

Searching for Contracts

Total Contract Manager (TCM)



Contracts

What is Total Contract Manager (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.
- › **The Office of Contract Administration can assist with questions and negotiations but only *officially* begins working a contract when received via a Contract Request in TCM.**



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BSC Purchasing



Contract Admin.



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Access to Records in TCM



Contracts



› 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. If you don't find a contract or information you would like access to, contact the Office of Contract Administration for assistance.

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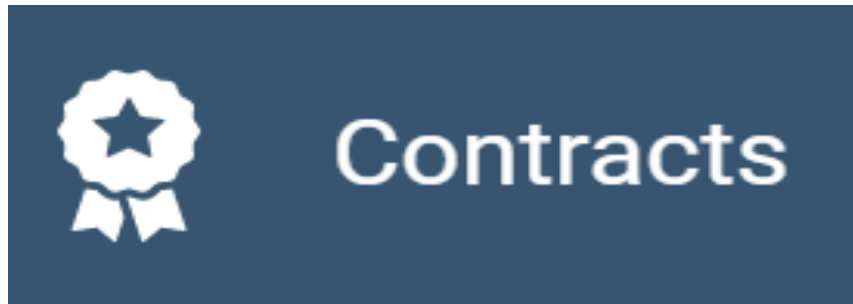
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Contracts Modules



DISCLAIMER

The functionality is the same for both TCM contract modules. Searching may be different because of varying field options. Otherwise, the steps shown in this presentation are the same. All users can search for contracts, but results and access will vary depending on your user permissions and system licenses. If you often search for the same things, you can save your search settings in a saved search to use again.





UNT SYSTEM™

Contracts ▶ Contracts ▶ Search Contracts

< Back to Results 1 of 12 Results >

Draft Once done authoring, reviewing, and negotiating this contract, submit it for This contract must be in a Fully Executed status before it can be made acti

Contracts Type to Search Contracts...

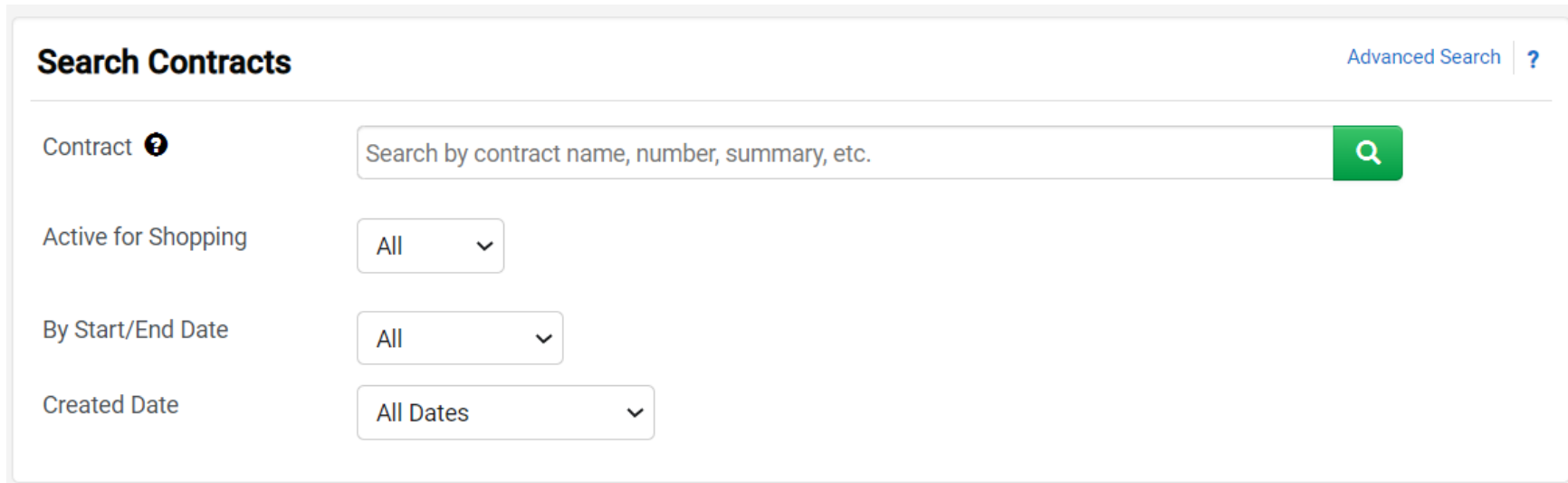
- Contracts
- Approvals
- Libraries
- Reports
- Requests
- Contract Administration

- Contracts Home
- Search Contracts
- View Saved Searches
- Search Contract Attachments
- Create New Contract...
- Create and Manage Export Templates
- Contract Import/Export...
- Search Contract Parties
- Add Contract Party...
- Contract Party Import/Export...
- View Import/Export Results
- External Contacts



Types of Searches

- › There are two ways to search, and which type to use depends on what you're looking for:
 - Use **Simple Search** when you may not have all the information you need and want to search based on partial information. The system will search all contract fields for each keyword entered, providing you with a broad results set.



The screenshot shows the 'Search Contracts' interface. At the top right, there is a link for 'Advanced Search' with a question mark icon. Below the title, there is a search input field with a magnifying glass icon on the right. The input field contains the placeholder text 'Search by contract name, number, summary, etc.'. Below the search field, there are three filter options, each with a dropdown menu:

- Contract ⓘ: Search by contract name, number, summary, etc.
- Active for Shopping: All
- By Start/End Date: All
- Created Date: All Dates

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Types of Searches

- › There are two ways to search, and which type to use depends on what you're looking for:
 - Use **Advanced Search** when you have exact data or a complex set of values that you want to search for, e.g., you have a contract number, or want to apply multiple search filters to limit the number of search results. The system only returns results that are an exact match to the values entered.



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Toggle between “Simple Search” and “Advanced Search” with this link.

[Simple Search](#) ?

Search Contracts - Advanced

Contract Number

Contract Name

Keywords

Contract Type


Contract Status

Contract Version Type


Contract Manager

Any Me Pick...

Contract Stakeholder

Any Me Pick...

Summary

Second Party

Any of All of

Department

By Start/End Date

Created Date

Approvals Completed


 

Scheduled Termination Date

Contract Term Extended

Include Archived

Contract Ended Early

Reporting Commodity Code

Understanding search results

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- UNTHSC Signatories

The screenshot shows the 'Contract Search Results' page in the UNT System Marketplace. The interface includes a top navigation bar with 'Contract' and 'Search (Alt+Q)' options. A left sidebar contains navigation icons and filters, with callouts 1, 2, and 3 pointing to the 'Search Details', 'Refine Search Results', and 'Show on Supplier Portal' sections respectively. The main content area displays search results for three contracts, with callout 4 pointing to the 'Contract Search Results' header. Each contract entry includes details such as contract number, second party, start/end dates, version type, and status.

1 Search Details

2 Refine Search Results

3 Show on Supplier Portal

4 Contract Search Results

Contract Search Results

Page 1 of 200 1-20 of 4000 Results

Sort by Best Match 20 Per Page

Contract Details

N-15853
Nestec, Ltd. - Yang
Second Party: Nestec, Ltd. Start Date: 9/1/2013 Version Type: Original
Contract Type: Research Grant End Date: 12/31/2014 Renewal No.: 0
Status: Expired Amendment No.: 0
Extension Count: 0

N-15714
AMS Sciences, LLC / Tenfold Technologies, LLC, dba Agrigen Sciences
Second Party: AMS Sciences, LLC / Tenfold Technologies, LLC, dba Agrigen Sciences Start Date: 3/1/2014 Version Type: Original
Contract Type: Research Grant End Date: 8/31/2014 Renewal No.: 0
Status: Expired Amendment No.: 0
Extension Count: 0

N-15598a
Brookdale Senior Living
Second Party: Brookdale Senior Living Inc. Start Date: 7/1/2013 Version Type: Original
Contract Type: Research Grant End Date: 6/30/2014 Renewal No.: 0
Status: Expired Amendment No.: 0
Extension Count: 0

Understanding search results

1. Back to Search/Start Over

a. Selecting Back to Search will return you to the search page with all of our previous search criteria intact. Selecting Start Over takes you to a brand new search with no criteria entered.

2. Filtered by

a. This section displays the filters/values by which your search results are filtered. Initially, any search criteria you entered will be displayed. As you add filters, the Filtered by section will update to reflect the new filters. From this section, you can also remove a single filter by de-selecting the associated checkbox or click the remove all link to remove all the filters. The Export Search button allows you to export the search results.

3. Refine Search Results

a. Search results can be refined by using the post-search filters. Below each filter, the available values display. The number of contracts associated with that value displays beside the value. Click on a value to filter the search results. Note: The filters and values displayed will vary based on your organization's set up and your individual permissions.

4. Contract Search Results

a. The search results display in a list and include the following information:

- i. Contract No. - The contract number. Click on the number to view the Contract Record
- ii. Contract Name - The contract name.
- iii. Second Party Name - The second party or on the contract, i.e., who the contract is with.
- iv. Contract Type - The contract type.
- v. Status - Indicates where the contract is in the contract workflow.
- vi. Start Date/End Date - The start and end date of the contract.

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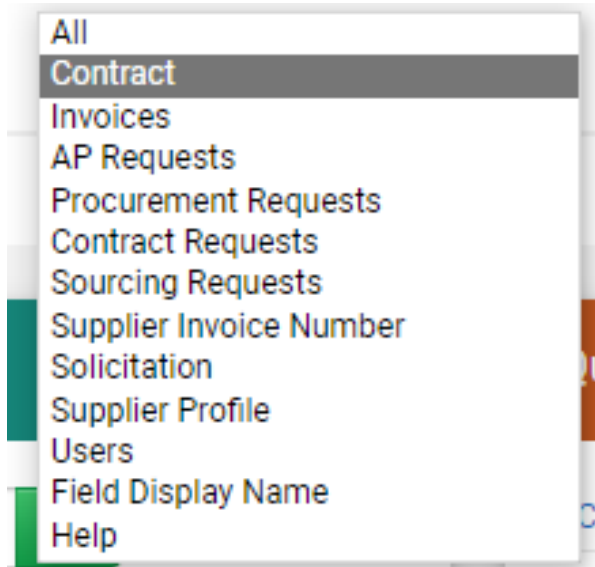
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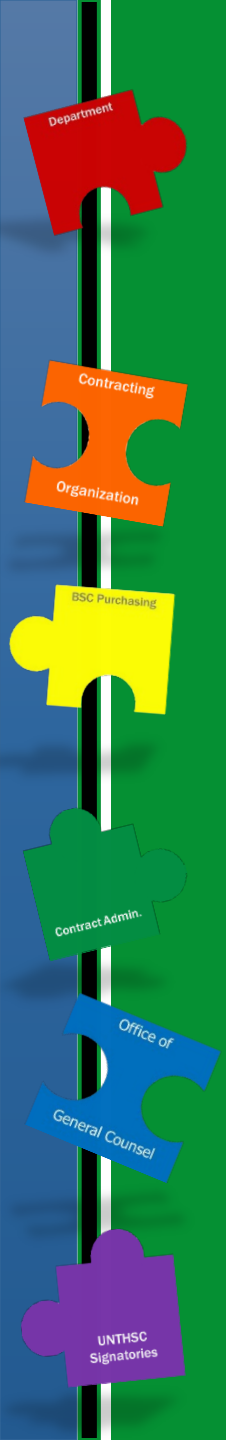
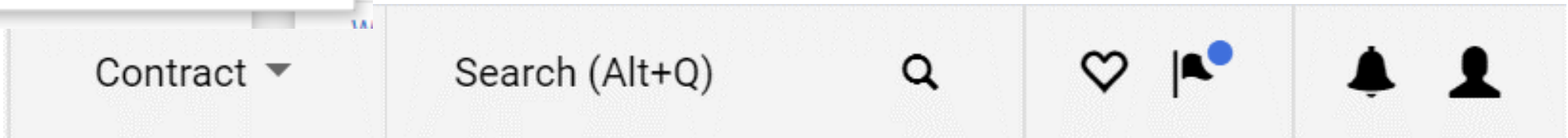
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Searching for Contracts



This search is a “global” search of the TCM system that is recommended when you are not sure where in the system you might find the information for which we are looking. Be sure to filter - see example dropdown menu on the left.

Top Navigation Bar



TCM Guides and Job Aids

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Office of Finance

[About Us](#) [Tools, Training, Calendars](#) [Travel](#) [Vendor Resources](#) [Payroll & Taxes](#) [Procurement](#) [Budget & Planning](#) [Treasury](#) [Controller](#)

[Home](#) → [Contract Administration](#) → Total Contract Manager

Contract Administration

[Total Contract Manager](#)

[Contract Liaisons](#)

[FAQs](#)

[Meet the Staff](#)

[Policies and Procedures](#)

[Training & Resources](#)

[Contract Reporting](#)

[Click-Wrap Approval](#)

Total Contract Manager

Total Contract Manager (TCM) is the contract lifecycle management system for *business* contracts administered by the Office of Contract Administration (OCA).

TCM allows full automation of the contract lifecycle, which includes:

- automated contract requests
- contract reviews and edits
- electronic approval workflow
- integrated electronic signature capability
- automated event notifications such as renewal and expiration dates
- departmental visibility of contracts
- a complete contract document repository

COMING SOON!


TCM will be available to UNTS, UNT and UNTD campus users during calendar year 20

 [TCM Quick Reference Guides & Job Aids](#)

[Quick Reference Guide - TCM](#)

[Quick Reference Guide - Reports & Searches](#)

[Quick Reference Guide - Notifications](#) (coming soon)

 [TCM 30-minute Help Sessions](#)

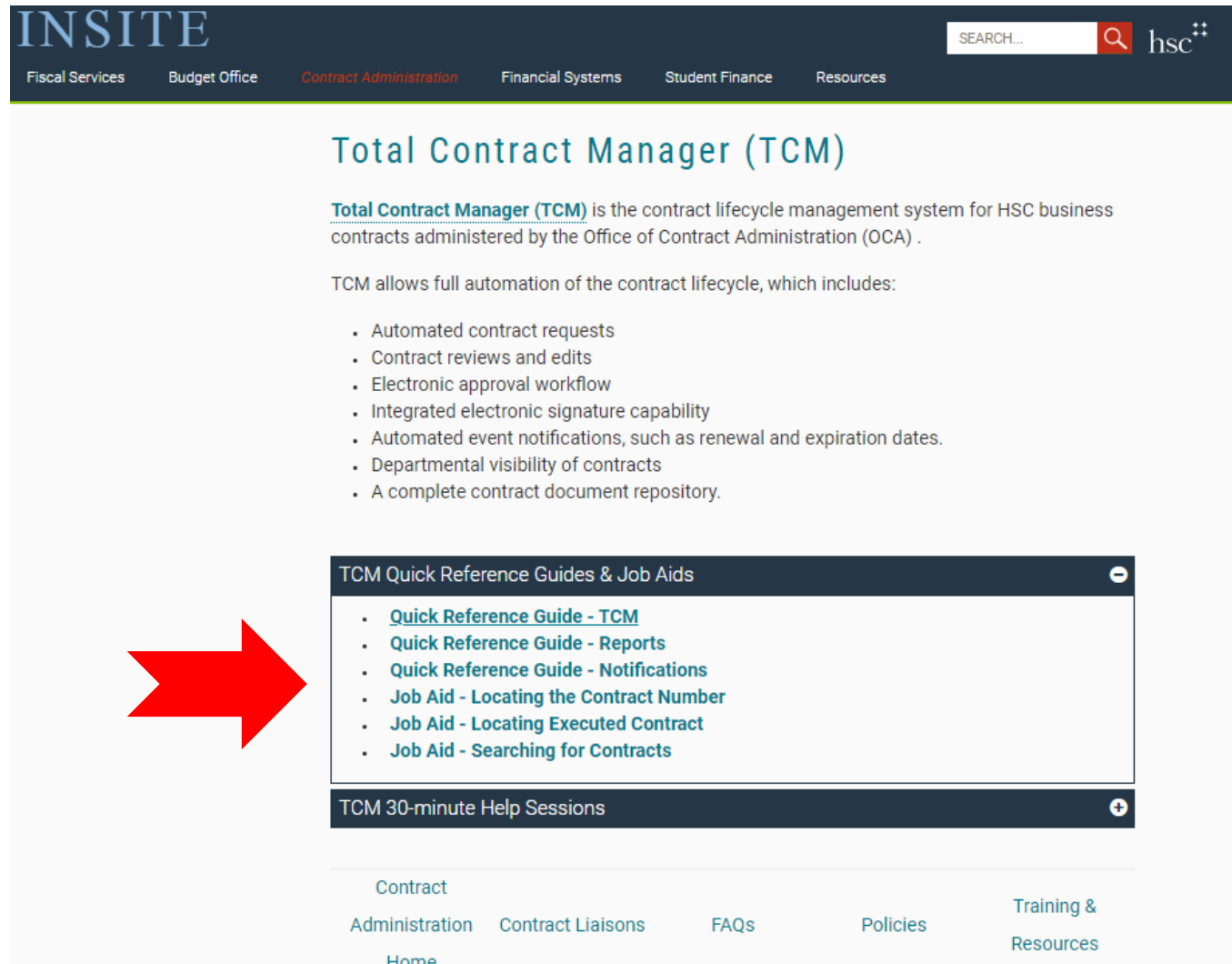



hsc

Use the HSC TCM.
DO NOT Submit
Contract Requests
here.



TCM Guides and Job Aids



The screenshot shows the INSITE website interface. At the top, there is a navigation bar with the following links: Fiscal Services, Budget Office, **Contract Administration**, Financial Systems, Student Finance, and Resources. A search bar is located on the right side of the navigation bar. Below the navigation bar, the main content area features the title "Total Contract Manager (TCM)" in a large, blue font. Underneath the title, there is a paragraph describing TCM as the contract lifecycle management system for HSC business contracts administered by the Office of Contract Administration (OCA). Below this paragraph, there is a list of features that TCM allows, including automated contract requests, contract reviews and edits, electronic approval workflow, integrated electronic signature capability, automated event notifications, departmental visibility of contracts, and a complete contract document repository. At the bottom of the main content area, there is a dark blue box titled "TCM Quick Reference Guides & Job Aids" which contains a list of links: Quick Reference Guide - TCM, Quick Reference Guide - Reports, Quick Reference Guide - Notifications, Job Aid - Locating the Contract Number, Job Aid - Locating Executed Contract, and Job Aid - Searching for Contracts. Below this box is another dark blue box titled "TCM 30-minute Help Sessions". At the very bottom of the page, there is a footer with links for Contract Administration, Contract Liaisons, FAQs, Policies, Training & Resources, and Home.

INSITE SEARCH... hsc

Fiscal Services Budget Office **Contract Administration** Financial Systems Student Finance Resources

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TCM Quick Reference Guides & Job Aids

- [Quick Reference Guide - TCM](#)
- [Quick Reference Guide - Reports](#)
- [Quick Reference Guide - Notifications](#)
- [Job Aid - Locating the Contract Number](#)
- [Job Aid - Locating Executed Contract](#)
- [Job Aid - Searching for Contracts](#)

TCM 30-minute Help Sessions

Contract Administration Contract Liaisons FAQs Policies Training & Resources Home

