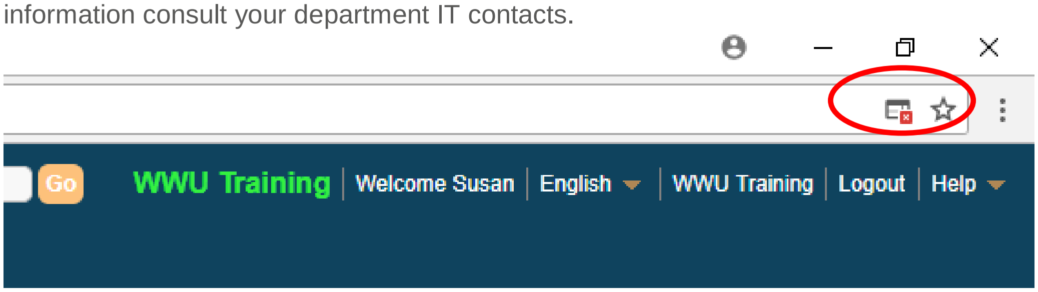
WESTERN CONTRACT MANAGEMENT MODULE

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

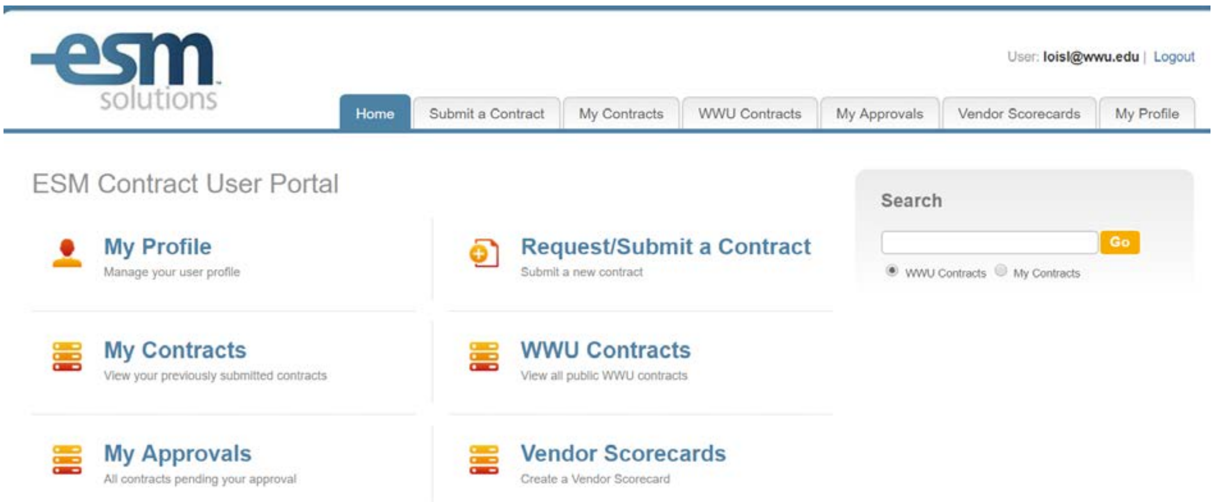
The entry screen you see when logging in has been customized for your specific access role.

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!

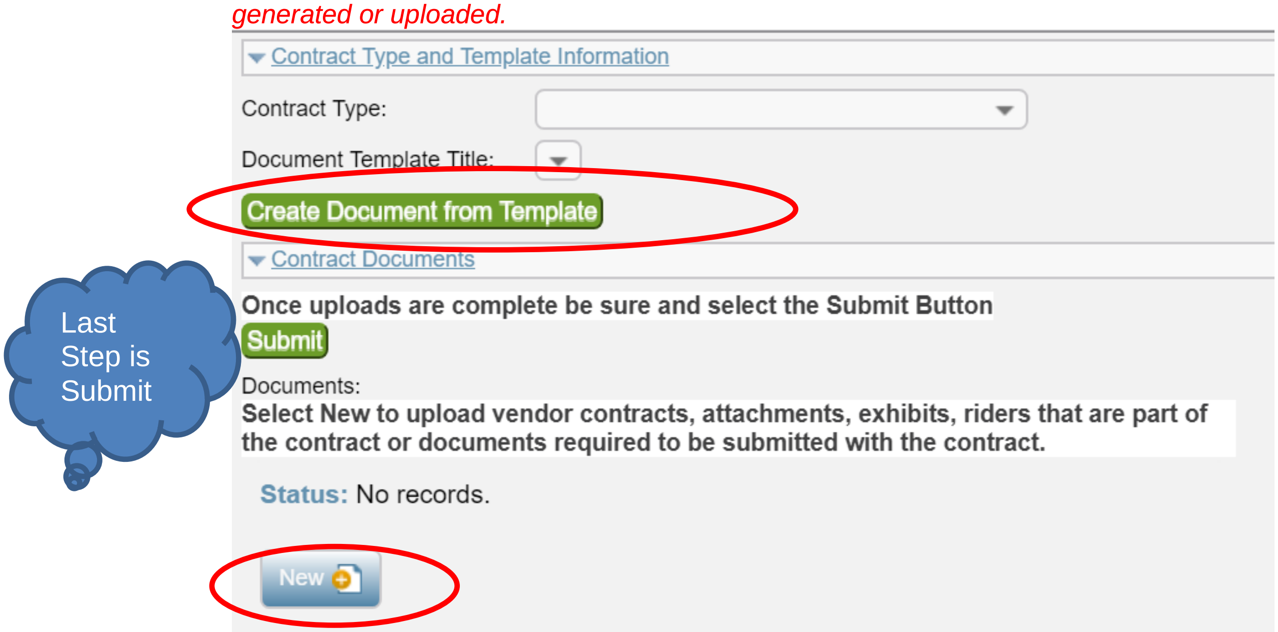


Steps to complete a Contract

- 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.*



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!

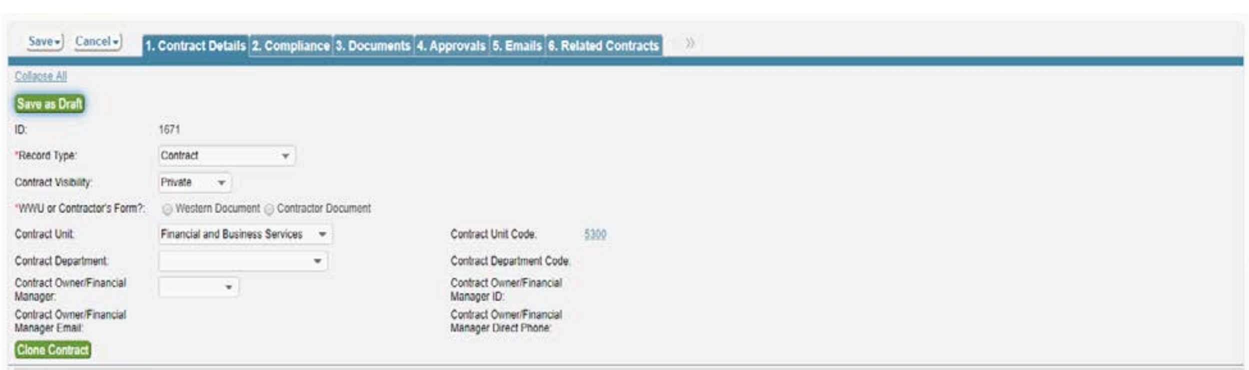
- Save as Draft will save your work without completing all required fields in draft form. It will not close the record you are completing.
- The "Save" button appears at the top of the record and the bottom of the record. The system will not let you save a record without completing all required fields. 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

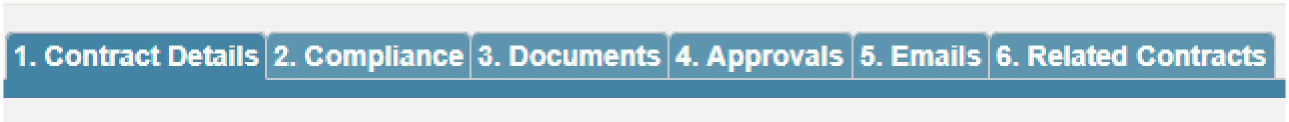
- From the dashboard select the Request/Submit a Contract Tile. This will automatically bring you to the Contract Details Tab.

Static Record "Header"

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



Completing Tab 1- Contract Details



- 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 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.

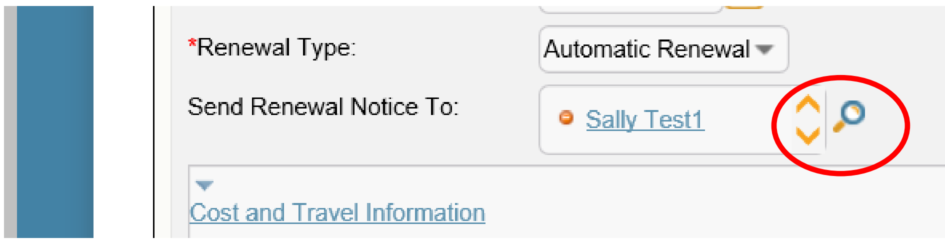
  In the automated templates this information will be entered into your contract document, usually under Description of Performance/Service.

- **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.

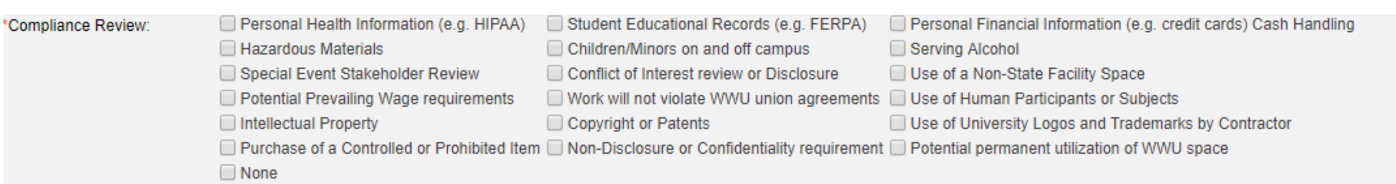


- **Cost and Travel Information**. First Select Cost type from the drop down menu. Choices are, Expense, Revenue, Expense and Revenue and None. Each of these choices will affect the next boxes that appear:
    - Expense – complete payment structure, then complete annual cost if you contract is for multiple 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



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.

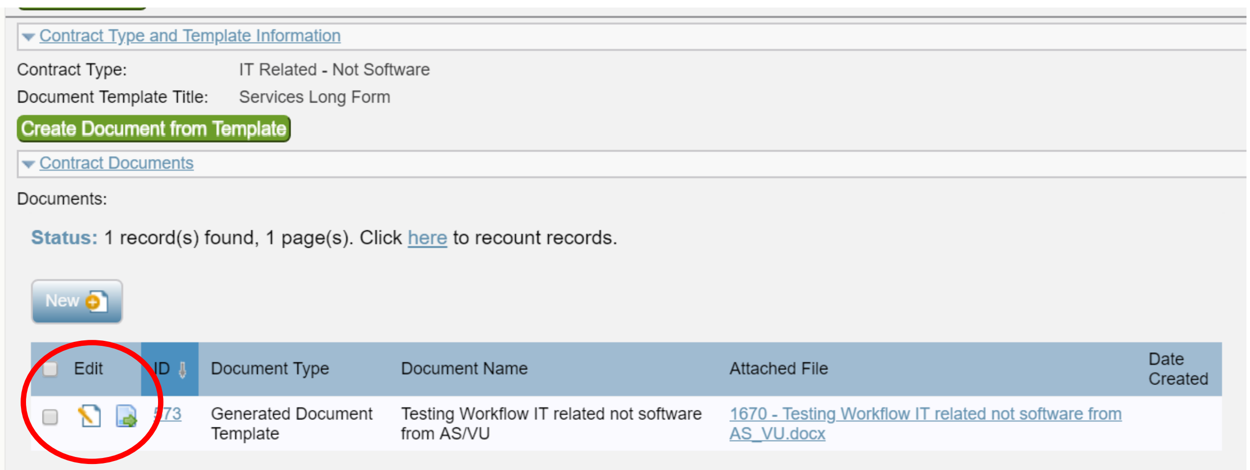
Completing Tab 3- Documents

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

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



- 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

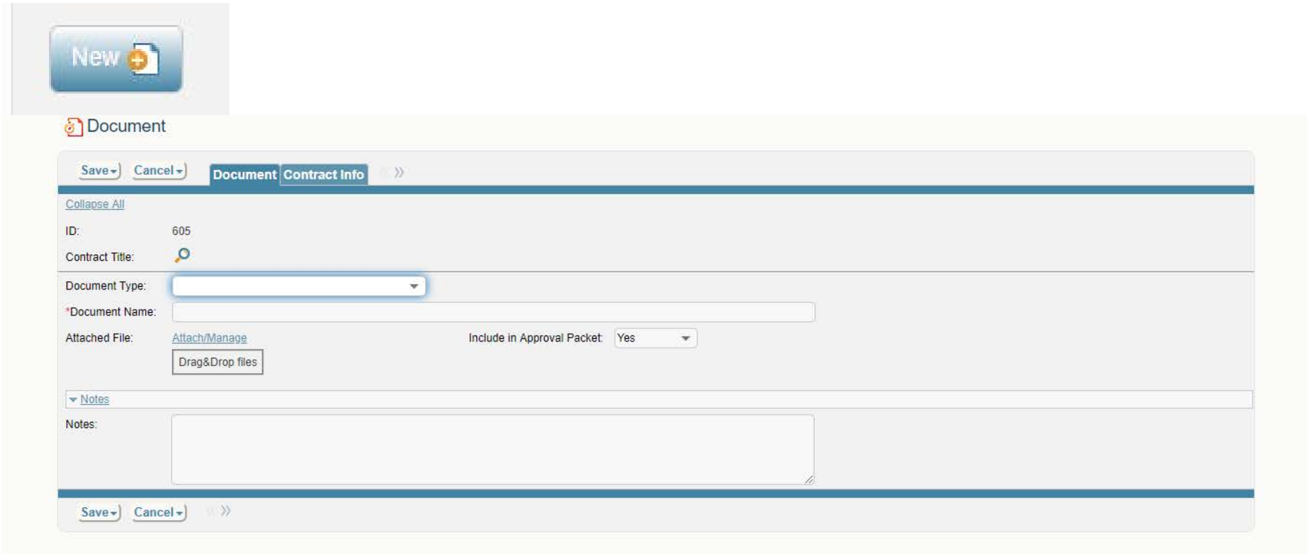
- Select edit and checkout then open word and enable editing. The document will automatically have redlines enabled. If you click show markup you can track your redlines. **Please note you will not be able to stop the redlining functio**n – only Contract Admin can do that.
- Once you are ready to save 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



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.

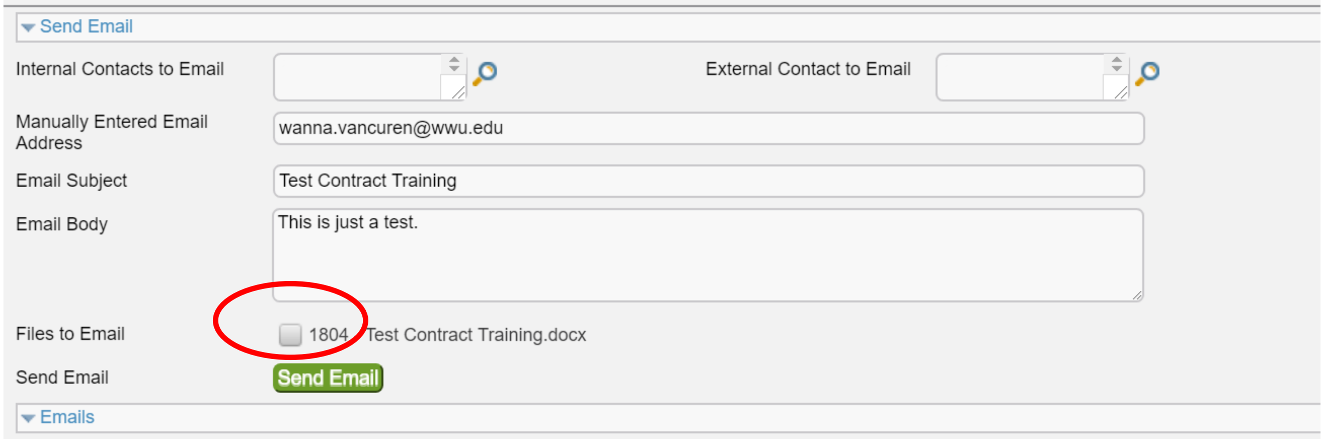
Once you **hit submi**t your contract request has been submitted for review and you can **NO Longer Make Changes** unless Contract Administration returns it to a Draft Status.

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.”

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.”

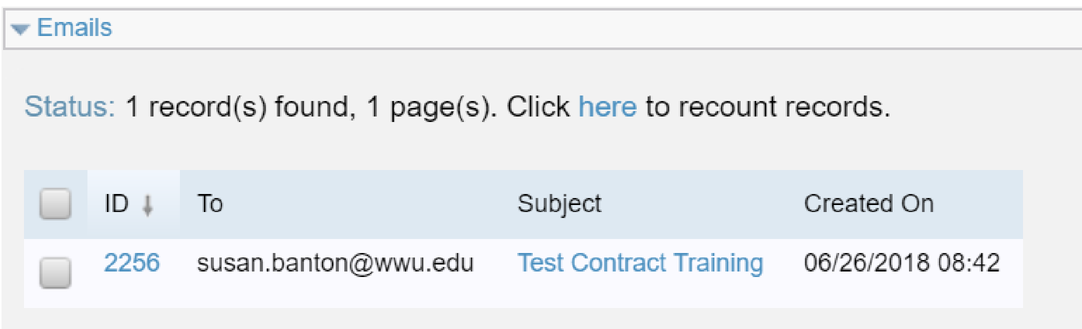
You will go to the Email Tab. Scroll down below the static header field and complete the send Email area.



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.

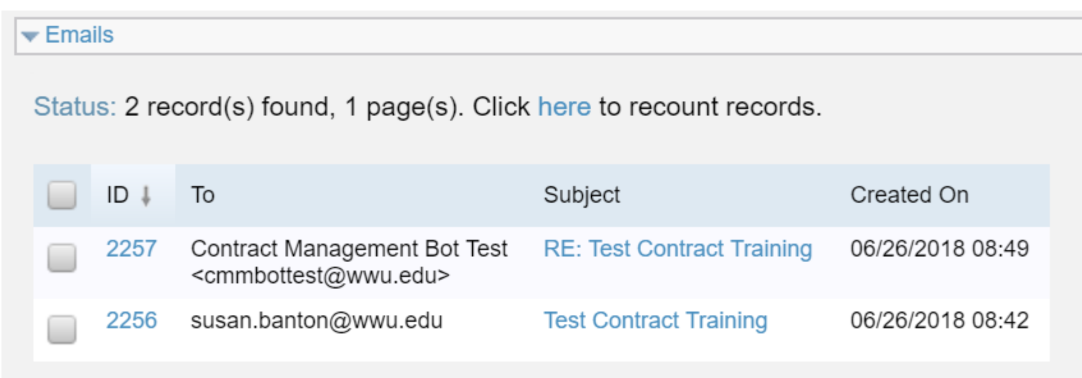


Emails

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

	ID	To	Subject	Created On
	2256	susan.banton@wwu.edu	Test Contract Training	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.

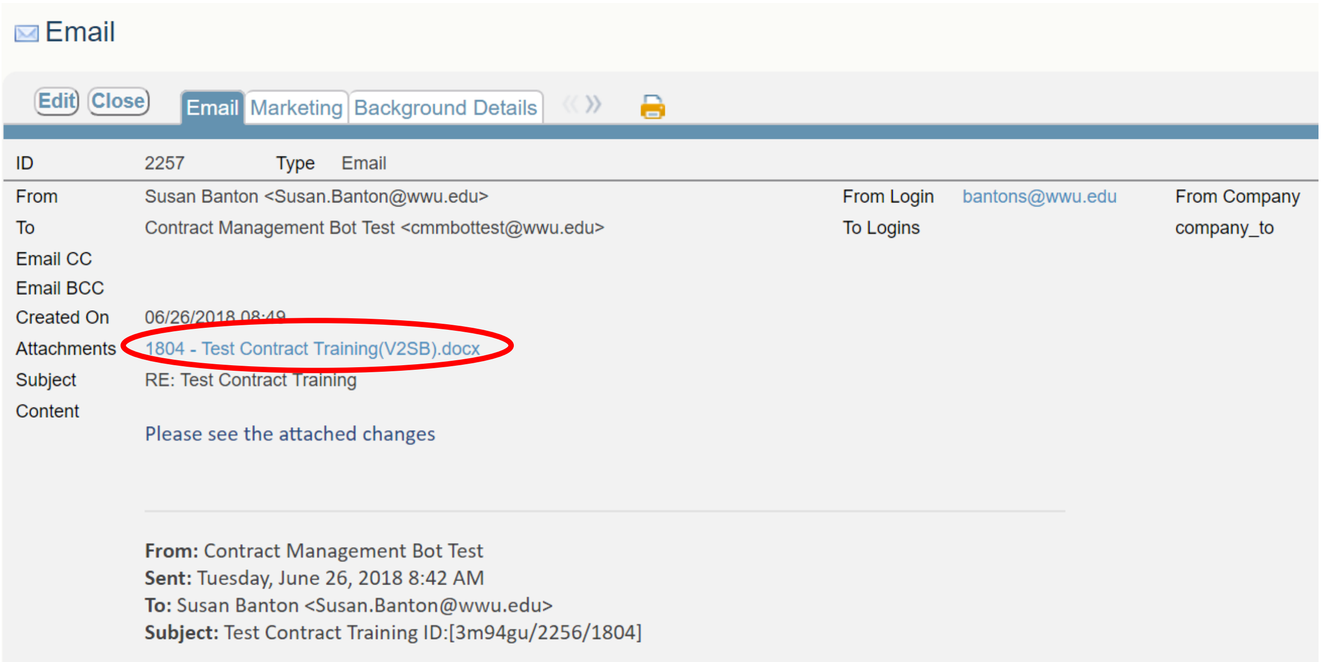


Emails

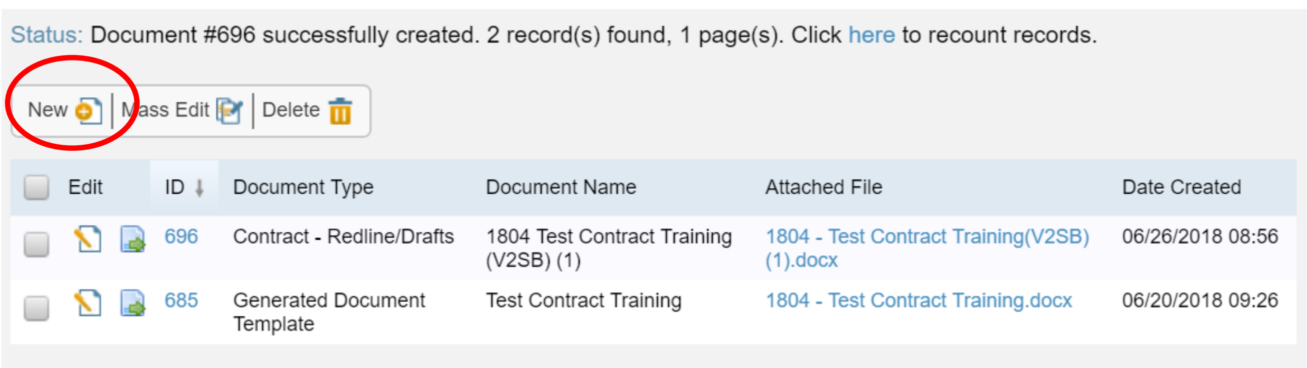
Status: 2 record(s) found, 1 page(s). Click here to recount records.

	ID	To	Subject	Created On
	2257	Contract Management Bot Test <cmmbottest@wwu.edu>	RE: Test Contract Training	06/26/2018 08:49
	2256	susan.banton@wwu.edu	Test Contract Training	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.



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

	Edit	ID	Document Type	Document Name	Attached File	Date Created
		696	Contract - Redline/Drafts	1804 Test Contract Training (V2SB) (1)	1804 - Test Contract Training(V2SB) (1).docx	06/26/2018 08:56
		685	Generated Document Template	Test Contract Training	1804 - Test Contract Training.docx	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.