

TOTAL CONTRACT MANAGER

Training Resources b2p.procurement.harvard.edu/contract-management
Support buytopay_procurement@harvard.edu



STAKEHOLDER KEY INFORMATION

Total Contract Manager (TCM) is the contract management module within the Buy-to-Pay system. If you are listed as a Stakeholder on a TCM contract record, you may view all information on that contract record and receive notifications about that contract. The link to Buy-to-Pay is found on <https://huit.harvard.edu/finance>.

The purpose of this document is to highlight information and features that are most likely to be of interest to a Stakeholder. All documents referenced in this document can be found on the Training Resources site, the link is provided at the top of this document.

When in TCM, information about the page you're on is available by clicking on the [?](#) in the upper right corner.

You may view a contract by clicking on the link provided in a TCM email notification or using one of the TCM search features.

Email Notifications

If set up to do so, the Stakeholder will automatically receive contract related TCM email notifications from Buy2Pay. The most frequently sent notifications are contract expirations and renewals. Below is an example of an End Date (expiration) email notification.

From: Buy2Pay <donotreply@harvard.edu>
Sent: Monday, May 3, 2021 12:00 AM
To: Knapp, Paul <paul_knapp@harvard.edu>
Subject: NUHARBOR SECURITY INC Contract No. SOW-001358 End Date - Advance Notices



Re: KEY DATE NOTIFICATION for NUHARBOR SECURITY INC SOW-001358

Dear Paul Knapp,

Contract Name: NuHarbor - Splunk OCI Integration SOW - HBSIT

This email is to remind you of a key event regarding the contract listed in the Subject.
Please check below for additional information.
Notification Type: End Date - Advance Notices
End Date - Advance Notices: 6/1/2021 11:59 PM EDT

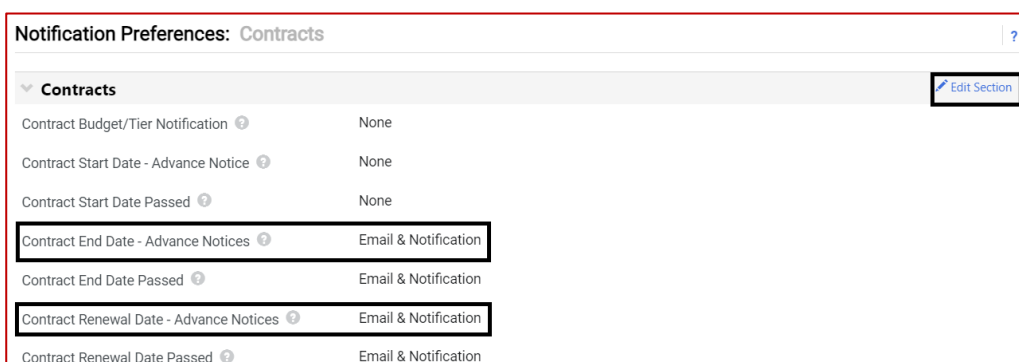
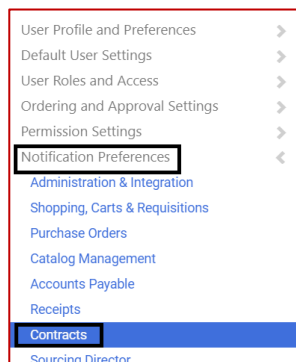
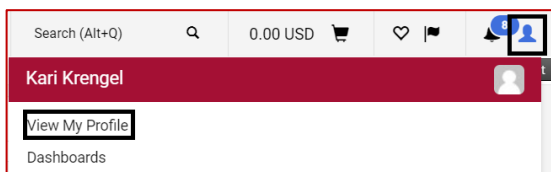
Use the link below to access the contract within the application as appropriate.

[View Contract](#)

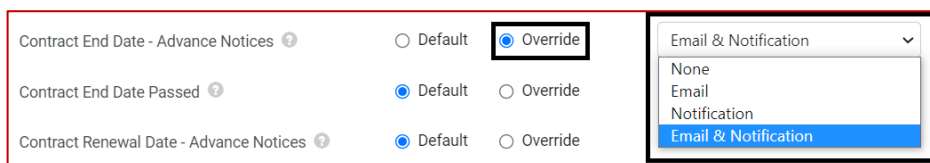
The contract record can be viewed in TCM by clicking on the View Contract link found towards the bottom of the email.

You will receive an automated notification if the Contract Manager has set it up on the contract record and you have opted in on your User Profile.

To opt into notifications, open your User Profile by clicking on the silhouette icon in the upper right, then click View My Profile; click Notification Preferences on the left, then click Contracts. If you want to change a preference, click Edit Section. There are many notifications, the most common are the End Date and Renewal Date Advance Notices.

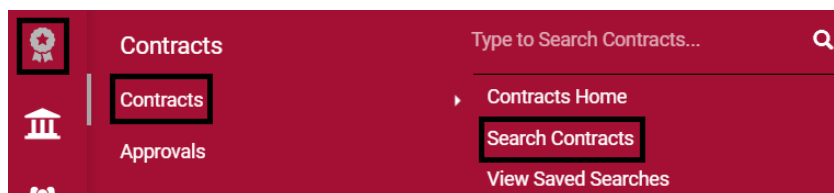


If the Default setting doesn't include Email, click Override and change to one of the Email options.

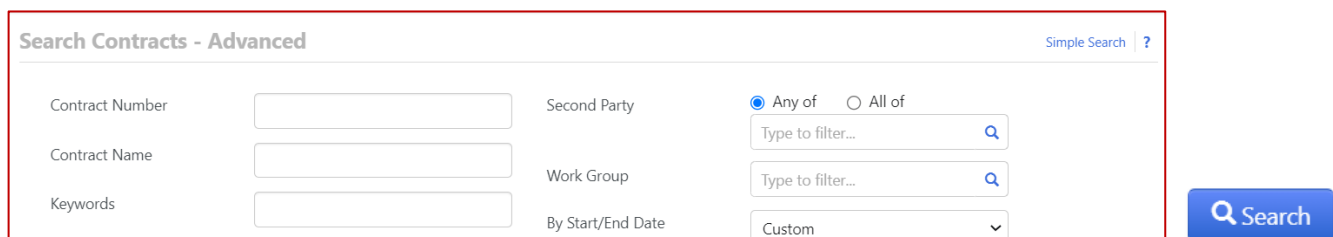


Search

The most common and robust TCM search feature is Search Contracts, found on the Contracts menu.



In the upper right corner of the search you can toggle between Simple Search and Advanced Search. Common search filters are Contract Number (if known) or Second Party (the supplier's name). After entering one or more filters, click Search in the bottom right.



From the Contract Search Results, click on the Contract Number to access the contract record.

Contract Search Results

1-6 of 6 Results

Contract Details

AGRMT-000081

EULA for HUIT

Second Party: ADOBE SYSTEMS INCORPORATED Start Date:

For more information, refer to Contract Search on the Quick Reference Guides tab of the Training Resources site.

Contract Record

The contract record is broken into sections. There is a menu that runs down the left side of the contract record that enables navigation from one section to another.

Summary

Work Group * 175 - Harvard University IT Setting: No

Header ✓

Technology Accessibility ✓

Alternative Language 0

Attachments 2

Scorecards 0

Obligations 0

Review Rounds 0

Approvals

eProcurement Setup

Budget and Spend

Applies To

Goods and Services

PO Clauses

Comments 0

Communication Center 0

Users and Contacts

Notifications

Contract Family

Summary

Steve Burns Contract Manager Email: burns@fas.harvard.edu

Service Owner: Courtney Harwood Email: courtney_harwood@harvard.edu

Contract Parties

Name	Currently Visible	Type	Contact	Contract Address
President and Fellows of Harvard College		First Party (Primary)	-	-
ADOBE SYSTEMS INCORPORATED	✗	Second Party (Primary) ⓘ	-	29322 NETWORK PL CHICAGO, Illinois, 60673-1293 US

Dates and Renewal

Time Zone *	EDT/EST - Eastern Standard Time (US/Eastern)	Renewals Remaining	-
Start Date *	5/27/2020 12:00:00 AM	Automatically Apply Price File with Renewal	No
End Date *	Expires On 5/26/2023 11:59:59 PM	Renewal Term	3 Years
Review Date	-	Auto-Renew	No
Review Term	-		
Reviews Remaining	-		


Additional Details

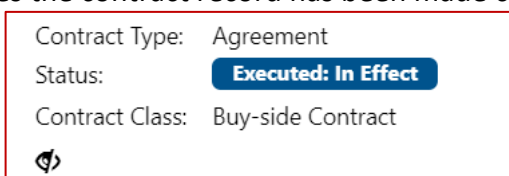
Contract Purpose

General Purpose * ⓘ Technology

The key sections are:

- **Header**
 - Contains the following key information: Contract Number, Contract Name, Work Group (tub that owns), Contract Parties, Dates and Renewal, Contract Purpose, Acting By and Through.
 - For a list of all fields, refer to the Contract Header Field Guide on the Resources tab of the Training Resources site.
- **Attachments**
 - Contains the Main (contract) Document and any supporting documents.
- **eProcurement Setup**
 - Indicates if the contract is Active for Shopping; meaning requisitions, POs, and invoices can be linked to this contract.
 - The ability to link to this contract may be restricted, see Applies To on the next page.
- **Budget and Spend**
 - If a requisition/PO/invoice is linked to this contract, the related spend is captured in this section.

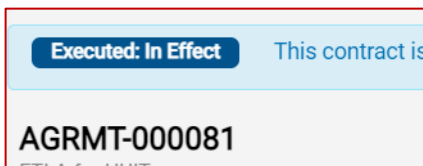
- Applies To
 - If the contract is Active for Shopping, this section indicates if there are any limitations on who can link to this contract.
 - If on the TUB or Role tab the Business Units with access to this Contract is set to Confidential; review the Additional Users tab to see who, if anyone, may link a requisition/PO/invoice to this contract.
- Users and Contacts
 - Lists the Contract Manager(s) and Stakeholder(s).
 - **If you have a question about or would like a change made to the contract, contact the Contract Manager.**
 - Indicates if the contract has been made confidential, which limits access to this contract record to the Contract Manager(s) and Stakeholder(s) listed (also see Applies To above).
 - Also, when viewing Contract Search Results; a  in the lower left corner of the Contract Details indicates the contract record has been made confidential.



- For more information on Users and Contacts, refer to Contract Record Visibility on the Quick Reference Guides tab of the Training Resources site.

- Notifications
 - Shows what notification types will be sent to who and when.
 - For more information on Notifications, refer to Contract Notifications on the Quick Reference Guides tab of the Training Resources site.
- Contract Family
 - Lists any contracts related, parent or child, to this contract.
- Summary
 - The Summary section at the top of the menu provides visibility to much of the key information, but not all.

No matter what section you are viewing, the Contract Status appears in the upper left corner.



Reminder that information about and training on TCM can be found within TCM by clicking on the  in the upper right corner or on the [TCM Training Resources site](#).