

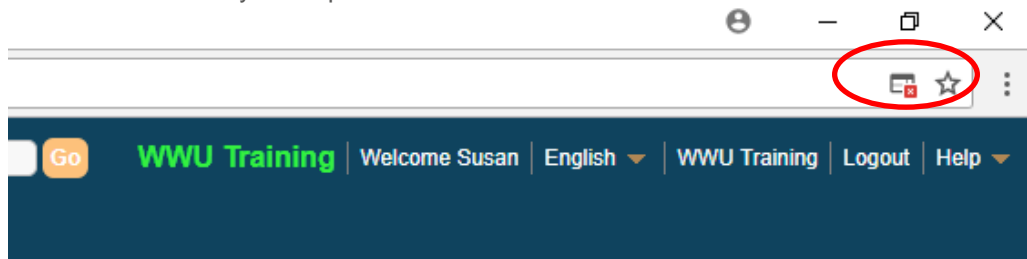


## WESTERN CONTRACT MANAGEMENT MODULE

### Quick Reference: Submitting a Contract Portal User

#### Logging In

- Log on to CMM. In addition to links under [My Available Apps](#) and under the Employee Tab then Technology Tools on [My Western](#) there will be links on the Business Services and [Business and Financial Systems](#) web pages.
- Ensure your Pop-Up Blockers are turned off. At the top right hand side of the CMM Log in page you should be able to click the red “X” and select always allow pop-ups from ESM. For additional information consult your department IT contacts.



- This system works best with Chrome. Explorer and Safari also work, Chrome is preferred.

#### Contract User Portal Screen

The entry screen you see when logging in has been customized for your specific access role.

#### Description of Dashboard Tiles

- **My Profile** – Here you can manage your contact information, username and password, and indicate a delegate for contracts to be forwarded to when you are out of the office. You can also set a return date for the delegation to be automatically turned off.
- **My Contracts**- Here you can access all Contracts that you have submitted to see status.
- **WWU Contracts** – Here you can access all WWU contracts that have been designated as Public.
- **Request/Submit a Contract** – This screen is used to submit a new contract request, it requires entry of basic information about the contract and allows either the use of a template or the ability to upload a contract document. Once Submitted, the contract is routed to Contract Administration or your unit Contract Manager for further processing.
- **Vendor Scorecards** – This provides an opportunity to give a Contractor a quick rating on how they have performed on a specific contract for Western.
- **My Approvals** – This tile will appear if your role includes approval routing.

Tip: - Use Save as Draft often!

Save as Draft

The screenshot shows the ESM Contract User Portal. At the top left is the 'esm solutions' logo. On the top right, it says 'User: loisl@wwu.edu | Logout'. Below the logo is a navigation bar with buttons 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 contains six 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). On the right side, there is a search bar with a 'Go' button and radio buttons for 'WWU Contracts' and 'My Contracts'.

### Steps to complete a Contract

- The steps to complete a contract submission are:
- Complete all required fields (identified by a red asterisk\*) on Tabs 1, 2, 3. You may select a Tab by clicking the Tab.
  - Step 1 is Tab 1 – Complete all the required contract Details
  - Step 2 is Tab 2 – Complete Compliance information
  - Step 3 is Tab 3 – Either load documents (“New button”) or Create a Document from Template or hit Submit.
  - *If you need to load or generate documents wait to hit the Submit Button after all documents are generated or uploaded.*

The screenshot shows a portion of the contract submission form. It has two main sections: 'Contract Type and Template Information' and 'Contract Documents'. In the first section, there are dropdown menus for 'Contract Type' and 'Document Template Title'. A green button labeled 'Create Document from Template' is circled in red. In the second section, there is a heading 'Once uploads are complete be sure and select the Submit Button' followed by a green 'Submit' button. Below this, there is a 'Documents:' section with instructions: 'Select New to upload vendor contracts, attachments, exhibits, riders that are part of the contract or documents required to be submitted with the contract.' A 'Status:' line shows 'No records.' At the bottom, a blue button labeled 'New' with a plus icon is circled in red.

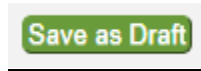
Last Step is Submit

## Save Functionality

Please note there are two Save Functions within a contract record.

“Save as Draft” and “Save.” The “Save” button is available **at both the top and bottom** of the contract record.

**Tip: - Use Save as Draft often!**



- Save as Draft will save your work without completing all required fields in draft form. It will not close the record you are completing.
- The “Save” button appears at the top of the record and the bottom of the record. The system will not let you save a record without completing all required fields. If you hit “Save” before hitting Submit, the Contract Record closes and you have to go to “My Contracts” and bring the record back up in order to complete submission.
- The “Save” button has a drop down option – Save & Continue and Save & New. Both buttons will close the record you have up on the screen.

## Request/Submit a Contract

- From the dashboard select the Request/Submit a Contract Tile. This will automatically bring you to the Contract Details Tab.

### Static Record “Header”

- Each Contract Record has a static header that stays the same regardless of what tab you are in.

A screenshot of the contract record static header form. It shows a navigation bar at the top with "Save" and "Cancel" buttons, and tabs for "1. Contract Details", "2. Compliance", "3. Documents", "4. Approvals", "5. Emails", and "6. Related Contracts". Below the navigation bar is a "Collaps All" link and a "Save as Draft" button. The form contains various fields: ID (1671), Record Type (Contract), Contract Visibility (Private), WWU or Contractor's Form? (radio buttons for Western Document and Contractor Document), Contract Unit (Financial and Business Services), Contract Unit Code (5300), Contract Department, Contract Owner/Financial Manager, Contract Owner/Financial Manager ID, Contract Owner/Financial Manager Email, and Contract Owner/Financial Manager Direct Phone. A "Clone Contract" button is located at the bottom left of the form.

## Completing Tab 1- Contract Details

### 1. Contract Details 2. Compliance 3. Documents 4. Approvals 5. Emails 6. Related Contracts

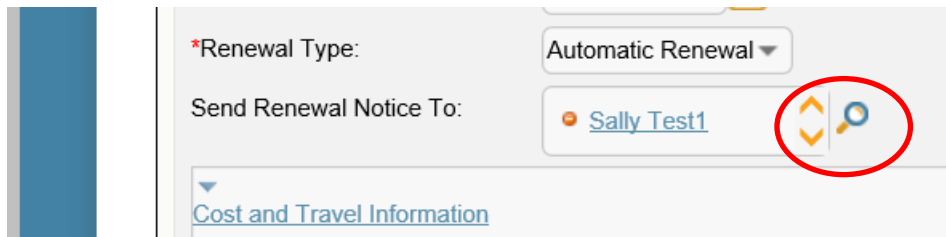
- Remember - You have to complete Tabs 1 through 3 and complete all required fields (identified by a red asterisk) in order to submit a contract. **Use Save as Draft** often.
- **ID** – Self populates from system. **This is your Contract number.**
- **Record Type**
  - Contract – select contract if main this is a new contract.
  - Amendment – Choose manual amendment if this is an amendment to a contract which is active in the system.
- **Contract Visibility** - This will default to Private. Select Public unless the contract contains protected information that is deemed confidential. Contracts marked Public are visible by all CMM users. Contracts marked Private are only visible by Submitter, Approvers and Contract Administration. Please note very few contracts are private. If you wish your contract to remain private explain your reasoning in the Field labeled “Additional Contract Information or Instructions” at the bottom of the record.
- **WWU or Contractors Form** – if the contract will be created by WWU then select WWU, if contract generated by the Contractor select Contractors form. You will upload the document on Tab 3.
- **Contract Unit** – this will be populated based on your submitter profile or you may choose from the drop down list.
- **Contract Department** – please select appropriate department from drop down list.
- **Contract Owner/Financial Manager** – please select from drop down list, this person will be responsible for making decisions pertaining to the contract such as renewals and terminations.
- If the Department or Contract Owner is not available, enter the correct department and contract owner in the “**Additional Contract Information or Instructions**” area at the bottom of the screen.
- **Contract Title** – Please provide a title for the agreement, this will likely populate into the template you use.
- **Contract Description/Scope** – Please provide a description of the service. In describing scope, include the deliverables and responsibilities. Please note this box can be expanded by dragging the right bottom corner of the box to increase size. You can cut and paste into the box. You can also attach scope as a work document if needed. You will enter costs in another area.

In the automated templates this information will be entered into your contract document, usually under Description of Performance/Service.

- **Contracting Party Information** – start typing your Contractor's name. If the contractor is already in our system the name information will populate all fields except for Contracting Main Contact and their email which has been left purposely blank. If the Contractor is not already in the system please fill out all required fields in this section.
- **Contract Dates** – Please enter the Start Date and End Date for the Contract. Many contracts start for

a period of time before the actual service date. For example, travel may take place a few days before a specific event date. If applicable, provide the single specific date of service and location of service (i.e. a classroom number, city, county, or building).

- **Renewal Type** – If the Contract has renewal language or renewals available **select Manual renewal**. If there are no renewals available, select None. Your Contract Administrator will review and select “Automatic” renewal if that is appropriate.
- **Send Renewal Notice to:** Renewal notices are sent to the Contract Owner and the Submitter. You can choose to add additional people to receive renewal notification emails. Look up additional names by selecting the hourglass.



- **Cost and Travel Information.** First Select Cost type from the drop down menu. Choices are, Expense, Revenue, Expense and Revenue and None. Each of these choices will affect the next boxes that appear:
  - Expense – complete payment structure, then complete annual cost if you contract is for multiple years put the annual cost in this field and total cost over the entire term in the Total cost field. Please note if your contract is under one year your annual cost and total cost will have the same amount. Then Select your method of payment.
  - Revenue – select your revenue type from the drop down menu, then enter the estimated revenue amount.
  - Expense and Revenue – complete all fields for Expense and Revenue described above.
  - No Cost – no further info needed.
- **Cost for Travel /Accommodation/Meals** – If no travel selected no further info needed. If travel included provide detail about what is being covered and not to exceed amount and any other narrative.
- **Additional Information** – if any other notes or instructions to Contract Administration are needed include your notes here.

## Completing Tab 2 – Compliance

\*Compliance Review:

<input type="checkbox"/> Personal Health Information (e.g. HIPAA)	<input type="checkbox"/> Student Educational Records (e.g. FERPA)	<input type="checkbox"/> Personal Financial Information (e.g. credit cards) Cash Handling
<input type="checkbox"/> Hazardous Materials	<input type="checkbox"/> Children/Minors on and off campus	<input type="checkbox"/> Serving Alcohol
<input type="checkbox"/> Special Event Stakeholder Review	<input type="checkbox"/> Conflict of Interest review or Disclosure	<input type="checkbox"/> Use of a Non-State Facility Space
<input type="checkbox"/> Potential Prevailing Wage requirements	<input type="checkbox"/> Work will not violate WWU union agreements	<input type="checkbox"/> Use of Human Participants or Subjects
<input type="checkbox"/> Intellectual Property	<input type="checkbox"/> Copyright or Patents	<input type="checkbox"/> Use of University Logos and Trademarks by Contractor
<input type="checkbox"/> Purchase of a Controlled or Prohibited Item	<input type="checkbox"/> Non-Disclosure or Confidentiality requirement	<input type="checkbox"/> Potential permanent utilization of WWU space
<input type="checkbox"/> None		

Select any of the fields above that apply to your contract, providing any narrative in the box under the check boxes. Any questions you should refer to the hyperlink and consult the appropriate University contact.

## Completing Tab 3- Documents

A campus User has three options

1. Generate a contract from a Template
2. Attach an agreement or document
3. Submit the Contract Record and have Contract Administration generate the agreement.

### Option 1: Generating a Contract from a Template:

- Contract Type – select a contract type from the drop down list
- Document Template Type – then select a document template from the drop down list
- Once these two fields are populated Click on Create Document from Template Button

Create Document from Template

Your Word Document that was generated from the template will show up below underneath the “New button in the Contract Documents area.

Contract Type and Template Information

Contract Type: IT Related - Not Software  
Document Template Title: Services Long Form


Create Document from Template

Contract Documents

Documents:


Status: 1 record(s) found, 1 page(s). Click [here](#) to recount records.

New

Edit	ID	Document Type	Document Name	Attached File	Date Created
	1673	Generated Document Template	Testing Workflow IT related not software from AS/VU	<a href="#">1670 - Testing Workflow IT related not software from AS_VU.docx</a>	

- If you wish to edit the document /redline click on edit and check out.
- If you wish to just view document click View File.

#### How to redline a document

- Select edit and checkout then open word and enable editing. The document will automatically have redlines enabled. If you click show markup you can track your redlines. **Please note you will not be able to stop the redlining function** – only Contract Admin can do that.
- Once you are ready to save your document click on the save symbol in the top left corner 
- Once saved you can close document and any changes will be automatically saved to the document in the record.

### Option 2: If you are Attaching a Document:

The system works best with Word documents. If a vendor submits a PDF ask them to send you a version if word. Regardless of the format you will need to upload a document.

- Click on New Button to attach files from a drive or drag and drop files from your desktop.
- Complete the Document type from the drop down list
- Name your document

- Attach the document

The screenshot shows a 'New' document creation interface. At the top left is a 'New' button with a plus icon. Below it is a 'Document' header. The form contains the following fields and controls:

- Buttons: Save, Cancel
- Document Contract Info
- Collapsible All
- ID: 605
- Contract Title: [Search icon]
- Document Type: [Dropdown menu]
- Document Name: [Text input field]
- Attached File: [Attach/Manage] [Drag&Drop files]
- Include in Approval Packet: Yes [Dropdown menu]
- Notes: [Text area]
- Buttons: Save, Cancel

Congratulations! Now you are ready to submit your contract to Contract Administration.

### Option 3: If you wish Contract Administration to Generate the Document:

After completing all fields in the contract record a campus user may submit the contract record by clicking the Green Submit button. Contract Administration will then generate the document based upon the information provided.

**Submit**

Once you **hit submit** your contract request has been submitted for review and you can **NO Longer Make Changes** unless Contract Administration returns it to a Draft Status.

If there are any required fields missing you will be prompted to complete the missing fields. Once any missing fields are completed it is a good practice to "Save" and then "Submit."

The screenshot shows the top portion of a 'Contract' form. It includes a 'Contract' header with a sun icon, 'Save' and 'Cancel' buttons, and a 'Collapse All' link.

### Before hitting "Submit" or emailing Your Draft

If you wish to Email your draft document to internal or external parties you will need to do this before hitting "Submit."

You will go to the Email Tab. Scroll down below the static header field and complete the send Email area.

Send Email

Internal Contacts to Email  External Contact to Email

Manually Entered Email Address

Email Subject

Email Body

Files to Email  1804 Test Contract Training.docx

Send Email

▼ Emails

Be sure and select which files you wish to email or no attachments will be included in your message.

Hit Send.

Emails sent and received are available under the Email tab – click the Email ID# (2256) to read. If your contact wishes to redline the document they will need to edit, save and upload a new version to the reply email.

▼ Emails

Status: 1 record(s) found, 1 page(s). Click [here](#) to recount records.

<input type="checkbox"/>	ID ↓	To	Subject	Created On
<input type="checkbox"/>	2256	susan.banton@wwu.edu	<a href="#">Test Contract Training</a>	06/26/2018 08:42

Once you receive notice that an email reply has been received you may read the email under the email tab.

▼ Emails

Status: 2 record(s) found, 1 page(s). Click [here](#) to recount records.

<input type="checkbox"/>	ID ↓	To	Subject	Created On
<input type="checkbox"/>	2257	Contract Management Bot Test <cmmbottest@wwu.edu>	<a href="#">RE: Test Contract Training</a>	06/26/2018 08:49
<input type="checkbox"/>	2256	susan.banton@wwu.edu	<a href="#">Test Contract Training</a>	06/26/2018 08:42

You will click the email ID#. And be able to read the message within the system. Any attachment will be available by the “Attachments” field. Should you wish to keep this attachment as the latest version you will need to upload it under the documents tab. You will need to open the amended document, save it on your computer, go to the documents tab and upload the new version.



✉ Email

[Edit](#) [Close](#)

[Email](#) [Marketing](#) [Background Details](#)

[«](#) [»](#)

ID	2257	Type	Email		
From	Susan Banton <Susan.Banton@wwu.edu>	From Login	bantons@wwu.edu	From Company	company_to
To	Contract Management Bot Test <cmmbottest@wwu.edu>	To Logins			
Email CC					
Email BCC					
Created On	06/26/2018 08:49				
Attachments	<a href="#">1804 - Test Contract Training(V2SB).docx</a>				
Subject	RE: Test Contract Training				
Content	Please see the attached changes				

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**From:** Contract Management Bot Test  
**Sent:** Tuesday, June 26, 2018 8:42 AM  
**To:** Susan Banton <Susan.Banton@wwu.edu>  
**Subject:** Test Contract Training ID:[3m94gu/2256/1804]

Under the Documents Tab, click New, choose a Document type (**tip, Contract, Redline Drafts works well**), name your document and hit Save. Now both versions of the agreement are available under the documents tab. You may open the amended version and continue your redlines.

Status: Document #696 successfully created. 2 record(s) found, 1 page(s). Click [here](#) to recount records.

[New](#) | 
 [Mass Edit](#) | 
 [Delete](#)

<input type="checkbox"/>	Edit	ID ↓	Document Type	Document Name	Attached File	Date Created
<input type="checkbox"/>		696	Contract - Redline/Drafts	1804 Test Contract Training (V2SB) (1)	<a href="#">1804 - Test Contract Training(V2SB) (1).docx</a>	06/26/2018 08:56
<input type="checkbox"/>		685	Generated Document Template	Test Contract Training	<a href="#">1804 - Test Contract Training.docx</a>	06/20/2018 09:26

Once you document is ready to go be sure and **hit the Green "Submit"** button. This will submit your agreement to Contract Administration to finish the routing and approval process.