

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.

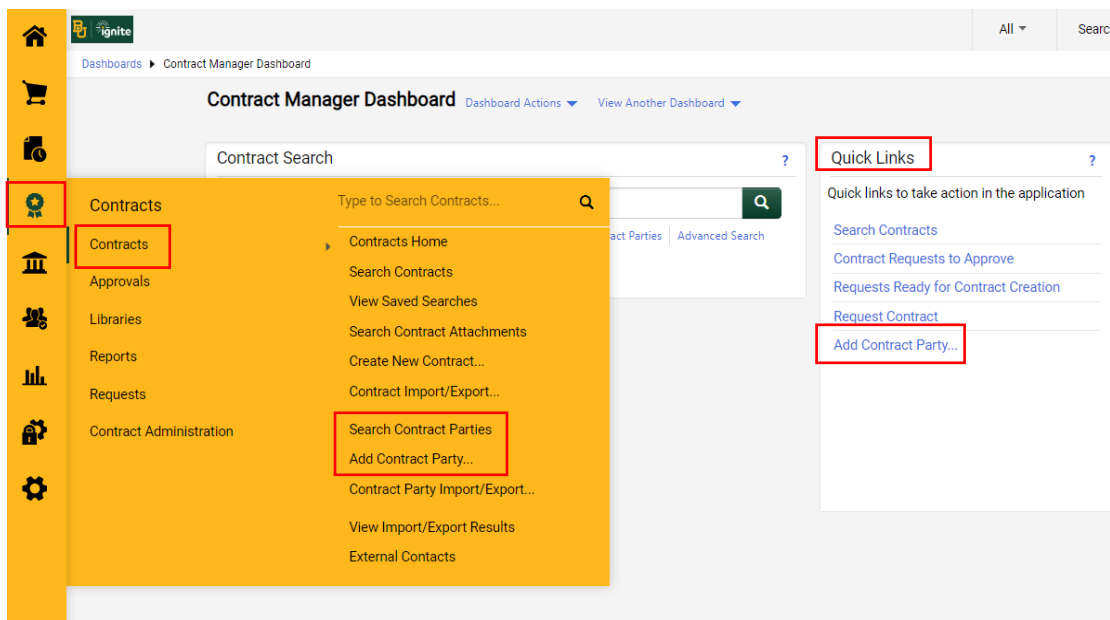
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I. Accessing Total Contract Manager (TCM)

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

The screenshot shows the profile page for Hawthorne Independent School District. The left sidebar has a menu with 'Contacts and Locations' selected, and sub-items 'Contacts' and 'Addresses' highlighted with a red box. The main content area is titled 'General' and contains a 'Company Information' section with various fields for supplier details.

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

- 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 'Contacts' section of the Hawthorne Independent School District profile. The left sidebar has 'Contacts' selected. The main content area has an 'Add a Contact' button highlighted with a red box. Below it is a 'Select a Contact' dropdown and a 'Contact Information' form with fields for Name, Type, Contact ID, 3rd Party ID, Active status, First Name, Last Name, Title, Email, Phone, Toll Free Number, Fax Number, and Notes.

Contact Information	
Name	John Smith
Type	Other
Contact ID	
3rd Party ID	
Active	<input checked="" type="checkbox"/>
First Name	John
Last Name	Smith
Title	Superintendent
Email	baylorcontracts@gmail.com
Phone	
Toll Free Number	
Fax Number	
Notes	