

## Quick Reference Sheet-Department and Unit Approvers Guide

### Approval Emails

CMM System Emails will be sent automatically to Department and Unit approvers to take an action. In general, Department and Unit approvers will be prompted to:

1. Review and approve a new contract or amendment, or
2. Make a renewal or termination decision about an existing contract.

Please see example of CMM System Approval and Renewal emails on Page 5. Please note in the actual CMM system the email will come from [CMMSystemEmail@wwu.edu](mailto:CMMSystemEmail@wwu.edu) (not "Contract Management Bot Test"). The links in the email **are safe to click**.

### Approval within Email

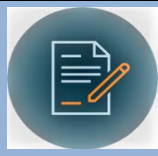
This is the best option to approve via cell phone or if you are unable to log into the CMM system

1. Key contract details are summarized in the body of the CMM generated email.
2. If this is enough information to approve the email you may click the blue "Approve"
3. You may also open contract document attached to the email to review document. **Note, making changes on this attachment will not save as a version to the contract record.**
4. Once you have reviewed, click on the Approve link to send your official approval back through the CMM system.
5. An ESM screen will pop up to confirm that the system has received your approval.
6. The system sets the workflow to move to the next approver or back to Contract Administration.
7. For unique contracts that may require approval of an employee not in an existing workflow, you will need to email from within the CMM contract record to document these as *ad hoc* approvals. This may be the case for contracts that need approval across multiple Colleges or Units.

### Approval within CMM System from the "Review" Link in the Email

If you wish to see additional contract details, add approval notes within the contract record, or disapprove/reject a contract, you must complete your review/approval within CMM.

1. Click on Review which will allow you to review and approve the contract within the CMM system.
2. Click on the Edit button in upper left corner of the screen.
3. View the contract document by clicking the attachment labeled Approval Packet files.
4. Click again on the attachment.
5. Use View to review the document without editing. Choose Edit and Checkout to make changes.
6. Selecting Edit and Checkout will save the document changes – "redlined"
7. Move back to the Approval Record tab (top of screen).
8. You may add notes to Approval Notes field which may include reasons for rejection (if any).
9. Change Approval Decision pull-down menu to Approved or Rejected.
10. Press Save.
11. The system sets the workflow to move to the next approver or back to Contract Administration.



# WESTERN CONTRACT MANAGEMENT MODULE

## Approval from the Portal

1. To approve a contract from the Portal, log in to the system.
2. Select the My Approvals tile

### ESM Contract User Portal

**Search**

Go

WWU Contracts My Contracts

**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

**Vendor Scorecards**  
Create a Vendor Scorecard

3. Your pending approvals will appear.

**Approvals: My Pending Approvals**

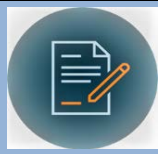
Status: 1 record(s) found, 1 page(s) [Click for details...](#)

Set Next Steps Actions Views Search

Edit	ID	Contract Title	Approval Team	Approver(s)	Approval Status/Approval Action
	<a href="#">729</a>	FIG Consultant	Department/Unit Approvers	Steven VanderStaay	Pending Approval

4. Click the Paper/Pencil edit icon. The approval screen will appear. If you click on the approval ID# (729 above) you will be sent to a summary screen. You may not take action from a summary screen. If there is no drop down selection then you will need to click "Edit". Once you hit edit the Approval screen will appear.

Sample Summary Screen – No action can be taken from this screen.



# WESTERN CONTRACT MANAGEMENT MODULE

Approval

Edit Close Details Concurrent Approvals Template Information Emails History

Collapse All

ID: 729 Contract ID: 1953

Approval Title: Department 2 Approval

Approval Decision

Approval Status/Approval Action: Pending Approval

Approval Details

Contract Title: FIG Consultant Step Number: 3

Approval Team: Department/Unit Approvers Approver(s): Steven VanderSlaay

Approval Packet Files: 1953 - FIG Consultant.docx

Refresh Approval Packet

Date Approved/Rejected: Approved/Rejected By:

Once you are the Approval Action Screen  
Sample Approval Screen

Approval

Save Cancel Details Concurrent Approvals Template Information Emails History

Collapse All

ID: 729 Contract ID: 1953

Approval Title: Department 2 Approval

Approval Decision

Select the appropriate approval decision in this field.

Approval Status/Approval Action: Pending Approval

Approval Details

Contract Title: FIG Consultant Step Number: 3

Approval Team: Department/Unit Approvers Approver(s): Steven VanderSlaay

Approval Packet Files: 1953 - FIG Consultant.docx

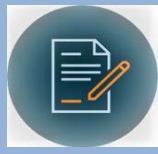
Refresh Approval Packet

5. Change Approval Decision pull-down menu to Approved or Rejected.
6. Add any notes in the Approval Note Section.
7. Press Save.

The system sets the workflow to move to the next approver or back to Contract Administration.

## Renewal Decisions – Contract Renews Automatically (“Automatic Amendment”)

1. On a contract renewal reminder date set by Contract Administration, you will receive a CMM system generated email with key contract details summarized in the body of the email.
2. Reply to the email to inform Contract Administration whether you wish to continue the contract, or terminate the contract. (**Tip, just hit “Reply All” and do not change the subject line at all.**)
3. Existing agreement in pdf formats may not be uploaded into CMM contract record yet. If you need to review the original contract to make your decision, send a request to Contract Administration to upload the document. Otherwise you may review the contract document in CMM under the “Documents” tab on the contract record.
4. Contract Administration will endeavor to update the contract record on old “legacy” contracts that



will transition into the CMM system, but when necessary, please email requests for information to Contract Administration. (i.e. you may need to ask about renewal options or specific language)

5. You may also advise Contract Administration of any corrections or changes on the system record.
6. If you wish to renew, Contract Administration will move the contract term dates forward and set a new renewal reminder date in the record.
7. If you wish to terminate, Contract Administration will provide notice to the Contractor per the terms of the contract.

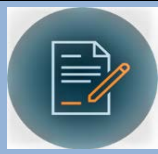
### Renewal Decisions – Contract Requires Amendment (“Manual Amendment”)

1. On the contract renewal reminder date you will receive a CMM generated email with key contract details summarized in the body the email.
2. Reply via email to Contract Administration whether you wish to continue the contract, or if you wish to terminate the contract. **(Tip, just hit “Reply All” and do not change the subject line at all.)**
3. If there are no renewal options, or the service requires competitive bidding due to type of service or dollar amount, the contract may require additional work and/or negotiation. Contract Administration will advise you regarding next steps.
4. If the existing agreement is available you may view the contract document under the Contract Record Documents Tab. When we first go live, legacy documents may not yet be uploaded into CMM contract record.
5. If a document is not available and you need it to review to make your decision, send an email request to Contract Administration to upload the document.
6. If you wish to renew, Contract Administration will move the term date forward in the record. Unlike automatic renewal contracts, Contract Administration will also need to execute an amendment to send to the Contractor to extend the term dates, or change any contract terms. You will later see an amendment document routing for approval.
7. If you wish to terminate, Contract Administration will provide notice to the Contractor per the terms of the contract.

### Other CMM System Emails

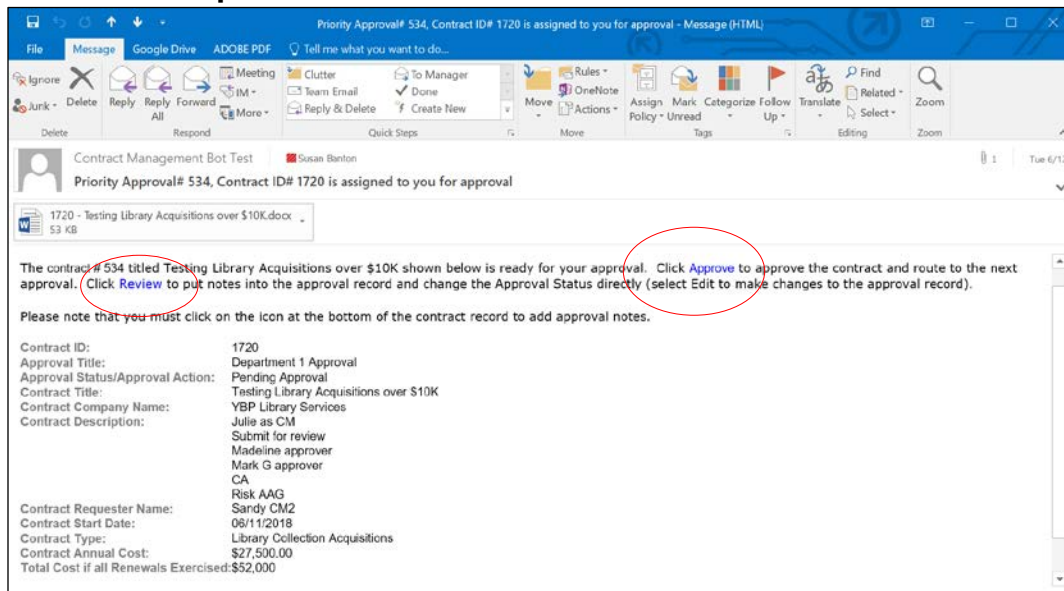
If you are a Contract Owner/Financial Manager, the CMM System Email will send you the following additional emails for your information only, no action on your part is required for CMM:

- Your contract has been moved to Completed / Inactive status. The CMM System Email will remind you to complete payment paperwork and complete an optional Vendor Scorecard to rate contractor’s performance.
- Your contract is set to be archived per Washington State retention guidelines. This places the contract and contract record in Inactive status.
- Your contract is set for destruction per retention guidelines.



# WESTERN CONTRACT MANAGEMENT MODULE

## Approval E-Mail Sample



## Renewal Email Sample: Hit reply all to respond.

