



WESTERN CONTRACT MANAGEMENT MODULE

Quick Reference: Editing your Personal View and Creating New Views

Create your custom “Personal View” of the My Contracts or WWU Contracts list, showing all Contracts that you have submitted, by specifying which fields/contract details are displayed. In addition to the Personal View, new custom views can also be created and shared with other teams.

Editing your Personal View

Opening the Personal View set-up screen

- Once logged in, click on **My Contracts**
- Hover the cursor over **Views** underneath the search bar so the drop down menu appears and select **Edit**

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Home Submit a Contract **My Contracts** WWU Co

Saved Searches: Sh

Contracts: My Contracts

Status: 65 record(s) found, 3 page(s) [Click for details...](#)

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Show All Refine String Context Active Only More Options My Contracts

New Actions

Views search

<input type="checkbox"/> Edit	ID	Contract Title	Contracting Party	Contract Start Date	Status	Contract Adminis	Renewal Type
<input type="checkbox"/>	1845	Test	Bellingham Technical College	06/28/2018	Draft		None
<input type="checkbox"/>	1836	Test Training	Washington State University, Spokane	06/28/2018	Draft		None
<input type="checkbox"/>	1835	Test- Training	University of Oregon	06/28/2018	Submitted for Review		Automatic Renewal
<input type="checkbox"/>	1801	Test	Bellingham Tennis Club	06/22/2018	Submitted for Review		Automatic Renewal
<input type="checkbox"/>	1788	Western Front Advertising	Katie's Cupcakes	06/28/2018	Submitted for Review	Katie Ik	Manual Renewal
<input type="checkbox"/>	1787	Long form services template	TerryI Asla	06/28/2018	Submitted for Review		Manual Renewal

Views dropdown menu options: New ..., Edit ..., Manage ..., Personal view, Customer contract in other table, Default View, Detail View, Export Control View, Home page view, Mobile view, Report View, Summary view, Unit Contract Summary Report, Help, Contract Administration Team

- Personal view screen will display a new table with four tabs: Fields, Order/Colors, General, and Apply
- Refer to the left side of the table for descriptions on each option

Personal view

Fields Order/Colors General Apply

Next Finish Cancel

Views define which fields of a table are displayed, how much of the field is displayed and the layout attributes of the display.

Select which options to display in this view:

Enable Checkboxes to let users select multiple records, for instance to print, mass edit, or run other actions on the selected records. You can hide this option in views where users do not have permission to modify or act on multiple records.

An Edit icon that opens the record for editing when clicked.

A View icon to open for viewing.

A dynamic Custom icon whose appearance depends upon a choice field. Define a Custom icon on the next tab by clicking the "Define Notification Icons" button.

Show selection checkboxes

Show Edit icon

Show View icon (if available)

Show Icon Column

← Descriptions

SCROLL DOWN FOR FIELD OPTIONS

Max lines per record: 3

Max lines per linked field: 1

Fields tab

- It is recommended that you start with the above settings in the reference photo for the top section and adjust as needed
 - **Show selection checkboxes, show edit icon, show icon column**
 - **Max lines per record: 3**
 - **Max lines per linked field: 1**
- Decide which fields you would like displayed in your view
- Scroll down on the **Fields** tab to choose options add the specific fields to display
 - Check **"Display"** box for each field to add to the Personal View
 - Use **Column Width** drop down menu to choose # of characters in each column

Recommendations for column widths:

Contract Title	50
Contract Type	20
Contract Start/End Dates	Automatic
Contracting Party	30
ID	Automatic
Status	20
Submitter Name	Automatic

- **"Edit"** checkbox allows a hyperlink to edit that field in the contract record
- **"View"** checkbox allows a hyperlink to only view the contract record
- Once all desired fields are selected, click **Next** button located at the top or bottom

Order/Colors tab

- Specify the order of the fields columns:
 - The fields are shown in the grey box. Select, drag, and drop the field boxes in desired order
 - In the example below, Contract End Date is selected and moved ahead of Annual Cost

Personal view

Fields Order/Colors General Apply

Back Next Finish Cancel

Create the desired layout of the table view by dragging and dropping the field boxes displayed below. Single fields, taking the whole view width, may Additional rows may also be created by 'dropping' selected fields after the last row. Any multi-column fields will appear without any field label.

ID	Record Type	Status	Contracting Party	Contract Title	Contract Start Date	Annual Cost	Contract End Date	Contract Department
No items to drag								

Set Row Coloring Define Notification Icons

Back Next Finish Cancel

- Click **Next** to General tab (skip to page 5), or continue with advanced formatting settings below

Advanced formatting settings on this tab:

- The **Set Row Coloring** option can set specific formatting (color, size, style) to a specified field depending on the value of that field, if desired
 - A new window will open with Field/Colors tabs
 - Select the field whose values will dictate the formatting (Status, in the example below) and click **Next**

Field Colors

Next Finish Cancel

The display attributes (background color and font color, size and style) of each record in the table can be modified depending on the value of any selected 'choice' field. For example, Critical cases displayed in red, Serious cases displayed in orange, etc.

Select a 'choice' field whose values will serve as a trigger to set the display attributes of any particular record in the table.

Status

Next Finish Cancel

- The **Colors** tab will then show all options for that field and the formatting options for each
 - Choose font face, size, style
 - Font and background color can also be customized by clicking the box by the drop down menu


- Click **Finish** when complete to save your selection and close the window

- The **Define Notification Icons** option also opens another window to select a specific icon for a field, if desired
 - A new window will open with Field/Icons tabs
 - Select the field to assign an icon and click **Next**
- Click **Select/Manage Images** to bring up the icon window and select desired icon for each field value
 - Upload an image or select a provided icon
 - Click **Select image and exit** when done
- Click **Finish** to save your selection and close the window

Status	No Icon	Alt Text
Submitted for Review	No Icon Select / Manage Images...	Submitted for Review
Terminated	No Icon Select / Manage Images...	Terminated
Cancelled	No Icon Select / Manage Images...	Cancelled
Inactive	No Icon Select / Manage Images...	Inactive
Amended	No Icon Select / Manage Images...	Amended
Active	No Icon Select / Manage Images...	Active
Signed	No Icon Select / Manage Images...	Signed
Approved Pending Signature	No Icon Select / Manage Images...	Approved Pending Signa

Setting the General options

- General view preferences of the view width and display attributes
- On **Records Per Page**, setting a higher number will result in longer loading time



Recommendations:	
Maximum View Width	110 characters
Minimum View Width	None
Minimum Field Width	5
Records per Page	< 30

Apply

- The Personal View is only visible to the creator and cannot be shared or made default view for other teams
- Click **Finish**

Creating a New View

- From the Contracts table, hover the cursor over **Views** underneath the search bar so the drop down menu appears and select **New**
- Follow the same steps of selecting fields and order/colors as when editing the Personal View
- On the **General** tab, name the View
- On the **Apply** tab, select which, if any, teams to which you would like to make the view visible, or make the default view

See sample views and their corresponding settings on the next page!

Sample view settings

1) "Minimalist" Style

Contracts

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

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Search: contains [Go](#)

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

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ID	Record Type	Status	Contracting Party	Contract Title	Contract Start Date	Contract End Date
2112	Contract	Active	Louis Auto Glass	Testing if contract goes through with FM garage	10/17/2018	11/29/2018
1944	Contract	Submitted for Review	CWA, Inc. dba Bellair Charters	Service Agreement	09/01/2018	08/31/2020
1856	Contract	Submitted for Review	Amazon Corporate LLC	test	06/28/2018	10/27/2018
1843	Contract	Draft	Amazon Corporate LLC	Internship	06/27/2018	06/30/2018
1765	Contract	Draft		Test Save as Draft - Portal User		
1744	Contract	Inactive	Cordata Elementary School Parent Teacher...	Test Internships Approved to Form No PRO-271	06/15/2018	06/18/2018
1732	Contract	Pending Approval	Yelm School District	PRO-271A Testing Internship approved to form...	06/12/2018	06/14/2018
1731	Contract	Pending Approval	Whitefish School District	PRO-271A Testing approved to Form Internship...	06/13/2018	06/03/2021
1730	Contract	Inactive	Yelm School District	PRO-271A Internship Workflow approved to Form Yes	06/12/2018	06/15/2018
1614	Amendment Manual	Approved Pending...	Whatcom Stables	Legacy Agreement 16518	06/06/2018	12/31/2018
1612	Contract	Draft	Low Income Housing Institute (LIHI)	Testing new submit button and Outside Email	06/06/2018	06/08/2018
1608	Contract	Pending Approval	La Cima Logistics	La Cima Study Abroad Agreement Education Abroad	08/01/2018	09/07/2018
1299	Amendment Manual	Active	Lynden Tribune & Print Company	Legacy Agreement 2786-1	11/01/2017	11/01/2018

“Minimalist” style view settings:

- **Fields tab:**

- Show selection checkboxes
- Max lines per record: 1
- Max lines per linked field: 1
- Field names displayed & settings:

Field Name	Display	Column Width	Edit	View	Quick Edit	Right Align
Contract End Date	✓	10				
Contract Start Date	✓	10				
Contract Title	✓	50	✓			
Contracting Party	✓	40				
ID	✓	Automatic		✓		
Record Type	✓	20				
Status	✓	20				

- **Order/Colors tab:**

- Drag fields into the following order:
 - ID, Record Type, Status, Contracting Party, Contract Title, Contract Start Date, Contract End Date
- No Row coloring or Notification Icons

- **General tab:**

- Maximum View Width: 110 characters
- Minimum View Width: None
- Minimum Field With: 5 characters
- Records Per Page: 20
- Do not display cell borders

1) "Comprehensive" Style

Contracts

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

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Edit	ID	Record Type	Status	Contracting Party	Contract Title	Contract Description/Scope	Cost Type	Total cost over entire Term of Contract	Contract Start Date	Contract End Date	Contract Department
	2112	Contract	Active	Louis Auto Glass	Testing if contract goes through with FM garage	Testing if Chris can select a department other than her own	Expense	\$4,500.00	10/17/2018	11/29/2018	FM Vehicle Fueling Sys
	1944	Contract	Submitted for Review	CWA, Inc. dba Bellair Charters	Service Agreement	Service Agreement - Consultant	Expense	\$5,000,000.00	09/01/2018	08/31/2020	
	1856	Contract	Submitted for Review	Amazon Corporate LLC	test	Working for the summer	Expense	\$100.00	06/28/2018	10/27/2018	IDEA Institute
	1843	Contract	Draft	Amazon Corporate LLC	Internship	Working for Amazon for the summer	No Cost		06/27/2018	06/30/2018	Economics Department
	1765	Contract	Draft		Test Save as Draft - Portal User		Expense				Office of Field Experiences
	1744	Contract	Inactive	Cordata Elementary School Parent Teacher Association	Test Internships Approved to Form No PRO-271	Contractor t6o test Internship workflow approved to Form No	Expense	\$4,600.00	06/15/2018	06/18/2018	Certification & Admissions
	1732	Contract	Pending Approval	Yelm School District	PRO-271A Testing Internship approved to form Workflow	Submitter CA Dept 1 Unit 1...	Expense	\$0.00	06/12/2018	06/14/2018	Office of Field Experiences
	1731	Contract	Pending Approval	Whitefish School District	PRO-271A Testing approved to Form Internship Workflow -	Submitter CA Dept1/Dept2 No ARisk/AAG	No Cost		06/13/2018	06/03/2021	Office of Field Experiences
	1730	Contract	Inactive	Yelm School District	PRO-271A Internship Workflow approved to Form Yes	Submitter CA Dept 1/2 Unit 1/2...	No Cost		06/12/2018	06/15/2018	Office of Field Experiences

“Comprehensive” style view settings:

• **Fields tab:**

- Show selection checkboxes, show edit icon
- Max lines per record: 4
- Max lines per linked field: 1
- Field names displayed & settings:

Field Name	Display	Column Width	Edit	View	Quick Edit	Right Align
Contract Department	✓	20				
Contract Description/Scope	✓	50				
Contract End Date	✓	10		✓		
Contract Start Date	✓	10		✓		
Contract Title	✓	30	✓			
Contracting Party	✓	25				
Cost Type	✓	16				
ID	✓	Automatic		✓		
Record Type	✓	10				
Status	✓	20				
Total cost over entire Term of Contract	✓	10				

• **Order/Colors tab:**

- Drag fields into the following order:
 - ID, Record Type, Status, Contracting Party, Contract Title, Contract Description/Scope, Cost Type, Total cost over entire Term of Contract, Contract Start Date, Contract End Date, Contract Department
- No Row coloring or Notification Icons

• **General tab:**

- Maximum View Width: 110 characters
- Minimum View Width: None
- Minimum Field With: 5 characters
- Records Per Page: 30
- Do not display cell borders

2) "Visual" Style

Contracts

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

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<input type="checkbox"/>	Edit	Status	ID	Record Type	Contracting Party	Contract Title	Cost Type	Annual Cost	Contract Start Date	Contract End Date	Contract Department	Submitter Name
<input type="checkbox"/>		Active	2112	Contract	Louis Auto Glass	Testing if contract goes through with FM garage	Expense	\$3,500.00	10/17/2018	11/29/2018	FM Vehicle Fueling Sys	Chris Vallejo
<input type="checkbox"/>		Submitted for Review	1944	Contract	CWA, Inc. dba Bellair Charters	Service Agreement	Expense	\$160,000.00	09/01/2018	08/31/2020		Shirley Test2
<input type="checkbox"/>		Submitted for Review	1856	Contract	Amazon Corporate LLC	test	Expense	\$100.00	06/28/2018	10/27/2018	IDEA Institute	Shirley Test2
<input type="checkbox"/>		Draft	1843	Contract	Amazon Corporate LLC	Internship	Revenue		06/27/2018	06/30/2018	Economics Department	Shirley Test2
<input type="checkbox"/>		Draft	1765	Contract		Test Save as Draft - Portal User	Expense				Office of Field Experiences	Shirley Test2
<input type="checkbox"/>		Inactive	1744	Contract	Cordata Elementary School Parent Teacher Association	Test Internships Approved to Form No PRO-271	Expense	\$2,300.00	06/15/2018	06/18/2018	Certification & Admissions	Shirley Test2
<input type="checkbox"/>		Pending Approval	1732	Contract	Yelm School District	PRO-271A Testing Internship approved to form Workflow	Expense	\$0.00	06/12/2018	06/14/2018	Office of Field Experiences	Shirley Test2
<input type="checkbox"/>		Pending Approval	1731	Contract	Whitefish School District	PRO-271A Testing approved to Form Internship Workflow -	No Cost		06/13/2018	06/03/2021	Office of Field Experiences	Shirley Test2
<input type="checkbox"/>		Inactive	1730	Contract	Yelm School District	PRO-271A Internship Workflow approved to Form Yes	No Cost		06/12/2018	06/15/2018	Office of Field Experiences	Shirley Test2
<input type="checkbox"/>		Approved Pending Signature	1614	Amendment Manual	Whatcom Stables	Legacy Agreement 16518	Expense	\$2,500.00	06/06/2018	12/31/2018	Campus Recreation Services	Shirley Test2
<input type="checkbox"/>		Draft	1612	Contract	Low Income Housing Institute (LIHI)	Testing new submit button and Outside Email	Revenue	\$2,222.00	06/06/2018	06/08/2018	Office of Field Experiences	Shirley Test2
<input type="checkbox"/>		Pending Approval	1608	Contract	La Cima Logistics	La Cima Study Abroad Agreement Education Abroad	Expense	\$40,000.00	08/01/2018	09/07/2018	Institute Global Engagement IGE	Shirley Test2








“Visual” style view settings:

• **Fields tab:**

- Show selection checkboxes, show edit icon, show icon column
- Max lines per record: 2
- Max lines per linked field: 1
- Field names displayed & settings:

Field Name	Display	Column Width	Edit	View	Quick Edit	Right Align
Annual Cost	✓	10				
Contract Department	✓	25				
Contract End Date	✓	10				
Contract Start Date	✓	10				
Contract Title	✓	50	✓			
Contracting Party	✓	25				
Cost Type	✓	16				
ID	✓	Automatic		✓		
Record Type	✓	10				
Status	✓	20				
Submitter Name	✓	20				

• **Order/Colors tab:**

- Drag fields into the following order:
 - Status, ID, Record Type, Contracting Party, Contract Title, Cost Type, Annual Cost, Contract Start Date, Contract End Date, Contract Department, Submitter Name
- Set Row Coloring
 - Choice field: **Cost Type**
 - **No Cost:** background color #DEDEDE
 - **Expense and Revenue:** background color #FFFEFF
 - **Revenue:** background color #D7F6DC
 - **Expense:** background color #FFFEFE
- Define Notification Icons
 - Choice field: Status
 - Submitted for Review 
 - Terminated 
 - Cancelled 
 - Inactive 
 - Amended 
 - Active 
 - Signed 

- Approved Pending Signature 
- Pending Approval 
- Draft 
- Submitted for Signature 
- Active Pending Pmt Method Confirmation 
- Internal Review 
- Renegotiating 
- Approved with Redlines 

- **General tab:**

- Maximum View Width: 110 characters
- Minimum View Width: None
- Minimum Field With: 5 characters
- Records Per Page: 30
- Do not display cell borders

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