

LEGISLATIVE BUDGET BOARD

Contracts Database

Agency User Guide

LEGISLATIVE BUDGET BOARD STAFF

WWW.LBB.TEXAS.GOV

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LEGISLATIVE BUDGET BOARD – CONTRACTS DATABASE
USER GUIDE

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INTRODUCTION

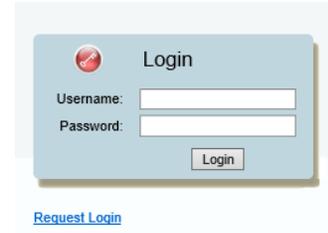
The Legislative Budget Board (LBB) transitioned to the Contract Management System (CMS) on September 1, 2018.

This document is a brief guide about how to use the CMS interface, including searching records, submitting new records, and amending existing records.

LOGIN

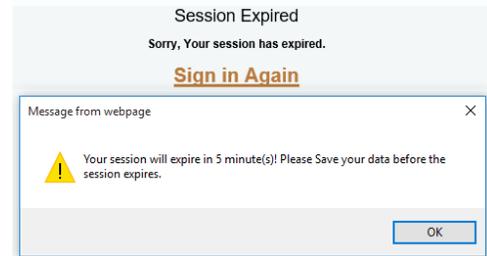
The login prompt is shown here:

New database credentials can be requested at
<https://loginreqagy.lbb.texas.gov/>



TIMING OUT

The interface improved system performance and prevented undue timing out of user accounts. **User sessions will expire after 15 minutes of inactivity.** The interface will give a five minute warning that the session is about to expire. After this period of inactivity, the system will automatically log the user out.



BROWSER COMPATABILITY

Internet Explorer or Google Chrome can be used for data entry. **Internet Explorer Version 11 is recommended.** Other browsers (e.g., Firefox, Safari, Microsoft Edge, etc.) will not function consistently. The recommended screen resolution is 1280x1024.

DATA FIELD DEFINITIONS

The existing data fields are used in the CMS interface. Those data fields are defined in the [Contracts Database Data Guide](#), and these definitions will display in the interface when hovering the cursor over a field.

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MAIN NEWS SCREEN

When logging in using existing credentials, the main News screen for the Contracts Database interface appears. This screen is the default dashboard for the interface.

Contract Management System (CMS Workflow) Welcome, tstagey5 Logout Help Contact Us

A. News
Search Contracts
Contract Reporting
Reports

C. [Help Icon]

B. Welcome, tstagey5 Logout Help Contact Us

D. Print

New contract reporting requirements for the 2022-23 biennium go into effect September 1st, 2021
General Appropriations Act 2022-2023, Article IX, Contract Reporting Requirements:

- Section 7.12 is now known as 7.11
- All contracts over \$10 million and non-competitive contracts over \$1 million must now be reported within 15 calendar days of contract award.
- Emergency contracts over \$1 million must now be reported within 5 calendar days of contract award.

Senate Bill 799 (87R):

- The dollar threshold for reporting construction, consulting, and professional services has been raised to \$50,000 (from \$14,000).

New contract reporting enhancements going into effect December 5th, 2022
Enhancement #1 of 4 - Meeting Reporting Timeframes

When submitting a Contract to the LBB, a check is now performed to verify that the Contract is being submitted within the expected timeframe as determined by the Reporting Code the Contract is being reported under. Each of the reporting codes has its own timeframe (typically 30 days after the Award Date). For example, if the Contract is being reported under the Reporting Code "Emergency Purchase > \$1 million", the Contract should be submitted to the LBB within 5 days of the Award Date. If the Contract you are submitting is beyond the timeframe, an informational message appears to remind you have exceeded the timeframe and in the future you need to submit within the timeframe. The message is only informational. It does not prevent you from submitting the Contract.

On this screen:

- A.** The main navigation menu;
- B.** Logout, Help, and Contract Us buttons, which appear on every page in the interface;
- C.** A help icon, which appears on every page in the interface; and
- D.** Important updates from LBB staff, which can be printed using the bottom right button.

MAIN NAVIGATION MENU

The main navigation menu is the primary tool for using the Contracts Database. When hovering over the Contract Reporting menu, a submenu will appear.

A. News
B. Search Contracts
C. **Contract Reporting**
Reports

D. Report New Contract
E. Contracts Pending Submission
F. Contracts Submitted to LBB
G. LBB Review Document Requests

These menu and submenu items enable a user to:

- A.** Return to the News Screen;
- B.** Search all contracts for a user's agency;
- C.** Hover over to open the submenu
- D.** Report a new contract
- E.** Access contracts pending submission;
- F.** Search submitted contracts to amend; and
- G.** Comply with LBB document requests (only when prompted by LBB staff).

SEARCH CONTRACTS

To search submitted contracts or saved but unsubmitted contracts, use the main navigation menu. Search Contracts also provides access to a submitted contract record to amend it.



From the main news screen, click the Search Contracts button to search all submitted and unsubmitted records.

This search enables a user to filter and see all of the contracts the user’s agency has entered in the Contracts Database.

SEARCH FILTERS

The system has several options to filter a search, including specifying a vendor, when the contract was awarded, and National Institute of Governmental Purchasing (NIGP) items that are a part of the record. **To see all submitted contracts, click the Search button without applying any filters.**

- Click SEARCH to get query result.
- Click CANCEL to return to previous screen.

Search Contracts -- Contracts Submitted to LBB

A search form titled 'Search Contracts -- Contracts Submitted to LBB'. It contains several input fields and dropdown menus: 'Contract ID' (text input), 'Agency' (dropdown menu with '_Select an Agency'), 'Vendor' section with 'Set Vendor List by Name (at least 3 characters):' (text input), 'Set Vendor List' button, and 'Vendor:' (dropdown menu). Below this is the 'Additional Filters' section with 'Fiscal Year:' (dropdown menu with '_Select a Fiscal Year'), 'Contract Award Date From:' (text input), and 'Contract Award Date To:' (text input). At the bottom is the 'NIGP Class:' (dropdown menu with '_Select an NIGP Class'). At the very bottom right are 'Search' and 'Cancel' buttons. A red box highlights the 'Search' button. A red arrow points from the text to the right of the form to the 'Search' button.

Use this to find a specific contract record.

1. Enter at least three characters;
2. Click Set Vendor List; and
3. Choose which vendor name to use as a filter.

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VIEWING SEARCH RESULTS

The results of a search will appear in a table based on the filters applied. The rows of the table represent separate contract records in the Contracts Database, and the columns provide additional details on each record.

This table features several tools to help organize the information, including:

- A. A sort feature to change the table’s display order;
- B. Indication of the record’s submission status;
- C. Navigation links to different pages of the search results; and
- D. An option to export the search results to Microsoft Excel.

Click on the magnifying glass icon to open the contract record in that row.



Search Contracts Bottom

Sort By: -Select Sort Item- ASC DESC

You are viewing page 1 of 97

Status	ID	Subject	Agency	Award Date	Vendor Name	Article	Current Value	Max Value
Submit to LBB	12345Sam	Sample Contract Subject	### - Sample Agency Name	09/01/2015	SAMPLE VENDOR NAME	02 - HEALTH & HUMAN SERVICES	\$100,000	\$200,000
Submit to LBB	12345Sam	Sample Contract Subject	### - Sample Agency Name	09/01/2015	SAMPLE VENDOR NAME	02 - HEALTH & HUMAN SERVICES	\$100,000	\$200,000
Contract in Editing	12345Sam	Sample Contract Subject	### - Sample Agency Name	09/01/2015	SAMPLE VENDOR NAME	02 - HEALTH & HUMAN SERVICES	\$100,000	\$200,000
Contract in Editing	12345Sam	Sample Contract Subject	### - Sample Agency Name	09/01/2015	SAMPLE VENDOR NAME	02 - HEALTH & HUMAN SERVICES	\$100,000	\$200,000
Contract in Editing	12345Sam	Sample Contract Subject	### - Sample Agency Name	09/01/2015	SAMPLE VENDOR NAME	02 - HEALTH & HUMAN SERVICES	\$100,000	\$200,000
\$TOTAL							\$TOTAL	\$TOTAL

Export to Excel Top

A.
B.
C.

D.

-Select Sort Item- ASC DESC

- Status
- ID
- Agency
- Award Date
- Vendor Name
- Article
- Subject
- Current Value
- Max Value

A. Sort Results: Each column of the table can be sorted in either ascending (ASC) or descending (DESC) order. Select ascending or descending, and specify a column to sort by. The sort works on both alphabetical and numerical values.

B. Submission Status: The Status column of the table indicates whether a contract record is submitted (Submit to LBB), or whether it is still in a saved/editing mode and is pending submission (Contract in Editing). **Only records marked Submit to LBB have been submitted to the system and reported to the LBB pursuant to statute and General Appropriations Act (GAA) requirements.** Submitted records are the only records eligible for new amendments.

D. Export to Excel: Click this button to download a Microsoft Excel spreadsheet containing all of the displayed data.

NAVIGATING A CONTRACT RECORD

Contract records are accessed through main navigation menu items on the News screen. When a contract record is opened, certain elements shared across the entire system appear:

- A. Summary info for the contract being entered;
- B. An expanded version of the navigation menu for accessing data entry pages;
- C. A file path that shows progress on each reporting step;
- D. Hover-over definitions for data entry fields; and
- E. Action items enable a user to save info and navigate between reporting steps.

The screenshot displays the 'Contract Management System (CMS Workflow)' interface. At the top, it says 'Welcome, tstag4' with 'Logout', 'Help', and 'Contact Us' buttons. Below this is a summary table (A) with fields for Agency, Contract, Vendor, Requisition Date, Award Date, Completion Date, Solicit. Post Date, Current Value, # Bids Received, Approval Date, Max. Amount, and Article. The status is 'Contracts in Editing - Agency Created Contract and Editing'. To the left is a 'Change Status' menu (B) with options: 1. Contract Info, 2. Requisition Info, 3. Vendor Info, 4. NIGP Info, 5. Attachments, -- Amendments, and Return to Workflow. The main content area shows a breadcrumb trail (C): 'Contract Info > Requisition Info > Vendor Info > NIGP Info > Attachments'. Below the breadcrumb is a warning message: 'Before submitting to LBB you must complete all entries on Contract Info, Requisition Info, Vendor Info, NIGP Info, and Attachments pages. All required data is marked with a red asterisk.' A large dotted text area (D) is present. At the bottom right is an action bar (E) with buttons: Save, Cancel, Clear Screen, Next, and Delete. The State of Texas seal is visible on the left side.

CONTRACT RECORD MENU

While visually similar to the main navigation menu, the expanded contract record menu only navigates around the specified contract record.

- Change Status ← The screen for submitting or amending a contract record
- 1. Contract Info ← Entry screen 1 for basic info
- 2. Requisition Info ← Entry screen 2 for solicitation and requisition info
- 3. Vendor Info ← Entry screen 3 to add a vendor
- 4. NIGP Info ← Entry screen 4 to designate all applicable NIGP codes
- 5. Attachments ← Entry screen 5 to add all required attachment PDFs
- Amendments ← Displays all amendments for this record
- Return to Workflow ← Returns to search results

To edit another record, click the Return to Workflow button to return to the search results.

FILE PATH

The file path acts as both a navigation aid and a tracker for data entry progress. Click on any of the steps to navigate to that particular entry screen.



A user's location within a given contract record is marked with an underline. When a reporting step is complete, it will display in green with a checkmark. The above image shows that a user is currently on the 1. Contract Info entry screen, and that this step has been completed.



Once the entire record is complete, all of the breadcrumb items will appear in green. This is an easy way to check if any required info is missing before submitting the record. The image above indicates that all the steps have been completed, and the user is on the last entry screen, 5. Attachments.

HOVER-OVER DEFINITIONS

If a user is uncertain what a data field means, hover the mouse cursor on top of the data entry box. A definition will pop up from the [Data Dictionary](#). A sample is shown to the right.

The Completion Date specifies the date by which a vendor must complete its performance pursuant to the terms of the contract, including amendments, and exercised renewals or extensions. Some contracts do not have a set completion date, but instead rely on other benchmarks. This information is needed to track the overall life of the contract, and the relationship between payments and performance.

* Completion Date:



ACTION ITEMS

These buttons are included in each entry screen, and are a user's main tools for managing data within that contract record. Most of the buttons execute a function only on that particular data entry screen. **The exception is Delete, which will discard the entire contract record.**

A. B. C. D. E.



- A. **Save** – Saves the data entered so far.
- B. **Cancel** – Undoes the last action taken, even the Clear Screen action.
- C. **Clear Screen** – Clears all of the data fields on that particular screen.
- D. **Next** – Advances to the next data entry step screen. All entered data is saved when advancing to the next screen.
- E. **Delete** – Deletes the entire contract record and all associated data. After clicking, the user will be prompted once more before the system deletes the record. **Only unsubmitted contract records can be deleted.**

REPORT A NEW CONTRACT

Click Report New Contract on the main navigation menu to begin the process of submitting a contract to the Contracts Database.

Contract reporting is conducted through smaller steps, which enables a user to save the data more often throughout the process and improves overall system performance. Each step in the reporting process is shown in a menu item, and it is tracked in the process file path that updates as a user progresses.

The following process steps show which data fields are associated with the reporting steps in the interface. These steps are based on the same fields from the previous web-based interface:

1.	2.	3.	4.	5.
CONTRACT INFO <ul style="list-style-type: none">• Contract Subject• Level of Competition• Contract Values• Reporting Codes• Agency Approval, Award, and Completion Dates• Fiscal Year Allocation	REQUISITION INFO <ul style="list-style-type: none">• Purchase Requisition Number• Purchase Category Code• Revenue Generating?• Number of Bids• Solicitation and Requisition Dates	VENDOR INFO <ul style="list-style-type: none">• Vendor name and address information	NIGP INFO <ul style="list-style-type: none">• All applicable National Institute of Governmental Purchasing (NIGP) class and item codes	ATTACHMENTS <ul style="list-style-type: none">• Contract and Solicitation documents, where applicable• Attestation letters as required by G.A.A., Article IX, Section 7.11

START WITH BASIC INFO

After a user clicks on Report New Contract, the system will prompt the user for some basic information before opening the new record:

- Which agency the user is reporting for (some users are responsible for multiple agencies);
- The Contract ID to assign to the contract; and
- A subject phrase that briefly describes the contract.

Report New Contract

A. Agency:

B. Contract ID: (Maximum 30 characters)

C. Subject: (Maximum 50 characters)

A new record will be initiated only after the user provides these three data points and clicks Save. After the user clicks the Save button, the system advances to the first contract entry screen.

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1. CONTRACT INFO

Upon initiating a record, the system will default to the 1. Contract Info screen. **After the user provides all required data, the action item buttons can be used to proceed.**

[Contract Info](#) > [Requisition Info](#) > [Vendor Info](#) > [NIGP Info](#) > [Attachments](#)

[Bottom](#)

Before submitting to LBB you must complete all entries on Contract Info, Requisition Info, Vendor Info, NIGP Info, and Attachments pages. All required data is marked with a red asterisk.

Amendment: 0 (Original Contract Info) Last Updated: 9/11/2023 1:52:17 PM Last Updated By: tstage1

*Subject:

* Was the contract competitively procured pursuant to the provisions of the State Procurement Manual?

* Current Value:

* Maximum Value:

Other Savings Opportunities:

* Report Codes: (select all that apply)

- Major Info Systems - General > \$100k (Sec 2054.008, Gov. Code)
- Major Info Systems - Institutions and Higher Ed > \$1 million (Sec 2054.008, Gov. Code)
- Construction > \$50k (Sec 2166.2551, Gov. Code)
- Professional Services > \$50k (Sec 2254.006, Gov. Code)
- Consulting Services > \$50k (Sec 2254.0301, Gov. Code)
- Purchases or Sales > \$50k (Sec 7.04, Article IX, GAA)
- Purchases > \$10 million (Sec 7.11, Article IX, GAA)
- Non-competitive purchases > \$1 million (Sec 7.11, Article IX, GAA)
- Emergency purchases > \$1 million (Sec 7.11, Article IX, GAA)
- Purchase of Care and Treatment by Texas Juvenile Justice Dept - All (Sec 2155.143, Gov. Code)

A. ****Note that more than one requirement may apply****

[Statute References](#)

* Agency Approval Date:

* Award Date:

* Completion Date: **D.** No Completion Date

* Fiscal Years Amounts **C.**

Fiscal Year	Amount
2024	\$0
2025	\$0
2026	\$0
2027	\$0
2028	\$0
2029	\$0
Fiscal Year Total:	\$0

B. **Current Contract Amount \$25,000,000 does not equal Fiscal Years Allocations sum \$0**

(note: The Sum of Fiscal Year Amounts must equal the Current Contract Amount)

Displays info about the contract record's edit history.

This links to the legal text for each requirement

Use action items to move to next step.

A. Reporting Code logic: Value thresholds for reporting contracts to the LBB are based on the Maximum Contract Value. After the user enters the Maximum Contract Value, the system automatically will check applicable Report Codes underneath. **Users are encouraged to review the selected codes and make sure all of the applicable codes are included.** Codes can be added or removed by clicking the adjacent checkbox, and multiple codes may apply to the record.

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B. Fiscal Year Allocation check: Like the previous Contracts Database interface, the user will be asked to allocate the total Current Contract Amount across fiscal years that the contract is active. The system will check if the Fiscal Year Allocation adds up to the Current Contract Value, and an error message will display if it does not.

C. Auto Fiscal Years Distribution: This button will appear after the contract’s value, award date, and completion date have been entered. Clicking on the button automatically will distribute the contract’s Current Value evenly across the Fiscal Years.

D. No Completion Date button: Like in the previous interface, the system gives a user the option of reporting a contract without a set Completion Date by clicking the No Completion Date checkbox next to the Completion Date field. **When the user selects this option, a text field will appear for the user to explain why the record has no Completion Date.** This explanation will not be displayed publicly.

* Agency Approval Date: 9/1/2015
* Award Date: 4/5/2016
Completion Date:
 No Completion Date
Fiscal Years Comments:
Use this box to explain why the record does not have a related Completion Date.

2. REQUISITION INFO

Clicking Next will take a user to the second step, where requisition and solicitation information is entered. Notice the file path at the top of the screen updates as steps are completed.

Contract Info ✓ > Requisition Info > Vendor Info > NIGP Info > Attachments

Bottom

Before submitting to LBB you must complete all entries on Contract Info, Requisition Info, Vendor Info, NIGP Info, and Attachments pages. All required data is marked with a red asterisk.

* Purchase Requisition# 12345 (Max 50 Characters)
* Purchase Category Code: **A.** A - Purchases of items from SPD term contracts using Texas SmartBuy. See Te
* Is this a revenue generated contract? Yes No
* # of Bids Received: 1
Solicitation Posting Date : Information Unavailable Not Applicable **B.**
* Please briefly explain why you do not have a Solicitation Date
* Requisition Date : 8/20/2023

Use this box to explain the selection. Please include statutory citations when possible.

Top

A. Use Contract ID# button: The system gives a user the option of using the record’s contract ID number as the purchase requisition number. This option assists agencies that do not use separate requisition identifiers. **If an agency uses a separate requisition identifier, please make sure to provide it.**

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B. Solicitation Posting Date - Not Applicable / Unavailable: Two buttons are available to denote nontraditional solicitations. Use Not Applicable if no solicitation is associated with the record. **Make sure to provide an explanation for the selection in the resulting text box.** The explanation will not be displayed publically after the record is submitted.

3. VENDOR INFO

The LBB receives nightly downloads from the Texas Comptroller of Public Accounts (CPA) to populate its vendor list. Search for the vendor with either the 14-digit Texas Identification Number (TIN), or by name using at least three characters.

Contract Info ✓ > Requisition Info ✓ > Vendor Info > NIGP Info > Attachments

[Bottom](#)

Before submitting to LBB you must complete all entries on Contract Info, Requisition Info, Vendor Info, NIGP Info, and Attachments pages. All required data is marked with a red asterisk.

Search Vendor by Vendor ID: Search by ID...

Search by Vendor Name (at least 3 characters): Search by Name...

9 matches found.

Select a Vendor

- SAMPLE ARCHITECTURE LLC 50 CROWN PL RICHARDSON TX 75080 214-2957215
- SAMPLE CATTLE COMPANY LTD 38 PRIVATE ROAD 722 LOHN TX 768526823 -
- SAMPLE ENTERPRISES INC 3020 E LOCUST ST LAREDO TX 780431429 -
- SAMPLE ENTERPRISES INC 3020 E LOCUST ST LAREDO TX 780431429 956-7271207
- SAMPLE ENTERPRISES INC 3020 E LOCUST ST LAREDO TX 780431429 -
- SAMPLE HOUSE & RESALE SHOP INC 4722 BENGAL ST DALLAS TX 752358008 -
- SAMPLE TECH INC 3901 W PARKER RD STE 810 PLANO TX 750238144 -
- SAMPLES ARTS 3543 RUTH ST HOUSTON TX 770045515 -
- SAMPLES JENNINGS RAY AND CLEM PLLC 130 JORDAN DR CHATTANOOGA TN 374216748 -

City:
State:
Postal Code:
Phone:

The system will display how many matches the search resulted in. **A user must then select one of the vendor options, and click Save or Next for it to be assigned to the contract record.**

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Contract Info ✓ > Requisition Info ✓ > Vendor Info ✓ > NIGP Info > Attachments

Bottom

Before submitting to LBB you must complete all entries on Contract Info, Requisition Info, Vendor Info, NIGP Info, and Attachments pages. All required data is marked with a red asterisk.

Search Vendor by Vendor ID: Search by ID...

Search by Vendor Name (at least 3 characters): Search by Name...

Vendor saved to Contract.

Vendor ID: 17422524557T26
Vendor: SAMPLE ENTERPRISES INC
Address Line 1: 3020 E LOCUST ST
Address Line 2:
Address Line 3:
Address Line 4:
City: LAREDO
State: TX
Postal Code: 780431429
Phone: -

Save Cancel Clear Screen Next

The system will inform the user when the vendor has been added. If the user is unable to find a vendor, email Contract.Manager@lbb.texas.gov for assistance.

4. NIGP INFO

The next data entry screen requires the assignment of National Institute of Governmental Purchasing (NIGP) codes to the record. NIGP codes consist of a class prefix and an item code suffix. The CPA maintains an **online reference guide** for NIGP codes.

Contract Info ✓ > Requisition Info ✓ > Vendor Info ✓ > NIGP Info > Attachments

Bottom

Before submitting to LBB you must complete all entries on Contract Info, Requisition Info, Vendor Info, NIGP Info, and Attachments pages. All required data is marked with a red asterisk.

Available Commodity Class/Items:

- 50 - ART EQUIPMENT AND SUPPLIES
- 52 - ART OBJECTS
 - 2 - Antiques
 - 8 - Ceramic and Glass Objects (Shadow Boxes, Stained Glass, etc.)
 - 12 - Collectibles, Museum Pieces, etc. (Not Otherwise Classified)
 - 14 - Cut-Outs, Life Size/Oversized, of Animals and Symbols
 - 16 - Drawings (Originals) (Charcoal Prints, etc.)
 - 24 - Engravings, Etchings, Linocuts, Lithographs, Scrolls, Serigraphs, and Similar Reproductions
 - 32 - Fabric Designs (Silk Screen, etc.)
 - 40 - Masks
 - 48 - Mixed Media
 - 50 - Murals Canvas

Include Exclude

A user can add NIGP items and classes by checking the box next to the item/class and then clicking the Include button at the bottom.

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Please note that selecting a check box next to an NIGP class will add that entire class to the record. To select a specific item within a class, click the small + next to the class name to expand it and gain access to the item codes within:

50 - ART EQUIPMENT AND SUPPLIES

Selected Commodity Class/Items:

- 52 - ART OBJECTS
 - 2 - Antiques
 - 40 - Masks
 - 50 - Murals, Canvas

Save Cancel Clear Screen Next

NIGP codes will appear at the bottom of the screen after clicking the Include button. The codes displayed in this list will be the codes assigned to that particular record.

5. ATTACHMENTS

The final data entry screen is where contract, solicitation, and attestation attachments are added to the record according to the applicable reporting requirement. For questions about attachments or redactions, please contact Contract.Manager@lbb.texas.gov.

Please Note: You indicated one or more Report Requirement codes

Contract Info ✓ > Requisition Info ✓ > Vendor Info ✓ > NIGP Info ✓ > Attachments

Bottom

Before submitting to LBB you must complete all entries on Contract Info, Requisition Info, Vendor Info, NIGP Info, and Attachments pages. All required data is marked with a red asterisk.

B. Attach multiple files

Amendment: 0 - SAMPLE CONTRACT SUBJECT

Document Name	Last Updated
No records to display.	

A. Attach a file (Only PDF file that is smaller than 52,400KB): Choose File No file chosen

about attachments...

C. Please Note: You indicated one or more Report Requirement codes which are part of Sec 7.11, Article IX, GAA. This requires that an Attestation letter be attached.

Top

Cycle through attachments for each version of this record

Hover over for additional info

A. Attach a file: Click Choose File to upload one file at a time. **Click Browse, select the PDF file to upload, and then click the Save button to attach that document to the record.**

Attach a file (Only PDF file that is smaller than 52,400KB): T:\COTT\Database Documents\CMS Agency User Guide\###_C Browse...

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PREVIEW BEFORE SUBMISSION

After a user has attached all required documents, the user may review the data entries before final submission. The system includes a final preview screen.

Take a moment to perform a quality control check on the record.

When a user is satisfied that the data is complete and accurate, click the Next action button to proceed to final submission.

Preview

Before you submit this record, please review the information you provided below for completeness and accuracy. Note that all information becomes publicly available once it is submitted to the LBB Contracts Database.

Preview Contract:

Subject: SAMPLE CONTRACT SUBJECT

Was the contract competitively procured pursuant to the provisions of the State Procurement Manual? Yes

Report Codes:

- Major Info Systems - General > \$100k (Sec 2054.008, Gov. Code)
- Major Info Systems - Institutions and Higher Ed > \$1 million (Sec 2054.008, Gov. Code)
- Construction > \$14k (Sec 2166.2551, Gov. Code)
- Professional Services > \$14k (Sec 2254.006, Gov. Code)
- Consulting Services > \$14k (Sec 2254.0301, Gov. Code)
- Purchases or Sales > \$50k (Sec 7.04(b), Article IX, GAA)
- Purchases > \$10 million (Sec 7.12, Article IX, GAA)
- Non-competitive purchases > \$1 million (Sec 7.12, Article IX, GAA)
- Emergency purchases > \$1 million (Sec 7.12, Article IX, GAA)

Agency Approval Date: 9/1/2015 Current Value: \$25,000,000
Award Date: 4/5/2016 Maximum Value: \$25,000,000
Completion Date: 8/31/2018 No Completion Date

Fiscal Year	Amount
2016	\$12,500,000
2017	\$12,500,000
2018	\$0
Fiscal Year Total:	\$25,000,000

Purchase Requisition#: SAMPLECONTRACTID
Purchase Category Code: Purchases of items from CPA term contracts using the CPA automated purchasing system

Is this a revenue generated contract? Yes No

of Bids Received: 1

Solicitation Posting Date: Information Unavailable Not Available

Next

SUBMIT CONTRACT RECORD

Submit contract records on the Change Status screen, which can be accessed at any time through the navigation menu (see right). The system also will navigate to this screen by default after a user has completed the previous reporting steps.

- Change Status**
- 1. Contract Info
- 2. Requisition Info
- 3. Vendor Info
- 4. NIGP Info
- 5. Attachments
- Amendments
- Return to Workflow

When submitting a completed record, a user has the option of including a note. This note is an opportunity for a user to provide any information that may be relevant to the record that is not otherwise captured in the data fields. This optional information is only for LBB staff use, and it will not be displayed publicly on the Contracts Database website.

To submit the record to the Contracts Database, select Submit to LBB and click the Save button. Records immediately become public when they are submitted.

Change Status

Submit to LBB

Save Cancel

Notes/Comments:
Provide any information about the record to share with the LBB. The information will not be publicly displayed.

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FINAL ERROR CHECKING

The system will not authorize a user to submit a record that contains data errors.

Any errors will appear in a list, and they must be addressed before the record can be submitted. Links at the end of the error message will take the user to the location of the error within the record.

The screenshot shows a web interface titled "Change Status" with a "Bottom" link in the top right corner. Below the title is a form with a radio button labeled "Submit to LBB" and two buttons, "Save" and "Cancel". Below the form is a red-bordered box containing the following error messages:

- Cannot Submit to LBB. The following Edit Checks must be cleared:
- Subject is required. (1.Contract Info)
- Contract was Competitively Procured is required. (1.Contract Info)
- At least one Reporting Requirement Code must be selected. (1.Contract Info)
- Agency Approval Date is required. (1.Contract Info)
- Award Date is required. (1.Contract Info)
- Provide a Completion Date, or select another option and include an Explanation. (1.Contract Info)
- Current Contract Amount \$0 does not equal Fiscal Years Allocations sum (1.Contract Info)
- Purchase Requisition Number is required. (2.Requisition Info)
- Purchase Category Code is required. (2.Requisition Info)
- Revenue Generated Contract indicator is required. (2.Requisition Info)
- Number of Bids Received is required. (2.Requisition Info)
- Provide a Solicitation Posting Date, or select another option and include an Explanation. (2.Requisition Info)
- Requisition Date is required. (2.Requisition Info)
- Vendor is required. (3.Vendor)

Red arrows point from the text on the left to the error messages in the screenshot. A red line connects the bottom of the text to the bottom of the error list, with three arrows pointing upwards to the first three error messages.

AMEND A CONTRACT

The Contracts Database enables users to reopen contract records and amend certain information within them. This feature can be used if the user’s agency executes a renewal, extension, or change request on a contract. Amendments should be reported to the Contracts Database within 30 days of execution.

SEARCH FOR THE CONTRACT



From the main News screen, click the Contracts Submitted to LBB button. This menu item will enable a user to filter and search all of the contracts the user’s agency has reported to the Contracts Database.

Only records that already have been submitted to the Contracts Database can be amended.

The system includes several options to filter a search, including specifying a vendor, when the contract was awarded, and NIGP items that are a part of the record. **To see all submitted contracts, click the Search button without applying any filters.**

- Click SEARCH to get query result.
- Click CANCEL to return to previous screen.

Search Contracts -- Contracts Submitted to LBB

A screenshot of the search interface for 'Contracts Submitted to LBB'. The page title is 'Search Contracts -- Contracts Submitted to LBB'. There are several input fields: 'Contract ID' (text box), 'Agency' (dropdown menu with '_ Select an Agency'), 'Vendor' section with 'Set Vendor List by Name (at least 3 characters):' (text box) and 'Vendor:' (dropdown menu), and 'Additional Filters' section with 'Fiscal Year:' (dropdown menu with '_ Select a Fiscal Year'), 'Contract Award Date From:' (text box), and 'Contract Award Date To:' (text box). Below these is a note about NIGP codes and a 'NIGP Class:' dropdown menu with '_ Select an NIGP Class'. At the bottom right, there are 'Search' and 'Cancel' buttons. The 'Search' button is highlighted with a red rectangular border. A red arrow points from the 'Search' button back to the 'Contracts Submitted to LBB' menu item in the previous image. There are also 'Bottom' and 'Top' links in the top right and bottom right corners respectively.

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UNLOCK THE CONTRACT

Each submitted contract record will appear as a separate row in the resulting search table, and each column will provide some basic information about the record.

To display a record, click the magnifying glass icon in the applicable row.

This action will display the submitted record, but the record will be locked from edits.



Contracts Submitted to LBB

You are viewing page 1 of 1

ID	Subject	Agency	Award Date	Vendor Name	Article	Current Value	Max Value
SAMPLECONTRACTID	SAMPLE CONTRACT SUBJECT	### - Sample Agency Name	04/05/2016	SAMPLE ENTERPRISES INC	03 - EDUCATION	\$25,000,000	\$25,000,000
						\$25,000,000	\$25,000,000

Change Status

- 1. Contract Info
- 2. Requisition Info
- 3. Vendor Info
- 4. NIGP Info
- 5. Attachments
- Amendments
- Return to Workflow

Change Status

Create Amendment or Modify Contract

Save Cancel

Notes/Comments:

When the record is displayed, use the Change Status screen to unlock the record for updates.

The Create Amendment or Modify Contract option will appear on the Change Status screen. If this option is unavailable, the record is still pending submission or edits.

This option enables a user to provide a note about why this record is being amended. This information will not be displayed publicly.

To unlock a contract record for edits, first select Create Amendment or Modify Contract and then click Save. This action will open the record and enable the user to edit certain data fields.

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UPDATE AND SUBMIT

The entry screens used to amend a contract record are the same as those for submitting the original data. When the contract record is open, some data fields will remain locked. These locked fields cannot be edited without assistance from LBB staff (Contract.Manager@lbb.texas.gov).

Purchase Requisition#: SAMPLECONTRACTID
 Purchase Category Code: Purchases of items from CPA term contracts using the CPA automated purchasing system
 Is this a revenue generated contract? Yes No
 # of Bids Received: 1
 Solicitation Posting Date : Information Unavailable Not Applicable
 TxMAS purchase through the CPA
 Requisition Date : 05/10/2016

Any grayed-out fields can not be edited.

When a user is satisfied with the changes:

- A. Navigate to the Change Status screen;
- B. Select Submit to LBB; and
- C. Click the Save button to resubmit the record.

Similarly to a regular contract record, a user will have to rectify any error messages before final amendment submission.

Amendments to contract records will become publicly available after they are submitted.

A. Change Status
 1. Contract Info
 2. Requisition Info
 3. Vendor Info
 4. NIGP Info
 5. Attachments
 -- Amendments
 Return to Workflow

Change Status
 Submit to LBB

A user can track information about amendments through the —Amendments screen. This screen displays each time the contract record was updated, what time it was updated, and which database user updated it. Click the magnifying glass icon to access each amendment.

Change Status
 1. Contract Info
 2. Requisition Info
 3. Vendor Info
 4. NIGP Info
 5. Attachments
 -- Amendments
 Return to Workflow

Contract > Core Information Amendment History

Amendment	Subject	Award Date	Approval Date	Complete Date	Current Value	Maximum Value	Last Updated	Last Updated By
1	SAMPLE CONTRACT SUBJECT	04/05/2016	09/01/2015	08/31/2018	\$25,000,000	\$25,000,000	1/17/2018 11:02:40 AM	tstagy4
0	SAMPLE CONTRACT SUBJECT	04/05/2016	09/01/2015	08/31/2018	\$25,000,000	\$25,000,000	1/4/2018 12:05:41 PM	tstagy4

(Amendment 0 refers to the initial data entered for the Contract)

Only one contract record can be amended at a time. Repeat these steps for each contract record that requires an update. Click Return to Workflow to return to the search results and to access other contract records.