IN THIS GUIDE, LEARN HOW TO:

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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
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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](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:


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.
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.

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*. 
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.
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.
(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.
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.

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.
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.
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.
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.
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](Image)

- 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](Image)

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**

<table>
<thead>
<tr>
<th>Amount</th>
<th>USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>150,000</td>
<td></td>
</tr>
</tbody>
</table>

**Payment type**

- Cost Reimbursable

**Indirect Cost Rate %**

<table>
<thead>
<tr>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
</tr>
</tbody>
</table>

**Was the indirect cost rate approved by UTSA?**

- Yes
- No
- Pending Approval

**RSC staff remarks on payment terms**

<table>
<thead>
<tr>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI requested monthly payments</td>
</tr>
</tbody>
</table>

#### 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.

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.

Check box

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.

Check box

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”.

- Instructions
- Contract Title Confirmation
- Attachments - Please upload contract documents
- Contract Information

Review and Complete

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

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.
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.
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 Contracts Requests*, a list of your Contracts Requests will be displayed and you can identify the Contract Request you are searching for.
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.
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.
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.

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.
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.
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.
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.

### 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**.

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.
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.