



UNTS Quick Reference Guide

TOTAL CONTRACT MANAGER (TCM)

PRODUCT VERSION 20.3

Modified on Tuesday, March 21, 2023 for training purposes.



Reports and Searches

Contracts that Require Attention: Review Pending

- This report lists contracts by Alert Type occurring within a selected date range that are due for Review.

Contracts that Require Attention: Expiring Contracts

- This report lists contracts ending within a specified date range that do not have an executed Renewal or Amendment in place.

Workload by Contract Manager

- This report lists contracts by OCA Staff member and/or contract statuses.

Cycle Time Report

- This reports lists the cycle time on contracts that are in an executed status and were created or executed within a specified timeframe.

Saved Searches

- Any saved searches appear in a list.

Contracts that Require Attention: Review Pending Report STEP-BY-STEP

- ❖ Navigate to Contracts > Reports > Contracts that Require Attention: Review Pending
- ❖ Select the time period for the report by selecting one of the following options in the Occurs Within field:
 - 0-30 Days - Returns contracts with reviews occurring within 30 days of today's date.
 - 31-60 Days - Returns contracts with reviews occurring 31-60 days from today's date.
 - 61-90 Days - Returns contracts with reviews occurring 61-90 days from today's date.
 - 91-120 Days - Returns contracts with reviews occurring 91-120 days from today's date.
 - Next X Days - Selecting this option opens a field where you can select the number of days from today's date that you want to return results for.
 - Date Range - Returns results within a period of time. Selecting this option opens From: and To: fields, where you can select the first and last date of the range.
 - Remaining Fiscal Year - Returns contracts with a review occurring from the current date through the rest of the fiscal year, as set for your organization.
- ❖ Click Run Report.

Contracts that Require Attention: Expiring Contracts Report STEP-BY-STEP

- ❖ Navigate to Contracts > Reports > Contracts That Require Attention: Expiring Contracts.
- ❖ Select the time period for the report by selecting one of the following options in the Contracts Ending Within field:
 - 0-30 Days, 31-60 Days, 61-90 Days, 91-120 Days, Next X Days, Date Range, or Remaining Fiscal Year
 - In the Renewal/Amendment Status field, select one of the following options. Leave the field blank to allow all records for the field to be returned:
 - No Renewal/Amendment Created - Returns expired or expiring contracts with no renewals or amendments created.
 - Renewal is In Progress - Returns expired or expiring contracts where there is a renewal created but it has not reached Executed: In Effect status.
 - Amendment is In Progress - Returns expired or expiring contracts where there is an amendment created but it has not reached Executed: In Effect Status.
 - In the Renewals Remaining field, select one of the following options. Leave the field blank to allow all records for the field to be returned:
 - None - Returns expired or expiring contracts with no renewals remaining (0 in the Renewals Remaining field on the contract header).
 - One or more - Returns expired or expiring contracts with at least one renewal remaining.
- ❖ Click Run Report. Contracts that meet search criteria are listed in the Graphs and Details sections.

Workload by Contract Manager Report STEP-BY-STEP

- ❖ Navigate to Contracts > Reports > Workload Report by Contract Manager.
- ❖ In the Contract Manager field, select the OCA Staff that you want to report on. Leaving the field blank will return results for all OCA Staff.
- ❖ In the Contract Status field, select the contract statuses that you want to report on. Leaving the field blank will return results for all contract statuses.
- ❖ Click Run Report. The results appear in a table.



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Reports and Searches

Cycle Time Report STEP-BY-STEP

- ❖ Navigate to Contracts > Reports > Cycle Time Report: Contract Creation to Execution.
- ❖ In the Contracts field, select Created to return results for contracts that have been both created and executed within the time period selected. Select Executed to return results for contracts that have been executed within the time period, but could have been created at any time.
- ❖ In the Within field, select the time period to report on by selecting a date range (from today's date), or a fiscal time period.
- ❖ Once the search filters are set, click Search. Results are displayed in graphs that show the number of contracts created or executed across the time period selected, and the average amount of time that contracts spend in each status. Detailed results are listed in tables.

Saved Searches STEP-BY-STEP

SAVE A SEARCH

- ❖ Navigate to Contracts > Contracts > Search Contracts
- ❖ Select the search type by clicking the Advanced Search link in the top-right corner.
- ❖ Enter search criteria.
- ❖ In the left menu, click Save New Search. The Add to Saved Searches window opens.
- ❖ Enter a nickname for the search. This is the name that will identify the search.
- ❖ Select the Personal folder that you want to save the search in.
 - Note: You can create a folder by clicking Add New,
 - Select Top level personal folder because the search should only be available to you
 - Enter a name for the folder
 - Define access to it
 - Click Add Access and select whether you want to add access by Business Unit, Department, Role or User.
 - Define type of access to it
 - Recommendation: Read-Only - Users can view and copy searches, or add them as shortcuts to the Search Contracts page. They cannot move, edit or delete searches.
- ❖ Click Save. The search is saved to the folder.

VIEW SAVED SEARCH

- ❖ Navigate to Contracts > Contracts > Views Saved Searches
- ❖ In the left menu click the folder that contains the search.
- ❖ Click on the search name or click Go.

EXPORT A SEARCH

- ❖ View your saved search
- ❖ Click the Export Search button in the left menu. The Export Search window opens.
- ❖ Enter a description of the search. The description can be up to 200 characters.
- ❖ Select a format for the report in the Action field. The options are Export Excel (.xls) and Export CSV (.csv).
- ❖ Click Submit. The Export Submitted window opens.
- ❖ Click Go to Page: Download Export Files. The Contract Import/Export Results window opens.
- ❖ Click on the file name to open and save the file to your local drive.

UPDATE / CHANGE A SAVED SEARCH

- ❖ Access and run the saved search.
- ❖ Change the search criteria in the Refine Search Results section on the Contract Search Results page.
- ❖ In the Filtered by section on the left, click Save Changes.
- ❖ Click Yes in the confirmation window.

DELETE A SAVED SEARCH

- ❖ Navigate to Contracts > Contracts > Views Saved Searches
- ❖ In the left menu click the folder that contains the searches you want to change.
- ❖ Click Delete to delete the search.