



# WESTERN CONTRACT MANAGEMENT MODULE

## Global and Quick Searches

### Global Search

This search is run from the home page and will quickly show all contract records containing a specific keyword(s) in any field of the record.

#### Locate the Global Search toolbar

- Once logged in, locate the **search toolbar** on the right side of the home page
- Enter the search keyword in the search box
- Specify if you want to search across all public WWU contracts, or within your submitted contracts
- Click **“Go”**

The screenshot shows the ESM Contract User Portal interface. At the top left is the 'esm solutions' logo. On the right, it says 'User: Test1 | Logout'. A navigation bar contains tabs for 'Home', 'Submit a Contract', 'My Contracts', 'WWU Contracts', 'My Approvals', 'Vendor Scorecards', and 'My Profile'. The main content area is titled 'ESM Contract User Portal' and features several tiles: 'My Profile' (Manage your user profile), 'Request/Submit a Contract' (Submit a new contract), 'My Contracts' (View your previously submitted contracts), 'WWU Contracts' (View all public WWU contracts), 'My Approvals' (All contracts pending your approval), and 'Vendor Scorecards' (Create a Vendor Scorecard). A search toolbar is located in the top right corner, highlighted with a red box. It contains a search input field with the text 'conference', a 'Go' button, and two radio buttons: 'WWU Contracts' (selected) and 'My Contracts'.

- Depending on the search selection, the system will open the **My Contracts** or **WWU Contracts** tab upon executing the search.

### Quick Search

This search feature is accessed directly from the contracts table and is designed for non-recurring searches to find specific records, with more searching functionality than the global search.

#### Bring up the Quick Search bar

- Select either **My Contracts** or **WWU Contracts**
- From the contracts table, click on the word **“Search”** or the magnifying glass icon, located on the right side of the table toolbar.

## Contracts: My Contracts

Status: 75 record(s) found, 3 page(s) [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page  [Go](#)

New Actions

Views Search

<input type="checkbox"/> Edit	ID ↓	Contract Title	Contracting Party	Contract Start Date	Status	Contract Administrator	Unit Contract Admin Team Name	Renewal Type
<input type="checkbox"/>		<a href="#">2021 Rehab Counseling Internship</a>	PeaceHealth St. Joseph Medical Center	<a href="#">09/01/2018</a>	Draft		Contract Administration Team	Manual Renewal
<input type="checkbox"/>		<a href="#">2015 Test Contract</a>	Bellingham Tennis Club	<a href="#">08/15/2018</a>	Draft		Contract Administration Team	None
<input type="checkbox"/>		<a href="#">1998 Service</a>	Bellingham Public Library	<a href="#">08/28/2018</a>	Submitted for Review		Contract Administration Team	None

- This will bring up the **Quick Search** bar above the table.

## Contracts

Status: More than 100 record(s) found [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page  [Go](#)

Search:  contains  [Go](#)

Show All  Refine  String  Context  Active Only [More Options](#)

New Actions

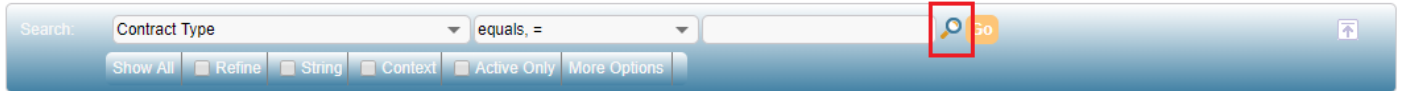
<input type="checkbox"/> Edit	ID ↓	Contract Title	Contract Department	Submitter Name	Contracting Party	Contract Owner/Financial Manager
<input type="checkbox"/>		<a href="#">2220 Kelly's Piano</a>	UR - Univ...	Kellie Edwards	Kelly's Piano Service	Leonard Jones
<input type="checkbox"/>		<a href="#">2214 Sustainable Communities...</a>	Office of...	Lindsey MacDonald	City of Ferndale	Seth Vidana

### Set up the Quick Search

- **Field** box: the first input box (*TEXT*) contains a drop down list of all contract fields within the record that can be searched.
  - Example: **“Contract Type”** or **“Contracting Party”**
  - Select a specific field
  - Selecting **“-TEXT-“** will search within all the available fields
- **Operator** box: the next input box (*contains*) defines the operator of the search and
  - Example: **“equals, =”** or **“contains”** or **“is more than, >”**
  - The operator selection will change depending on the input of the field box.
    - A numeric or choice field vs. a text field
- **Value** box: Enter the value to be searched
  - Example: **“Internships”** (for Contract Type) or **“Bellingham School District”** (for

## Contracting Party)

- To find an exact input value for a drop down field in the contract record, click the magnifying glass next to the value box.



- A new window will open with a list of inputs for that field
- Using the search bar at the top of the window can narrow down the list quickly
- This can also be used to find contracting parties if they have been entered into the system, or specific users
- Select the input by clicking the red arrow on left side of the row

Search again:   Create new

String  Context

Search in the Contract Type table and its subtables:

Contract Type  All text fields  
 All linked fields

### Contract Types

Contract Types

Status: 39 record(s) found, 2 page(s) [Click for details...](#)

Page: [First](#) [Back](#) [Last] Go to page

Edit	ID	Prefix	Contract Type	Default Workflow
		ML	Miscellaneous Legal	General Contract Review Workflow
		MI	Miscellaneous	General Contract Review Workflow
		MD	Medical	General Contract Review Workflow
		LS	Leases - Equipment	General Contract Review Workflow
		LC	Licenses - Not Software	General Contract Review Workflow
		17	INE Internships	Internship/International Partnerships/Education Abroad/Global Learning Workflow
		16	IA Inter Agency	General Contract Review Workflow
		15	HH Hold Harmless	General Contract Review Workflow
		14	GR Grant-non-RSP	General Contract Review Workflow
		13	EA Education Abroad	General Contract Review Workflow
		12	FI Financial	General Contract Review Workflow
		11	EE Extended Education	General Contract Review Workflow
		10	CS Contract for WWU Services	General Contract Review Workflow

Page: [First](#) [Back](#) [Last] Go to page

- Below these first three input boxes are more criteria options:
  - Show All checkbox – Removes all search criteria to display table records.
  - Refine checkbox – Used to search within results of an already executed search using new criteria
  - String checkbox – Select to perform a database search.
  - Context checkbox – Select to show where the search value occurs within the record result (useful for the “-TEXT-“ field input)
  - Active only checkbox – Select to display only displays active records.
- Click “Go” to run the search
- The next example photo on page 4 shows a search for Contract Type = Internships

Status: 29 record(s) found, 1 page(s) [Click for details...](#)

The screenshot shows a search interface with a search bar containing 'Contract Type' and 'Internships'. Below the search bar are several filter buttons: Show All, Refine, String, Context, Active Only, and More Options. The search results are displayed in a table with the following columns: Edit, ID, Contract Type, Status, Contract Title, Contracting Party, Renewal Type, Contract Start Date, and Contract End Date. The 'Contract Type' column is highlighted with a red box, and the 'Internships' entries in this column are also highlighted with a red box.

Edit	ID	Contract Type	Status	Contract Title	Contracting Party	Renewal Type	Contract Start Date	Contract End Date
	<a href="#">2021</a>	Internships	Draft	<a href="#">Rehab Counseling Internship</a>	PeaceHealth St. Joseph Medical Center	Manual Renewal	<a href="#">09/01/2018</a>	<a href="#">08/31/2021</a>
	<a href="#">2016</a>	Internships	Submitted for Review	<a href="#">Affiliation agreement with Star Trek Infirmary</a>	Star Trek	Automatic Renewal	<a href="#">08/02/2018</a>	<a href="#">08/02/2018</a>
	<a href="#">2003</a>	Internships	Pending Approval	<a href="#">Approval test for LW in Training</a>	Whitefish School District	None	<a href="#">08/02/2018</a>	<a href="#">08/03/2018</a>
	<a href="#">2000</a>	Internships	Submitted for Review	<a href="#">Bellingham School District</a>	Bellingham Public Schools	None	<a href="#">08/01/2018</a>	<a href="#">08/01/2024</a>
	<a href="#">1999</a>	Internships	Draft	<a href="#">BSD</a>	Bellingham Public Schools	Manual Renewal	<a href="#">08/10/2018</a>	<a href="#">08/14/2020</a>
	<a href="#">1987</a>	Internships	Draft	<a href="#">Testing_CSD HHD internship</a>	University of Washington	Manual Renewal	<a href="#">09/03/2018</a>	<a href="#">09/02/2021</a>
	<a href="#">1894</a>	Internships	Submitted for Review	<a href="#">Example Title for RCPS</a>	Zipcar, Inc.	Automatic Renewal	<a href="#">07/31/2018</a>	<a href="#">07/31/2019</a>
	<a href="#">1783</a>	Internships	Submitted for Review	<a href="#">Testing Teaching Practicum Internship template</a>	Mount Vernon School District 320	Manual Renewal	<a href="#">09/01/2018</a>	<a href="#">08/31/2021</a>
	<a href="#">1750</a>	Internships	Submitted for Review	<a href="#">ECE Student Field Experiences</a>	Bellingham Children's Theatre	None	<a href="#">07/01/2018</a>	<a href="#">06/30/2021</a>
	<a href="#">1744</a>	Internships	Inactive	<a href="#">Test Internships Approved to Form No PRO-271</a>	Cordata Elementary School Parent Teacher Association	Manual Renewal	<a href="#">06/15/2018</a>	<a href="#">06/18/2018</a>
	<a href="#">1732</a>	Internships	Pending Approval	<a href="#">PRO-271A Testing Internship approved to form Workflow</a>	Yelm School District	Manual Renewal	<a href="#">06/12/2018</a>	<a href="#">06/14/2018</a>
	<a href="#">1731</a>	Internships	Pending Approval	<a href="#">PRO-271A Testing approved to Form Internship Workflow -</a>	Whitefish School District	None	<a href="#">06/13/2018</a>	<a href="#">06/03/2021</a>
	<a href="#">1730</a>	Internships	Inactive	<a href="#">PRO-271A Internship Workflow approved to Form Yes</a>	Yelm School District	Automatic Renewal	<a href="#">06/12/2018</a>	<a href="#">06/15/2018</a>
	<a href="#">1700</a>	Internships	Draft	<a href="#">PRO Test Reject by Department Approver RN to RSN Nursing</a>	PeaceHealth	Manual Renewal	<a href="#">07/01/2018</a>	<a href="#">06/30/2022</a>

## Refining an Executed Quick Search

- It is possible to search within the results of your first search using the “Refine” option.
  - Example: You have done a search for “Contract Type” → “equals” → “Internships” and now want to search for Internships with the Bellingham School District

- From the executed search results, enter the next search criteria into the search bar
  - Example: “Contracting Party” → “equals” → “Bellingham School District 501”
- Click the “**Refine**” checkbox on the search bar

Status: 1 record(s) found, 1 page(s) [Click for details...](#)

Search: Contracting Party equals, = Bellingham School District 501 [Go](#)

Show All  Refine  String  Context  Active Only More Options

New Actions Views Search

Edit	ID	Contract Type	Status	Contract Title	Contracting Party	Renewal Type	Contract Start Date	Contract End Date
	<a href="#">1347</a>	Internships	Submitted for Review	<a href="#">Student Affiliation Agreement</a>	Bellingham School District 501	Manual Renewal	<a href="#">04/16/2018</a>	<a href="#">04/10/2023</a>