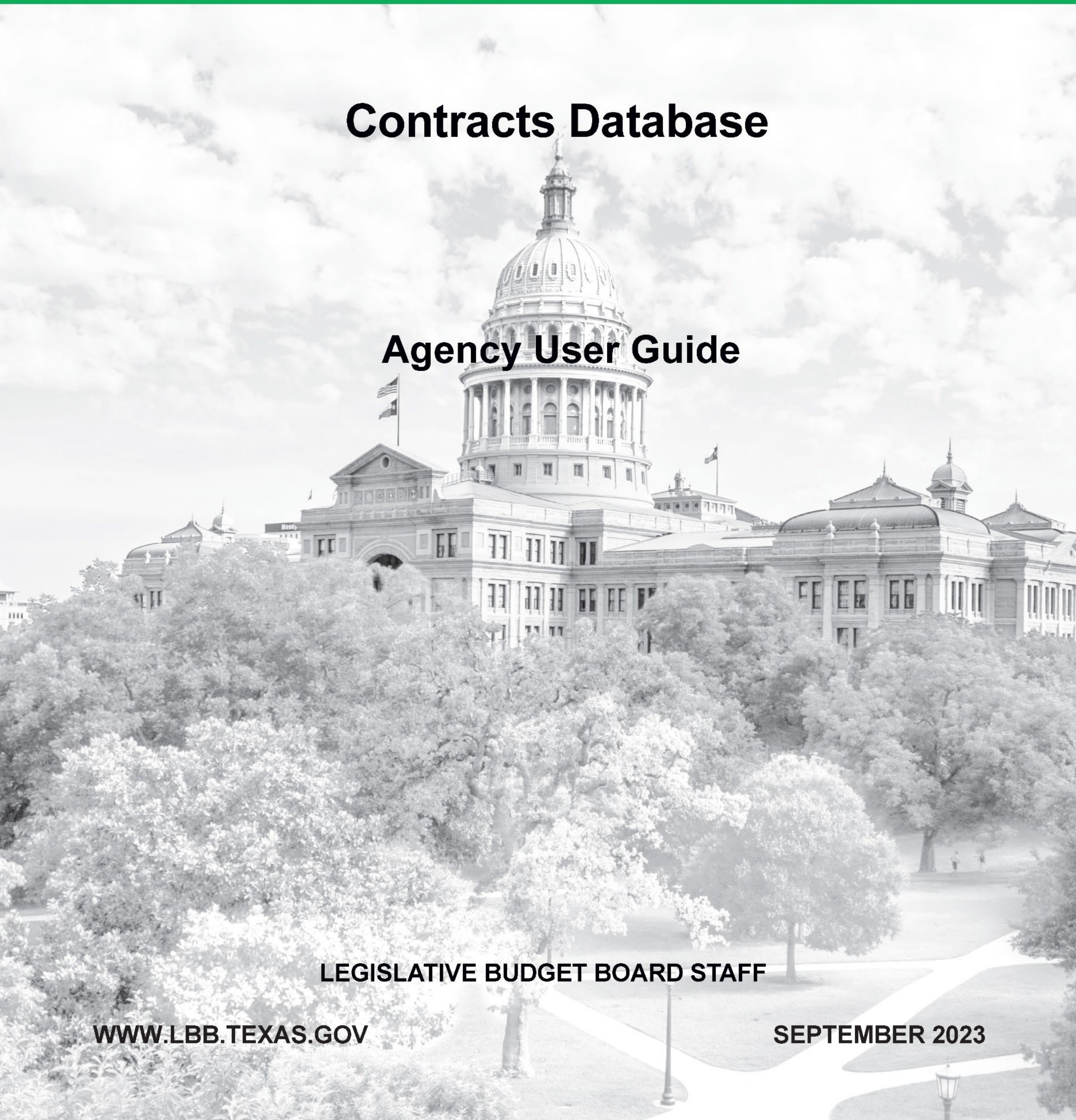
LEGISLATIVE BUDGET BOARD

Contracts Database

Agency User Guide



LEGISLATIVE BUDGET BOARD STAFF

WWW.LBB.TEXAS.GOV

SEPTEMBER 2023

CONTENTS

INTRODUCTION

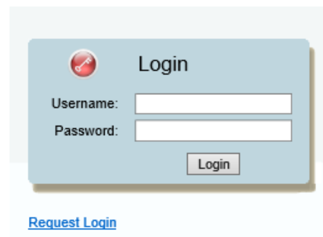
The Legislative Budget Board (LBB) transitioned to the Contract Management System (CMS) on September 1, 2018.

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

LOGIN

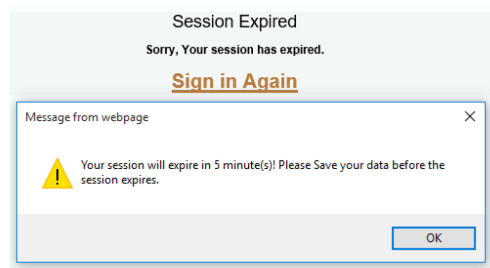
The login prompt is shown here:

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

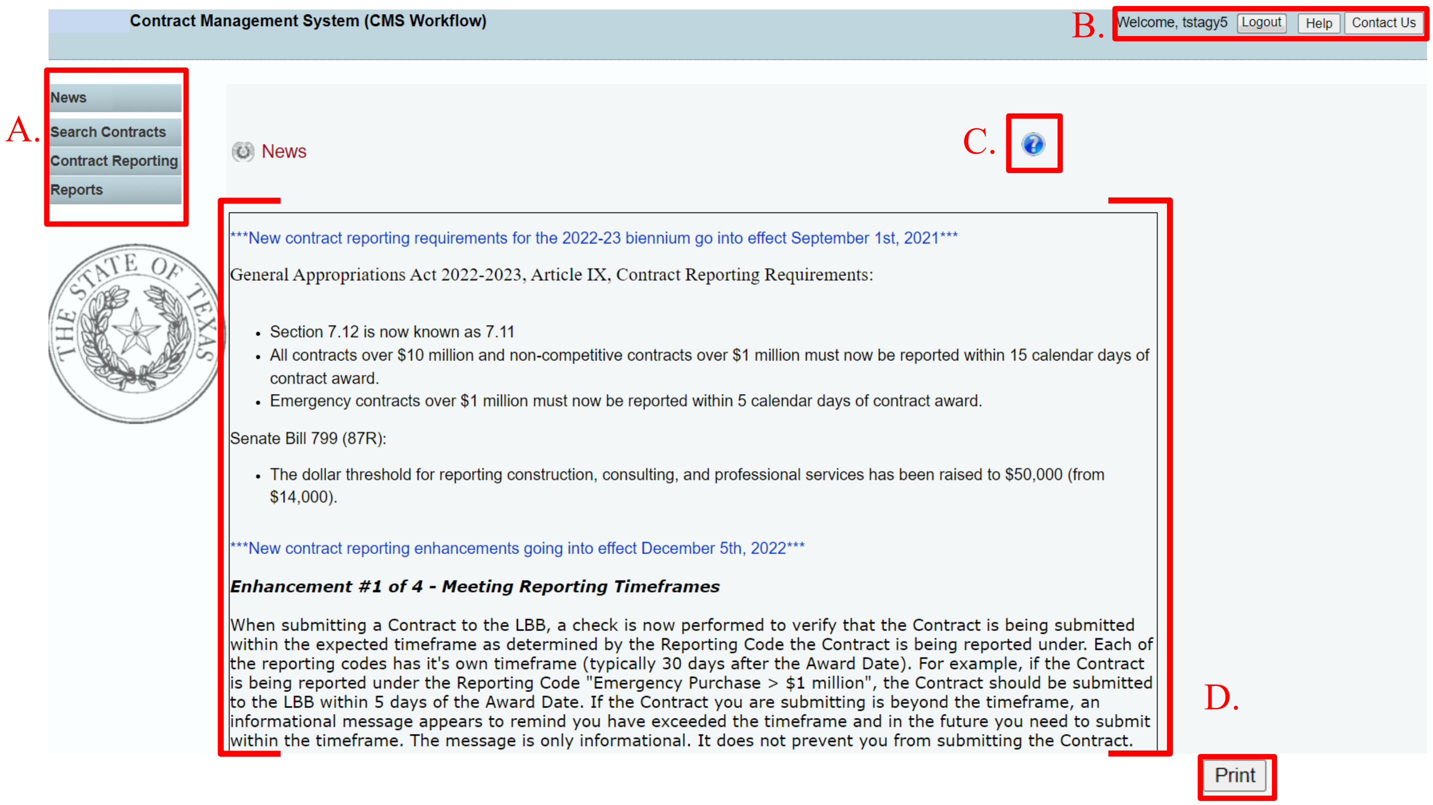
Internet Explorer or Google Chrome can be used for data entry. **Internet Explorer Version 11 is recommended.** Other browsers (e.g., Firefox, Safari, Microsoft Edge, etc.) will not function consistently. The recommended screen resolution is 1280x1024.

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.

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.

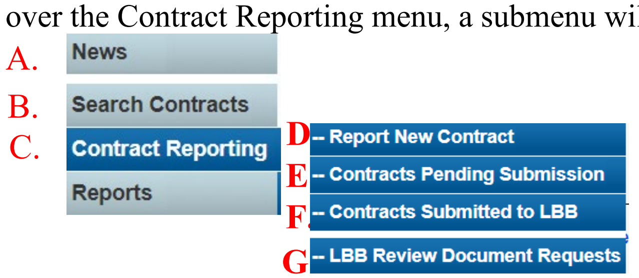


On this screen:

- 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.



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

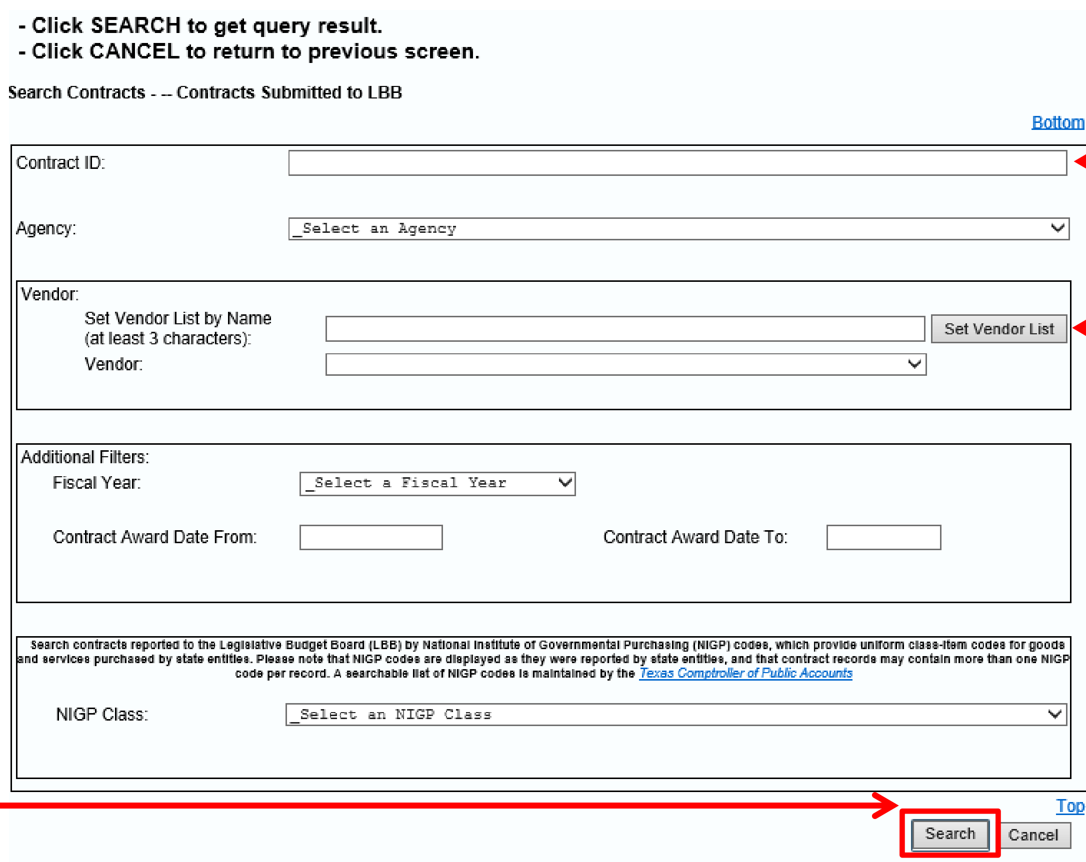
To search submitted contracts or saved but unsubmitted contracts, use the main navigation menu. Search Contracts also provides access to a submitted contract record to amend it.

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.**



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.

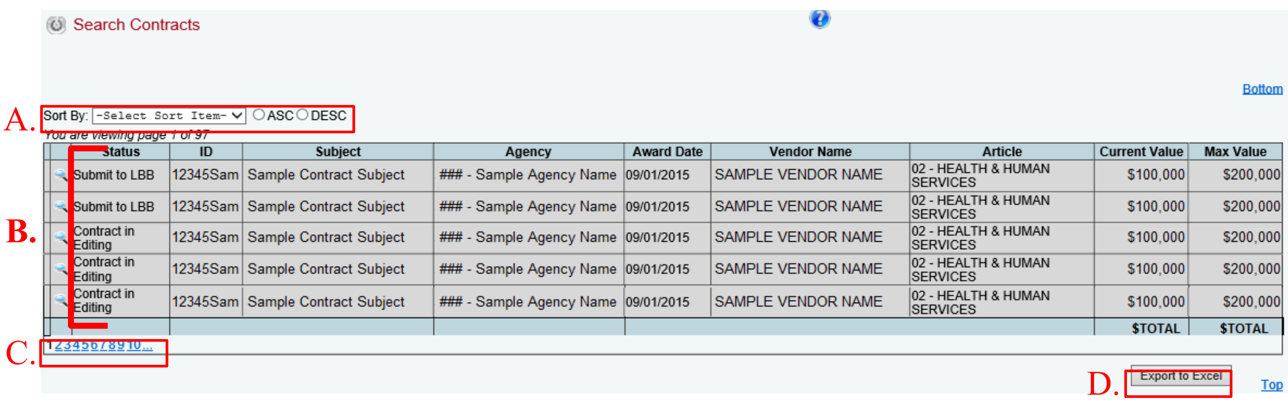
VIEWING SEARCH RESULTS

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.

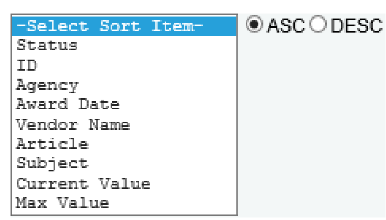
This table features several tools to help organize the information, including:

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.



	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



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 aphabetical and numerical values.

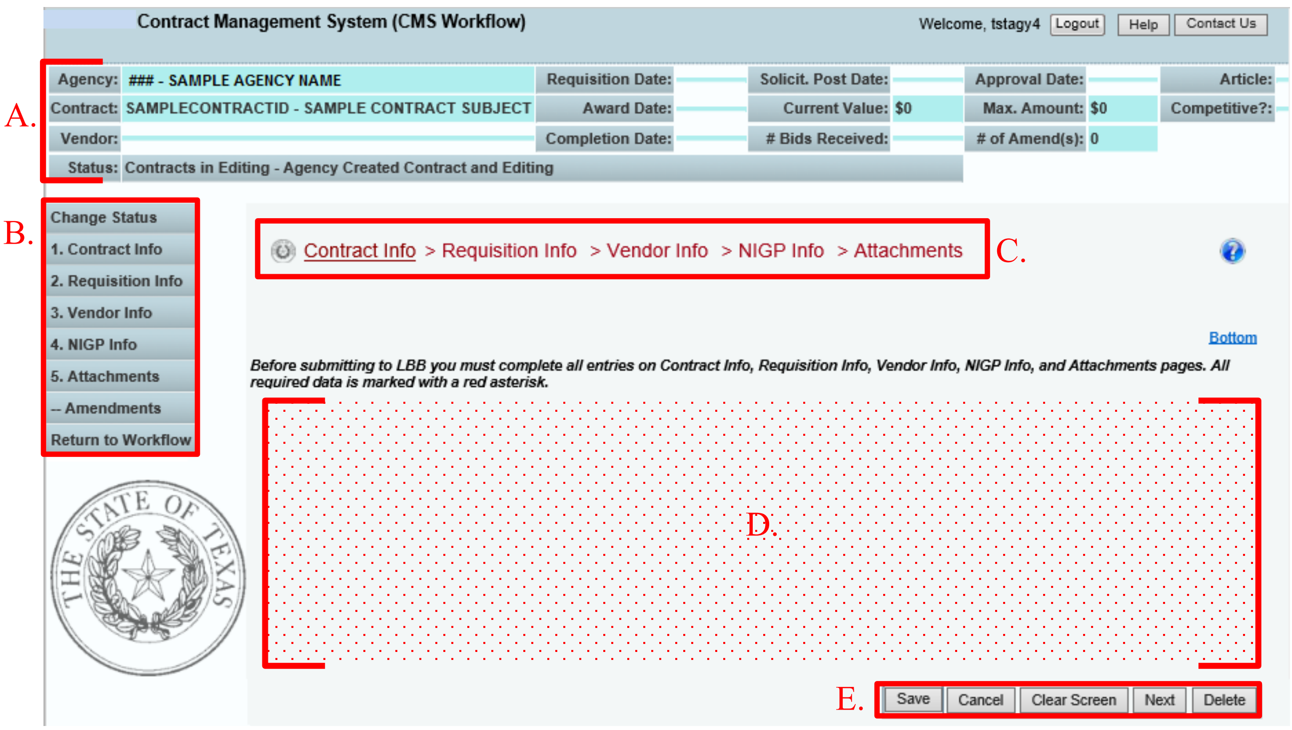
B. Submission Status: The Status column of the table indicates whether a contract record is submitted (Submit to LBB), or whether it is still in a saved/editing mode and is pending submission (Contract in Editing). **Only records marked Submit to LBB have been submitted to the system and reported to 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.



CONTRACT RECORD MENU

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

The screen for submitting or amending a contract record
Entry screen 1 for basic info
Entry screen 2 for solicitation and requisition info
Entry screen 3 to add a vendor
Entry screen 4 to designate all applicable NIGP codes
Entry screen 5 to add all required attachment PDFs
Displays all amendments for this record
Returns to search results

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

FILE PATH

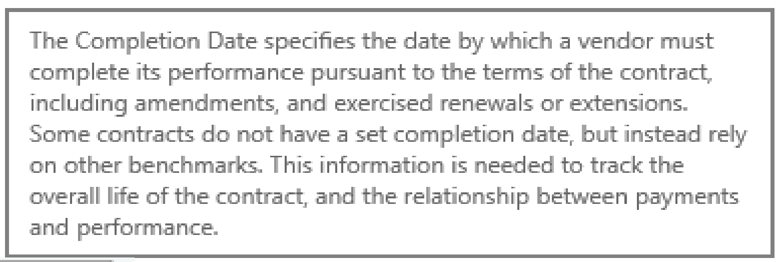
The file path acts as both a navigation aid and a tracker for data entry progress. Click on any of the steps to navigate to that particular entry screen.

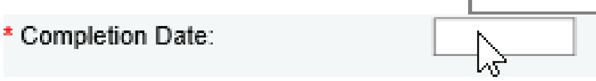
A user's location within a given contract record is marked with an underline. When a reporting step is complete, it will display in green with a checkmark. The above image shows that a user is currently on the 1. Contract Info entry screen, and that this step has been completed.

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.

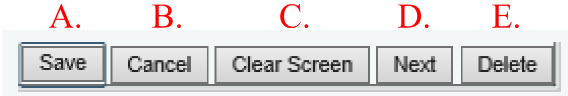




ACTION ITEMS

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.



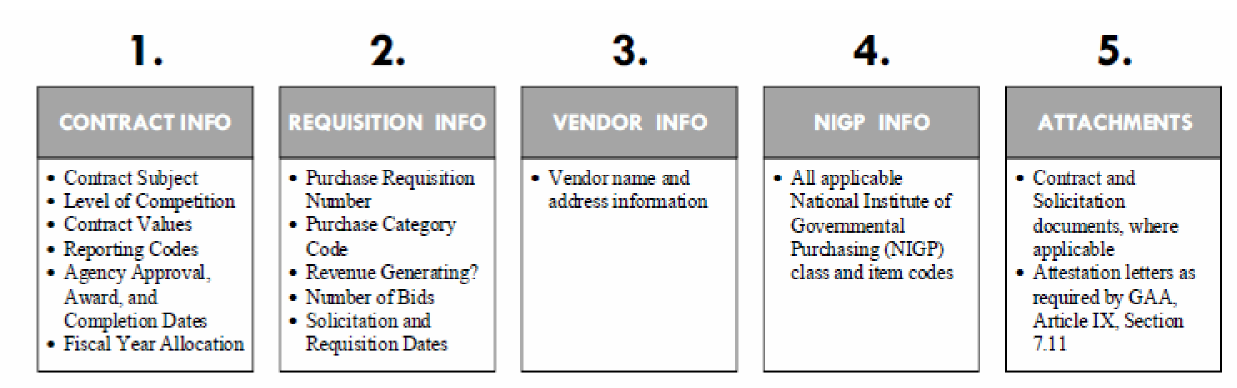
A. Save – Saves the data entered so far.
B. Cancel – Undoes the last action taken, even the Clear Screen action.
C. Clear Screen – Clears all of the data fields on that particular screen.
D. Next – Advances to the next data entry step screen. All entered data is saved when advancing to the next screen.
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.

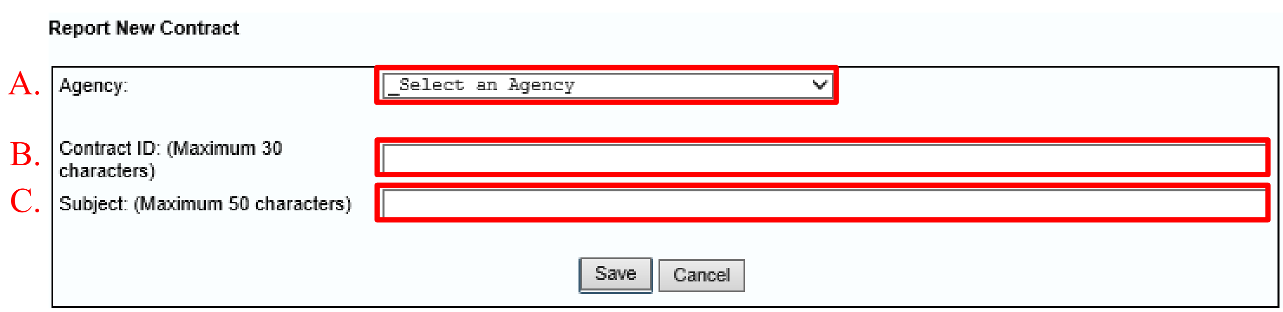
The following process steps show which data fields are associated with the reporting steps in the interface. These steps are based on the same fields from the previous web-based interface:



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:

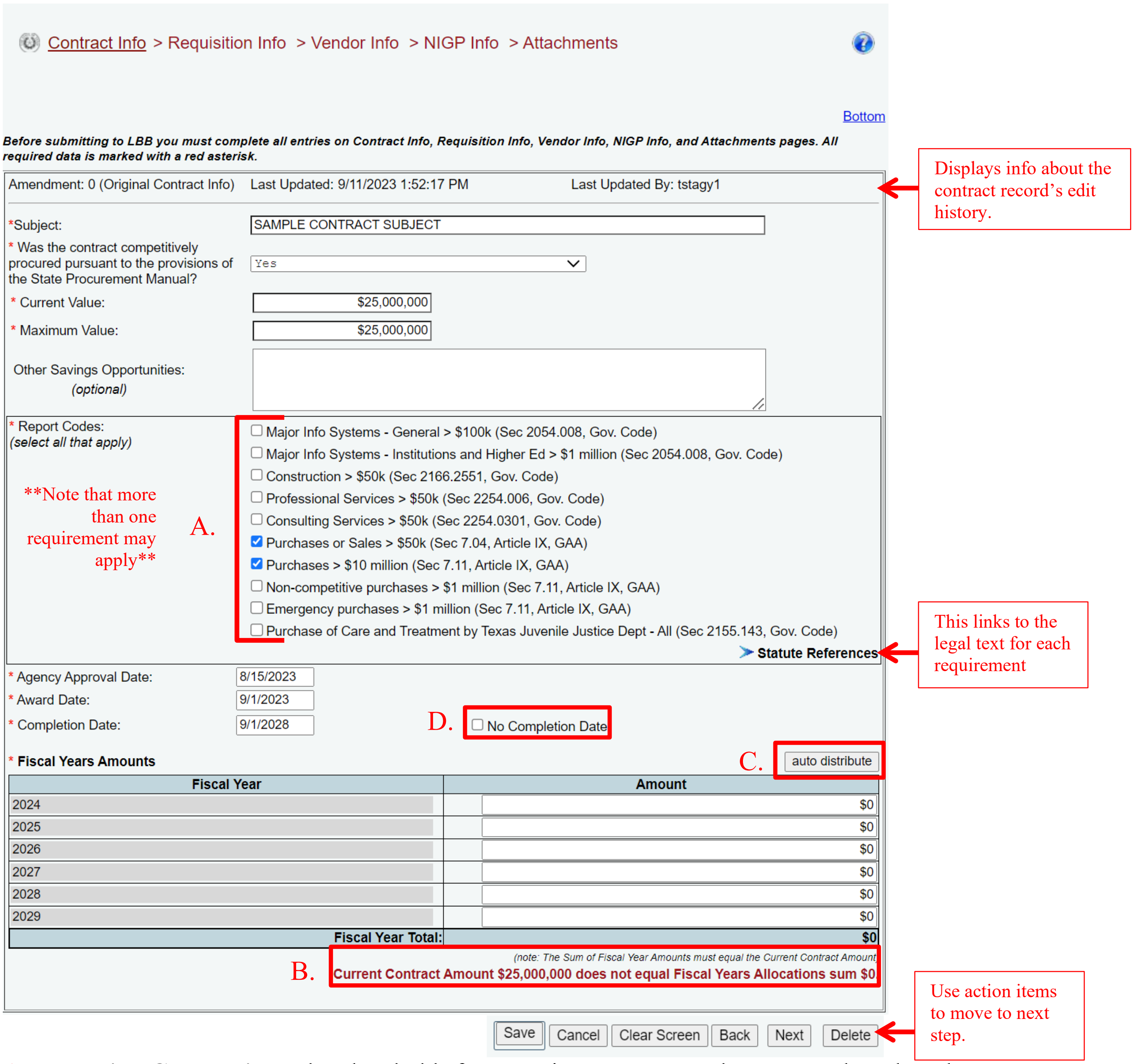
A. Which agency the user is reporting for (some users are responsible for multiple agencies);
B. The Contract ID to assign to the contract; and
C. A subject phrase that briefly describes the contract.



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.

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.**

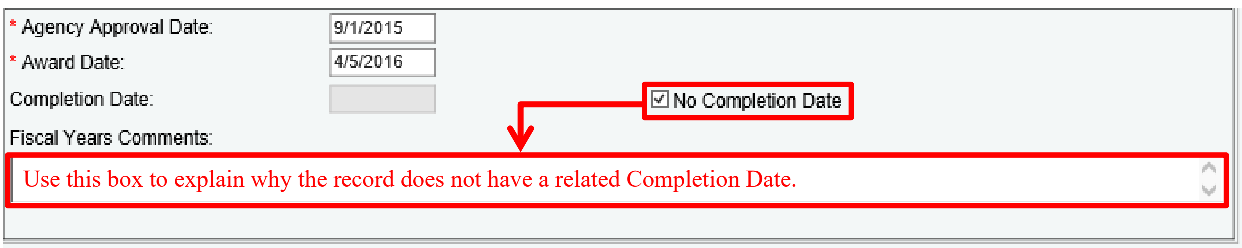


A. Reporting Code logic: Value thresholds for reporting contracts to the LBB are based on the Maximum Contract Value. After the user enters the Maximum Contract Value, the system automatically will check applicable Report Codes underneath. **Users are encouraged to review the selected codes and make 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.

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.

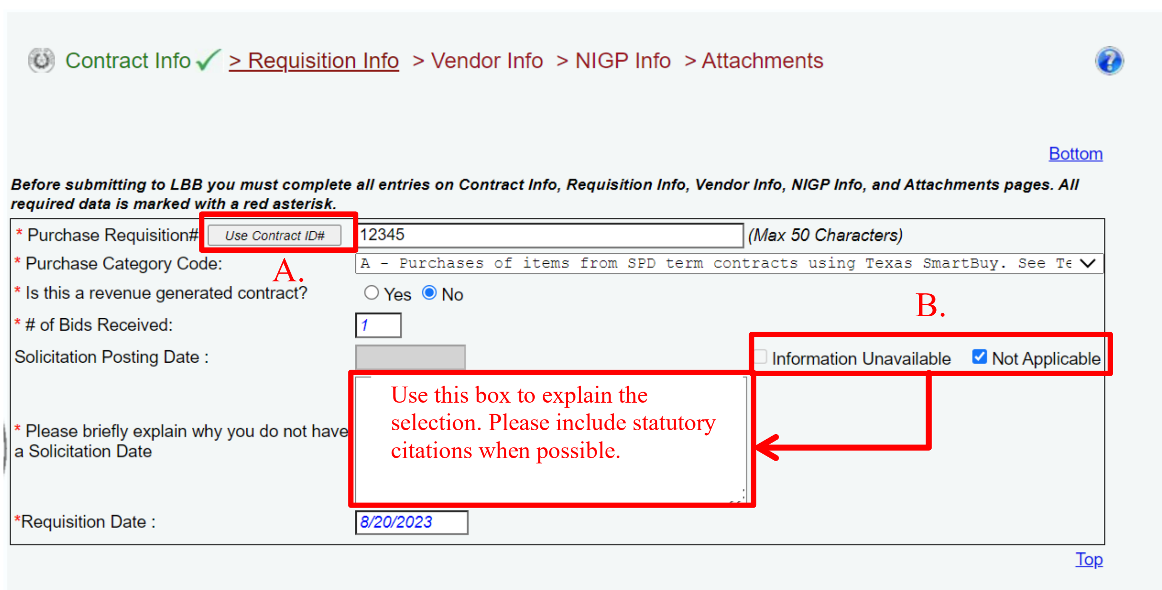
C. Auto Fiscal Years Distribution: This button will appear after the contract's value, award date, and completion date have been entered. Clicking on the button automatically will distribute the contract's Current Value evenly across the Fiscal Years.

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.



2. REQUISITION INFO

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

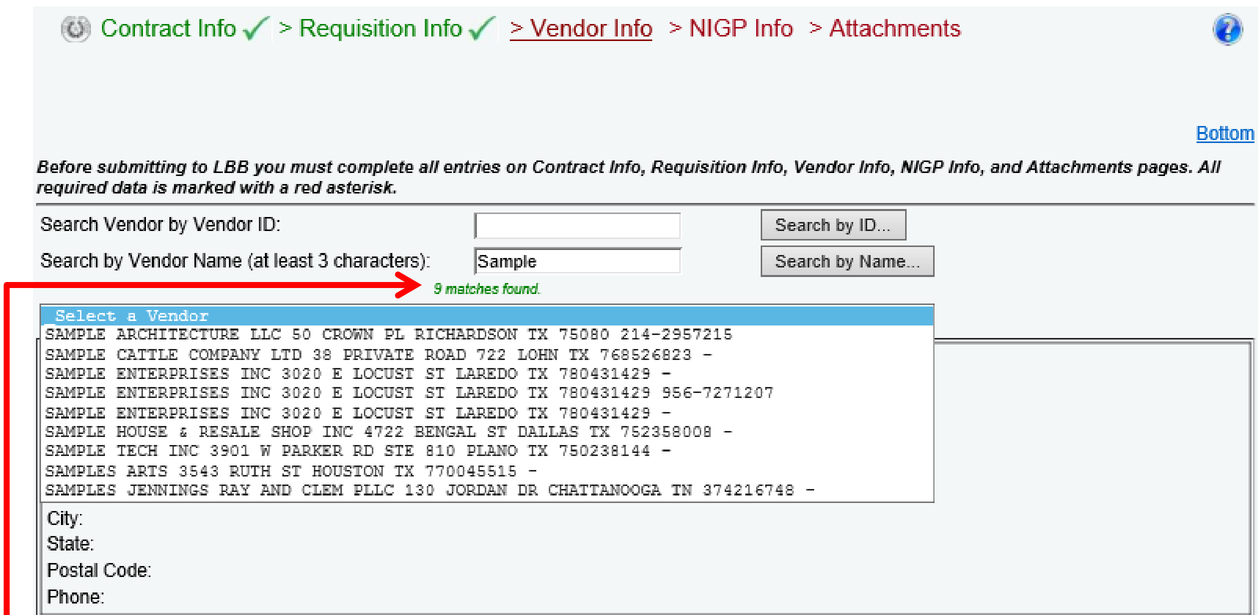


A. Use Contract ID# button: The system gives a user the option of using the record's contract ID number as the purchase requisition number. This option assists agencies that do not use separate requisition identifiers. **If an agency uses a separate requisition identifier, please make sure to provide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

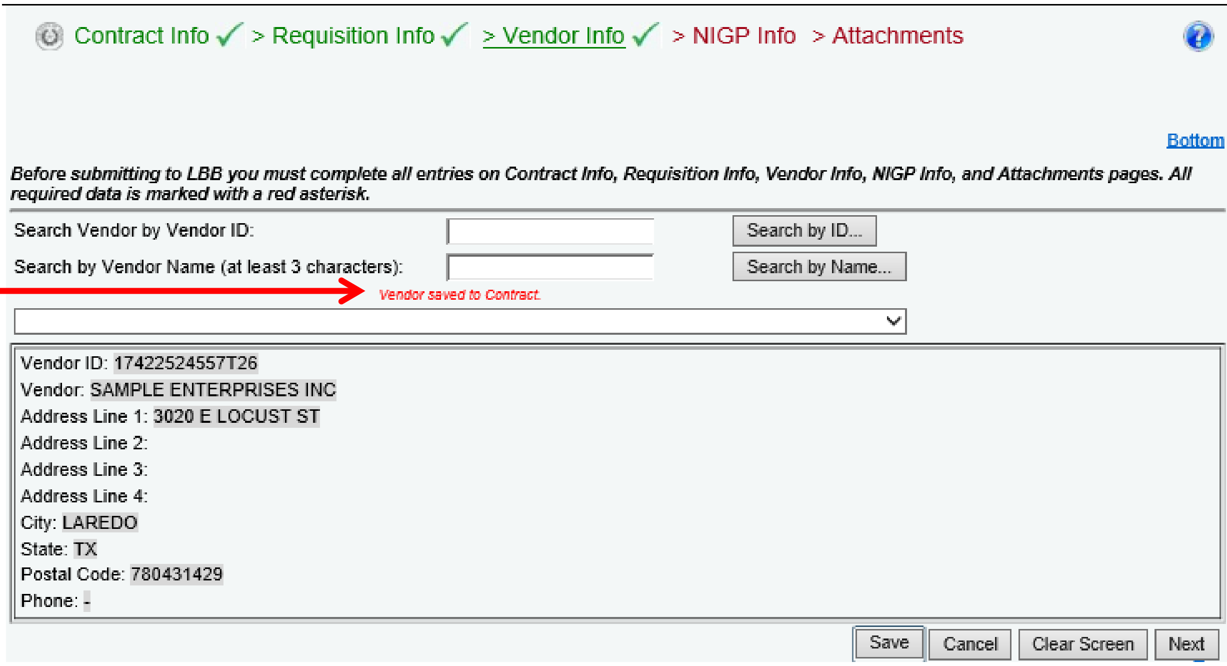
B. Solicitation Posting Date - Not Applicable / Unavailable: Two buttons are available to denote nontraditional solictations. Use Not Applicable if no solicitation is associated with the record. **Make sure to provide an explanation for the selection in the resulting text box.** The explanation will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



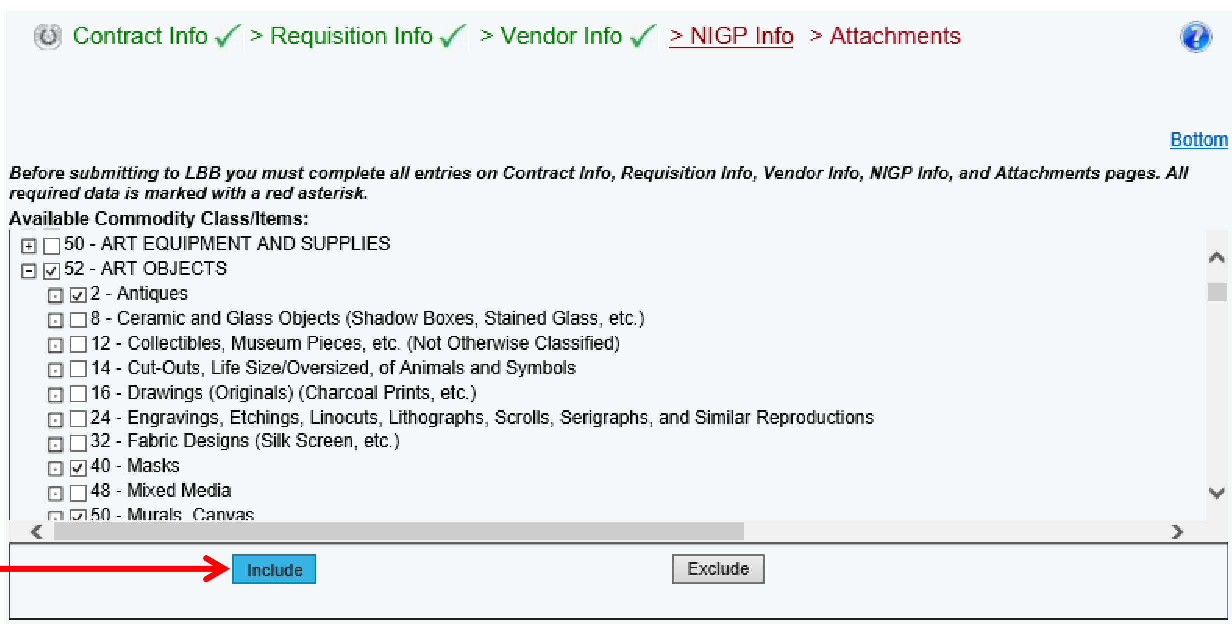
The system will display how many matches the search resulted in. **A user must then select one of the vendor options, and click Save or Next for it to be assigned to the contract record.**



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.

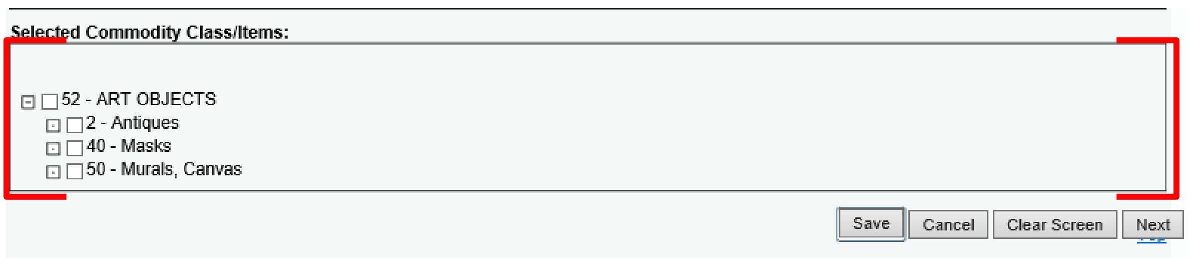
4. NIGP INFO

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.**



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.

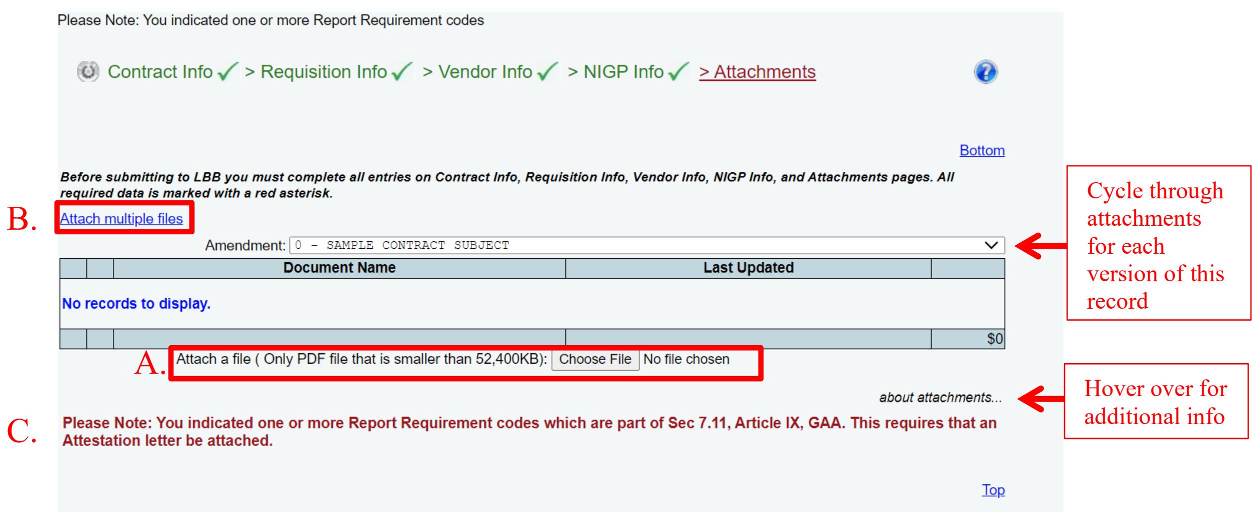
Please note that selecting a check box next to an NIGP class will add that entire class to the record. To select a specifc item within a class, click the small + next to the class name to expand it and gain access to the item codes within:



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.

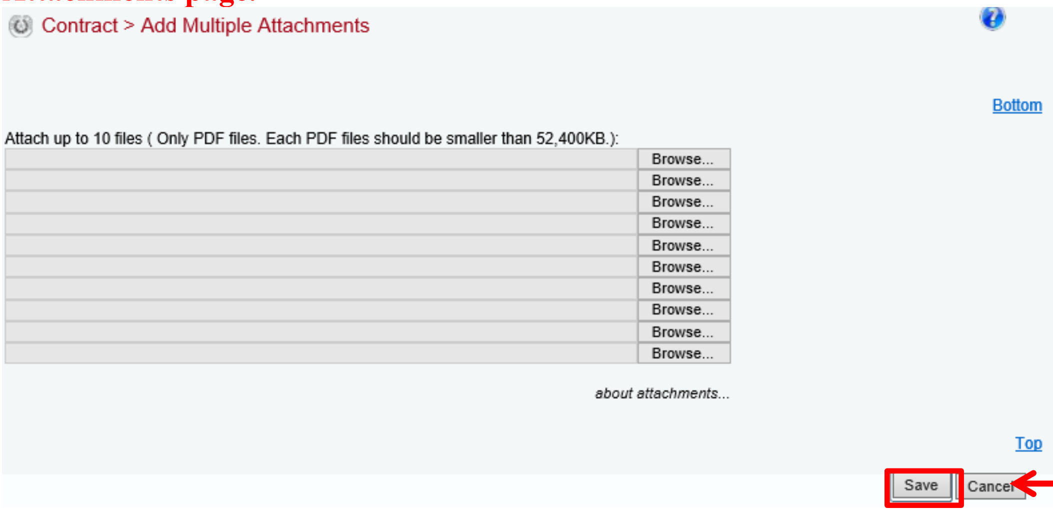
5. ATTACHMENTS

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.



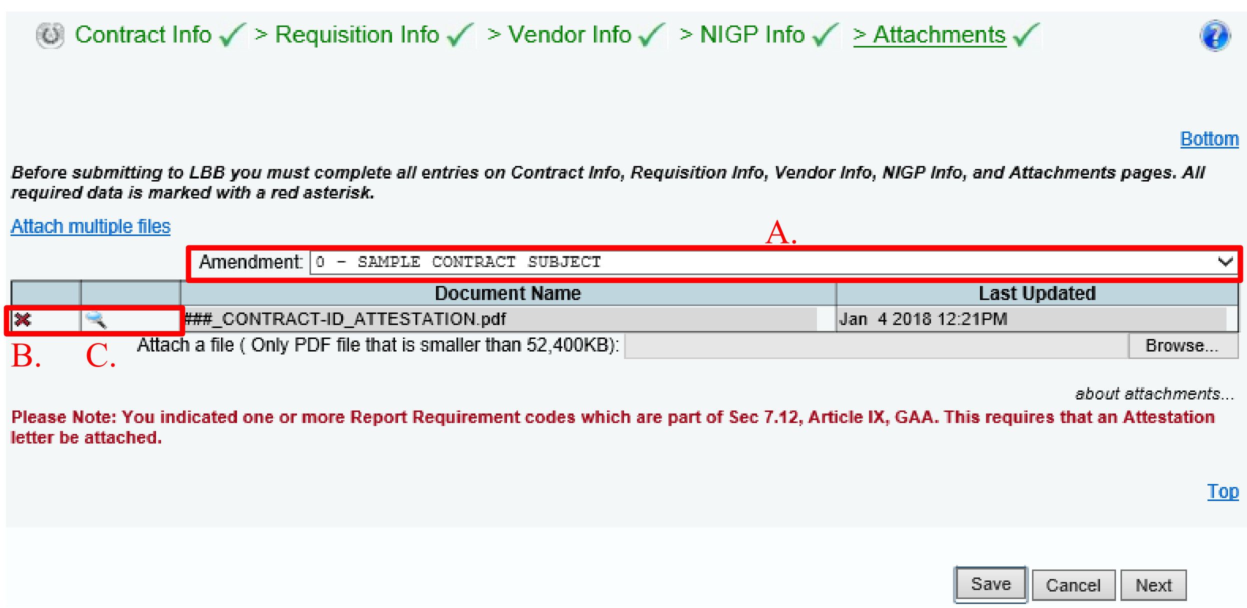
A. Attach a file: Click Choose File to upload one file at a time. **Click Browse, select the PDF file to upload, and then click the Save button to attach that document to the record.**

B. Multiple Attachments: Follow this link to a separate page that enables a user to attach multiple files at once. **After selecting all of the files for upload, click Save to return to the Attachments page.**



C. Attestation Reminder: The system will review the previously selected Report Codes for any that require an Attestation Letter pursuant to the GAA, Article IX, Section 7.11. If the user selected any that require attestation, the system will prompt the user to provide that attachment. After attaching a file, it will appear in the table on the Attachments screen. This screen will show a timestamp when each file was added to that Contracts Database record. Additional features enable a user to view the files, see which are associated with different versions of the record, and to remove files from the record.

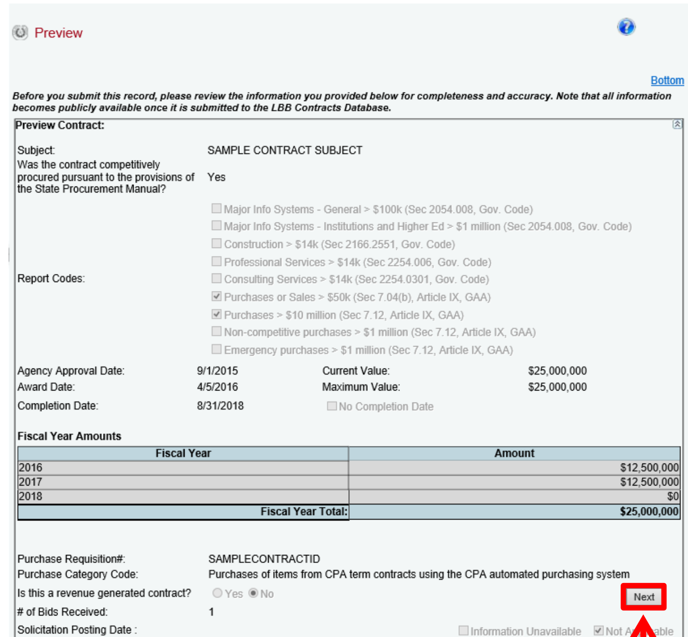
A. Use the Amendment dropdown menu to see the various attachments associated with each version of the record;
B. Delete an attachment using the red X icon; and
C. View the file using the magnifying glass icon. 



PREVIEW BEFORE SUBMISSION

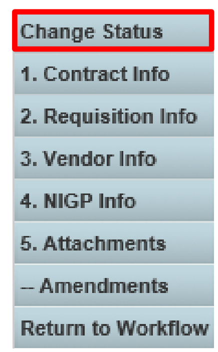
After a user has attached all required documents, the user may review the data entries before final submission. The system includes a final preview screen.

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.**



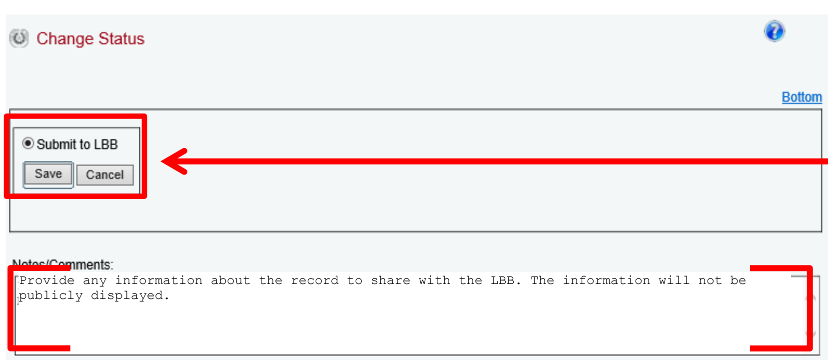
SUBMIT CONTRACT RECORD

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.



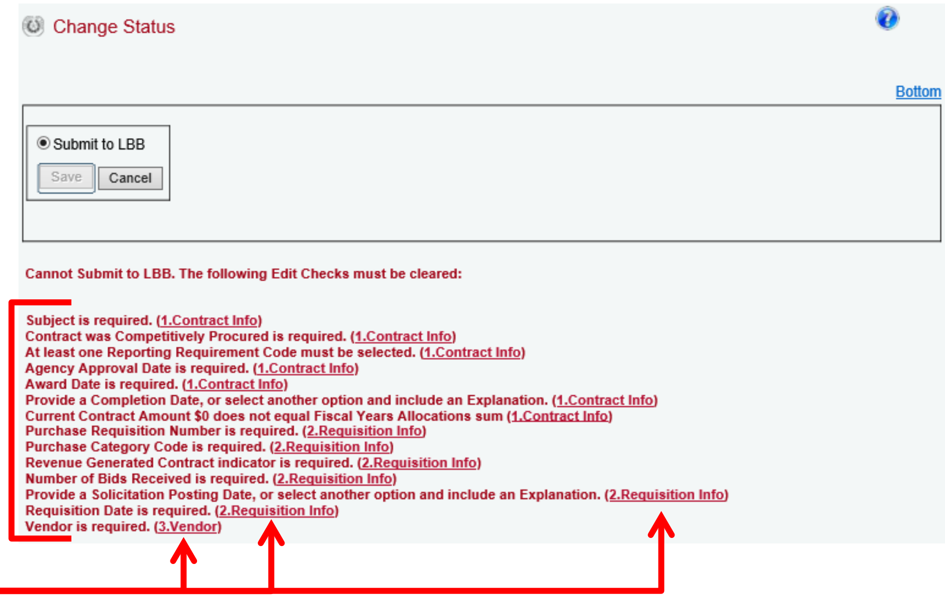
When submitting a completed record, a user has the option of including a note. This note is an opportunity for a user to provide any information that may be relevant to the record that is not otherwise captured in the data fields. This optional information is only for LBB staff use, and it will not be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



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.



AMEND A CONTRACT

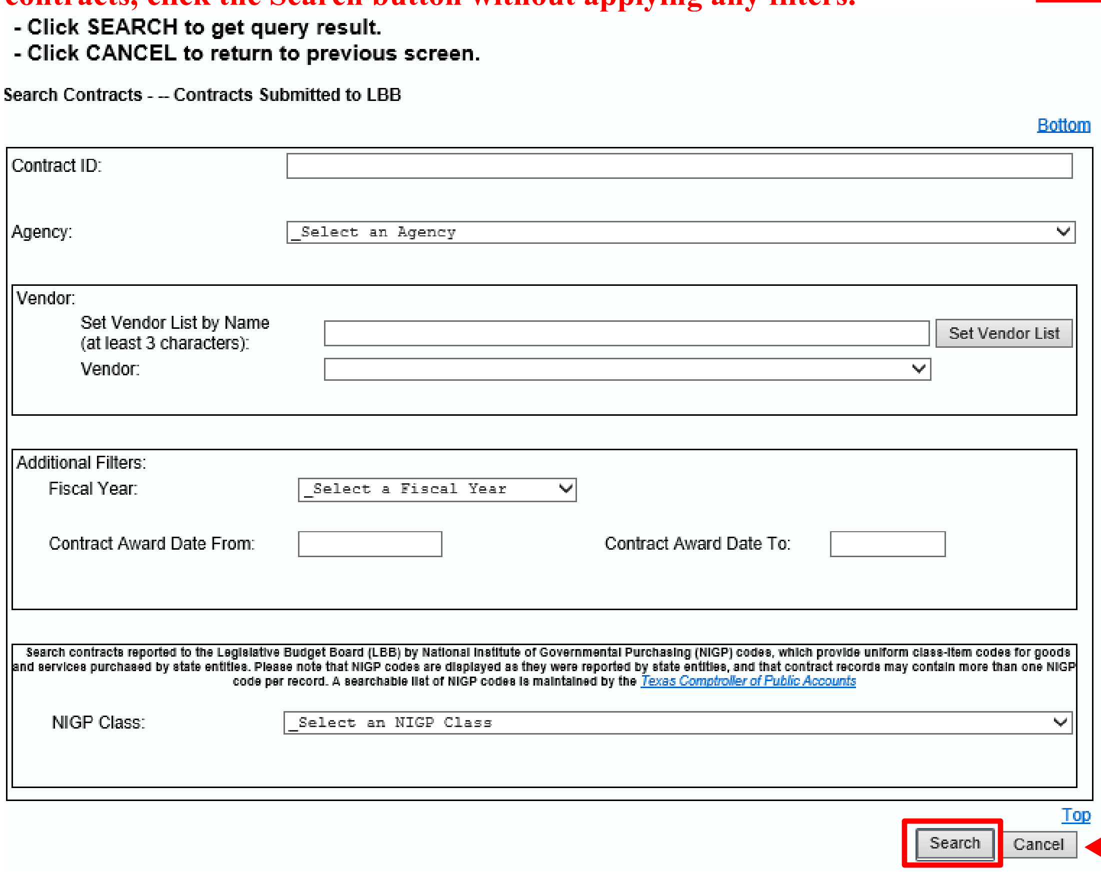
The Contracts Database enables users to reopen contract records and amend certain information within them. This feature can be used if the user's agency executes a renewal, extension, or change request on a contract. Amendments should be reported to the Contracts Database within 30 days of execution.

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.

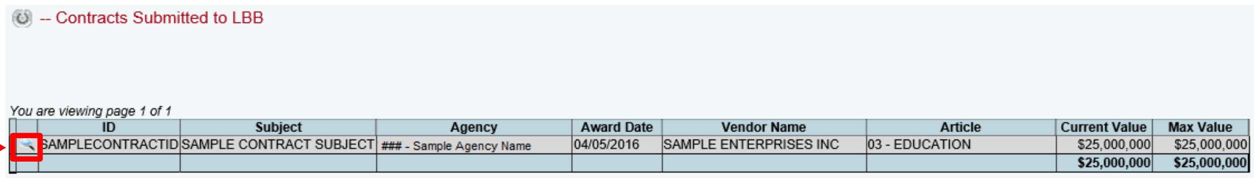
The system includes several options to filter a search, including specifying a vendor, when the contract was awarded, and NIGP items that are a part of the record. **To see all submitted contracts, click the Search button without applying any filters.**

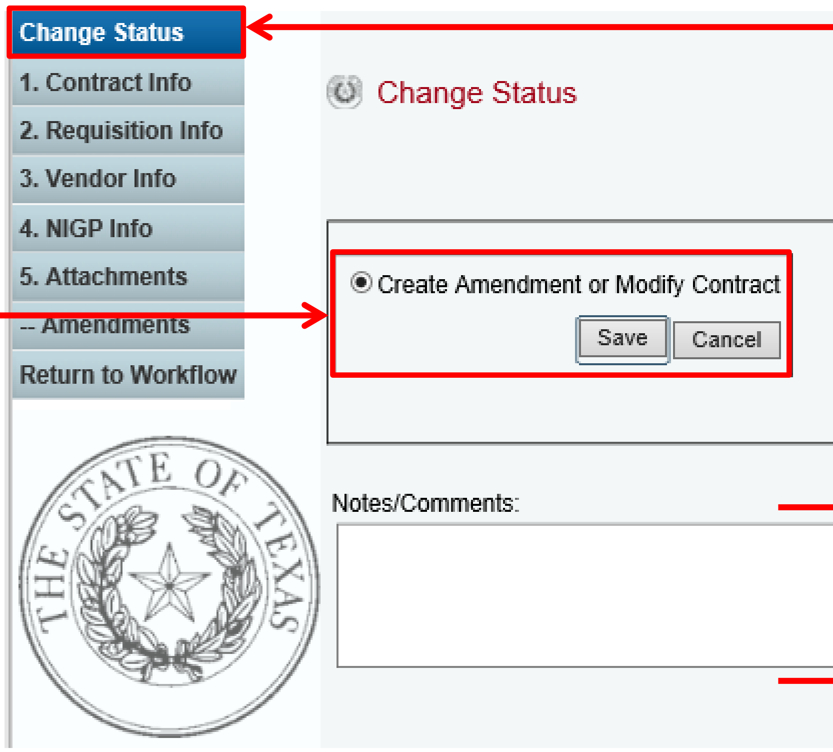


UNLOCK THE CONTRACT

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.





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

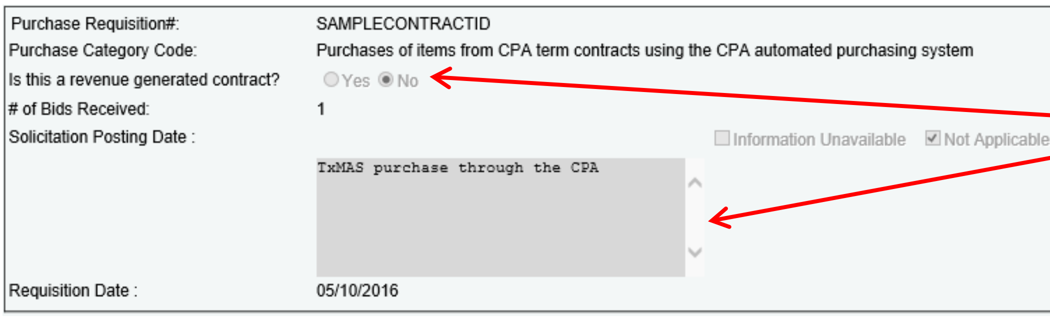
The Create Amendment or Modify Contract option will appear on the Change Status screen. If this option is unavailable, the record is still pending submission or edits.

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.

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).

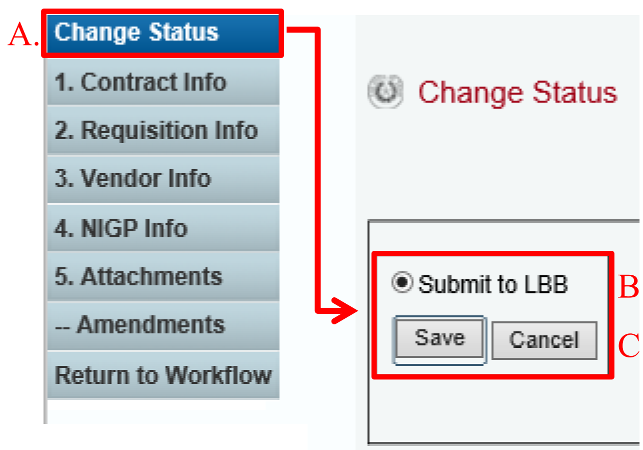


Any grayed-out fields can not be edited.

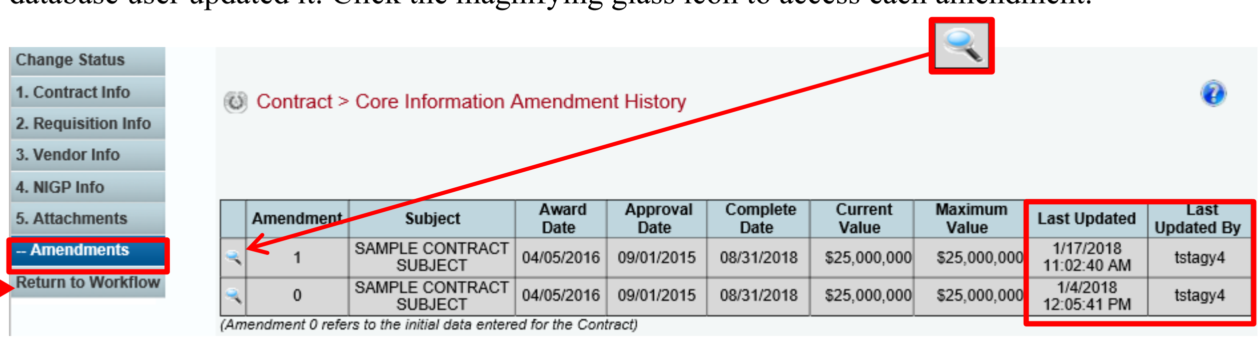
When a user is satisfied with the changes:

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 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.



	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.**