



LEGISLATIVE BUDGET BOARD

Contracts Database New Interface

User Guide

LEGISLATIVE BUDGET BOARD STAFF

WWW.LBB.STATE.TX.US

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LEGISLATIVE BUDGET BOARD - CONTRACTS DATABASE
NEW INTERFACE USER GUIDE

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INTRODUCTION

The Legislative Budget Board (LBB) has begun transitioning to a new user interface for the **Contracts Database**. The new user interface will become available in February 2018, and will run in parallel to the existing interface through August of 2018. During this transition period, database users will have the option to use either interface.

On September 1, 2018 the Contracts Database will transition to using only the new interface. All data fields will remain the same, and no data will be affected by the change.

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

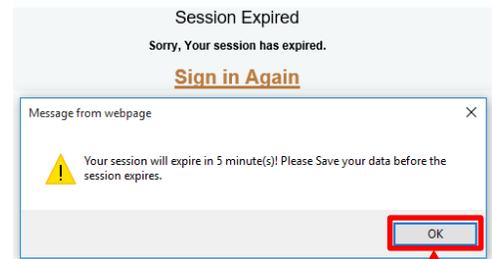
LOGIN

During the February – August 2018 transition, the Contracts Database will ask which interface you want to use. The same user credentials for the existing Contracts Database will work for both interfaces. The new login prompt is shown here:

New database credentials can be requested at <http://loginreqagy.lbb.state.tx.us/>

TIMING OUT

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



If you time out, click “OK” in the resulting prompt to log back in. Clicking the “X” on the prompt will require you to close your browser before logging back in.

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 work consistently and can create problems. The recommended screen resolution is 1280x1024.

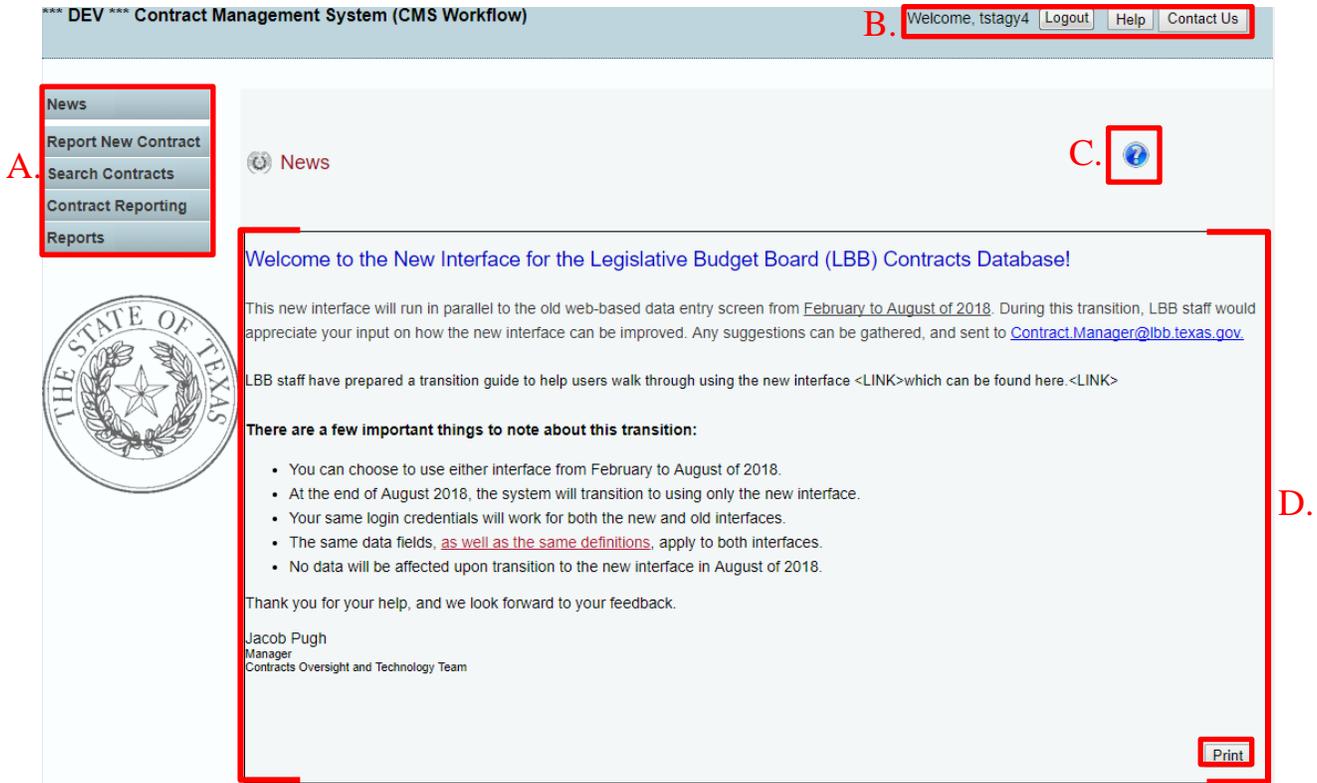
DATA FIELD DEFINITIONS

The existing data fields are used in the new Contracts Database interface. Those data fields are defined in the **Contracts Database Data Guide**, and these definitions will display in the new interface when you hover your cursor over a field.

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MAIN “NEWS” SCREEN

Once you log in using your existing credentials, you will see the main “News” screen for the new Contracts Database interface. This screen is the default dashboard for the interface.



On this screen you will find:

- 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 your primary tool for using the Contracts Database. When you hover over the “Contract Reporting” menu with your mouse, a submenu will appear.



These menu and submenus allow you to:

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

SEARCH CONTRACTS

You can search submitted contracts, as well as saved but unsubmitted contracts, using the main navigation menu. Searching also allows you to access 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 will allow you to filter and see all of the contracts your agency has in the Contracts Database.

SEARCH FILTERS

The system will give you several options to filter your 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

Use this if you have a specific contract record you want to find.

1. Enter at least three characters;
2. Click “Set Vendor List”; and
3. Choose which vendor name you want as a filter.

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VIEWING SEARCH RESULTS

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

This table features several tools to help you 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.

Clicking on the magnifying glass icon will 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

12345678910...
Export to Excel Top

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.

-Select Sort Item- ASC DESC

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

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 under statute and GAA requirements.** Submitted records are also the only ones eligible for new amendments.

D. Export to Excel: Click this button to download an 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. Once you open a contract record, you will see certain elements shared across the entire system:

- A. Summary info for the contract you are entering;
- B. An expanded version of the navigation menu for moving around data entry pages;
- C. A breadcrumb trail that shows progress on each reporting step;
- D. Hover-over definitions for data entry fields; and
- E. Action items that allow you to save info and navigate between reporting steps.

The screenshot displays the 'Contract Management System (CMS Workflow)' interface. At the top, it says '*** DEV *** Contract Management System (CMS Workflow)' and 'Welcome, tstagey4' 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 navigation menu (B) with options: Change Status, 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: '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 area (D) is intended for data entry. 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 that particular 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 ← Takes you back to your search results

If you wish to edit another record, you must click the “Return to Workflow” button which will take you back to your search results.

BREADCRUMB TRAIL

The breadcrumb trail acts as both a navigation aid as well as a tracker for your data entry progress. You can click on any of the steps to navigate to that particular entry screen.



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

Your location within a given contract record is marked with an underline. Any time a reporting step is complete, it will show up as green with a checkmark. The above image shows that you are currently on the “1. Contract Info” entry screen, and that you have successfully completed that step.



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

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

HOVER-OVER DEFINITIONS

If you are uncertain what a data field means, hover your 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 your main tools for managing your 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. **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 you advance to the next screen.
- E. **Delete** – This will delete the entire contract record and all associated data. After clicking, you will be prompted once more before it deletes the record. **Only unsubmitted contract records can be deleted.**

REPORT A NEW CONTRACT

Clicking “Report New Contract” on the main navigation menu will begin the process of submitting a contract to the Contracts Database.

Contract reporting has been broken down into smaller steps, which allows you to save your data more often as you go and will improve overall system performance. Each step in the reporting process is shown in a menu item, and is also tracked in a breadcrumb trail that updates as you go along.

The following shows which data fields are associated with the reporting steps in the new interface. These are based on the same fields from the existing 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 GAA, Article IX, Section 7.12

START WITH BASIC INFO

After you click “Report New Contract”, the system will prompt you for some basic information before opening the new record:

- Which agency you are reporting for (some users are responsible for multiple);
- The Contract ID you want assigned 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 created only after you provide these three data points and click “Save”. After you click the “Save” button, the system will advance you 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 you provide 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: 1/4/2018 12:00:19 PM Last Updated By: tstagey4

*Subject: SAMPLE CONTRACT SUBJECT

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

* Current Value: \$25,000,000

* Maximum Value: \$25,000,000

* 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 > \$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)

> Statute References

* Agency Approval Date: 9/1/2015

* Award Date: 4/5/2016

* Completion Date: 8/31/2018 **C. No Completion Date**

* Fiscal Year Amounts

Fiscal Year	Amount
2016	0
2017	0
2018	0
Fiscal Year Total:	\$0

B. Current Contract Amount \$10,000,000 does not equal Fiscal Years Allocations sum \$0

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

Save Cancel Clear Screen Next Delete

Displays info about the contract record's edit history.

This links to the legal text for each requirement

Use Action items to move on

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

A. Reporting Code logic: Value thresholds for reporting contracts to the LBB are based on the Maximum Contract Value. After you enter the Maximum Contract Value, the system will automatically check applicable Report Codes underneath. **You 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 may apply to your record.

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

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C. No Completion Date button: Like in the previous interface, the system gives you the option of reporting a contract without a set Completion Date. This can be done by clicking the “No Completion Date” checkbox next to the Completion Date field. **When this is done, a text field will appear where you should explain why there is no Completion Date for the record.** Your explanation will not be publically displayed.

* 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 your record does not have a related Completion Date.

2. REQUISITION INFO

Clicking “Next” will take you to the second step, where requisition and solicitation information is entered. Notice the breadcrumb 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# SAMPLECONTRACTID (Max 50 Characters)
* Purchase Category Code: **A.** Purchases of items from CPA term contracts using the CPA automated purcha...
* Is this a revenue generated contract? Yes No
* # of Bids Received: 1
Solicitation Posting Date :
 Information Unavailable **B.** Not Applicable
* Please briefly explain why you do not have a Solicitation Date
Use this box to explain your selection. Please include statutory citations when possible.
* Requisition Date : 05/10/2016
Top
Save Cancel Clear Screen Next

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

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

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3. VENDOR INFO

The LBB receives nightly downloads from the Texas Comptroller of Public Accounts (CPA) to populate its vendor list. You can search for your vendor either with their 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 let you know how many matches your search resulted in. **You must then select one of the vendor options, and click “save” or “next” for it to be assigned to your record.**

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 let you know when the vendor has been added. If you are unable to find a vendor, email Contract.Manager@lbb.texas.gov for assistance.

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4. NIGP INFO

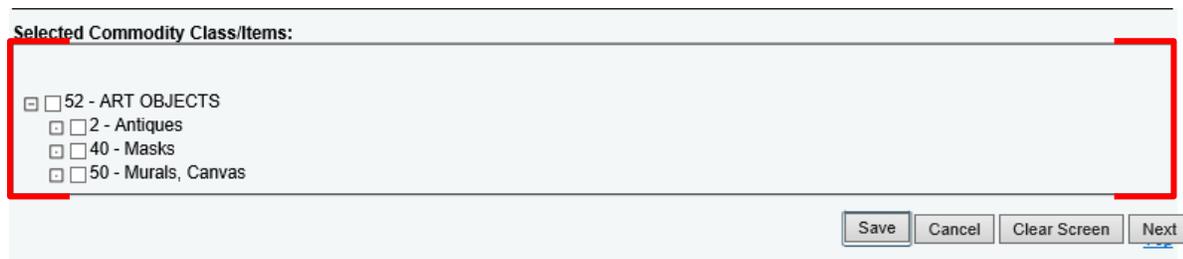
The next data entry screen requires the assignment of National Institute of Governmental Purchasing (NIGP) codes to the record. NIGP codes consist of a class prefix and an item code suffix. **The CPA maintains an [online reference guide](#) for NIGP codes.**



You add NIGP items and classes by checking the box next to the item/class and then clicking the “Include” button at the bottom.

Please note that selecting a check box next to an NIGP class will add that entire class to your 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



NIGP codes will appear at the bottom of the screen after you click the “Include” button. The codes displayed in this list will be the codes assigned to your particular record.

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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**. If you have questions about attachments or redactions, please contact Contract.Manager@lbb.texas.gov.

Cycle through attachments for each version of this record

Hover over for additional info

A. Browse: Use to upload one file at a time. **Click browse, select the PDF file on your system, and then click the save button to attach that document to the record.**

B. Multiple Attachments: Follow this link to a separate page that allows you to attach multiple files at once. **After selecting all of the files you want from your system, click save to return.**

C. Attestation Reminder: The system will look at the previously selected Report Codes for any that require an Attestation Letter (Article IX, Section 7.12, GAA). If you selected any that do, it will remind you to provide that attachment.

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After you have attached a file, it will appear in the table on the Attachments screen. This will show a timestamp when each file was added to that Contracts Database record. Additional features allow you to view the files, see which are associated with different versions of the record, and to remove files from the record.

- A. Use the Amendment dropdown menu to see different attachments associated with each version of the record;
- B. Delete an attachment using the red X icon; and
- C. View the file using the magnifying glass icon.



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.

[Attach multiple files](#)

A.

Amendment: 0 - SAMPLE CONTRACT SUBJECT	
Document Name	Last Updated
###_CONTRACT-ID_ATTESTATION.pdf	Jan 4 2018 12:21PM

B. C. Attach a file (Only PDF file that is smaller than 52,400KB):

[about attachments...](#)

Please Note: You indicated one or more Report Requirement codes which are part of Sec 7.12, Article IX, GAA. This requires that an Attestation letter be attached.

[Top](#)

PREVIEW BEFORE SUBMISSION

Once you have attached all required documents, you can review your work before final submission. The system will bring you to a final preview screen.

Take a moment to do a quality control check on the record. **Once you are satisfied that the data is complete and accurate, click the “Next” action button to proceed to final submission.**

Preview

[Bottom](#)

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

SUBMIT CONTRACT RECORD

Submitting contract records is done on the “Change Status” screen, which can be accessed any time through the navigation menu (see right).

The system will also bring you to this screen by default after you have completed the previous reporting steps.

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

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

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

The screenshot shows the 'Change Status' interface. At the top left, there is a 'Change Status' header with a refresh icon and a help icon. Below this is a 'Bottom' link. The main content area contains a radio button labeled 'Submit to LBB' which is selected. Below the radio button are 'Save' and 'Cancel' buttons. Below this is a 'Notes/Comments' section with a text area containing the instruction: 'Provide any information about the record that you want LBB to know. The information will not be publicly displayed'. A red box highlights the 'Submit to LBB' button and the 'Save' button. A red arrow points from the text above to the 'Submit to LBB' button. Another red arrow points from the text above to the 'Notes/Comments' text area.

FINAL ERROR CHECKING

The system will not let you 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 you to the location of the error within the record.

The screenshot shows the 'Change Status' interface with an error message. The error message reads: 'Cannot Submit to LBB. The following Edit Checks must be cleared:'. Below this is a list of error messages, each with a red link at the end: '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)', and 'Vendor is required. (3.Vendor)'. A red box highlights the error message and the list of error messages. A red arrow points from the text above to the error message. Three red arrows point from the text above to the links at the end of the error messages.

AMEND A CONTRACT

The Contracts Database allows users to re-open contract records and amend certain information within them. This can be used if your agency executes a renewal, extension, or change request on a contract. Similar to reporting the original contract, amendments should be reported to the Contracts Database within 30 days of execution.

SEARCH FOR THE CONTRACT

News	
Report New Contract	
Search Contracts	
Contract Reporting	- Report New Contract
Reports	- Contracts Pending Submission
	- Contracts Submitted to LBB
	- LBB Review Document Requests

From the main news screen, click the “Contracts Submitted to LBB” button.

This will allow you to filter and search all of the contracts your agency has reported to the Contracts Database.

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

The system will give you several options to filter your 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

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Contract ID:	<input type="text"/>
Agency:	<input type="text" value="_Select an Agency"/>
Vendor:	<input type="text" value="Set Vendor List by Name (at least 3 characters)"/> <input type="button" value="Set Vendor List"/> <input type="text" value="Vendor"/>
Additional Filters:	<input type="text" value="Fiscal Year: _Select a Fiscal Year"/> Contract Award Date From: <input type="text"/> Contract Award Date To: <input type="text"/>
<small>Search contracts reported to the Legislative Budget Board (LBB) by National Institute of Governmental Purchasing (NIGP) codes, which provide uniform class-item codes for goods and services purchased by state entities. Please note that NIGP codes are displayed as they were reported by state entities, and that contract records may contain more than one NIGP code per record. A searchable list of NIGP codes is maintained by the Texas Comptroller of Public Accounts</small>	
NIGP Class:	<input type="text" value="_Select an NIGP Class"/>

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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 will display the submitted record, but it will still be locked against 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:

[Empty text box for notes/comments]

Once the record is displayed, use the “Change Status” screen to unlock the record for your 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.

You have the option of providing a note about why this record is being amended. This information will not be publicly displayed.

To unlock a contract record for your edits, first select “Create Amendment or Modify Contract” and then click “Save”. This will open up the record, and allow you 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. Once the contract record is open, you will notice that some data fields will remain locked. These locked fields cannot be edited without assistance from LBB staff (Contract.Manager@lbb.texas.gov).

Any grayed-out fields can not be edited.

Once you are satisfied with your changes,
A. Navigate to the “Change Status” screen;
B. Select “Submit to LBB”; and
C. Click the “Save” button to resubmit the record.

Similar to a regular contract record, you will have to rectify any error messages before final amendmnt submission. Amendments to contract records will become publicly available once they are submitted.

You can track information about your 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.

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. These steps will need to be repeated for each contract record you wish to update. **Click “Return to Workflow” to go back to your search results, and to access other contract records.**