

DocuSign CLM Executive Review

DocuSign CLM (Contract Lifecycle Management) is the approval module within DocuSign that happens before execution in DocuSign eSignature. The Executive Administrator will come into the workflow for any agreements that are above \$55,000. The Approval to Proceed (formerly known as the CAO Memo) is the initial workflow where the Department is requesting permission to execute a contract.

NOTE: The Approval to Proceed is a summary of the contract requested. Until you approve, there is **not** a draft of the contract. Once approved, CLM moves to the next step of generating a template and sending it through the workflow.

APPROVAL TO PROCEED LAYOUT

Request for Approval of Purchase of Professional Technical Services

04/01/2024

Supplier

The Community Safety Department wishes to enter into a professional technical agreement with **STANTEC CONSULTING INC.** The amount of the agreement is **\$56,000.00.**

Agreement
amount.

Brief detailed
contract summary.

Contract Summary: The Department of Community Safety would like to work with Stantec Consulting to assist us in project management. The project they will assist us in managing will be for the implementation of a new neighborhood watch program to further our efforts to increase public safety. The time of performance will be from 1/1/2024 - 12/31/2024.

In submitting this Request for Approval, I agree that I have reviewed and will comply with the rules of ethical conduct set out in the City's Conflict of Interest Code at Sections 3-3-1 et seq. and the Purchasing Ordinance at Sections 5-5-22 et seq.

Executive
Administrator
stamp will go
here if
approved.

Department Director: *Department Director* **Date:** 4/1/2024 10:44:18 AM
CPO: *Chief Procurement Officer* **Date:** 4/1/2024 10:51:21 AM
CAO: **Date:**

Approver time
stamp.

APPROVER SCREEN

The screenshot shows a web interface for an 'APPROVER SCREEN'. On the left is a vertical sidebar with five tabs: 'Attributes' (tag icon), 'Tasks' (checkbox icon), 'Activity' (circular arrow icon), 'Comments' (speech bubble icon), and 'Obligations' (flag icon). The 'Tasks' tab is highlighted with a red border. The main content area has a header explaining the task: 'You received this task for review because Contract Amount exceeds \$55,000. Please, review the contract and its Attributes (see Attributes tab on the left). If you click Approve, the contract will be routed for the next approval, if you click Deny, the contract will be routed to CCP for updates.' Below this is a section titled 'Your Response' containing two buttons: 'Approve' and 'Return To CCP'. A green callout box points to the 'Approve' button, stating: 'If you would like to grant permission for this agreement, click Approve, leave a comment, and the contract workflow will trigger.' Another green callout box points to the 'Return To CCP' button, stating: 'If the you do not want to grant permission, click Return to CCP (City Contract Person), and leave a comment explaining why. It will then go back to the CCP where they have the ability to cancel or resubmit.' Below the buttons is a section titled '*Comments' with a text input field. A green callout box points to this field, stating: 'This is where you will leave your comment when you Approve or Return to CCP. It is a required field.' On the right side of the screen, there is a document titled 'Request for Approval of Purchase' from 'The Community Safety Dep STANTEC CONSULTING'. The document includes a 'Summary' section that begins with 'The D' and 'Assist us in pr'.

Attributes

Tasks

Activity

Comments

Obligations

You received this task for review because Contract Amount exceeds \$55,000. Please, review the contract and its Attributes (see Attributes tab on the left). If you click Approve, the contract will be routed for the next approval, if you click Deny, the contract will be routed to CCP for updates.

Your Response

Approve

Return To CCP

*Comments

If you would like to grant permission for this agreement, click Approve, leave a comment, and the contract workflow will trigger.

If the you do not want to grant permission, click Return to CCP (City Contract Person), and leave a comment explaining why. It will then go back to the CCP where they have the ability to cancel or resubmit.

This is where you will leave your comment when you Approve or Return to CCP. It is a required field.

Request for Approval of Purchase

The Community Safety Dep
STANTEC CONSULTING

Summary: The D
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Department Director: Dep
CPO: Chief Department C

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E-signature is a separate module from CLM within DocuSign. Once the contract is approved in CLM, it flows into E-Signature for execution. Executive Administrators are in a signing group. If you accidentally open an envelope that isn't for you to sign, please follow the steps below.

When in the envelope, click on “Other Actions” on the top right of the envelope, then click “Finish” later. **NOTE:** If you do not do this, and just exit the window, it will **not** allow other Executive Administrator in that signing group to access the envelope.

The screenshot displays the DocuSign envelope interface. At the top, a blue header bar contains the text "review the documents below." and two buttons: "FINISH" and "OTHER ACTIONS". Below the header, a toolbar includes icons for zooming, downloading, and printing. A red circle with the number "2" is placed over the toolbar, with a green arrow pointing to the "OTHER ACTIONS" dropdown menu. The dropdown menu is open, showing options: "Finish Later", "Print & Sign", "Assign to Someone Else", "Void", "Help & Support", "About DocuSign", "View History", "View Certificate (PDF)", "View Electronic Record and Signature Disclosure", "Session Information", and "Report Abuse". A red circle with the number "1" is placed over the "OTHER ACTIONS" button, with a green arrow pointing to the dropdown menu. The main content area shows a document preview with a yellow "START" button on the left. The document text includes "DocuSign Envelope ID: 33F725C1-2C22-4244-8CE9-B85EFBCC81E3" and a red warning: "DEMONSTRATION DOCUMENT ONLY PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE 999 3rd Ave, Suite 1700 • Seattle • Washington 98104 www.docusign.com".