

Total Contracts Manager (TCM) - Rowdy Exchange Requester User Guide for Research and Sponsored Program Contracts Contracts & Industry Agreements

IN THIS GUIDE, LEARN HOW TO:

Log on to Rowdy Exchange

[Section 1](#)

Total Contracts Manager (TCM) within Rowdy Exchange

[Section 2](#)

Complete a Contract Request in TCM-Rowdy Exchange

(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 TCM-Rowdy Exchange Home Page to the Contract Requester Dashboard

[Section 8](#)

Search for Contracts

[Section 9](#)

Support

[Section 10](#)

IMPORTANT NOTICES:

Submit your contract request to the appropriate office

The **TCM-Rowdy Exchange** portal is used for contracts requests submitted to:

- [Contracts & Industry Agreements \(CIA\)](#) – Used for sponsored program contracts and research related agreements.
- [Business Contracts Office \(BCO\)](#) – Used for business service contracts.

Please select the appropriate Contract Request Template when submitting your request.

Found the right office – Who submits the contract request?

Financial Agreements <STOP>: If you need a research contract or sponsored project agreement that involves a financial exchange, please contact your [Research Service Center \(RSC\)](#) before proceeding.

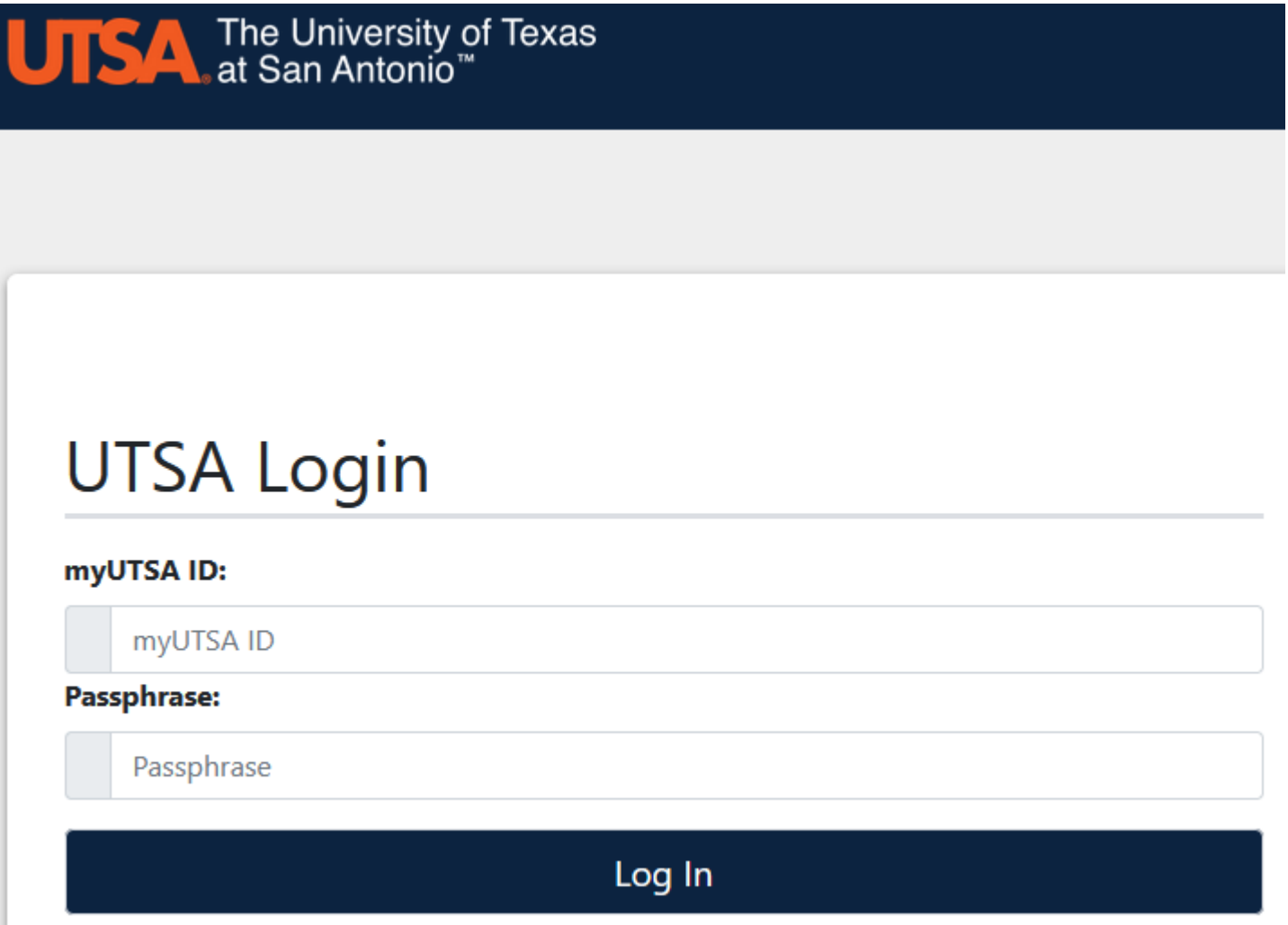
- If this financial contract is for a project proposal that was previously routed through the RSC, and has now been funded the sponsor, the RSC team will submit the contract request directly to our office. No need to submit a separate contract request.
- If you have a financial contract, but the project proposal has *not* been routed yet, then you must coordinate with the RSC team to route the project for institutional approval. Once this is done, the RSC will submit the contract request directly to our office. No need to submit a separate contract request.

Please see the Research Service Center website for further information on the proposal submission process, located at: <https://research.utsa.edu/ospa/rsc.html>

Non-Financial Agreements <GO>: For research related agreements with no financial consideration, please submit your contract request electronically through the TCM-Rowdy Exchange.

1. **Access Total Contract Manager (TCM) – Rowdy Exchange.** Enter your myUTSA ID and Password to log in. Access the TCM-Rowdy Exchange site by following the link below:

<https://solutions.scquest.com/apps/Router/SAMLAuth/UTSA>

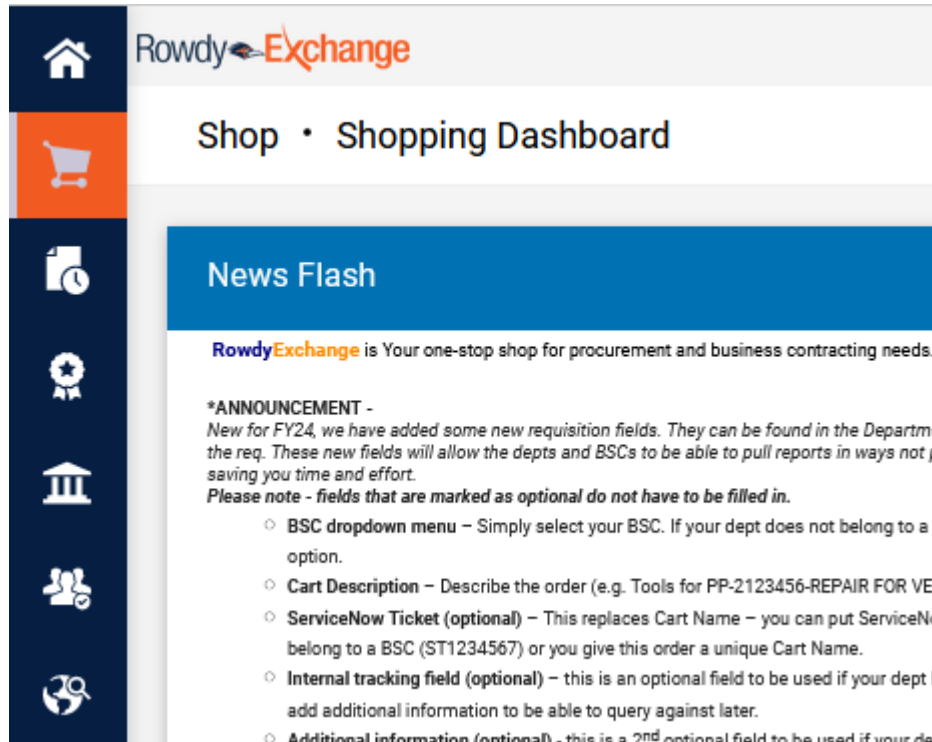


The screenshot shows the UTSA Login page. At the top, there is a dark blue header with the UTSA logo and the text "The University of Texas at San Antonio™". Below the header is a light gray bar. The main content area is white and contains the following elements:

- A large heading "UTSA Login" with a horizontal line underneath.
- A label "myUTSA ID:" followed by a text input field containing the placeholder text "myUTSA ID".
- A label "Passphrase:" followed by a text input field containing the placeholder text "Passphrase".
- A dark blue button with the text "Log In" in white.

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

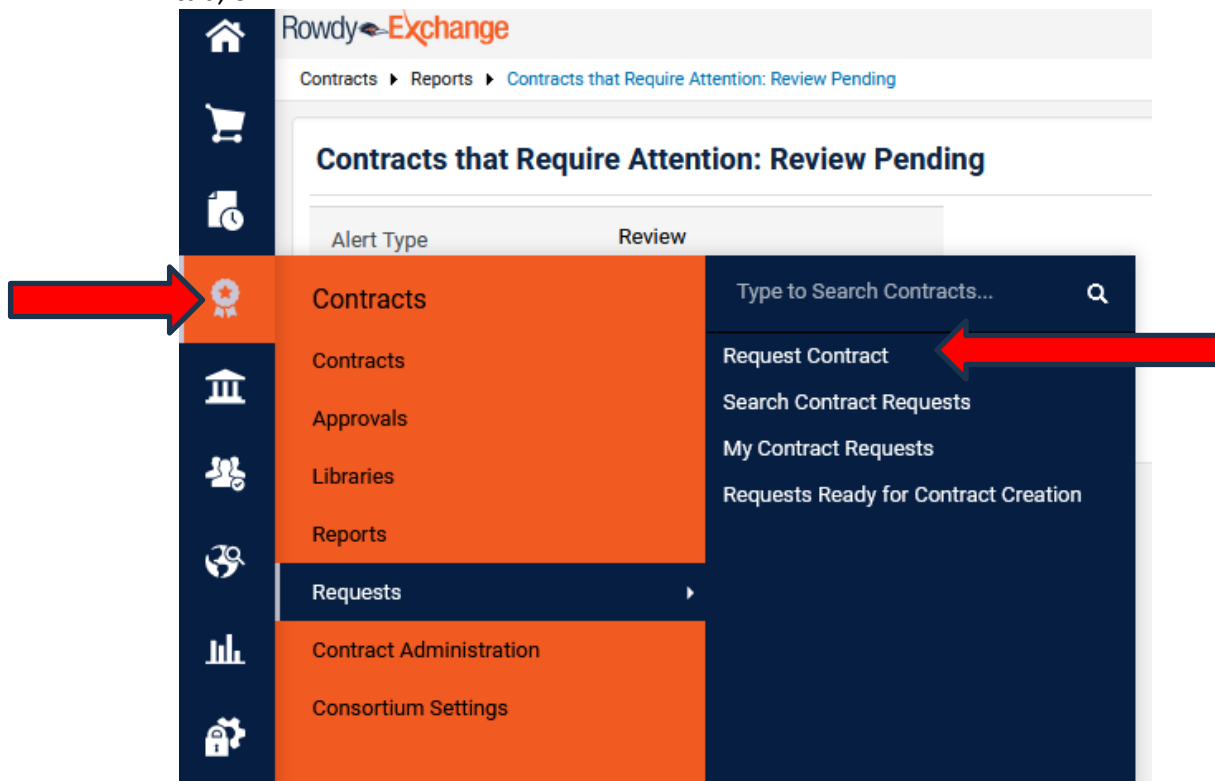
Note: If desired, you can set the TCM-Rowdy Exchange Home Page to the TCM “Contract Requester Dashboard” instead of the “Shopping Dashboard”, as described in [Section 8](#). Please remember that while setting your home page to the “*Contracts Requester Dashboard*” is helpful, doing so is not required to complete a contract request.



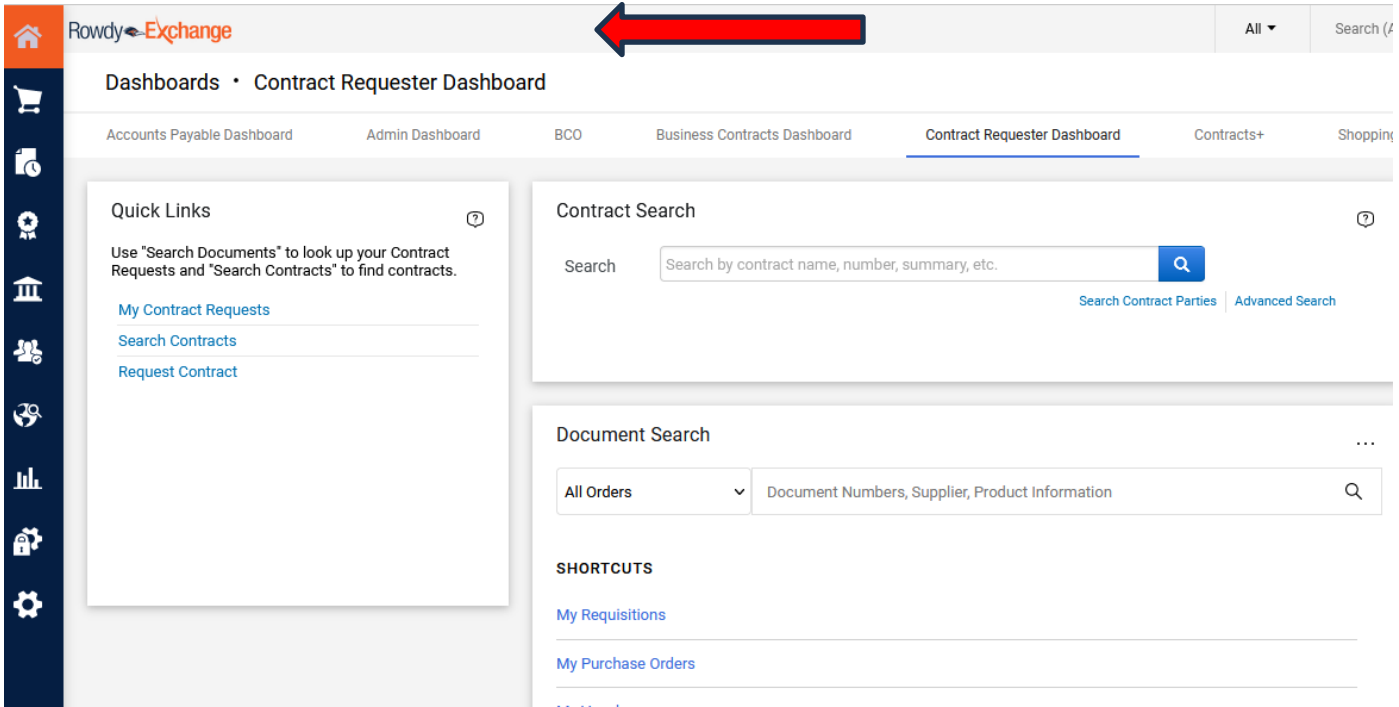
3. Completing a Contract Request

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

- (i) Click on the Medal/Ribbon icon on the left tab, then on *Request Contract* under the *Requests* tab; or

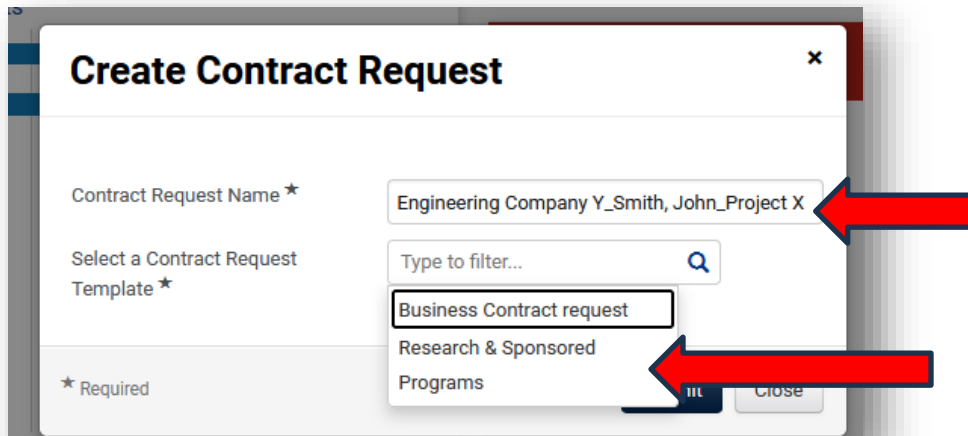


- (ii) If you have set your home page as the *Contracts Requester Dashboard* (ref. Section 8), click *Request Contract* under *Quick Links*.



3.2 Submit a Contract Request. Give the request a name and click *Submit* to begin completing the Contract Request.

- (i) This particular request is named “*Engineering Company Y_Smith, John_Project X*”. We recommend that for the Contract Request Name, you use the sponsor’s or partner’s name, the name of Principal Investigator (PI) or Lead, and the project name if there is one.
- (ii) For “Select Contract Request Template,” you will have two options: 1) Business Contract request, or 2) Research & Sponsored Programs. You must select “**Research & Sponsored Programs**” and then hit *Submit* if you need a research or sponsored program agreement.



3.3 Informational Instructions Page. You should now be on the *TCM Electronic Request Instructions* page (shown below). The Instructions page contains general information about submitting a research contract request in TCM to Contracts & Industry Agreements (CIA) office, the steps needed for the submission of financial agreements, and standard processing timeline.

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

Print Request
History
?

Instructions

***Important Note:** These instructions are for Research and Sponsored Program Agreement requests.*

If you need a business service contract, please complete the electronic request form for the Business Contracts Office, titled "Business Contract Request".

Welcome to Total Contract Manager!

Below is some guidance to assist you with your research contract request.

The Contracts & Industry Agreements (CIA) team within the Office for Research, Economic Development, and Knowledge Enterprise (REDKE) supports UTSA faculty and staff in their efforts to advance the research enterprise by facilitating, drafting, negotiating, and executing a variety of contracts and agreements. For more information regarding the CIA office, visit [Contracts & Industry Agreements](#).

Where to Begin

Financial Agreements. If you need help with an agreement that involves funding, the first step in the process is to work with your designated Research Service Center (RSC), see [Research Service Center Information](#). The RSC staff will assist you with the routing of the project proposal to receive institutional approvals. Once you receive the award, the RSC staff will submit a contract request directly to our team through the TCM system. CIA will review and negotiate the appropriate contract with the other party. *Examples: Sponsored Research Agreement (SRA), Contract, and Task Orders.*

Non-Financial Agreements. If you need help with an agreement that does not contemplate the exchange of funding, you can submit the contract request directly to our team, CIA, through the TCM system. You will need to provide the required information and documentation for the type of agreement requested. If you do not know the type of agreement you need, the CIA staff will help you make the determination based on the nature of the engagement. You will need to provide basic information regarding the effort. CIA staff will then draft and negotiate the appropriate agreement with the other party. *Examples: Material Transfer Agreement (MTA), Non-Disclosure Agreement (NDA), and Memorandum of Understanding (MOU).*

CIA staff will update the contract record on a regular basis, and you will be able to see the contract status in the TCM system.

As you complete this contract request, please note that "Other Party" means the sponsor funding the project, external research collaborator, or potential partner in the case of unfunded agreements.

Uploading Contract Attachments

Contracts and supporting documentation can be uploaded in the Attachment Page contained in this request form.


Please upload the contract document and supporting documentation as separate files and label the files accordingly.

If you are submitting any sponsor/partner generated contract documents, please upload a modifiable MS Word format.

Standard templates for commonly requested contracts are located on the Contracts & Industry Agreements website [CIA Standard Contracts & Agreement Templates](#).

Contract Timeline

The negotiation and execution of research contracts can take varying amounts of time to complete. It depends on several factors, including the timely provision of required information regarding the proposed engagement, nature of the transaction, number of parties, and responsiveness of the other parties.


Next >

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*.

← Back to My Contract Requests
Print Request | History | ?

Engineering Company Y_Smith, John_Project X

Form Number: 838210
Request Status: Incomplete

Instructions

Contract Title Confirmati...

Attachments - Please upl... 0

Contract Information ✓

Review and Complete

Discussion

Contract Request Workflow

Contract Title Confirmation

Contract Request Name ★ ←

Template: Research & Sponsored Programs

Contract Type: -

Description: Research & Sponsored Programs contract request

Contract Request Type: Create Contract

← Previous
Save Progress
Next →

3.5 Attachments Screen. This screen allows you to attach the proposed contract to the request if it has been provided by the other party, scope of work, budget, relevant emails, forms, or other documentation that should be submitted to the Contracts & Industry Agreements office for completion of the contract. Simply click *Add Attachments*, then select files to upload the files and click *Save Changes*. Please upload the contract and any supporting documentation as separate attachments. Click *Next*.

Add Attachments ×

Attachment Type File Link

File ★

Select files...
Drop files to attach, or browse.
Done ✓

Sponsored Research Agreeer
100% ×

Max. File Size: 50.0 MB

★ Required

→
Save Changes
Close

Attachments - Please upload contract documents

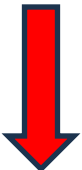
[Print Request](#) | [History](#) | [?](#)

Add Attachments

▼ Request Attachments

Attachment	Size	Actions
Sponsored Research Agreement (SRA)_(CR)_Template_April 2022.docx	41 KB	Actions ▼
UTSA_Proposal_Budget_Template_FY23_ENotes.xlsx	526 KB	Actions ▼

< Previous



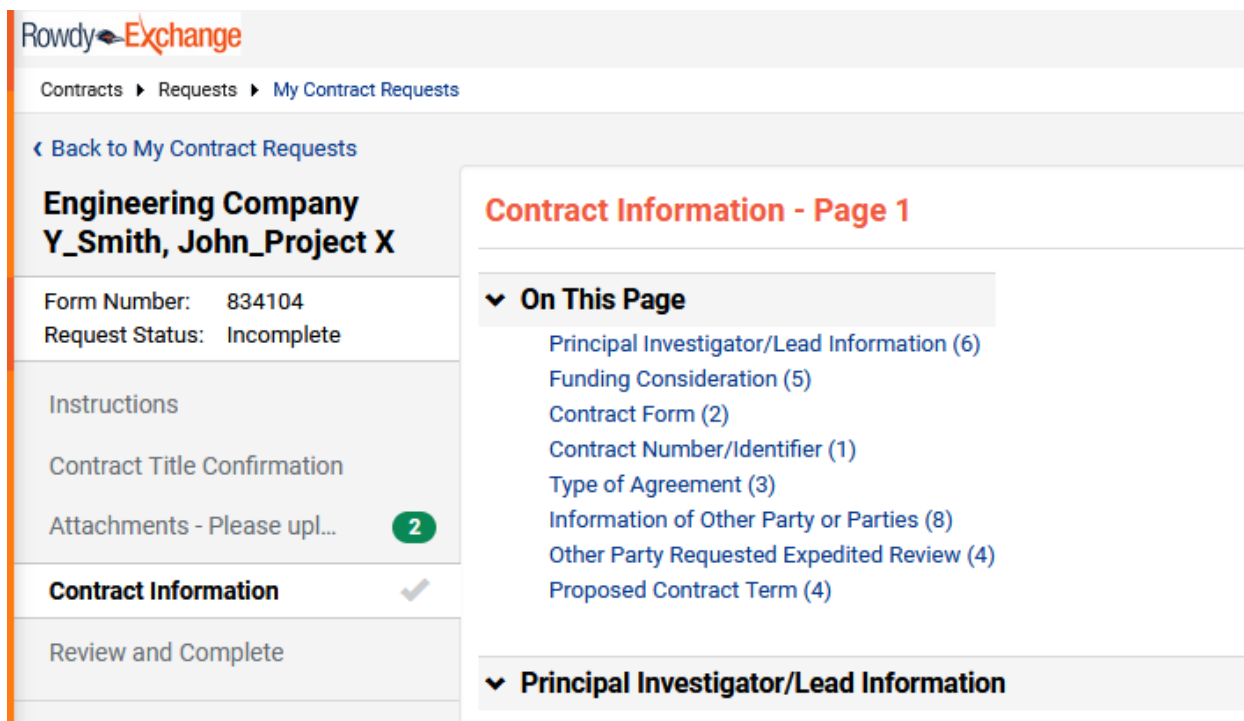
Next >

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 screenshot.

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 log in again your saved information will be available under “My Contract Requests.” The My Contract Requests fields and related options are discussed in Section 5.




The screenshot shows the 'Contract Information - Page 1' screen in the Rowdy Exchange system. The breadcrumb trail is 'Contracts > Requests > My Contract Requests'. The page title is 'Engineering Company Y_Smith, John_Project X'. Key details include Form Number: 834104 and Request Status: Incomplete. A sidebar on the left lists navigation options: Back to My Contract Requests, Instructions, Contract Title Confirmation, Attachments - Please up... (with a green circle containing the number 2), **Contract Information** (with a checkmark), and Review and Complete. The main content area has a section 'On This Page' listing: Principal Investigator/Lead Information (6), Funding Consideration (5), Contract Form (2), Contract Number/Identifier (1), Type of Agreement (3), Information of Other Party or Parties (8), Other Party Requested Expedited Review (4), and Proposed Contract Term (4). Below this is a section for 'Principal Investigator/Lead Information'.

3.6.1 Principal Investigator / Lead Information. This section in the Contract Information asks for basic information regarding the Principal Investigator or Lead for the project/activities to be conducted under the contract.

Contract Information - Page 1

▼ On This Page

- Principal Investigator/Lead Information (6)
- Funding Consideration (5)
- Contract Form (2)
- Contract Number/Identifier (1)
- Type of Agreement (3)
- Information of Other Party or Parties (7)
- Other Party Requested Expedited Review (4)
- Proposed Contract Term (4)

▼ Principal Investigator/Lead Information 

PI Name [★]

Title [★]

Phone number

Email Address [★]

College/Administrative Unit

Department/ Center/ Institute


3.6.2 Funding Consideration. Please select the appropriate option. If you are requesting an agreement that involves a financial exchange, then select “*Financial*”. If you need an agreement with no financial consideration, then select “*Non-Financial*”.

- (i) If you select **Financial**, additional fields will pop up that need to be completed. First, you must indicate whether the Financial Agreement involves “Incoming” (UTSA receiving) or “Outgoing” (UTSA providing) funds.
 - If you select *Financial* and *Incoming*, then you must provide the link to Proposal ID in the UTSA REDKE Routing System 2.0.

- If you select *Financial* and *Outgoing*, an additional field will pop up you must specify if the contract request is for a “Sub-Agreement” or “Other”. If Other, then you must provide the details.

▼ Funding Consideration


Funding Consideration *

Financial 

Non-Financial

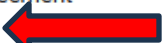
Incoming or Outgoing funds? *

Incoming

Outgoing 

Is this contract a Sub-Agreement or other? *

Sub-Agreement


Other 

(ii) If you select **Non-Financial**, a different set of fields will pop up based on the “Type of Non-Financial Agreement” you select. For example, if you select “Non-Financial” and “Material Transfer Agreement (MTAOUT)”, then you will see a series of MTA specific questions in the latter half of the intake form.

▼ Funding Consideration

Funding Consideration *

Financial

Non-Financial 

▼ Type of Agreement


Type of Agreement *

New

Amendment or Modification

Renewal

Type of Non-Financial Agreement

Material Transfer Agreement (MTAOUT) 

▼ **Material Transfer Agreement** 

Type of Disclosure *

- UTSA Providing
- UTSA Receiving
- Mutual exchange

Type of Material (check all that apply) *

- Biological (antibodies, cell lines)
- Compound/chemical
- Plasmid
- Human Specimen
- Animal
- Other

Describe the Material (exact name and any other relevant identifier) *

2000 characters remaining

Describe the purpose and intended use of the Material (research plan/scope of work) *

2000 characters remaining

3.6.3 Contract Form. Select “Yes” only if you are using a standard contract template approved by the Contracts & Industry Agreements office. The answer is “No” if you are using the contract template provided by the other party. Finally, answer “Yes” to certify that you have uploaded the appropriate documents under the Attachments page.

▼ **Contract Form**

Is this a UTSA standard form contract?


- Yes
- No


Required documents for this contract request have been uploaded. If the other party has provided a draft contract on their template, or if there is already a draft contract on a standard UTSA template, please upload the MS word document.

- Yes

3.6.4 Contract Number/Identifier. If you are submitting a contract provided by the other party and the contract has a number or identifier, please enter the information here. If the document does not include a contract number, you can use this field to provide any other relevant information that will help us better track the request, e.g., if request is related to previous contract, aka parent contract.



▼ Contract Number/Identifier

Contract Number/Identifier (if any) 



3.6.5 Type of Agreement. Select appropriate option. You can indicate if the contract request is for a “New” agreement, an “Amendment or Modification” to an existing agreement, or a “Renewal” of a previous agreement. Once you have made a selection, then click on the dropdown menu for the “Type of Financial Agreement” and select appropriate agreement needed.

Please note that the dropdown menu options will correspond to the answer you provided under the “Funding Consideration” section, either *Financial* or *Non-Financial*.

<p>▼ Type of Agreement</p> <p>Type of Agreement *</p> <p><input checked="" type="radio"/> New <input type="radio"/> Amendment or Modification <input type="radio"/> Renewal</p> <p>Type of Non-Financial Agreement </p> <p><input type="text" value="Non-Disclosure Agreement - Providing (NDAPRV)"/> ▼</p>	<p>▼ Type of Agreement</p> <p>Type of Agreement *</p> <p><input checked="" type="radio"/> New <input type="radio"/> Amendment or Modification <input type="radio"/> Renewal</p> <p>Type of Financial Agreement </p> <p><input type="text" value="Contract (CTR)"/> ▼</p>
---	--


3.6.6 Information of Other Party or Parties. Enter the information for the sponsor or partnering organization, as well as the type of organization, and whether the organization is a US entity or not.

- (i) If the Other Party is not a US entity, the selection of “No” will trigger an additional pop up field where you must indicate the country.
- (ii) Add the name of the full name for the “Second Party Name”. If there are multiple second parties, then also add the additional parties under “Additional Secondary Party Name” and/or “More Secondary Party Name”.
- (iii) In TCM the Contract file, UTSA will be the “First Party (Primary)” and the first other party will be the “Second Party (Primary)”, every other party after that will be identified as “Second Party”.


Please note that this section is for the contracting parties, that is the entities/organizations entering into a contract and signing said contract, thus accepting the obligations, responsibilities, and benefits specified within the contract.

Information of Other Party or Parties


Secondary Party Name ★

Engineering Company X 

Is the Other Party a US Entity?

Yes No 


Please specify the country ★

Germany 

Organization Type

<input checked="" type="checkbox"/> Business/ Industry	<input type="checkbox"/> Nonprofit	<input type="checkbox"/> Foundation	<input type="checkbox"/> Academic
<input type="checkbox"/> Federal Government	<input type="checkbox"/> Local Government	<input type="checkbox"/> State Government	<input type="checkbox"/> Other, specify

Additional Secondary Party Name

Science Company Y 

More Secondary Party Name ?

....

3.6.7 Other Party Requested Expedited Review. Please indicate if the “Other Party”, aka sponsor or partner has requested an expedited review and provide reason for the expedited review. Otherwise, the request will follow standard processing time. It is important that you enter this information to prioritize requests appropriately. The explanation below is provided as an example.

Other Party Requested Expedited Review

Please see instructions regarding standard contract timeline. If the other party has requested an expedited review, please provide information below. ★

- No, standard review is acceptable
- Yes

Provide reason for expedited review ★

Per funding agency must execute contract prior to their fiscal year end

1929 characters remaining

Expedited review needed by? ★

- Urgent (1-2 business days)
- Priority (1-2 weeks)
- Specific deadline

3.6.8 Proposed Contract Term. Enter the *Start Date* for the contract, then select “Expires On” or “Term” as appropriate to enter the contract termination date.

- (i) If you select *Expires On*, another date field will appear to enter the anticipated end date.
- (ii) If you select *Term*, you must indicate the number of years, months, or days for the contract.
- (iii) Please also indicate if the parties have initiated activities, subject to appropriate approvals.

Proposed Contract Term

Start Date ★ ⓘ

08/22/2023📅

mm/dd/yyyy

Update Start Date Upon Execution ⓘ

End Date ★ ⓘ

Expires On Term

09/10/2024📅

mm/dd/yyyy

Proposed Contract Term

Start Date ★ ⓘ

08/22/2023📅

mm/dd/yyyy

Update Start Date Upon Execution ⓘ

End Date ★ ⓘ

Expires On Term

1

▲
▼

Years▼

3.6.9 Scope of Work or Proposed Activity. Please provide the appropriate information based on the type of agreement.

- (i) If you selected “**Financial**” under the previous “Funding Consideration” section, you will see a section titled “Statement of Work” asking you to confirm that the detailed SOW uploaded in the system as an attachment contains the appropriate level of detail.

Statement of Work

Statement of Work (SOW) describes the scope of work required to complete specific project. It is a formal document and must be approved by all contracting parties. The SOW must contain an appropriate level of detail to clearly understand the work required, duration, deliverables, and standard of acceptance.

Please upload the latest version of the SOW in MS word document under the Attachment section

Project description is clear, complete, and accurate

- Yes
- No

Activities are clearly outlined

- Yes
- No

Deliverables are clearly outlined

- Yes
- No

- (ii) If you selected “**Non-Financial**” under the previous “Funding Consideration” section, you see a section titled “Proposed Activity”. Please enter a detailed description of the activity or activities to be conducted. If you have a separate document that includes this information, please remember to upload it in the system under the Attachments section.

Proposed Activity

Description of Proposed Activity [★]

2000 characters remaining

3.6.10 Funding Information. If the request is for a financial contract and you selected “**Financial**” under the earlier “Funding Consideration” section, then you will see this section requesting the financial details for the contract. Enter the required funding information. As a reminder, once you click “Save Progress” on that page, the system will update the “Total Funding Amount” to include the appropriate nomenclature, e.g., commas and period for cents.

- (i) Payment Type – Select the requested payment type for the contract, either cost reimbursable, fixed price, pre-paid, or other.
- (ii) Indirect Cost Rate – Enter the appropriate indirect cost rate for the project and if it has been approved by UTSA.
- (iii) RSC staff remarks – Enter any relevant information regarding the payment terms, any discrepancies between the proposal submitted and the agreement received, e.g., different funding amount. Please

also feel free to use this section to indicate any other issues, like an incomplete or incorrect scope of work or reporting requirements, incorrect PI name, missing attachments, etc.

▼ Funding Information

Total Funding Amount [★]

150,000

 USD

Payment type [★] ?

Cost Reimbursable ▼

Indirect Cost Rate % [★]

50

Was the indirect cost rate approved by UTSA? [★]

Yes
 No
 Pending Approval

RSC staff remarks on payment terms ?

PI requested monthly payments.

1970 characters remaining

[★] Required

← Previous
Save Progress
Next >

3.6.11 Intellectual Property, Human Subjects, and Export Controls. If the request is for a non-financial contract and you selected “*Non-Financial*” under the earlier “Funding Consideration” section, then you will see these compliance related questions instead of funding information questions.

- (i) Intellectual Property - Please complete this section. The information provided here will help us assess the intellectual property considerations for this contract request.

▼ Intellectual Property

I agree to be bound by and comply with the terms of The University of Texas System Intellectual Property Policy and to disclose to designated UTSA officials all inventions and discoveries made by me, made under my direction, or otherwise known to me resulting from the work conducted under this grant, contract, research study, or collaboration effort. For more information, visit The Office of Commercialization and Innovation. [★]

I agree

What is the likelihood of an invention, discovery, or other forms of intellectual property resulting from this project or engagement? [★]

Highly Possible
 Somewhat Possible
 Not Expected

(ii) Human Subjects – Please complete this section. The information provided here will help us assess any contractual requirements involving human subject research.

Human Subjects

Will there be any collection of data from human subjects through interaction or intervention, including interviews, experimentation, assessment, etc.? or will there be the use of private, identifiable information, including data or biological specimens? * ?

Yes No

Is IRB approval required? *

Yes No

(iii) Export Controls – Please complete this section. The information provided here will help us assess any contractual requirements for project subject to export control laws and regulations.

Export Controls

If you answered "yes" to any of the questions, please provide the details and attach appropriate documentation. For more information on export controls, visit UTSA's Office of Research Integrity – Export Controls.

Will the project/discussion involve participation, collaboration or access to information by foreign nationals (individuals with foreign citizenship), foreign governments, foreign associations and corporations, or foreign political parties? * ?

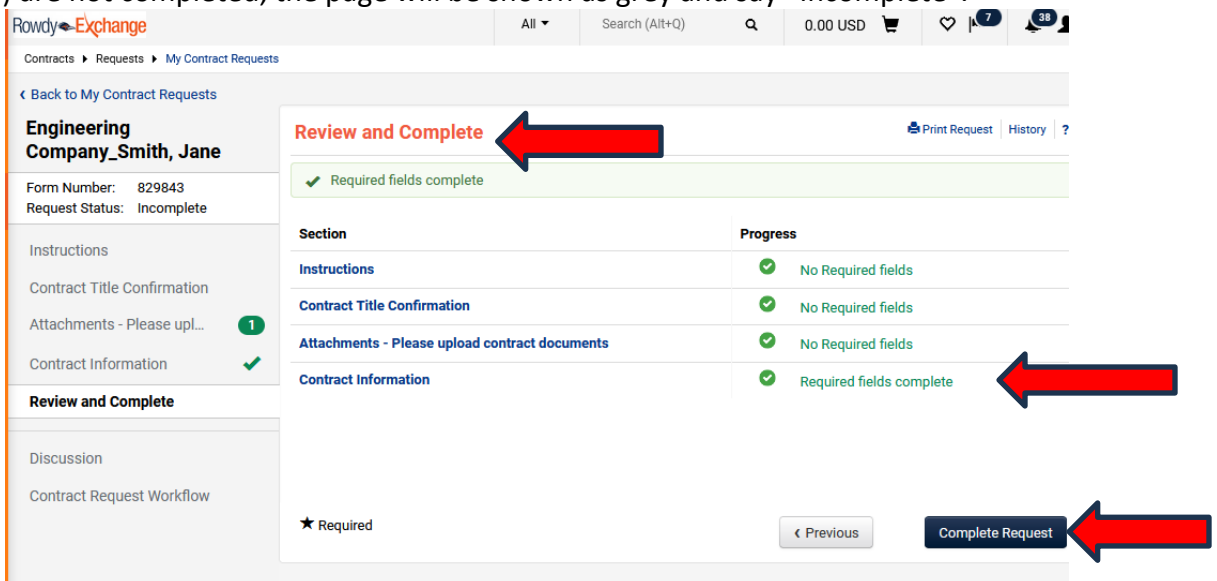
Yes No

Will the project/discussion involve the international shipment of equipment, technology, software, materials data or other information? *

Yes No

Note: Please remember that your selection under the “Funding Consideration” section for either a “Financial” or “Non-Financial” contract will trigger other fields within the request. The same is true for your selection of “Type of Agreement”.

3.6.12 Revise and Complete Page. Once all the Required Fields are completed, the Review and Complete page will show green check marks that will say “No Required Fields” and “Required Fields Complete” if all the required information has been provided. 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”.



Rowdy Exchange | All | Search (Alt+Q) | 0.00 USD | 7 | 38

Contracts > Requests > My Contract Requests

[Back to My Contract Requests](#)

Engineering Company_Smith, Jane

Form Number: 829843
Request Status: Incomplete

Instructions

Contract Title Confirmation

Attachments - Please upl... 1

Contract Information ✓

Review and Complete

Discussion

Contract Request Workflow

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

✓ Required fields complete

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](#)

Review and Complete

All sections with required fields must be complete before you can complete your request

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

3.6.13 Submit Request. Click *Complete Request* to submit the Contract Request. The Contract Request will be submitted and shown as “Under Review”.


The screenshot shows the Rowdy Exchange interface. At the top, there is a navigation bar with 'Rowdy Exchange' and a search bar. Below the navigation bar, a success message is displayed: 'Success Contract Request Submitted' with a green checkmark icon. A red arrow points to this message. Below the message, the 'My Contract Requests' section is visible, with a 'Filter Contract Requests' link and a 'Create New Contract Request' button. At the bottom, a table lists contract requests. A red arrow points to the 'Under Review' status in the table.

Engineering	* Research & Sponsored Programs	Jessica Fernandez	Under Review	Research Sponsored Programs	-	8/21/2023 12:02 PM	8/21/2023 10:30 AM	Actions
Company_Smith, Jane								

Note: A Submitted Contract Request means that the CIA team has received your request, but it does not mean that the Contract Request has been approved. The assigned Contract Negotiator reviewing your request will contact you if there are any questions or missing information. If the Contract Request is complete, then the Contract Negotiator will approve the Contract Request to start working on the Contract File.

4. Additional Options for Navigating the Screens in the Contract Request. As detailed above, completing the Contract Request requires moving through different screen pages based on the selections and information you provide, like the funding consideration and type of agreement. The required fields will pop up based on your completion of the request.

4.1.1 Contract Request Screens. The screen pages are listed on the left side of the screen and are labeled as follows: *Instructions, Contract Title Confirmation, Attachments, Contract Information, Review and Complete, Discussion, and Contract Request Workflow*. To navigate between screens, you can use the “Next” button, or you can go directly to the specific screen of the Contract Request by clicking on any of the titles on the left side of the page.



Instructions

Contract Title Confirmation

Attachments - Please up... 2

Contract Information ✓

Review and Complete

Discussion

Contract Request Workflow

Welcome to Total Contract Manager!

Below is some guidance to assist you with your research contract request.

The Contracts & Industry Agreements (CIA) team within the Office for Research, Economic Development, and Knowledge Enterprise (REDKE) supports UTSA faculty and in their efforts to advance the research enterprise by facilitating, drafting, negotiating, and executing a variety of contracts and agreements. For more information regarding CIA office, visit [Contracts & Industry Agreements](#).

Where to Begin

Financial Agreements. If you need help with an agreement that involves funding, the first step in the process is to work with your designated Research Service Center (RSC) see [Research Service Center Information](#). The RSC staff will assist you with the routing of the project proposal to receive institutional approvals. Once you receive the award the RSC staff will submit a contract request directly to our team through the TCM system. CIA will review and negotiate the appropriate contract with the other party. *Examples: Sponsored Research Agreement (SRA), Contract, and Task Orders.*

Non-Financial Agreements. If you need help with an agreement that does not contemplate the exchange of funding, you can submit the contract request directly to our team CIA, through the TCM system. You will need to provide the required information and documentation for the type of agreement requested. If you do not know the type of agreement you need, the CIA staff will help you make the determination based on the nature of the engagement. You will need to provide basic information regarding the type of agreement you need, the CIA staff will then draft and negotiate the appropriate agreement with the other party. *Examples: Material Transfer Agreement (MTA), Non-Disclosure Agreement (NDA), an Memorandum of Understanding (MOU).*

CIA staff will update the contract record on a regular basis, and you will be able to see the contract status in the TCM system.

As you complete this contract request, please note that "Other Party" means the sponsor funding the project, external research collaborator, or potential partner in the case of unfunded agreements.

Uploading Contract Attachments

Contracts and supporting documentation can be uploaded in the Attachment Page contained in this request form.


Please upload the contract document and supporting documentation as separate files and label the files accordingly.

If you are submitting any sponsor/partner generated contract documents, please upload a modifiable MS Word format.

Standard templates for commonly requested contracts are located on the Contracts & Industry Agreements website [CIA Standard Contracts & Agreement Templates](#).

Contract Timeline

The negotiation and execution of research contracts can take varying amounts of time to complete. It depends on several factors, including the timely provision of required


Next >

4.1.2 Save Progress. If you start completing a Contract Request but are unable to complete it, please remember you can save changes by clicking the "Save Progress" button at the bottom of the screen and return to the Contract Request a later date.

Print Request |
 History |
 ?

Contract Title Confirmation


Contract Request Name ★ Engineering Company Y_Smith, John_Project X

Template: Research & Sponsored Programs

Contract Type: -

Description: Research & Sponsored Programs contract request

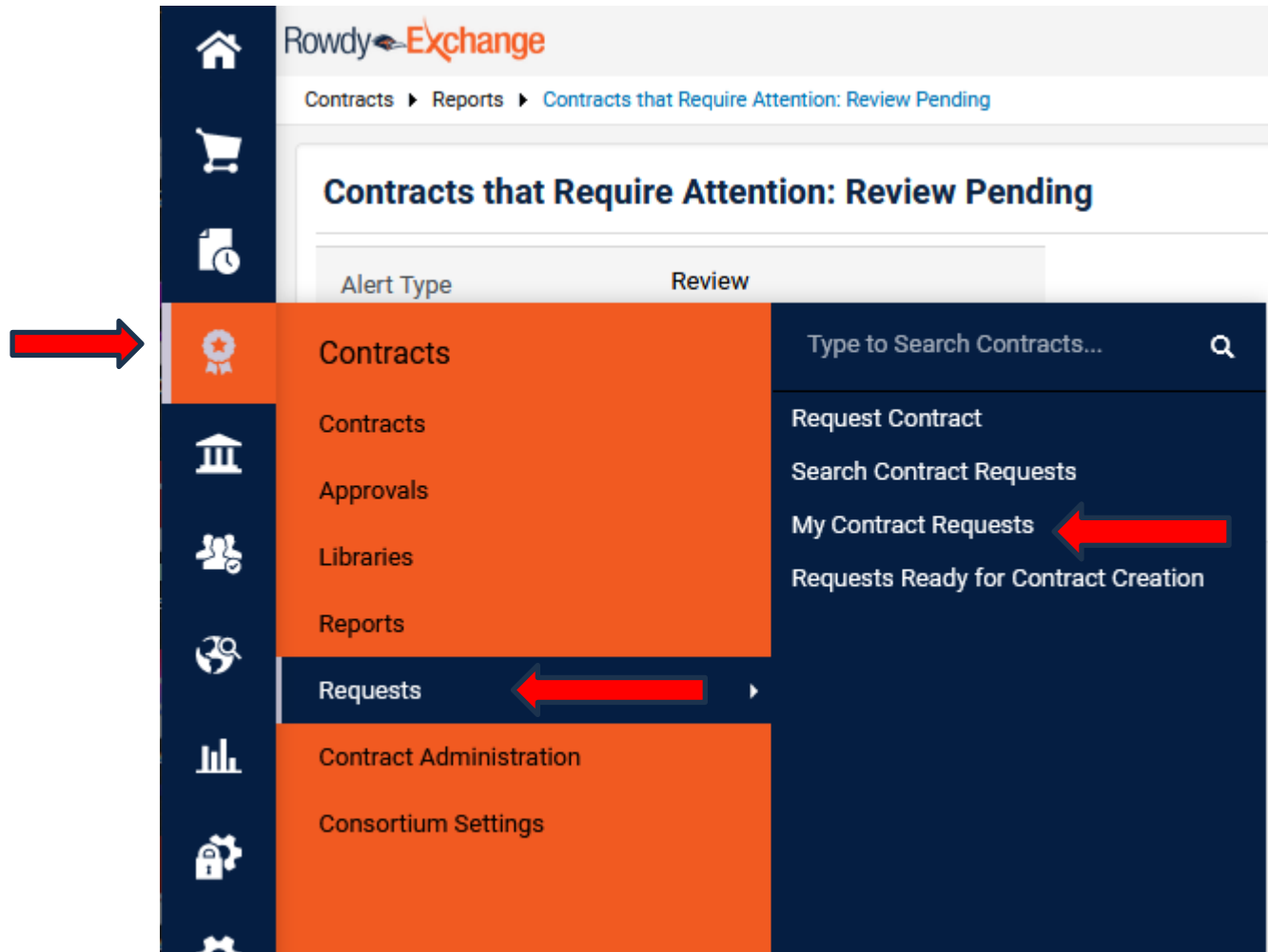
Contract Request Type: Create Contract



← Previous
Save Progress
Next >

5. Retrieving & Accessing Your Contract Request. Once you exit and come back into TCM-Rowdy Exchange, you can search and follow the status of your contract requests in multiple ways. Different methods of accessing your Contracts Request are described in more detail below.

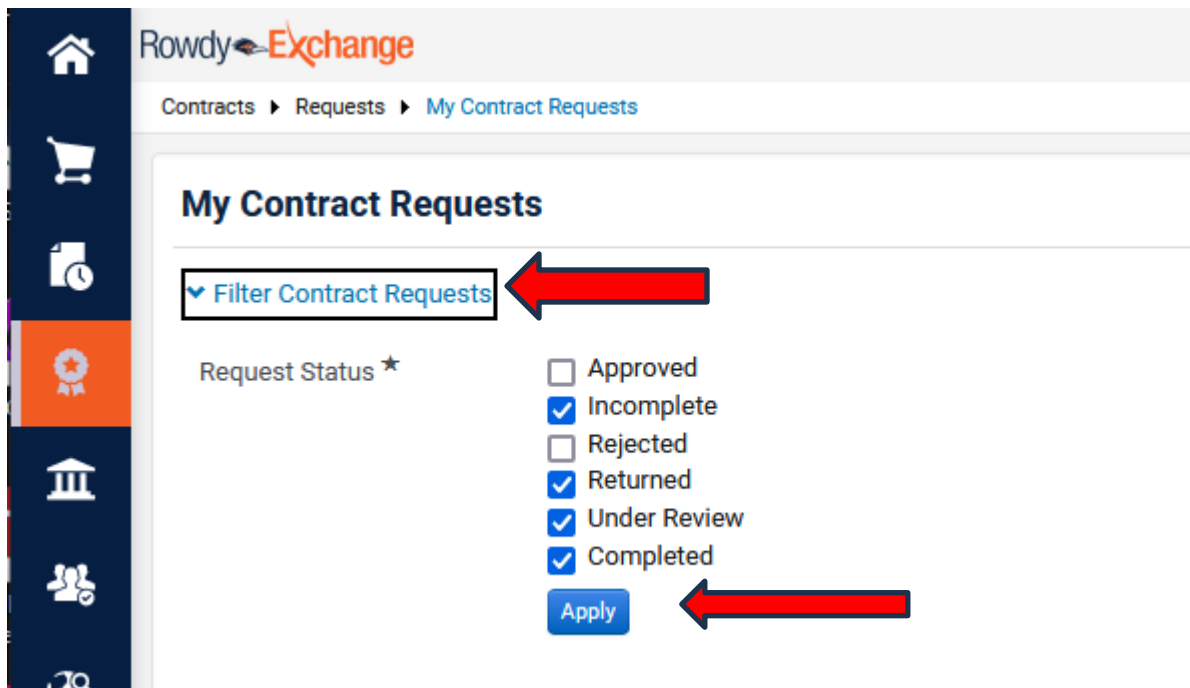
5.1 My Contract Requests. You can search by going to *My Contract Requests* through the Contracts icon (Medal/Ribbon) menu. If you click on *My Contract Requests*, a list of your Contracts Requests will be displayed and you can identify the Contract Request you are searching for.



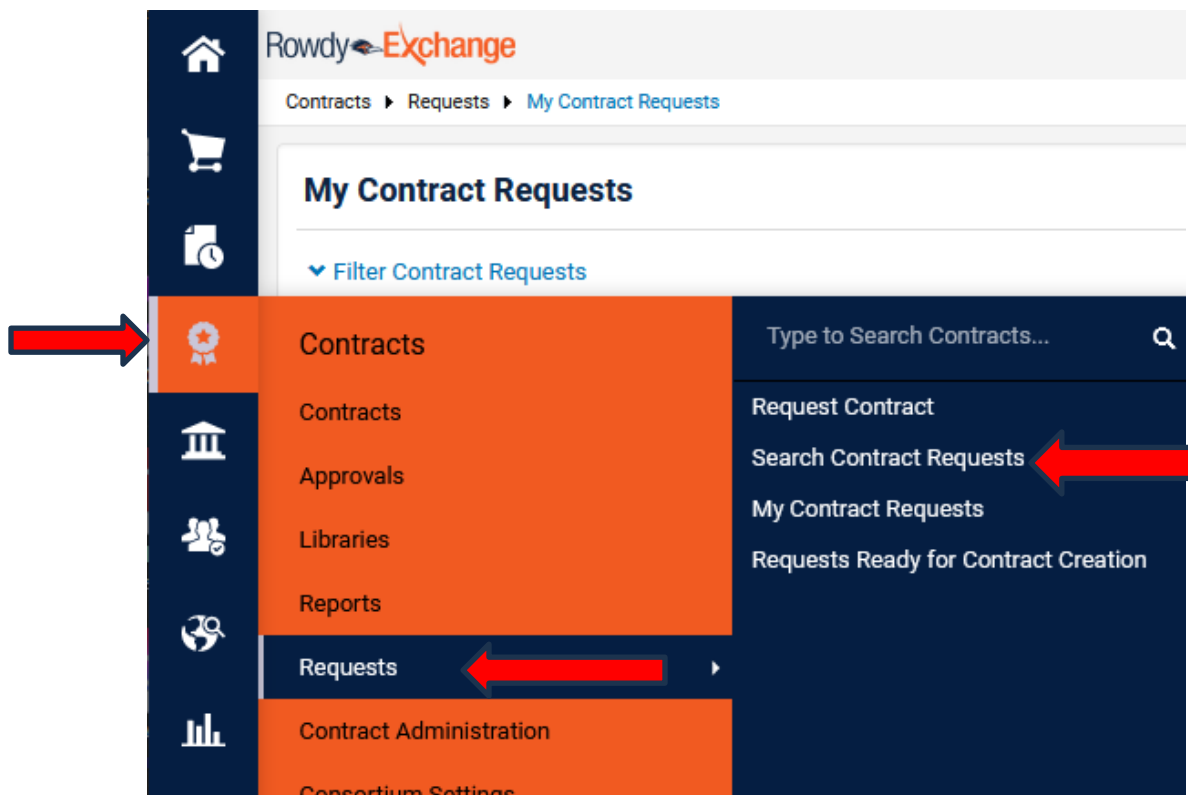
Nike Contract_Jane Smith	Research & Sponsored Programs	Jessica Fernandez	Incomplete	-	-	7/31/2023 10:33 AM	7/31/2023 10:33 AM	Actions
Cat in the Box	Research & Sponsored Programs	Jessica Fernandez	Incomplete	-	-	8/18/2023 1:43 PM	8/18/2023 1:43 PM	Actions
Wingspan_Lauren Benet	Research & Sponsored Programs	Jessica Fernandez	Incomplete	-	-	8/1/2023 3:01 PM	8/1/2023 3:01 PM	Actions

Page 1 of 2 1-50 of 74 Results 50 Per Page

If needed, you can filter your Contract Requests by clicking on the *Filter Contract Request* option and selecting the appropriate criteria for your search. If you are searching for “Incomplete Contract Request” that you want to return to, then select only that option and click the *Apply* to see those Contract Requests.



5.2 Form Number. You can search by going to *Search Contract Request* through the Contracts icon (Medal/Ribbon) menu and entering the specific Form Number for the Contract Request you are searching. You can also search by other identifiers, like sponsor name, or add other filters to the search.



Search Contract Requests

Save As Pin Filters

Quick Filters My Searches

Created Date: Last 90 days 828248

Form Name	Request Number	Form Status	Created Date/Time	Template Name	Current Workflow Step	Pending Approver	Requestor
Catan Corp	828248	Incomplete	8/16/2023 3:54:37 PM	* Research & Sponsored Programs	-	-	Jessica Fernandez

Created Date: Last 90 days catan

Form Name	Request Number	Form Status	Created Date/Time	Template Name	Current Workflow Step	Pending Approver
Catan	830330	Incomplete	8/23/2023 9:14:23 AM	Research & Sponsored Programs	-	-
Catan Expansion	830023	Completed	8/21/2023 4:12:31 PM	* Research & Sponsored Programs	-	-
Catan Corp	828248	Incomplete	8/16/2023 3:54:37 PM	* Research & Sponsored Programs	-	-

Find search filter...

Available Filters

- Approved By
- Approved Date
- Completed Date
- Current Workflow Step
- Form Status
- Form Name
- Last Modified
- Participant
- Pending Approver
- Request Number

5.3 From the Contract Requester Dashboard. If you have your Contractor Requester Dashboard set up (ref. [Section 8](#)), go to *Contracts Home* and click on *My Contract Requests* in the Quick Links menu. A list of your Contract Requests will be displayed.

Rowdy Exchange

Dashboards • Contract Requester Dashboard

Accounts Payable Dashboard Admin Dashboard BCO Business Contracts Dashboard **Contract Requester Dashboard** Contracts+

Quick Links

Use "Search Documents" to look up your Contract Requests and "Search Contracts" to find contracts.

[My Contract Requests](#)

[Search Contracts](#)

[Request Contract](#)

Contract Search

Search

[Search Contract Parties](#) [Advanced Search](#)

Document Search

All Orders Document Numbers, Supplier, Product Information

SHORTCUTS

[My Requisitions](#)

My Contract Requests

Filter Contract Requests Create New Contract Request

1-25 of 25 Results 100 Per Page

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
Engineering Company_Smith, Jane	Research & Sponsored Programs	Jessica Fernandez	Approved	-	-	9/1/2023 8:39 PM	8/21/2023 10:30 AM	Actions
Catan Expansion	Research & Sponsored Programs	Jessica Fernandez	Completed	-	-	8/21/2023 4:39 PM	8/21/2023 4:12 PM	Actions

6. Difference between Contract REQUEST & Contract FILE; Viewing the Contract File

6.1 Contract Request “flipped” into Contract File. CIA staff will review your contract request and if all the required information and documents are complete in the request, CIA will “flip it” into a Contract File. Once CIA flips your contract request into a Contract File, your contract request will show as “Completed” as displayed below. This means CIA has taken action on your request and created a contract file to start the contract review and negotiation stage.

6.2 Securing a Contract Number and Viewing Contract File. You will be able to access the Contract File from your Contract Request. Once CIA flips your request into an actual contract file, a contract number will be created. The contract number will be shown in your Contract Request on the left side of the screen. The contract number will include letters at the beginning that indicate the type of agreement. For example, “NDAMUT-2023-1” would be a Mutual Non-Disclosure Agreement, then you have the year and a system generated file number. 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 CIA) and monitor your contract status.

Rowdy Exchange Contract Search (Alt+Q) 0.00 USD

Contracts > Requests > My Contract Requests

Completed This Contract Request has been Completed. Request Actions

Catan Expansion

Form Number: 830023
Request Status: Completed
Contract: [RSA-2023-16](#)

Instructions

Contract Title Confirmation

Attachments - Please upl... 1

Contract Information ✓

Discussion

Contract Request Workfl...

Contract Request Workflow Print Request History ?

Show skipped steps

Orientation: Horizontal

Submitted 8/21/2023 4:31 PM → **Research Sponsored Programs** Approved ✓
✓ Jessica Fernandez → Completed 8/21/2023 4:37 PM

★ Required

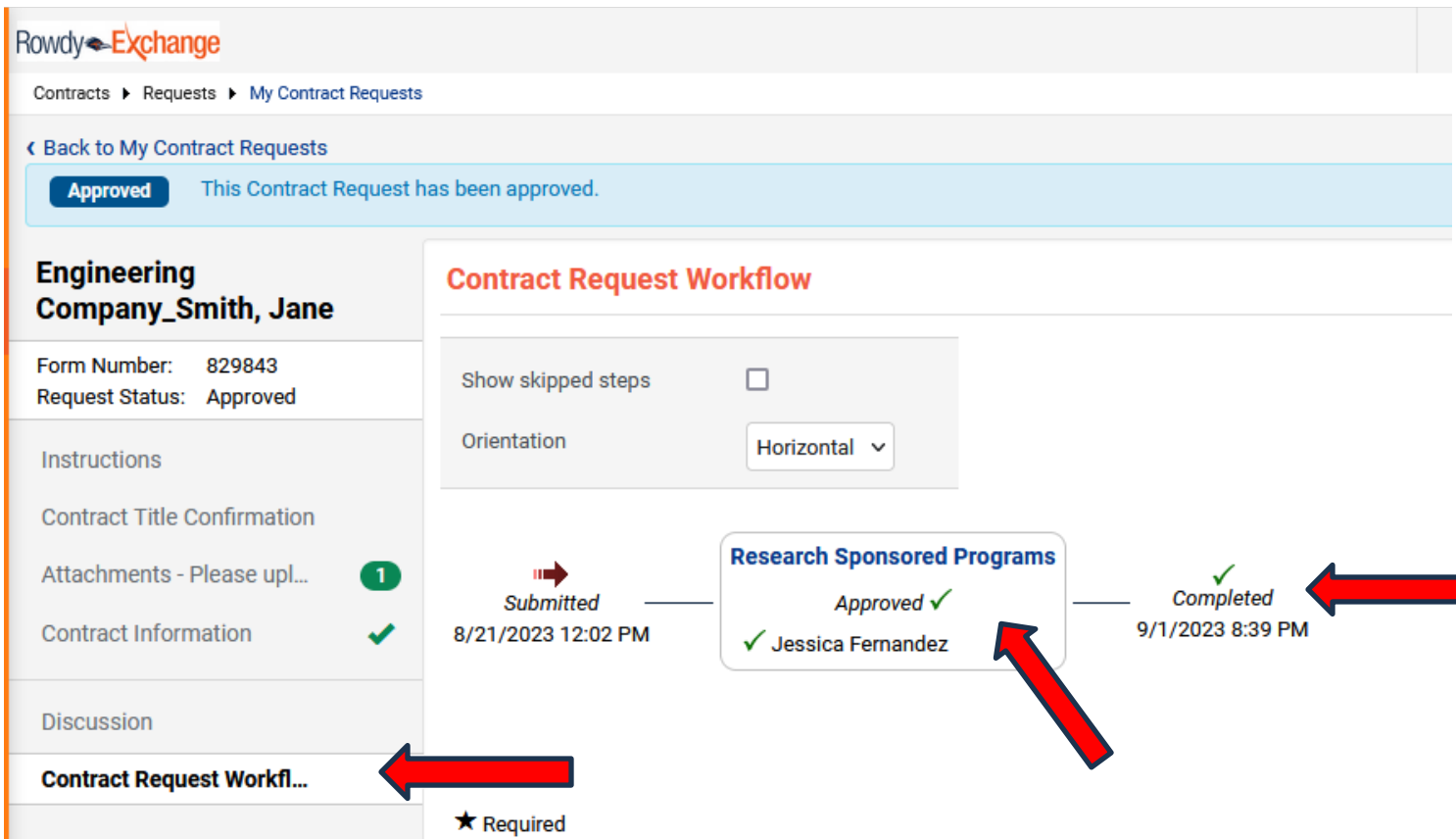
If you are the contract requester, you can also monitor your Contract Request by clicking on *Contract Request Workflow* on the left-hand menu. For example, if you are a UTSA researcher and you need an

MTA, Non-Financial Agreement, you can submit the contract request directly, or you could ask your Lab Assistant to submit the MTA request on your behalf. If the latter, then your Lab Assistant will be the contract requester and he or she will be the one with access to the Contract *Request*. Once the Contract *Request* is turned into a Contract *File*, CIA staff will add you, Principal Investigator, as a *Stakeholder* to the Contract *File* and you will also have access to the file to monitor the contract status.

Note: A Completed Contract Request does not equal an executed contract. This means that CIA has created a Contract *File* to work on the contract review and negotiation.

6.3 Timeline for Review of Contract Request and Flipping of Contract Request Into Contract File.

Once you have submitted your Contract Request, CIA will assign a Contract Negotiator to your Contract Request within 1-2 business days. The Contract Negotiator will review your request in detail within 1-2 business days and will contact you if any information and/or documents are missing. Once CIA has all the needed information and documents, CIA will approve the Contract *Request* and flip it into a Contract *File*. The complete negotiation and execution timeline will vary depending on a number of factors, including the type of agreement, type of sponsor, and the nature and complexity of the project.



Rowdy Exchange

Contracts ▶ Requests ▶ My Contract Requests

◀ Back to My Contract Requests

Approved This Contract Request has been approved.

Engineering Company_Smith, Jane

Form Number: 829843
Request Status: Approved

Instructions

Contract Title Confirmation

Attachments - Please upl... **1**

Contract Information **✓**

Discussion

Contract Request Workfl...

Contract Request Workflow

Show skipped steps

Orientation: Horizontal ▾

Submitted 8/21/2023 12:02 PM

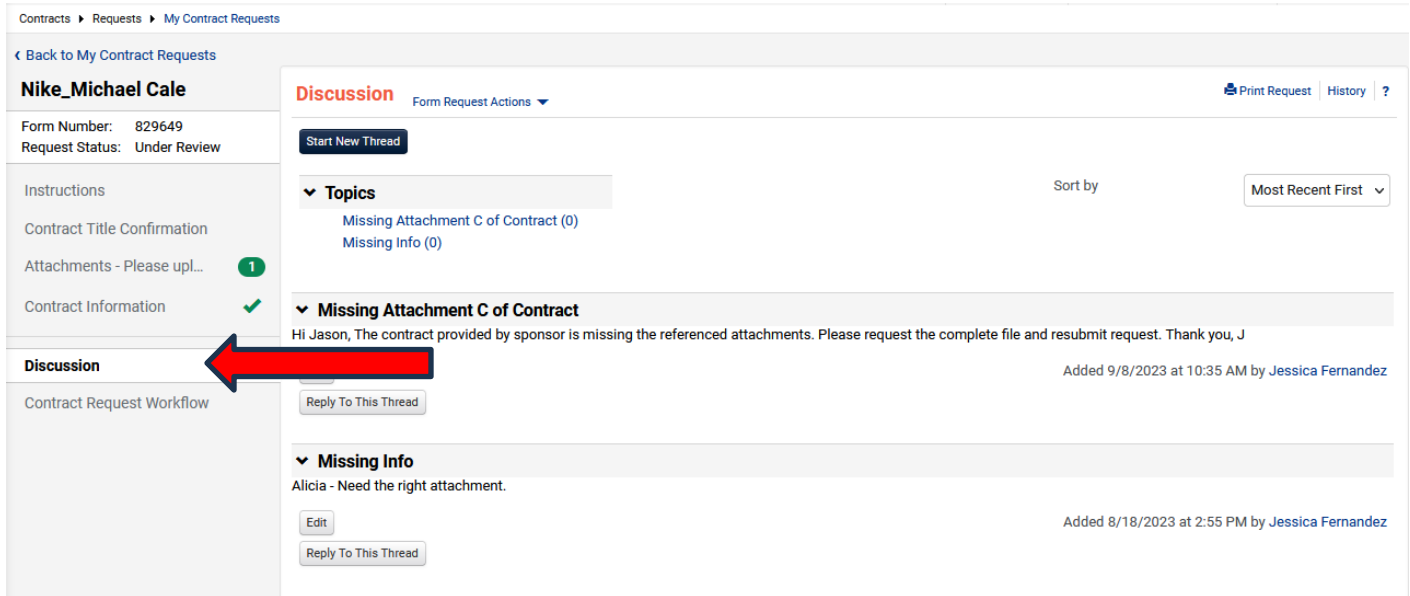
Research Sponsored Programs

Approved ✓
✓ Jessica Fernandez

Completed 9/1/2023 8:39 PM

★ Required

7. Contract Request Discussion Page. The Discussion 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 CIA, click on the *Discussions* page on the left hand menu. CIA staff will be able to see your Message and reply within the system.



Contracts > Requests > My Contract Requests

Back to My Contract Requests

Nike_Michael Cale

Form Number: 829649
Request Status: Under Review

Instructions

Contract Title Confirmation

Attachments - Please upl... **1**

Contract Information **✓**

Discussion

Contract Request Workflow

Discussion Form Request Actions

Print Request | History | ?

Start New Thread

Sort by Most Recent First

Topics

- Missing Attachment C of Contract (0)
- Missing Info (0)

Missing Attachment C of Contract

Hi Jason, The contract provided by sponsor is missing the referenced attachments. Please request the complete file and resubmit request. Thank you, J

Added 9/8/2023 at 10:35 AM by Jessica Fernandez

Reply To This Thread

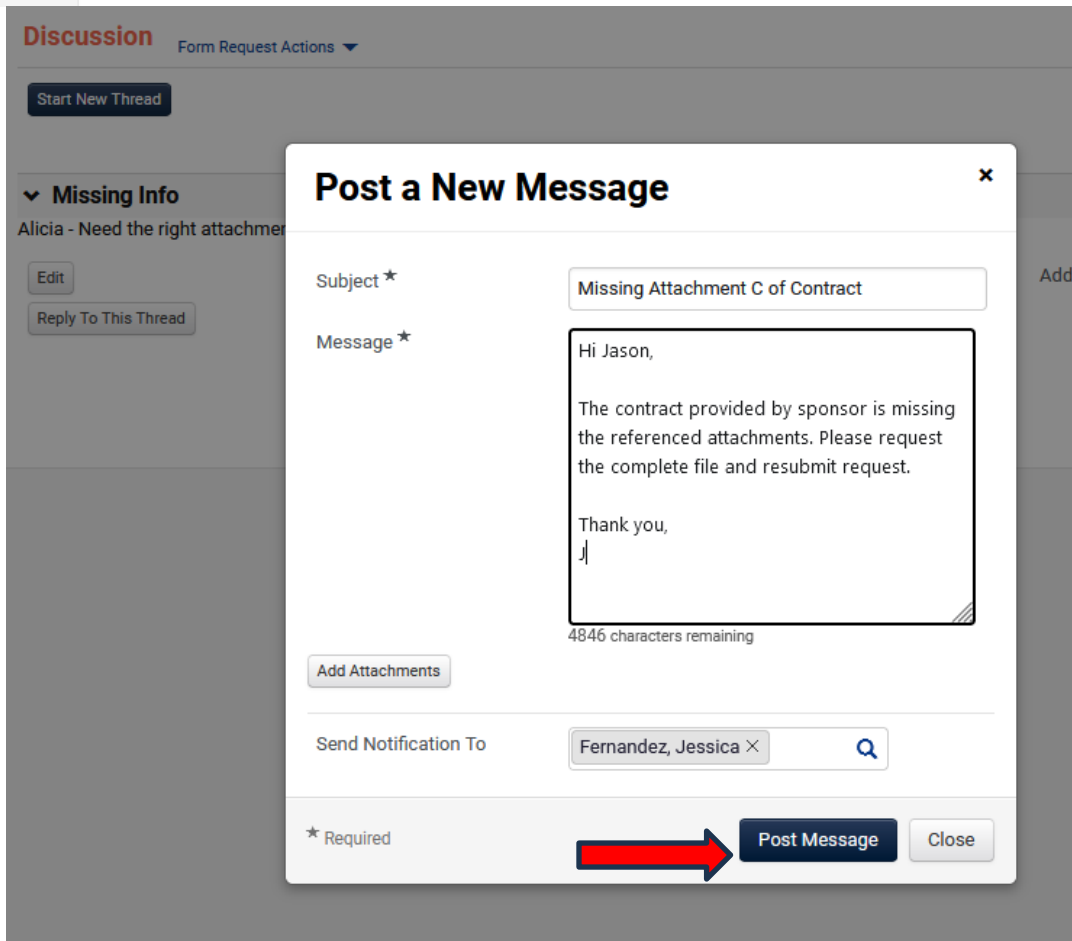
Missing Info

Alicia - Need the right attachment.

Edit

Added 8/18/2023 at 2:55 PM by Jessica Fernandez

Reply To This Thread



Discussion Form Request Actions

Start New Thread

Missing Info

Alicia - Need the right attachmer

Edit

Reply To This Thread

Post a New Message

Subject * Missing Attachment C of Contract

Message * Hi Jason,
The contract provided by sponsor is missing the referenced attachments. Please request the complete file and resubmit request.
Thank you,
J|

4846 characters remaining

Add Attachments

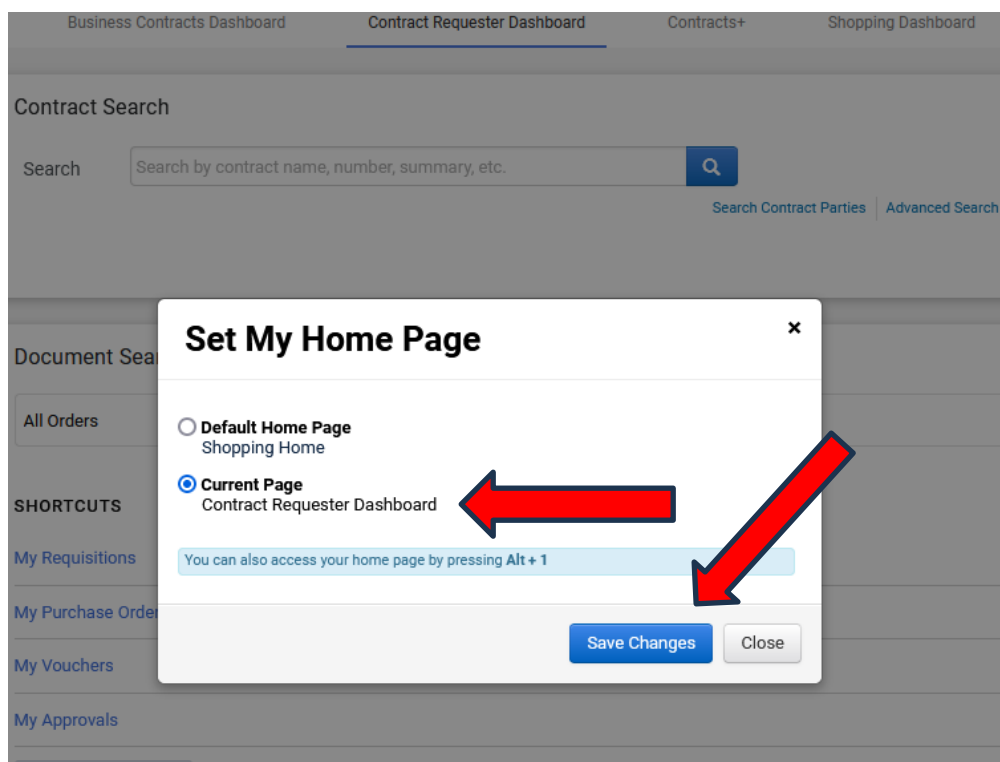
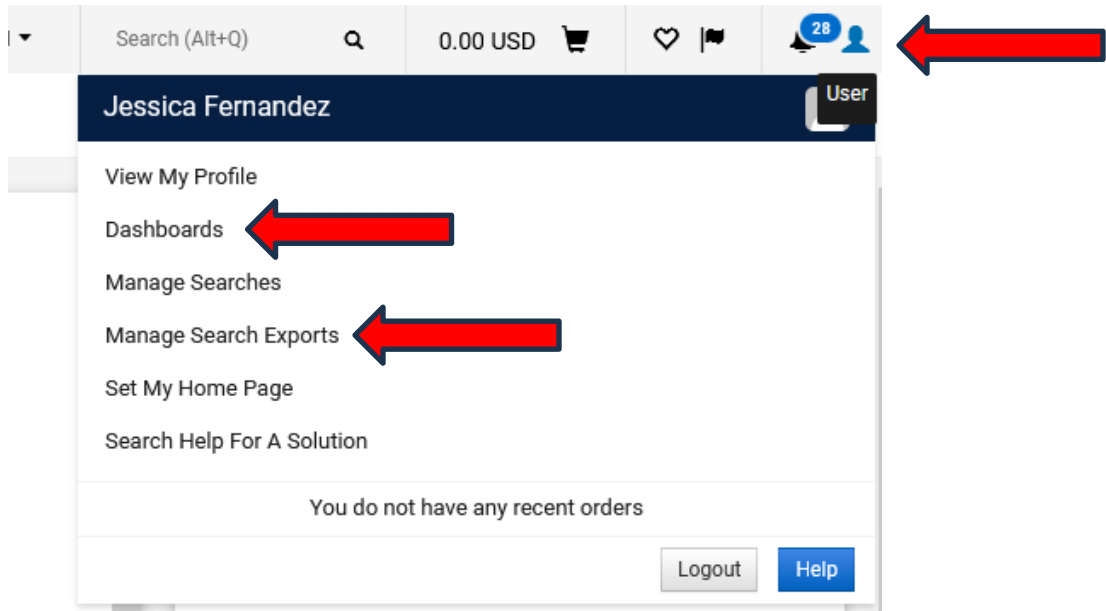
Send Notification To Fernandez, Jessica

* Required

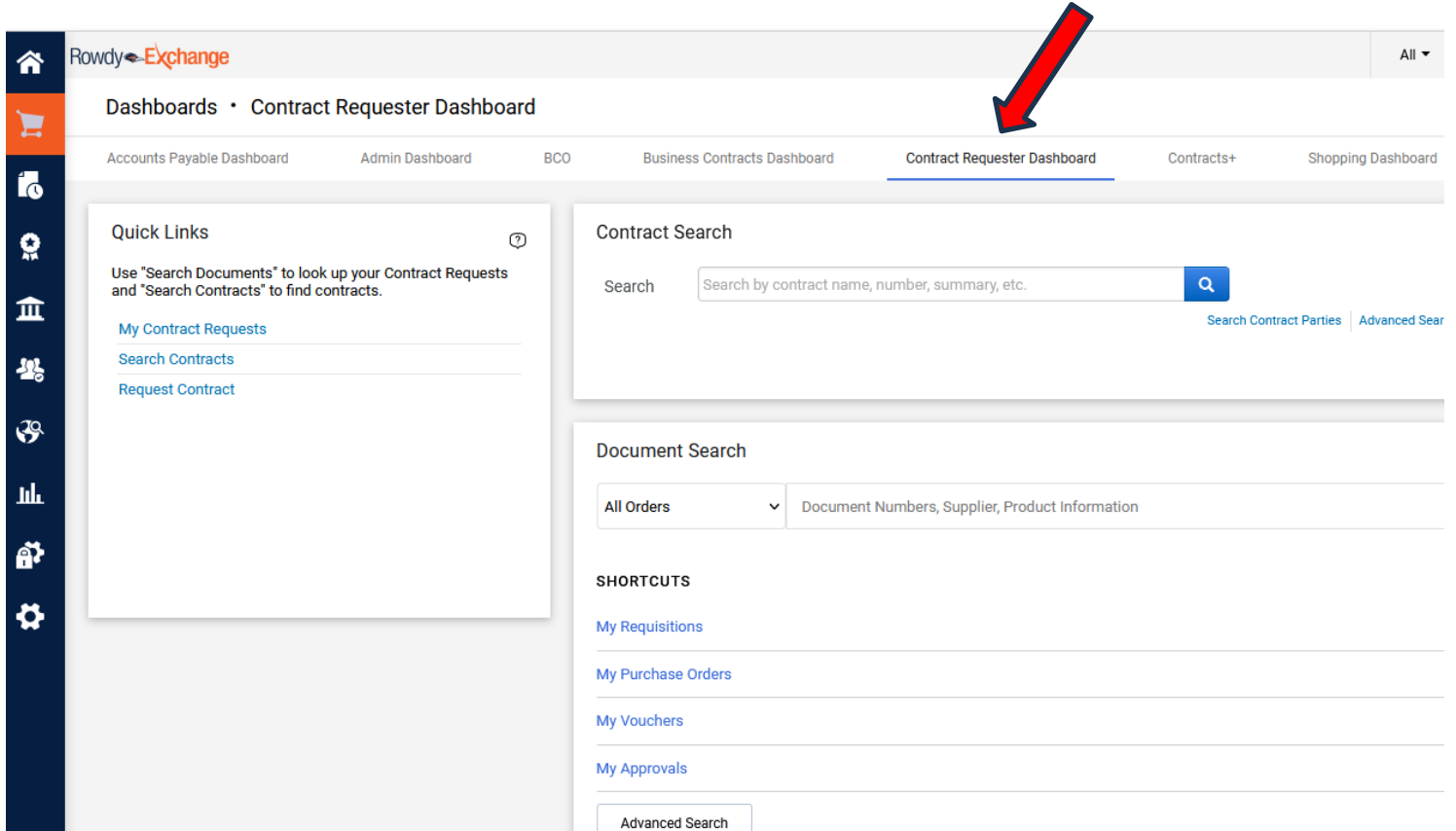
Post Message Close

8. Setting your TCM- Rowdy Exchange Home Page to the Primary TCM Site (*Contracts Dashboard*). The *TCM Contract Dashboard* site is the primary TCM home page. To view the Dashboards you have access to, click on you User icon and then click on *Dashboards*.

To change your TCM home page, click on the dropdown arrow beside your name again and click “*Set My Home Page*”. Set the “*Contract Requester Dashboard*” as your Home Page and click “*Save Changes*”. Anytime you wish to return to the Home Page, select the house icon on the top left side of the screen.



Contract Requester Dashboard. From this Dashboard, you can search for Contracts that have been created from the Contract Requests you have 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.

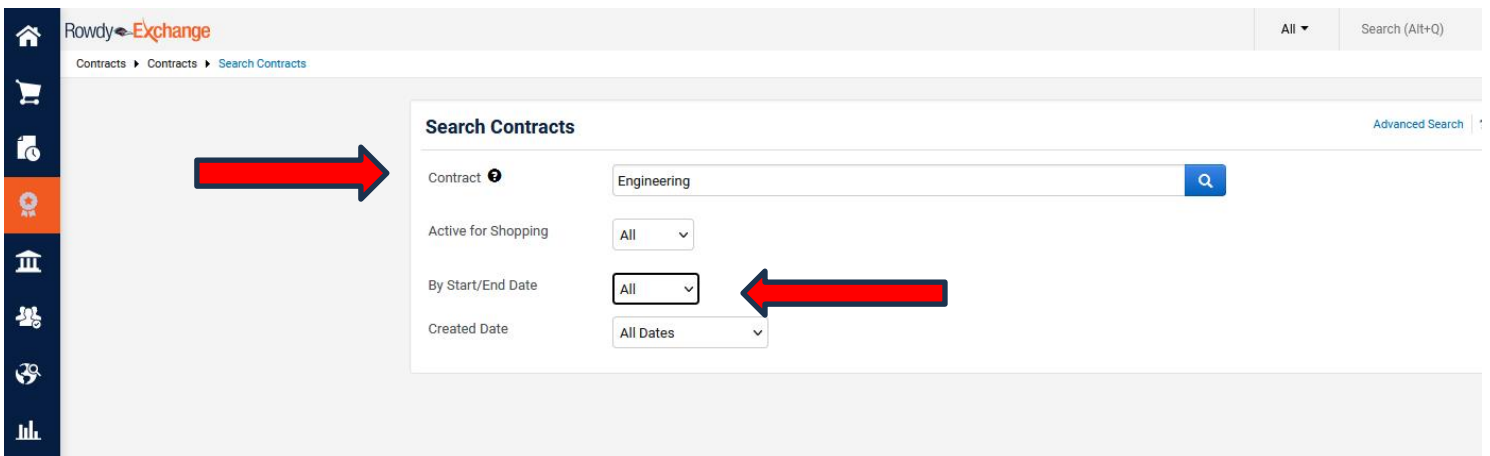
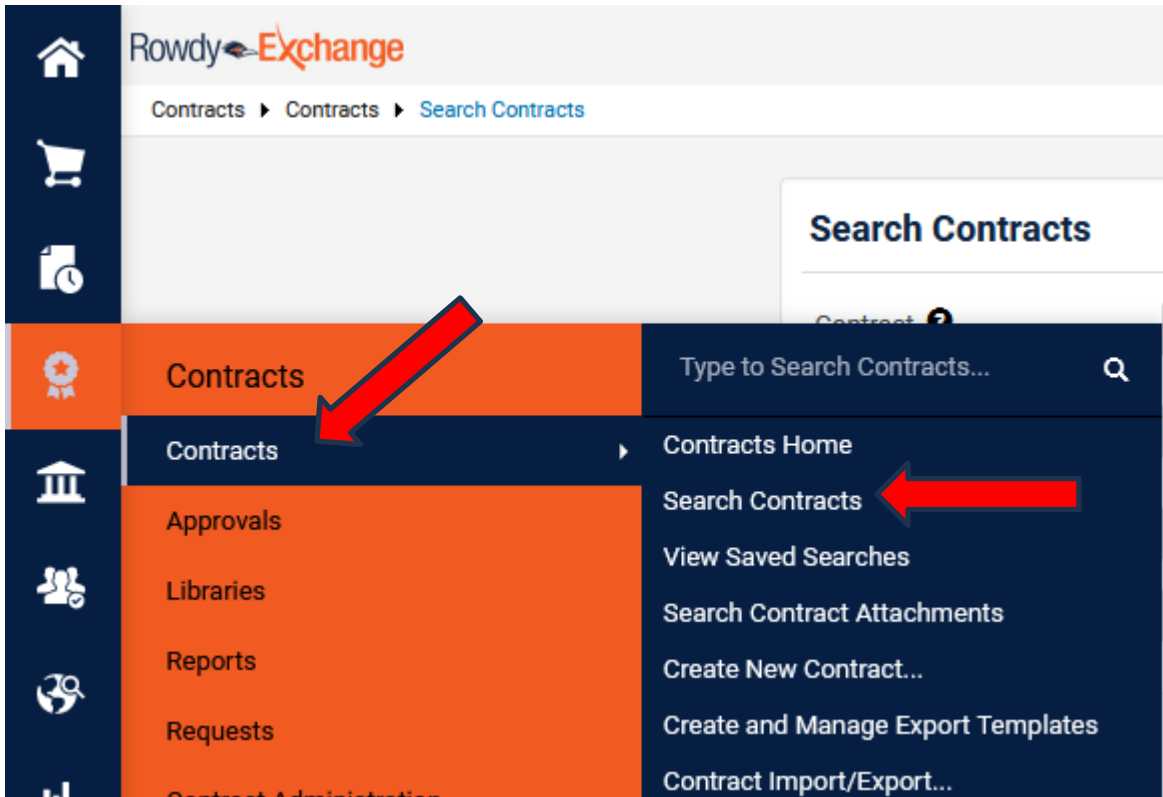


The screenshot shows the Rowdy Exchange interface. At the top left is the Rowdy Exchange logo. Below it is a navigation bar with several tabs: Accounts Payable Dashboard, Admin Dashboard, BCO, Business Contracts Dashboard, **Contract Requester Dashboard** (highlighted with a red arrow), Contracts+, and Shopping Dashboard. On the left side, there is a vertical sidebar with various icons. The main content area is divided into several sections:

- Quick Links:** A box containing instructions: "Use 'Search Documents' to look up your Contract Requests and 'Search Contracts' to find contracts." Below this are three links: "My Contract Requests", "Search Contracts", and "Request Contract".
- Contract Search:** A search bar with the placeholder text "Search by contract name, number, summary, etc." and a search button. To the right of the search bar are links for "Search Contract Parties" and "Advanced Search".
- Document Search:** A section with a dropdown menu set to "All Orders" and a search field containing "Document Numbers, Supplier, Product Information".
- SHORTCUTS:** A list of links: "My Requisitions", "My Purchase Orders", "My Vouchers", and "My Approvals".
- Advanced Search:** A button located at the bottom of the shortcuts section.

9. Search Your Executed and Approved Contracts. TCM-Rowdy Exchange provides users the ability to search for your existing contracts as well contracts that have been approved by CIA but are pending final signature. To search for a specific 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 are searching for a certain contract and you know the basic contract information, such as title, number, or summary. CIA recommends selecting the “All” option for the *Start/End Date field*.



After entering the information, click on the magnifying glass and TCM will display your contracts meeting your search criteria. Click on the Contract number to see the contract.

The screenshot shows the 'Contract Search Results' page. On the left, the 'Search Details' section includes 'Search Terms' (Engineering), 'Filtered by' (By Start/End Date), and 'Active for Shopping' (All). A red arrow points to the 'By Start/End Date' filter. The 'Contract Search Results' section shows two results: '2023-13369' and '2023-13235'. Each result includes details like 'Second Party', 'Contract Type', 'Start Date', 'End Date', 'Version Type', 'Renewal No.', 'Amendment No.', and 'Status'.

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 'Search Contracts' page. The 'Contract' field contains 'Engineering'. Below it are dropdown menus for 'Active for Shopping' (All), 'By Start/End Date' (All), and 'Created Date' (All Dates). A red arrow points to the 'Advanced Search' link in the top right corner.



If you have contract specific information, you can search by Contract Number, Contract Title, or other identifying information.

If you do not have or remember your contract information, you can search using any of the options in Advanced Search in any combination.

For example, you can select “Any” under Contract Manager, and “Me” under Contract Stakeholder, and then click on “Search”. If you submitted the Contract Request or are identified in the Contract Request as the Principal Investigator, you will be considered a Contract Stakeholder and will be able to view the Contract File.

Search Contracts - Advanced

[Simple Search](#)

Contract Number	<input type="text"/>	Second Party	<input checked="" type="radio"/> Any of <input type="radio"/> All of
Contract Title	<input type="text"/>	Work Group	<input type="text"/> <input type="button" value="Q"/>
Keywords	<input type="text"/>	By Start/End Date	All <input type="button" value="v"/>
Contract Type	<input type="text"/> <input type="button" value="Q"/>	Created Date	All Dates <input type="button" value="v"/>
Contract Status	<input type="text"/> <input type="button" value="Q"/>	Approvals Completed	All Dates <input type="button" value="v"/>
Contract Version Type	<input type="button" value="v"/>	Scheduled Termination Date	All Dates <input type="button" value="v"/>
Contract Manager	<input checked="" type="radio"/> Any <input type="radio"/> Me <input type="radio"/> Pick... 	Contract Term Extended	<input type="button" value="v"/>
Contract Stakeholder	<input type="radio"/> Any <input checked="" type="radio"/> Me <input type="radio"/> Pick... 	Include Archived	No <input type="button" value="v"/>
Summary	<input type="text"/>	Contract Ended Early	<input type="button" value="v"/>
		Jurisdiction	<input type="text"/> <input type="button" value="Q"/>

[Expand All](#) | [Collapse All](#)

- [> Contract Value](#)
- [> Contract Party Options](#)
- [> Custom Contract Fields](#)
- [> Renewal](#)
- [v eProcurement](#)



10. Support. Please feel free to contact our office if you have any questions, via email at: vpr-ocia@utsa.edu or call us at 210-458-6575. You can also visit our website [Contracts & Industry Agreements](#) for additional guidance.