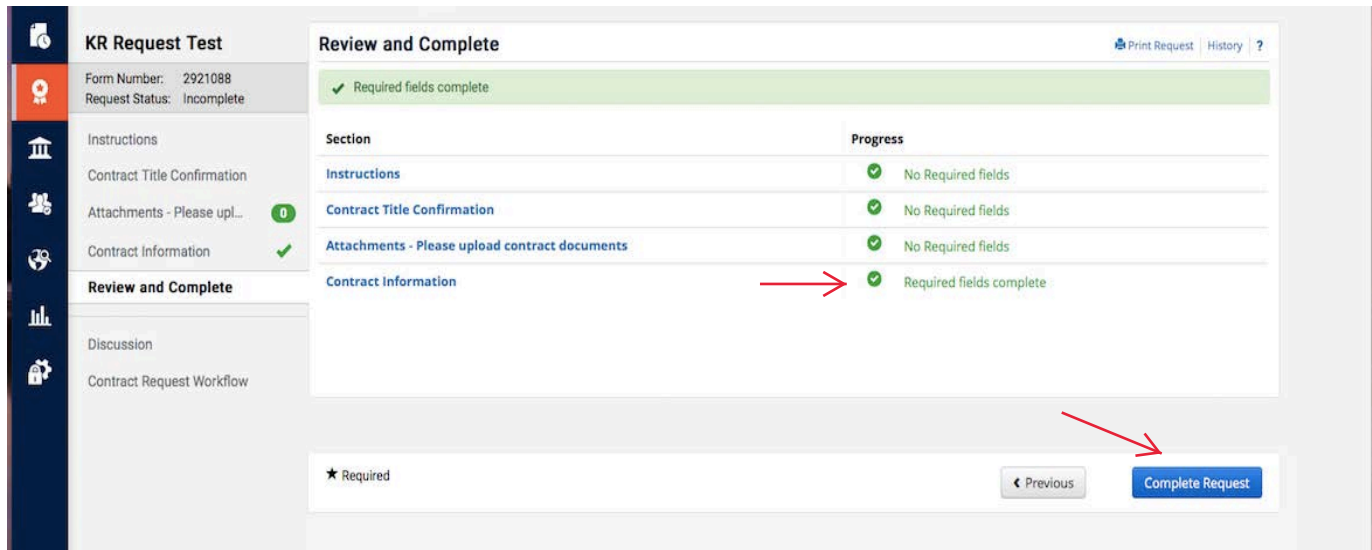
3.6.15 Non Applicable Fields – *Leave the following fields blank:*

- **Facilities Construction and Engineering Projects** – Leave these fields blank. These fields pertain only to Facilities' Engineering and Project Management.
- **Purchasing and Distribution Services Department Use Only** – Leave these fields blank.

3.7 Proceed to Review and Complete Page – Once all required fields have been completed. click the **Next** button to go to the *Review and Complete* page (if you are ready to submit).

Note on option to submit comments: TCM also has an option to submit comments through the *Discussions* page, which is described in Section 7. (The Discussion page is deferred to a later section to coordinate with the flow of this Guide and the Contract Request system.)

3.8 Review and Complete Page. 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*. If any of the Required Fields (Questions with a star beside them) are not completed, the page will be shown as grey and say *Incomplete*.



Section	Progress
Instructions	✓ No Required fields
Contract Title Confirmation	✓ No Required fields
Attachments - Please upload contract documents	✓ No Required fields
Contract Information	✓ Required fields complete

★ Required

Previous Complete Request

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

4. Additional Options for Navigating the Screens in the Contract Request. As detailed above, completing the Contract Request requires moving through a few required screen pages. These screen pages are listed on the left side of the screen and are labeled:

- (i) *Instructions* (your current page shown below),
- (ii) *Contract Title Confirmation*,
- (iii) *Attachments*, and
- (iv) *Contract Information*.

The TCM Contract Request system also contains an optional screen (*Discussion*) & a Workflow screen (*Contract Request Workflow*), both of which are discussed in detail in this Guide.

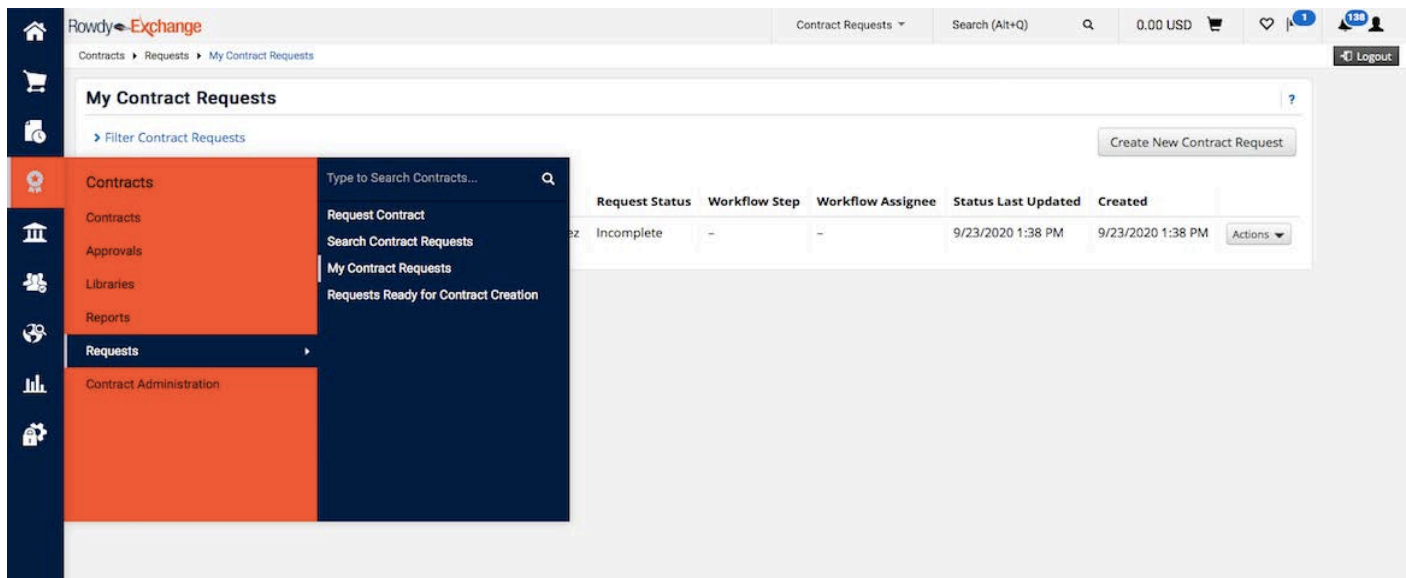
In addition to using the *Next* button as described above, you can also go directly to a specific screen of the Contract Request (i.e. *Contract Title Confirmation*, *Attachments*, *Contract Information*, *Review and Complete*, etc.) by clicking on any of the titles on the left side of the page. Remember that you can save changes by clicking the *Save Progress* button at the bottom of the screen.

5. Retrieving & Accessing Your Contract Request. Once you exit and come back into TCM, You can search and follow the status of your requests in multiple ways. Two different methods of accessing your Contracts Request are described below. Accessing the *Contract File* and *Contract Number* are described in [Section 6](#).

5.1 From the Contract Requests Dashboard. If you have your Contracts Requests Dashboard set up (ref. [Section 8](#)), click on *My Contract Requests* in the Quick Links menu shown in the first screen shot below. A list of your Contract Requests will be displayed.

- **Possible Need to “Filter” Contract Requests:** All the contract requests you created will be available under *My Contract Requests*. However, you may need to click on *Filter Contract Requests* and select *Approved* and/or *Completed*, then click the *Apply* button as shown in the second screen shot on this page.

A Completed Contract Request means BCO has Created a Contract File. A Completed Request does not equal an executed contract. See [Section 6](#).



Rowdy Exchange

Contract Requests

Search (Alt+Q)

0.00 USD

Logout

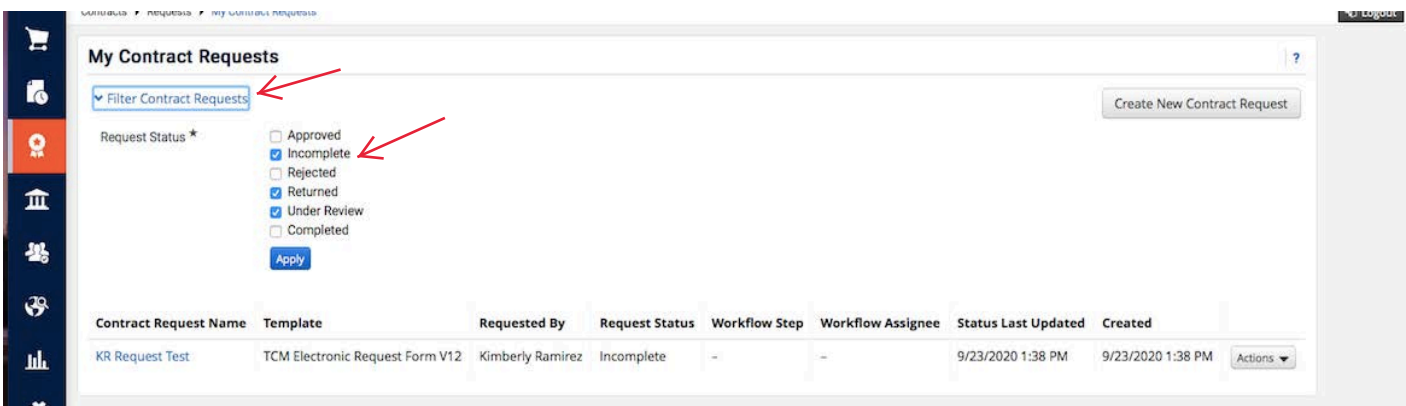
Contracts > Requests > My Contract Requests

My Contract Requests

Filter Contract Requests

Create New Contract Request

Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
Incomplete	-	-	9/23/2020 1:38 PM	9/23/2020 1:38 PM	Actions



My Contract Requests

Filter Contract Requests

Create New Contract Request

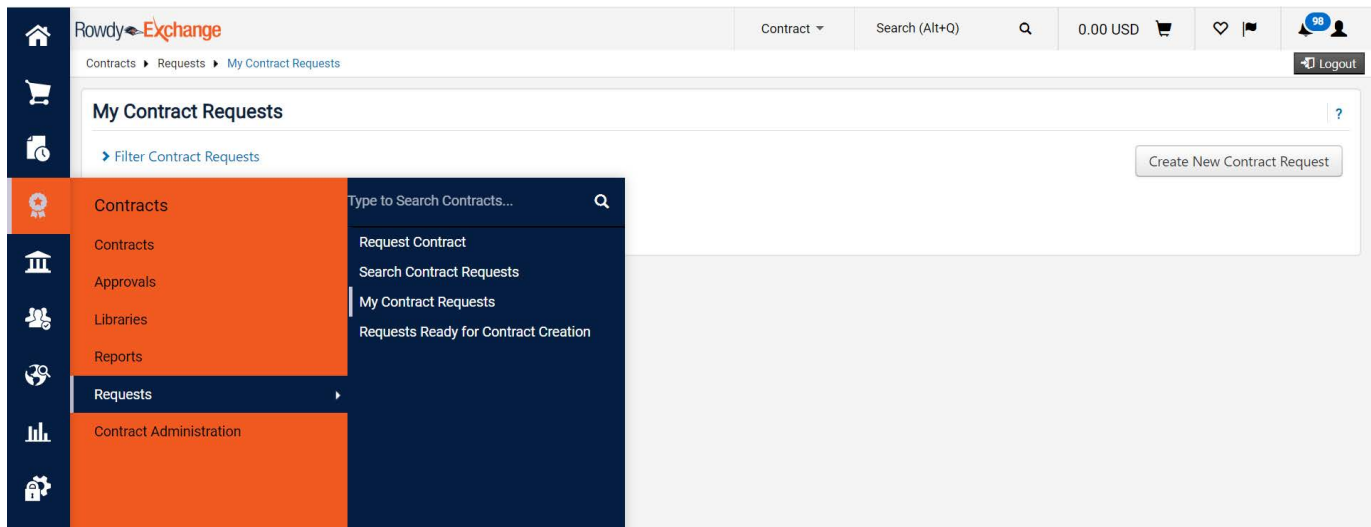
Request Status *

- ☐ Approved
- ☒ Incomplete
- ☐ Rejected
- ☒ Returned
- ☒ Under Review
- ☐ Completed

Apply

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
KR Request Test	TCM Electronic Request Form V12	Kimberly Ramirez	Incomplete	-	-	9/23/2020 1:38 PM	9/23/2020 1:38 PM	Actions

5.2 Search under **My Contract Requests** using the **TCM Icon**. Hover over the TCM icon (Medal/Ribbon) and search under *My Contract Requests*. A list of your Contract Requests will be displayed. Accessing the *Contract File* and *Contract Number* are described in [Section 6](#).



“Filtering Contract Requests: As mentioned, you may need to click on *Filter Contract Requests* and select *Approved* and/or *Completed* then click the *Apply* button to see those contract requests that have been reviewed by BCO. See Screen Shots on previous page.

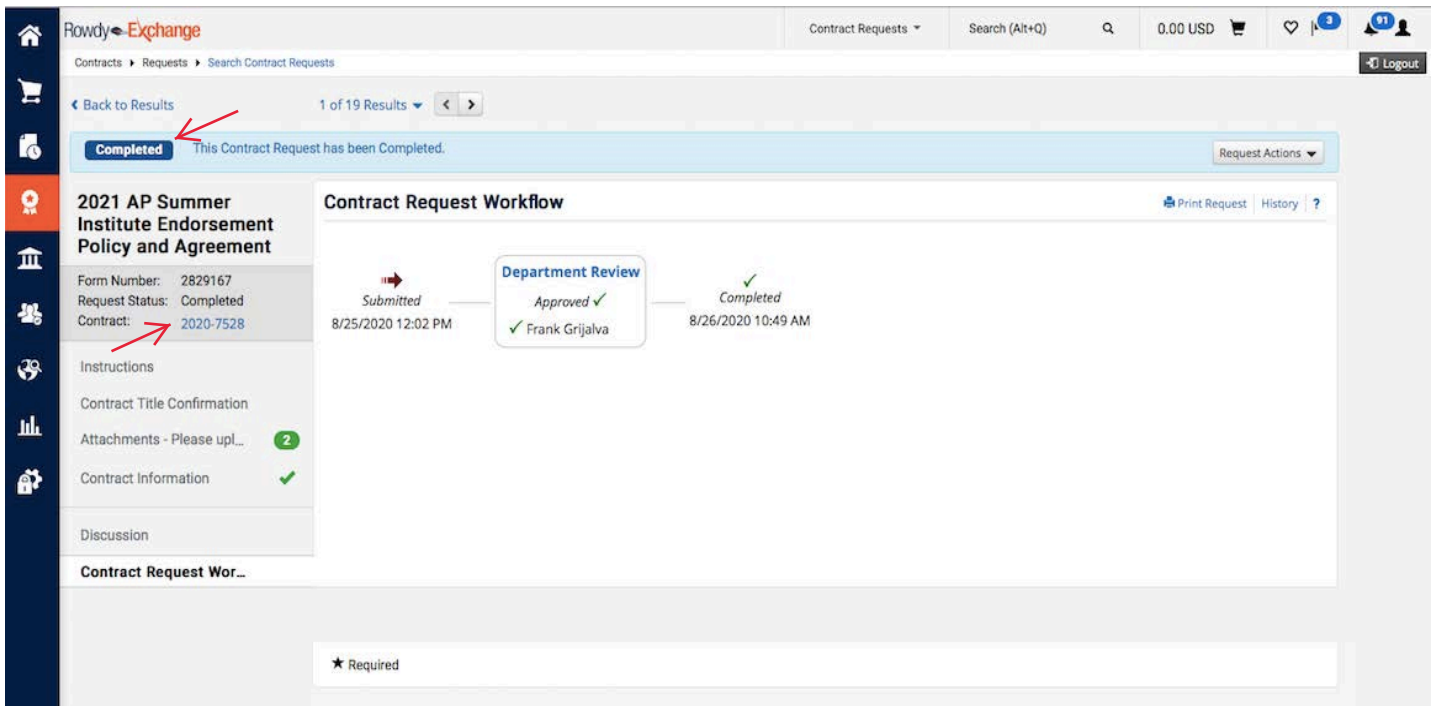
Completed Contract Request means BCO has Created a Contract File to be Worked. A Completed Request does not equal an executed contract. See [Section 6](#).

6. Viewing the Contract File; Difference between Contract Request & Contract File

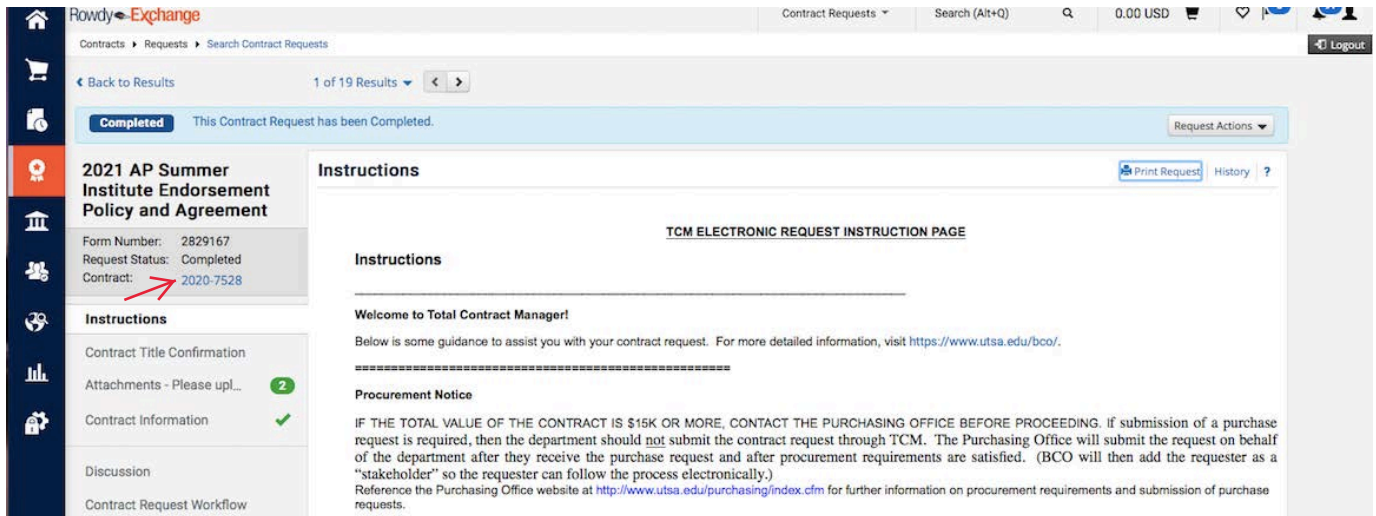
6.1 Contract Request “flipped” into Contract file. BCO will review your request and “flip it” into a Contract File. Once BCO flips your request into a Contract File, your request will show “Completed” as displayed in the Screen Shots on this page and the following page. This means BCO has taken action on your request and created a file to begin completing the contract.

6.2 Securing a Contract Number and Viewing Contract File. Once BCO “flips” your request into an actual contract file, a contract number will be created. The contract number will be shown in your request on the left side of the screen, under your Request Title. Click on the contract number to get to the actual contract file. In the contract file, you can see additional information (some of which is added by BCO) and monitor your contract.

A “Completed” Contract Request means BCO has Created a Contract File to be Worked. A Completed Request does not equal an executed contract.



The screenshot displays the 'Rowdy Exchange' interface for a 'Contract Request Workflow'. The status is 'Completed', indicated by a blue banner at the top. The workflow steps are: Submitted (8/25/2020 12:02 PM), Department Review (Approved by Frank Grijalva), and Completed (8/26/2020 10:49 AM). The left sidebar shows the request details for '2021 AP Summer Institute Endorsement Policy and Agreement' with form number 2829167 and contract number 2020-7528. The top navigation bar includes 'Contract Requests', 'Search (Alt+Q)', and '0.00 USD'.



Rowdy Exchange

Contract Requests Search (Alt+Q) 0.00 USD Logout

Contracts Requests Search Contract Requests

Back to Results 1 of 19 Results

Completed This Contract Request has been Completed. Request Actions

2021 AP Summer Institute Endorsement Policy and Agreement

Form Number: 2829167
Request Status: Completed
Contract: 2020-7528

Instructions

Contract Title Confirmation
Attachments - Please upl... 2
Contract Information ✓
Discussion
Contract Request Workflow

Instructions

TCM ELECTRONIC REQUEST INSTRUCTION PAGE

Instructions

Welcome to Total Contract Manager!

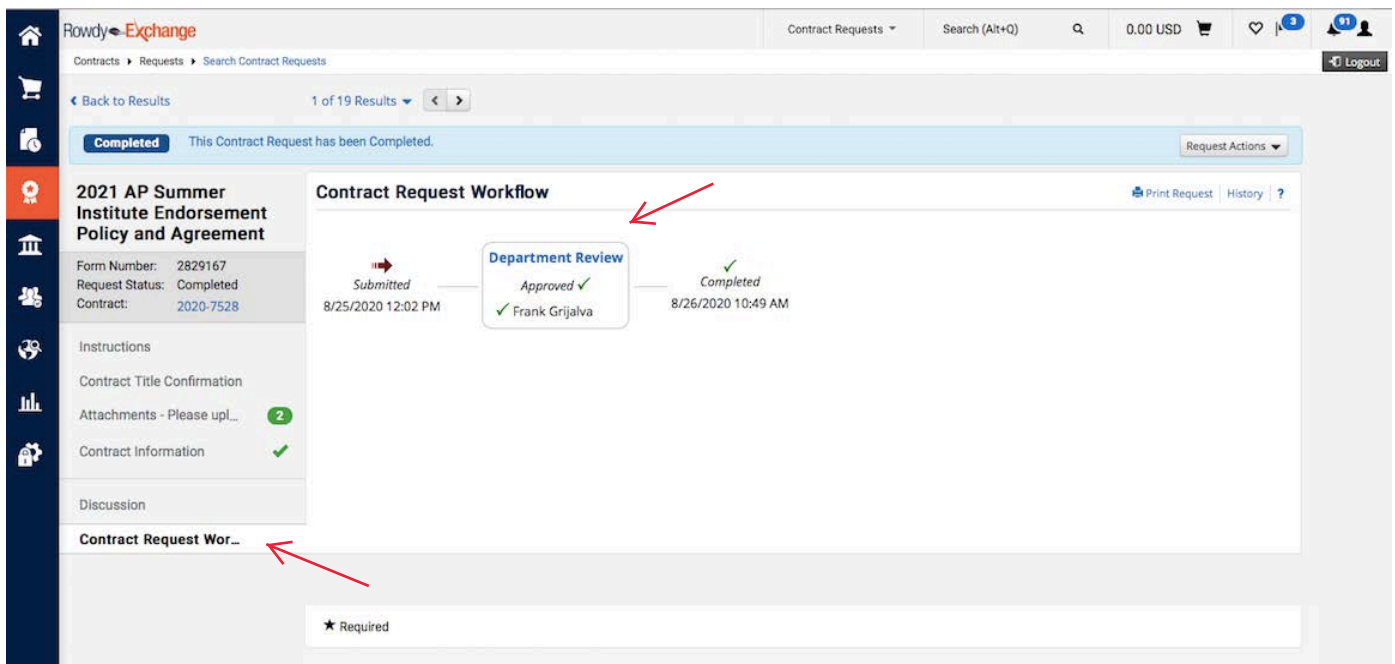
Below is some guidance to assist you with your contract request. For more detailed information, visit <https://www.utsa.edu/bco/>.

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Reference the Purchasing Office website at <http://www.utsa.edu/purchasing/index.cfm> for further information on procurement requirements and submission of purchase requests.

6.3 Timeline for BCO to Flip Request into a Contract File. "Flipping the contract request and creating the Contract File should occur within 1-2 business days after receipt of the request by BCO. You can monitor the review process for your Contract Request by clicking on the *Contract Request Workflow* tab as shown in the Screen Shot below.



Rowdy Exchange

Contract Requests Search (Alt+Q) 0.00 USD Logout

Contracts Requests Search Contract Requests

Back to Results 1 of 19 Results

Completed This Contract Request has been Completed. Request Actions

2021 AP Summer Institute Endorsement Policy and Agreement

Form Number: 2829167
Request Status: Completed
Contract: 2020-7528

Contract Request Workflow

Submitted 8/25/2020 12:02 PM

Department Review

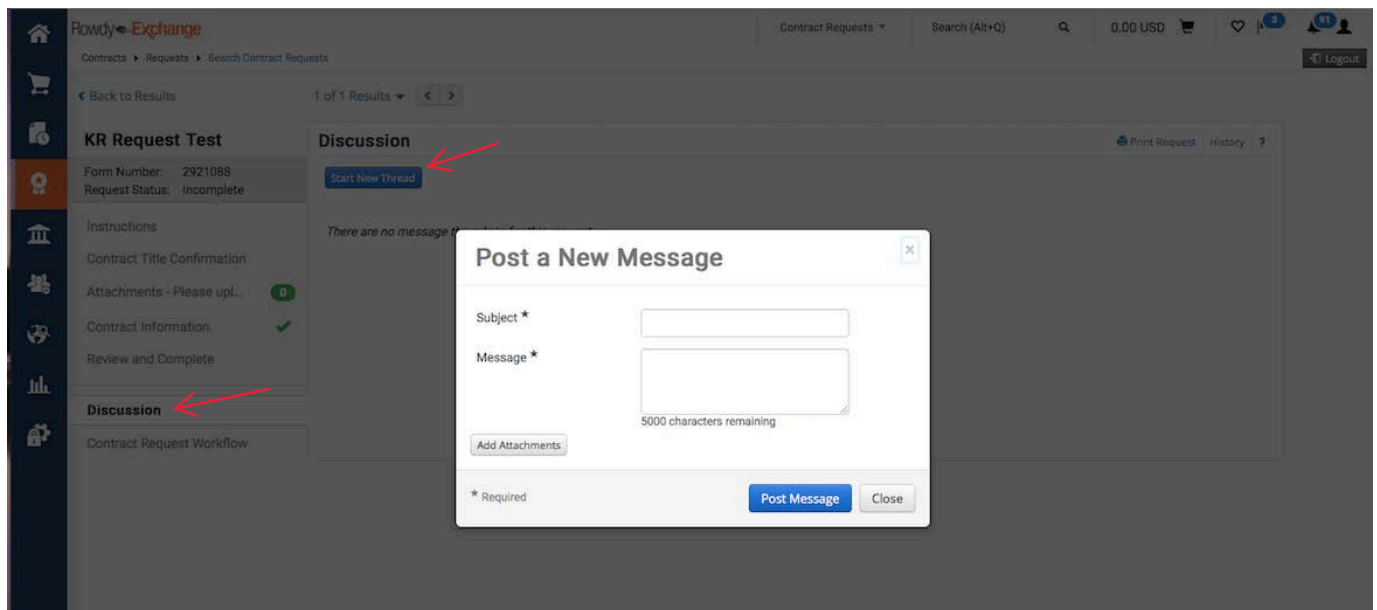
Approved ✓
✓ Frank Grijalva

Completed 8/26/2020 10:49 AM

Instructions
Contract Title Confirmation
Attachments - Please upl... 2
Contract Information ✓
Discussion
Contract Request Wor...

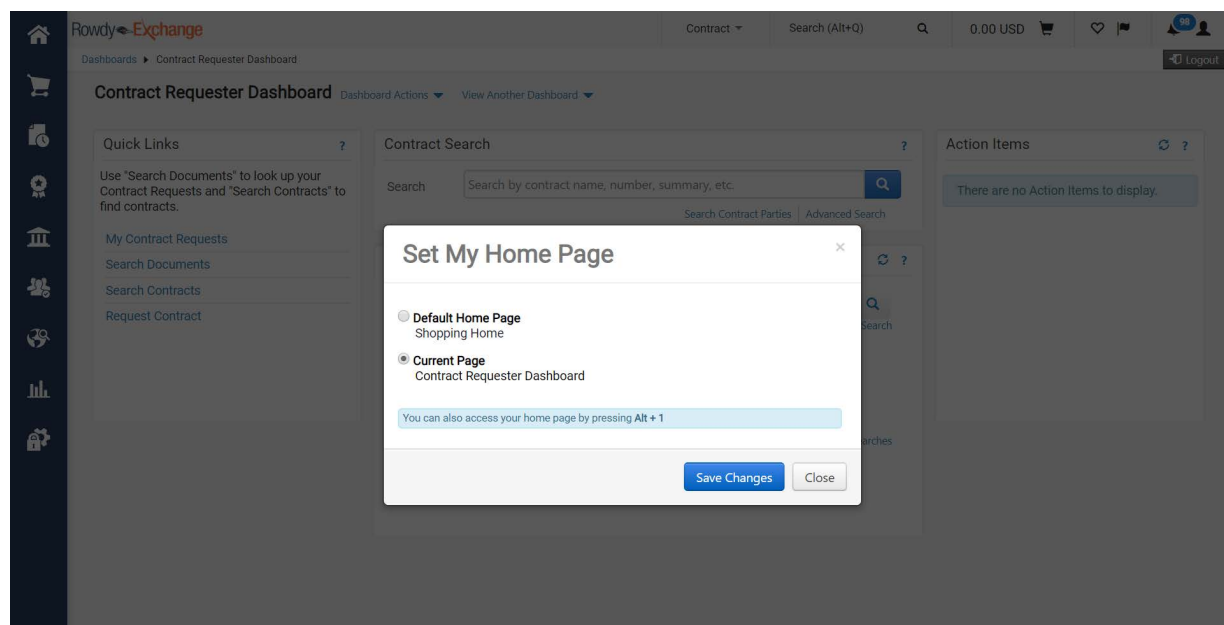
★ Required

7. Contract Request Discussions Page. The Discussions page in the Contracts Request provides the option to submit comments along with the request. If you would like to add any additional comments for BCO, click on the *Discussions* page on the left hand menu. Then select *Start New Thread* and include a subject and message.



8. Setting your JAGGAER Home Page to the Primary TCM Site (Contracts Dashboard). The TCM Contract Dashboard site is the primary TCM home page. To change your JAGGAER home page to the Contract Dashboard, click on the your profile icon and select *Dashboards*. Then click "view other dashboards" and then click "Contract Requester Dashboard"

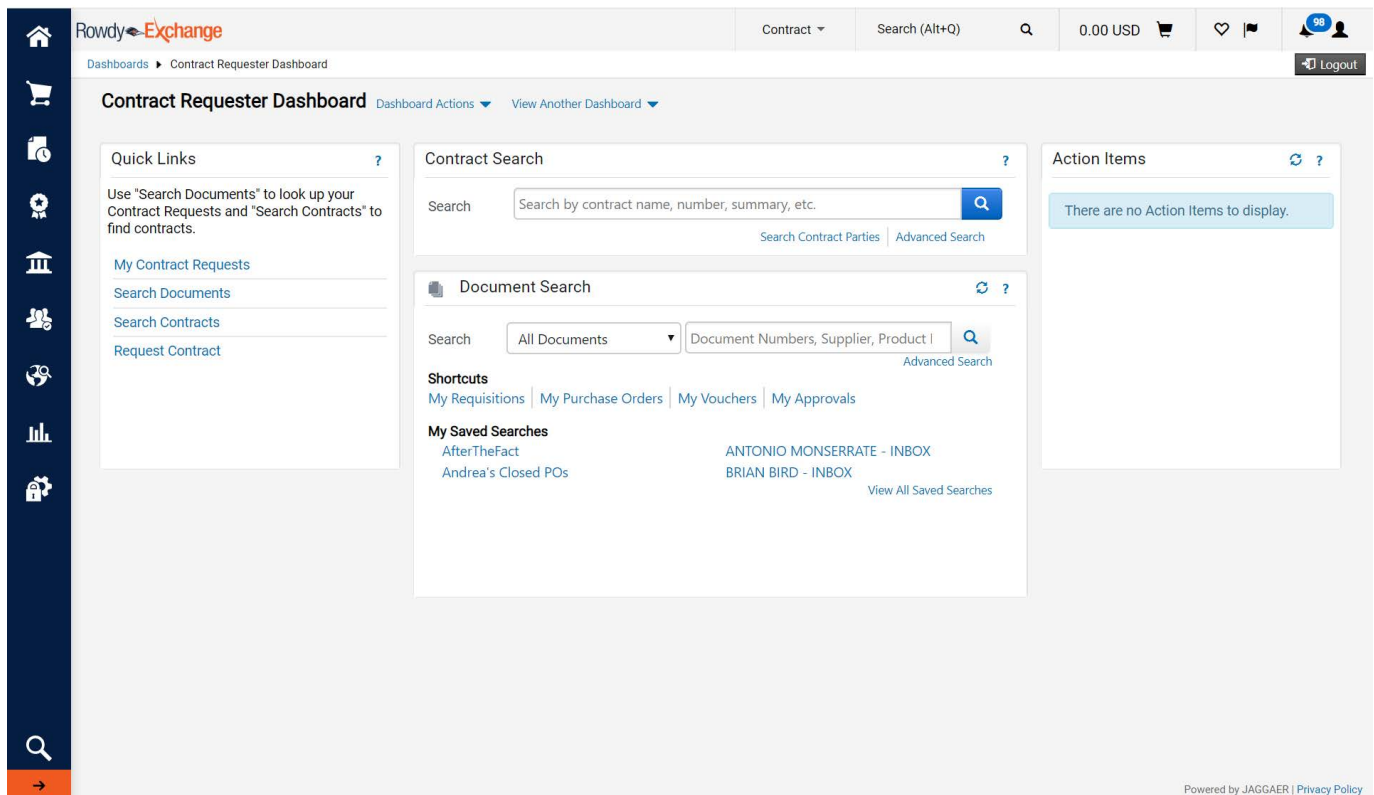
Click on your profile icon again and click *Set My Home Page*. Set the Approver Dashboard as your Home Page and click *Save*. Anytime you wish to return to the Home Page, select house icon on the top left side of the screen.



FYI NOTE: The Screen Shot above (previous page) shows a Dashboard that will not display on the screen (Business Contracts Dashboard).

Contract Requester Dashboard.

From the Dashboard, you can search for Contracts that have been created from the Contract Requests you've submitted. You will see Action Items displayed. In the Quick Links section you can click on a Quick Link to go directly to a specific task.



The screenshot displays the 'Contract Requester Dashboard' within the 'Rowdy Exchange' application. The interface includes a top navigation bar with a 'Contract' dropdown, a search bar (labeled 'Search (Alt+Q)'), a currency display of '0.00 USD', and a 'Logout' button. A left sidebar contains various navigation icons. The main content area is divided into several sections:

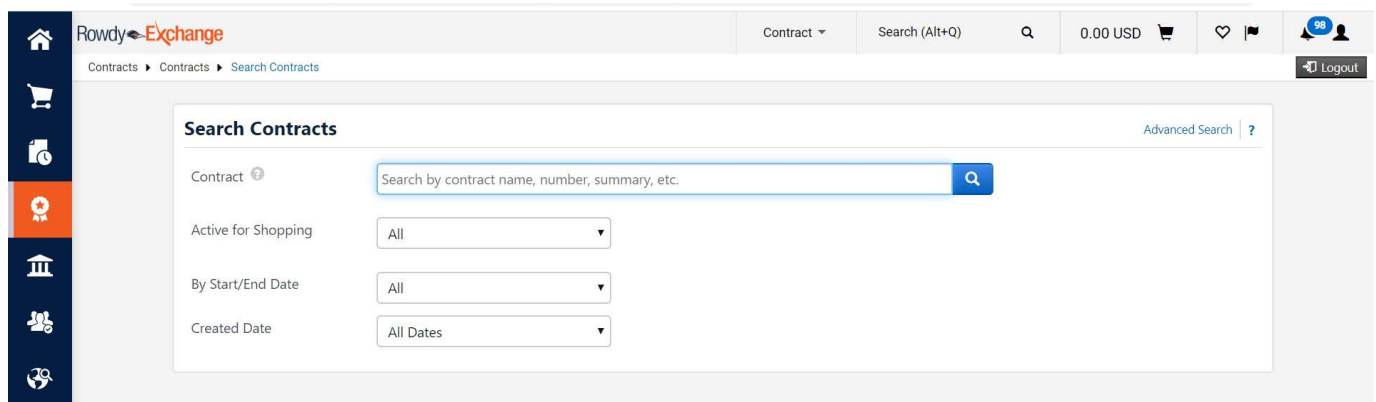
- Quick Links:** A section on the left with a heading and a description: 'Use "Search Documents" to look up your Contract Requests and "Search Contracts" to find contracts.' It includes links for 'My Contract Requests', 'Search Documents', 'Search Contracts', and 'Request Contract'.
- Contract Search:** A central search area with a text input field containing 'Search by contract name, number, summary, etc.', a search button, and links for 'Search Contract Parties' and 'Advanced Search'.
- Document Search:** A section below the contract search with a dropdown menu set to 'All Documents', a text input field with 'Document Numbers, Supplier, Product I', a search button, and a link to 'Advanced Search'.
- Shortcuts:** A section with links for 'My Requisitions', 'My Purchase Orders', 'My Vouchers', and 'My Approvals'.
- My Saved Searches:** A section listing saved searches: 'AfterTheFact', 'Andrea's Closed POs', 'ANTONIO MONSERRATE - INBOX', and 'BRIAN BIRD - INBOX'. A link 'View All Saved Searches' is also present.
- Action Items:** A section on the right with a heading and a message: 'There are no Action Items to display.'

The footer of the dashboard indicates it is 'Powered by JAGGAER' and includes a link to the 'Privacy Policy'.

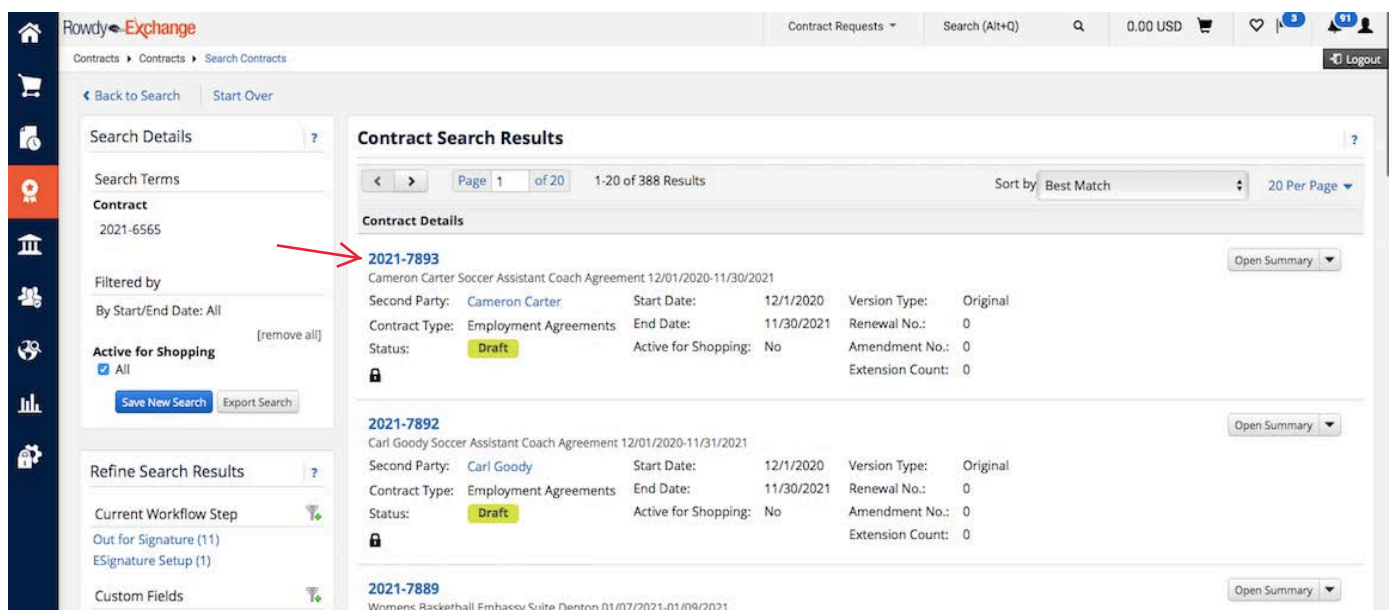
9. Search Executed and Approved Contracts. TCM provides users the ability to search for existing contracts as well contracts that have been approved by BCO but are pending final signature. To search for a contract, hover over the TCM Module (Medal/Ribbon). Under the title *Contracts*, click on *Search Contracts*.

TCM provides options for both a *Simple Search* and an *Advanced Search*.

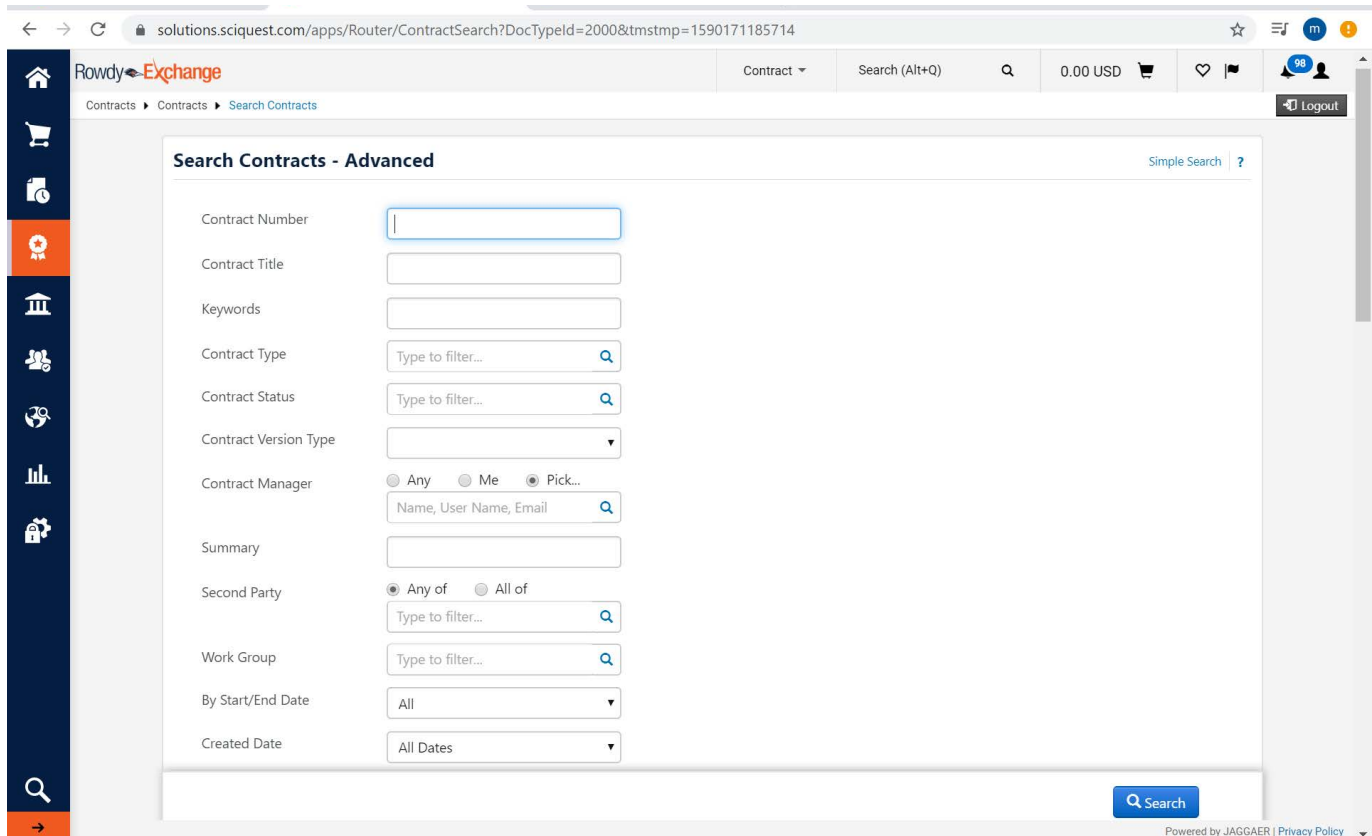
9.1 Simple Search. The Simple Search, shown below, is helpful if you're searching for a certain contract and you know the basic contract information, such as title, number, or summary. BCO recommends selecting the "All" option for the *Start/End Date* field.



After entering the information, click on the Magnifying Glass and TCM will show those contracts meeting your search criteria. Click on the Contract number to see the contract. For example, in the below Screen Shot, click on 2021-7893.



9.2 Advanced Search. To use the *Advanced Search*, shown below, change your search option in the upper right from Simple Search to Advanced Search.

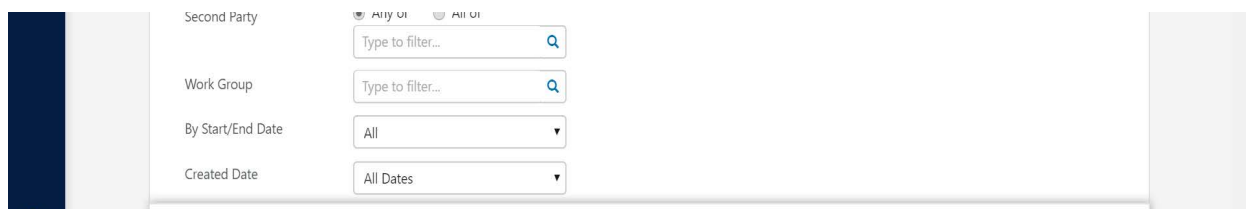


The screenshot shows the Rowdy Exchange Advanced Search interface. The browser address bar displays the URL: solutions.sciquest.com/apps/Router/ContractSearch?DocTypeId=2000&tmstmp=1590171185714. The interface includes a top navigation bar with a search bar, a currency display (0.00 USD), and a user profile icon. The main content area is titled "Search Contracts - Advanced" and features a "Simple Search" link. The search criteria are organized into a list of fields with corresponding input types:

- Contract Number: Text input
- Contract Title: Text input
- Keywords: Text input
- Contract Type: Text input with a search icon
- Contract Status: Text input with a search icon
- Contract Version Type: Dropdown menu
- Contract Manager: Radio buttons for "Any", "Me", and "Pick...", followed by a text input and a search icon
- Summary: Text input
- Second Party: Radio buttons for "Any of" and "All of", followed by a text input and a search icon
- Work Group: Text input with a search icon
- By Start/End Date: Dropdown menu with "All" selected
- Created Date: Dropdown menu with "All Dates" selected

A "Search" button is located at the bottom right of the search criteria section. The footer of the interface indicates it is "Powered by JAGGAER | Privacy Policy".

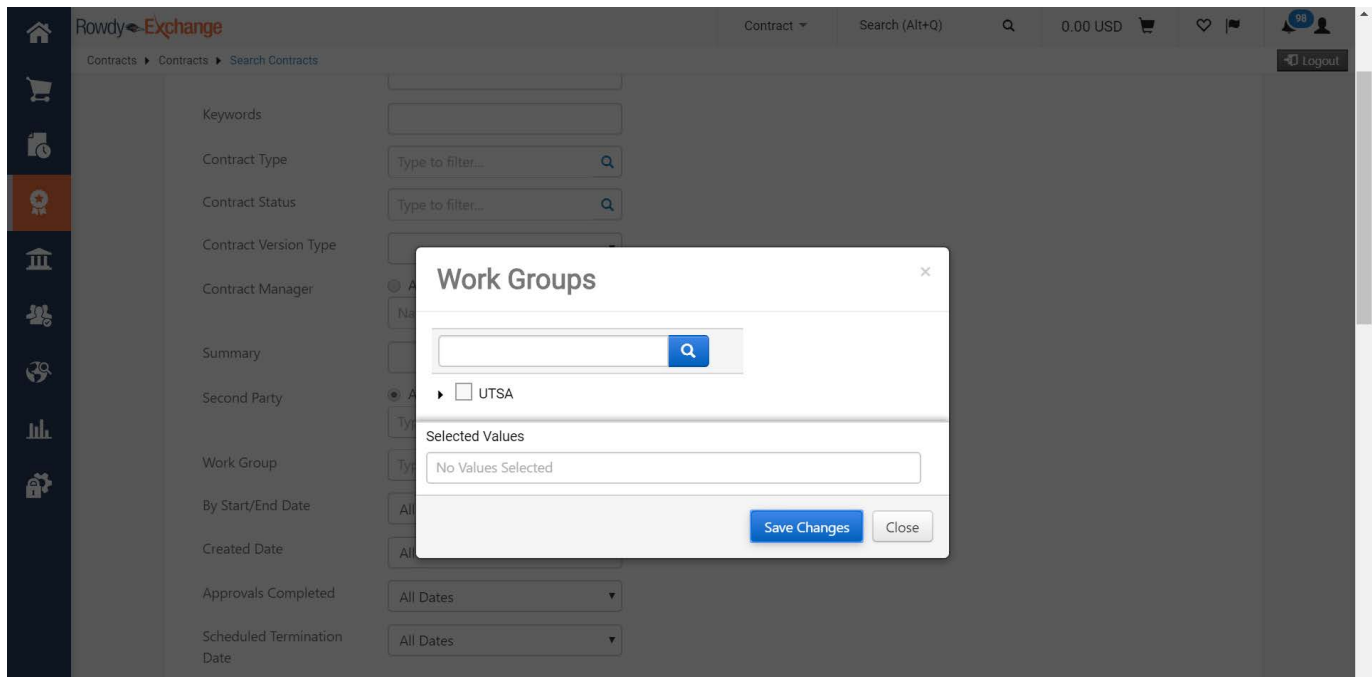
“Work Groups Means “Department.” To search for contracts under your department, use the field **“Work Groups.”** “Work Groups” equates to “department.” (This was not a title that SciQuest could modify.)



This close-up view shows the bottom portion of the search criteria list:

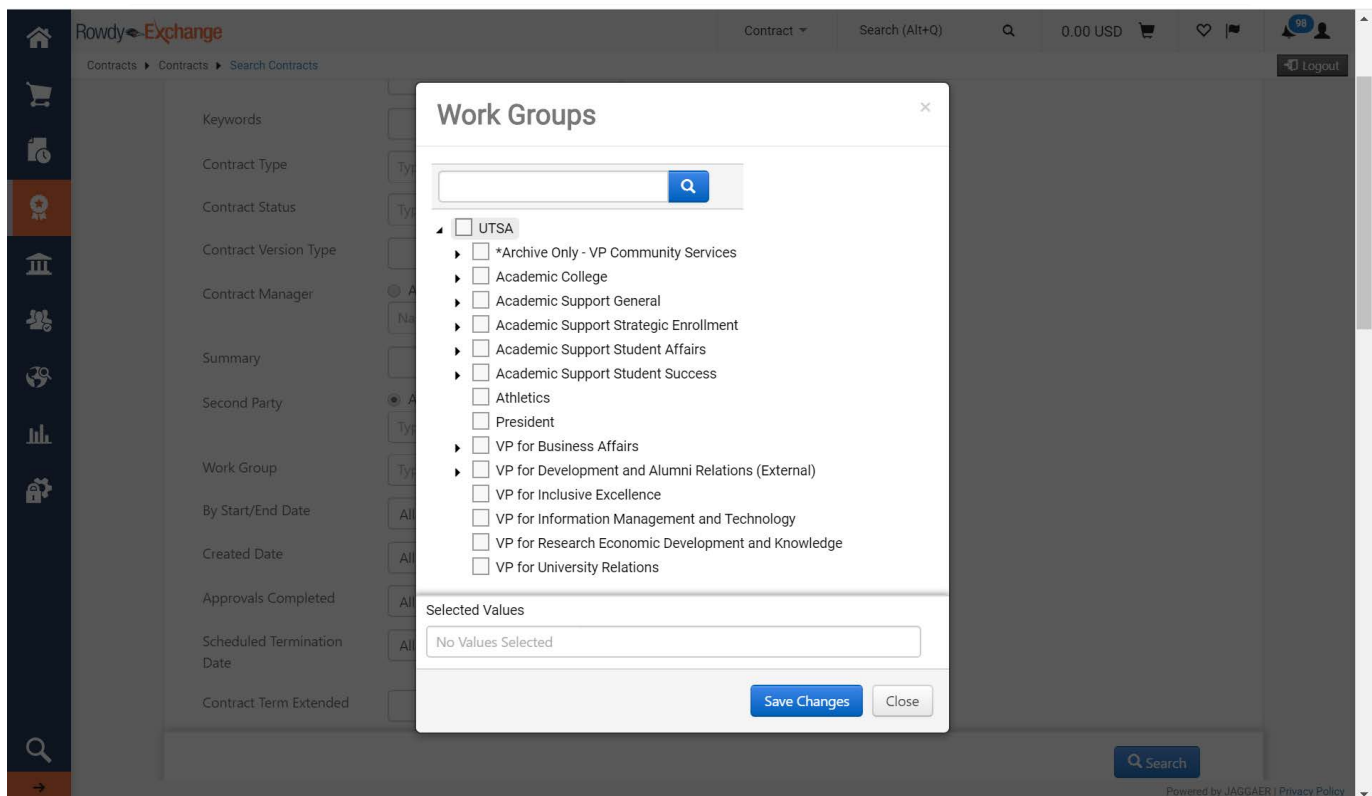
- Second Party: Radio buttons for "Any of" and "All of", followed by a text input and a search icon
- Work Group: Text input with a search icon
- By Start/End Date: Dropdown menu with "All" selected
- Created Date: Dropdown menu with "All Dates" selected

Click the Magnifying Glass. Use the magnifying glass to expand fields such as *Work Groups*, *Contract Type*, and *Status*.



The screenshot shows the Rowdy Exchange Search Contracts interface. A modal window titled "Work Groups" is open, displaying a search bar with a magnifying glass icon. Below the search bar, there is a list of selected values, which currently shows "No Values Selected". The modal also includes "Save Changes" and "Close" buttons. The background shows the search filters for Keywords, Contract Type, Contract Status, Contract Version Type, Contract Manager, Summary, Second Party, Work Group, By Start/End Date, Created Date, Approvals Completed, and Scheduled Termination Date.

Use the black drop-down **arrows** in the fields (do **NOT** check the box until you get to the specific dept/field that you need). Click Save Changes, and then hit the *Search* Button at the bottom of the Search Screen.

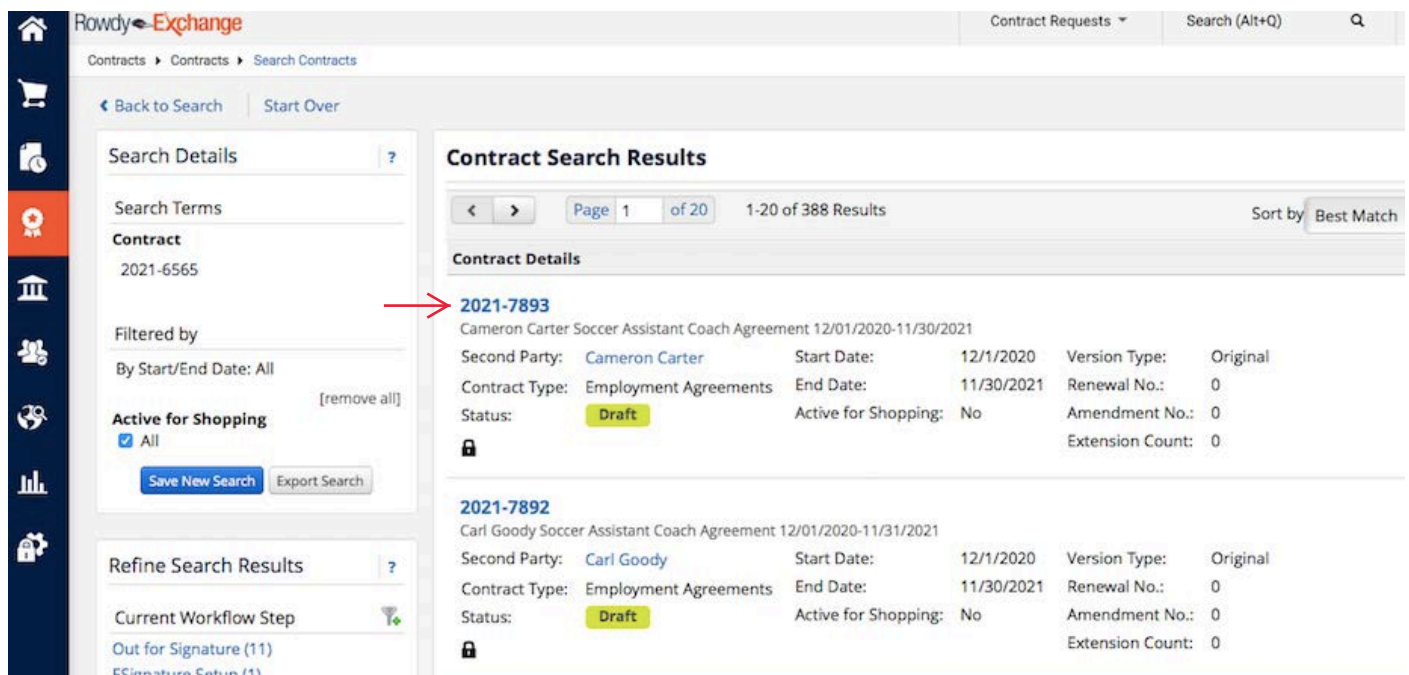


This screenshot shows the same Rowdy Exchange Search Contracts interface, but the "Work Groups" modal now displays a list of departments under the "Selected Values" section. The list includes:

- *Archive Only - VP Community Services
- Academic College
- Academic Support General
- Academic Support Strategic Enrollment
- Academic Support Student Affairs
- Academic Support Student Success
- Athletics
- President
- VP for Business Affairs
- VP for Development and Alumni Relations (External)
- VP for Inclusive Excellence
- VP for Information Management and Technology
- VP for Research Economic Development and Knowledge
- VP for University Relations

 The modal also includes "Save Changes" and "Close" buttons. The background shows the search filters for Keywords, Contract Type, Contract Status, Contract Version Type, Contract Manager, Summary, Second Party, Work Group, By Start/End Date, Created Date, Approvals Completed, and Scheduled Termination Date.

After hitting the *Search* Button, TCM should show those contracts meeting your search criteria. Click on the Contract number (i.e. 2021-7893) to see the contract.



Rowdy Exchange

Contracts > Contracts > Search Contracts

Contract Requests Search (Alt+Q)

Back to Search Start Over

Search Details

Search Terms

Contract

2021-6565

Filtered by

By Start/End Date: All [remove all]

Active for Shopping

☒ All

Save New Search Export Search

Refine Search Results

Current Workflow Step

Out for Signature (11)

ESignature Setup (1)

Contract Search Results

Page 1 of 20 1-20 of 388 Results Sort by Best Match

Contract Details

2021-7893

Cameron Carter Soccer Assistant Coach Agreement 12/01/2020-11/30/2021

Second Party: Cameron Carter Start Date: 12/1/2020 Version Type: Original

Contract Type: Employment Agreements End Date: 11/30/2021 Renewal No.: 0

Status: Draft Active for Shopping: No Amendment No.: 0

Extension Count: 0

2021-7892

Carl Goody Soccer Assistant Coach Agreement 12/01/2020-11/31/2021

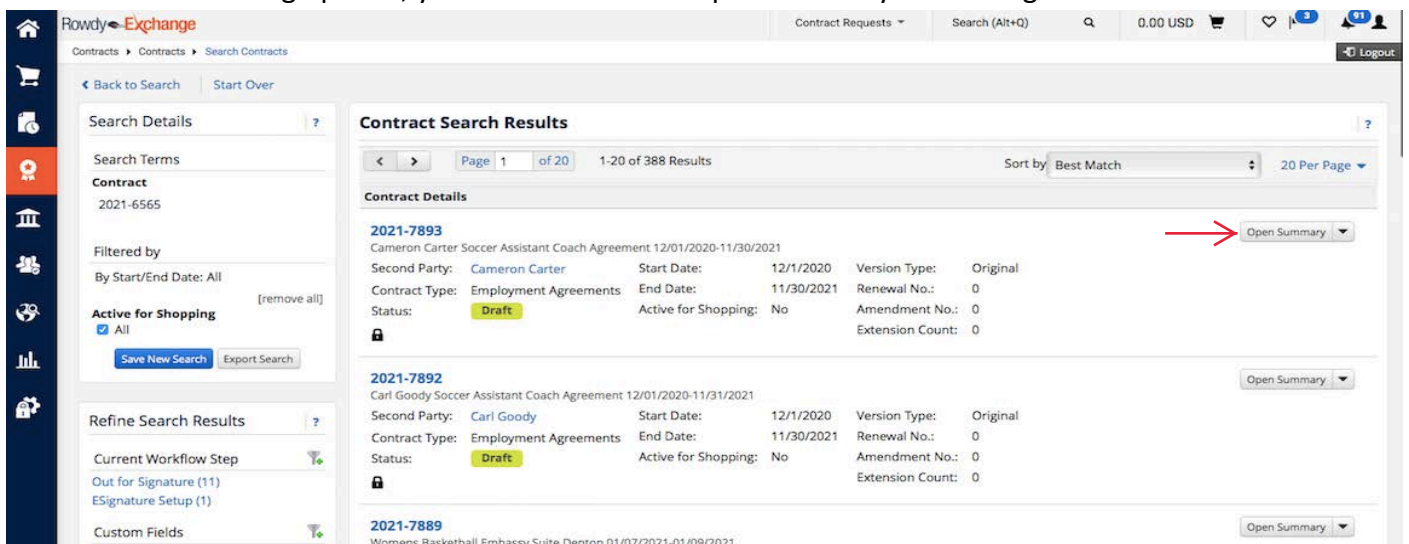
Second Party: Carl Goody Start Date: 12/1/2020 Version Type: Original

Contract Type: Employment Agreements End Date: 11/30/2021 Renewal No.: 0

Status: Draft Active for Shopping: No Amendment No.: 0

Extension Count: 0

For additional viewing options, you can also hit the “Open Summary” on the right side of the screen.



Rowdy Exchange

Contracts > Contracts > Search Contracts

Contract Requests Search (Alt+Q) 0.00 USD Logout

Back to Search Start Over

Search Details

Search Terms

Contract

2021-6565

Filtered by

By Start/End Date: All [remove all]

Active for Shopping

☒ All

Save New Search Export Search

Refine Search Results

Current Workflow Step

Out for Signature (11)

ESignature Setup (1)

Custom Fields

Contract Search Results

Page 1 of 20 1-20 of 388 Results Sort by Best Match 20 Per Page

Contract Details

2021-7893

Cameron Carter Soccer Assistant Coach Agreement 12/01/2020-11/30/2021

Second Party: Cameron Carter Start Date: 12/1/2020 Version Type: Original

Contract Type: Employment Agreements End Date: 11/30/2021 Renewal No.: 0

Status: Draft Active for Shopping: No Amendment No.: 0

Extension Count: 0

2021-7892

Carl Goody Soccer Assistant Coach Agreement 12/01/2020-11/31/2021

Second Party: Carl Goody Start Date: 12/1/2020 Version Type: Original

Contract Type: Employment Agreements End Date: 11/30/2021 Renewal No.: 0

Status: Draft Active for Shopping: No Amendment No.: 0

Extension Count: 0

2021-7889

Womens Basketball Embassy Suite Denton 01/07/2021-01/09/2021

You can search using any of the options in Advanced Search in any combination, such as searching for a specific contract *Type* and *Status* for your department (*WorkGroups*).

Support: Please email any issues or comments to the Business Contracts Office at businesscontracts@utsa.edu and feel free to contact BCO for any assistance. The BCO staff directory is located at <http://www.utsa.edu/bco/>