

TCM: Adding a Contract Party

Overview

- This job aid is intended for employees who will need to:
 - Add a Contract Party in TCM

Note: This Job Aid will not be applicable for contracts where the Second Party has been registered as a Supplier in Oracle. The Supplier Registration process should occur prior to a Contract Request, and should apply to Goods and Services contracts. For non-goods and services contracts, the Contract Manager may need to add a contract party in TCM.

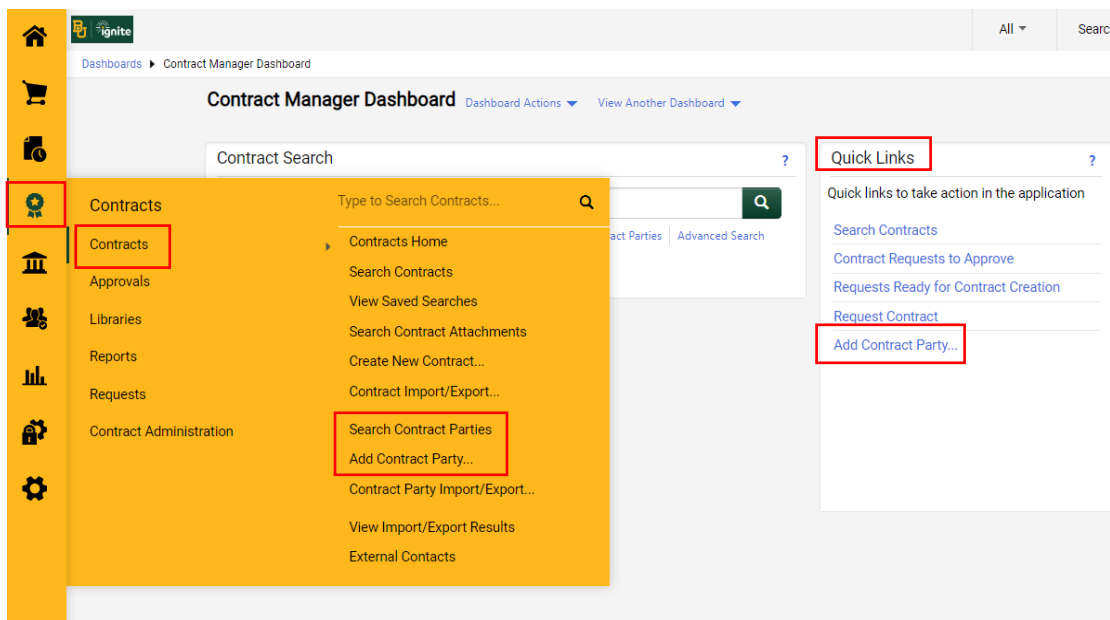
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I. Accessing Total Contract Manager (TCM)

1. TCM Live Environment is accessible at: baylor.edu/tcm. Use this site to explore current contracts, add new contracts, or access the contract templates available for future contracts on behalf of Baylor University.
2. A Test and Training Environment is also available at: baylor.edu/tcmtest. Please use this site if you are new to TCM and need to practice navigating the system, entering contract requests, etc.
3. Both sites can be accessed using your Bear ID and Password.

2. Add a Contract Party

1. Verify that the Second Party is not already in TCM. From the Contract Manager Dashboard, click the Award icon, then select **Search Contract Parties**.
2. After verifying the entity or individual is not already in TCM, click **Add Contract Party** from your dashboard **Quick Links** OR from the dashboard, click the **Award** icon, select **Contracts**, then select **Add Contract Party**.



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3. Add Contract Party window.
 - a. **Is this Contract Party an “Owner” Type:** Always select **No**. Baylor is the only “Owner” contract party in TCM.
 - b. Select appropriate **Contract Party Type:**
 - i. **Customer:** Baylor is supplying the second party with goods or services.
 - ii. **Other:** Second party does not fit into one of the other categories.
 - iii. **Partner or Affiliate:** Second party is teaming with Baylor through a partnership or affiliation agreement.
 - iv. **Supplier:** Supplier registration should be completed via Oracle; the supplier’s information will be automatically synced with TCM, and therefore a new second party should **not** be created.
 - v. **Name:** Enter the legal name of the supplier. For example, if the second party is Roadrunner Charters, Inc., the second party should be entered as such, as opposed to shortened names or abbreviations, such as Roadrunner; or Roadrunner Charter.
 - c. Select **Add Contract Party** when complete.

Add Contract Party ×

Is this Contract Party an "Owner" Type? ★ Yes No

Contract Party Type ★

Customer

Other

Partner or Affiliate

~~Supplier~~

Name ★

Tax ID Number

★ Required

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4. **Add Contact persons and Addresses** to the Second Party profile by selecting the **Contacts and Locations** tab. Click on the **Contacts** tab and then click **Add a Contact** and enter in the Second Party Contact information. Proceed in the same manner with **Addresses**.

The screenshot shows the profile page for Hawthorne Independent School District. The left sidebar has 'Contacts and Locations' selected, with 'Contacts' and 'Addresses' sub-items highlighted in a red box. The main content area shows the 'General' tab with the following fields:

- Supplier Name: Hawthorne Independent School District
- Doing Business As (DBA):
- Other Names:
- Country of Origin: (dropdown)
- Aliases:
- Supplier Number: No Value (Edit)
- Third Party Reference Number: No Value (Edit)
- JAGGAER Supplier ID: 1002143451
- Is this Supplier instance an Organizational Node?: Yes (radio), No (radio)
- Contract Party Types: 2 Values Selected (Edit)
- Active for Shopping: (checkbox)
- Legal Structure: (dropdown)
- Tax Identification Number: (input)
- Are you exempt from backup withholding?: Yes (radio), No (radio)
- Does your business have a DUNS number?: Yes (radio), No (radio)
- Web Site URL: (input)
- RSS Feed URL: (input)

- a. It is important that both Contact information and Addresses are entered for the Second Party so that this information can be pulled into the applicable Baylor template.

The screenshot shows the 'Add a Contact' form. The 'Add a Contact' button is highlighted in a red box. The 'Contact Information' form fields are also highlighted in a red box:

- Name: John Smith
- Type: Other (dropdown)
- Contact ID: (input)
- 3rd Party ID: (input)
- Active: (checked checkbox)
- First Name: John
- Last Name: Smith
- Title: Superintendent
- Email: baylorcontracts@gmail.com
- Phone: (input)
- Toil Free Number: (input)
- Fax Number: (input)
- Notes: (text area, 700 characters remaining)

Once Contact and Address details have been added, click Save.