Searching for Contracts

Contracts Contracts Total Contract Manager (TCM)

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 UNTS 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.

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

Searching in TCM

1. 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.
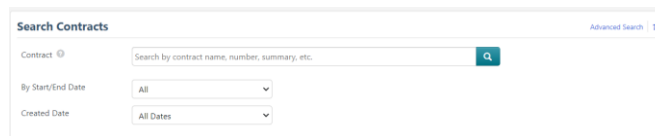

Figure 1

   • 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.

Figure 2

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. To learn how to save a search, see the [Quick Reference Guide - Reports & Searches](#).

SUGGESTIONS FOR SEARCHING

2. In UNTS Marketplace, you can search for the requisition # or the Vendor (external party) name in the "Contract Name" field

VIEW IN SIMPLE SEARCH	VIEW IN ADVANCE SEARCH
Figure 3	*Figure 4*

3. To search by the Vendor (external party) name, search the "Second Party" field on Advanced Search

Figure 5

4. **hsc** *Total Contract Manager* In HSC-TCM, you can search for your Contract REQUEST and access the Contract RECORD hyperlink.

- **UNT SYSTEM™ MARKETPLACE** *Total Contract Manager* In UNTS Marketplace, you can also use these steps if you submitted the Contract REQUEST.

Searching when YOU have submitted the Contract REQUEST
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 contracts 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:
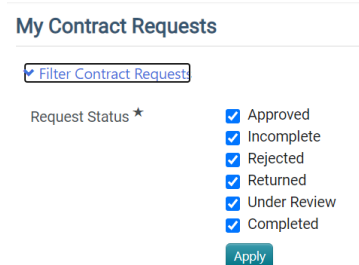
UNDERSTANDING THE SEARCH RESULTS

Note: Contracts that don't expire will display "No Expiration" in the End Date column on the Contract Search Results page. This is to distinguish them from contracts that are in Draft status and will not have an end date set until they are approved and active.

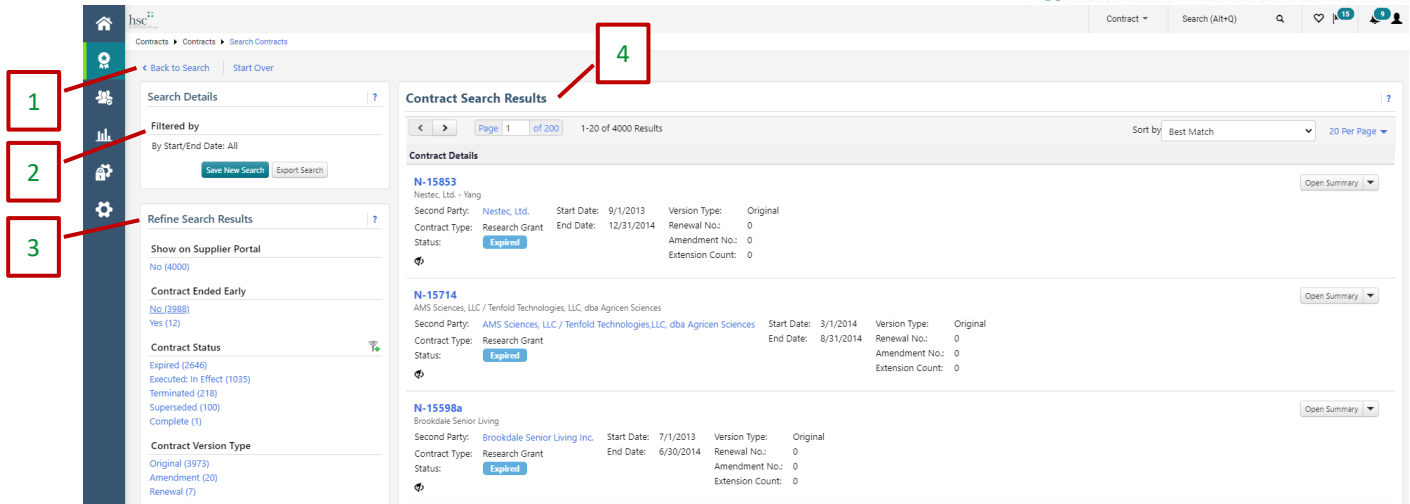The image below shows an example of the contract search results.

Figure 6

5. 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.

6. Filtered by

   b. 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 are click the remove all link to remove all the filters. The Export Search button allows you to export the search results.

7. Refine Search Results

   c. 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.

8. Contract Search Results

   d. 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

DIRECTIONS TO TCM GUIDES AND JOB AIDS

HSC Campus	UNTS/UNT/UNTD campuses
https://myunt.sharepoint.com/sites/HSCFinanceWebsite/SitePages/Total-Contract-Manager-(TCM).aspx	https://finance.untsystem.edu/contract-administration/total-contract-manager.php

For additional help, contact:

UNTS Office of Contract Administration | UNTS Office of Procurement
Department Email: UNTScontractadmin@untsystem.edu

HSC External webpage: https://www.unthsc.edu/division-of-finance/contract-administration/
HSC Internal webpage: https://myunt.sharepoint.com/sites/HSCFinanceWebsite/SitePages/Contract-Administration.aspx

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