eCLAWS Gatekeeper Introduction:

eCLAWs is a simple contract and agreement workflow system that asks questions to help contract submitters provide the right information needed by the Gatekeeper, Reviewer(s), and Signatories in order to process contracts as quickly as possible.

NOTE: A TEST version of eCLAWS has been created for users to review/train/practice. To access the TEST environment, log into eCLAWs-TEST with your My Northeastern credentials. The Production environment should only be used for actual contract and agreement submissions.

The eCLAWs application follows the existing Gatekeeper business process, whereby the school/business unit Gatekeeper is responsible for the business review of contracts. There is a primary Gatekeeper, and one or two alternates assigned at ORG, DIV, and/or EXEC levels of the Banner Hierarchy.

As a Gatekeeper, your dashboard provides the list of items associated with you in your role as Gatekeeper; keeping the eCLAWs dashboard open on your desktop is the easiest way to see the work in your pool/queue.

Gatekeeper, Reviewer, and Signatory are roles in the eCLAWS workflow; for each of these roles, contracts are sent to the associated pool; no contract is automatically assigned to a person with that role (e.g. the Primary Gatekeeper). The business process governs that the Primary Gatekeeper should monitor the work sent to the pool, and assign appropriate records to themselves.

As Gatekeeper, you will only see work in your pool if you have been assigned the Gatekeeper role, and are affiliated with the department of the NU Contact specified in the eCLAWs record.

Colored dots in the dashboard at the "Submitted to Stop" column are used to visually indicate how long the record has been at a the stop in the workflow

		eCLAWS ID ⇕	NU Contact ⇕	Other Party ⇕	Purpose ⇕	Type ⇕	Status	Owner ⇕	Submitted to Stop
🔥	☑	20-C-00057	Kelly Sylvia Basner	ⓘ UES : Universal Energy Systems	Research & Innovation	Test DUA	Under Review - Pending Institutional Review	Unassigned	● 08/27/2019
👁	☑	20-C-00051	Timur External QA Lead	ⓘ ADE : Active Data Exchange	Purchase of Goods & Services (Procurement)	Gallery 360	Under Review - Pending Institutional Review	timur djuraev	● 08/20/2019
	☑	20-C-00031	Marlon Sanchez	ⓘ LL : MIT Lincoln Laboratory	Purchase of Goods & Services (Procurement)	Lease: Equip	Under Review - Pending Institutional Review	Unassigned	● 08/05/2019
	☑	20-C-00030	Marlon Sanchez	ⓘ MIT : Massachusetts Institute of Technology	Purchase of Goods & Services (Procurement)	Hotel	Under Review - Pending Institutional Review	Unassigned	● 08/05/2019
🔥 👁	☑	19-C-00212	Dana Carroll	ⓘ EPAM	Research & Innovation	NDA - 2way	Under Review - Pending Institutional Review	Dana Carroll	● 06/24/2019
	☑	19-C-00189	Joan M. Cyr	ⓘ Colonnade Hotel	Purchase of Goods & Services (Procurement)	Hotel	Under Review - Pending Institutional Review	Joan M. Cyr	● 06/13/2019

At the Gatekeeper stop, the dots change at shorter intervals than they do at Reviewer or Signatory stops. This table indicates the intervals at which the dot colors change:

	Blue dot	Yellow dot	Red dot
Gatekeeper	1-7 days at stop	8-14 days at stop	15+ days at stop
Reviewers & Signatories	1-14 days at stop	15-30 days at stop	31+ days at stop

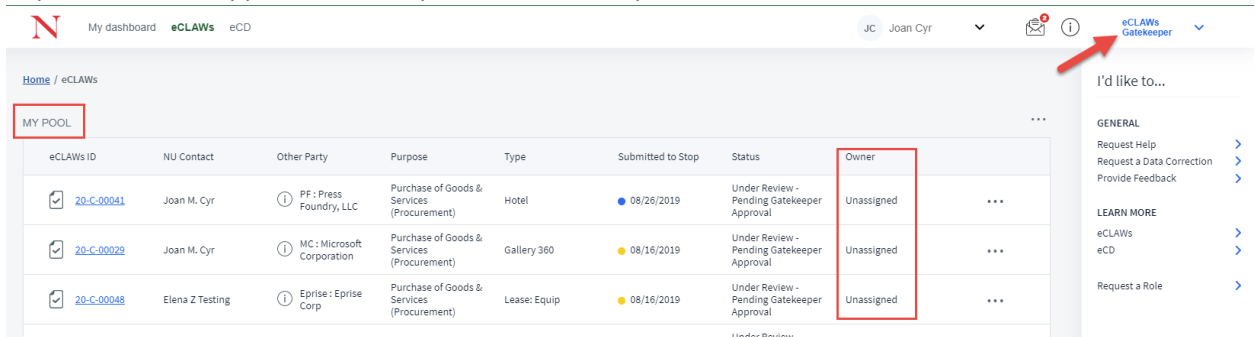## Gatekeeper Review process in eCLAWs (Production)

1. Log into eCLAWS with your My Northeastern credentials:

Welcome

Login as NU User

ePAWs, eCLAWs, eCD
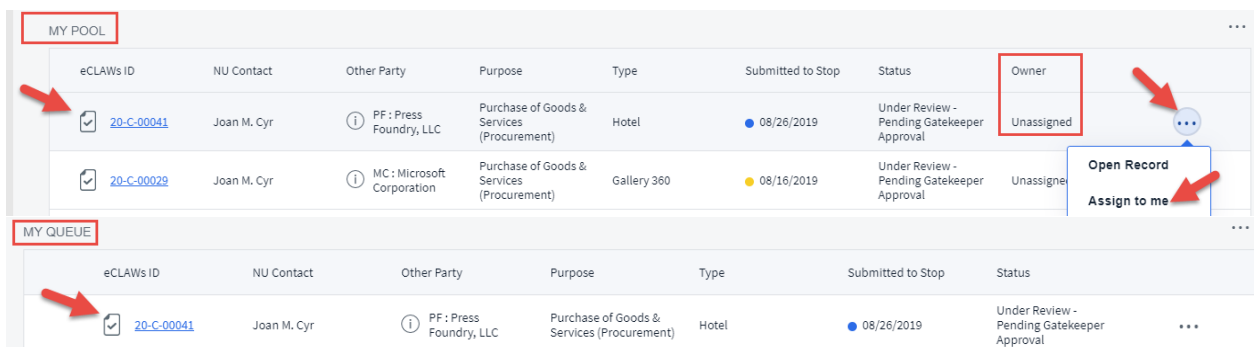
Sign In or *Sign Up* as External User
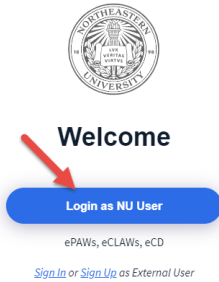
2. Upon login, confirm the eCLAWS Gatekeeper role in the upper right corner of the screen is shown; To manually select the role, pull the 'dropdown' eCLAWs Gatekeeper ⌄ and select:

N   My dashboard   **eCLAWs**   eCD   JC   Joan Cyr   ⌄   ✉² ⓘ   eCLAWs Gatekeeper ⌄

3. The eCLAWs application is built on Role + ORG access; If you have the Gatekeeper Role, and have been assigned Gatekeeper affiliation with specific departments, contracts associated with those departments will appear in the "My Pool" section of your eCLAWs dashboard:

eCLAWs ID	NU Contact	Other Party	Purpose	Type	Submitted to Stop	Status	Owner
20-C-00041	Joan M. Cyr	PF : Press Foundry, LLC	Purchase of Goods & Services (Procurement)	Hotel	● 08/26/2019	Under Review - Pending Gatekeeper Approval	Unassigned
20-C-00029	Joan M. Cyr	MC : Microsoft Corporation	Purchase of Goods & Services (Procurement)	Gallery 360	● 08/16/2019	Under Review - Pending Gatekeeper Approval	Unassigned
20-C-00048	Elena Z Testing	Eprise : Eprise Corp	Purchase of Goods & Services (Procurement)	Lease: Equip	● 08/16/2019	Under Review - Pending Gatekeeper Approval	Unassigned

I'd like to…

GENERAL
Request Help
Request a Data Correction
Provide Feedback

LEARN MORE
eCLAWs
eCD

Request a Role

4. All submitted eCLAWs contracts are sent to the Gatekeeper Pool; any Gatekeeper who is assigned Gatekeeper responsibility for specific schools/units, and who has been assigned the Gatekeeper role in eCLAWs, can select a contract to process. Once you select a contract to process, the contract moves from your "Pool" to your "Queue." To select a contract to process, select the 3 action dots on the right side of the contract's dashboard entry, and choose "Assign to me:"

MY POOL

eCLAWs ID	NU Contact	Other Party	Purpose	Type	Submitted to Stop	Status	Owner
20-C-00041	Joan M. Cyr	PF : Press Foundry, LLC	Purchase of Goods & Services (Procurement)	Hotel	● 08/26/2019	Under Review - Pending Gatekeeper Approval	Unassigned
20-C-00029	Joan M. Cyr	MC : Microsoft Corporation	Purchase of Goods & Services (Procurement)	Gallery 360	● 08/16/2019	Under Review - Pending Gatekeeper Approval	Unassigned

Open Record

Assign to me

MY QUEUE

eCLAWs ID	NU Contact	Other Party	Purpose	Type	Submitted to Stop	Status
20-C-00041	Joan M. Cyr	PF : Press Foundry, LLC	Purchase of Goods & Services (Procurement)	Hotel	● 08/26/2019	Under Review - Pending Gatekeeper Approval

The contract moves from "My Pool" unassigned, to "My Queue" and is assigned to you.

Alternatively, you can open the record from "My Pool," and "Assign to Me" from inside the record:
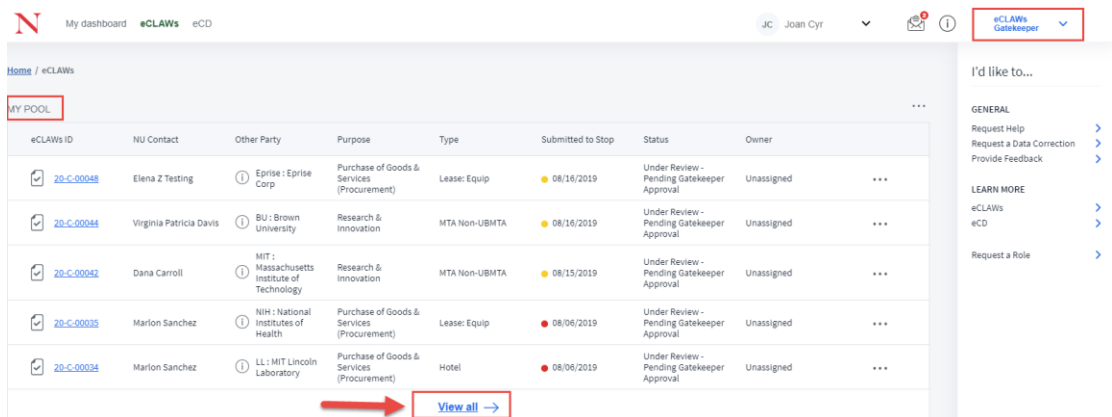
a. Alternate Gatekeepers can also see work sent to the pool, but the business process dictates that he/she doesn't initially act on it…the Primary Gatekeeper does.

b. Monitoring the colored dots can assist in determining a delay in processing due to the Primary Gatekeeper availability/workload.

c. By selecting "View All" in the "My Pool" widget, and searching for all records with Review Status of "Pending Gatekeeper Approval," Alternate Gatekeepers can monitor the work in workflow:

d. The Alternate Gatekeeper can reassign a record to themselves (or return to the pool) by selecting the 3 action dots aligned with the record, and selecting "Assign to Me" (or "Return to Pool"):

☑	20-C-00010	Timur Utanov	ⓘ TNY : Toyobo New York, Incorporated	Purchase of Goods & Services (Procurement)	MSA	Under Review - Pending Gatekeeper Approval	Timur Utanov	● 07/11/2019 •••
☑	20-C-00009	Timur Utanov	ⓘ TNY : Toyobo New York, Incorporated	Purchase of Goods & Services (Procurement)	MSA	Under Review - Pending Gatekeeper Approval	Unassigned	● 07/11/2
☑	19-C-00186	Joan M. Cyr	ⓘ Wednesdaywoes, Inc.	Purchase of Goods & Services (Procurement)	Lease: Equip	Under Review - Pending Gatekeeper Approval	Unassigned	● 06/12/2

Open Record
Assign to me
Return to Pool

5. Once the record is assigned to the Gatekeeper, he/she must review the contract details by selecting "Review/Correct Contract Data:"

Contract / Agreement Data	**Contract/Agreement Data** •••
Route Log	*As the Gatekeeper please confirm that contract information is correct, please specify the additional requirements, if any. If all looks good, please certify & submit the contract to the institutional reviewer.*
File Cabinet	
Related Records	General Information
Informational Requests	Submitter Joan M. Cyr 🔺 **Review/Correct Contract Data** NU Contact Joan M. Cyr
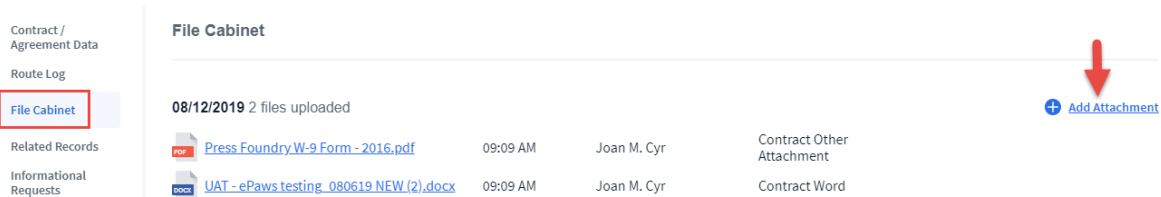
a. Reviewing the contract details equates to reviewing the paper "Contract Submission Checklist."
   i. *For details on the Contract Data input by the Submitter, see the "Submit a Contract or Agreement for Review" instructions on the [eCLAWs website](#).*
b. The Gatekeeper must review each section of the contract data in order to submit the contract to the next stop in the workflow; select "Reviewed/Next" button at the bottom of each page, then "Reviewed/Finish" on the last page:

Back   Save   **Reviewed / Next**   Back   Save   **Reviewed / Finish**

c. The Gatekeeper can make any changes, but according to the school/business units business process, the Gatekeeper may instead choose to return the contract to the Submitter for correction.

Return Contract/Agreement   ✕

Returning to Stop

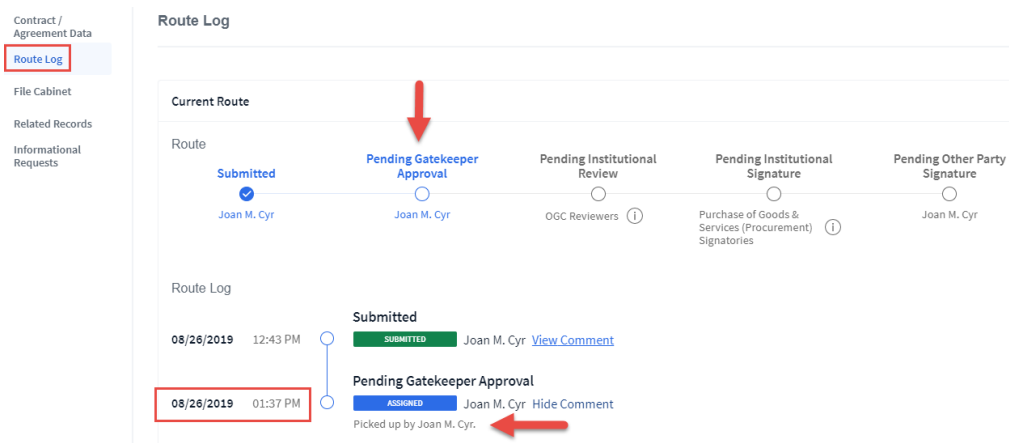Submitted   ⌄   *Select the stop to return the contract*

Comment *(optional)*

Please enter your comment

Close   **Return**

6. Review the "Route Log" to see where the contract has been, the current stop, and future stops in the workflow:

   a. Review the "File Cabinet" to find all attachments associated with the record; *The Gatekeeper can add attachments to the File Cabinet by selecting "Add Attachment."*

7. Review any related eCLAWs or ePAWs records on the "Related Records" tab:
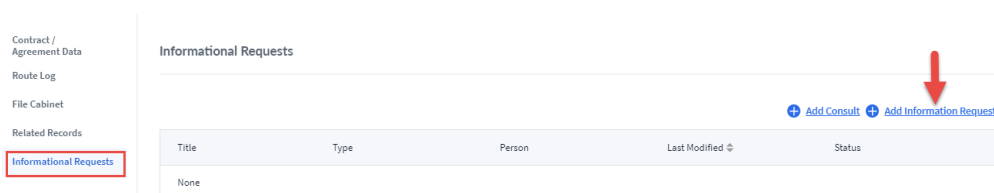
8. If the Gatekeeper had a question about the contract, he/she can ask it in an "Information Request" (to an individual) or in a "Consult" (particular institutional groups configured for questions directed to a group, e.g. Risk Services, Environmental Health/Safety, etc.). This is a 'chat' feature within the record so correspondence about the contract remains part of the record. The two functions work the same, the only difference being the addressees. To add an "Information Request:"

   a. Select "Add Information Request" on the right of the "Informational Requests" tab:

b. With Type "Information Request" selected, type the name of the person from whom you are seeking information, and select their name from the resultant search result (this search is linked to Northeastern's LDAP); then select "Add"
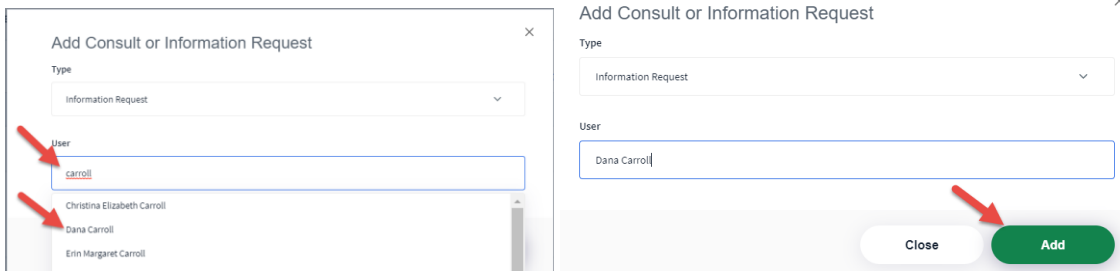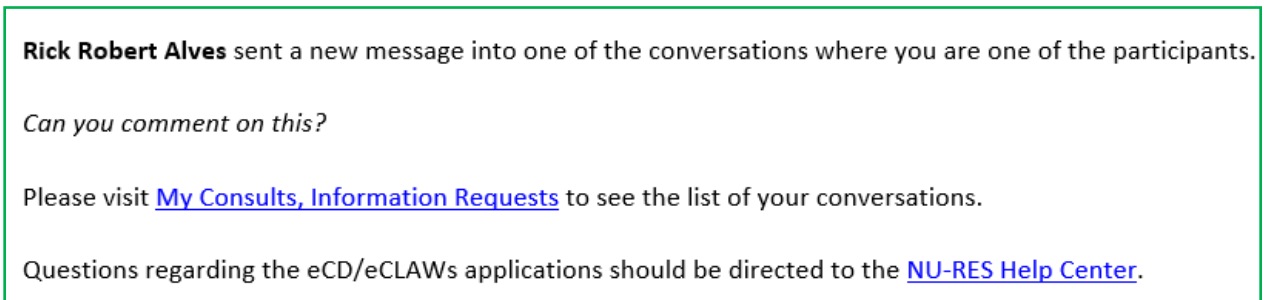

9. Type your message in the space, *including the contract number*, add new attachments, link an existing attachment from the File Cabinet, then select the "paper airplane" to send the chat to the recipient:
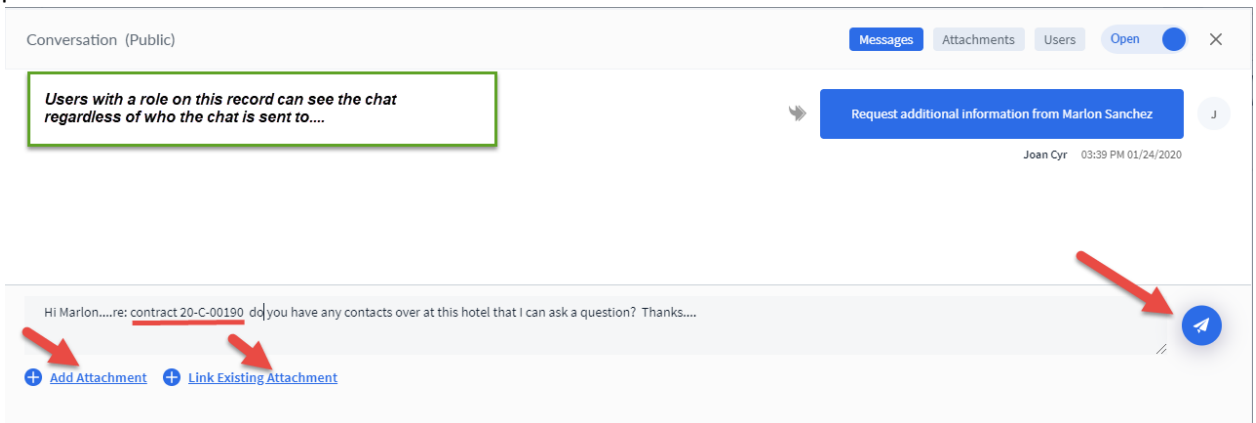
a.

b. The recipient will receive an email alerting them to the request for information:

Rick Robert Alves sent a new message into one of the conversations where you are one of the participants.

Can you comment on this?

Please visit My Consults, Information Requests to see the list of your conversations.

Questions regarding the eCD/eCLAWs applications should be directed to the NU-RES Help Center.

c. *Notes about Informational Request and Consult chats:*
   i. *All users with a role on the record can see the chat…the chat is not private between the members of the chat*
   ii. *For Informational Requests, Chat members who do not have a role on the record can only see the chat and any attachments in the chat (they cannot see the entire record); Consult group members can see the entire record, as they have a pre-assigned role as members of the Consult Group*
   iii. *Additional users can be added to a chat by selecting "Users" in the upper right corner of the chat box, then and "+Add User"*

10. When your Gatekeeper business review is complete, select the "Certify and Submit" button on the "Contract / Agreement Data" tab:

11. Select the "Route Log" tab to see the record has moved to the next stop in the workflow:

12. If the contract is changed after NU signs, and a second review is requested, the record will enter the workflow again; if the contract is re-routed to the Gatekeeper, and the changes are business related only, and inconsequential, you can return the record to the Submitter by selecting "Return as Fine" from the "Contract/Agreement Data" page:

For help with the eCLAWS application, please contact the NU-RES Help Center.

For Procurement business process related questions, contact Procurement@northeastern.edu.

For Research business process related questions, contact NU-RES@northeastern.edu.