

Total Contract Manager (TCM) is a module within UShop intended to house all of the university's procurement-based\* contracts.

\* Procurement-based refers to contracts that are the result of a competitive bid, sole source approval, or other procurement process.

## The TCM Module Provides:

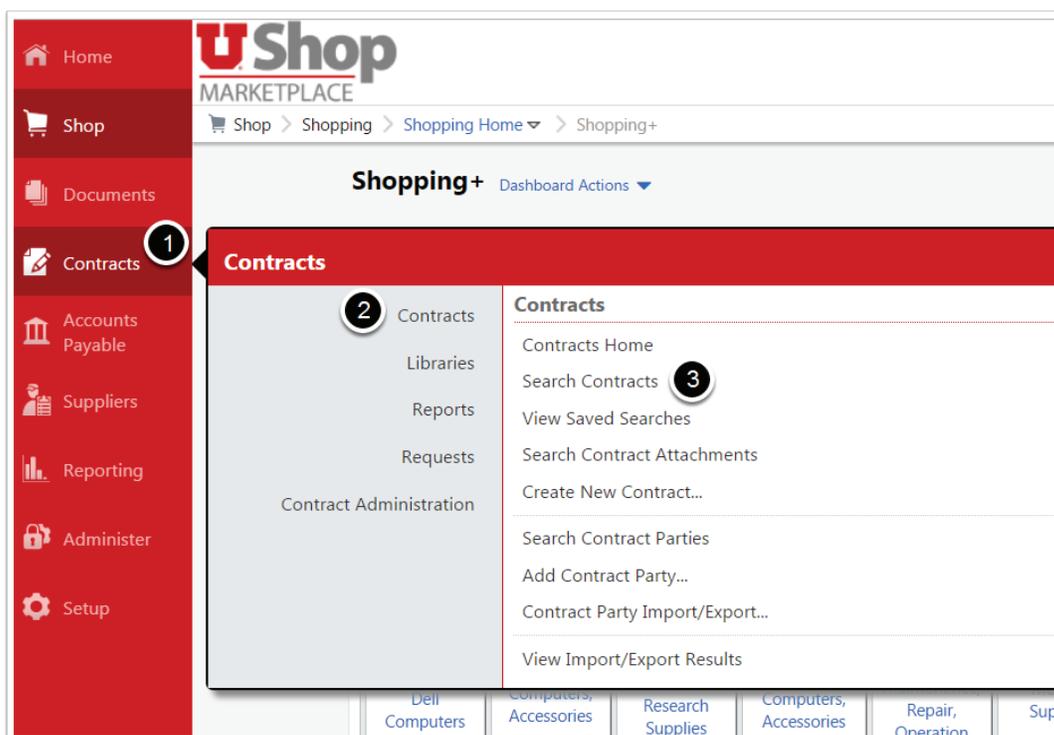
- Streamlined management of procurement-based contracts through collaboration, approval and compliance.
- Preset alerts to notify of upcoming contract renewal or expiration.
- Transparent compliance with both State and Federal procurement laws.
- Broader platform for negotiating and securing procurement based contracts.
- Repository for all procurement contracts, providing one place to store and research contracts specific to departmental procurement needs.
- Electronic access to all university contracts, both Inactive (department-specific) and Active (Campus -wide).

**NOTE:** "Active" contracts are available campus wide. These are primarily the University's contracts with Punch Out suppliers.

"Inactive" contracts are owned by the specific department for which a competitive bid was conducted.

## 1. To Search for contracts in TCM:

1. Click on the Contracts link in the left hand tool bar.
2. Hover over Contracts.
3. Click on Search Contracts.



## 2a. To conduct a Simple Search:

1. Type the contract name, number, or summary, etc. Or, you may click the spyglass to search all.
2. To filter your search, you may select Active to see contracts available campus-wide, or Inactive for contracts specific to a department(s).

**Search Contracts**

Contract **1** Pinnacle

Active for Shopping **2** Inactive ▼

By Start/End Date

- All
- Active
- Inactive

## Desktop:

3. By Start/End Date: select Effective to find current contracts, or other options as applicable.
4. When all selections are made, click the spyglass to search.

**Search Contracts**

Contract Pinnacle **4**

Active for Shopping Inactive ▼

By Start/End Date **3** Effective ▼

- All
- Effective
- Expired
- Future
- No Expiration
- Custom

## 2b. To conduct an Advanced Search:

After clicking on Search Contracts, click on the Advanced Search link.

**U Shop** MARY LOUISE HUGHES 282 5,750.00 USD Search (Alt+Q)

Contracts > Contracts > Search Contracts > Search Contracts Logout

**Search Contracts** **Advanced Search** ?

Contract Search by contract name, number, summary, etc.

Active for Shopping Inactive ▼

By Start/End Date Effective ▼

## This opens a search engine with many optional criteria.

You may add as much or little information as you have about the contract in question, then click Search.

### Note:

1. "Second Party" refers to the awarded supplier.
2. "Work Group" refers to the name of the department that owns the contract.

**Search Contracts - Advanced** Simple Search ?

Contract Number:

Contract Name:

Keywords:

Contract Type:

Contract Status:

Contract Version Type:

Contract Manager:  Any  Me  Pick...

Summary:

Second Party:  **1**

Work Group:  **2**

By Start/End Date:

Created Date:

Approvals Completed:

Scheduled Termination Date:

Contract Term Extended:

Contract Ended Early:

Reporting Commodity Code:

Include Additional Commodity Codes

Expand All | Collapse All

## 3. You will see a list of all contracts that meet your specified criteria.

1. For each contract listed you can see the Contract Name.
2. Contract Type and Status, The Start and End dates, and whether it is Active for Shopping.
3. For additional information, click Open Summary.

**Contract Search Results** ?

1-1 of 1 Results Sort by: Best Match | 20 Per Page

**Contract Details**

**UURF2017206** **1**  
Pinnacle Accounting Consulting Agreement **3** Open Summary

Second Party: PINNACLE ACCOUNTANCY GROUP PLLC

Contract Type: Single Award Supplier

Status: **Executed: In Effect** **2**

Start Date: 4/23/2015

End Date: 4/22/2020

Active for Shopping: No

Version Type: Original

Renewal No.: 0

Amendment No.: 0

Extension Count: 0

## On the Summary page you will find the:

1. Contract type\*: in this case, Single Award Supplier indicates that one department conducted a bid that was awarded to one supplier.
2. Project: This refers to the name of the department that owns this contract.
3. Second Party: The name of the awarded supplier(s)
4. Contract Manager(s): These may include a Purchasing Buyer, a department contact, etc.
5. Attachments: This will include a copy of the actual contract.

### Summary of Contract # UURF2017206

Header		Dates And Renewal	
Contract Name *	Pinnacle Accounting Consulting Agreement	Start Date	4/23/2015 12:00 AM MST
Contract Type	1 Single Award Supplier	End Date	4/22/2020 12:00 AM MST
Project *	2 University of Utah Research Foundation	<b>Contract Managers</b> 4	
First Party *	University of Utah	LIMHER MONTOYA	lmontoya@purchasing.utah.edu +1 (801) 585-1841
Second Party *	3 PINNACLE ACCOUNTANCY GROUP PLLC	MICHAELA CHERYL PARKIN	mparkin@purchasing.utah.edu
Summary	No Text Entered		

> **Additional Details**

▼ **Attachments** 5

Contract was fully executed on 3/9/2017 and uploaded on 3/9/2017.

[Fully Executed Contract](#) (680 KB)

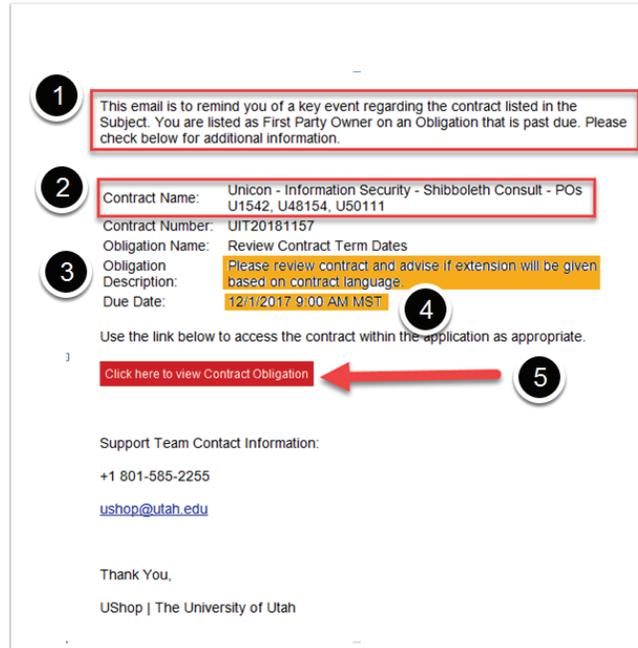
No attachments have been added.

### \*Contract Types:

- Multiple Award Supplier - 1 Department : Many Suppliers
- Price Agreement Supplier - Sole Source
- Single Award Supplier - 1 Department : 1 Supplier
- Campus Wide Supplier - All Departments on Campus : 1 supplier
- Campus Wide Multiple Supplier - All Departments on Campus : Multiple Suppliers

## 4. Notification of an Obligation (required Action) on a contract in TCM

1. If you are listed as a Contract Manager on a contract, you will receive an email notification when an Obligation, or Action, is required on the contract.
2. The Contract name is given.
3. The Obligation Description indicates what action is required.
4. The Due Date for the obligation is given.
5. Click on the link in the email to view the contract.



## 5. Complete the Obligation on the Contract

1. Note that the obligation description and due date are listed.
2. Click on the contract number to open the contract and perform all actions as directed in the obligation description.
3. When you are finished, mark the obligation as complete.

The screenshot shows a table with the following columns: Obligation Description, Obligation Status, Obligation Due Date, Obligation Completed Date, Completed By, First Party Owner, Second Party Stakeholder, Contract Number, Contract Name, Contract Status, Contract Type, Second Party (Primary), and Contract Manager. A red box highlights the Obligation Description and Due Date fields, with a callout **1**. A red box highlights the Contract Number field, with a callout **2**. A red box highlights the "Mark as Complete" button, with a callout **3**.

Obligation Description	Obligation Status	Obligation Due Date	Obligation Completed Date	Completed By	First Party Owner	Second Party Stakeholder	Contract Number	Contract Name	Contract Status	Contract Type	Second Party (Primary)	Contract Manager
Please review contract and advise if extension will be given based on contract language.	Overdue	12/1/2017 9:00 AM MST	-	-	LISA B KUHN	-	UIT20181157	Unicon - Information Security - Shibboleth Consult - POS U1542, U48154, U50111	Complete	Single Award Supplier	-	ROBERT EDWARD TINEY SHIRSTIN E DAY LISA B KUHN MARY LOUISE HUGHES

If you have questions about TCM, please contact:

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