

## eCLAWS "Submit a Contract or Agreement for Review" Step-by-Step Instructions for Purchase of Goods and Services (Procurement)

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

To submit a contract or agreement for review, have a copy of your contract (in electronic format), any supporting documents (Statements of Work, W9's, Certificates of Insurance, etc.) ready to upload to the system.

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

## Submitter Dashboard

On the My Agreements and Contracts-**In process** dashboard, contracts are listed with the most recent "Last Modified" date at the top. The Status column shows the workflow stop where the contract is currently in process.

The colored dots in the dashboard in the Status column are used to visually indicate how long the record has been at a certain stop in the workflow. 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 dot colors change:

			Blue dot 1-7 days at stop 1-14 days at stop		Yellow dot 8-14 days at stop 15-30 days at stop		Red dot 15+ days at stop 31+ days at stop	
	Gatekeeper Reviewers & Signatories							
eCLAWS ID		NU Contact	Other Party	Purpose	Туре	Submitted to Stop	Status	Owner
2	19-C-00141	Elena Z Testing	Route w/o GK as a stop	Research & Innovation	MPSA	• 06/06/2019	Under Review - Pending Institutional Review	Unassigned
9	19-C-00119	Elena Z Testing	BMC test : Boston Medical Center test	Provision of Goods & Services by Northeastern	License: Facilities	05/31/2019	Under Review - Pending Institutional Review	Unassigned
9	19-C-00032	Elena Z Testing	NAS : National Association of Scholars	Purchase of Goods & Services (Procurement)	License: Facilities	<b>o</b> 04/25/2019	Under Review - Pending Institutional Review	Unassigned



## Submit a Contract or Agreement for Review (Production)

1. Log into the PRODUCTION <u>eCLAWS</u> environment with your My Northeastern credentials:



2. Upon login, confirm the eCLAWS Submitter role in the upper right corner of the screen is shown; To manually select the role, pull the 'dropdown' eCLAWS Submitter and select:



3. To submit a contract or agreement for review, select from the "I'd like to" menu – "Submit a Contract or Agreement for review:"

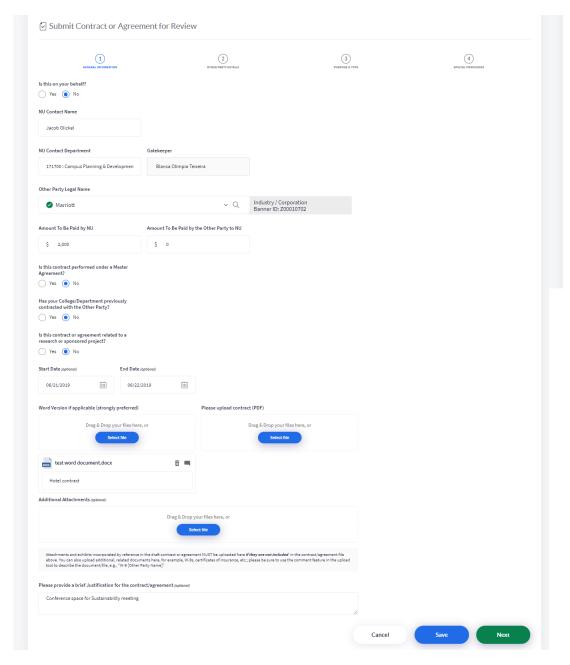


Note: You can submit a contract on your own behalf, or on the behalf of another person/department. Depending on the NU Contact, purpose, and type of the contract, eCLAWS will present different questions, approval routes, Gatekeepers, reviewers, and signatories.

The following example is a contract for the purpose of "Purchase of Goods and Services," and is a Hotel Contract that follows the typical OGC Gatekeeper Process.



4. Provide the relevant information by answering the "General Information" questions, then select "Next:"

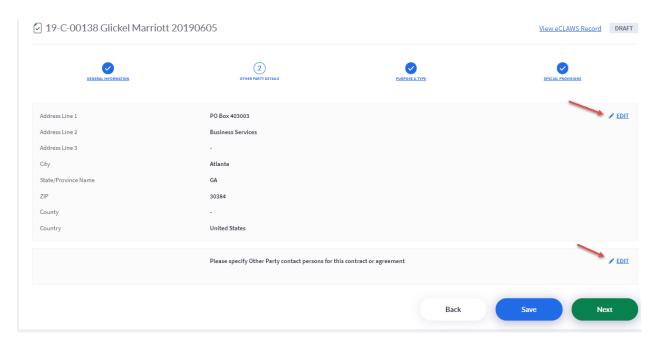


Note: If the external organization is not in the database, manually insert the name of the other party in the field, and provide address details on the next page.

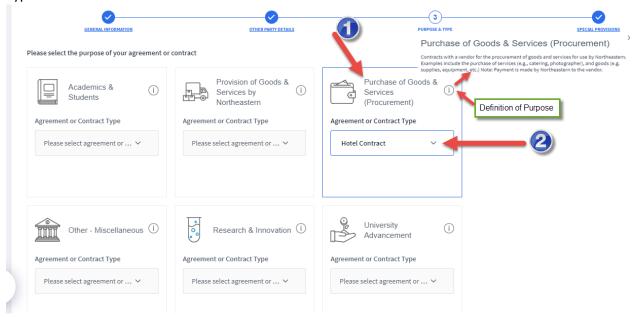


5. On the "Other Party Details" page, review the other party's address; the default address from the database, if known, is displayed; to change the address, or include Other Party contact information, select the "EDIT" buttons, and change/provide the information; then, select "Next."

NOTE: This action changes the address in this record only; it does not change the default address in the eCLAWS application.

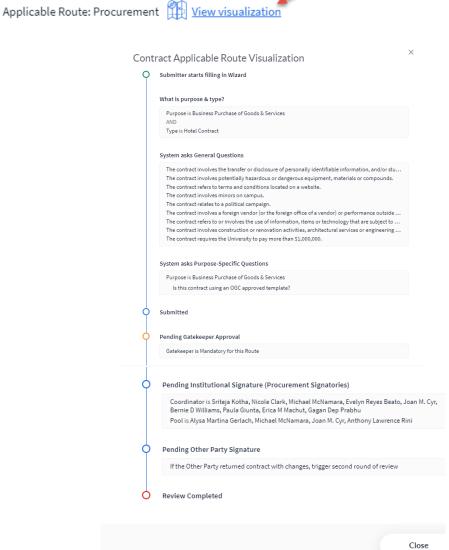


6. On the "Purpose & Type" page, first select the purpose of the agreement "Purchase of Goods & Services (Procurement)" by selecting the name (to see a definition of the Purpose, select the "I" in the appropriate tile); then within the tile, pull the dropdown and select the Agreement or Contract Type:

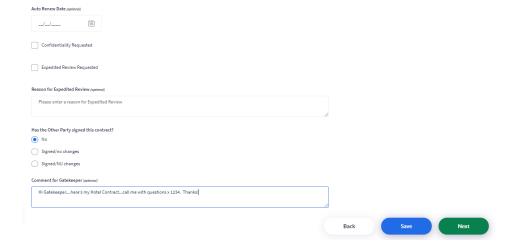




7. Once the Purpose and Type are selected, you can preview the workflow associated with the record:

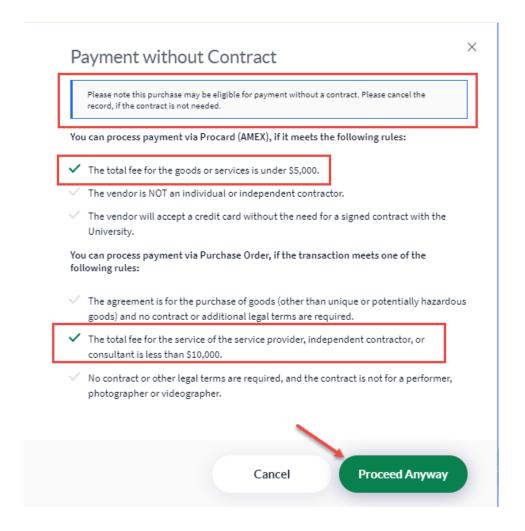


8. Answer the remaining questions/provide information, then select "Next:"



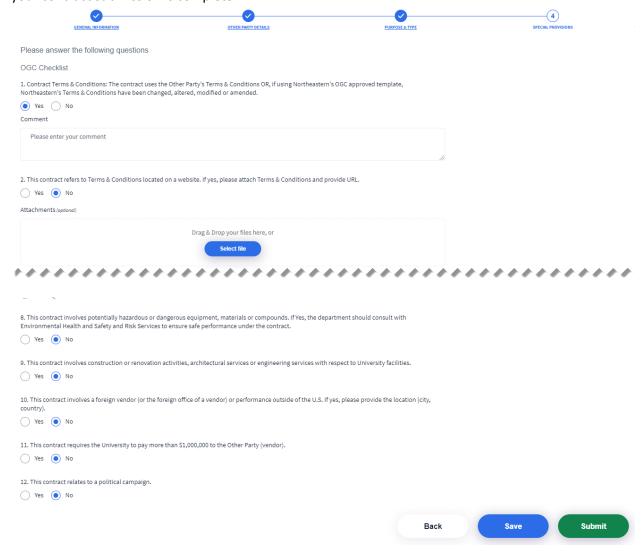


- 9. The system follows the Gatekeeper process, so depending on the information you input to the record, if your purchase is less than \$5000, you may be prompted with a reminder that you could process your purchase with an AMEX card; if your purchase is less than \$10,000, you could process your payment through use of a Purchase Order.
  - a. If you choose, or if the "Other Party" requires a contract be executed regardless of the NU Procurement rules, you can "Proceed Anyway."

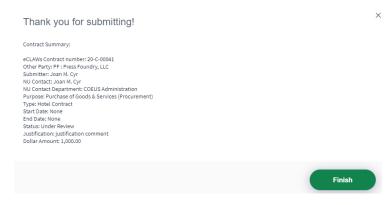




10. On the "Special Provisions" page, answer the remaining questions; when done, select "Submit" and your contract submission is complete:

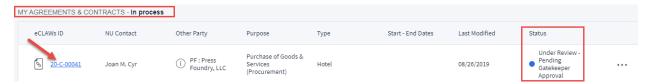


A confirmation pop-up showing a summary of your contract submission appears – select "Finish" to close the window:

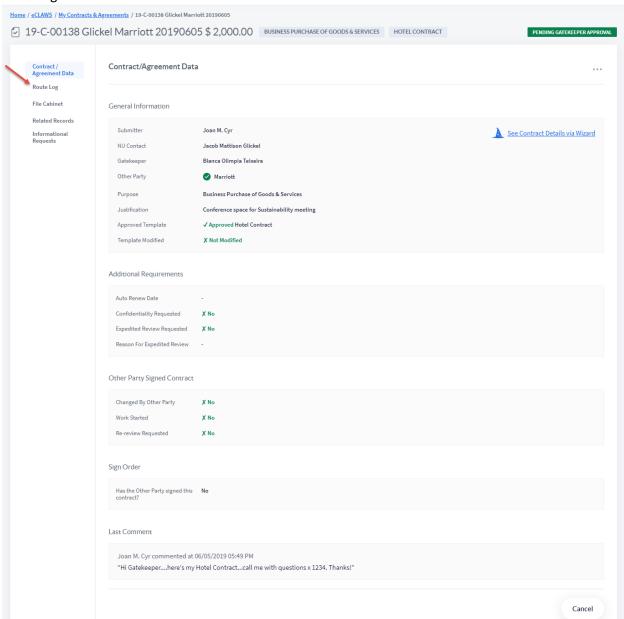




11. To see your contract in the workflow, go to the eCLAWS Home dashboard N My dashboard eclaws eclaws and the "My Agreements & Contracts – In Process" section; select the record ID to view the summary:

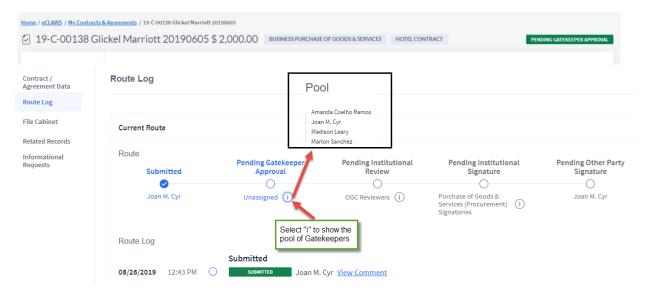


a. The "Contract/Agreement Data" summary screen is shown; select the "Route Log" from the left navigation to see the record in workflow:





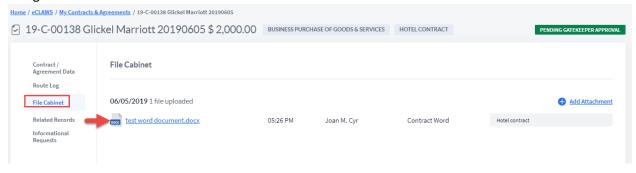
- b. The "Route Log" is where you can see where your agreement or contract is in the workflow; where it has been, where it is presently, and where it is going. It includes dates and times the record was acted upon, or when it moved along the workflow. At the top horizontally, the workflow is shown at a high level; Vertically, the workflow is shown in detail.
- c. To see list of those who have a role and can process the record at the different stops, select the "I" next to "unassigned." Once a user in the workflow assigns the record to him/herself, their name will appear in the horizontal and vertical workflow:



12. If you have made an error in your contract submission, you can recall it by selecting the "action dots" located in the upper right corner of the Contract/Agreement Data summary screen:



13. To see all of the attachments associated with the record, select "File Cabinet" from the left navigation:





14. To see related eCLAWS or ePAWS records, select "Related Records" from the left navigation:



15. If the Gatekeeper, Reviewer, or Signatory had a question about the record, they can send an Information Request or Consult to relevant parties; those conversations are recorded in the "Informational Requests" tab in the left navigation:



- a. 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 preassigned 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"

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.