

## Contract Request

Any contract that involves the payment of any monies or commitment by the University that includes NMSU receiving goods, services, or any system/platform trials (provides temporary trial access) must be submitted to Procurement Services.

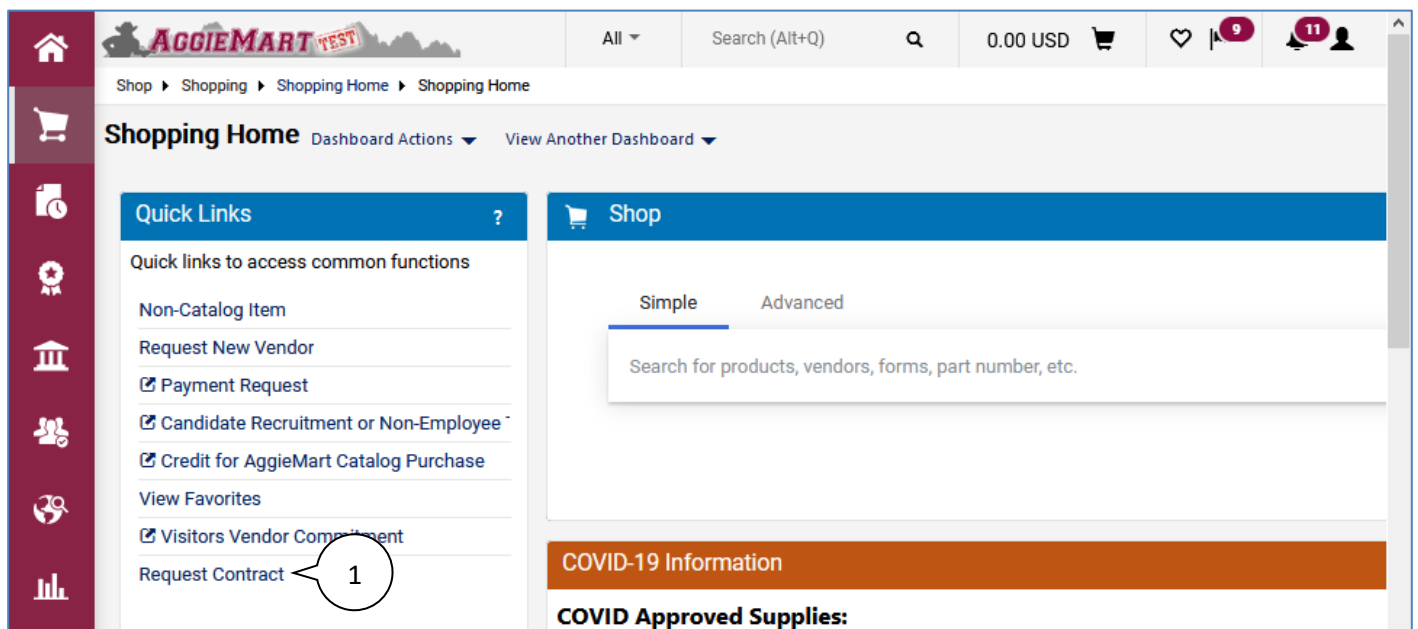
- ✓ Refer to <https://asc.nmsu.edu/procurement/> for definition of when a contract must be sent.

## Requisition Process for Contract Requests

Procurement Services will notify the contract requester when Procurement Services is ready for the requisition to be entered and will provide a contract number to be used on the requisition.

## Creating a Contract Request

This section will discuss how to initiate and submit a **Contract Request** in AggieMart.



1. Click the **Request Contract** link in the **Quick Links** section of the AggieMart home page.

The **Create Contract Request** pop-up window will be displayed.

2. Enter a name for the contract in the **Contract Request Name** field.
3. The **Contract Request Template** is automatically populated.
4. Click the **Submit** button.



**Team Tip:** *Once submit is clicked, the system saves your Contract Request as a Draft. If needed, you can stop working on the request at any point and then return to it later.*

*Refer to the **Draft Contract Requests** section of this guide.*

The **Instructions** screen will be displayed.

5. Read the **Instructions**. *Note: Follow the instructions carefully to avoid delays in processing the request.*
6. Click **Next**.

Sample request 1

Form Number: 524750  
Request Status: Incomplete

Instructions

**Details**

Attachments 0

Questions ✓

Questions ✓

Procurement Use Only ✓

Review and Complete

Discussion

Contract Request Workflow

**Details**

Contract Request Name \* Sample request 1

Template Vendor Contract

Contract Type -

Description Vendor provides NMSU with their standard contract.

< Previous Save Progress Next >

7. Review the **Details**. On this screen you have another opportunity to change the name of the request if desired.
8. If you need to return to the **Instructions** page → Click the **Previous** button.
9. Click **Save Progress**.
10. Click **Next**.

## Attachments

Sample request 1

Form Number: 524750  
Request Status: Incomplete

Instructions

Details

**Attachments** 0

Questions ✓

Questions ✓

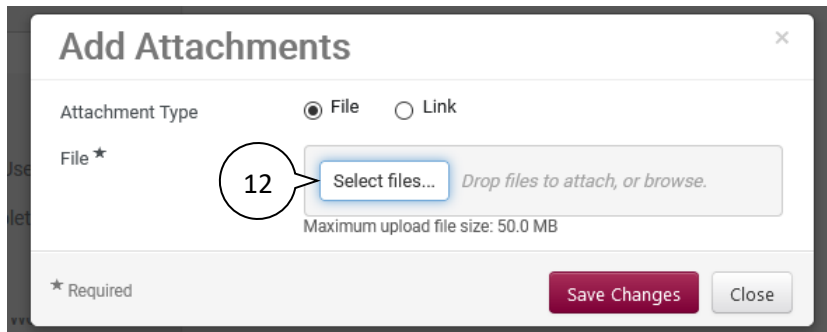
Procurement Use Only ✓

**Attachments**

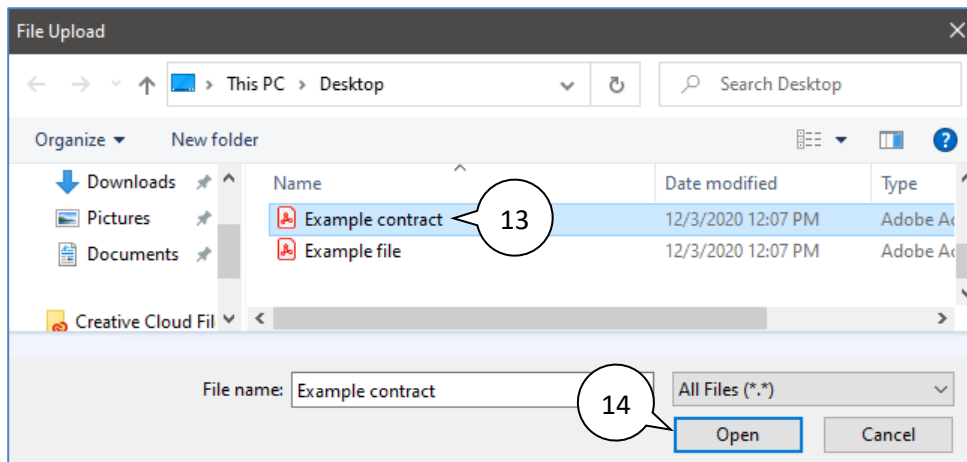
Add Attachments

< Previous Next >

11. Click the **Add Attachments** button.

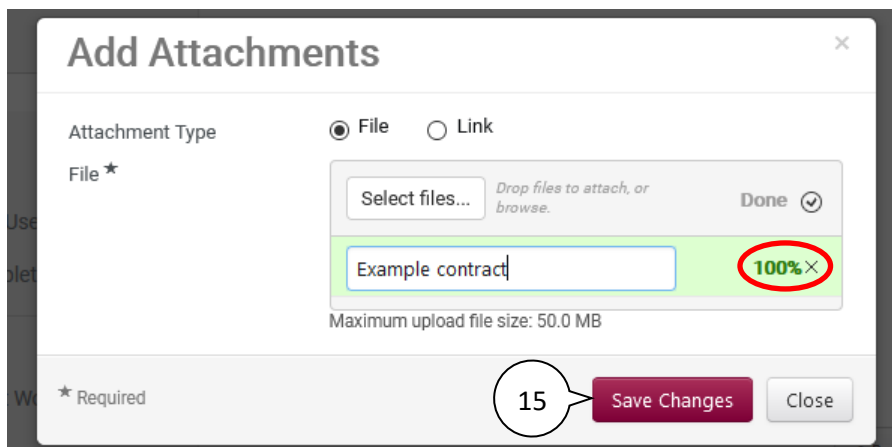


12. Click on **Select files...** A file upload window will open.



13. Navigate to the documents associated with the contract. You can select multiple files by holding the Ctrl key while clicking.

14. Click **Open**.



15. Once the upload status reaches **100%** → Click **Save Changes**.

Sample request 1

Form Number: 524750  
Request Status: Incomplete

Instructions

Details

**Attachments** 1

Questions ✓

Questions ✓

Procurement Use Only ✓

Review and Complete

Discussion

Contract Request Workflow

Attachments

Print Request | History | ?

Add Attachments

Request Attachments

Attachment	Size	Actions
Example contract	178 KB	Actions

< Previous

Next >

16. The uploaded file will be listed in the **Request Attachments** area.

17. To remove an attachment, click the **Actions** Actions button → Click **Delete** on the drop-down menu.

18. Click **Next**.

The **Questions** screen will be displayed.

## Questions Screen

Some of the questions have a **question mark** ? icon next to them. Clicking the icon will show information which may aid you with your answer. Questions with a **star** ★ are required fields.

Sample request 1

Form Number: 534308  
Request Status: Incomplete

Instructions

Details

Questions - Contract Information

Print Request | History | ?

On This Page

- Department Information (4)
- Vendor Information (4)
- Contract Information (7)

1. There are 3 short sections to be completed. **Department Information**, **Vendor Information**, and **Contract Information**.

Attachments **1**

Questions ✓

Review and Complete

Discussion

Contract Request Workflow

**Department Information**

Department Name \*

Department Contact Name \*

Department Contact Email \*

Department Contact Phone \*

2

2. Fill out the **Department Information** section.

**Vendor Information**

Is this vendor in AggieMart? \*

Yes  No

3

4

3. Scroll down to the **Vendor Information** section.
4. Select **Yes** or **No** to answer **Is this vendor in AggieMart?**  
**If you are unsure** if your vendor is in AggieMart or not → Select **Yes**. This will allow you to search for your vendor.

If the answer is **YES**:

Is this vendor in AggieMart? \*

Yes  No

Second Party \*

4a

joh

John Davis

John Deere Company

John Doe

John Q Hammons RVOCTR  
12281989

Search 10 More

- a. Enter part of the vendor name in the **Second Party** field and a list will appear → Click the vendor's name from the list to select it.

**Note:** If you did not find the vendor in AggieMart → Change your answer to **No**.

If the answer is **NO**:

Is this vendor in AggieMart? \*

Yes  No

Provide Vendor Name \*

Provide Vendor Email Address \*

- b. Enter the **Vendor Name**.
- c. Enter the **Vendor Email Address**.

5

6

7

8

9

10

**Contract Information**

Select Contract Type

Rental Agreements  Software  Service Agreement  Terms & Conditions

No Cost (Trial) \*

Yes  No

Total Contract Amount \*

Index Name \*

Index Number \*

100864 25% and 100783 75% (funding will be split) ...  
2000 characters remaining

5. Scroll down to the **Contract Information** section.
6. Click the box(es) to **Select Contract Type**. Select all that apply.
7. For **No Cost (Trial)** → Click **Yes** or **No**.
8. Enter the total dollar amount of the contract.
9. Enter the **Index Name** (for example, Operating, etc.).
10. Enter the **Index Number**. **Note:** You can enter anything in this field including split funding (as shown in the image above).

Purpose of Request \*

11

2000 characters remaining

Start Date ?

12

mm/dd/yyyy

Update Start Date Upon Execution ?

11. Explain the purpose of the contract in the **Purpose of Request** field.
12. Optional: **Start Date** of the contract.

13a

End Date ?

Expires On  No Expiration

mm/dd/yyyy

Auto-Renew

Yes  No

13b

Renewal Term

Renewals Remaining

14

15

★ Required

< Previous

Save Progress

Next >

13. Optional: **End Date**
  - a. Click either **Expires On** or **No Expiration**.
  - b. If **Expires On** is selected you will be asked additional questions such as **Date**, **Auto-Renew**, **Renewal Term**, and **Renewals Remaining**.
14. Click **Save Progress**.
15. Click **Next**.

The **Review and Complete** screen will be displayed.



Back to My Contract Requests

### Sample request 1

Form Number: 534308  
Request Status: Incomplete

Instructions  
Details  
Attachments 1  
Questions ✓

#### Review and Complete

Discussion  
Contract Request Workflow

### Review and Complete

Print Request History ?

✓ Required fields complete 16

Section	Progress
Instructions	✓ No Required fields
Details	✓ No Required fields
Attachments	✓ No Required fields
Questions	✓ Required fields complete

★ Required

< Previous 17 Complete Request

- 16. If required fields are completed successfully, all sections will have a **green checkmark** ✓ **icon**. Otherwise, an error message appears to inform you which questions have been missed.
- 17. Click **Complete Request**.

### Confirm

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

18 Yes No

- 18. When prompted to confirm your submission → Click **Yes** to proceed, or **No** if you are not ready yet.

The **My Contract Requests** screen will be displayed.

### My Contract Requests

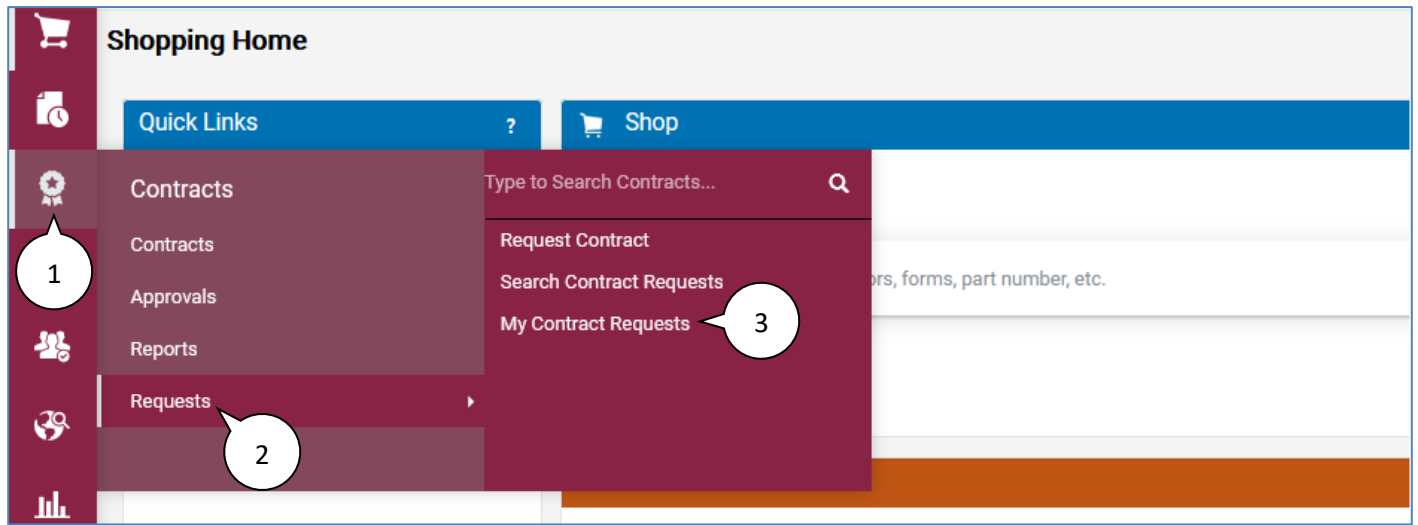
Filter Contract Requests Create New Contract Request


Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Actions
Sample request 1	Vendor Contract	Chris Stamm	Under Review	Procurement Review	-	3/3/2021 3:11 PM	2/26/2021 2:32 PM	Actions
DACC Software	Vendor Contract	Chris Stamm	Incomplete	-	-	3/5/2021 10:45 AM	3/5/2021 10:45 AM	Actions

19

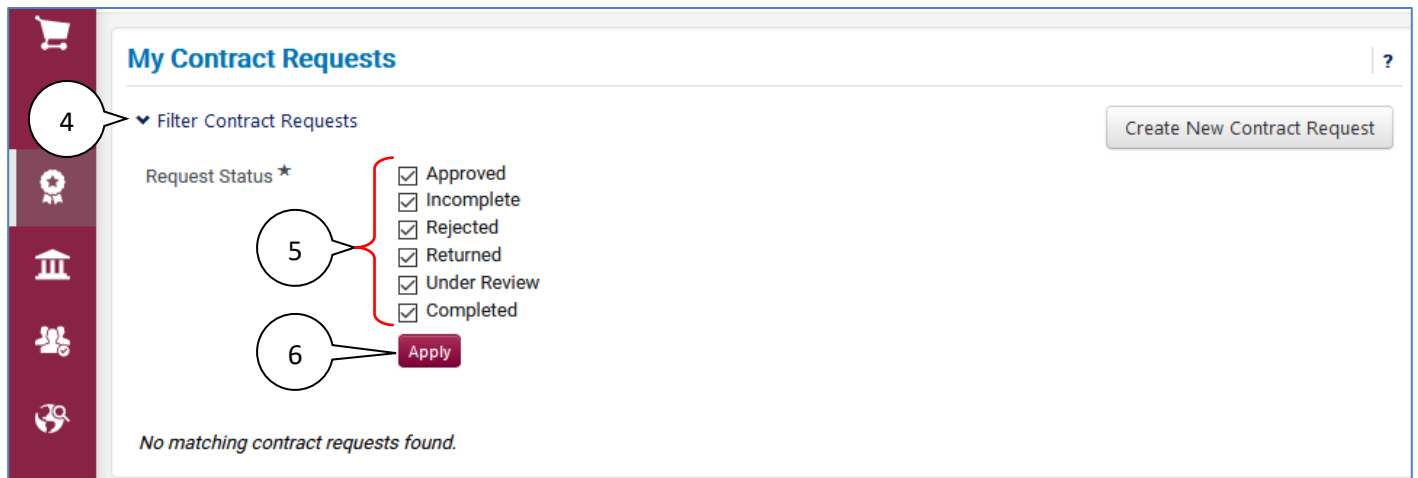
- 19. Your request will be listed on the **My Contract Requests** screen.

## Checking Contract Request Status



1. Click the **Contracts**  icon on the left side of the AggieMart home page.
2. Click **Requests**.
3. Click **My Contract Requests**.

The **My Contract Requests** screen is displayed.



4. Click on **Filter Contract Requests**.
5. Checkmark the boxes next to all status options.
6. Click **Apply**.

**My Contract Requests**

Contract Requests

Create New Contract Request

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Actions
Sample request 1	Vendor Contract	Chris Stamm	Under Review	Procurement Review	-	3/3/2021 3:11 PM	2/26/2021 2:32 PM	Actions ▼
DACC Software	Vendor Contract	Chris Stamm	Incomplete	-	-	3/5/2021 10:45 AM	3/5/2021 10:45 AM	Actions ▼

- Your **Contract Requests** are displayed. View a request by clicking on the request name.
- The **Request Status** and **Workflow Step** are shown.

### Draft Contract Requests

- Navigate to **My Contract Requests**. Refer to the previous section if needed.

**My Contract Requests**

Filter Contract Requests

Create New Contract Request

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Actions
Sample request 1	Vendor Contract	Chris Stamm	Under Review	Procurement Review	-	3/3/2021 3:11 PM	2/26/2021 2:32 PM	Actions ▼
DACC Software	Vendor Contract	Chris Stamm	Incomplete	-	-	3/5/2021 10:45 AM	3/5/2021 10:45 AM	Actions ▼ <ul style="list-style-type: none"> <li>Edit</li> <li>Delete</li> </ul>

- Draft Contract Requests** are identified as having a status of **Incomplete**.
- To **Edit** or **Delete** a draft request.
  - Click on the **Actions** **Actions** button to the right of the draft. A drop-down menu appears.
  - To resume working on the draft → Click **Edit**.
  - To discard the draft → Click **Delete**.