



# UCM Read-Only Manual

A Guide to Universal Contract Manager (UCM)

**Edited by Steven B. Snyder**

iContracts Inc. | 214 W. Main Street, Suite 210, Moorestown, NJ 08057



## *iContracts Mission Statement*

---

*iContracts* is a leading provider of contract, compliance, and revenue management solutions for a variety of industries including Life Sciences, Healthcare, and Education.

*iContracts'* comprehensive suite of fully integrated cloud-based solutions helps companies improve collaboration, expand visibility, reduce costs, stop revenue leakage, and optimize performance.

# Table of Contents

<p>Logging into iContracts UCM .....5</p> <p>Updating Your User Profile .....6</p> <p style="padding-left: 20px;">Email Signature Setting .....6</p> <p style="padding-left: 20px;">Shared Views Settings .....6</p> <p style="padding-left: 20px;">Changing your Password .....7</p> <p>The Enterprise Ribbon: Home Screen.....8</p> <p style="padding-left: 20px;">Navigating Inside UCM .....9</p> <p style="padding-left: 20px;">Finding a Contract with the Global Search .....10</p> <p style="padding-left: 20px;">Search Across .....10</p> <p style="padding-left: 20px;">Include Archived .....10</p> <p>The Enterprise Ribbon: Contracts Tab .....11</p> <p style="padding-left: 20px;">Working with the Grids .....12</p> <p style="padding-left: 20px;">Arranging the Grid.....12</p> <p style="padding-left: 20px;">Using LRT Device (for Contract Columns).....13</p> <p style="padding-left: 20px;">Creating a View .....15</p> <p style="padding-left: 20px;">Viewing Contracts that match the following criteria .....17</p> <p style="padding-left: 20px;">Defining Default Fields and Sequences .....18</p> <p style="padding-left: 20px;">Arranging Grid Columns .....18</p> <p>The Enterprise Ribbon: Attachments Tab .....20</p> <p style="padding-left: 20px;">Working with the Attachments Grid .....20</p> <p style="padding-left: 20px;">Group by this Field .....21</p> <p style="padding-left: 20px;">Backup Contract Attachments from the Attachments Tab.....21</p> <p style="padding-left: 20px;">Attachment Views .....22</p> <p style="padding-left: 20px;">Tips and Tricks for Making the Attachments Tab Work for You .....23</p> <p style="padding-left: 20px;">Tip: Rearrange Your Columns .....23</p> <p style="padding-left: 20px;">Tip: Group Attachments by Category, Contract, or State .....23</p>	<p style="padding-left: 20px;">Tip: Turn off Grouping for a cleaner looking grid..... 23</p> <p style="padding-left: 20px;">Examples of Practical Uses of Views..... 24</p> <p style="padding-left: 20px;">All BAA’s grouped by Category..... 24</p> <p style="padding-left: 20px;">Yearly Contract Reviews (by Category)..... 24</p> <p style="padding-left: 20px;">All Final or Signed (by State) ..... 25</p> <p>The Enterprise Ribbon: Notes Tab ..... 26</p> <p>The Enterprise Ribbon: Milestones Tab ..... 27</p> <p>The Enterprise Ribbon: Activities Tab ..... 28</p> <p style="padding-left: 20px;">Completing an Activity..... 29</p> <p>The Home Tab: Entering Contracts into UCM ..... 31</p> <p style="padding-left: 20px;">Using a Template ..... 31</p> <p style="padding-left: 20px;">1: Create new Contract Container ..... 31</p> <p style="padding-left: 20px;">2: Add to existing Contract Container ..... 31</p> <p style="padding-left: 20px;">3: Do not associate with any Contract Container ..... 31</p> <p style="padding-left: 20px;">Entering Defined Contract Fields..... 32</p> <p style="padding-left: 20px;">Adding Additional Documents ..... 33</p> <p style="padding-left: 20px;">Document Library ..... 34</p> <p>The Contract Ribbon: Inside the Contract Container..... 35</p> <p style="padding-left: 20px;">Summary Tab ..... 35</p> <p style="padding-left: 20px;">Summary Tab Items of Interest..... 37</p> <p style="padding-left: 20px;">Workflow..... 37</p> <p style="padding-left: 20px;">Fields..... 37</p> <p style="padding-left: 20px;">Countdown for Tracking X Date ..... 37</p> <p style="padding-left: 20px;">Alerts..... 37</p> <p>The Contract Ribbon: Attachment(s) Tab ..... 38</p> <p style="padding-left: 20px;">Navigating the Attachment(s) Tab..... 38</p> <p style="padding-left: 20px;">Primary Document..... 39</p> <p style="padding-left: 20px;">Explorer Mode – An Optional Feature..... 39</p> <p>The Contract Ribbon: Notes Tab..... 40</p>
--	---

The Contract Ribbon: Related Contract Tab	41
The Contract Ribbon: Email Tab	42
Email Attachments	42
The Contract Ribbon: Milestones Tab	43
The Contract Ribbon: Activities Tab	44
The Contract Ribbon: History Tab	45
A Closer Look at Contract Fields	46
Contract Reviewers	47
Appendix A - Default Contract Fields (Attributes)	49
Attributes Not Shown	51
Appendix B - Glossary of Terms	52
Appendix C – Additional Help for New Features/Enhancements	56
Contract Alerts	56
The Countdown on the Contract Container	56
Receiving the Alert	56
Setting the “Last Contract Management System Containers Accessed” on the UCM Home Page	58
Concurrent Stage Reviews	59
Using Concurrent Stage Approvals	59
Approvals	60
Rejections	61
Concurrent Stage Email Notifications	62
Automatically Advancing Stages	63
Warning Messages	63
Advancing A Stage Before All Assignees Approve	63
After All Assignees Approve	63
Moving a Stage Backwards After All Assignees Approved	63
History and Note Tabs Updated	64

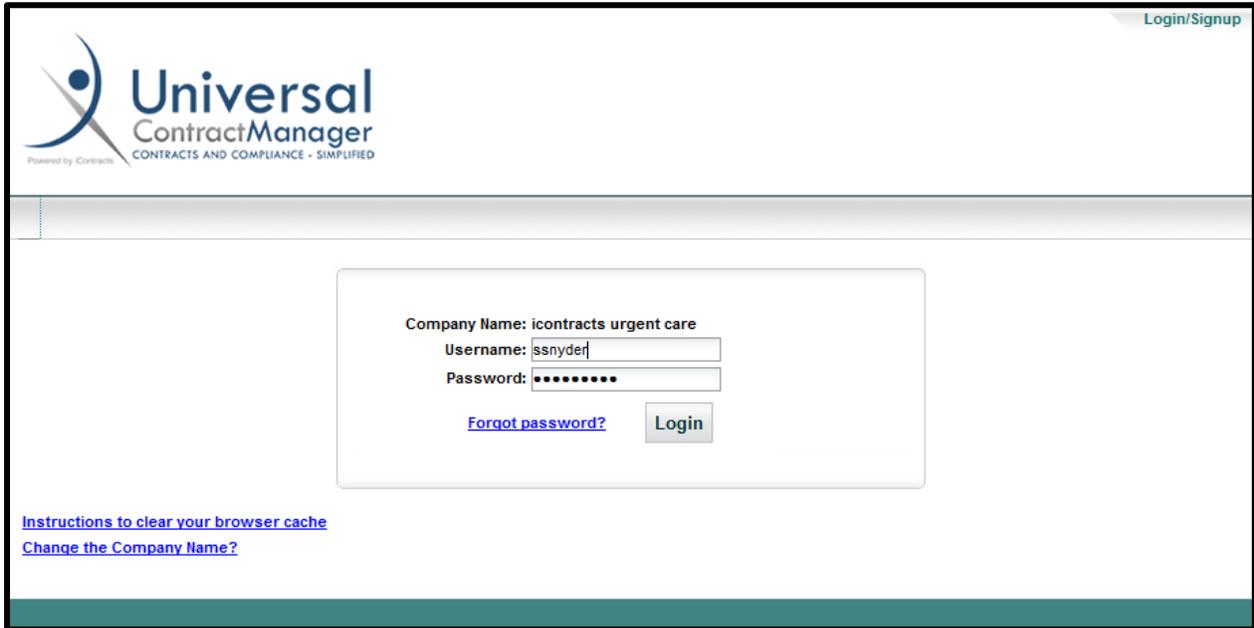
Mixing ANDs & ORs in Contract Views Criteria – The Advanced Search Function	65
Countdown on Contract Summary	69
Viewing Countdown Alerts on the Summary Tab	69
Workflow Stage Reminders and Escalation Emails	70
Email Notifications	70
Email Responses to Activities	71
Receiving the Activity Notification Emails	71
Assigned To Users	71
Assigned To Others	72
Completing Activity via Email Button	73

# Logging into iContracts UCM

Upon setup, your company portal will be assigned, along with initial Usernames and Security Access.

**<https://ucm.iContracts.com>**

Your system administrator sets up your account in UCM. This generates an email, with a hyperlink to create your initial password. Click on the link to setup your new password. Once your password is saved, you are then directed to the UCM Login Screen. Future logins are done from this page (see the URL above). UCM is compatible with all major web browsers and we suggest you **bookmark this page** for easier access.



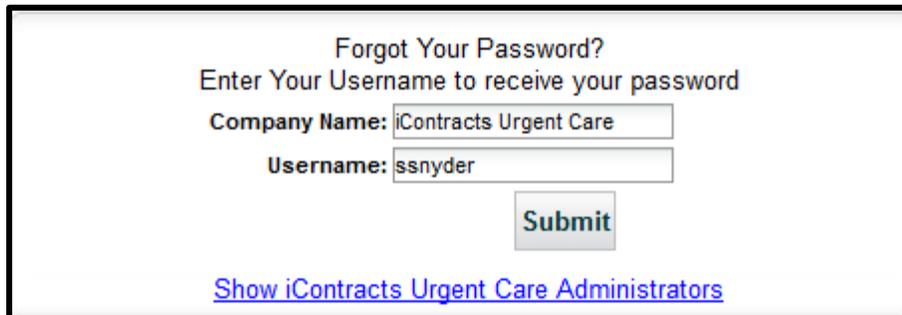
Universal Contract Manager  
CONTRACTS AND COMPLIANCE - SIMPLIFIED

Company Name: icontracts urgent care  
Username: ssnyder  
Password: ●●●●●●

[Forgot password?](#)

[Instructions to clear your browser cache](#)  
[Change the Company Name?](#)

If you ever forget your password, click on the *Forgot Password?* link and follow the prompts. When you click **Submit**, this generates an email to you, which provides a new link to reset your password. Click on this link to be redirected to a screen where you can create a new password. There will be a second text field to confirm your new password. These two password entries must match, as well as follow your Password Rules.



Forgot Your Password?  
Enter Your Username to receive your password

Company Name: iContracts Urgent Care  
Username: ssnyder

[Show iContracts Urgent Care Administrators](#)

You can also click the “[Show \[company name\] Administrators](#)” link to view your administrators for help.

**Note:** *Your new password cannot be the same as your current password, must meet the minimum character requirements for your company, must include at least one uppercase character, and must have at least one numeric character.*

# Updating Your User Profile

You can update your profile by clicking on the *“Profile/Help”* link at the top right of any page inside of UCM. Most settings in this area do not require intervention from your UCM Administrator. Enter the information you would like to change or update, then click *“Save”*.



**Only a System Administrator can change your Username, User Type, or Email address.**

1 In the **Support Center**, you can download the manual you are currently reading, or find the Read-Only Training Video Links. There’s also a link to view the System Admin Directory. If enabled, you can also download the Edit in Cloud Plugin (Chrome browsers only).

### Email Signature Setting

2 Currently, the email signatures are text-only (no graphics).

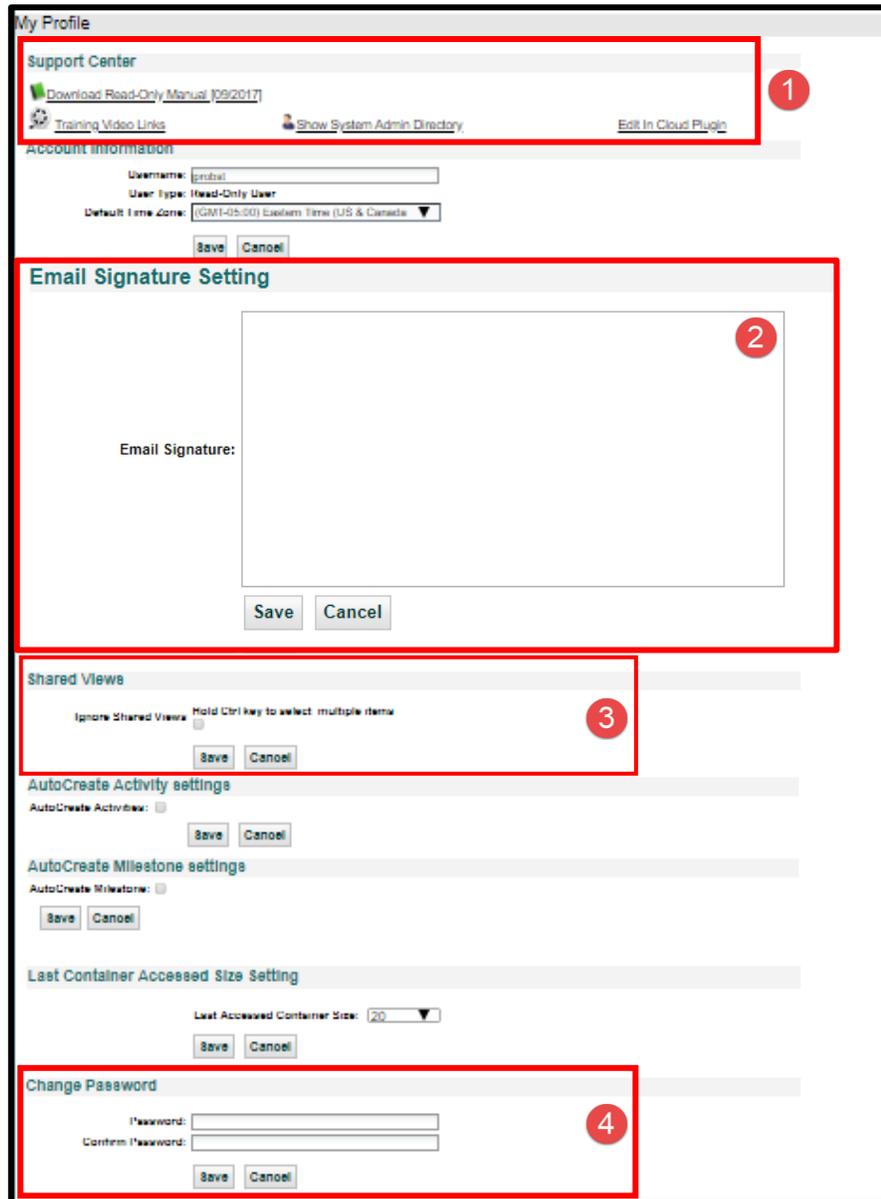
Type your signature in the **Email Signature** text box, or you can copy your signature from another email program (remember, no graphics here). Edit the text box to “clean up” the signature as needed.

Click the **Save** button to update your settings. You can also delete or edit a signature setting.

### Shared Views Settings

3 In this area, you can select to Ignore Shared Views from other Users. This can be helpful if your organization has a large number of Users.

To select multiple Users, hold down the CTRL key.



### **Changing your Password**

- 4 At the bottom of this screen is an area where you may change your current password. This is the *only* area in UCM where a non-Admin user can change their own password. Otherwise, your UCM Administrator can send you a special email with a Password Reset link.

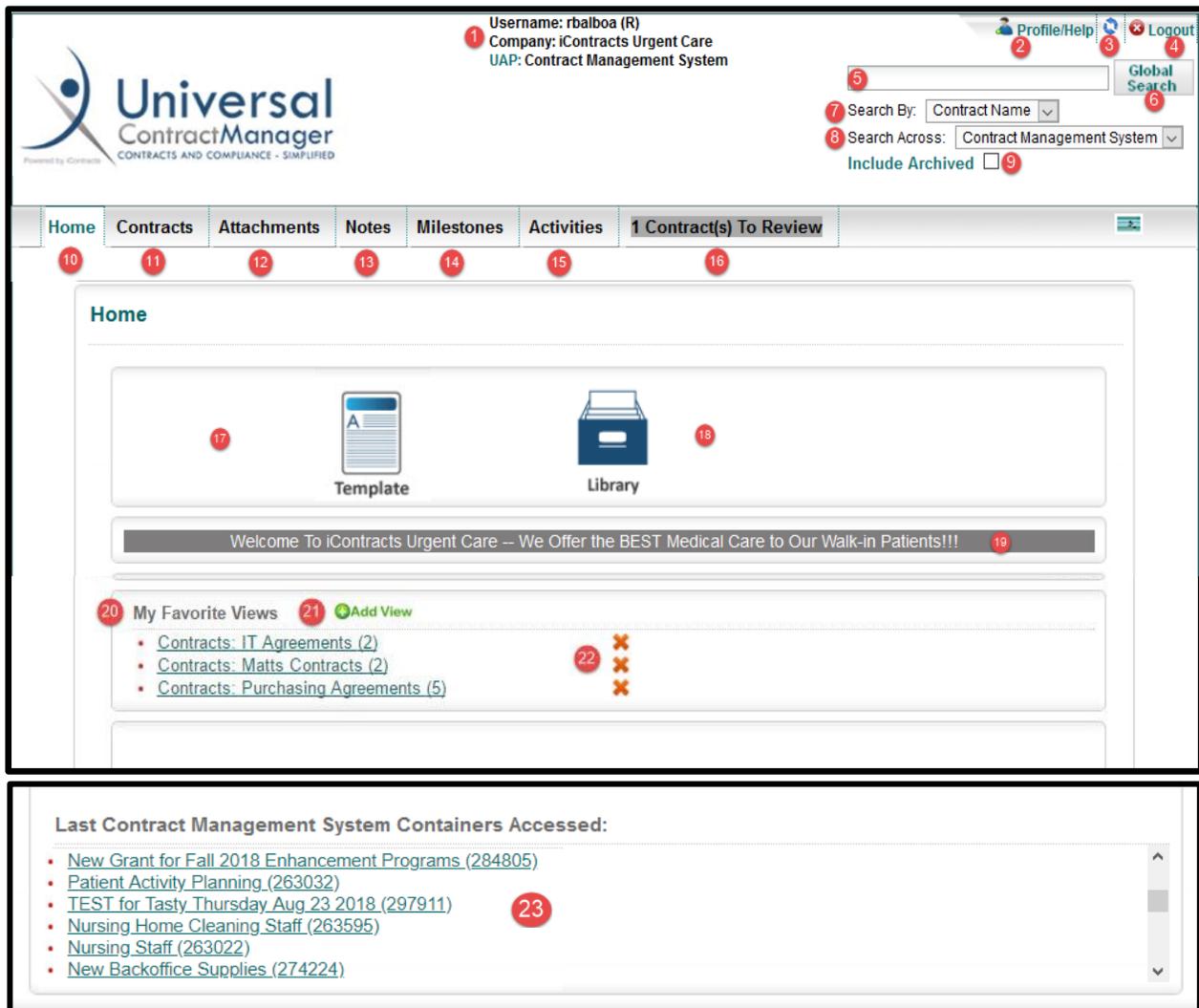
Each company can set their Password Rules but generally:

- Passwords must be at least six characters in length,
- Contain at least one Uppercase letter,
- Contain at least one number, and
- Must not be identical to the previous password (*but can be identical to any other previous passwords*).

 The *Save* button beneath this area pertains only to *Change Password*. All other areas on this screen have their own *Save* buttons.

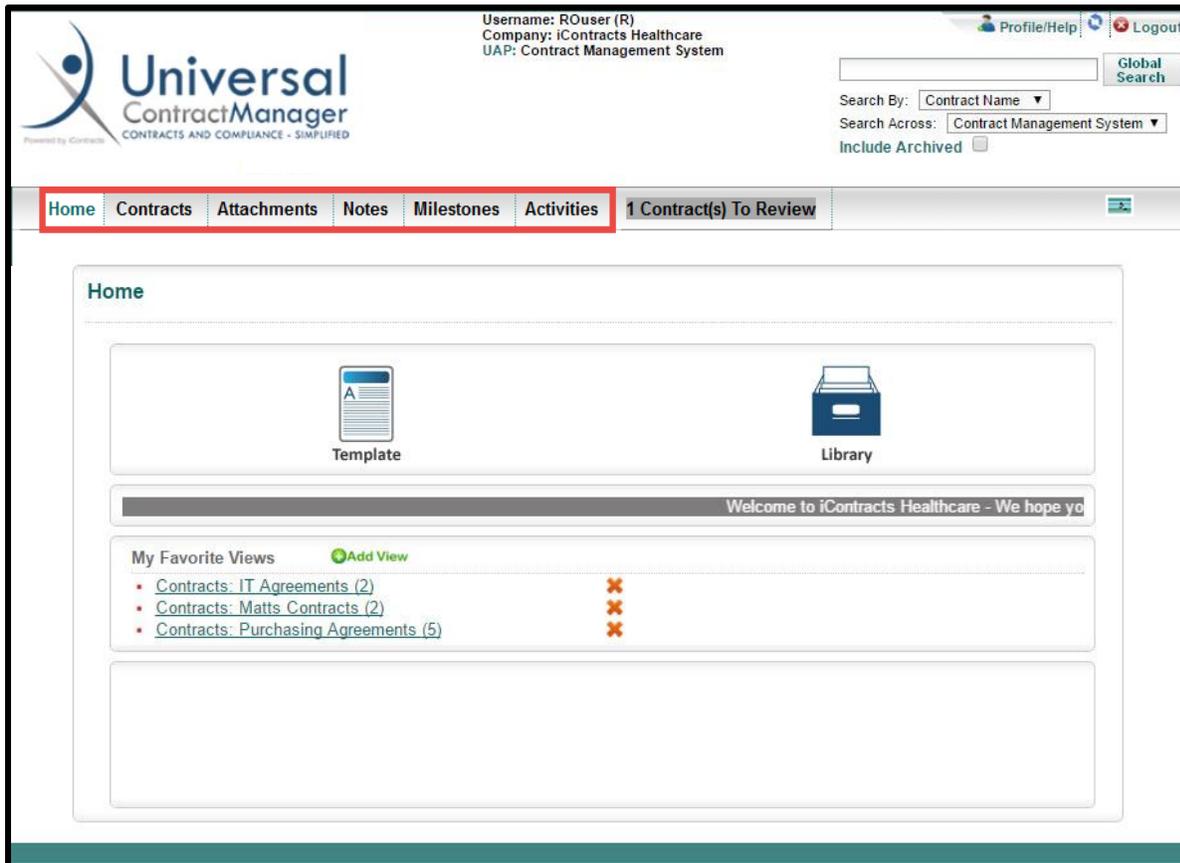
 Companies configured for **Active Director** or **Single Sign On** will NOT have access to this Change Password option.

# The Enterprise Ribbon: Home Screen



- |   |   |
|---|---|
| <ol style="list-style-type: none"> <li>1. Login Information (Username/Co/Object)<br/>* Username shows <b>(R)</b> for "Read-Only".</li> <li>2. Profile/Help</li> <li>3. Refresh User Permissions (the "dolphins")</li> <li>4. Logout Icon</li> <li>5. Global Search Field</li> <li>6. Execute Global Search Button</li> <li>7. Search By (Drop-Down) Options</li> <li>8. Search Across Objects (if applicable)</li> <li>9. Include Archived Contracts Checkbox</li> <li>10. Home Screen Button</li> <li>11. Contracts Tab Button</li> <li>12. Attachments Tab Button</li> <li>13. Notes Tab Button</li> <li>14. Milestones Tab Button</li> </ol> | <ol style="list-style-type: none"> <li>15. Activities Tab Button</li> <li>16. Contract(s) To Review Tab Button</li> <li>17. Template Button (if Applicable)</li> <li>18. Document Library Button (if Applicable)</li> <li>19. On Screen Messages from Admins</li> <li>20. My Favorite Views Area</li> <li>21. Add View to Favorites</li> <li>22. Delete View from Favorites<br/>(Does not delete View)</li> <li>23. Last Contract Containers Accessed<br/>(Up to 30, depending on your Profile Settings)</li> </ol> |
|---|---|

## Navigating Inside UCM



Navigating and using iContracts UCM is extremely straightforward, logical, and simple.

Across the top of each page is the **Enterprise Navigation Ribbon**. By clicking on any tab on the Enterprise Ribbon, you can navigate through different areas inside the system (based on your access rights set by UCM Administrators).

For example, by clicking on the **Contracts** tab, you will navigate to the area you can see your full listing of Contracts. This is also, where you will create your own on-screen Views of contract data. You can create as many custom ad hoc and saved reports as needed. Of course, your UCM Admin has to give you access rights to create and edit these reports.

The **Attachments** tab will show your full listing of documents within UCM. In this area, you can create views based on the data surrounding an attachment.

The **Notes** tab will show a listing of notes across different contracts. You can create views as well.

The **Milestones** tab allows you to take a look at the Milestone notifications. These are based on dates and are sent to Users by email. Again, you can create views in this area to work with these notifications from the system (based on access rights set by your UCM Administrator).

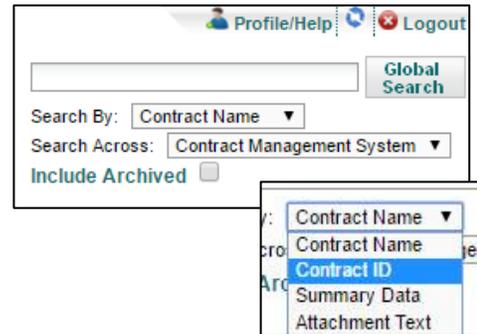
Lastly, **Activities** tab will show your full listing of Activities. These are essentially tasks that have been assigned to different Users inside the system. You can create views in this area, such as when completed.

## Finding a Contract with the Global Search

UCM offers robust and easy-to-use searching capabilities through the **Global Search** function.

Using the Global Search, you can find Containers in the system by:

- Contract Name
- Contract ID
- Summary Data
- Attachment Text



The Global Search will work for partial or full word searches by *Contract Name*. This field will allow you to search by whatever the Contract Container has been named in your system.

*Contract ID* will direct you to the container without the need to pick the correct Contract from a list of matches. The Contract ID is unique to each contract.

*Summary Data* allows you to search on any field data that is tracked in your system. This could be a date, a username, document name, or anything else that shows up on the Summary Data tab within the Container.

*Attachment Text* is the last option and allows you to search through the words in the actual documents in order to find a particular Container in your system. For example, searching for a document or documents by content. Users can search specific phrases by surrounding the text with double quotes.

### Search Across

Search Across allows organizations with multiple UAP Objects to search through those different modules. If this option does not appear, you either do not have another module at your organization or you do not have access to the other module(s).

### Include Archived

If the Container you are looking for is in the Archive, you will need to select 'Include Archived' in order for it to show up in the search results.

Archived Contracts are not listed in the regular search results, nor do they show up in Views (unless this option is selected there as well), nor in the regular Contracts Grid.

# The Enterprise Ribbon: Contracts Tab

1. Enterprise Ribbon (Items visible here are based on individual user permissions)
2. Contract Views Panel
3. Saved Views
4. Shared View
5. Delete View (if given access to edit/delete views)
6. Add New View
7. Report Button
8. Records Per Page View Selector
9. Field Header Row
10. View of Listed Contracts
11. Page Number Navigation Bar
12. Refresh Grid Button (“dolphins”)
13. Displaying Records/ Total Records Indicator

The Contracts tab provides users with a simple way to access all or any filtered set of Contracts, which we call “Views”. In the Contract Views panel to the left, you can add or modify an unlimited number of saved searches that contain criteria such as multilevel sorting, page layouts, and the ability to filter on any combination of Contract data. If you can delete a view, you can edit a view.

Users can click on any column to sort your list in ascending or descending order, or to select which columns will display in the active list pane. Grid changes are saved on a *per user* basis only.

Click on the **Report** button in the upper right-hand corner of the page (only visible depending on Permissions assigned by an Administrator) to download the complete file in an Excel CSV (comma-delimited) readable format of Contracts from their active contracts grid. More on this feature later.

Click on any Contract Name to navigate from the contracts grid to a **Summary tab** for the Contract Container.

## Working with the Grids

Contract ID	ContractName	ContractTypeName	StageName	Owner	Description	CreatedOn	U
<a href="#">308051</a>	<a href="#">214 West Main Street</a>	Lease Agreements	Fully Executed	Joe Deluccia		08/10/2015	0
<a href="#">308057</a>	<a href="#">22 South North Blvd.</a>	Lease Agreements	Fully Executed	Joe Deluccia		08/10/2015	0
<a href="#">308056</a>	<a href="#">5322 N south ave</a>	Lease Agreements	Fully Executed	Joe Deluccia		08/10/2015	0
<a href="#">294281</a>	<a href="#">Abby Lockhart</a>	Employment Agreement	Employee Sign Off	Marilyn Rivera	Employment Agreement f...	06/23/2015	0
<a href="#">294275</a>	<a href="#">Bonnie Dimmick - RNP</a>	Employment Agreement	Employee Sign Off	Marilyn Rivera	Employment Agreement f...	06/23/2015	0
<a href="#">198261</a>	<a href="#">EMR Software Agreement</a>	Software Agreements	Final	Brian Potenski		03/13/2014	0
<a href="#">260602</a>	<a href="#">HAL 9000 Computer System</a>	IT	IT Review	Brian Potenski	Agreement for the purcha...	03/12/2015	0
<a href="#">265623</a>	<a href="#">HAL 9000 Computer System Upg...</a>	IT	Other Party Signature	Brian Potenski	Purchasing system upgrad...	04/15/2015	0
<a href="#">260571</a>	<a href="#">Harris Neil MD</a>	Physician Agreements	Fully Executed	Brian Potenski		03/12/2015	0
<a href="#">302543</a>	<a href="#">Hawkeye Lease</a>	Lease Agreements	Legal Review	Matthew Robinson	Lease for Dr. Pierce to ren...	07/17/2015	0

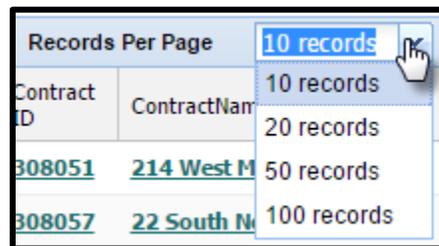
Records Per Page: 10 records

Page 1 of 2

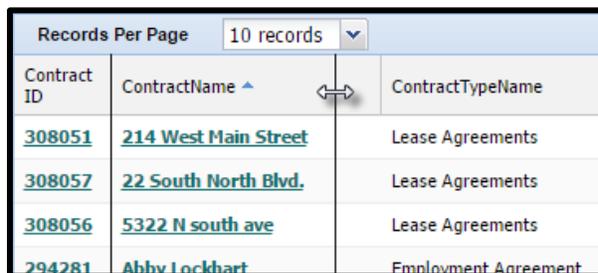
Displaying records 1 - 10 of 19

### Arranging the Grid

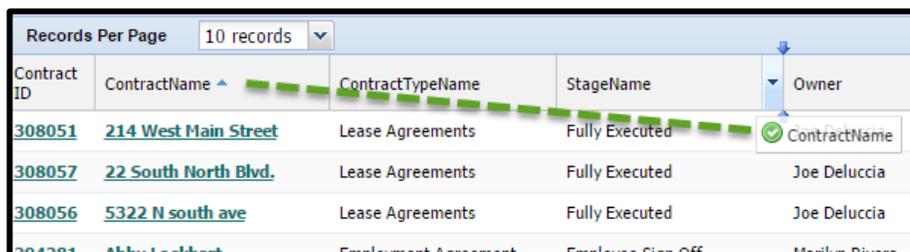
Use the drop-down list to select the number of records showing per page.



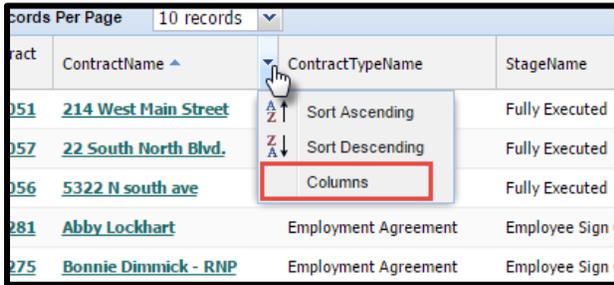
Click and drag between column headings to resize the column width.



Click and drag in the middle of any heading to change the order of displayed columns.



When hovering your mouse over any column heading a drop-down arrow appears. From this arrow, you can click to sort by ascending or descending order.



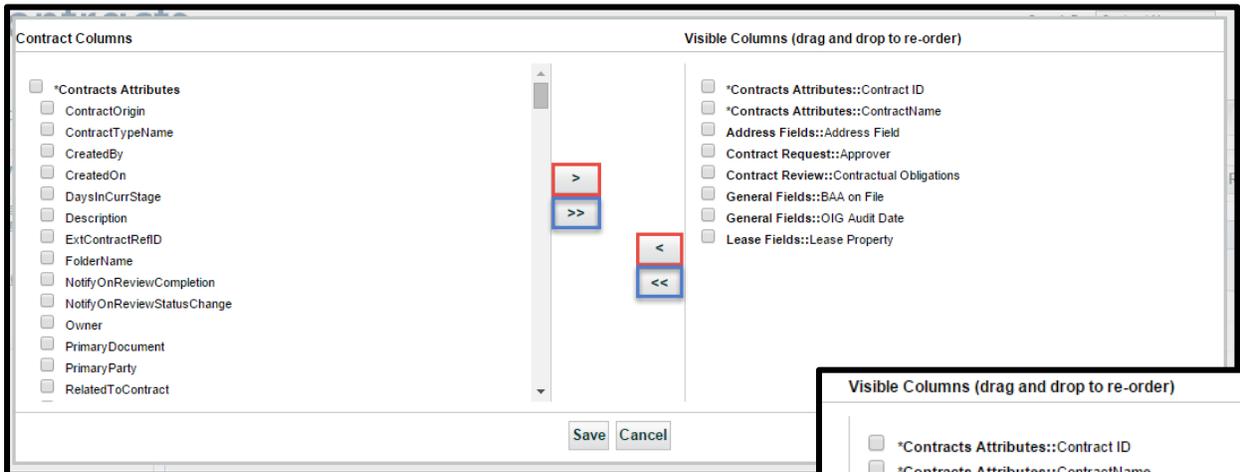
The third option on this list is *Columns*. This will bring up an area where you can decide what data fields will show as your column headings in the Grid.

In this new pop-up (sometimes referred to as the LRT Device), listed on the left are all the fields that are available for selection. **\*Contract Attributes** at the top of this list contains the “out-of-the-box”

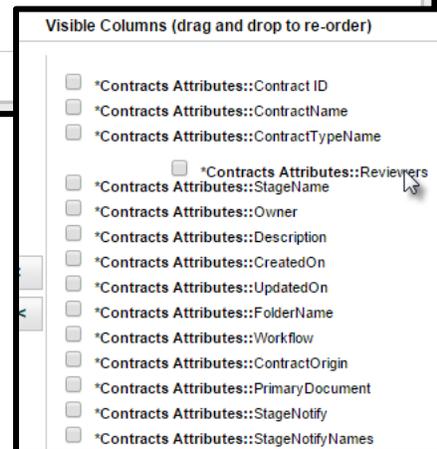
fields that come with the software (indicated by the \*). However, beneath these fields, are all the “custom” fields set up for your system by your UCM Administrators.

### Using LRT Device (for Contract Columns)

On the right side, the fields that appear as column headings on the grid will show, in which top-to-bottom appear as left-to-right in the grid. Clicking and dragging vertically will change the order of appearance in the grid. If you select a large number of fields for your grid, dragging a field up or down will cause the list to auto-scroll. This makes it very easy to move fields from the far right of your grid to the left.



The single arrows (in red) will move only the fields that you have selected with their corresponding checkbox from one side to the other. The double arrows (in blue) will move ALL fields from one side to the other. This makes it easy to start from scratch and rearrange your grid as needed. Select the double arrow from the right side to clear your visible columns. Then select what you would like to see in your grid from the options on the left and move them over using the single arrow on the left.



When you are finished making changes, click *Save*. If you do not want to change anything in this area, click *Cancel* and you will be brought back to your unchanged grid.

Clicking on any column heading will sort the grid based on the data in that column in ascending order or by clicking a second time in descending order. Any visible column can sort the grid by using this method. A darkened shade and a small triangular arrow pointing upward showing ascending sorting or downward for descending sorting indicate the column is sorting the contracts in your grid.

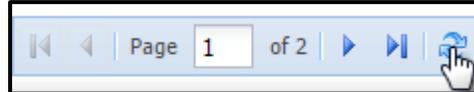


Records Per Page 10 records			
Contract ID	ContractName ▲	ContractTypeName	StageN
<a href="#">308051</a>	<a href="#">214 West Main Street</a>	Lease Agreements	Fully Ex
<a href="#">308057</a>	<a href="#">22 South North Blvd.</a>	Lease Agreements	Fully Ex
<a href="#">308056</a>	<a href="#">5322 N south ave</a>	Lease Agreements	Fully Ex

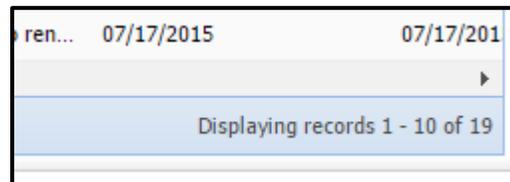
At the bottom-left of the grid, you can find the page number indicator and navigation area. To change pages, you can either use the left or right arrows, or type in the page number you would like to see.



To refresh the listing of Contracts in the grid (perhaps another User updated a date contained in any of the visible columns since it was last parsed) click on the circular arrows on the right.



Finally, on the far bottom right, there will be a listing of how many total Contracts match the entered criteria.



## Creating a View

Views are customizable real-time queries that can be a one-time use or named, saved, and used repeatedly. Views narrow and simplify the list of contracts and show specific fields pertaining to the task or goal of the search. To create your own Views, click on the **Add New View** button on the bottom of the Contract Views area.

The screenshot shows the Universal ContractManager interface. At the top, the user is logged in as 'mfink (R-R)' from 'Contracts Nursing Home'. The 'Contract Views' section is highlighted with a red box, showing options to 'View All Contracts', 'Owner Contracts (0)', and 'Add New View'. The main area displays a table of contracts with the following data:

Contract ID	ContractName	ContractTypeName	StageName	Owner	Description	CreatedOn	U
263032	<a href="#">Patient Activity Planning</a>	All Contracts	Active	Albee Seenya	Hiring a "Party Planner" fo...	10/16/2017	0
263450	<a href="#">Gerontology Physicians Group</a>	All Contracts	Active	Darlene Yonkers	Master Document -- multi...	10/26/2017	0
263595	<a href="#">Nursing Home Cleaning Staff</a>	All Contracts	Active	Roger Smith		11/30/2017	0
274224	<a href="#">New Backoffice Supplies</a>	All Contracts	Active	Steven Snyder	Used for documentation p...	12/12/2017	0
284118	<a href="#">TEST B for July 9, 2018</a>	All Contracts	Executed	Steven Snyder	test for ticket 3048.	01/03/2018	0
284126	<a href="#">TEST for Using Concurrent Appro...</a>	All Contracts	Executed	Steven Snyder	Currently being used for t...	01/10/2018	0
284172	<a href="#">Sample Nursing HR Agreement w...</a>	All Contracts	Active	Albee Seenya	Sample CC for practice usi...	01/16/2018	0
284173	<a href="#">Sample Nursing HR Agreement 2</a>	All Contracts	Active	Steven Snyder	Sample CC for practice usi...	01/16/2018	0
284174	<a href="#">Sample Nursing HR Agreement 3</a>	All Contracts	Active	Albee Seenya	Sample CC for practice usi...	01/16/2018	0
284175	<a href="#">Sample Nursing HR Agreement 4</a>	All Contracts	Active	Steven Snyder	Sample CC for practice usi...	01/16/2018	0

### Keep in mind:

- To display a **Saved View** (see the red dot in front of it?), click on its name in the list.
- To edit a **Saved View** (if you have been given access), click on the pencil icon  to the right of the saved view's name.
- To delete a **Saved View** (if you have been given access), click on the **X** to the right of the saved view's name.
- The **(#)** next to the saved view's name shows the number of matching contracts.
- The **S** icon to the right of a View's Name indicates that it is a View created by another user and **Shared by** them to you. If you delete a Shared View, the originating user will still be able to see and re-share their View with you again. If you hover your mouse pointer over the **S** icon, you can see who the view's author is.
- To create a report, or export data to a spreadsheet, click on the **Report** button at the top of the header and a CSV file will be downloaded to your desktop for formatting and further detailed analysis or graphing, using the default program (Excel).
- Use the **Advanced Search** function (click on the link for more information) to use parentheses to combine multiple "and/or" search criteria.

**There are three main areas on the screen to create/modify a View:**

1. Choose what field(s) you would like to run a query on and the criteria for that search (including Archived contracts if desired),
2. Decide what columns should show and where when the View is run,
3. Define a sort order for the Contracts in your View.
  - You also have the option to add Additional Statistics to your Views (*Sum* and *Average*) based on any numeric fields.
  - If you would like to keep this View in your listing of Views, check the box to **Save this View** and enter a name.

**Create/Modify Contracts View**

Get Contracts that match the following criteria: [Advanced Search](#)

1

+ Add Criteria  Include Archived

**Default Fields And Sequence** 2

Contract ID	ContractName	ContractTypeName	StageName	Owner	Description	CreatedOn
[Empty table body]						

**Default Sort Order** 3

Fields:   Ascending Order (A-Z)  Descending Order (Z-A)

Fields	Sort Order	Delete
[Empty table body]		

**Additional Statistics**

Display Count

Save this View

## Viewing Contracts that match the following criteria

You can use any of the fields in your system to find subsets of contracts that match the criteria you set up. You can also use any of the system-created fields (i.e. *Contract Attributes*).

*Note: Read-Only Users will only see the fields that they have permission to view.*

When a field is chosen as one of the Criterion of a View **(1)**, the modifiers that correspond to the Field Type will appear in a dropdown list to the right of that field. Choose a Modifier from your list of options, such as “=”, “less than”, “begins with”, or “is within the last X days” **(2)**. The options will vary depending on the type of field used to query (text, numeric, drop-down, multi-select, etc.). One example of a *Date field* criteria is shown in the sample Create/Modify Contracts View below.

The screenshot shows the 'Create/Modify Contracts View' interface. At the top, it says 'Get Contracts that match the following criteria:'. Below this, there is a search criteria configuration area. A dropdown menu is open, showing a list of fields. The field 'Expiration Date' is selected, indicated by a red circle '1'. To the right of the dropdown, a modifier 'is within the next X' is selected, indicated by a red circle '2'. Further to the right, a text input field contains the number '30'. Below the dropdown menu, there is a checkbox labeled 'Include Archived'. On the left side of the interface, there is a green '+ Add Criteria' button. Below the search criteria area, there are sections for 'Default Fields' and 'Default Sort Order'. The 'Default Fields' section shows a list of fields including 'Contract ID', 'Name', 'StageName', and 'Owner'. The 'Default Sort Order' section shows a dropdown menu with 'Ascend' and 'Descend' options. At the bottom of the interface, there is a section for 'Additional Settings'.

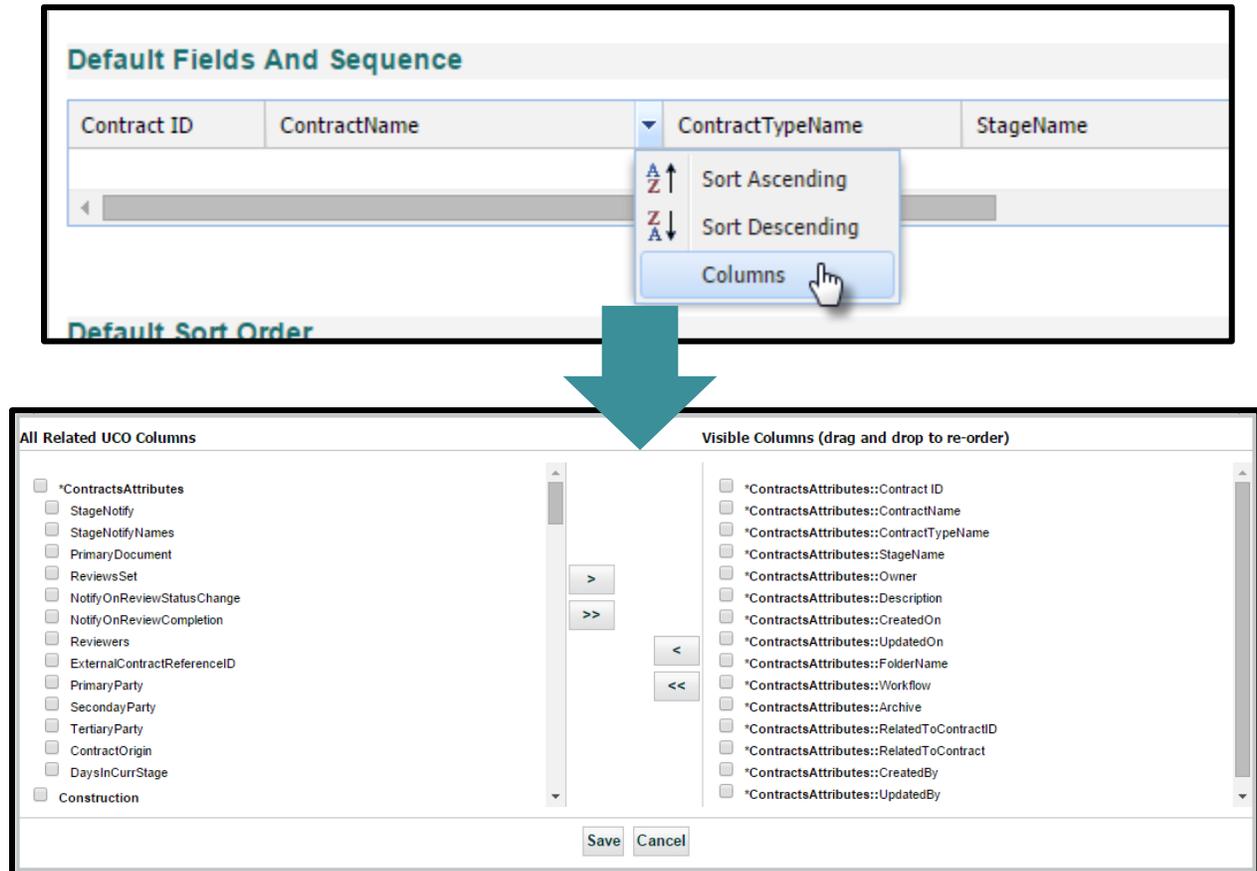
Some modifiers will prompt you for more information. For instance, “is within the next X days” will have another area open to the right of the modifier so you may tell the system how many days you would like to run the query on.

If you would like to narrow your search even more, click on the green “Add Criteria” link and add another line of criteria to query. Choose “and” to show the contracts that have both conditions to be true; choose “or” to show the contracts that have either condition true.

**Note:** Choosing both **AND/OR** with multiple lines of criteria will not work properly since the system is not looking at this as a hierarchy but rather all criteria simultaneously. Use “Advanced Search” for multiple criteria searching for both and/or within parentheses. This feature is explained in the Appendix C section of the manual from this [link](#).

## Defining Default Fields and Sequences

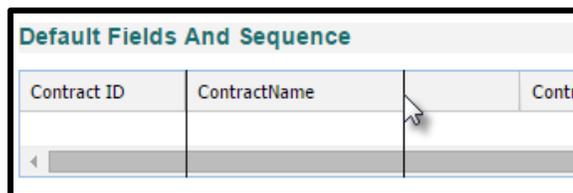
This area determines what Columns will appear in the Grid when you run your View. The easiest way to navigate this area is to simply choose from any of the Column headings the *Column Selector* and choose the option for *Columns*. A window will appear for you to check off which fields to appear in the headings.



For more information on using this Interface, see the section: [Working with the Grids](#).

## Arranging Grid Columns

Click on the line in between Columns to get the desired width for a Column. Since the Grid is “Saved” in a View, you must change your columns and widths from this area. Otherwise, changes made to the grid will not be remembered by UCM the way they are in areas like the Contracts tab.



Shown below is a *Completed View* screen. This view has two lines of criteria, the relevant columns and their order, an ascending sort by Expiration Date, and the option to *Save this View* for future reporting.

### Create/Modify Contracts View

Get Contracts that match the following criteria:

contains

>=  [remove](#)

Include Archived

---

#### Default Fields And Sequence

Contract ID	ContractName	Increase tied to CPI	Total Contract Value	Contract Term	Expiration Date	Invoice Number	Owner	Date Processed	PrimaryDocument
<input type="text" value="Contract Management System::Expiration Date"/>									

---

#### Default Sort Order

Fields:

Ascending Order (A-Z)  Descending Order (Z-A)

Fields	Sort Order	Delete
Contract Management System::Expiration Date	Ascending	

---

#### Additional Statistics

Display Count

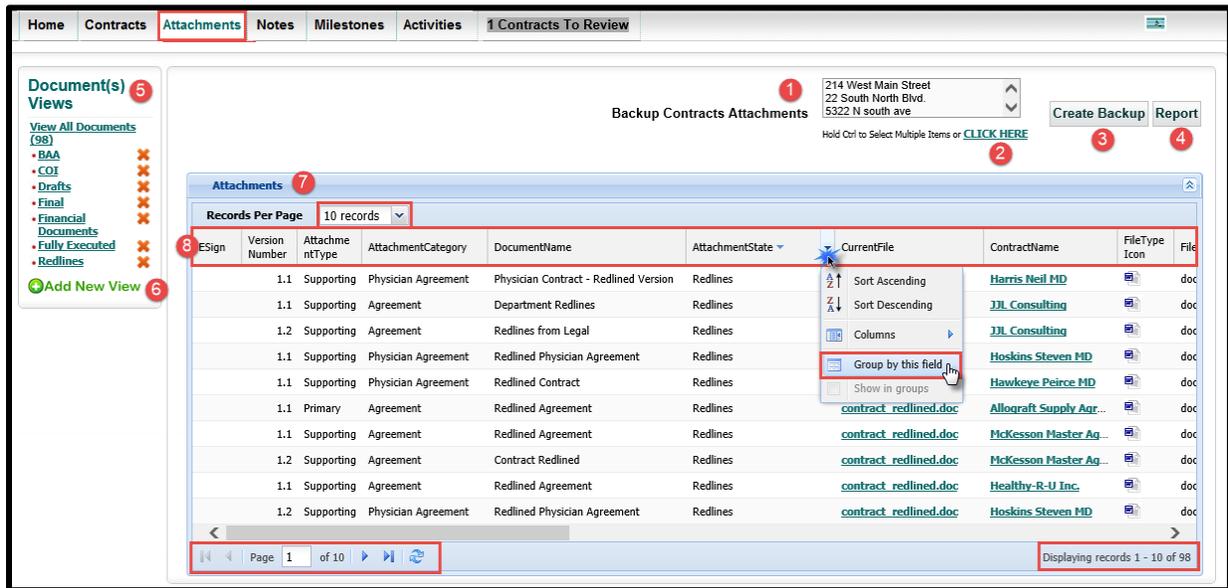
Save this View  Default View  
 \*View Name:

Share With Other Users  
 Schedule This View

Note: 18 characters of your View Name will show in Contracts Views, but the whole View Name will show on hover-over

You will use this same screen to edit your Views. If you choose, you can quickly create other similar Views by choosing the *Edit View* option after running a View, changing the criteria/fields and saving the View with a new name. For instance, this View will show all Purchasing contracts over \$150,000; if you were to change the criteria for Annual Cost to \$75,000 and give it a new name, you would have a completely separate View in addition to this one.

# The Enterprise Ribbon: Attachments Tab



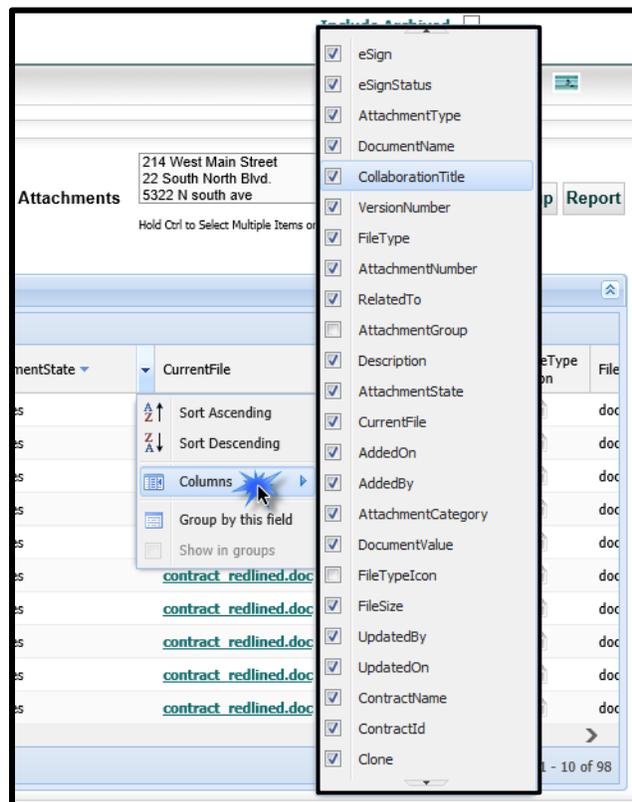
1. Backup Contract Attachments Area
2. Backup Contracts Selector
3. Create Backup Button
4. Report Grid Contents Button
5. Document Views Area
6. Add New View Button
7. Attachments Grid
8. Attachments Columns

The **Attachments** tab will allow you to view all of the contract documents available to you in your system. This area is useful for tracking the status of documents across multiple Contract Containers in your system at the same time. You can also create custom Views in this area to report on different subsets on documents. For instance, this screen show a View called *BAA's*. That View shows all the documents listed as a BAA in this system.

## Working with the Attachments Grid

Notice that the grid in this area works differently than the Contracts tab. The *Columns* option lists the available data points in checkboxes rather than in the side-by-side interface. This is because there are no custom fields in this area. However, the values are configurable.

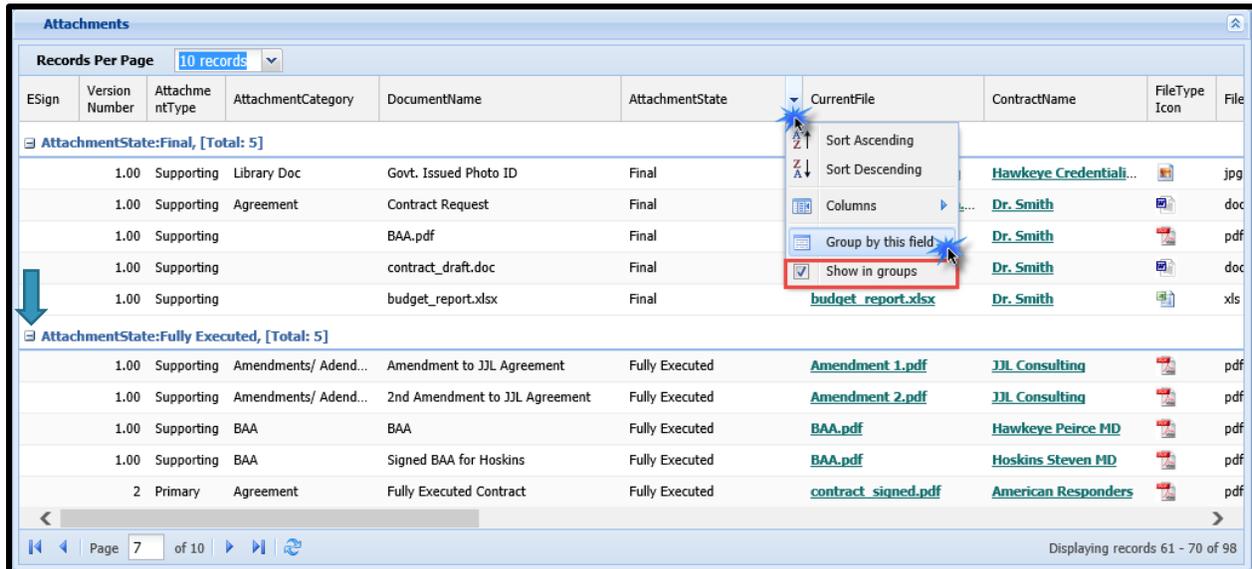
Uncheck any areas that you do not want showing in your grid then drag across the grid the column headings to their desired location.



## Group by this Field

The biggest difference in working with the Attachment tab grid is the ability to *Group by this field*. This option will allow you to view your attachments in groupings based on the data in those fields.

The individual groups are collapsible by clicking on the  icon (see arrow). This will allow you to hide unnecessary documents.



ESign	Version Number	AttachmentType	AttachmentCategory	DocumentName	AttachmentState	CurrentFile	ContractName	FileType Icon	File
<b>AttachmentState:Final, [Total: 5]</b>									
	1.00	Supporting	Library Doc	Govt. Issued Photo ID	Final				
	1.00	Supporting	Agreement	Contract Request	Final		Hawkeye Credentiali...		jpg
	1.00	Supporting		BAA.pdf	Final		Dr. Smith		doc
	1.00	Supporting		contract_draft.doc	Final		Dr. Smith		pdf
	1.00	Supporting		budget_report.xlsx	Final		Dr. Smith		doc
	1.00	Supporting		budget_report.xlsx	Final	budget_report.xlsx	Dr. Smith		xls
<b>AttachmentState:Fully Executed, [Total: 5]</b>									
	1.00	Supporting	Amendments/ Adend...	Amendment to JJL Agreement	Fully Executed	Amendment 1.pdf	JJL Consulting		pdf
	1.00	Supporting	Amendments/ Adend...	2nd Amendment to JJL Agreement	Fully Executed	Amendment 2.pdf	JJL Consulting		pdf
	1.00	Supporting	BAA	BAA	Fully Executed	BAA.pdf	Hawkeye Peirce MD		pdf
	1.00	Supporting	BAA	Signed BAA for Hoskins	Fully Executed	BAA.pdf	Hoskins Steven MD		pdf
	2	Primary	Agreement	Fully Executed Contract	Fully Executed	contract_signed.pdf	American Responders		pdf

You may remove groupings altogether by unchecking the option for “Show in Groups”

## Backup Contract Attachments from the Attachments Tab

To create a Backup of all the available documents for selected Contract Containers, simply navigate to the Backup Contract Documents area.



Use the window or the *Click Here* link to select which Contract Containers you would like to backup. Using the *Click Here* option will show all the available contracts in a side-by-side interface with the selections you have made. When finished selecting Contracts, click on the *Create Backup* button.

You are about to create a backup .ZIP file of all of the Attachments in this Contracts Container. Would you like to continue?

This will present you with a couple of pop-up boxes letting you know this action will create a Zip file that you can then download. Click **OK** to continue (or **Cancel** to exit). After that, the option to *Download Backup* appears between the *Create Backup* and *Report* buttons.

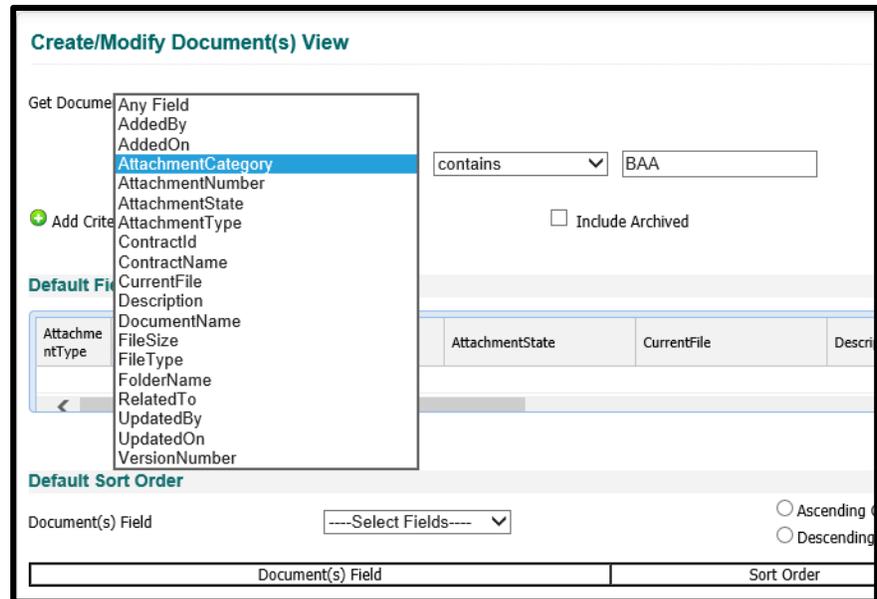
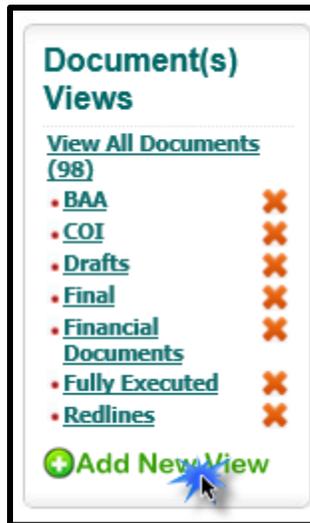
Click the "Download Backup" link and then "Save As" to save .ZIP file.  
 Prevent this page from creating additional dialogs

Create Backup Download Backup Report

Click this button to download your Zip file.

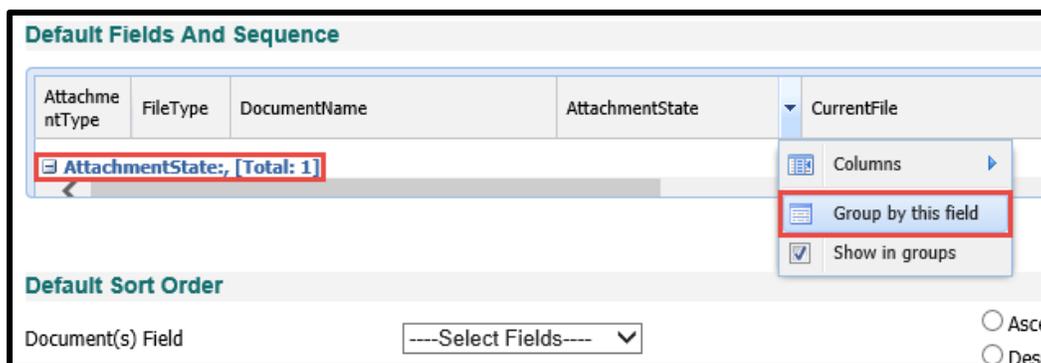
## Attachment Views

From this area, you create on-screen Views of subsets of Attachments based on any of the data points from the Attachments Tab. *Attachment State* and *Attachment Category* would be particularly useful here. The explanation for creating Views is available in the chapter titled [Creating a View](#).



By clicking on **Add New View**, you are directed to the View creation screen where you would then list the criteria for the View you would like to *Run*. You have the ability to create as many Saved and Ad Hoc Views as you would like.

From inside a view you can also choose to *Group by this field* using the Sort Indicator. This grouping will be applied to your View every time you run it. To remove the grouping, you will have to edit the View and deselect the option to *Show in Groups*.



When saving and running the view, the Grouping defined in the Default Fields and Sequence area of the View persists. However, if you ever want to change this grouping, you can always edit the view and choose another field to group by or uncheck the *Show in Groups* option.

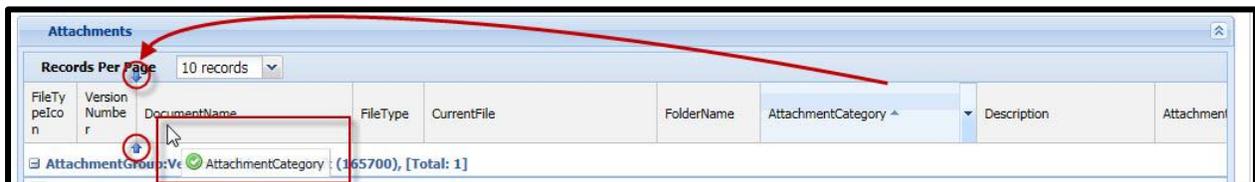
## Tips and Tricks for Making the Attachments Tab Work for You

This section will cover Tips for setting up the Attachments Tab to make it useful for you. Setting up Columns, using groupings by field, and creating Views are a few.

Several Views in this area will be extremely useful for finding the documents you need to see. To see all of your Yearly Contract Reviews at the same time, to keep an eye on all of your BAA's, or to see all of your Final/Fully Executed contracts, you can create views to access these documents quickly and easily.

### Tip: Rearrange Your Columns

The first thing you will want to do will be to arrange your Columns so you see the data that is relevant to you.

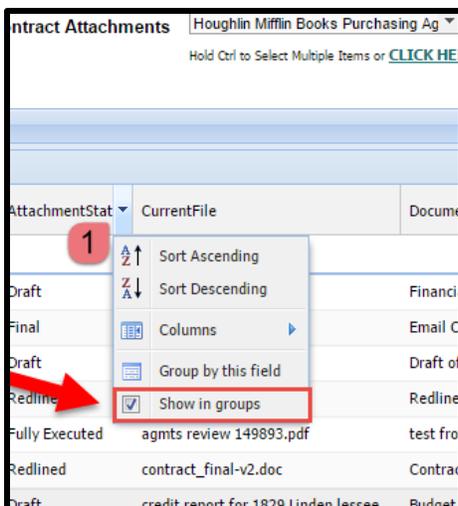


### Tip: Group Attachments by Category, Contract, or State

When navigating the Attachments Tab, try grouping by Category, Contract name, or by document State. This way you will see all of the documents in your system in a way that is both clear and useful. You can do this by choosing the Sort Indicator from any Column Heading and choosing *Group by this field*.

### Tip: Turn off Grouping for a cleaner looking grid

If you want a cleaner look in your grid to see your documents listed in the usual manner, simply choose the Sort Indicator from any of the column headings again and uncheck the option to *Show in groups*.



## Examples of Practical Uses of Views

Some Views that we feel may be useful for you include:

### All BAA's grouped by Category

To create this View, look for all Attachment Types that contain your wording for BAA's. Then, arrange your grid to show you the information you would like to see. In this example, we chose Attachment Category and Grouped by that field. When this is done, you will see the field name you selected showing in blue just below the Grid Preview. Do not forget to Save the View by giving it a name; click *Save and Run* when you are finished.

**Create/Modify Document(s) View**

Get Documents that match the following criteria:

AttachmentType contains BAA

Add Criteria  Include Archived

**Default Fields And Sequence**

Version Number	DocumentName	ContractName	AttachmentCategory	AttachmentType	AttachmentState	CurrentFile	Description
AttachmentCategory, [Total: 1]							

**Default Sort Order**

Document(s) Field: ----Select Fields----

Ascending Order (A-Z)  Descending Order (Z-A)

Document(s) Field	Sort Order	Delete
-------------------	------------	--------

Save this View  
\*View Name: BAA's  
 Share With Other Users

### Yearly Contract Reviews (by Category)

To create this View, follow the same formula for creating the BAA View, but change the criteria to find your Yearly Contract Reviews. You may also choose to Add Criteria to this report to find only the documents uploaded between certain date ranges. In this example, we are including any *Contract Reviews added in 2015*.

**Create/Modify Document(s) View**

Get Documents that match the following criteria:

AttachmentType contains Review

and AddedOn on or after 01/01/2015

and AddedOn on or before 12/31/2015

Add Criteria  Include Archived

**Default Fields And Sequence**

Version Number	DocumentName	ContractName	AttachmentCategory	AttachmentType	AttachmentState	Cur
AttachmentCategory, [Total: 1]						

## All Final or Signed (by State)

Another useful View may be for all of your Final and/or Signed Contracts grouped by State. Again, this would follow the same set up as the other Views mentioned here. However, you would instead define criteria that searches for all of your Final or Signed Contracts.

**Create/Modify Document(s) View**

Get Documents that match the following criteria:

AttachmentState contains Final

or AttachmentState contains Signed remove

Include Archived

**Default Fields And Sequence**

AttachmentType	Version Number	DocumentName	AttachmentState	AttachmentCategory	CurrentFile	Description	ContractName
AttachmentState, [Total: 1]							

**Default Sort Order**

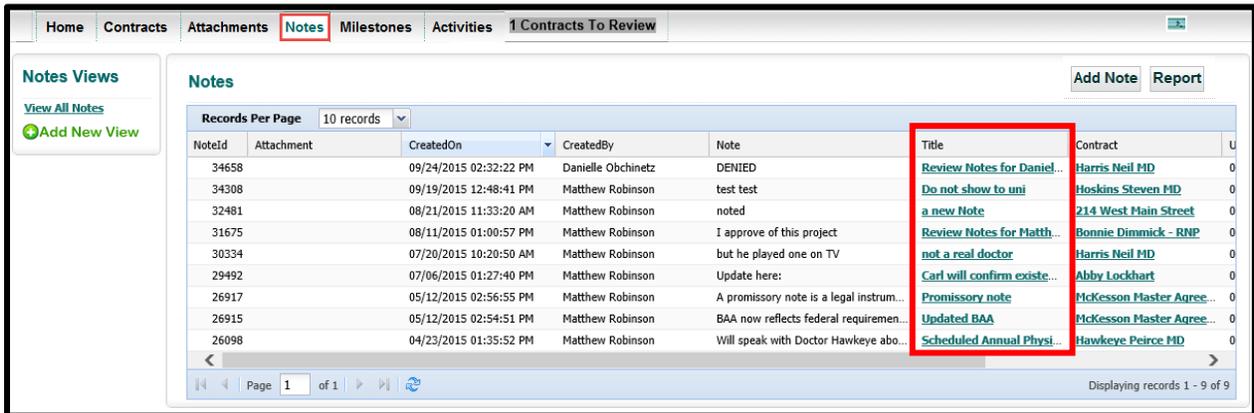
Document(s) Field:   Ascending Order (A-Z)  Descending Order (Z-A)

Document(s) Field	Sort Order	Delete
-------------------	------------	--------

In this example, we grouped the documents by *Attachment State* to show all of the Final, but not signed Contracts/ Agreements in one group and All of the signed ones in another group. If you have partially executed stages defined in your system as well, you may also want to include these in your View.

**Note:** Make sure to use **OR** instead of **AND** for this View.

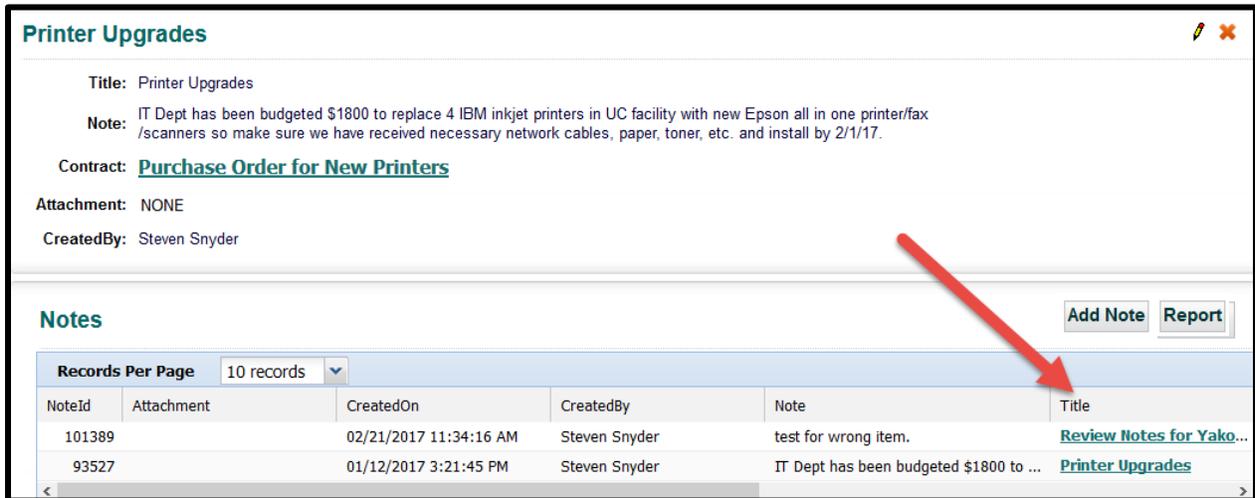
# The Enterprise Ribbon: Notes Tab



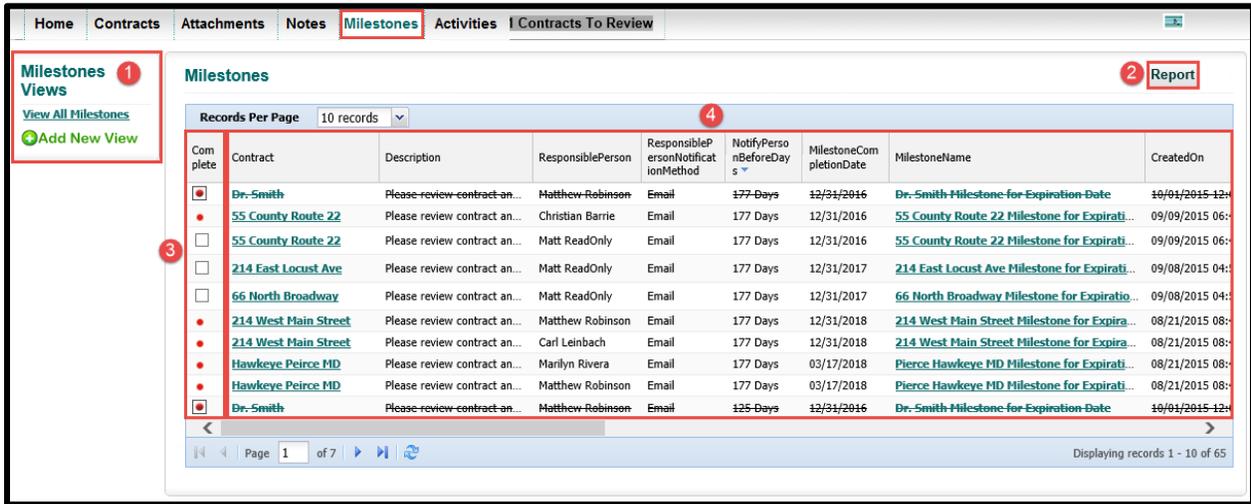
On the **Notes tab**, you can create or access Notes associated with your accessible contracts in the system.

The **Views** associated with the Notes section operate in the same manner as Views in other sections. The data available for criteria in those Views pertain exclusively to the Notes section. Examples of Views in the Notes section are “Notes to Me” or “Notes from Me” and would be set up exactly as would any other query in other sections. For instructions on setting up Views, see the chapter for [Creating a View](#).

Click on a **Title** to view the Note Details. From here you can access the Contract for review or changes, or you can run a **Report** to export the notes grid to an Excel csv file for further analysis and reporting.



# The Enterprise Ribbon: Milestones Tab



You can arrange and sort the column headings as you see fit - some of the columns shown here may not appear on your screen.

- 1. Milestones Views
- 2. Report Grid Button
- 3. Complete Icon/Checkbox
- 4. Milestones Grid

The **Milestones Tab** will show you past, present, and future Milestones associated with all available Contracts loaded into your system. You can add or modify an unlimited number of saved searches (Milestone Views). You can also export to Excel the contents of the grid in the Milestones tab or any **Milestones View** by simply clicking on the **Report** button (if the UCM Admins gave you Reporting Permissions).

Click on the *Add New View* link to create a new Milestone View and follow the directions by clicking on the link for [Creating a New View](#).

The *Complete* checkbox will only be available to you if you are a **Responsible Person** listed on the Milestone. Otherwise, the checkbox will show as a red dot (if incomplete) or as a boxed red dot (if completed). Completed milestones are also displayed as being ~~crossed out~~ line items. This is in case the *Complete* column is hidden or removed from the grid.

Complete	Contract ID	Milestone Id	Contract	Description	MilestoneName	MilestoneCompletionDate
<input type="checkbox"/>	418413	1976104	Purchase Order for Ne...	Review Vendor Contracts f...	Purchase Order for New Printers Mileston...	06/29/2017
<input checked="" type="checkbox"/>	418413	1976105	Purchase Order for Ne...	Review Vendor Contracts f...	Purchase Order for New Printers Mileston...	06/29/2017
<input type="checkbox"/>	439324	1971962	TEST for Wednesday	This is just a test.	Test for Wednesday Milestone-Test	03/08/2017
<input type="checkbox"/>	436406	1926116	Temporary Consultant	Testing for final production...	PRODUCTION Testing for Ticket-2317-AGAIN	02/22/2017
<input type="checkbox"/>	436406	1925930	Temporary Consultant	Annual Budget Reviews for...	Temporary Consultant Milestone for Expir...	03/30/2017
<input type="checkbox"/>	436406	1925931	Temporary Consultant	Annual Budget Reviews for...	Temporary Consultant Milestone for Expir...	03/30/2017
<input type="checkbox"/>	436406	1925932	Temporary Consultant	Annual Budget Reviews for...	Temporary Consultant Milestone for Expir...	03/30/2017
<input type="checkbox"/>	436406	1925933	Temporary Consultant	Annual Budget Reviews for...	Temporary Consultant Milestone for Expir...	03/30/2017
<input type="checkbox"/>	418471	1899329	General IT Contractor A...	Annual Budget Reviews for...	General IT Contractor Agreement Milesto...	12/28/2017
<input type="checkbox"/>	418471	1899330	General IT Contractor A...	Annual Budget Reviews for...	General IT Contractor Agreement Milesto...	12/28/2017

## The Enterprise Ribbon: Activities Tab

The Activities Tab will show you all future, present and past Activities in the system for the contracts you are able to see. You can create Views for the Activities in this area and save them into the area on the left of the Activities Grid. The setup and maintenance of these Views is similar to that of the Contract Views. You can add or modify an unlimited number of saved searches that contain criteria such as alterable sorting, page layouts, and the ability to filter on any combination of activity data. Remember, the Report button will export the data from the associated grid to an Excel readable file.

Each User will have the ability to show Activities assigned to them or created by them from the links provided above the grid of Activities.

Username: mattreadonly (R-R)  
Company: iContracts Healthcare  
UAP: Contract Management System

Home Contracts Attachments Notes Milestones **Activities** 1 Contracts To Review

Activities Views

- View All Activities
- 90 days upcoming
- MattReadOnly
- Notify on Completion
- Required Tasks
- uncompleted
- Add New View

Activities

Records Per Page 10 records

ActivityID	ActivityName	Complete	AssignedOthersName	AssignedToName	CompletedOn	Contract	CreatedByName
143154	<del>Review with Contract Admin</del>	<input type="checkbox"/>		Matt ReadOnly		214 West Main Street	Matthew Robinson
143153	<del>Read Documents</del>	<input type="checkbox"/>		Matt ReadOnly		55 County Route 22	Matthew Robinson
142901	<del>Activity for MattReadOnly</del>	<input type="checkbox"/>		Matt ReadOnly		214 West Main Street	Matthew Robinson
141406	Annual Contract Review	●		Matthew Robinson		Bonnie Dimmick - RNP	Matthew Robinson
141405	Annual Contract Review	●		Matthew Robinson		Bonnie Dimmick - RNP	Matthew Robinson
141404	Annual Contract Review	●		Matthew Robinson		Bonnie Dimmick - RNP	Matthew Robinson
141403	Annual Contract Review	●		Matthew Robinson		Bonnie Dimmick - RNP	Matthew Robinson
141402	Annual Contract Review	●		Matthew Robinson	08/25/2015 10:49:00 AM	Bonnie Dimmick - RNP	Matthew Robinson
141401	Annual Contract Review	●		Matthew Robinson	08/25/2015 10:48:54 AM	Bonnie Dimmick - RNP	Matthew Robinson
141400	Annual Contract Review	●		Matthew Robinson		Bonnie Dimmick - RNP	Matthew Robinson

Page 1 of 5

Displaying records 1 - 10 of 49

Note: You can arrange Column Headings to your liking – Some columns shown above may not be seen on your screen, depending on your permissions setup by UCM Administrators.

- **Activities Views** are found at the upper left of the screen.
- The **Activities Grid** is displayed in the center of the screen.
- Above the Activities Grid on the right side of the screen is the **Report button**.
- In the Activities Grid the column for *Complete* shows the **Activity Status Indicators**.
- Completed Activity Names are also displayed as being ~~crossed-out~~ items. This is in case the *Complete* column is hidden or removed from the grid.

## Completing an Activity

You can find Activities assigned to you five different ways. You may also receive email notifications regarding an Activity you have been assigned.

1. **The Activity Window Button** – Upon login, any Activities *assigned to you* that are due or overdue will appear in this pop-up window. This window can be retrieved again at any time by clicking on this button (nicknamed the “Amex button”). You can open the Activity directly from this link  to the **right** of the Activity ID or from this link  to the **right** of the Start Time.

Id	Subject	Due in
248618	TGIF!	3/3/2017 8:00:00 AM
248619	TGIF!	3/10/2017 8:00:00 AM

If you click on Dismiss or Dismiss All, the selected Activity/Activities will no longer appear in the future in this Notification Window.

To close this window, click on the X at the top right in the grey title bar, or click *Exit* at the bottom right.

2. Click on the *Assigned to you* link.
3. Create a *View* that identifies you as the assigned person.
4. The *Complete* checkbox (only activities assigned to you will be clickable, otherwise they show as a Red dot, the square outline indicates an activity that has been completed by someone else).
5. You are listed in the *Assigned to* Column. If completed, displayed as being ~~crossed out~~.

**After you locate the Activity you wish to Complete:**

1. Enter the Activity by clicking on the **Activity Name** in your Activity grid.

**Read Documents (ID: 143153)** Mark As Completed

Created By: Matthew Robinson  
Start Date: 8/25/2015 8:00:00 AM  
End Date: 8/25/2015 8:30:00 AM  
Assigned To: Matt ReadOnly

Assigned Other(s):  
Completed On: Not Yet Completed  
Contract: [55 County Route 22](#)  
Description:  
Required to Move Contract Status: No  
Associated Stage: --  
Recurring:   
Reminder: Not set  
Email Notification:   
Repeat Notification:   
Notify On Completion: --

**Activities** Report

All [Assigned To You](#) [Created By You](#)

ActivityID	ActivityName	Complete	AssignedOthersName	AssignedToName	CompletedOn	Contract	CreatedByName
143154	<a href="#">Review with Contract Admin</a>	<input type="checkbox"/>		Matt ReadOnly		<a href="#">214 West Main Street</a>	Matthew Robinson
143153	<a href="#">Read Documents</a>	<input type="checkbox"/>		Matt ReadOnly		<a href="#">55 County Route 22</a>	Matthew Robinson
142901	<a href="#">Activity for MattReadOnly</a>	<span style="color: red;">●</span>		Carl Leinbach		<a href="#">214 West Main Street</a>	Matthew Robinson

2. Click on the **Mark As Completed** button at the top right of the screen (this button only shows when the activity is assigned to you). *Of course, you performed the Activity prior to marking it as Completed?*

**Read Documents (ID: 143153)** Reactivate Activity

Created By: Matthew Robinson  
Start Date: 8/25/2015 8:00:00 AM  
End Date: 8/25/2015 8:30:00 AM  
Assigned To: Matt ReadOnly

Assigned Other(s):  
Completed On: 8/28/2015 10:03:45 AM  
Contract: [55 County Route 22](#)  
Description:  
Required to Move Contract Status: No  
Associated Stage: --  
Recurring:   
Reminder: Not set  
Email Notification:   
Repeat Notification:   
Notify On Completion: --

**Activities** Report

All [Assigned To You](#) [Created By You](#)

ActivityID	ActivityName	Complete	AssignedOthersName	AssignedToName	CompletedOn	Contract	CreatedByName
143154	<a href="#">Review with Contract Admin</a>	<input type="checkbox"/>		Matt ReadOnly		<a href="#">214 West Main Street</a>	Matthew Robinson
143153	<a href="#">Read Documents</a>	<span style="color: red;">●</span>		Matt ReadOnly		<a href="#">55 County Route 22</a>	Matthew Robinson
142901	<a href="#">Activity for MattReadOnly</a>	<input type="checkbox"/>		Carl Leinbach		<a href="#">214 West Main Street</a>	Matthew Robinson

3. **Optional** – to reactivate any activity assigned to you that you may have marked completed, click on the **Reactivate Activity** button. This will update the status in the Activities grid too.

# The Home Tab: Entering Contracts into UCM

There are two methods for creating new contracts within UCM for most Read-Only Users.

1. Templates
2. Library

## Using a Template



Template

FillAndDownload	TemplateName	ContractType	Description	CreatedOn	UpdatedOn	
<a href="#">Click to fill Fields</a>	BAA	Physician Agreements	NONE	03/12/2015	08/12/2015	Matt
<a href="#">Click to fill Fields</a>	Contract Request Form	Contract Request	Contract request worksheet	03/12/2015	11/13/2015	Matt
<a href="#">Click to fill Fields</a>	Our Standard Contract	Clinical	NONE	03/12/2015	03/12/2015	Prac
<a href="#">Click to fill Fields</a>	Contract Review Form	Purchasing	NONE	05/12/2015	09/08/2015	Matt
<a href="#">Click to fill Fields</a>	Physician Contract Request	Attachment Library	NONE	11/30/2015	11/30/2015	Matt
<a href="#">Click to fill Fields</a>	Vendor Evaluation	Service	NONE	12/14/2015	12/14/2015	Matt

Use **Template** to create a contract using predefined “boilerplate” documents loaded ahead of time, which are created by UCM System Administrators. When predefined Templates are used, upload accuracy is nearly flawless. BAA’s – Business Associated Agreements – are common template documents.

Click on the Template button, select a Template by clicking on the “[FillAndDownload](#)” link, and use the form construction tool to complete your document. This can be saved as either a Word or PDF document.

When you fill out a pre-made contract template, you can either create a new container, add it to a pre-existing contract container, or just send it to your desktop as a .doc or .pdf file.

### 1: Create new Contract Container

Selecting this method brings up the standard fields to fill out a new Contract Container (like Direct Entry) before creating the boilerplate document, as well as entering some of the Contract Container fields.

### 2: Add to existing Contract Container

Selecting this method attaches the template document to a pre-existing Contract Container in the system. Users are prompted for which *Contract Name* should be associated with this and will be asked if the template is the Primary Document so that you can define if it is the main document, such as a final version, or as a supporting document, such as a BAA or Exhibit Document where a main contract is already in place, as well as entering some of the Contract Container fields.

### 3: Do not associate with any Contract Container

Selecting this option will merely give the user the option of filling out values for fields and then downloading an editable .doc for further alteration, or a more “locked down” PDF to the desktop as a local file.

## Entering Defined Contract Fields

Information entered against the fields listed here will go directly into the Contract Template anywhere they had been previously set up and defined by the UCM System Administrator. Each field that has data entered will be filled out with that information anywhere it was defined at the setup. Any of the fields that have been checked off will automatically be entered on the Contract Summary with the information entered here when using either of the first two options at the top of the page. The *Contract Preview* area (Template Content) is a live editing area and can be altered on a document-by-document basis without the concern of overwriting the original template. In order to change the Template, an Administrator must go back to the Contract Templates Administration and make changes there for anything permanent.

1. After completing the Contract Container and Attachment information when using Options 1 or 2, click on the **Fill Values** button to enter the variable data fields that populate the document. Option 3 will not require filling out any information for the Contract Container.
2. Click on either the (Open in) **Word** or (Open in Acrobat) **PDF icon**, depending on how you would like to generate your document and place it in the *Attachments* section of the newly created Contract Container.
3. **Available only with Option 1 (Create new Contract Container):** After generating the document first, using the **Word** or **PDF** buttons, click on the third icon to navigate you to the *Summary Tab* of the new Contract and generate the default fields for the Contract Container.

*Note: You won't even see this icon if using the 2<sup>nd</sup> or 3<sup>rd</sup> Options to create contracts from Templates.*

The screenshot shows the 'Contract : Contract Request Form' interface. At the top, there are fields for 'Template Name', 'Contract Type', and 'Description'. Below these are radio buttons for 'Create new Contract Container', 'Add to existing Contract Container', and 'Do not associate with any Contract Container'. The 'Contract Name' is 'New Purchasing Agreement' and 'Contract Type' is 'Purchasing'. The 'Assign Workflow' section has 'Purchasing' selected, with a 'Preview' dropdown showing 'Draft', 'Budget Review', 'Legal Review', and 'Internal Signature'. 'Initial Workflow Stage' is 'Draft'. 'Contract Description' is 'Purchase of new items for this organization'. 'Owner' is 'Matthew Robinson'. 'Responsible Parties' includes 'Carl Leinbach', 'Selected Seconds', and 'Selected Tertiary'. 'Folder Name' is 'UCM/UCM Health/Contract Management System/Procurement'. 'Document Title' is 'CRF', 'Document Category' is 'Contract Request Form', and 'Document State' is 'Final'. 'Primary Document' is 'CRF' and 'Document Description' is 'CRF'. Below this is a section for 'Related To' with dropdowns for 'Related To is Achieved?', 'What Contract Type?', and 'Which Contract?'. A red circle '1' is next to the 'Fill values' button. The 'Fill values' section has a 'Check / Uncheck All Fields' button and a 'Reupdate Data in Container' button. It contains a table of fields with checkboxes: 'Purpose of Contract' (Purchase of new materials), 'Responsible Party' (Carl Leinbach), 'Vendor Name' (Healthy-R-U), 'Item or Product' (Granola), 'Annual Cost' (15000), 'Total Cost' (45000), 'New Contract' (checked), 'Amendment' (unchecked), 'Termination' (unchecked), 'Renewal' (unchecked), 'Effective Date' (3/15/2016), 'Contract Term' (3 Years), 'Termination Notice in Days' (90), and 'Other Information'. A red circle '2' is next to the 'Word' icon and a red circle '3' is next to the 'PDF' icon. The 'Template Content' section is titled 'Contract Request Form' and contains a disclaimer and a list of fields to be filled out: 'I. SCOPE AND PURPOSE OF PROPOSED CONTRACT', 'II. TYPE OF DOCUMENT REQUESTED', 'III. CONTRACT DATES', and 'IV. REVIEW AND APPROVAL'. The 'Reviewed By' field is 'Legal', 'Legal Approval' is 'Legal', 'Attorney' is 'Vincent Gambino', and 'Approver' is 'Tom Williams'.

## Adding Additional Documents

If you select Option 1, and after creating the document and clicking the button adjacent to create a new Container in the system, you will be directed to a page to add up to 10 additional documents and their category to the container.

*Note: This area is completely optional; you can simply click **Save** to move on.*

Once you do select **Save**, the documents upload to that Container with basic metadata attached. You may want to update the data surrounding the document in the *Attachments* Tab for the Container.

Click **Continue** at the bottom right to navigate directly to the container.

Contract ID: 353215  
Document Name: Contract Request Form.doc  
Document State: Final  
Folder: Contracts

1. File:	<input type="button" value="Choose File"/>	1- Contract_draft.doc
2. File:	<input type="button" value="Choose File"/>	BAA.pdf
3. File:	<input type="button" value="Choose File"/>	Financial Review.xlsx
4. File:	<input type="button" value="Choose File"/>	No file chosen
5. File:	<input type="button" value="Choose File"/>	No file chosen
6. File:	<input type="button" value="Choose File"/>	No file chosen
7. File:	<input type="button" value="Choose File"/>	No file chosen
8. File:	<input type="button" value="Choose File"/>	No file chosen
9. File:	<input type="button" value="Choose File"/>	No file chosen
10. File:	<input type="button" value="Choose File"/>	No file chosen

Successfully uploaded 3 Documents

Contract ID: 353215  
Document Name: Contract Request Form.doc  
Document State: Final  
Folder: Contracts

1. File:	<input type="button" value="Choose File"/>	No file chosen
2. File:	<input type="button" value="Choose File"/>	No file chosen
3. File:	<input type="button" value="Choose File"/>	No file chosen
4. File:	<input type="button" value="Choose File"/>	No file chosen
5. File:	<input type="button" value="Choose File"/>	No file chosen
6. File:	<input type="button" value="Choose File"/>	No file chosen
7. File:	<input type="button" value="Choose File"/>	No file chosen
8. File:	<input type="button" value="Choose File"/>	No file chosen
9. File:	<input type="button" value="Choose File"/>	No file chosen
10. File:	<input type="button" value="Choose File"/>	No file chosen

## Document Library

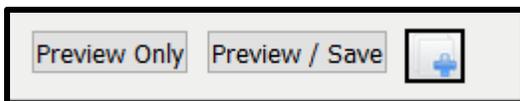


If the UCM System Administrators have allowed you access to the **Library**, this is an area in which you can find *Boilerplate Forms* for your organization. You can then download these directly from the Library and open them in their native format locally on your machine. An NDA – Non-Disclosure Agreement – is one example of a library document.

What makes these documents different than those found in Templates? These are mostly formatted Word documents loaded into UCM that can be used as “boilerplate” attachments for new contracts. The “**Fill and Download**” procedures are similar to those in [Using a Template](#). Make sure the column is displayed in the grid. You can also position this column wherever you prefer.

FillAndDownload	Library/ItemName	DocumentCategory	Description	OriginalFileName	CreatedDate	UpdatedDate
<a href="#">Click to fill Fields</a>	Malpractice Insurance Letters	Medical Malpractice Insura...	Boilerplate Letters Certifi...	<a href="#">Sample Service Agreem...</a>	04/05/2017	09/27/2017
<a href="#">Click to fill Fields</a>	Lease Agreements	Leases	Used for generating Lease...	<a href="#">lease agreement.docx</a>	10/03/2017	10/03/2017

Setting up a new Library item does have a different step **#2** from Templates, as shown in the image below. Instead of a Word or PDF icon, you click **Preview Only** or **Preview / Save** (the preferred choice).



Clicking on either button activates the **Aceoffix** application, which allows you to review the library document before uploading it into the Contract Container. Click **Save and Close** to exit Aceoffix.

When ready to attach the Library document to the Contract Container, click the blue **+** icon. Continue with the steps as shown in the *Adding Additional Documents* section of Using Templates.

# The Contract Ribbon: Inside the Contract Container

From within a Contract Container, you can see all of the data, documents, notifications, and notes that correspond to that particular agreement or contract. This section will guide you through the navigation and use of the functions available to you within a particular Contract.

Tabs displaying a **blue dot with a number** on the Contract Ribbon are “*Tab Indicator Dots*” which means that there is data (and how many) within those tabs. For the image below, there are five Attachments, one Notes, five Milestones, and two Activities but currently no Collaboration sessions. Email and History tabs do not display Tab Indicator Dots. As a Read-Only User, you cannot edit fields or add data.

## Summary Tab

**(418479) Physicians Agreement** 1

**608 Day(s) Until Expiration Date, on 12/31/2019** 2

**Description:** Physicians Agreement - This is a Master Contract that will be used for all current and future physic ... [Read More](#) 3

**Owner:** Al B. Seenya 4

**Contract Type:** Physicians 5

**Alert Configuration:**  Alert (2) Remaining 6

Current Stage/Change Stage: Active 9 for 84 days 10

Ribbon: Summary 3 Attachment(s) 1 Notes 5 Milestones 2 Activities

Show Contract Attributes  11 Expand All  12 13

Contract Name: Physicians Agreement A Review Status: 0 left to review, 1 Approved, 0 Rejected.

Related Contract: --- B

Notify on Stage Update: C

Responsible Parties: E Albert Administrator F Danielle Smi G Jane Doe 14

Primary Document: Physicians Agreement.docx 15

Common Contract Fields (Field Group) 16

Patient Insurance Plans (DropDown) 17

Termination Notice in Days (Numeric, 0) 18

Folder Name: iContracts Urgent Care\Contract Management System\Medical\Physicians 19 Contract Origin: Bulk Loader 20 ContractID: 418479 21

Created On: 01/12/2017 04:30:33 PM 22 Updated On: 03/05/2018 02:56:41 PM

Created By: Steven Snyder 23 Updated By: Steven Snyder 24

Fields and Field Groups are displayed below the Contract Attributes.

Common Contract Fields (Field Group) 14

Auto-Renew Contract:	<input type="checkbox"/>
BAA Required:	No
BAA Date:	
COI Required:	Yes
COI Expiration Date:	05/31/2021
Contract Value:	1,000,000
Effective Date:	06/01/2015
Expiration Date:	06/30/2018
Termination Notice in Days:	

<ol style="list-style-type: none"> <li>1. (Contract ID) Contract Name</li> <li>2. Countdown for Tracking X Date (if activated)</li> <li>3. Contract Description (click "... Read More" if needed)</li> <li>4. Contract Owner</li> <li>5. Contract Type</li> <li>6. Alert Configuration (if activated)</li> <li>7. Workflow Icon (changes to <b>A</b> if Contract Archived)</li> <li>8. Workflow Assignees Icon</li> <li>9. Workflow Stage Drop-Down</li> <li>10. Days in Current Stage</li> <li>11. Contract Attributes (see next column)</li> <li>12. Show/Hide Contract Attributes Checkbox</li> <li>13. Expand/Hide Fields &amp; Field Groups Checkbox</li> <li>14. Field Groups/Custom Fields</li> <li>15. Expand/Collapse Individual Fields/Groups</li> <li>16. Individual Field History Icon</li> <li>17. Container's Folder Name</li> <li>18. Created On Date and Time/Created By User</li> <li>19. Contract Origin (User, Bulk Loader, Copy, or Template)</li> <li>20. Updated On Date and Time/Updated By User</li> <li>21. Contract ID (same # as shown at top of screen)</li> <li>22. Archived On Date (only if Contract was Archived)</li> </ol>	<ol style="list-style-type: none"> <li>A. Contract Name</li> <li>B. Related Contract (Parent Contract Link)</li> <li>C. Notify on Stage Update (will display any users)</li> <li>D. Responsible Parties (P/S/T)</li> <li>E. Primary Party</li> <li>F. Secondary Party</li> <li>G. Tertiary Party</li> <li>H. Primary Document Link with Edit in Cloud link (not shown) as N/A for most Read-Only users</li> <li>J. Review Status (link disabled for Read-Only users)</li> <li>K. Reviewers Scorecard (click to display)</li> </ol>
--	--

The **Summary** data page within a Contract Container is where you will find all of the data surrounding the Contract. At the top of this screen, you will still see the *Enterprise Ribbon*, which is used for navigating through different areas of the system for **all** records. In this screen, you will see that there is another navigation ribbon; this one is called the **Contract Ribbon**. This ribbon allows you to navigate across the different areas of the particular Contract Container you are viewing.

The **Contract Ribbon** gives users in search of specific contracts the ability to quickly access information, evaluate potential actions, and effectively manage its near and long-term lifecycle and performance. Key information regarding the **Contract Container** will be available by clicking on the **Summary Tab**. Summary information includes the contract title or name, description, owner, contract type, and other pertinent *Contract Attribute* information created upon entry into the system, as shown in the picture above. Other tabs will indicate that they have content with a blue *Tab Indicator Dot*. These will only show if there is content in the Attachments, Notes, Related Contract, Collaboration, Milestone, or Activities Tabs. We also show users how many items are within each group.

**If activated by an admin, the Countdown for Tracking 'X' Date appears on all Contract Ribbon Tabs.**

The organization's custom fields, created by your UCM Administrators, are also available on this screen. They will always show directly below the *Contract Attributes*.

If you uncheck **Show Contract Attributes**, then only those items between the thin blue lines (items A-K) are suppressed. **Expand All** will control the display of all fields listed on the Summary Tab. Use the **+** to expand or **-** to collapse individual Field Groups (or stand-alone fields).

Below all Fields and Field Groups are the Folder Name, Created On and Created By information, as well as Contract Origin (User, Bulk Loader, Template, Library, or Copy), Update Information, Contract ID, and finally, the Archive Date displays for only those Contract Containers moved into the Archived stage.

## Summary Tab Items of Interest

### Workflow

In the upper right-hand corner of the Contract Summary tab is a DropDown containing *Workflow Stages* that can be assigned to a contract. The Workflow Stages are company-specific, as well as contract-type specific and are created by Administrators. The box on the Contract Container shows the current Stage the Contract is in at that time (e.g., Active). The two icons to the left are Workflow and Manage Assignees (locked for Read-Only Users). You can only change a stage. Click on this [Warning Messages](#) link for additional information on what happens if a Contract is in a Stage for a period longer than expected.



### Fields

In addition to the Contract Attributes, specific data points related to the contract (fields) are listed underneath the Contract Attributes. You can view specific fields directly on the Contract Summary tab, as long as you are granted the proper Permissions by your Administrators. By clicking the *Expand All* button, all of the added fields associated with the contract will expand to show the associated data. The user can also see all **History** associated with any field by clicking on its History Icon. 🗒

*Note: Fields are described in more detail in a later section.*

### Countdown for Tracking X Date

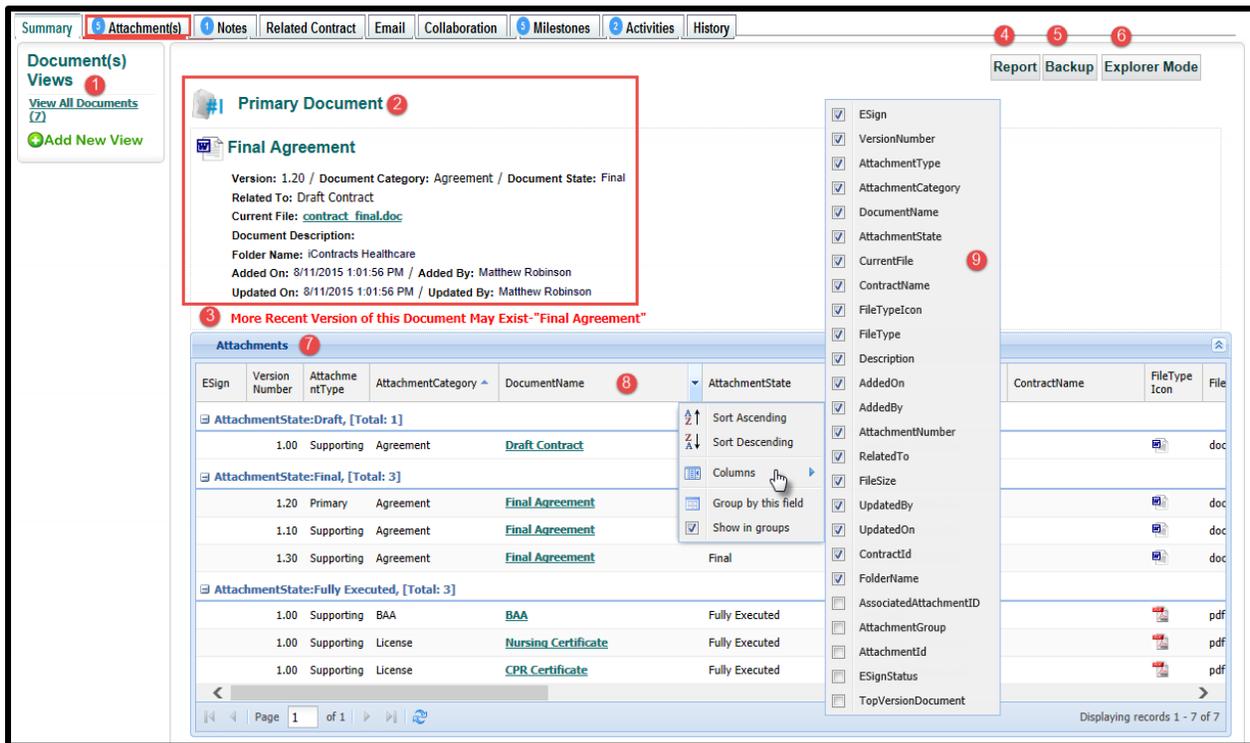
UCM can display a countdown on the contract *Summary Tab* in **red text**, based on a date field within that container. When the date passes, the message changes from “**x days until ...**” to “**x days after ...**”. Administrators define *which* Date field to use for all Summary Tab countdowns.

### Alerts

This specialized alert is set on a monthly cycle (every 1 month, 3 months, 6 months, 12 months, etc.) and for a preset number of times (0-999). This is different from Manual Milestones and Activities, which can repeat notifications daily until someone marks them as Complete. Alerts do not have daily reminders.

*Note:* This feature is usually locked for Read-Only Users, as explained in this section: Contract Alerts.

# The Contract Ribbon: Attachment(s) Tab



1. Document Views
2. Primary Document
3. More Recent Version Warning
4. Attachments Grid Report Button
5. Backup Documents Button
6. Explorer Mode Button (if enabled)
7. Attachments Grid
8. Attachments Column Headings
9. Column Heading Selections

Any number of attachments, including Word documents, Excel spreadsheets, PDFs, JPEGs, and other types, can be linked to a specific Contract. These documents are accessible through the Contract Attachment(s) tab.

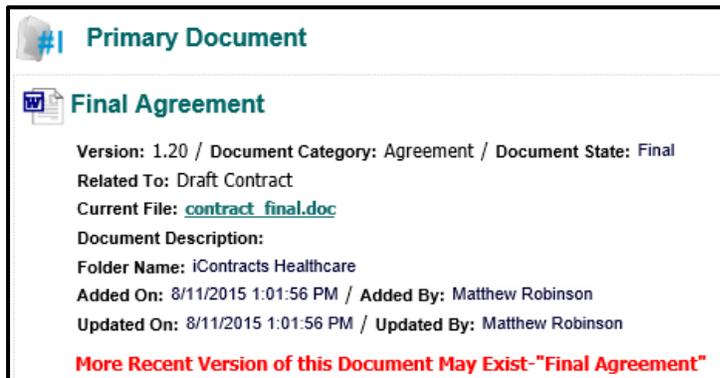
## Navigating the Attachment(s) Tab

The first thing you will want to do in this area is to arrange your grid so that the information you need to see is easily found and accessible. Version Number, Attachment Category, Attachment State, Document Name, and Document File are some of the most important data points. Having at least these showing in your grid will help you find your documents easily. Once you move your Grid to a desired orientation, they will not change again until you decide to change them. This setting will also carry into other Contract Containers' Attachments tabs.

You may notice that this area has the same functionality to *Show in Groups* and create Views that you have in the Attachments tab at the Enterprise level. However, these Views will only apply to the specific Contract Container from which they are created. For more on Views, see the chapter for [Creating a View](#).

## Primary Document

The Primary or main document listed for a Contract will show in a large area at the top-left of the Grid. This depends on your organization, but it is often used to point you towards the governing document for a Contract. For any document on the Attachments tab, you can download the document by clicking on the File name (depending on permissions). There is also an **“Edit In Cloud”** option, but only if your system has that feature enabled and you have access to that add-in (usually only Full Access and Administrator Users).

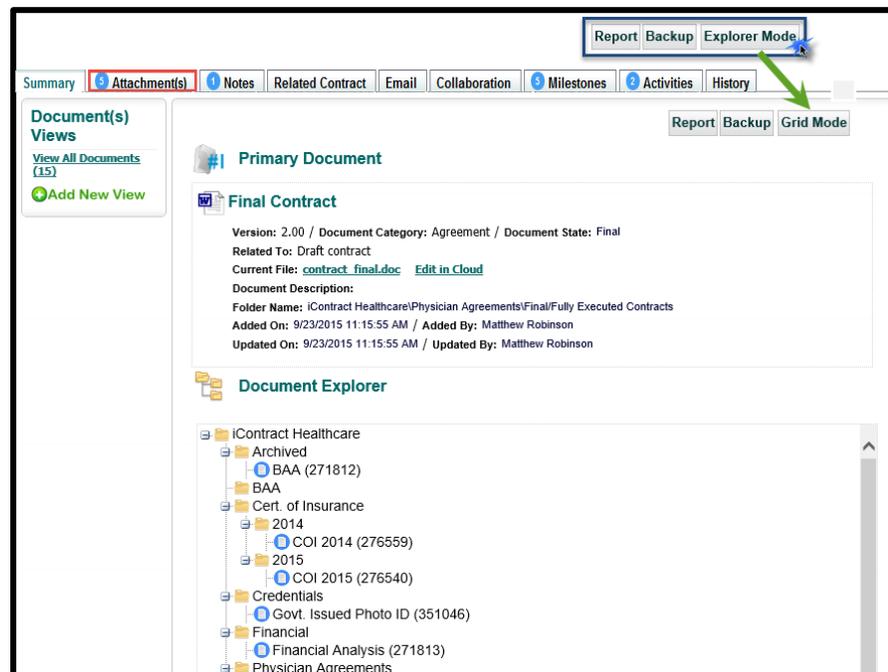


In this example, there is a warning letting users know that this may not be the most recent version of the document and that a document with a higher version number exists. Full Access or Admin Users can update another document to the Primary if necessary.

## Explorer Mode – An Optional Feature

This option is available to you only if your Administrators have decided that it is something they would like turned on. This option allows you to see your Attachments tab in a different way. This will replace the grid with a folder structure (similar to a Windows Explorer) that may be different for each Contract.

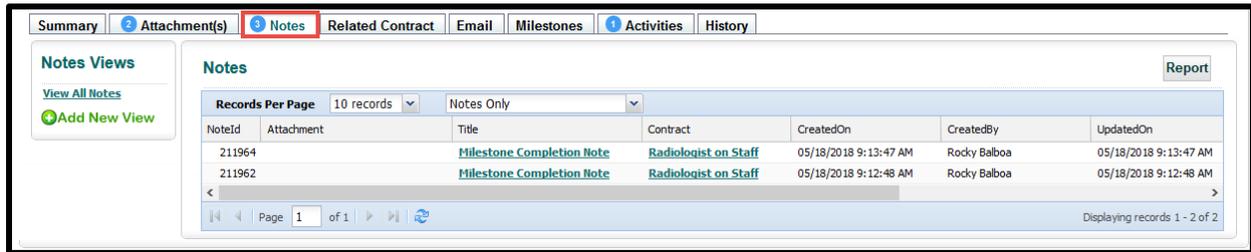
If this option is enabled, click on the **Explorer Mode** button at the top-right above the grid. Once you do so you will see the grid replaced and the *Explorer Mode* button now says *Grid Mode*, to toggle the modes back and forth.



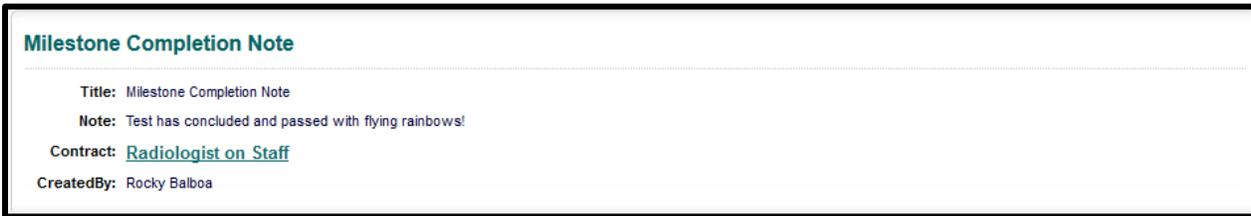
# The Contract Ribbon: Notes Tab

The **Notes tab** within the Contract Container is an area to keep Notes associated with a Contract Container. This is an area used for example, to keep track of collaborations about the contract in an organized and chronological manner. System Administrators and Full Access Users add notes with their access permissions set by default. If a document is attached to a Note, it will also appear within the *Attachments tab* with the same name as the Note Title.

The number in the blue dot is a total value, regardless of how many records are being displayed in the current grid (which is showing “Notes Only”). This means that there is either one Collaboration Note or a Workflow Approval Note that is not displayed in this grid.



You read any note by clicking on its **Title** in the Notes grid.



If the UCM Administrators have given the Read Only User access rights to *Edit a Note*, you can modify (or delete) the note by clicking on either   in the Note. Of course, if editing a note, make sure to click the *Save* button to keep your changes. If the edit pencil and X do not appear then this user does not have Edit rights.

## The Contract Ribbon: Related Contract Tab

You can look at relationships between Contract Containers in the system by navigating to the **Related Contract tab**. Here you can view a list of all of the contracts that are pointing to the currently displayed contract. There is no limit to how many contracts can point to another contract in a “parent-child” relationship.

When looking at a *Contract Summary tab*, users can specify a parent contract to which you want to relate the current contract. Each contract in the system can specify another contract to which it is related.

Contract ID	ContractName	ContractTypeName	StageName	Owner	Description	CreatedOn	UpdatedOn	Aut
443734	Dr. Benjamin Franklin	Physicians	Active	Steven Snyder	Used this Physician's CC to...	04/05/2017 02:37PM	08/02/2018 04:21PM	
567271	Dr. Benjamin Jeckyll-Hyde	Physicians	Active	Steven Snyder	Used this Physician's CC to...	07/19/2018 03:08PM	08/02/2018 04:22PM	

**(443734) Dr. Benjamin Franklin**  
151 Day(s) Until Expiration Date, on 12/31/2018  
Description: Used this Physician's CC to [redacted]  
Owner: Steven Snyder  
Contract Type: Physicians  
Alert Configuration:  Alert (999) Remaining

Summary | 8 Attachment(s) | 6 Notes | **Related Contract** | Email | 19 Milestones | 4 Activities | History

Show Contract Attributes  Expand All

Contract Name: Dr. Benjamin Franklin      Review Status: [2 left to review](#), [0 Approved](#), [0 Rejected](#)

**Related Contract:** Radiologist on Staff (542181)

Notify on Stage Update:

Responsible Parties: Albert Administrator Danielle Smith Jane Doe

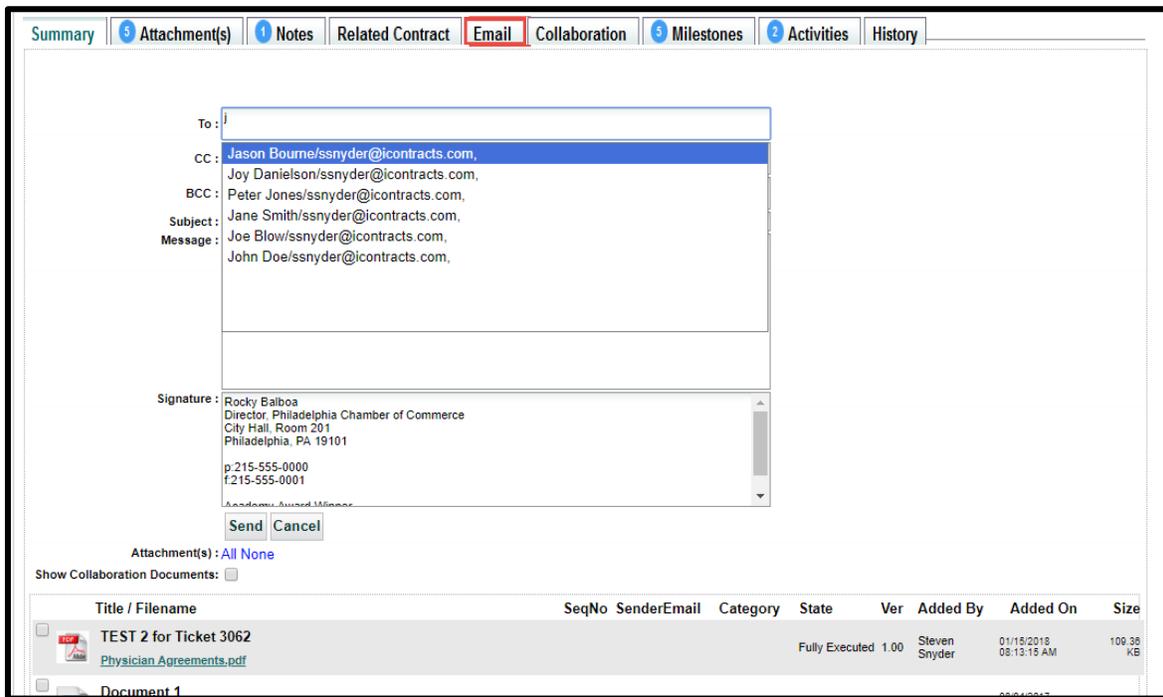
Primary Document: [Sample Medical Services Agreement.docx](#)

## The Contract Ribbon: Email Tab

The Contract **Email tab** allows users to communicate directly from within UCM. Email supports internal and external addresses To:, Cc:, and Bcc: -- in addition to Subject, and an area for the message to the recipients. Please note that your email address *may not* be included in the CC: as that option to “*Automatically CC Sender*” is set by your UCM Administrator.

Don't know the recipient's email address? Just type a letter, like “J” and all names/email addresses with a J will list for you. These users must be Active Users though.

All outgoing email messages are logged in the History Tab. Email replies, however, are not logged into UCM, but in the corporate email application (e.g., Outlook) you are using outside UCM.



While typing the message, the “*Insert Link to Container*” icon  appears, allowing you to insert a hyperlink to the Contract Container's **Summary Tab**. Only active UCM users will be able to log into the system and view this information.

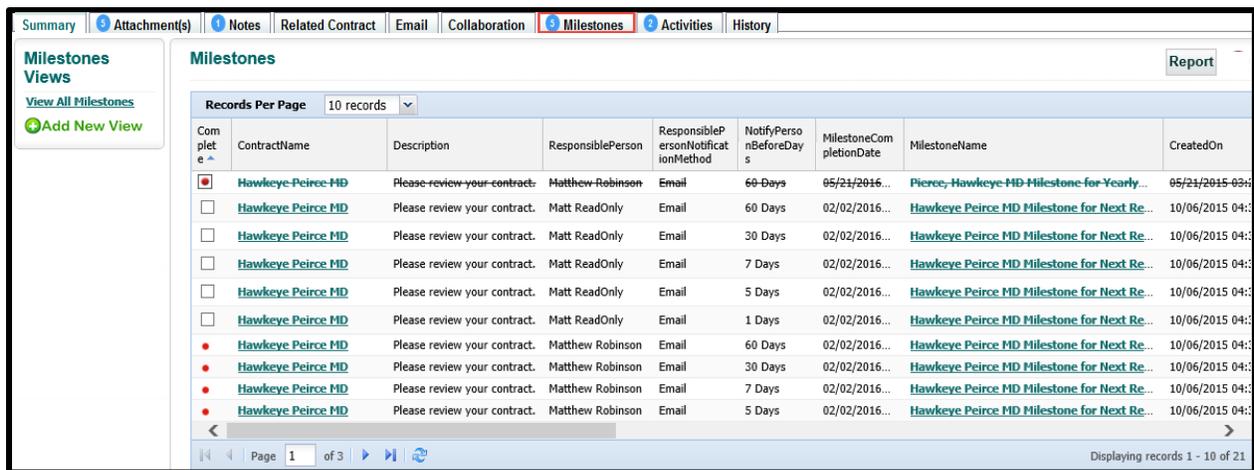
### Email Attachments

Your UCM Administrators set “*Default for Email Attachments*” to either **All** or **None**. Whichever way your company's setup has been configured, you can choose either All, None, or select/deselect individual attachments to include with your email.

# The Contract Ribbon: Milestones Tab

The **Milestones** associated with a Contract Container are notifications assigned by system administrators associated with a contract's *date field* (for example, Expiration Date), and number of days before (or after) an event, such as 90, 60, 30 days. You will receive email notifications at the intervals before, on, or after the set trigger date(s). The emails will include a link that takes you to the Milestone within the Contract Container.

If you are assigned to a Milestone, you can click on the *Milestone Name* in the grid and see the details of the Milestone, and upon task completion, click the **Mark As Completed** box in the Milestone. If you have editing rights set by UCM Administrators, you can also click on the pencil  to edit the Milestone.



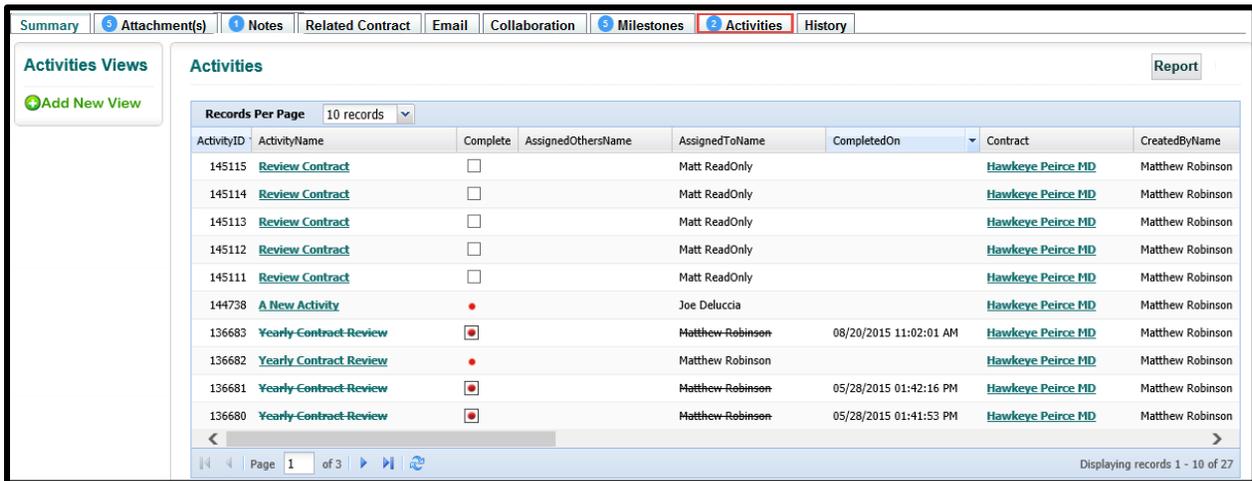
Completion	ContractName	Description	ResponsiblePerson	ResponsiblePersonNotificationMethod	NotifyPersonBeforeDays	MilestoneCompletionDate	MilestoneName	CreatedOn
<input checked="" type="checkbox"/>	Hawkeye-Peirce MD	Please review your contract.	Matthew Robinson	Email	60-Days	05/21/2016...	Pierce, Hawkeye MD Milestone for Yearly...	05/21/2016 09:...
<input type="checkbox"/>	Hawkeye Peirce MD	Please review your contract.	Matt ReadOnly	Email	60 Days	02/02/2016...	Hawkeye Peirce MD Milestone for Next Re...	10/06/2015 04:3...
<input type="checkbox"/>	Hawkeye Peirce MD	Please review your contract.	Matt ReadOnly	Email	30 Days	02/02/2016...	Hawkeye Peirce MD Milestone for Next Re...	10/06/2015 04:3...
<input type="checkbox"/>	Hawkeye Peirce MD	Please review your contract.	Matt ReadOnly	Email	7 Days	02/02/2016...	Hawkeye Peirce MD Milestone for Next Re...	10/06/2015 04:3...
<input type="checkbox"/>	Hawkeye Peirce MD	Please review your contract.	Matt ReadOnly	Email	5 Days	02/02/2016...	Hawkeye Peirce MD Milestone for Next Re...	10/06/2015 04:3...
<input type="checkbox"/>	Hawkeye Peirce MD	Please review your contract.	Matt ReadOnly	Email	1 Days	02/02/2016...	Hawkeye Peirce MD Milestone for Next Re...	10/06/2015 04:3...
<input checked="" type="checkbox"/>	Hawkeye Peirce MD	Please review your contract.	Matthew Robinson	Email	60 Days	02/02/2016...	Hawkeye Peirce MD Milestone for Next Re...	10/06/2015 04:3...
<input checked="" type="checkbox"/>	Hawkeye Peirce MD	Please review your contract.	Matthew Robinson	Email	30 Days	02/02/2016...	Hawkeye Peirce MD Milestone for Next Re...	10/06/2015 04:3...
<input checked="" type="checkbox"/>	Hawkeye Peirce MD	Please review your contract.	Matthew Robinson	Email	7 Days	02/02/2016...	Hawkeye Peirce MD Milestone for Next Re...	10/06/2015 04:3...
<input checked="" type="checkbox"/>	Hawkeye Peirce MD	Please review your contract.	Matthew Robinson	Email	5 Days	02/02/2016...	Hawkeye Peirce MD Milestone for Next Re...	10/06/2015 04:3...

In addition, you can click on the **Complete box** in the grid without first displaying the Milestone. If your UCM Administrators have activated the *"Milestone Completion Note Administration"*, they you will also be required to supply a Milestone Note based on rules set by your company (free form text and/or a drop-down selection).

You can create Milestone Views on this tab for individual Contracts. For information on creating Views, see the chapter for [Creating a View](#) by clicking on this link.

# The Contract Ribbon: Activities Tab

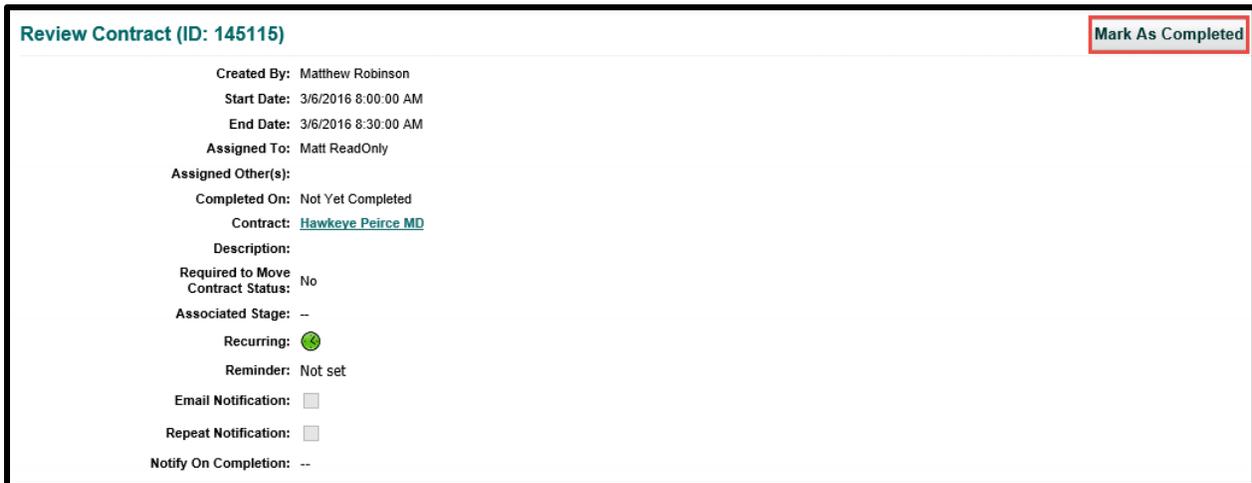
The Contract **Activities tab** provides you with a view of past, present, or future Activities associated with the Contract Container. You can add or modify an unlimited number of saved searches (Views) that contain criteria such as alterable sorting, page layouts, and the ability to filter on any combination of Activity data. Any view of Contract Activities also can be exported (to Excel by default) by simply clicking on the *Report* button. For more information in Views, please click on this link for [Creating a View](#).



The screenshot shows the 'Activities' tab in a software interface. At the top, there is a ribbon with tabs for Summary, Attachment(s), Notes, Related Contract, Email, Collaboration, Milestones, Activities (selected), and History. Below the ribbon, there is a sidebar with 'Activities Views' and an 'Add New View' button. The main area displays a table of activities with columns: ActivityID, ActivityName, Complete, AssignedOthersName, AssignedToName, CompletedOn, Contract, and CreatedBy/Name. The table contains several rows, including 'Review Contract' and 'Yearly Contract Review' activities. A 'Report' button is located in the top right corner of the table area. At the bottom, there is a pagination bar showing 'Page 1 of 3' and 'Displaying records 1 - 10 of 27'.

ActivityID	ActivityName	Complete	AssignedOthersName	AssignedToName	CompletedOn	Contract	CreatedBy/Name
145115	<a href="#">Review Contract</a>	<input type="checkbox"/>		Matt ReadOnly		<a href="#">Hawkeye Peirce MD</a>	Matthew Robinson
145114	<a href="#">Review Contract</a>	<input type="checkbox"/>		Matt ReadOnly		<a href="#">Hawkeye Peirce MD</a>	Matthew Robinson
145113	<a href="#">Review Contract</a>	<input type="checkbox"/>		Matt ReadOnly		<a href="#">Hawkeye Peirce MD</a>	Matthew Robinson
145112	<a href="#">Review Contract</a>	<input type="checkbox"/>		Matt ReadOnly		<a href="#">Hawkeye Peirce MD</a>	Matthew Robinson
145111	<a href="#">Review Contract</a>	<input type="checkbox"/>		Matt ReadOnly		<a href="#">Hawkeye Peirce MD</a>	Matthew Robinson
144738	<a href="#">A New Activity</a>	<input checked="" type="checkbox"/>		Joe Deluccia		<a href="#">Hawkeye Peirce MD</a>	Matthew Robinson
136683	<a href="#">Yearly Contract Review</a>	<input checked="" type="checkbox"/>		Matthew Robinson	08/20/2015 11:02:01 AM	<a href="#">Hawkeye Peirce MD</a>	Matthew Robinson
136682	<a href="#">Yearly Contract Review</a>	<input checked="" type="checkbox"/>		Matthew Robinson		<a href="#">Hawkeye Peirce MD</a>	Matthew Robinson
136681	<a href="#">Yearly Contract Review</a>	<input checked="" type="checkbox"/>		Matthew Robinson	05/28/2015 01:42:16 PM	<a href="#">Hawkeye Peirce MD</a>	Matthew Robinson
136680	<a href="#">Yearly Contract Review</a>	<input checked="" type="checkbox"/>		Matthew Robinson	05/28/2015 01:41:53 PM	<a href="#">Hawkeye Peirce MD</a>	Matthew Robinson

If an Activity has been assigned to you, you review the task, then you can mark it as completed either by clicking on the Activity name and clicking the **Mark As Completed** button in the top right of the Activity window or, if the checkbox for *Complete* is visible in the grid, simply check the box. The grid will update afterwards, showing completed Activities crossed out.



The screenshot shows the details for a specific activity titled 'Review Contract (ID: 145115)'. In the top right corner, there is a red-bordered button labeled 'Mark As Completed'. The main content area contains the following information:

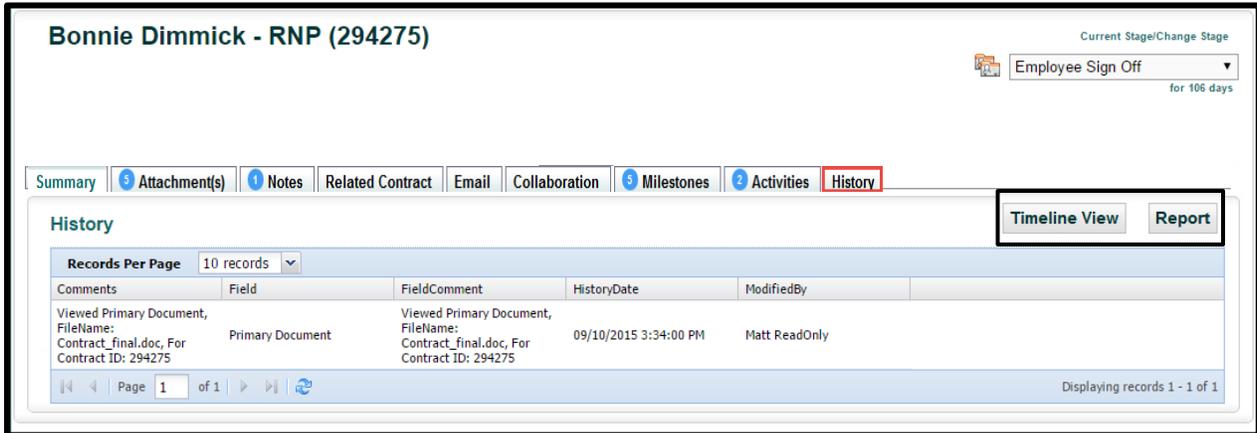
- Created By: Matthew Robinson
- Start Date: 3/6/2016 8:00:00 AM
- End Date: 3/6/2016 8:30:00 AM
- Assigned To: Matt ReadOnly
- Assigned Other(s):
- Completed On: Not Yet Completed
- Contract: [Hawkeye Peirce MD](#)
- Description:
- Required to Move: No
- Contract Status: No
- Associated Stage: --
- Recurring:
- Reminder: Not set
- Email Notification:
- Repeat Notification:
- Notify On Completion: --

You may also receive notifications by email for your Activities. These will provide a link that you can follow that will take you directly to this screen. If you are the "Assigned To" recipient, there may be a "Click to Complete Activity" button as well (if activated by you UCM Administrators). This button allows you to complete an assigned activity without first having to log into UCM. Your company decides if they want this feature available; you can still click on a link to direct you to the container within UCM. Follow [this link](#) to learn more about this feature.

# The Contract Ribbon: History Tab

The Contract **History tab** provides you with a view of all changes made to a contract since the contract was entered into the system. Read Only Users by default, do not have access to view other user's contract history. The blank History grid may show "No records to display".

You **cannot** configure which columns will display, only what order they will display (from left-to-right), as well as which column will sort your grid (History Date by default). History serves as an audit trail so that anyone with access can see when Contract Fields and Attachments were added, edited, and deleted.

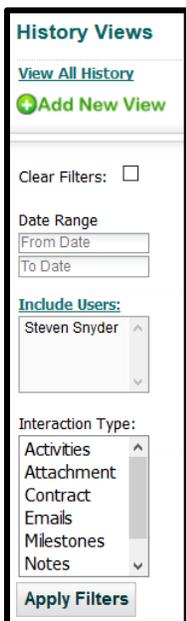


The History of a Contract Container cannot be modified, even by a Company's System Administrator. A full History of all changes can be seen only by an Administrator and must be requested from them.

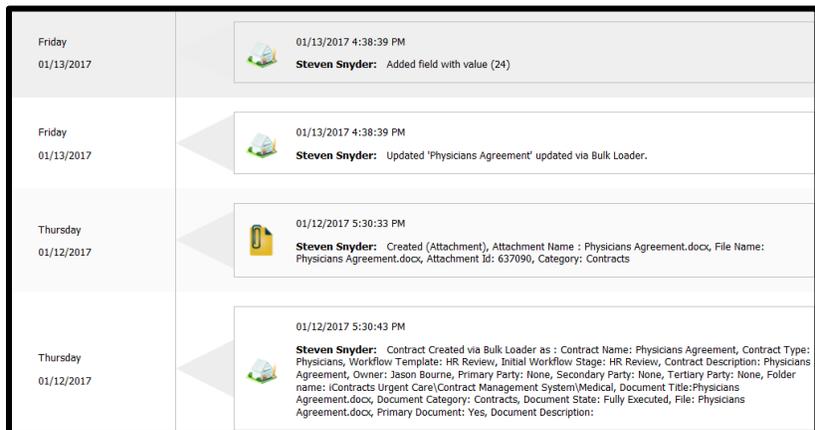
However, you can change **how** to view the contract history. The *History grid* can be changed into a *Timeline View*, which changes the grid into a graphic timeline (see image below). Click the *History View*

[History View](#) [Report](#) button to switch back to a grid view.

Click the *Report* button to export the history to an external application (such as Excel).



In addition, if you can view all history, you can filter the **History Views** with a unique set of filtering, only available to the History Tab. Since most Read Only users have access only to view their own history, History Filtering is very limited.



## A Closer Look at Contract Fields

Fields that were added on a one-by-one basis are entered, then displayed beneath the Contract Attributes in their own ribbons.

This screenshot shows four individual contract field ribbons, each with a folder icon, a title, a data type, and a value. Each ribbon has a small icon and a minus sign in the top right corner.

<b>Annual Cost</b> (Numeric, 2)	250,000.00
<b>Annual Salary</b> (Numeric, 2)	65,324.25
<b>Approver</b> (SingleLine)	Mark Tobinson
<b>Attorney</b> (DropDown)	Ally McBeal

However, most fields are contained within *Field Groups*. Increasing efficiency, these groups consolidate all of the fields into a compact area when closed, as shown below:

This screenshot shows two collapsed field group ribbons. Each ribbon has a folder icon, a title, and the text "(Field Group)". To the right of each ribbon are three icons: a pencil, a red X, and a plus sign.

<b>General</b> (Field Group)	[Pencil] [Red X] [+]
<b>Speaker Arrangements</b> (Field Group)	[Pencil] [Red X] [+]

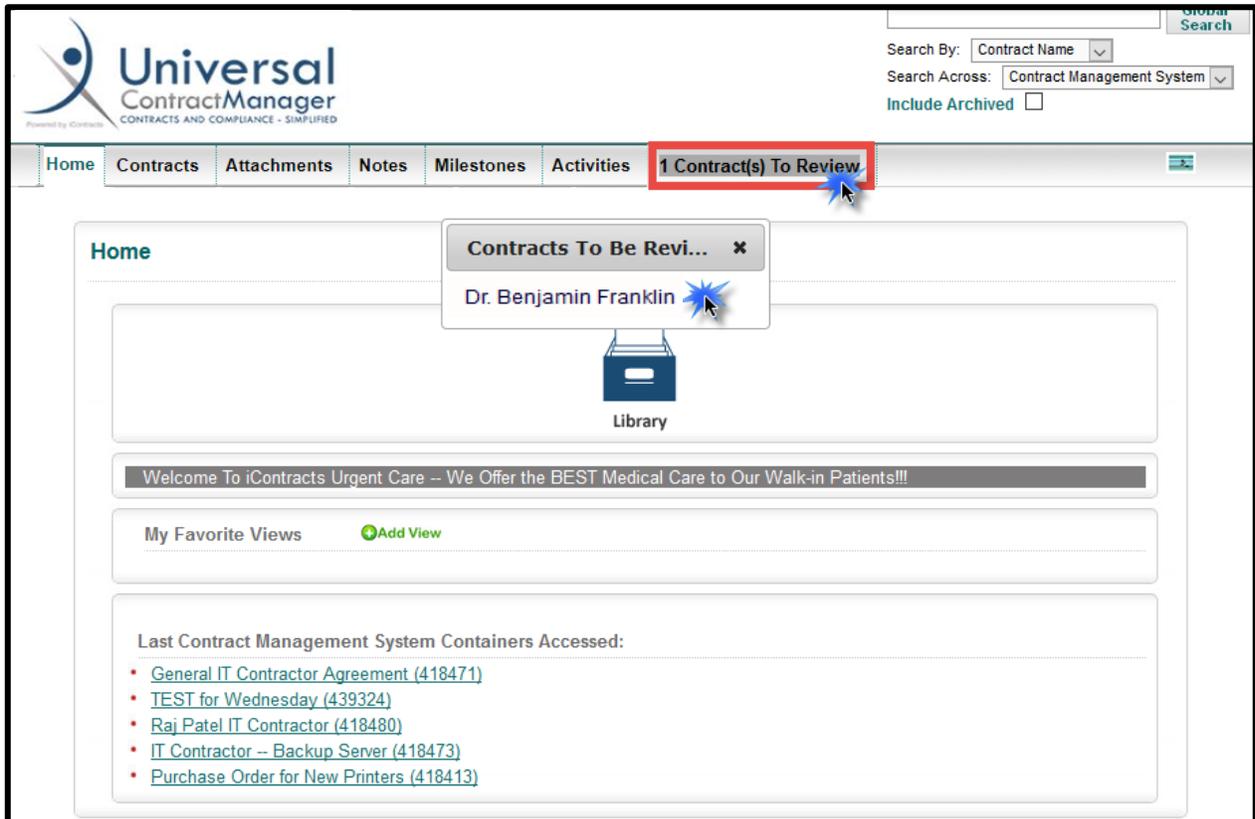
This screenshot shows the expanded view of the two field groups. The "General" group contains various contract details, and the "Speaker Arrangements" group contains event-specific information. Each field has a small icon in the right margin.

<b>General</b> (Field Group) [-]	
Received Date:	
Effective Date:	10/10/2015
Expiration Date:	10/17/2015
Contract Term:	1 Week
Total Cost:	60,000.00
Contract Value:	
Annual Cost:	250,000.00
BAA Required:	<input type="checkbox"/>
BAA Date:	
Department:	Economics
Auto-Renew:	<input type="checkbox"/>
COI Expiration Date:	
Responsible Dean:	Carl Leinbach
Attorney:	Ally McBeal
<b>Speaker Arrangements</b> (Field Group) [-]	
Venue:	Taj Mahal
Prep Time:	42 minutes
Event Time:	12:00 PM
Event Duration:	12:00 - 2:00
Speaker Requests:	Speaker would like personal branding on the front of stage
Hotel Arrangements:	Day's Inn Suite 210

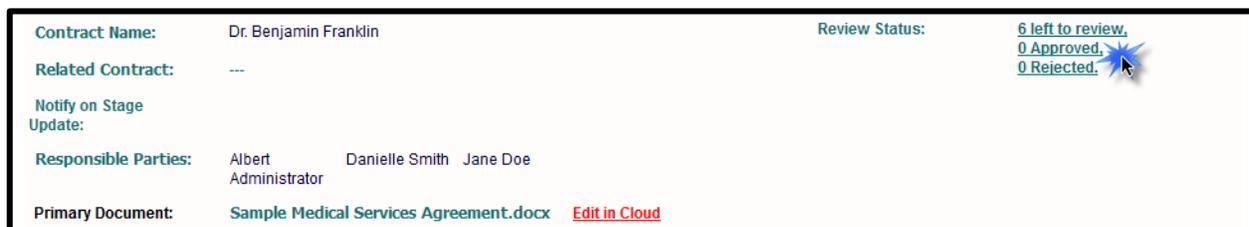
When you expand the Field Group, it displays all the field data contained therein (as shown above). You are able to expand or collapse fields and Field Groups by clicking on the + or - at the top right of the Field Group. You can also select the *Expand All* checkbox at the top center of the *Summary* page.

## Contract Reviewers

**Contract Review** allows collaboration among multiple users in the system. UCM will alert users if they have a contract or document to review by notification on the *Enterprise Ribbon* to the far right, when in the Home Screen. The user can see the name of the Contract Container(s) when they click on the notification, and then proceed to the review process from there, as seen on the following page. Reviewers are defined when a Contract Container is created and can also be defined in the Contract *Summary tab* by clicking on the *Review Status* link.



Clicking on the Contract Name in the pop-up review window that displays by clicking on the *Contract Review Notification Alert*, on the Enterprise Ribbon, as shown above, takes you to the Contract's *Summary Tab*. Reviewers can then click on the **Review Scoreboard** link in the *Contract Attributes* as shown below.



Choose either the **Approved** or **Rejected** button and then click **Save**. Enter your mandatory notes in the **Add Reviewer's Notes** screen. Click **Save Note**. Finally, click **Exit** to return to the *Summary Tab*.

Reviewer names	6	0	0
<a href="#">Steven Snyder</a>	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
<a href="#">Albert Administrator</a>	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
<a href="#">Mary Holman</a>	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
<a href="#">Test N.L. User</a>	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
<a href="#">Danielle Smith</a>	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected
<a href="#">Jane Doe</a>	<input checked="" type="radio"/> Not Reviewed	<input type="radio"/> Approved	<input type="radio"/> Rejected

**Steven Snyder**     Not Reviewed     Approved     Rejected

**SAVE**    **CANCEL**    **EXIT**

**Step 2: Add Reviewer's Notes (Required)**

Note:

**SAVE NOTE**

You must enter and Save a Note to complete the Review.

The system records the choice and notifies those users as defined by the Administrator. Read-Only Users only record their own choice in the Review Process.

## Appendix A - Default Contract Fields (Attributes)

The lists of fields shown below are system-provided Contract Attributes, indicated by the \*. These are available for query purposes and always appear at the top of any list of available fields for reporting.

- **Contract ID**  
A Unique Number assigned by UCM that is associated with a Contract Container. This unique number is listed in parenthesis in front of the Contract Name when inside the Contract Container.
  - **Contract Name**  
The name given for a Contract Container.
  - **Contract Origin**  
How the Contract was entered into the system. The choices are Bulk Loader, User, and Template.
  - **Contract Type Name**  
The type of Contract as provided by the User.
  - **Created By**  
The User that created the Contract.
  - **Created On**  
The date the Contract was entered into the system.
  - **Days in Current Stage**  
The number of days since the Contract entered its current Workflow Stage. This number is displayed inside the Contract Container under the current Workflow Stage in the Workflow Stage indicator drop-down.
  - **Description**  
Extra information detailing the nature of a Contract Container in the system.
  - **Ext Contract Reference ID**  
A reference to a record located in another external system used for linking the two systems together. (This functionality that is not standard and requires a custom API from our developers.)
  - **Folder Name**  
The name of the folder in which the Contract resides for security and access permissions.
  - **Notify on Review Completion**  
The User Specified for notification when a Review has been completed by all Users specified for the Review.
- \*Contracts Attributes
    - Contract ID
    - ContractName
    - ContractOrigin
    - ContractTypeName
    - CreatedBy
    - CreatedOn
    - DaysInCurrStage
    - Description
    - ExtContractRefID
    - FolderName
    - NotifyOnReviewCompletion
    - NotifyOnReviewStatusChange
    - Owner
    - PrimaryDocument
    - PrimaryParty
    - RelatedToContract
    - RelatedToContractID
    - Reviewers
    - ReviewsSet
    - SecondaryParty
    - StageName
    - StageNotify
    - StageNotifyNames
    - TertiaryParty
    - UpdatedBy
    - UpdatedOn
    - Workflow

- **Notify on Review Status Change**  
The User specified for notification after all the Reviews have been completed for a Contract.
- **Owner**  
The User responsible for the Contract in the System.
- **Primary Document**  
The attachment designated to be the main document, or perhaps the latest version of a document.
- **Primary Party**  
An area for entering a user in addition to the Owner that may be responsible for the Contract.
- **Related Contract**  
Lists the Contract specified that the current Contract is Related to.
- **Related Contract ID**  
Lists the Contract ID specified that the current Contract is Related to.
- **Reviewers**  
Lists the Users specified in the Review module to Review a Contract.
- **Reviews Set**  
Denotes if a Contract has been assigned for a Review.
- **Secondary Party**  
Another area to designate a responsible user.
- **Stage Name**  
Lists the name of the current Workflow Stage for the Contract.
- **Stage Notify**  
Denotes if a User has been specified to receive notifications for a change in the Workflow Status of a Contract.
- **Stage Notify Names**  
The Users specified to be notified when the Workflow Status of a Contract has changed.
- **Tertiary Party**  
Another area to designate a responsible user.
- **Updated By**  
Lists the last User that modified the Contract.
- **Updated On**  
The date the most recent changes to a Contract Container were made.
- **Workflow**  
The name of the assigned Workflow Template for a Contract.

## Attributes Not Shown

- **Archive**  
Contract Container(s) moved into an “Inactive” Stage but not deleted from the system.
- **Archived On**  
Archive Date for when Contract Container(s) moved into this “Inactive” Stage.

**The following Attributes are displayed only if “Alerts” are activated for your company:**

- **Alert-Configured Fields**  
A [View](#) hyperlink that displays any Configured Fields appearing in the Alert email notifications.
- **Alert-Description**  
Text or instructions entered into an Alert Configuration setup.
- **Alert-End After Y Times**  
The number of months this Alert repeat.
- **Alert-Notification Date**  
The date an Alert is triggered.
- **Alert-Notify Days in Advance**  
The number of days prior to the next notification date.
- **Alert-Notify Users**  
Users set to be notified when the Alert is triggered.
- **Alert-Recurs Every X Months**  
The number of months this Alert is set to repeat.

## Appendix B - Glossary of Terms

<b>Term</b>	<b>Definition</b>
<b>Activity</b>	Tasks assigned to different users in the system.
<b>Checkbox (Field Type)</b>	A data field in the form of a checkable box.
<b>Contract Permissions</b>	Definition of the ability of a particular role or user to view or edit any information related to a specific type of contract or individual contract.
<b>Contract Ribbon (Bar)</b>	The navigation ribbon displaying available functions for a selected contract.
<b>Contract Templates</b>	Predefined electronic boilerplate documents that serve as a starting point for creating new contracts/documents.
<b>Contract Types</b>	Descriptive categorizations of contracts used to label and identify similar types of contracts. Contract Types allow you to assign default Fields, Workflows, and Milestones to appear.
<b>Contract Inventory</b>	Catalog of all electronic contract documents.
<b>CRM</b>	Customer Relationship Management
<b>Date (Field Type)</b>	An area in an electronic form or database that contains date information.
<b>Date Calc (Field Type)</b>	A Date field that is generate through a calculation based on other dates captured.
<b>Drop-Down (Field Type)</b>	Input fields that have a pre-defined list of acceptable values for the user to select.
<b>EMR</b>	Electronic Medical Records
<b>Enterprise Ribbon (Bar)</b>	The navigation ribbon or “bar” displaying available functions in UCM across all or a subset of all contracts to which a user has access based on their permissions.
<b>ERP</b>	Enterprise Resource Planning
<b>Expiring Contracts</b>	Contracts that are due to expire based on defined date (e. g. Expiration Date) or other criteria.
<b>External Contract</b>	A contract that was originated by an entity’s vendor or trading partner rather than internally.
<b>Field</b>	An area for data input, storage, and retrieval. Fields allow you to create searches for tracking and reporting.
<b>Field Categories</b>	Descriptive categorizations of fields used to label and identify similar groupings of fields for organizational purposes.

<b>Term</b>	<b>Definition</b>
<b>Field Groups</b>	A logical grouping of input fields in the Contract Summary tab of UCM. Field Groups minimize the effort and space required for entering data as they can be assigned to specific Contract Types, making it easier to modify and manage your Fields.
<b>Folder Permissions</b>	A set of criteria that allow a user to modify or view contracts or documents contained in a specific folder.
<b>Global Search</b>	A search that occurs over the entire set of Contracts, documents, or object areas in UCM.
<b>History/Audit Trail</b>	A record containing the date, time, user, and other information relevant to any change made in UCM, these records are un-editable and cannot be deleted.
<b>Interface</b>	The viewing area of a computer program used for the purpose of viewing and inputting data.
<b>Internal Contract</b>	A contract that was originated internally (within a company) as the starting point for an agreement with a vendor or trading partner Templates are often used for this purpose in UCM.
<b>Legacy System</b>	Software systems that are previously used by a company/entity.
<b>Milestones</b>	Date driven benchmarks that are generally associated with a contract or other activity related to a contact that would be beneficial to track. Approaching milestones are often communicated to interested personnel via email or text message.
<b>Multi-Line (Field Type)</b>	A data field that is used to capture long strings of text over 80 characters. Can be sentences, paragraphs, or entire pages of text.
<b>Multi-Select (Field Type)</b>	A data field used for selecting one or more values from a list.
<b>Notes</b>	An organized area for notations pertaining to each Contract Container.
<b>Numeric (Field Type)</b>	A field that contains numeric values of a prescribed size, including decimal precision.
<b>Numeric-Calc (Field Type)</b>	A Numeric field whose value is determined by a mathematical equation/calculation rather than the input of a specific value.
<b>OCR</b>	Optical Character Recognition, OCR examines a scanned document, evaluates the letters and words in the document and converts them to words that can then be saved for searching in UCM.
<b>Owner</b>	The person (user) responsible for a Contract Container.

<b>Term</b>	<b>Definition</b>
<b>Parent-Child Relationship</b>	The linking of a record or object with another record or object, in UCM, any Contract may be associated with its “parent”, which enables users to easily find other Contracts related to the same parent and vice-versa.
<b>Password</b>	The input area on the login screen for a unique user’s “key”.
<b>Permissions</b>	Role or user-based security settings providing access or denial of access to view, modify, or delete contracts, documents, or other information.
<b>Policies</b>	Rules within an organization.
<b>Primary Document</b>	The main document for a Contract Container, designated by Full-Access or Admin Users.
<b>Records</b>	One or more rows of data (some combination of fields) within a database.
<b>Related Contract</b>	A record in the system that has been linked to another, often used for parent-child contract.
<b>Reports</b>	Specific contract, activity, milestone, performance, history or other information contained within UCM that is generated in report form and immediately available in Excel accessible format for eligible users.
<b>Responsible Parties</b>	An area for designating up to three additional users as responsible for a Contract (in addition to the Owner).
<b>Role Models</b>	Security profile/permissions that is associated with a “Role” rather than an individual. Individual users may then be associated with a Role, providing the benefit of then being able to modify permissions for a role to affect the permissions of many users rather than having to maintain permissions for each user.
<b>Single-Line (Field Type)</b>	A field that can contain up to 80 characters, used for short pieces of text to be entered and tracked.
<b>Stages</b>	The steps that must be followed to progress through a Workflow in UCM.
<b>States</b>	A status that an attached document is in, such as Draft, Final, or Signed.
<b>Template</b>	An area for filling out web-forms that can be used to create a document on a new Contract Container or a stand-alone document (depending on permissions).
<b>Train-the-Trainer</b>	The approach we take at iContracts in which we train and aid the main system administrator(s) in the setup, implementation, and use of our system, and they, in turn, train their users.

<b>Term</b>	<b>Definition</b>
<b>UCM</b>	Universal Contract Manager
<b>Username</b>	The administrator-assigned login identity operators of the UCM system.
<b>Views</b>	Saved, filtered, sorted ways in which to examine and evaluate Contract, Milestone, Activity, and other information in UCM. These are also referred to as Ad-Hoc reports or searches.
<b>Workflow</b>	The ordered process and steps of a Workflow used to manage the lifecycle of a contract.

## Appendix C – Additional Help for New Features/Enhancements

The UCM System continues to undergo enhancements and updates throughout the year. As of this document's release, here are some of the newest features that you may find useful. New enhancements are announced via email to the UCM Administrators all year long. Supporting documentation is usually provided to supplement this manual too. Not all enhancements are available to all UCM Users if either disabled by their Administrators, or not purchased by your company.

### Contract Alerts

Contract Alerts are for those companies that may need to set **Notifications** for Evergreen or Auto-Renewing contracts, or any contracts with unique terms that may not be suited for Milestones or Activities.

This specialized alert is set on a monthly cycle (every 1 month, 3 months, 6 months, 12 months, etc.) and for a preset number of times (0-999). This is different from Manual Milestones and Activities, which can repeat notifications daily until someone marks them as Complete. Alerts do not have daily reminders.

#### The Countdown on the Contract Container

<b>Purchasing Agreement with Staples for Office Supplies (329452)</b>	
Description:	This is for all locations for 2015-2016 -- Any Office Supplies under our contract
Owner:	Tom Williams
Contract Type:	*Purchasing
Alert Configuration:	<input type="checkbox"/> Alert (12) Remaining

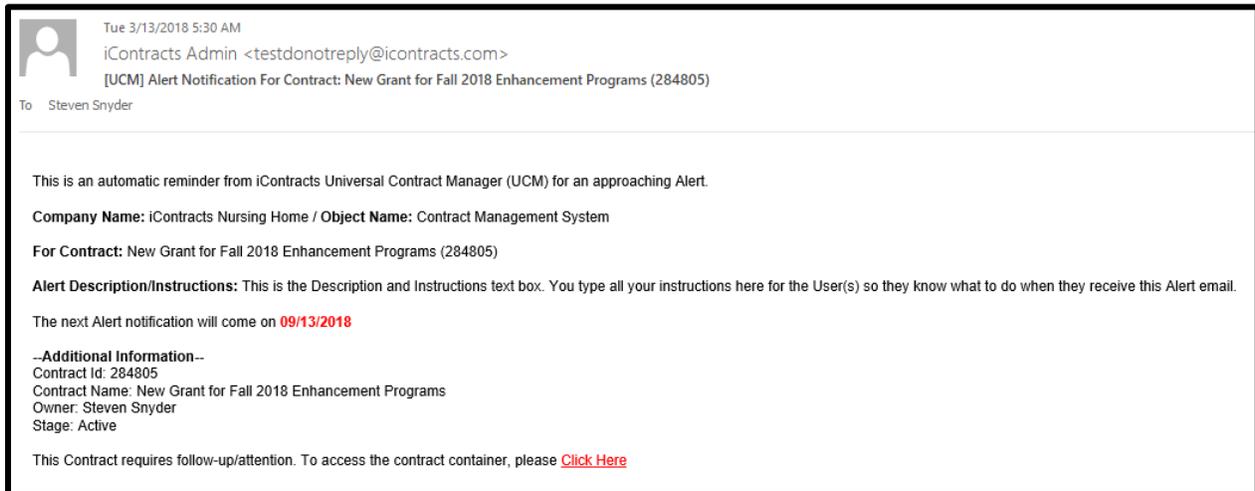
Read-Only Users can view Alerts only. The *Summary Tab* keeps a running counter of Alerts Remaining.

### Receiving the Alert

When the Alert is triggered, users get an email. The **Subject** line notifies the user(s) that this is an *Alert Notification for Contract: X*. This should help distinguish this alert from other UCM emails, such as Stage movement, Milestones, or Activities. In addition, there are **Alert Description/Instructions** and **Additional Information** fields to help users understand what needs to be done when they receive alerts.

The Alert counter will then be reduced by one if it repeats. Repeating Alerts display in the email: *“The next Alert notification will come on mm/dd/yyyy”*.

Individual or final alerts will instead have the message: *“This is currently the last Alert notification for this container.”*



## Setting the “Last Contract Management System Containers Accessed” on the UCM Home Page

To customize the Read Only User’s number of Last Accessed Container Size, click on the **Profile/Help** link.

Once you *Select* your Container Size, click the **Save** button. Your user default is now locked in, regardless of whatever the company default has for a value. You can change your user setting at any time, your selection will always take precedent over the company default selection.

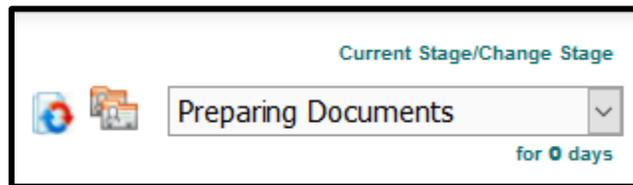
The screenshot shows two sections of a user interface. The top section is titled "AutoCreate Milestone settings" and contains an unchecked checkbox for "AutoCreate Milestone:" and two buttons: "Save" and "Cancel". The bottom section is titled "Last Container Accessed Size Setting" (highlighted with a red box) and contains a dropdown menu for "Last Accessed Container Size:" with a "Select" button. The dropdown menu is open, showing options: "Select", "5", "10" (highlighted in blue), "15", "20", "25", and "30". Below the dropdown are "Save" and "Cancel" buttons. A mouse cursor is clicking the "Save" button. A green arrow points from the "Save" button to the "Last Container Accessed Size Setting" header. Below this section is a "Change Password" section with "Password:" and "Confirm Password:" fields, each with a "Save" and "Cancel" button.

## Concurrent Stage Reviews

UCM has introduced a new enhancement that allows Assignees to be “linked” into a **Review Process** that locks a Workflow Stage until all of the assignees have approved this stage. Once all Assignees have approved the review, the Workflow automatically advances to the next stage in the progression.

### Using Concurrent Stage Approvals

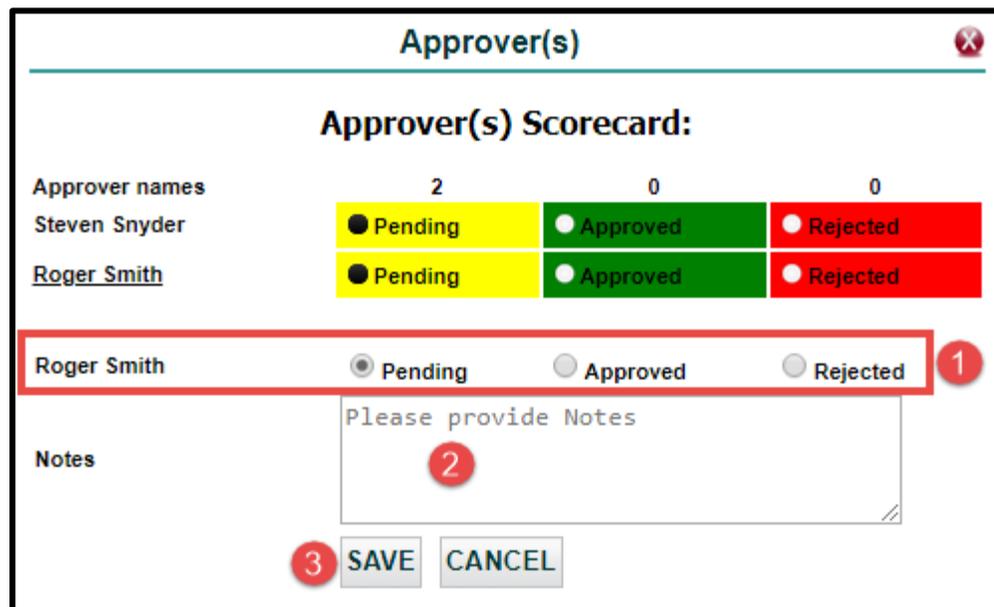
**Workflow Stages** are advanced from one stage to the next as you would within any Contract Container. Any stage that has been setup for “Set Approvals” will display a new icon in front of the Current Stage drop-down. *Image 1 below shows a Full- Access User getting ready to move a Stage forward.*



*Image 2 below shows this Read-Only User with the Stage Review icon.*



Approvers (who also receive an email with a link directly to the Approvers box) will click on this icon to display the **Approver(s) Scorecard**.

A screenshot of the 'Approver(s) Scorecard' interface. It shows a table of approvers and their status. The 'Roger Smith' row is highlighted with a red box. Below the table is a 'Notes' field and 'SAVE' and 'CANCEL' buttons. Red circles with numbers 1, 2, and 3 point to the 'Roger Smith' row, the 'Notes' field, and the 'SAVE' button respectively.

Approver names	2	0	0
Steven Snyder	<input checked="" type="radio"/> Pending	<input type="radio"/> Approved	<input type="radio"/> Rejected
<u>Roger Smith</u>	<input checked="" type="radio"/> Pending	<input type="radio"/> Approved	<input type="radio"/> Rejected

Roger Smith  Pending  Approved  Rejected 1

Notes: Please provide Notes 2

3 SAVE CANCEL

The Review Process is as follows:

1. AFTER reviewing the Contract, you either click “**Approved**” or “**Rejected**” (as you can see from the image, the scorecard begins with *Pending*).
2. Enter your **Notes** in the provided text box. This is a free-form text box so type away.
3. Click the **Save** button.  
Three things happen next: an email is generated to all approvers with your results, the Notes tab adds your approval/rejection comments, and the History tab updates with all of your information.

Approver names	0	1	1
<u>Steven Snyder</u>	<input type="radio"/> Pending	<input checked="" type="radio"/> Approved	<input type="radio"/> Rejected
<u>Roger Smith</u>	<input type="radio"/> Pending	<input type="radio"/> Approved	<input checked="" type="radio"/> Rejected

Steven Snyder  Pending  Approved  Rejected

Notes  
Everything appears in order.

SAVE CANCEL

### Approvals

In this example, there are two Approver names. User 1 approved the Stage and saved their notes. When either user opens the Scorecard, they see who **Approved** in the green box. Approvals are not locked, as User 1 can change from Approved to Rejected if they have to (and update Notes accordingly). Any changes generate a new email.

## Rejections

Users who do not approve the stage will show “Rejected” in the red box. As with Approvals, users can reopen the Approver(s) Scorecard and change their rejection to Approved (and update notes accordingly). Any changes will also generate an email to all approvers.

Whenever a stage is rejected, the workflow “locks” the stage in place until such time the Contract is again reviewed and Rejections are changed to Approvals.

### Approver(s)

✖

---

#### Approver(s) Scorecard:

	1	0	1
Approver names			
Steven Snyder	<input checked="" type="radio"/> Pending	<input type="radio"/> Approved	<input type="radio"/> Rejected
<u>Roger Smith</u>	<input type="radio"/> Pending	<input type="radio"/> Approved	<input checked="" type="radio"/> Rejected

Roger Smith  Pending  Approved  Rejected

Notes  

The Effective Date is incorrect. It should be March 1, 2018.

## Concurrent Stage Email Notifications

Assignees are notified by email whenever a Stage has been Approved or Rejected. For these Concurrent Workflow Stages, the *Approver(s) Scorecard* is added to the email. This graphic scorecard shows the **Notes** alongside each Approved or Rejected Status.

### iContracts: Workflow Stage Approval/Rejection

 iContracts Admin  
11:37 AM

To: [steve.snyder.work@gmail.com](mailto:steve.snyder.work@gmail.com)

Workflow Stage Approval Status has changed for Contract : **New Grant for Summer Enhancement Programs (284805)**

**Contract Name :** New Grant for Summer Enhancement Programs (284805)  
**Workflow Name :** Concurrent Workflow Stage Approvals  
**Stage Name :** Active  
**Days In Current Stage :** 0  
**Status :** Approved  
**By User :** Roger Smith  
**Additional Notes :** The Effective Date has been corrected. . Contract will be moving to Executed

#### Approver(s) Scorecard:

Approver names	0	2	0	Notes
Steven Snyder	 Pending	 Approved	 Rejected	Everything appears in order.
Roger Smith	 Pending	 Approved	 Rejected	The Effective Date has been corrected.

Summary: All Assignees have responded and have APPROVED for this Stage -- Workflow Auto-Advancing to next Stage.

This Contract requires follow-up/attention. To access the contract container, please [Click Here](#)

## Automatically Advancing Stages

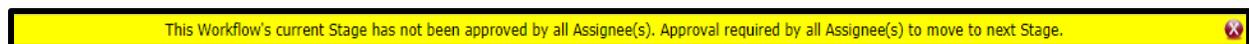
If anyone has Rejected a Stage, the stage will not advance. Once all assignees have Approved the stage, the Stage then automatically advances to the next stage in the Workflow.

The image above shows under **Additional Notes** that the Contract will be moving to the next Stage (which is “Executed” for this example).

## Warning Messages

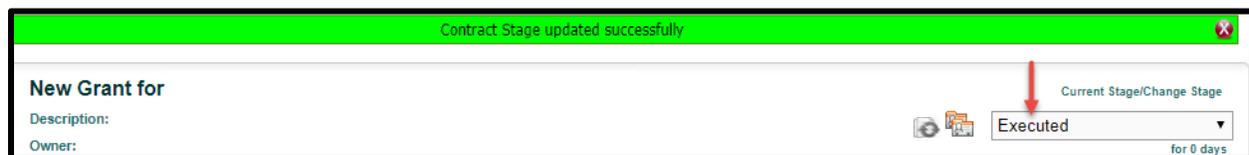
### Advancing A Stage Before All Assignees Approve

If an Approver tries to advance the Stage without using the Scorecard, they will see this message.



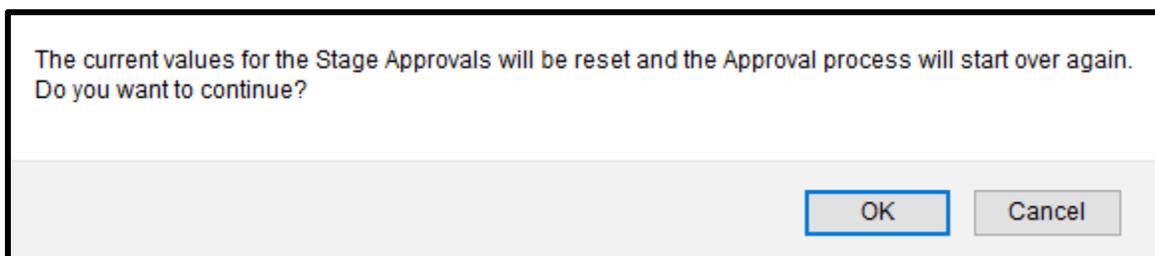
### After All Assignees Approve

Once all Approvers update the Scorecard with “**Approved**” (and enter a Note), then **Save**, they see this message and the Stage advances automatically.



### Moving a Stage Backwards After All Assignees Approved

For whatever reason, if an Approved Stage must be retracted and moved backwards, this warning message displays.



If you click **OK** the entire Approval process will start all over again and each Stage Assignee will have to review and approve the Workflow Stage once again to automatically move the Stage forward.

## History and Note Tabs Updated

Approvals and Rejections are noted in the History tab for auditing purposes.

The Notes tab also displays a record of each transaction.

Stage updated to Executed	Stage	Stage Forward from Active to Executed after 0 days
Workflow (Concurrent Workflow Stage Approvals), stage (Active) approval status updated to Approved By Roger Smith. Contract will be moving to Executed. Additional Notes: The Effective Date has been corrected.	Notes	Workflow (Concurrent Workflow Stage Approvals), stage (Active) approval status updated to Approved By Roger Smith. Contract will be moving to Executed.
Workflow (Concurrent Workflow Stage Approvals), stage (Active) approval status updated to Approved By Roger Smith. Contract will be moving to Executed.	Stage	Workflow (Concurrent Workflow Stage Approvals), stage (Active) approval status updated to Approved By Roger Smith. Contract will be moving to Executed.
Workflow (Concurrent Workflow Stage Approvals), stage (Active) approval status updated to Approved By Steven Snyder. Additional Notes: Everything appears in order.	Notes	Workflow (Concurrent Workflow Stage Approvals), stage (Active) approval status updated to Approved By Steven Snyder.
Workflow (Concurrent Workflow Stage Approvals), stage (Active) approval status updated to Approved By Steven Snyder.	Stage	Workflow (Concurrent Workflow Stage Approvals), stage (Active) approval status updated to Approved By Steven Snyder.

## Mixing ANDs & ORs in Contract Views Criteria – The Advanced Search Function

 This is considered an **Advanced UCM feature**, and therefore may not be suitable for all audiences, but available for your use should the need arise. **If** you're having trouble getting your *Contract Views* to give you the intended results, contact iContracts Support for additional help.

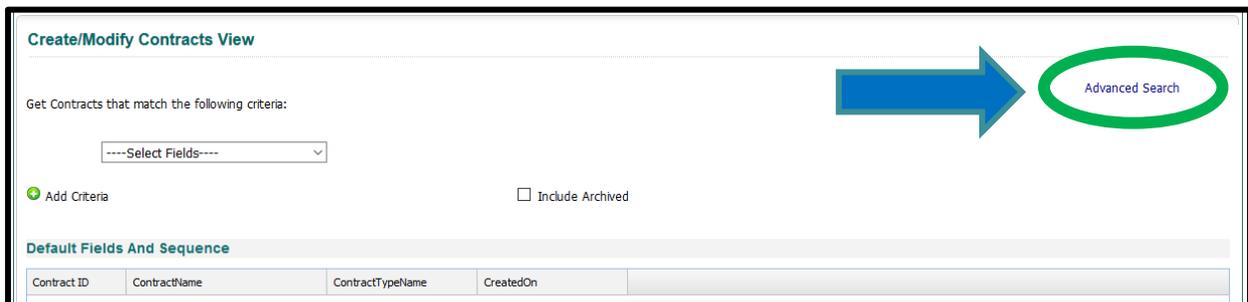
In the past, if you were forming a Contract View and wanted to use both ANDs and ORs as “connectors” within the same View, you might get “other than expected” (what some would consider flat-out-wrong) results since the system wasn't interpreting your criteria correctly.

Now, with the addition of left and right parentheses, you can *help* the system understand how it should interpret what you're really asking it to show. Like in mathematics, any equation surrounded by parentheses are calculated first, and in a group.

**Important:** No immediate changes are needed. All of your existing Contract Views will continue to work as they always have, without making any changes to current Saved Views.

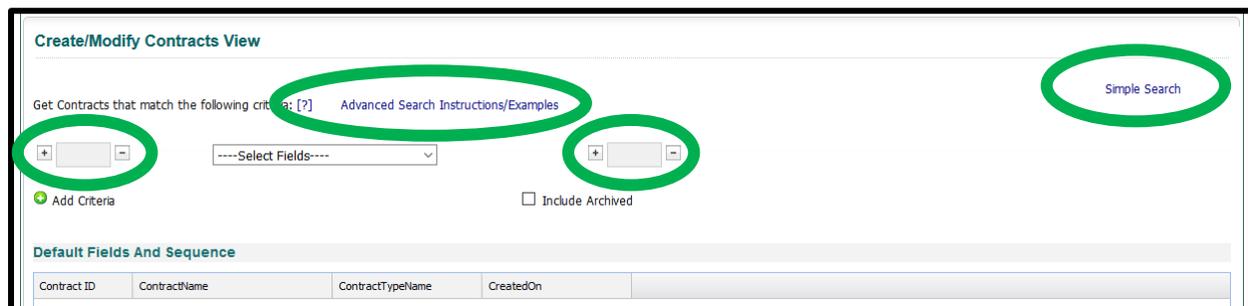
If you do have a need to use the new **Advanced Search** function, then you'll find the words “Advanced Search” to the right of where you will setup your Create/Modify Contracts View.

On any Contracts View, this link toggles the screen from Simple Search:



The screenshot shows the 'Create/Modify Contracts View' interface. At the top, there is a title 'Create/Modify Contracts View'. Below it, the text 'Get Contracts that match the following criteria:' is followed by a dropdown menu labeled '----Select Fields----'. There are two buttons: 'Add Criteria' (with a green plus icon) and 'Include Archived' (with a checkbox). Below this is a section titled 'Default Fields And Sequence' with a table containing columns: 'Contract ID', 'ContractName', 'ContractTypeName', and 'CreatedOn'. In the top right corner, there is a link labeled 'Advanced Search' which is circled in green. A large blue arrow points from the left towards this link.

To Advanced Search:



The screenshot shows the 'Create/Modify Contracts View' interface. At the top, there is a title 'Create/Modify Contracts View'. Below it, the text 'Get Contracts that match the following criteria:' is followed by a link labeled 'Advanced Search Instructions/Examples' which is circled in green. There is also a dropdown menu labeled '----Select Fields----'. There are two buttons: 'Add Criteria' (with a green plus icon) and 'Include Archived' (with a checkbox). Below this is a section titled 'Default Fields And Sequence' with a table containing columns: 'Contract ID', 'ContractName', 'ContractTypeName', and 'CreatedOn'. In the top right corner, there is a link labeled 'Simple Search' which is circled in green. Additionally, the plus and minus icons on the 'Add Criteria' button are circled in green.

and back again to a Simple Search.

Did you notice the [\[?\]](#) which you can click for more information on what the Advanced Search is meant for and a clickable “[Advanced Search Instructions/Examples](#)” link that will open a PDF document for your review in a new tab on your web browser.

If you need to add one or more (‘s to the beginning of one of your criteria, you’ll click the + on the left side of one of the boxes.

If you need to add one or more )’s to the end of one of your criteria, you’ll click the + on the left side of one of the boxes.

You may click the + multiple times if you need more than one ( or ).

Likewise, the - will take away one or more (‘s or )’s that you no longer need.

 See the example on the next page.

Use **Advanced Search** if your View contains a complex order of operations such as combining “AND” “OR” criteria.

**Example:** I want a report of all Construction, Lease, and Service Agreements that are Active (Stage is Active **OR** Executed) **AND**

have my name on them as either an Owner **OR** Primary Party.

First, I want to report on the Contract Type criteria:

	ContractTypeName	▼	contains	▼	Construction
or ▼	ContractTypeName	▼	contains	▼	Lease
or ▼	ContractTypeName	▼	contains	▼	Service

Then, I want to report on the active contracts within this set:

	StageName	▼	contains	▼	Active
or ▼	StageName	▼	contains	▼	Executed

Finally, I want to look for my name on the contract:

	Owner	▼	=	▼	My Name
or ▼	PrimaryParty	▼	=	▼	My Name

With this new enhancement, put parentheses ( and ) around each of these *sets* and use the “AND” operator:

+ (  - ContractTypeName contains Construction  +  -

or ▼

+  - ContractTypeName contains Lease  +  - remove

or ▼

+  - ContractTypeName contains Service  + )  - remove

and ▼

+ (  - StageName contains Active  +  - remove

or ▼

+  - StageName contains Executed  + )  - remove

and ▼

+ (  - Owner contains My Name  +  - remove

or ▼

+  - PrimaryParty contains My Name  + )  - remove

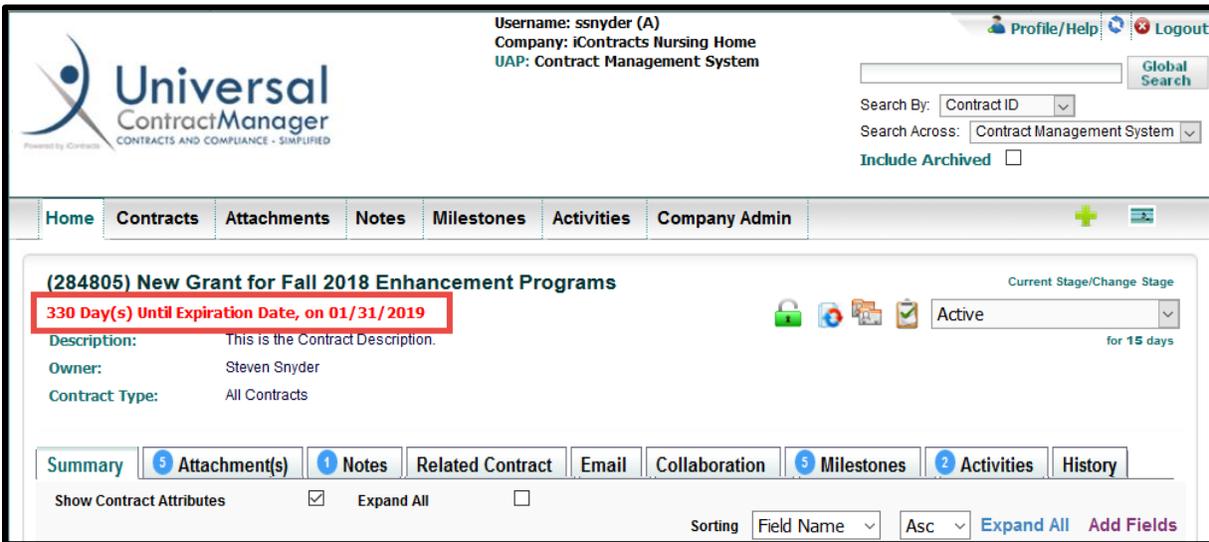
Just like a mathematical equation, the criteria inside each set of parentheses are searched first AND then combined as one set of results in your Contract View.

## Countdown on Contract Summary

UCM has added an enhancement which displays a countdown on the contract *Summary Tab* in **red text**, based on a date field within that container. When the date passes, the message changes from “**x days until ...**” to “**x days after ...**”. UCM Admins determine which Date field is used for the Countdown.

### Viewing Countdown Alerts on the Summary Tab

All *User Types* will have visibility to this countdown based on their **View Contract** permissions.



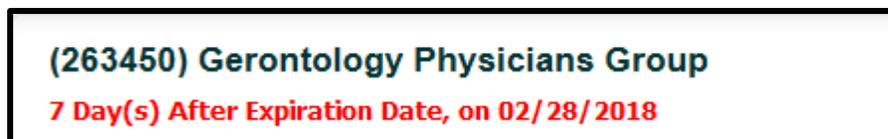
The screenshot shows the Universal Contract Manager interface. At the top, the user is identified as 'ssnyder (A)' from 'iContracts Nursing Home'. The main navigation bar includes 'Home', 'Contracts', 'Attachments', 'Notes', 'Milestones', 'Activities', and 'Company Admin'. The current view is the 'Summary' tab for contract '(284805) New Grant for Fall 2018 Enhancement Programs'. A red box highlights the countdown message: '330 Day(s) Until Expiration Date, on 01/31/2019'. Below this, the contract details are listed: Description: 'This is the Contract Description.', Owner: 'Steven Snyder', and Contract Type: 'All Contracts'. The interface also shows a 'Current Stage/Change Stage' dropdown set to 'Active' and a 'for 15 days' indicator. At the bottom, there are options for 'Show Contract Attributes', 'Expand All', and sorting controls.

The example below shows a countdown based on another date field, titled *Quarterly Profit Report*:



This close-up shows the contract title '(284805) New Grant for Fall 2018 Enhancement Programs' and a red countdown message: '14 Day(s) Until Quarterly Profit Report Due, on 03/21/2018'. Below the message, the contract details are listed: Description: 'This is the Contract Description.', Owner: 'Steven Snyder', and Contract Type: 'All Contracts'.

This next example shows how the countdown looks after your chosen date field, *Expiration Date* in this case, has passed:



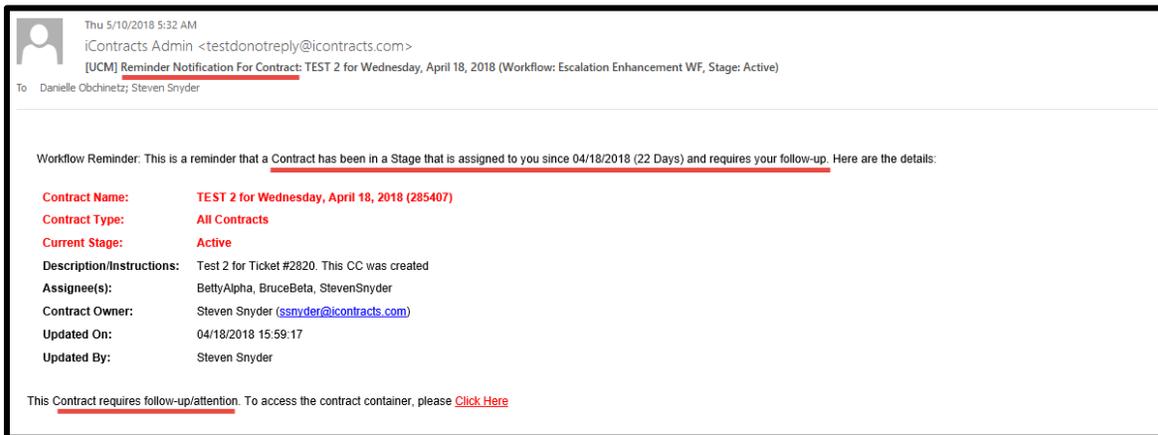
This close-up shows the contract title '(263450) Gerontology Physicians Group' and a red message: '7 Day(s) After Expiration Date, on 02/28/2018'.

## Workflow Stage Reminders and Escalation Emails

Another UCM Enhancement that now allows Admins to create an alert to notify user(s) by email if a Workflow Stage has not moved on after a set number of days. Admins can then set a warning message to the Stage Assignee and then notify another user(s), like a Manager or Legal Counsel, if the stage has still not advanced after another set number of days. This escalation email can be repeated every *X days*, until the Stage finally advances (or moves to a previous stage).

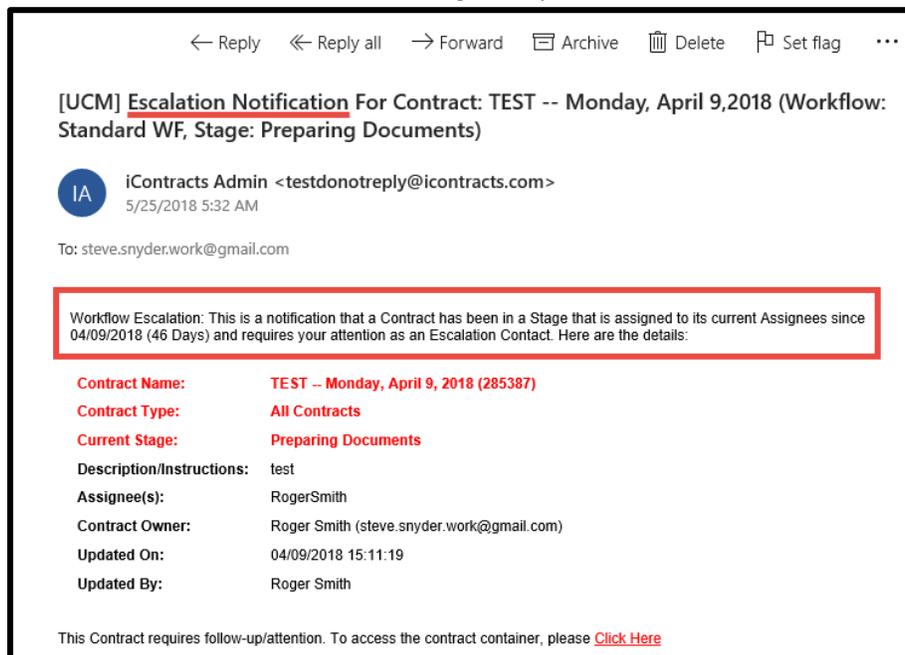
### Email Notifications

**You've got mail.** If a Contract has been at the Stage configured for a *Reminder Email*, the Assignee(s) will receive an email similar to the following example:



Use the "[Click Here](#)" hyperlink at the bottom of the email to access UCM and sign in to view the Contract Container.

However, if a Contract has been at the Stage configured for an *Escalation Email*, the Escalation User(s) will receive a different email, similar to the following example below:



## Email Responses to Activities

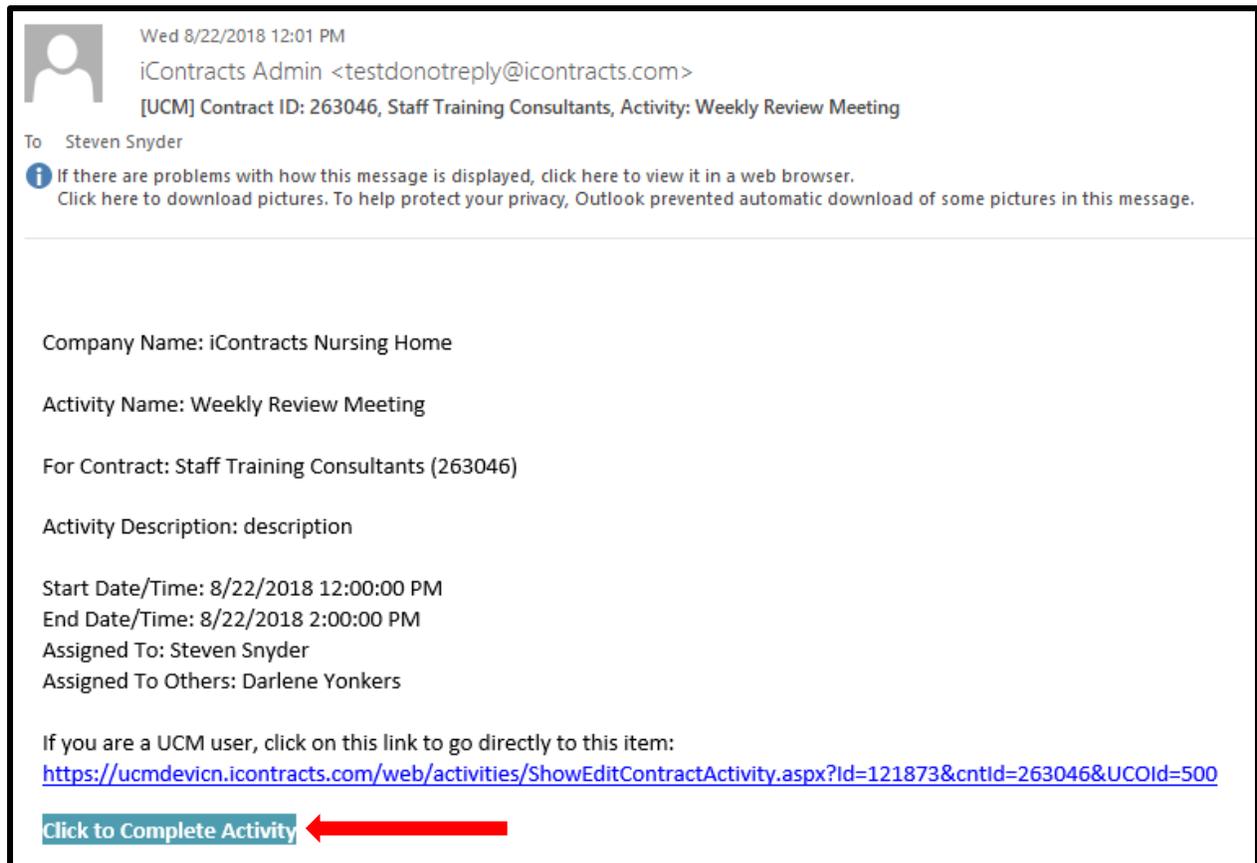
We have introduced a new feature in the *Activities notification email* which allows the **“Assigned To”** users, including *No Log-In Users*, to **Complete the Activity** directly from within the email. This change requires that a separate email is sent to each user associated with an individual activity. Therefore, we are adding the names of the *“Assigned To”* and *“Assigned To Others”* users to the email message. Previously, the *“Assigned To”* user was on the **To** line and *“Assigned Others”* were on the **CC** line within one email.

Only the *“Assigned To”* user will be able to Complete the Activity directly from the email. Regardless of User-Type – Admin, Full-Access, Read-Only, or No-Login – this user will see a blue button at the bottom of their notification email. Any user set as an *“Assigned Other(s)”* will **NOT** have this functionality, just the email link to the Container. Both Assigned To drop-down lists still include Owner, Primary, Secondary, or Tertiary users, as well as individual active users.

## Receiving the Activity Notification Emails

### Assigned To Users

Users setup as *“Assigned To”* receive their Notification Email with a blue **“Click to Complete Activity”** button at the bottom of the email.



The screenshot shows an email notification from iContracts Admin. The header includes the date and time (Wed 8/22/2018 12:01 PM), the sender (iContracts Admin <testdonotreply@icontracts.com>), and the subject ([UCM] Contract ID: 263046, Staff Training Consultants, Activity: Weekly Review Meeting). The recipient is Steven Snyder. Below the header, there is a message icon and a link to view the message in a web browser. The main body of the email contains the following information:

- Company Name: iContracts Nursing Home
- Activity Name: Weekly Review Meeting
- For Contract: Staff Training Consultants (263046)
- Activity Description: description
- Start Date/Time: 8/22/2018 12:00:00 PM
- End Date/Time: 8/22/2018 2:00:00 PM
- Assigned To: Steven Snyder
- Assigned To Others: Darlene Yonkers

At the bottom, there is a link for UCM users to go directly to the item: <https://ucmdevicn.icontracts.com/web/activities/ShowEditContractActivity.aspx?Id=121873&cntId=263046&UCOId=500>. Below the link is a blue button labeled "Click to Complete Activity" with a red arrow pointing to it.

## Assigned To Others

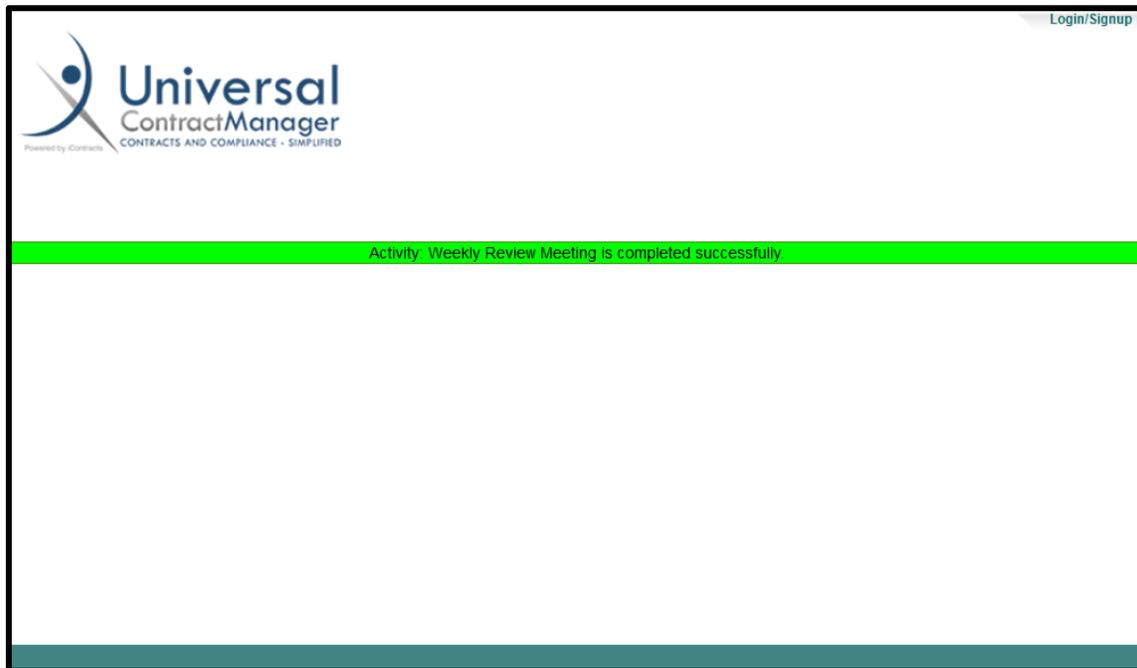
Users setup as “Assigned To Others” receive their Notification Email without the “Click to Complete Activity” button at the bottom of the email. Instead, these users have just the link to direct them to UCM, where they can log into the system to access the Activity for that Contract Container.



## Completing Activity via Email Button

Whether or not you are logged into UCM prior to clicking the “**Click to Complete Activity**” link, you will be taken to a landing page that looks like this:

The *Activity Name* appears as part of the UCM message. You will always see **[Activity Name] is completed successfully**. You can also click on the “**Login/Signup**” link in the upper-right corner to log into UCM or simply close the page. You can still click on the UCM link in the email to log into UCM and be taken directly to the Container. However, if you click the “*Click to Complete Activity*” button again, you will get another message, stating the **[Activity Name] is already completed**.





**Universal**  
**ContractManager**  
CONTRACTS AND COMPLIANCE - SIMPLIFIED

---

# READ-ONLY MANUAL