

THIS TRAINING IS FOR UNTS/UNT/UNTD CAMPUSES. HSC CAMPUS SHOULD FOLLOW THE CURRENT PROCESS FOR SUBMITTING CONTRACTS IN HSC TCM.

≡ What is Total Contract Manager (TCM)?



What is TCM?

Total Contract Manager (TCM) is a web-based tool to assist with contract administration and is designed to enable organizations to manage the complete lifecycle of contracts from authoring to approval. It's one of the modules in UNTS Marketplace.

TCM is a way to submit contracts to the Office of Contract Administration when submitted from the department or division; contracts may also be submitted by the Strategic Sourcing Department when an RFP (Request for Proposal) is involved. For questions on how best to submit a contract to the Office of Contract Administration email us at UNTScontractadmin@untsystem.edu.

≡ Access and Using TCM in UNTS Marketplace

Access to Records in TCM

Access to contract records in TCM is granted by roles and permissions. You may have limited access to certain sections of Contract Records depending on your role/permissions. If you don't find a contract or information you would like access to, contact the UNTS Office of Contract Administration for assistance.



Logging in to TCM

The information in TCM is the property of the University of North Texas System. Your use of this resource represents an agreement to abide by the UNT System Board of Regents Rules, federal and state laws, as well as institutional policies and our UNTS Values.

Logging in to TCM is easy!

UNT SYSTEM™
Office of Finance

About Us Tools, Training, Calendars Travel Vendor Resources Payroll & Taxes Procurement Budget & Planning Treasury Controller

Home » Procurement » Marketplace

Marketplace

- Go to Marketplace
- Training
- Supplier Management
- FAQs
- Communications
- Cooperatives
- Strategic Sourcing
- Conflict of Interest in Purchasing and Contracting

Get excited!
With UNT System Marketplace, you will be able to browse catalogs, contracts, or place orders to suppliers through a "non-catalog"...



- Navigate to:
<https://finance.untsystem.edu/procurement/marketplace/index.php>
- Select the "UNT System Marketplace" link in the GET EXCITED! Section
- Enter your EUID username and password

Submitting a Contract Request



DISCLAIMER



- > The instructions provided herein are for submitting PCARD & Clickwrap contracts **ONLY** at this time.
- > Other contract submissions will be made available in FY 2024.

PCARD AGREEMENT

- > Agreements/contracts that contain Terms and Conditions and/or signature and will be paid with a **PCARD** (instead of a Purchase Order).
- > **Compliance with the Purchasing Card Guide is still required.**

CLICKWRAP AGREEMENT

- > **CLICKWRAP** agreements are online purchases where clicking "I Agree" is committing the UNTS or one of its component institutions to the vendor's terms and conditions.
- > **Compliance with State of Texas Laws and institutional policies is still required.**

As a reminder, the UNTS Office of Contract Administration can accept some contract submissions via a Contract Request in TCM (see CL Training and Frequently Asked questions for more detail). We can assist with contract negotiations at any time so email us at our department email address or call our office if you need assistance during the negotiation of your business contract.

For help whenever you need it, please also see the Quick Reference Guides and Job Aids available on our UNTS website: <https://finance.untsystem.edu/contract-administration/total-contract-manager.php>.

Submitting a Contract Request in TCM



You must have the "Department Liaison" role in TCM to submit contracts.

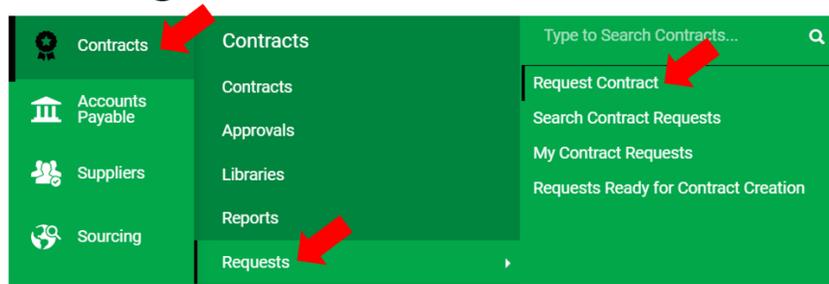
- > To acquire the role, the Department Head/Chair whose area has cause to enter into contractual agreements on behalf of the institution, selects a department Contract Liaison(s) by completing the online form:
- > <https://finance.untsystem.edu/contract-administration/contract-liaisons.php>
- > Once training is complete, and the delegated Contract Liaison has logged in to UNTS Marketplace, the Contract Liaison will then be granted the permissions ["Department Liaison" role in TCM] to submit Contract Requests.



You are completing this training to learn about TCM and to be able to submit contracts to us via TCM.

Step-by-Step

- I. Navigate to *Contracts > Requests > Request Contract* or (if applicable) use the Quick Link on the Default Contract or Contract Liaison dashboards:



2. Complete the Contract Request Name - Enter a name for the contract request.
3. Select a Contract Request Template. Click the magnifier icon and select the template which best describes the contract being submitted.
 - **Select the PCARD-CLICKWRAP Agreement Request July 2023**

4. Click *Submit*. The contract request opens to the Instructions page, which provides information regarding the contract request. Click *Next*.
5. The **Attachments** page displays any attachments that have been added to the contract request template. Add the attachments you want to include in the contract request and click *Next*.
6. On the **Questions** page, complete the series of questions (* means required field) and complete the fields as directed. Click *Save Progress*, then *Next*.
 - See Exhibit A for an outline of the questions
7. Click *Review and Complete*.
 - The Section column displays areas of the contract request that must be completed before it can be submitted.
 - The Progress column displays a green check to the right of the step name if all required fields have been configured for that step, or the system will indicate that information is missing. If information is missing, return to the request and enter the missing data.
8. Once the contract request is ready to submit, click the *Complete Request* button, then click *Yes* in the Confirmation window.

[Searching for Contract Request in TCM](#)

Step-by-Step

1. Navigate to *Contracts > Requests > My Contract Requests* or use the Quick Links shortcut.
 - Click *Filter Contract Requests* to filter search results by contract request status.
 - Select the checkbox next to each status that applies to the contract requests that you want to display.
2. Click *Apply*. Contract requests that match the filter criteria are listed.

[My Contract Requests](#)

The **My Contract Requests** page allows contract requesters to see the requests they created and the status of those requests. You can also view, edit or create a new contract request from this page. To ensure you see all of the Contract Requests you have entered, check the filters and ensure that all of the Request statuses are selected:

My Contract Requests

Filter Contract Request

Request Status [★]

- Approved
- Incomplete
- Rejected
- Returned
- Under Review
- Completed

Apply

General View of Contract Routing in TCM and Statuses

The graphic below represents a very general view of contract routing in TCM.



1	2	3	4
First step, the Buyer/Pcard team/Department Contract Liaison submit a CONTRACT REQUEST in TCM.	When OCA receives the Contract Request, OCA will review the Request and the contract. If there are no questions or concerns, they will generate a Contract Record in TCM from the Request. OCA will also determine necessary approvals and begin routing the contract for those approvals.	The various contract approvers will either approve the contract, make revisions, or recommend that OCA not proceed with a contract.	When OCA has a final version of a contract that is ready for signature, they will obtain all signatures via DocuSign (when possible) and complete the Contract Record in TCM. You will find the fully executed contract on the Contract Record in the Attachments section.

REMEMBER....a Contract **Request** is different than a Contract **Record**....

Let's review the difference between the statuses on Contract Requests and Contract Records below.

Contract REQUEST

Incomplete = Request not yet submitted

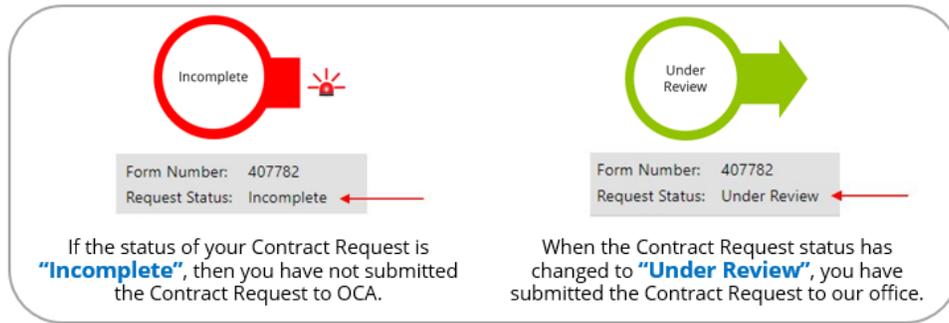
Under Review = OCA has received it, not yet processed

Approved = OCA approved REQUEST, no contract yet

Completed = Contract REQUEST is complete and OCA has generated a contract RECORD.

Rejected = Contract REQUEST will not be processed (Example: duplicate)

Returned = Contract REQUEST has been returned to the Requestor for revisions/corrections



Contract RECORD

Draft = Under construction and has not been submitted for approvals or signatures

Internal/External Review = Sent to a reviewer outside of the workflow process in TCM. (Example: OGC)

Pending approval = workflow approval

Pending/Out for signature = contract routing for signatures

Executed = Approved and active or will not be in effect until its scheduled start date



Questions?

Contact:

UNTS Office of Procurement, Office of Contract Administration

Department Email: UNTScontractadmin@untsystem.edu

HSC External webpage: <https://www.unthsc.edu/fiscal-services/>

HSC Internal webpage: <https://insite.unthsc.edu/fiscal-services/contract-administration/>

UNTS OCA webpage: <https://finance.untsystem.edu/contract-administration/index.php>

Explanation of Questions Section of the Contract Request in TCM

All questions/fields with an * are required



You must have the “Department Liaison” role in TCM to submit contracts.

Group 1: Department Contact Information

- I.1 Requesting Entity *Required
 - (UNT, UNT Dallas, UNT System, UNT HSC)
- I.2 What Requestor role do you have? *Required [Depending on the answer, the conditional questions will appear]
 - (BUYER, PCARD Team, Department)
- I.3 Name of Requestor *Required *Conditional </>* [If I.2 is answered “BUYER or PCARD team”]
- I.4 Department *Required
- I.5 Department Contact Name *Required
- I.6 Department Contact Email *Required
- I.7 Department Contact Phone Number

Group 2: IT Questions

IT approval can be acquired by submitting a Technical Acquisition Questionnaire (TAQ) that is available within ServiceNow. The TAQ must now be completed, and an IT Compliance Release obtained prior to submission of the requisition & routing of the contract.

The link to the TAQ is available at the System IT, Acquisition of Technology Resources page:
<https://itss.untsystem.edu/divisions/mrs/it-compliance/technology-risk-assessment-program.php>.

- 2.2 Is this IT related? *Required Yes No [If answered “Yes”, then the conditional questions will appear]
- 2.2 Does the product already have IT approval? *Required
- 2.3 Upload IT approval *Required *Conditional </>* [If 2.2 is answered “Yes”, you’ll need to upload the approval document]
- 2.4 Does the product already have TX-RAMP certification? Yes No [If answered “Yes”, then the conditional questions will appear]
- 2.5 Upload TXRAMP approval *Required *Conditional </>* [If 2.4 is answered “Yes”, you’ll need to upload the approval document]

Group 3: Purchase Information

For **PCARD** agreements, describe the items or service to be purchased, and the purpose.

For **CLICKWRAP** agreements, describe the items or service to be purchased and the purpose. Print a PDF copy of the terms and conditions and attach them in the Attachments section of the Contract Record and/or paste the URL in the designated field below.

Timelines for contract processing and execution are estimated and can take more or less days depending on the complexity of the contract, applicable contract approvals (including responses/approvals from external parties), the volume of contracts currently in process, the availability of the University staff to process and the availability of all signatories (both internal and external) to execute contracts.

- 3.1 Summary *Required (The contract Summary field is a field that describes a contract's general nature or purpose, its SLA, or instructions regarding its use.)
- 3.2 Date Needed By *Required
- 3.4 Is this a Pcard purchase? *Required Yes No [If answered “Yes”, then the conditional questions will appear]
- 3.4 Pcard purchase categories *Required *Conditional </>* [If 3.4 is answered “Yes”, select the category]
 - Catering, Goods, Events & Services Hotel, Other
- 3.5 Is this a Clickwrap purchase? *Required Yes No [If answered “Yes”, then the conditional questions will appear]

EXHIBIT A

- 3.6 URL address *Required **Conditional </>** [If 3.5 is answered “Yes”, you’ll need to insert the URL]
- 3.7 Were any additional approvals obtained? *Required Yes No [If answered “Yes”, then the conditional questions will appear]
- 3.8 Which additional approvals obtained? *Required **Conditional </>** [If 3.7 is answered “Yes”, select which approvals]
- Legal Approval, Office of General Counsel (all contracts require legal review unless exempt)
 - Compliance approval (conflict of interest, fair market value analysis)
 - Facilities approval (leases/utility resources)
 - Human Resources approval (contractor/employee relationship?)
 - Marketing approval (use of University logo, seal, etc.)
 - Telecommunications approval (phone service services provided internally or by UNT System)
 - Other approval not listed here
- 3.9 Approval(s) added to the attachments section? *Required Yes No
- 3.10 Total Contract Value *Required
- 3.11 Type of Agreement *Required [Depending on answer, then the conditional questions will appear]
- New Agreement
 - Amendment/Addendum/Change Order
 - Renewal
- 3.12 Existing Contract Number *Required **Conditional </>** [If 3.11 is answered “Amendment/Addendum/Change Order or Renewal”, enter the previous TCM Contract Number (if known). If *not* know, enter “UNKNOWN” in the field]
- 3.13 Additional Information

Group 4: Vendor Information

- 4.1 Vendor Name *Required
- 4.2 Vendor Contact Name *Required
- 4.3 Vendor Email Address *Required
- 4.4 Vendor Phone Number