



REVIEWING & APPROVING A CONTRACT IN CMM

There are **2 main ways you can review and approve contracts** in the CMM System:

- via Email link
- via CMM “My Approvals” tile

There are also a few options you can choose when reviewing the contract:

- **Approve**
 - Use this when everything is in order and you have no outlying questions
- **Approve with Advisory Notes**
 - Use this when you have concerns or questions regarding a certain part of the contract (e.g. “please note that we must give 30 days notice to terminate so please increase the renewal reminder by 3 weeks”)
- **Reject**
 - Use this when major changes need to happen, you already know of similar software/etc. we are currently using at the University, or if a re-work needs to happen with the any part of the contract

Reviewing & Approving via Email

Please note, the system emails come from CMMSystemEmail@wwu.edu and all links within are safe to click.

Approval within the Email

This option is best if you are already familiar with the contract details or are unable to log into the CMM.

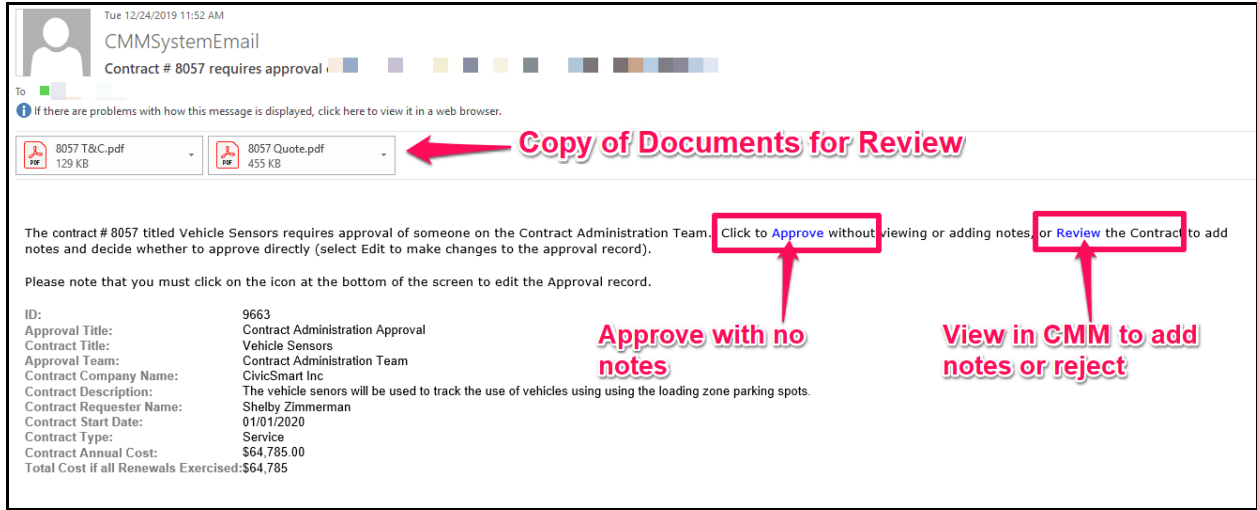
1. Key contract details are summarized in the body of the CMM generated email.
2. Attached are the documents for review (contract and any additional details, e.g. Terms & Conditions or email messages).
3. If this is enough information for your approval, you can approve the contract by clicking the [blue “approve” link](#).
4. Once you have clicked the link and approved, the workflow will move onto the next approver.

Review and Approve within the Email

This option is best if you would like to approve with Advisory Notes or reject from the email.

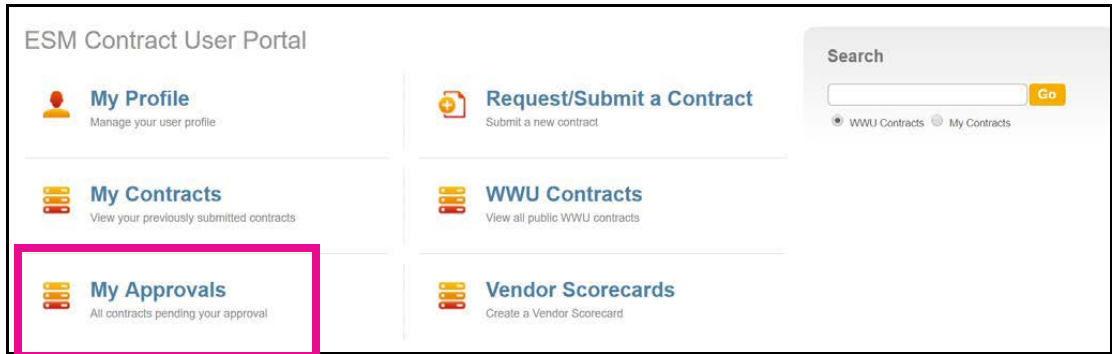
1. Click on the [blue “Review” link](#) to open the record in the CMM.
2. From here you can add in Advisory notes.
3. Change the Approval Status/Approval Action to Approved/Approved with Advisory Notes/Rejected.
4. Once you save, the workflow will move onto the next approver.

Email Example:

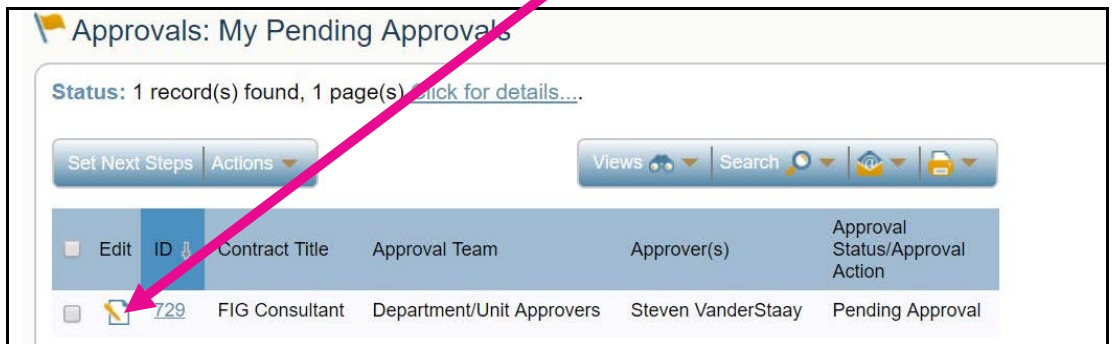


Reviewing & Approving via the CMM System

To approve directly in the CMM, log in and click on the “My Approvals” tab.



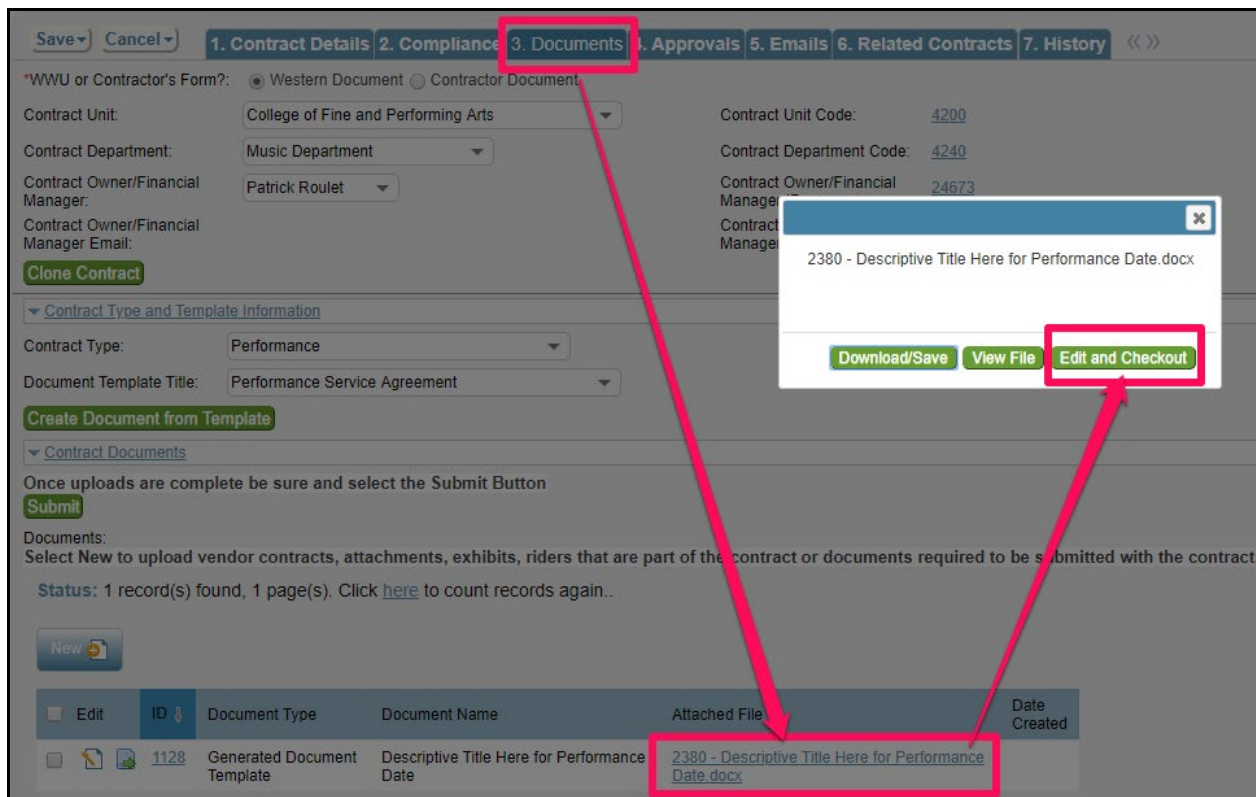
Your Pending Approvals will appear. Click on the “Edit” icon to the left of the Contract you are going to review.



NOTE: If you click on the “ID” link it will send you to a summary screen, where you cannot make any changes.

Need to make changes to the document before you “Approve with Advisory Notes”?

Once you have clicked into the “Edit” icon, view the contact document (Tab 3), click on the document, and when the pop-up appears choose “Edit and Checkout”.



The screenshot shows a web application interface for contract management. At the top, there are tabs: 1. Contract Details, 2. Compliance, 3. Documents (highlighted with a red box), 4. Approvals, 5. Emails, 6. Related Contracts, and 7. History. Below the tabs, there are fields for contract details such as Contract Unit (College of Fine and Performing Arts), Contract Department (Music Department), and Contract Owner/Financial Manager (Patrick Roulet). A 'Clone Contract' button is visible. Below this, there are sections for 'Contract Type and Template Information' and 'Contract Documents'. A 'Submit' button is present. At the bottom, there is a table of documents. The table has columns for 'Edit', 'ID', 'Document Type', 'Document Name', 'Attached File', and 'Date Created'. One document is listed with ID 1128, Document Type 'Generated Document Template', and Document Name 'Descriptive Title Here for Performance Date'. The 'Attached File' column shows '2380 - Descriptive Title Here for Performance Date.docx' (highlighted with a red box). A red arrow points from the 'Edit' icon in the table to a pop-up window. The pop-up window has a title bar with a close button and contains the text '2380 - Descriptive Title Here for Performance Date.docx'. Below the text are three buttons: 'Download/Save', 'View File', and 'Edit and Checkout' (highlighted with a red box).

A few question pop-ups will appear. Click yes/approve/etc. to all (it is just confirming that you want to open a document and yes, it is encrypted and trusted).

Once you have the document open, make any changes you would like and **hit SAVE** before closing the document.

Your document will now be “redlined” (i.e. showing track changes in red to the Contract Admin team).

Make any Advisory Notes in the Approvals tab (including the fact you made edits to the text) and switch the dropdown to “Approved with Advisory Notes”.

Then **save** and it will move the workflow onto the next approver.