

## SEARCH CONTRACTS

In Total Contract Manager (TCM), the *Search Contracts* page is key to locating the contracts you need.

### ACCESS TO RECORDS IN TCM

The Office of Contract Administration is managing access to information in TCM by departments. If you do not have access to the information or receive an error message, you may not have a User role or be listed within the department that permits access. Contact the Office of Contract Administration for assistance: Email: [contractadmin@unthsc.edu](mailto:contractadmin@unthsc.edu).

In the navigation menu on the left of the screen, select the Contracts icon, then Contracts, then Search Contracts.



Figure 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.

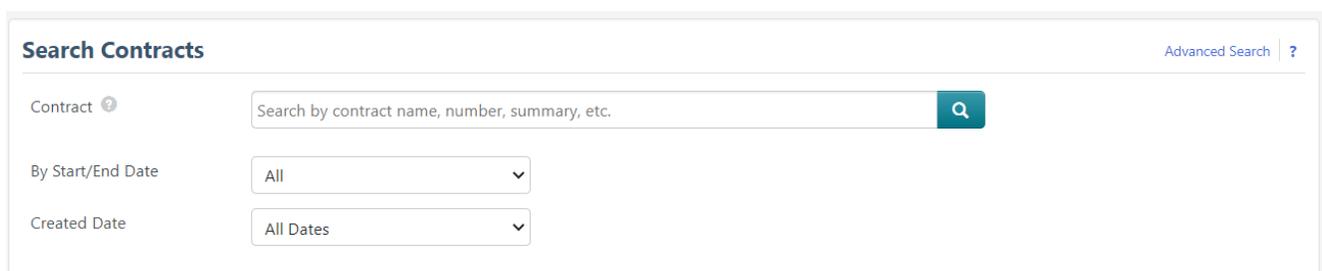
A screenshot of the 'Search Contracts' page. The page has a header with the title 'Search Contracts' and a link for 'Advanced Search' with a question mark icon. Below the header is a search bar with the placeholder text 'Search by contract name, number, summary, etc.' and a magnifying glass icon. There are two dropdown menus: 'By Start/End Date' with 'All' selected, and 'Created Date' with 'All Dates' selected.

Figure 2

- 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.

Toggle between "Simple Search" and "Advanced Search" with this link.

**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  Any of  All of  [Type to filter...](#)

Division  [Type to filter...](#)

By Start/End Date  All

Created Date  All Dates

Approvals Completed  All Dates

Scheduled Termination Date  All Dates

Contract Term Extended

Include Archived  No

Contract Ended Early

[Expand All](#) [Collapse All](#)

[Contract Value](#)

[Contract Party Options](#)

[Custom Contract Fields](#)

[Renewal](#)

Figure 3

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.

## 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.

# OCA Job Aid

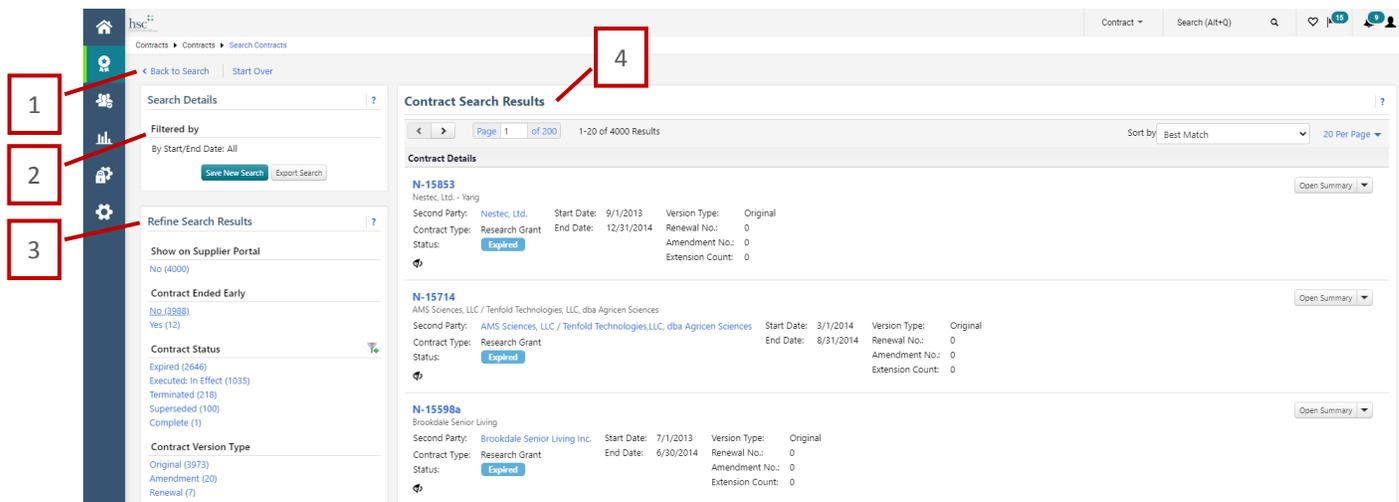


Figure 4

## 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.