

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:

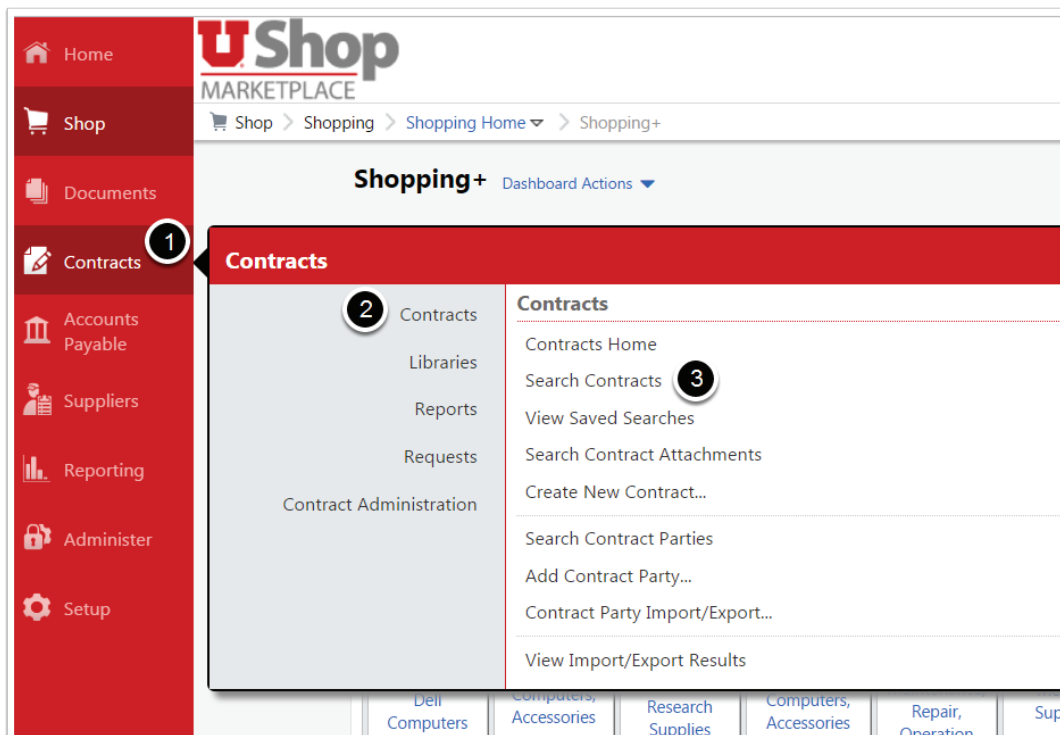
- Streamlined management of procurement-based contracts through collaboration, approval and compliance.
- Preset alerts to notify of upcoming contract renewal or expiration.
- Transparent compliance with both State and Federal procurement laws.
- Broader platform for negotiating and securing procurement 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).

The screenshot shows the 'Search Contracts' form. Step 1 is indicated by a circled '1' next to the 'Contract' input field, which contains the text 'Pinnacle'. A red search button with a magnifying glass icon is to the right of the input field. Step 2 is indicated by a circled '2' next to the 'Active for Shopping' dropdown menu, which is currently set to 'Inactive'. The dropdown menu is open, showing options: 'All', 'Active', and 'Inactive' (which is highlighted in blue). The 'By Start/End Date' field is visible but not yet interacted with.

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.

The screenshot shows the 'Search Contracts' form. Step 3 is indicated by a circled '3' next to the 'By Start/End Date' dropdown menu, which is currently set to 'Effective'. The dropdown menu is open, showing options: 'All', 'Effective' (highlighted in blue), 'Expired', 'Future', 'No Expiration', and 'Custom'. Step 4 is indicated by a circled '4' next to the red search button with a magnifying glass icon.

2b. To conduct an Advanced Search:

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

The screenshot shows the UShop Marketplace interface. At the top, there is a red header bar with the UShop logo, user information (MARY LOUISE HUGHES), a star icon, a flag icon, a notification bell with '282', a shopping cart with '5,750.00 USD', and a search bar with 'Search (Alt+Q)'. Below the header, there is a breadcrumb trail: 'Contracts > Contracts > Search Contracts > Search Contracts'. A red arrow points from the 'Search Contracts' link in the breadcrumb trail to a yellow button labeled 'Advanced Search' with a question mark icon. Below the 'Advanced Search' button, the 'Search Contracts' form is visible, with the 'Contract' input field containing the placeholder text 'Search by contract name, number, summary, etc.' and a red search button with a magnifying glass icon. The 'Active for Shopping' dropdown is set to 'Inactive' and the 'By Start/End Date' dropdown is set to '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

Type to filter...

Contract Status

Type to filter...

Contract Version Type

Contract Manager

Any Me Pick...

Name, User Name, Email

Summary

Second Party

1

Work Group

2

By Start/End Date

All

Created Date

All Dates

Approvals Completed

All Dates

Scheduled Termination Date

All Dates

Contract Term Extended

Contract Ended Early

Reporting Commodity Code

Code, Description

☐ Include Additional Commodity Codes

Any of All of

Type to filter...

Type to filter...

All

All Dates

All Dates

All Dates

Code, Description

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			
Pinnacle Accounting Consulting Agreement			
Second Party:	PINNACLE ACCOUNTANCY GROUP PLLC	Start Date:	4/23/2015
Contract Type:	Single Award Supplier	End Date:	4/22/2020
Status:	Executed: In Effect	Active for Shopping:	No
Version Type:	Original	Renewal No.:	0
Amendment No.:	0	Extension Count:	0

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Open Summary

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	Contract Managers 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)

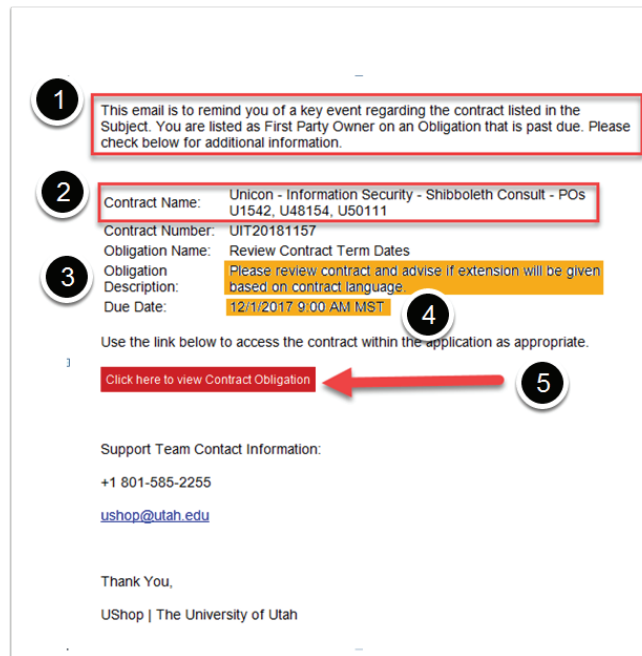
No attachments have been added.

*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.

action	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	
view act Dates	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	Mark as Complete Mark as Complete Properties

If you have questions about TCM, please contact:

Mike Smith (msmith@purchasing.utah.edu)