eCLAWS “Submit a Contract or Agreement for Review” Step-by-Step Instructions

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: 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.

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:

<table>
<thead>
<tr>
<th>Status Column</th>
<th>Blue dot</th>
<th>Yellow dot</th>
<th>Red dot</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gatekeeper</td>
<td>1-7 days at stop</td>
<td>8-14 days at stop</td>
<td>15+ days at stop</td>
</tr>
<tr>
<td>Reviewers &amp; Signatories</td>
<td>1-14 days at stop</td>
<td>15-30 days at stop</td>
<td>31+ days at stop</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>eCLAWS ID</th>
<th>NU Contact</th>
<th>Other Party</th>
<th>Purpose</th>
<th>Type</th>
<th>Submitted to Stop</th>
<th>Status</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>19-C-00141</td>
<td>Elena Z. Testing</td>
<td>Route w/o GK as a stop</td>
<td>Research &amp; Innovation</td>
<td>MPSA</td>
<td>06/08/2019</td>
<td>Under Review - Pending Institutional Review</td>
<td>Unassigned</td>
</tr>
</tbody>
</table>
Submit a Contract or Agreement for Review (Production)

1. Log into the PRODUCTION eCLAWS 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’ 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:

**Applicable Route:** Procurement

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:

Please answer the following questions

OGC Checklist

1. Contract Terms & Conditions: The contract uses the Other Party's Terms & Conditions OR, if using Northeastern's OGC approved template, Northeastern's Terms & Conditions have been changed, altered, modified or amended.
   - [ ] Yes
   - [ ] No
   Comment
   Please enter your comment

2. This contract refers to Terms & Conditions located on a website. If yes, please attach Terms & Conditions and provide URL.
   - [ ] Yes
   - [ ] No
   Attachments (optional):

Drag & Drop your files here, or

Select File

8. This contract involves potentially hazardous or dangerous equipment, materials or compounds. If yes, the department should consult with Environmental Health and Safety and Risk Services to ensure safe performance under the contract.
   - [ ] Yes
   - [ ] No

9. This contract involves construction or renovation activities, architectural services, or engineering services with respect to University facilities.
   - [ ] Yes
   - [ ] No

10. This contract involves a foreign vendor (or the foreign office of a vendor) or performance outside of the U.S. If yes, please provide the location (City, country).
   - [ ] Yes
   - [ ] No

11. This contract requires the University to pay more than $1,000,000 to the Other Party (vendor).
   - [ ] Yes
   - [ ] No

12. This contract relates to a political campaign.
   - [ ] Yes
   - [ ] No

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

Thank you for submitting!

Contract Summary:

[Details of the contract summary]

[Confirmation button: Finish]
11. To see your contract in the workflow, go to the eCLAWS Home dashboard and the “My Agreements & Contracts – In Process” section; select the record ID to view the summary:

```
<table>
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<tr>
<th>eCLAWS ID</th>
<th>NU Contact</th>
<th>Other Party</th>
<th>Purpose</th>
<th>Type</th>
<th>Start - End Dates</th>
<th>Last Modified</th>
<th>Status</th>
</tr>
</thead>
</table>
```

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

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Contract/Agreement Data

General Information

- Submitter: Joan M. Cyr
- NU Contact: Jacob Mattiacci Glickel
- Gatekeeper: Blanca Olimpo Tejeda
- Other Party: Marriott
- Purpose: Business Purchase of Goods & Services
- Justification: Conference space for Sustainability meeting
- Approved Template: Approved Hotel Contract
- Template Modified: X: Not Modified

Additional Requirements

- Auto Review Date: -
- Confidentially Requested: X: No
- Expedited Review Requested: X: No
- Reason For Expedited Review: -

Other Party Signed Contract

- Changed By Other Party: X: No
- Work Started: X: No
- Previews Requested: X: No

Sign Off

- Has the Other Party signed the contract?: No

Less Comments

Joan M. Cyr commented at 06/05/2019 05:45 PM
"Hi Gatekeeper...Here's my Hotel Contract..call me with questions x 1224. Thanks!"
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 to relevant parties; those conversations are recorded in the “Informational Requests” tab in the left navigation:

a. Notes about Informational Request chat:
   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. 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)
   iii. Coming Soon: “Add Consult” where particular groups will be configured for questions directed to a group, e.g. Risk Services, Environmental Health/Safety, etc.

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.