UCM Full-Access Manual

A Guide to Universal Contract Manager (UCM)

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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.**

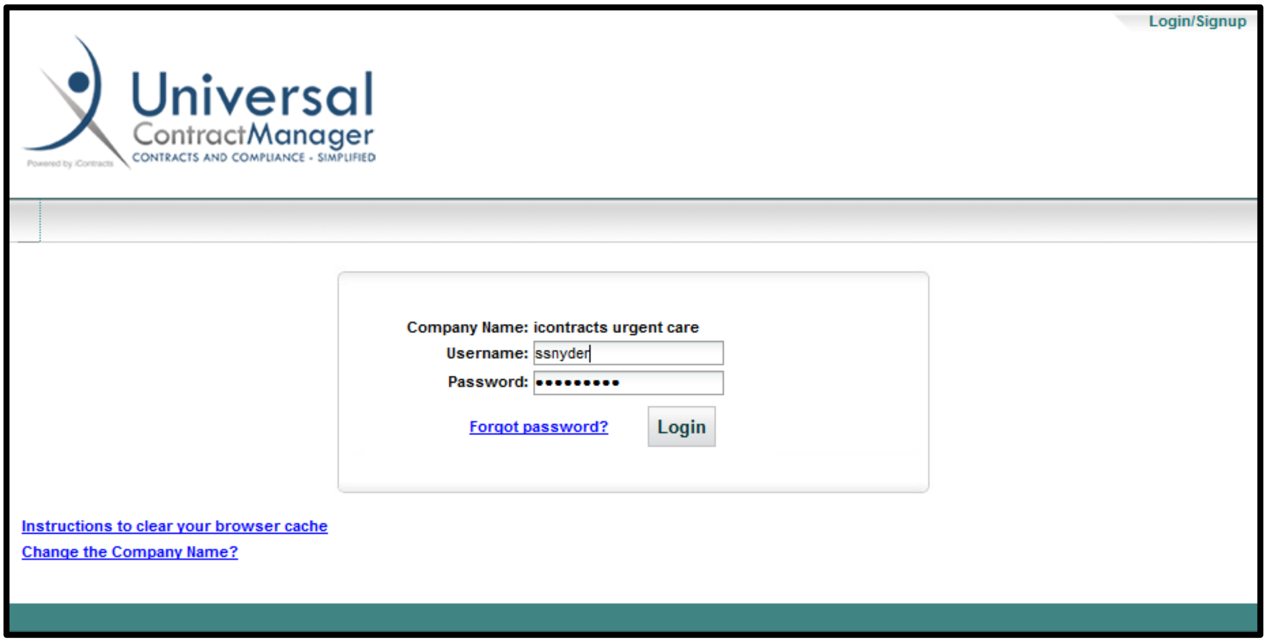
Table of Contents

Logging Into iContracts UCM

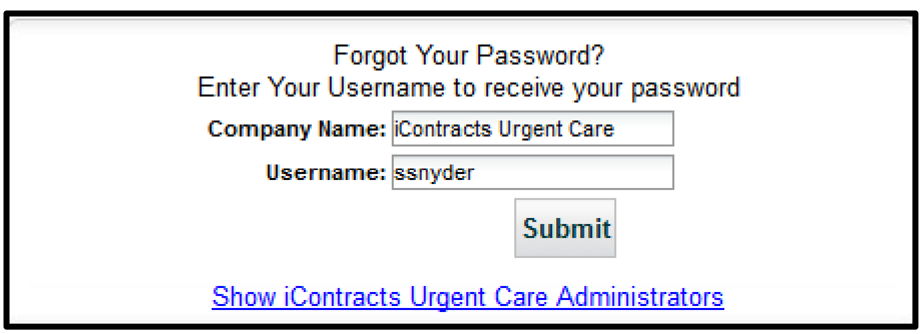
Upon setup, your company portal will be assigned, along with initial Usernames and Security Access.

https://ucm.iContracts.com

Bookmark this URL! 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. After setting your password, any new users are then redirected to the UCM Login Screen where they enter their newly-created password to sign into the system. Future logins are done from this page (see the URL above). Did we mention to bookmark this URL?



Forget Your Password?



In order to retrieve a forgotten password, simply click on the *Forgot Password?* link and follow the prompts.

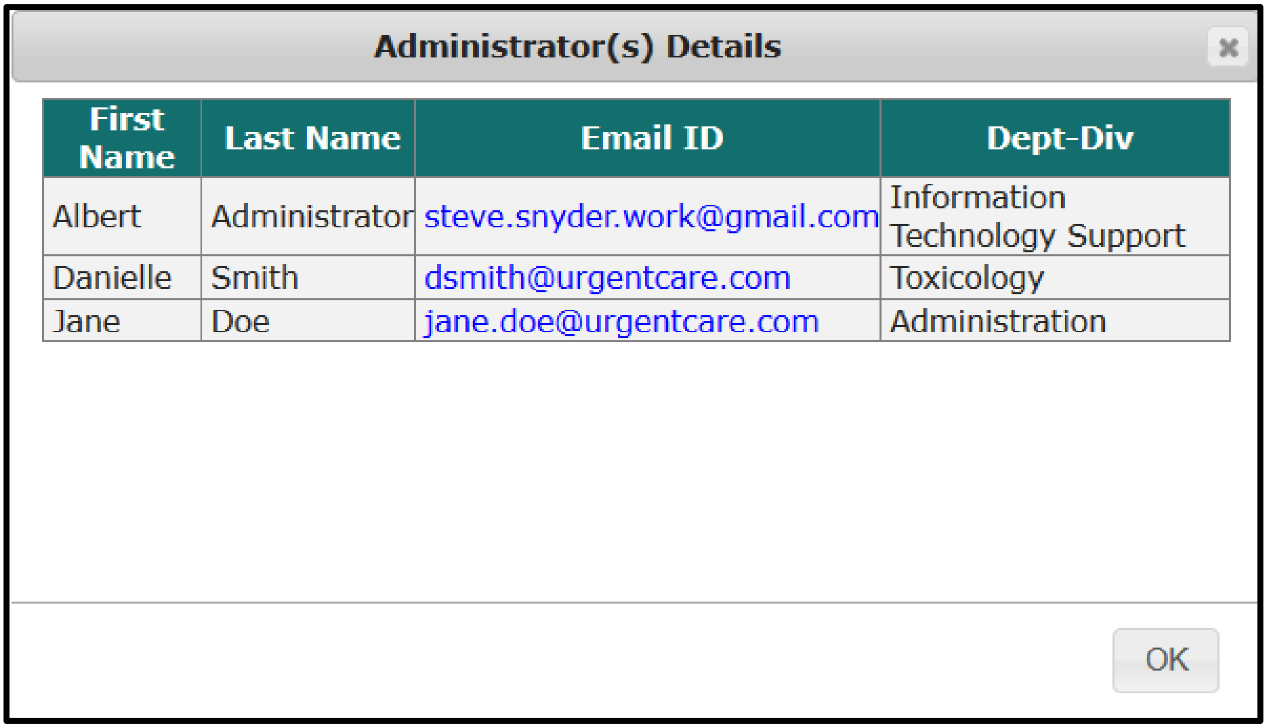
When you click **Submit**, this generates an email to you, which provides a link to reset your password. Click on this link and you will be directed to a screen where you can create a new password. There will be a second text field to confirm your new password. These two password entries must match.

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

How to Display Your UCM Administrators – An Optional Feature

When logging into UCM, you get **5 attempts** to login correctly before UCM locks you out of the system and makes your username inactive for security purposes.

However, if you need to reach out to your UCM Administrators directly, click on the hyperlink (if your Admins turned this on for your company) "**Show [company name] Administrators**". For security reasons, you must first enter your Company Name and Username (even if your Username is currently in an inactive status).



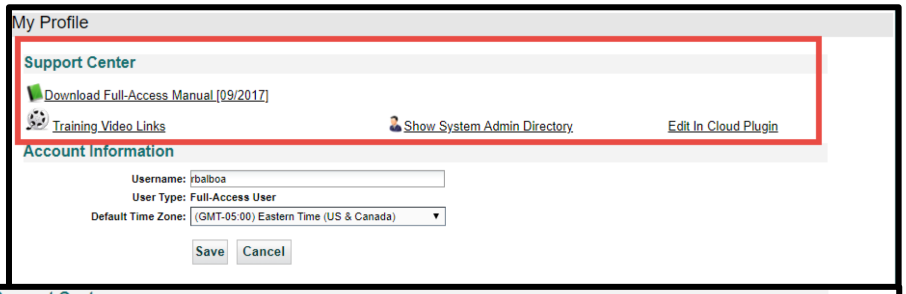
First Name	Last Name	Email ID	Dept-Div
Albert	Administrator	steve.snyder.work@gmail.com	Information Technology Support
Danielle	Smith	dsmith@urgentcare.com	Toxicology
Jane	Doe	jane.doe@urgentcare.com	Administration

Click on the (blue) hyperlink for an administrator's email address to generate a new email to that admin. After sending the email, click **OK** to exit the *Administrator(s) Details* screen and return to the login screen.

Updating your User Profile

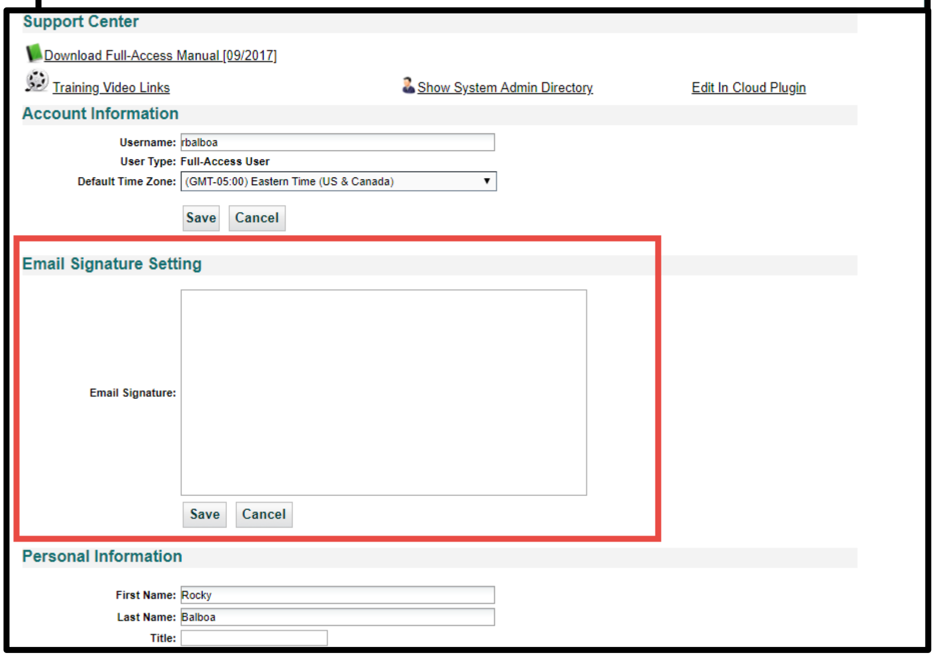
You can update your profile by clicking on the "*Profile/Help*" link at the top right of any page inside of UCM.

Most settings in this area do not require intervention from your UCM Administrator. Enter the information you would like and click "**Save**". Only a System Administrator can change your Username, User Type or Email Address.



In the **Support Center** area, you can download the manual you are currently reading, find the Full-Access Training Video Links, display the System Admin Directory, or install the Edit in Cloud Plugin (Chrome browsers only, if enabled).

Email Signature Setting



Currently, the email signatures are text-only (no graphics, like a company logo).

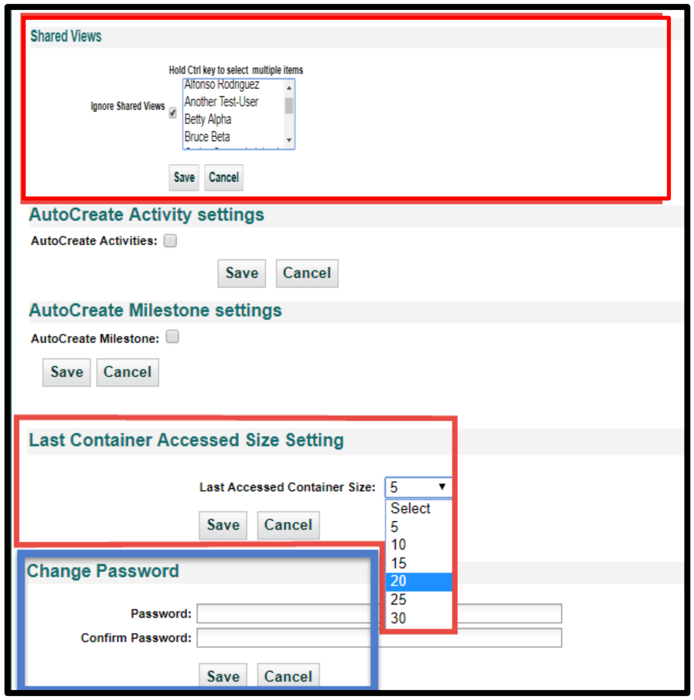
Type your signature in the **Email Signature** text box, or you can copy your signature from another email program (remember, no graphics here). Edit the text box to "clean up" the signature as needed.

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

Shared Views Setting

Also, 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. If you select, a list of Users appears.

To select multiple Users, hold down the CTRL key.



Last Container Accessed Size Setting

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.

Changing your Password

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.

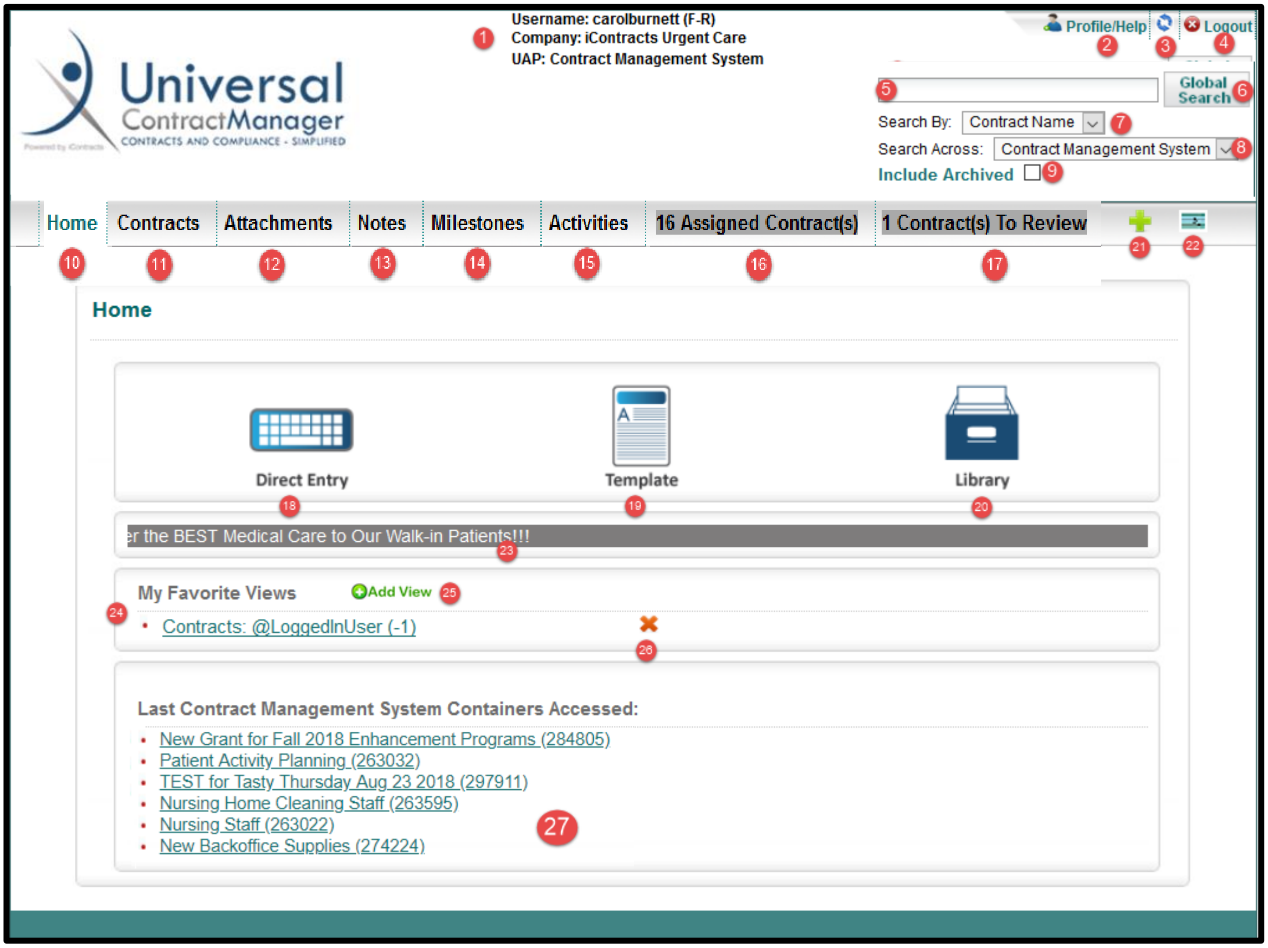
Each company can set their Password Rules but generally:

- 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 Directory** or **Single Sign On** will NOT have access to this Change Password option in My Profile.

The Enterprise Ribbon: Home Screen



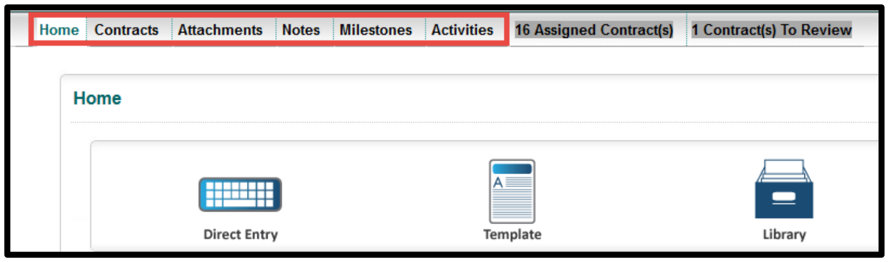
1. Login Information (Username/Co/Object)
2. Profile/Help
3. Refresh User Permissions (the "*dolphins*")
4. Logout Icon
5. Global Search Field
6. Execute Global Search Button
7. Search By (Drop-Down) Options
8. Search Across Objects (if applicable)
9. Include Archived Contracts Checkbox
10. Home Screen Button
11. Contracts Tab Button
12. Attachments Tab Button
13. Notes Tab Button
14. Milestones Tab Button
15. Activities Tab Button
16. Assigned Contract(s) Tab Button
17. Contract(s) To Review Tab Button
18. Direct Entry Button
19. Template Button
20. Library Button
21. Add New Contract Button
22. View Activities Icon
23. Announcement Text Bar
24. My Favorite Views area
25. Add View (to Favorites)
26. Delete View from Favorites
27. Last Contract Containers Accessed

Navigating Inside of 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.

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

The ***Notes tab*** will show a listing of notes across different contracts. You are able to create Views to capture data surrounding these notes.

The ***Milestone tab*** allows you to take a look at the Milestone notifications. These are based on certain dates and are sent to User's as emails. You can create views in this area to work with these notifications.

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

Adding Favorite Views

To add one of your views from another tab, click on the ***Add View*** green link.

This will cause the three dropdown lists to appear to the right. Leave the top selection alone (it should display *Enterprise Ribbon*). From the second dropdown, select the tab you would like to choose your View from (typically *Contracts*). Select the View from the *Select View* dropdown. Lastly, click on the Add button and this View will appear in the listing to the left.

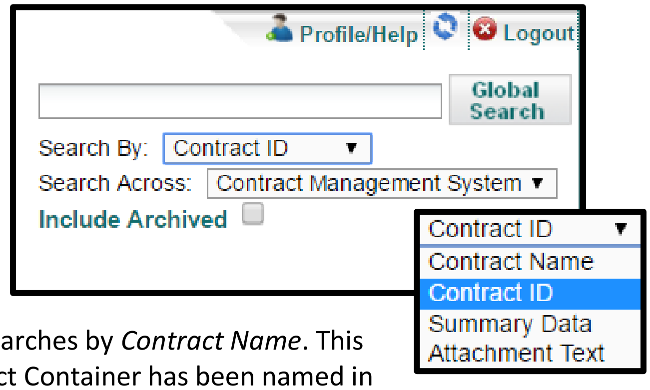
✍ **Note:** *Before you can Add a Favorite View, you must first create a Contract View (or Attachments, Activities, or Milestones View) beforehand. These steps are covered in later sections of this manual.*

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 User's name, document name, or anything else that shows up on the Summary Data page within the Container.

Attachment Text is the last option and allows you to search through the words on the actual documents by content in order to find a particular Container in your system. Users can search specific phrases by surrounding it with double quotes, which appear as "*search phrase*". The results are different than any other search result. Admins have received additional documentation on how this search is different.

Search Across

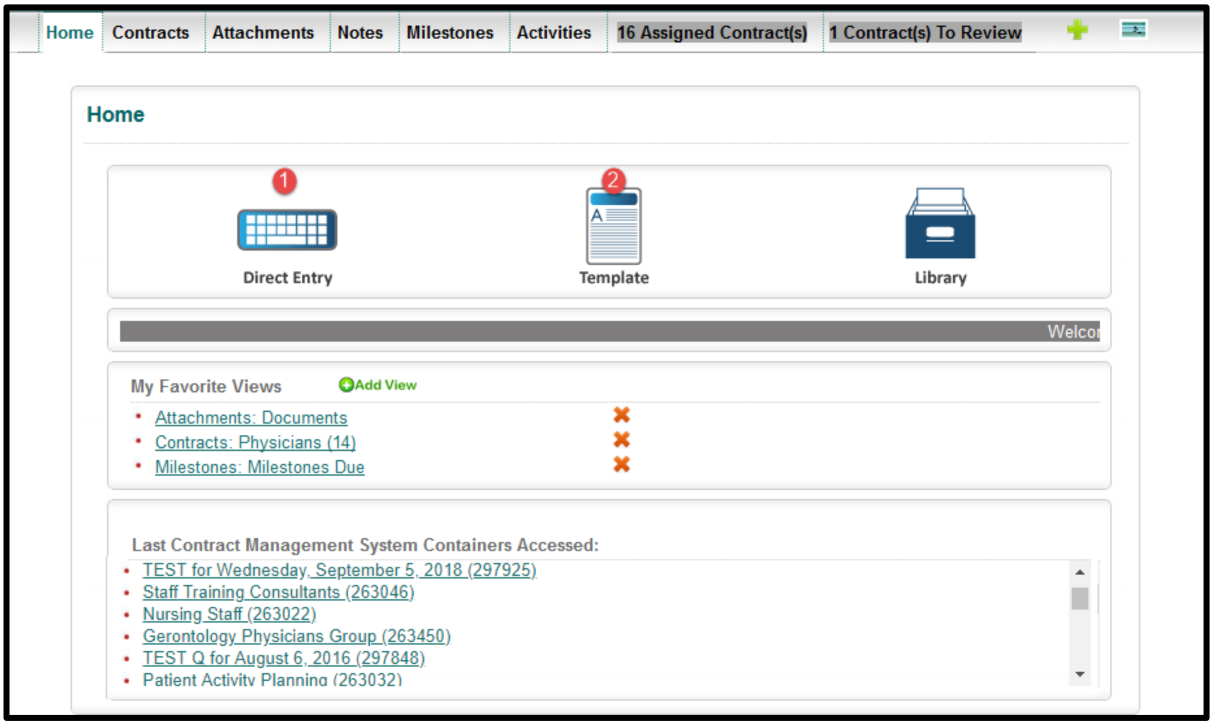
Search Across allows organizations with multiple objects to search through those different modules. If this option does not appear, you may not have another module at your organization, or you may not have access to the other module(s).

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 Home Tab: Entering Contracts into UCM



There are two methods for creating new contracts within UCM.

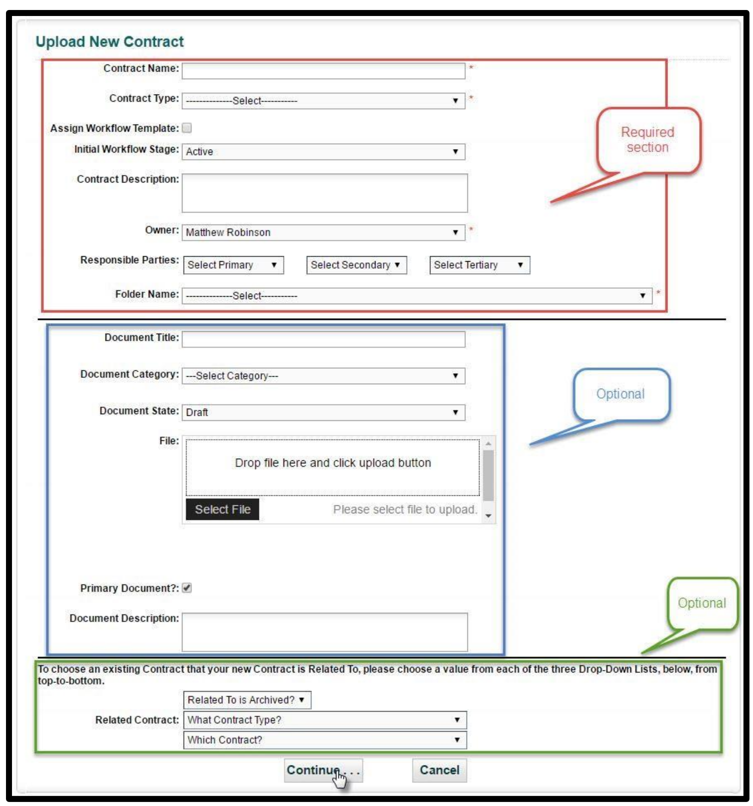
1. Direct Entry
2. Templates

There is also the Library (if available) to create new contracts but these procedures will be covered in a later section.

Direct Entry

Use Direct Entry to create a contract by entering the key information directly into UCM. Click on the **Direct Entry** button and enter all the *required information* (Contract Name, Contract Type, Owner, Folder Name), indicated by an * in the first section. Other information is suggested, but not required *(Workflow, Stage, Contract Description, Responsible Parties)*.

The next two sections, separated by bold black lines, are optional. You can enter an initial document or create a relationship between the new container and one already in your system.

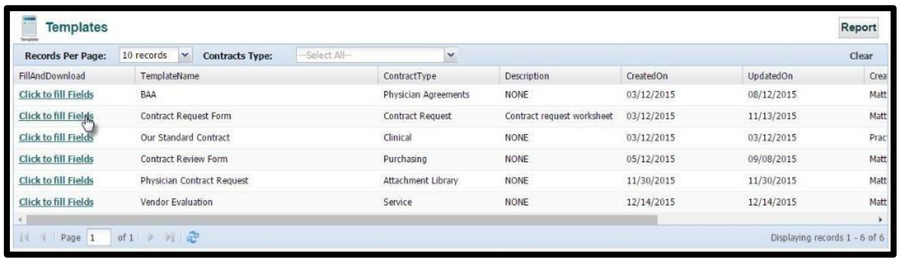


Click **Continue…** to create the new Contract Container. After the Contract Container is created, additional documents (that is, attachments) can be added to your Contract Container, as well as adding *Contract Fields* and *Field Groups*.

Using a Template

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.

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. This column can be positioned anywhere in the grid.



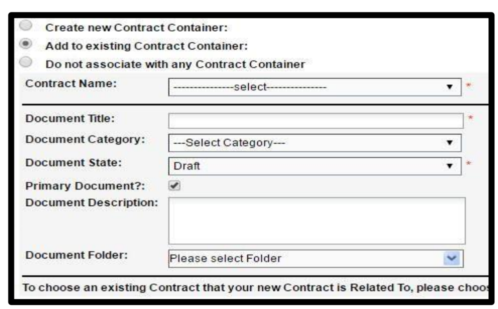
When you fill out a pre-made contract template, you can either create a new container, add it to a pre-existing contract container, or just send it to your desktop as a .doc or .pdf file.

Option 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.

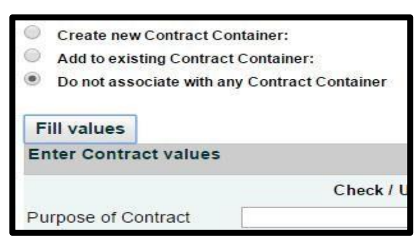
Option 2: Add to existing Contract Container

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.



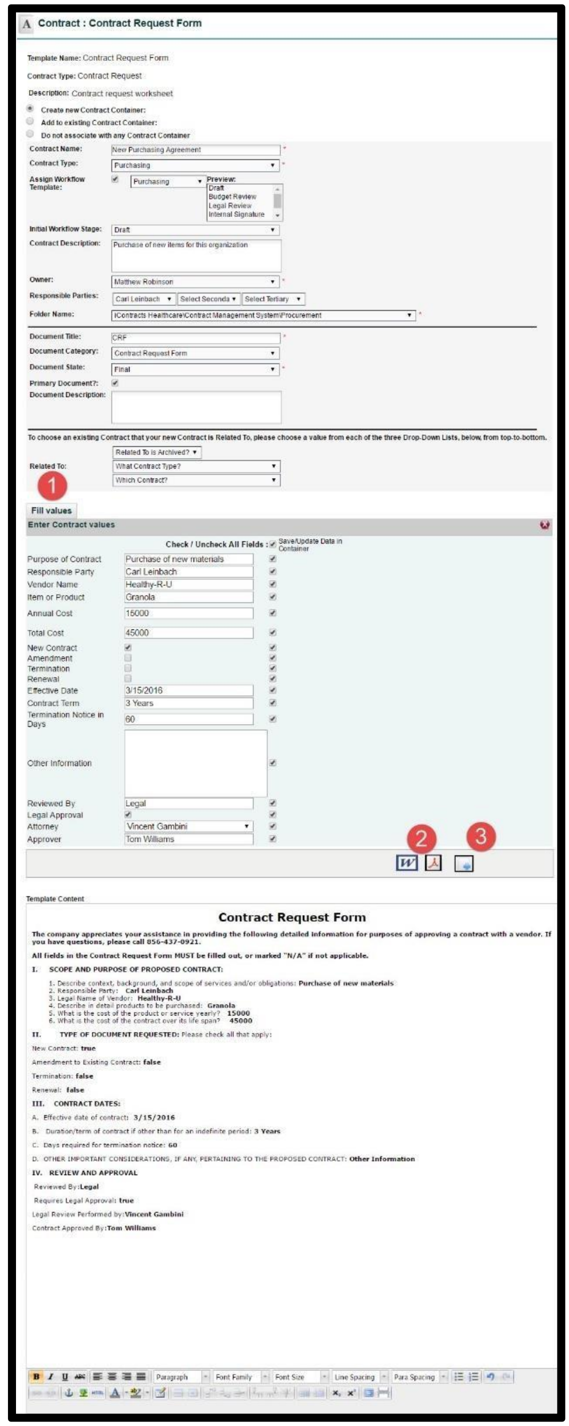
Option 3: Do not associate with any Contract Container

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. The *Check / Uncheck All Fields* checkbox may not be selected by default; select if you want these fields also added to the Contract Container's Summary tab in addition to the Template.

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:* After generating the document first, using either 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 2nd or 3rd Options to create contracts from Templates.

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.

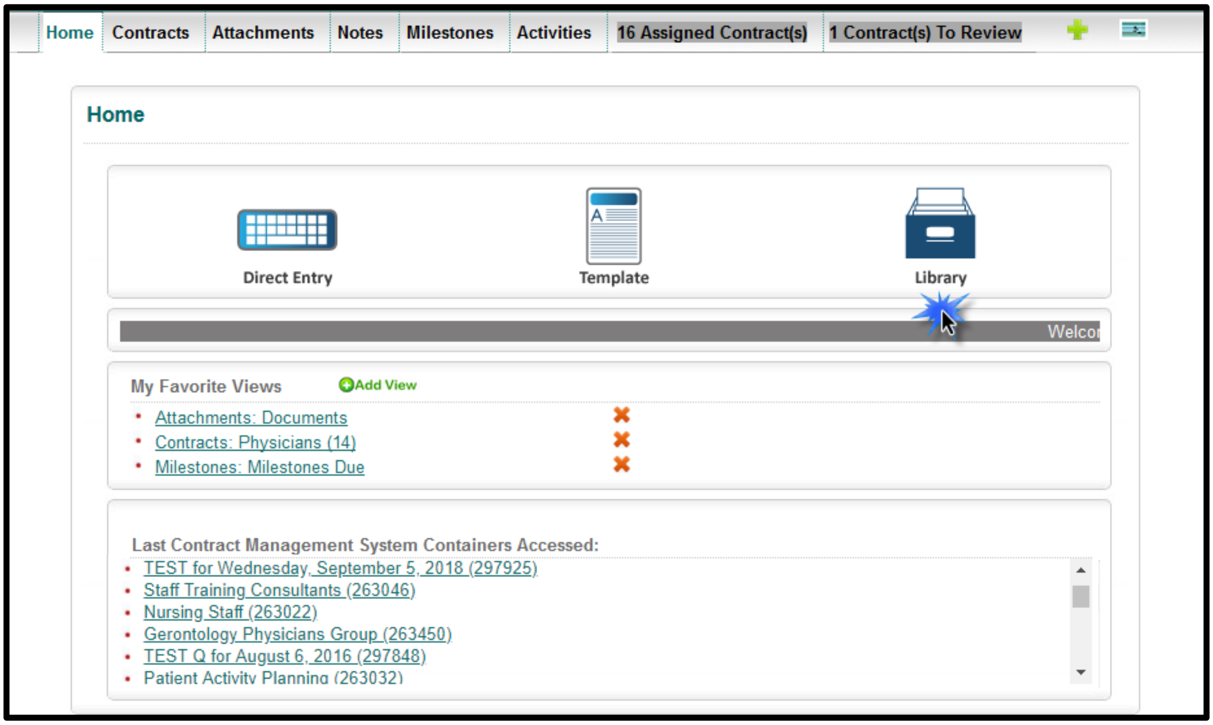
*Note: This area is completely optional; you can simply click **Save** to move on.*

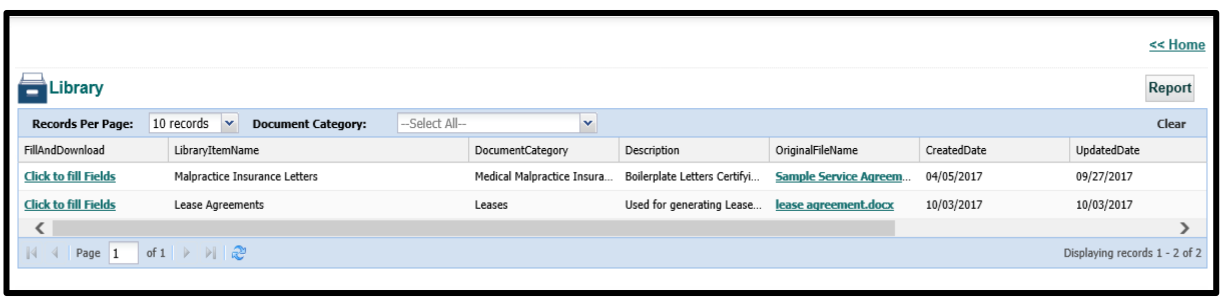
Once you select **Save**, the documents upload to that Container with basic metadata attached. You may want to update the data surrounding the document in the *Attachments* Tab for the Container.

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

Document Library

If the UCM System Administrators have allowed 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.

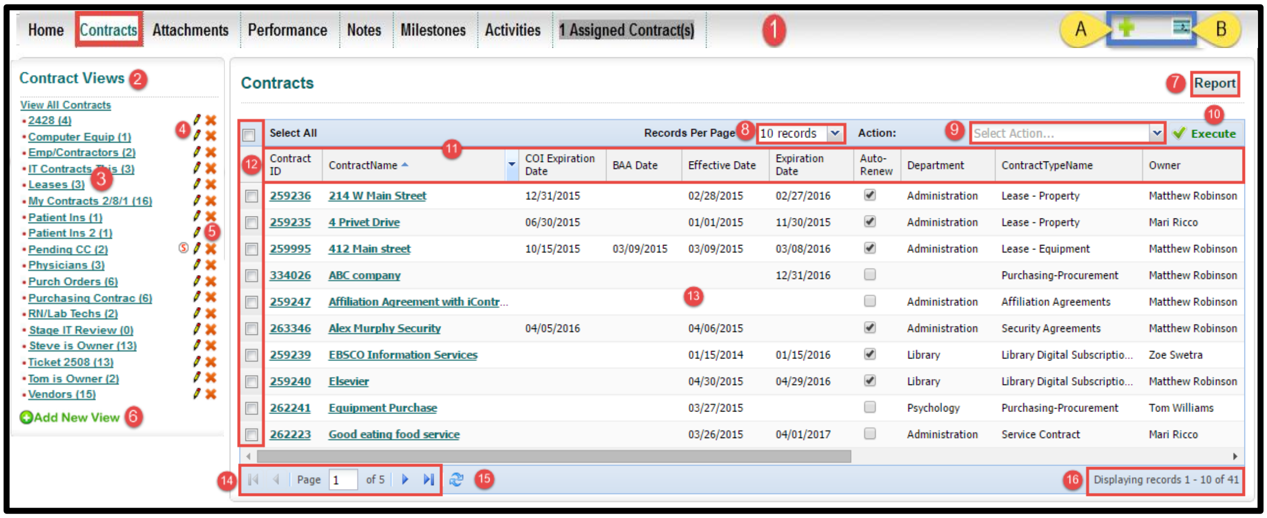




What makes these documents different than those found in Templates? These are mostly formatted Word documents loaded into UCM that can be used as "boilerplate" attachments for new contracts.

The "**Fill and Download**" procedures are similar to those in **Using a Template**. Click this link to refer back to the Templates section.

The Enterprise Ribbon: Contracts Tab



1. **Enterprise Ribbon**
   The items visible in this area depend on permissions given to you by your Administrators.
2. **Contract Views Area**
3. **Saved Views**
4. **Edit View**
5. **Delete View**
6. **Add New View**
7. **Report Button**
8. **Records Per Page DropDown**
9. **Contract Actions DropDown**
   You will only see this if given permissions by your Administrators (most of these functions are reserved for Admins anyway).
10. **Execute Command Button** *(see #9 above)*
11. **Contract Grid Column Headings**
12. **Select Contract Checkbox** *(see #9 above)*
13. **Contracts Grid Area**
14. **Contracts Grid Page Navigation Buttons**
15. **Refresh Grid Button**
16. **Displaying Records/Total Records**

These two icons in the upper right corner display in this area throughout the system. This allows you to *View any Activities* that may be assigned to you or to add a new Contract to the system quickly and easily from any screen.

- **A. Add Contract Icon**
- **B. View Activities Icon**

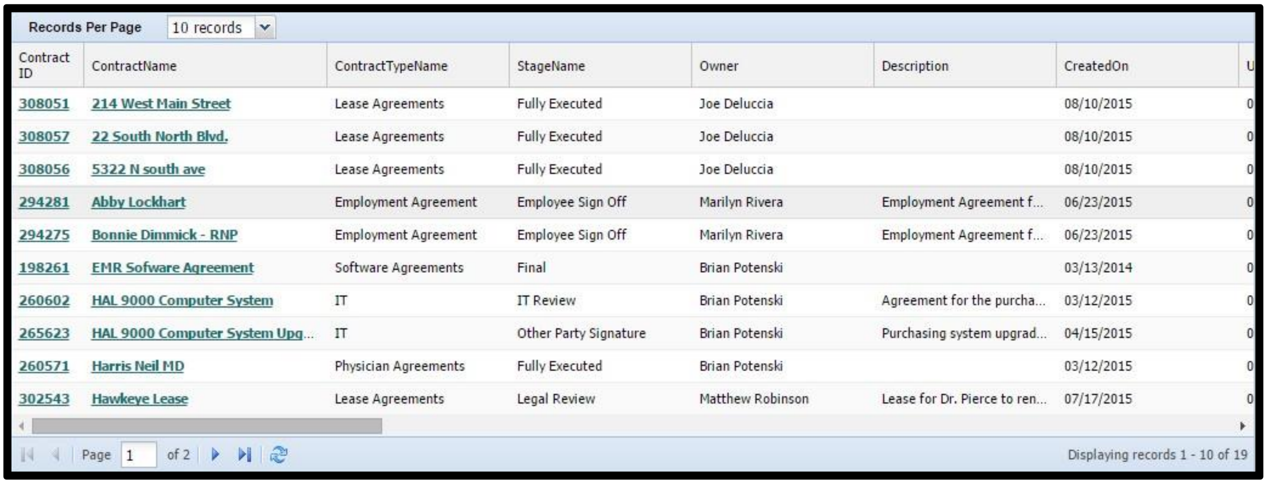
The **Contracts** tab provides users with a simple way to access all or any filtered set of Contracts, which we call "*Views*". In the Contract Views panel to the left, you can add or modify an unlimited number of saved searches that contain criteria such as multilevel sorting, page layouts, and the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

Users can also click on any column to sort the list in ascending or descending order or to select which columns will display in the active list pane.

By clicking on the **Report** button in the upper right-hand corner of the page (only visible if Permissions are assigned to you by Administrators), users may also download the complete file in Excel as a CSV (comma-delimited) readable format of Contracts in their active view pane. By clicking on any Contract title, the user will move from the list pane to a *Summary* tab of the selected Contract Container.

Working with the Grids

You can modify the grid layout to suit your personal preferences. Changes to the grid layout are stored within your profile so only you see the modified layout. In fact, *each user* can have a unique grid layout.



Records Per Page: 10 records

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

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. Double-click to auto size.

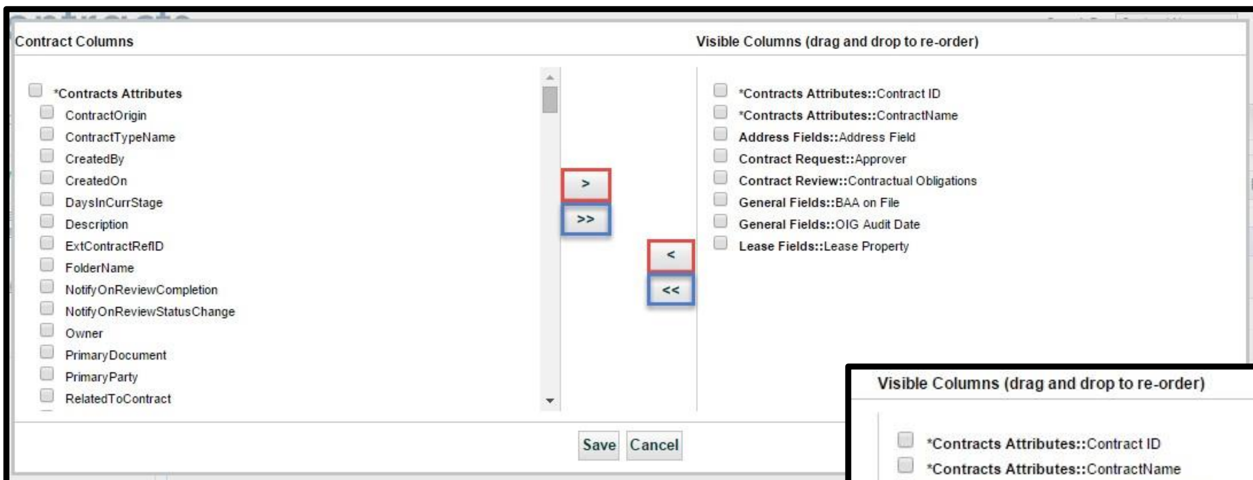
Click and drag in the middle of any heading to change the order of displayed columns.

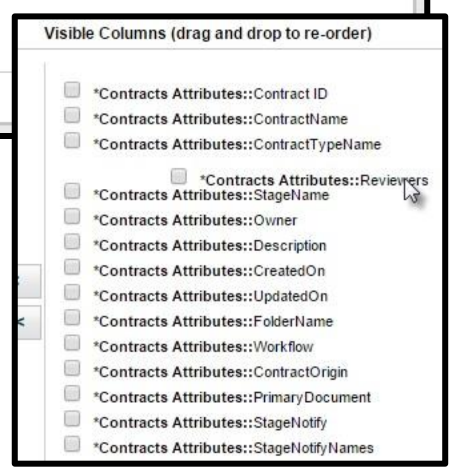
When hovering your mouse over any column heading a drop-down arrow appears. From this arrow, you click your mouse to be able to sort by ascending or descending order.

The third option on this list is *Columns*. This will bring up an area where you can decide what data fields will display 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 our software. Beneath these fields, are all of the custom fields set up for your system by your UCM System Administrators.
See the image below for an example.

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.





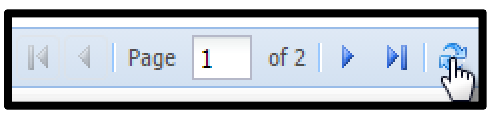
The single arrows (in red) will move only the fields that you have selected with their corresponding checkbox from one side to the other. The double arrows (in blue) will move ALL fields from one side to the other. This makes it easy to start from scratch and rearrange your grid as needed. Select the 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 the ***Save*** button. 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.

At the bottom-left of the grid, you can find the page number indicator and navigation area. To change pages, you can either click the left or right arrows, or type in the page number you would like to see, followed by pressing [Enter]. The number of pages available are dependent on the number of records per page.

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

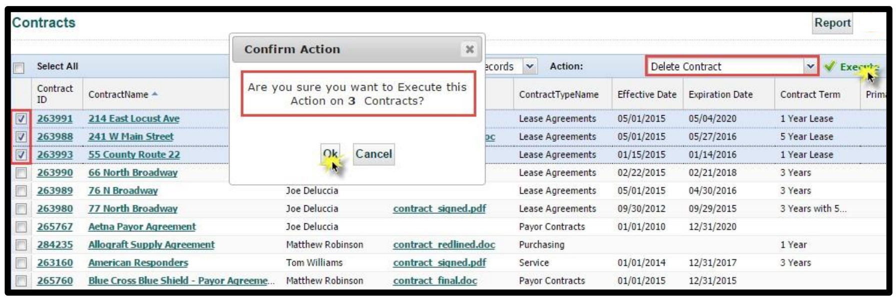


Finally, on the far bottom right, there will be a listing of how many total contracts match the entered criteria.

Contract Actions

Contract Actions include the ability to delete, copy, or modify a contract or selection of multiple contracts simultaneously. Users that are given permission (by admins) in the system to do so have rights granted to take these actions. They can also send a blanket email using an email field, or upload/create the same Document/Activity/Milestone within multiple contracts.

Delete Selected

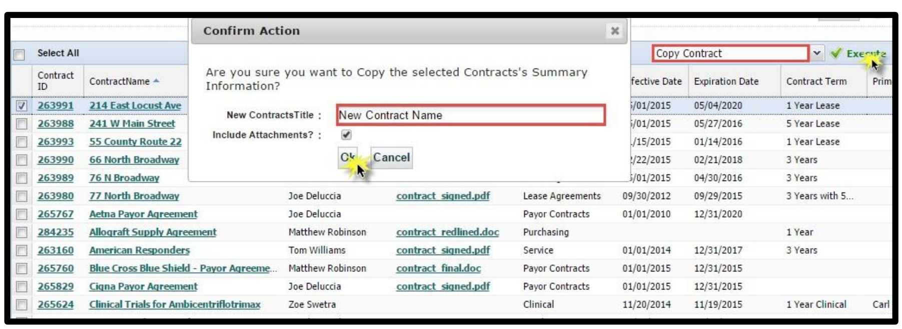


In order to delete a contract, the permission to do so must first be given in the User setup. Deleting a contract is a right that should have been given to a select few, as once you delete a contract from your system, **it cannot be undone**. However, by design, this action is not something that could easily happen accidentally. For audit purposes, any deleted contract is reported in the Contracts Deletion History grid.

To delete a contract, select the contract(s) that you would like permanently removed from your system. Then choose the drop-down indicator in the *Contract Actions* area at the top right of the grid. Select ***Delete Contract*** from the list of available Contract Actions. Then click to ***Execute*** the action.

When the Delete Contract Action has been Executed, you will receive a popup asking to confirm that the contract(s) selected should be deleted. Click **Ok** to remove those contracts permanently. The system displays a progress bar, showing these contracts are being deleted. When finished, these contracts are then removed from the grid.

Copy Contract

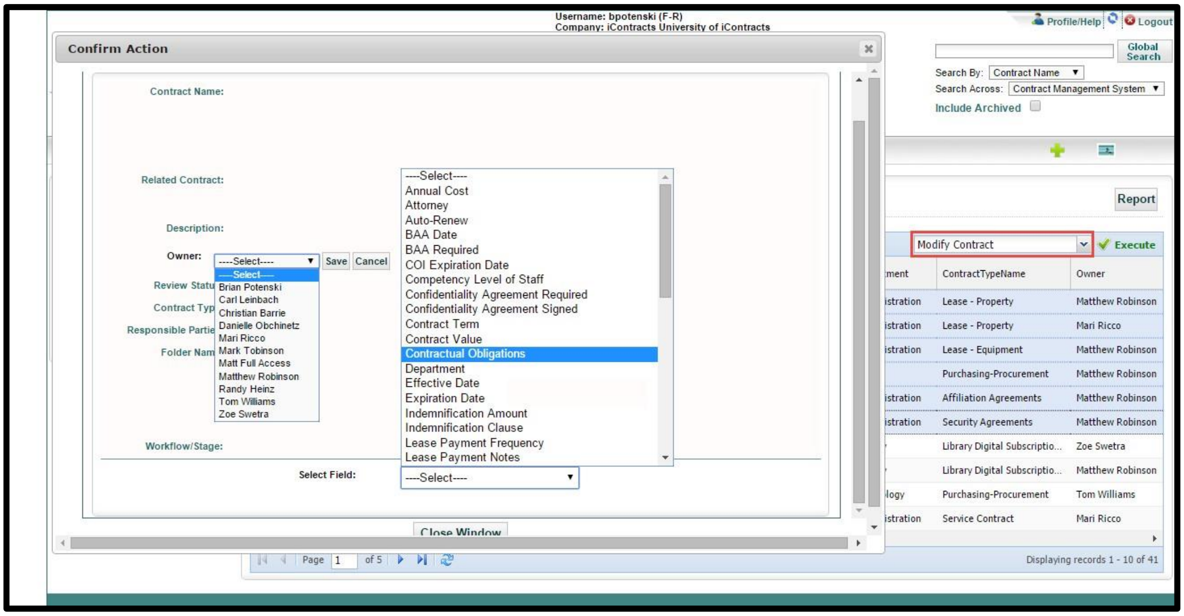


Select the Copy Contract Action from the list of available Actions to copy the data from one contract to create a new record in the system. You also have the option to copy the documents from the original contract.

Unlike the other Contract Actions, you can only Copy **one** Contract at a time.

Modify Contract

The ***Modify Contract*** action allows you to change common data fields across multiple contracts without entering each one individually. From this area, you can change the data in those contracts to the same value.

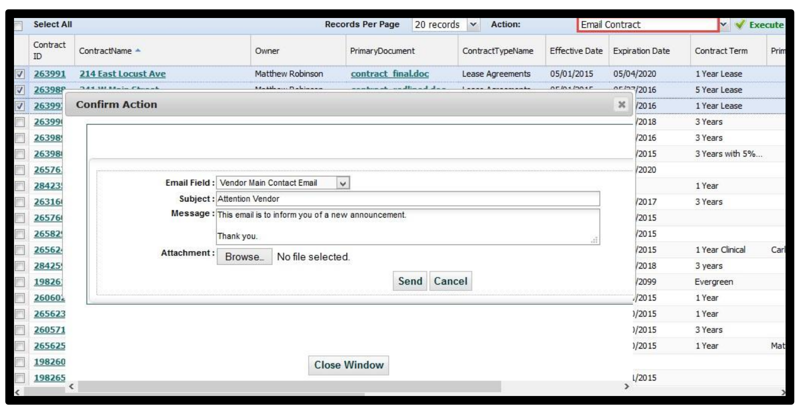


Tip: *This makes it easy to transfer ownership of a set of contracts, or change common dates, without needing to download/run the Bulk Loader. You first create a Contract View, then Select All to Modify them.*

From the Modify Contract interface, select the data you are going to change across all the contracts selected in your grid. When finished, select the ***Close Window*** button at the bottom of the window.

Email Contract

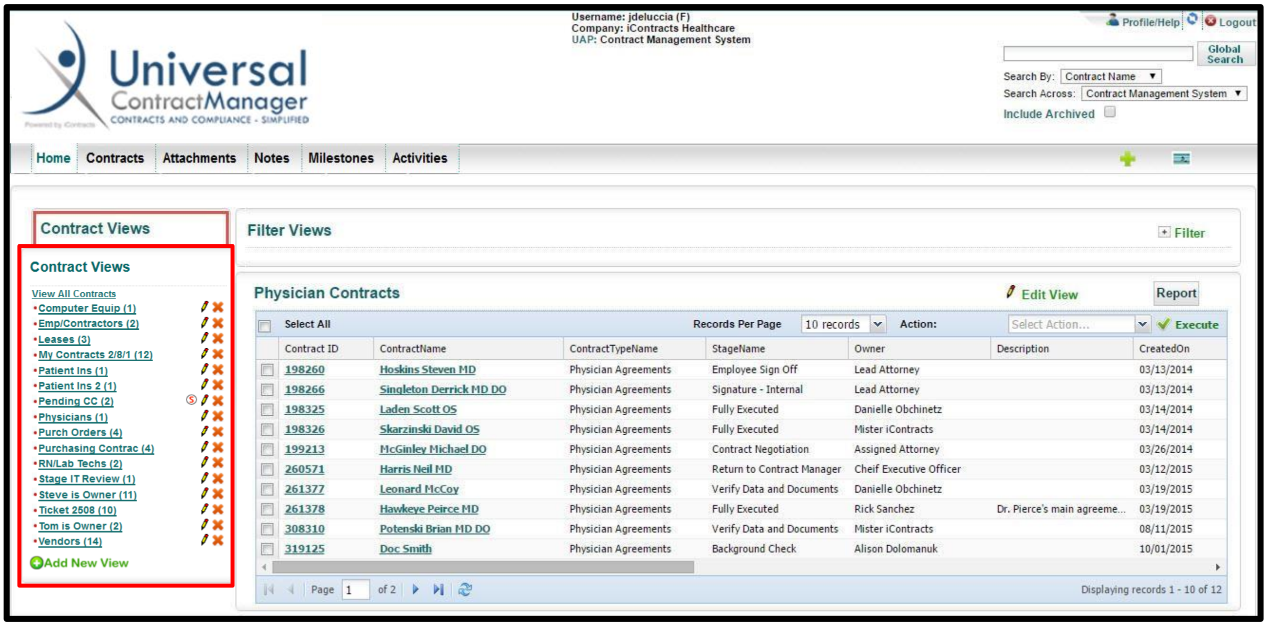
This function allows you to send the same email to multiple recipients using an Email field from within the contract Summary tab. In this example, we are sending an announcement to multiple vendors using the field called *Vendor Main Contact Email*.



Create Corresponding X Records

Choosing this action will prompt you to add the **same** *Attachment*, *Activity*, *Milestone*, or *Note* to a set of contracts. Once you select one of these four options, the corresponding interface will appear after clicking the OK button.

Creating a View



Views are customizable real-time queries that can be set up for either a one-time use, or named, saved, shared, and used repeatedly. Views narrow and simplify a list of contracts and show specific fields pertaining to the task or goal of the search criteria. To create your own Views, click on the **Add New View** button on the bottom of the *Contract Views* area. This section talks about Contract Views, but other view types (such as Attachments or Milestones) are set up in a similar manner.

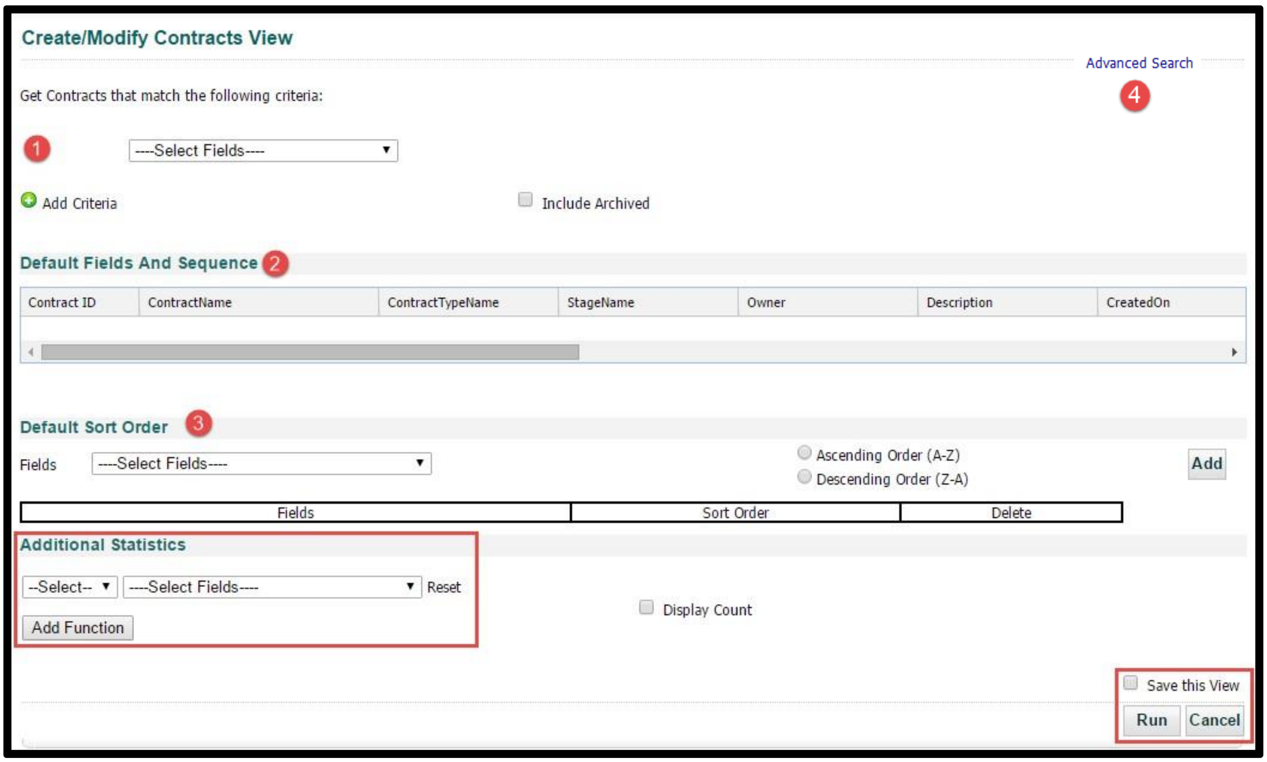
Keep in mind when working with Views:

- **To display a Saved View, click on its name in the list.**
- **To edit a Saved View, click on the pencil icon to the right of the view's name.**
- **To delete a Saved View, click on the X to the right of the view's name.**
- **The (#) next to the Saved View's name shows the number of matching contracts.**
- **The 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 (intentionally or not), 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 icon, you can see who is the view's author.**

  If YOU are the author of a View and Share the View, you will not see this icon.
- **To create a report, or export data to a spreadsheet, click on the *Report* button on 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 Advanced Search (explained later in this section) 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 which field(s) you would like to run a query on and the *criteria for that search* (including Archived contracts if desired),
    - Click **+** *Add Criteria* to expand the criteria list for additional fields.
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.

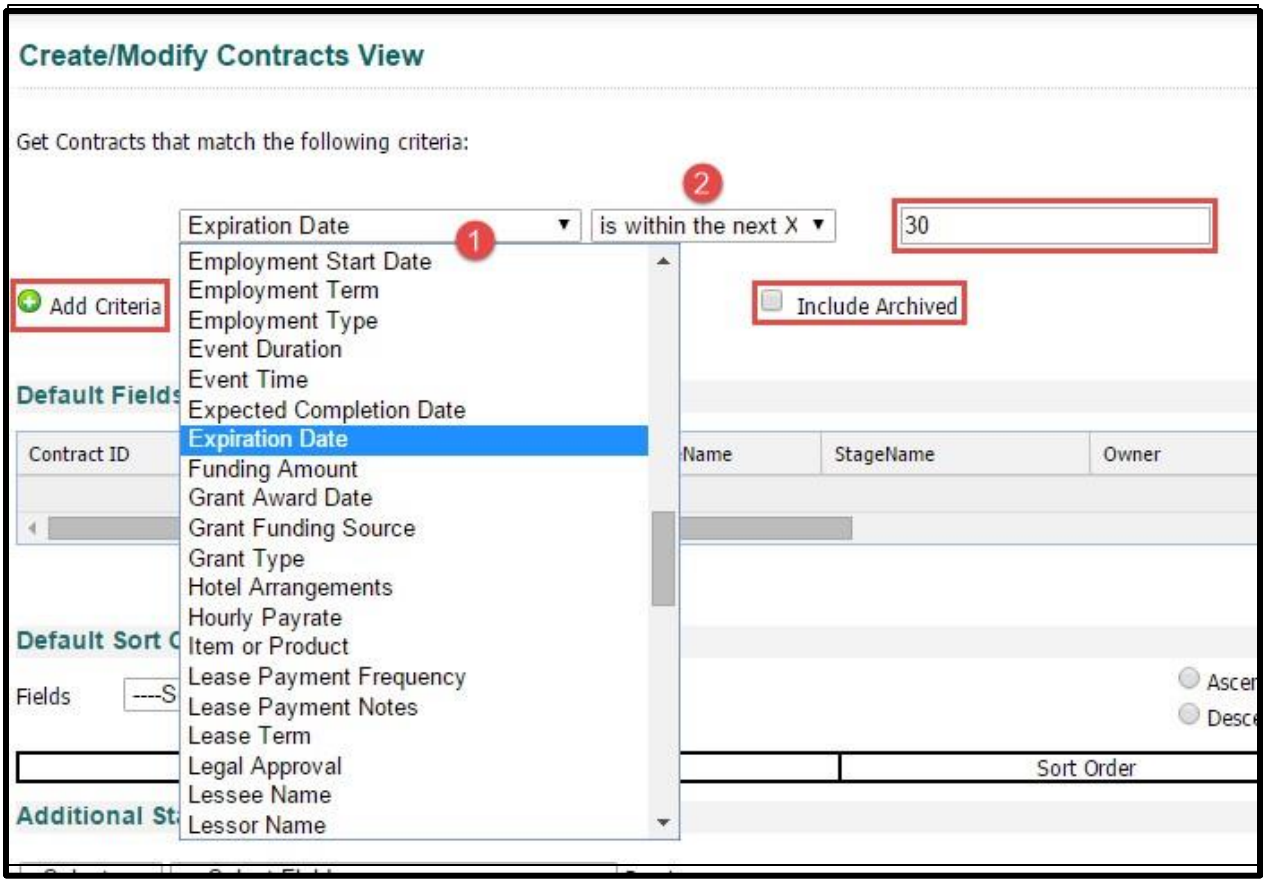


4. The optional ***Advanced Search*** link adds the ability to insert left and right parentheses so that you can *define multiple and/or searches* for the system to understand how it should interpret what you're really asking it to show.
    - See the section on "**Advanced Searches**" (click on the underlined link) for a more detailed explanation on this functionality.

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*). This is called a **Simple Search**.

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



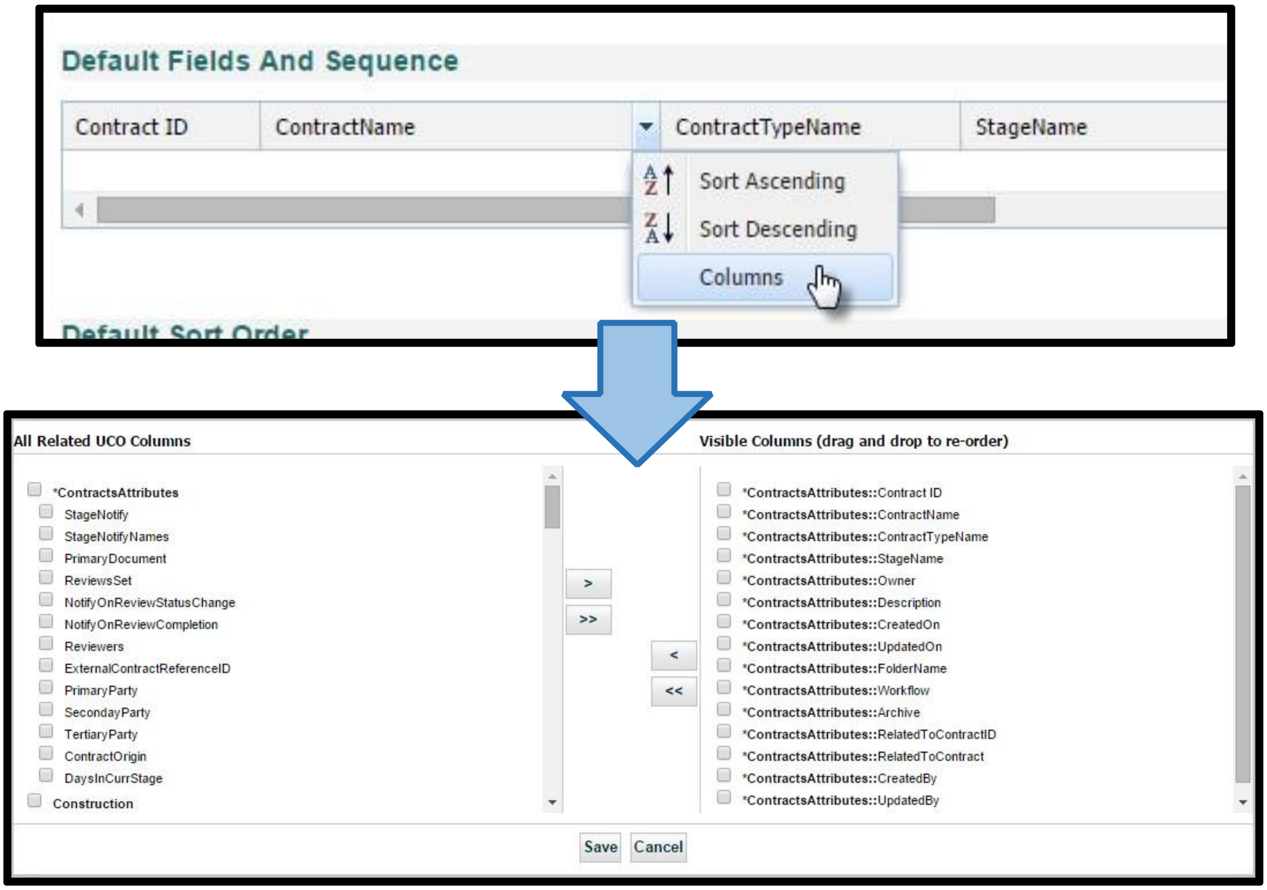
Some modifiers will prompt you for more information. For instance, "is within the last/next X days" will have another area open to the right of the modifier so you may tell the system how many days you would like to run the query on. Text searches (such as "contains") open an area to enter the search phrase.

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 which have **both** conditions true. Choose "or" to show the contracts which have either condition true.

Note: *Currently, choosing both **AND/OR** with multiple lines of criteria in a Simple Search will not work properly since the system is not looking at this as a hierarchy but rather all criteria simultaneously.*

Defining Default Fields and Sequences

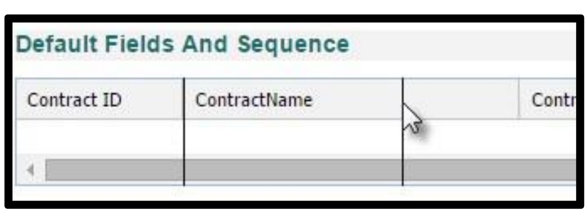
This area determines what Columns will appear in the Grid when you run your View. The easiest way to navigate this area is to simply choose from any of the Column headings the *Column Selector* and choose the option for *Columns*. A window will appear for you to check off which fields to appear in the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



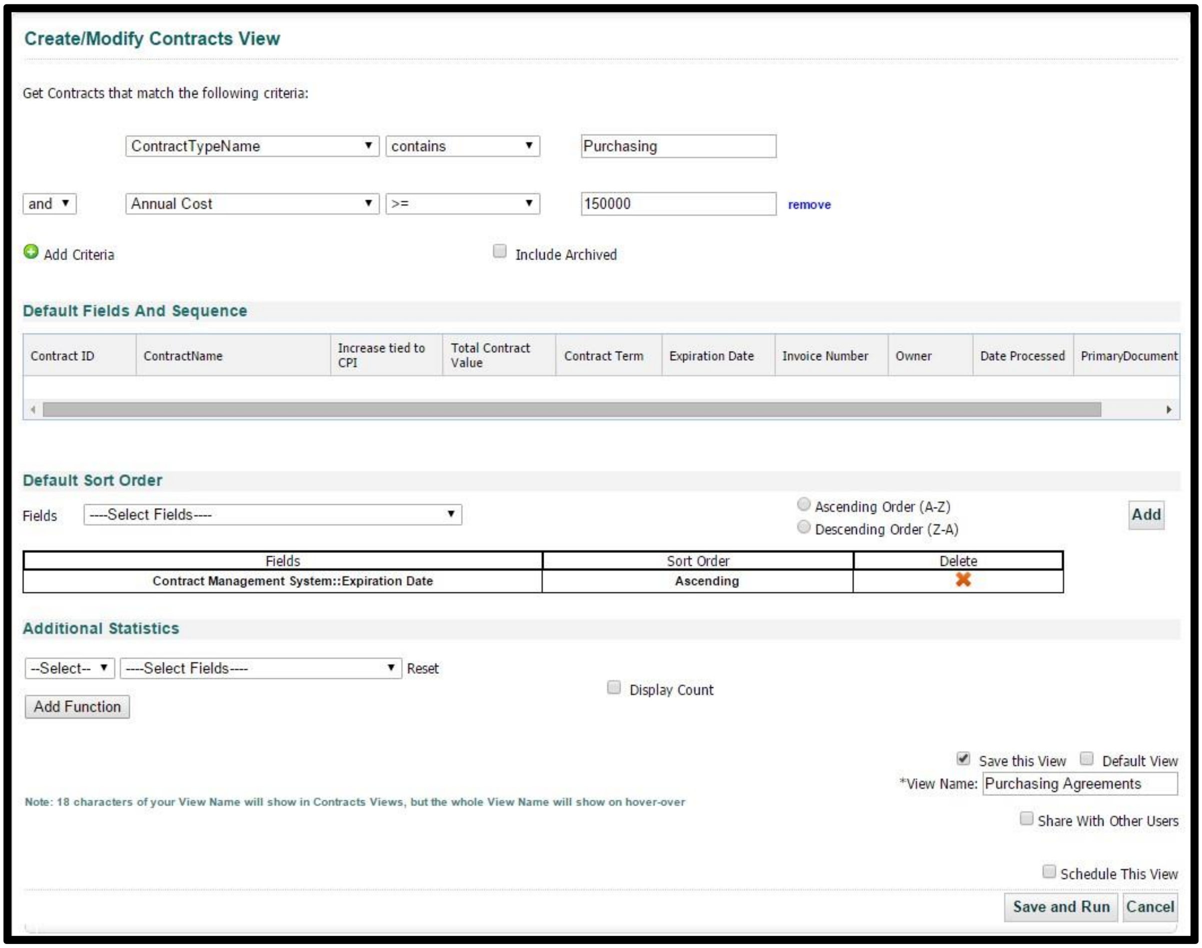
For more information on using this Interface, see the section: **[Working with the Grids]** by clicking on this link.

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.



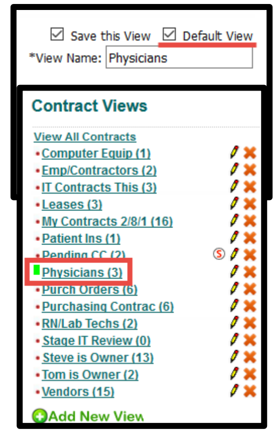
Shown below is a *Completed View* screen. This view has two lines of criteria, the relevant columns and their order, an ascending sort by Expiration Date, and the option chosen to *Save this View* for repeated use.



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 at least $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.

Default Views

If you would like the Contracts Tab to run a Custom View instead of displaying the full listing of all Contracts you have permissions for, then check off the *Default View* checkbox.

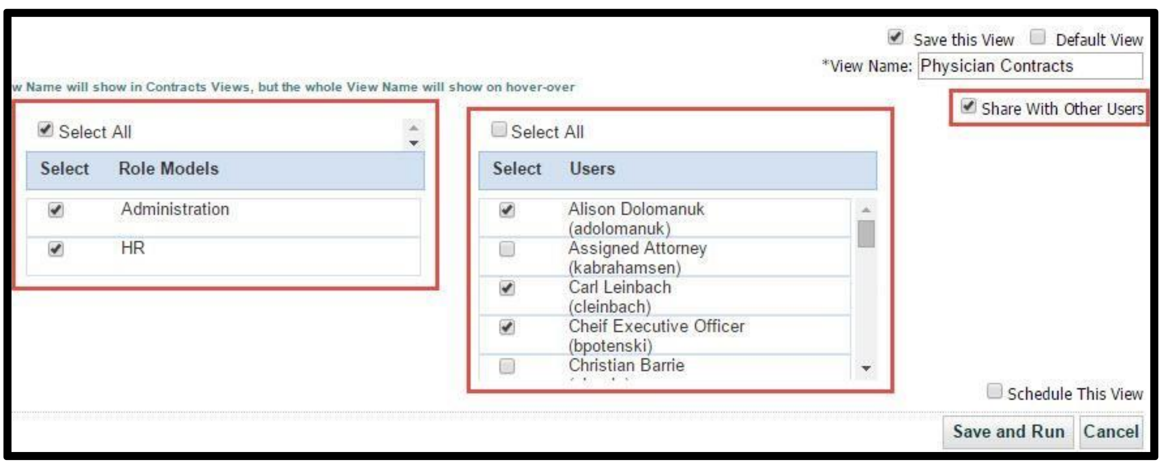


Your Default View will have a **green** square next to it instead of a **red** dot to indicate that this is your Default View.

Tip: *If you set a Default View you can still view all contracts by clicking on the link "View All Contracts" at the top of your Views list. You can also remove a "Default View" by unchecking the box the next time you edit the view.*

Share Views

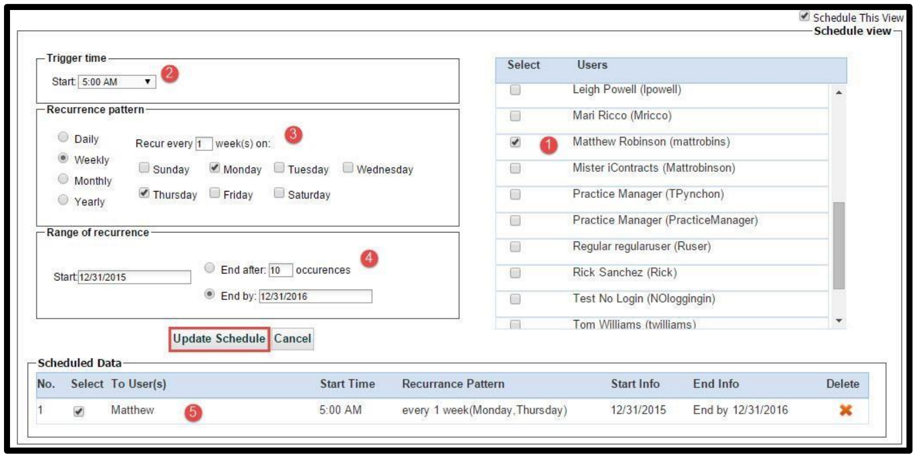
You have the ability to share any of your saved views with other Users in your system. Check off the option to "*Share With Other Users*" from within the Edit View screen and select the User(s) you would like this to be shared with. If your Administrators have set up security using Role Models, you can also share your Views with entire groups of Users that are following those role-based permissions.



Using the *Select All* checkboxes will select everyone in the corresponding DropDown List.

Be aware that the Users you share this view with may see a different number of Contracts than you in the results. This is because the View will run based on their individual or Role Model-based permissions.

Scheduling Views

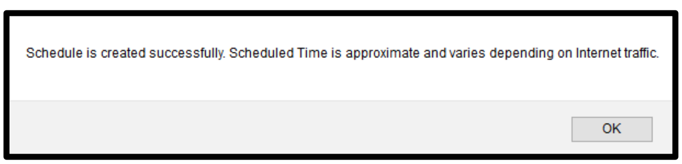


If you would like to schedule a View to be sent as a CSV file by email on a certain schedule, check on the option to *Schedule This View*. This will attach the same report you would create from the **Report** button in a Grid to an Email and send it to the User(s) you assigned. Keep in mind that Users receiving these reports will get **your version** of the report since this is attaching the report based on ***your*** Security Profile. This means, that some users may see contracts that they <u>normally may not have folder permissions</u> to view in their own Contract Views.

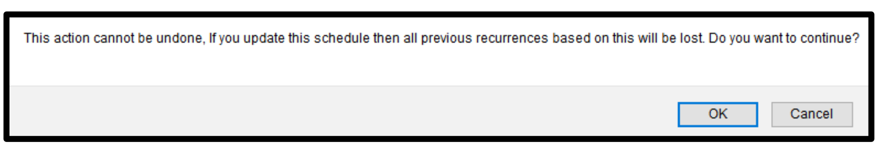
<u>To Schedule a View</u>:

- ☐ Check the "*Schedule This View*" checkbox to activate.

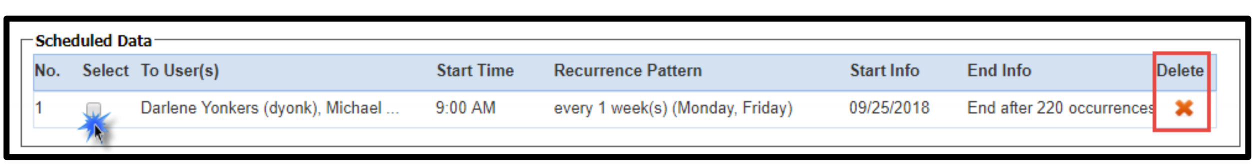
1. Select the User(s) you would like to receive this report.
2. Select the Trigger time the view should be generated and emailed.
3. Select the Schedule (Recurrence pattern) this should occur on.
4. Select the Length (Range of recurrence) of the scheduled view.
5. Click "Add Schedule" to create the Scheduled View.



You can later go back and "Update Schedule" by clicking on the Select checkbox.

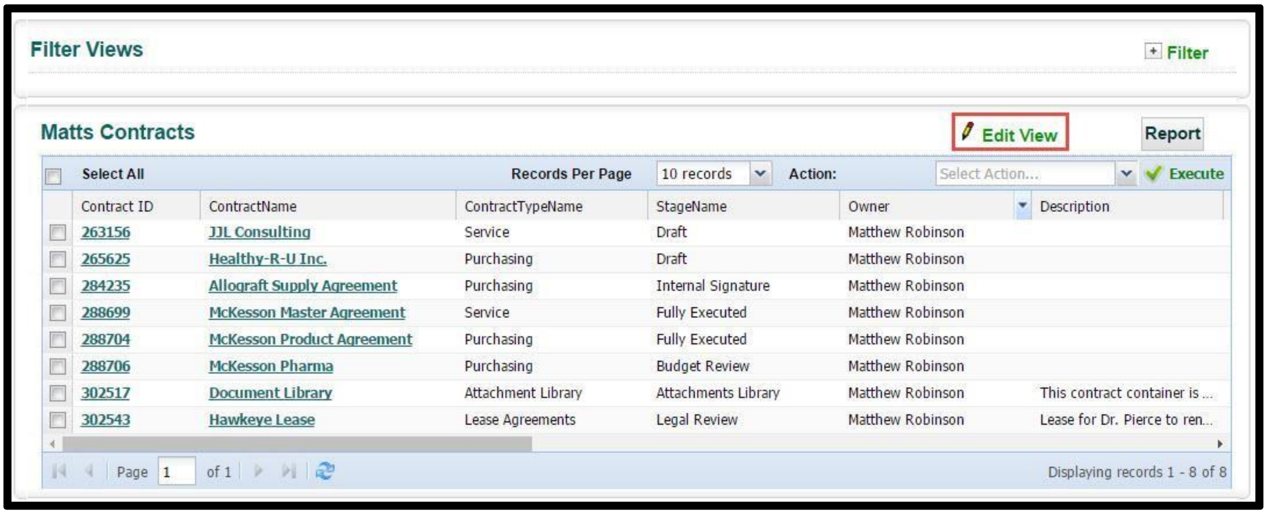


When finished, click **Save and Run**. If you ever need to remove a scheduled view before the recurrence ends, click the red **X** under the Delete option for that Scheduled View.



Always click the "**Save and Run**" button to update any changes your made to a *Modified Contract View*.

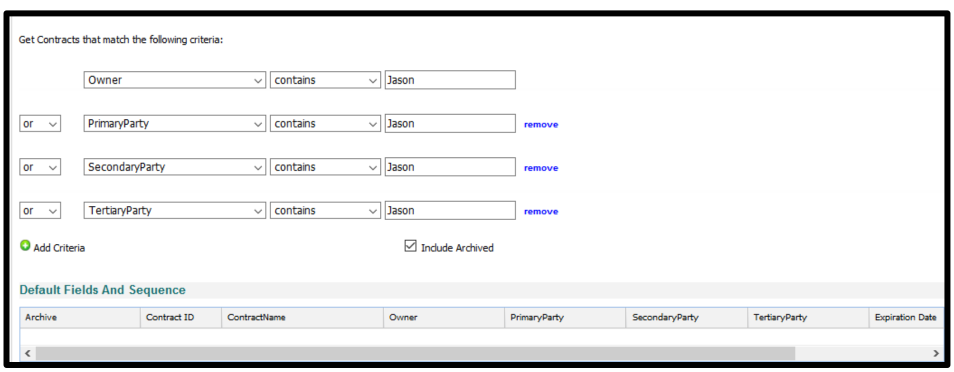
Editing Views



Editing your View is an easy way to create more views without going through all the steps of starting a new view from scratch. Any views not currently displayed can be edited by clicking on the icon on the *Contract Views* list.

An Example of a practical need for editing views: You already have a report based on someone being the Owner of several Contracts. You would like to know which Contracts have another specific User as Owner or Responsible Person. Use the view you already have to create a new view. Once the original view loads on the screen, select **Edit View** at the top right of the grid and to the left of the *Report* button. (Note: System Administrators may limit access to either of these functions). This will take you into the *Modify Contracts View* as detailed on the previous pages. However, the screen will already be filled out for the View you have selected for editing.

At this point, change the criteria as needed to find the Contracts you need to report. You should also edit the *Default Fields and Sequence*, as well as the *Default Sort Order* and *Additional Statistics*.



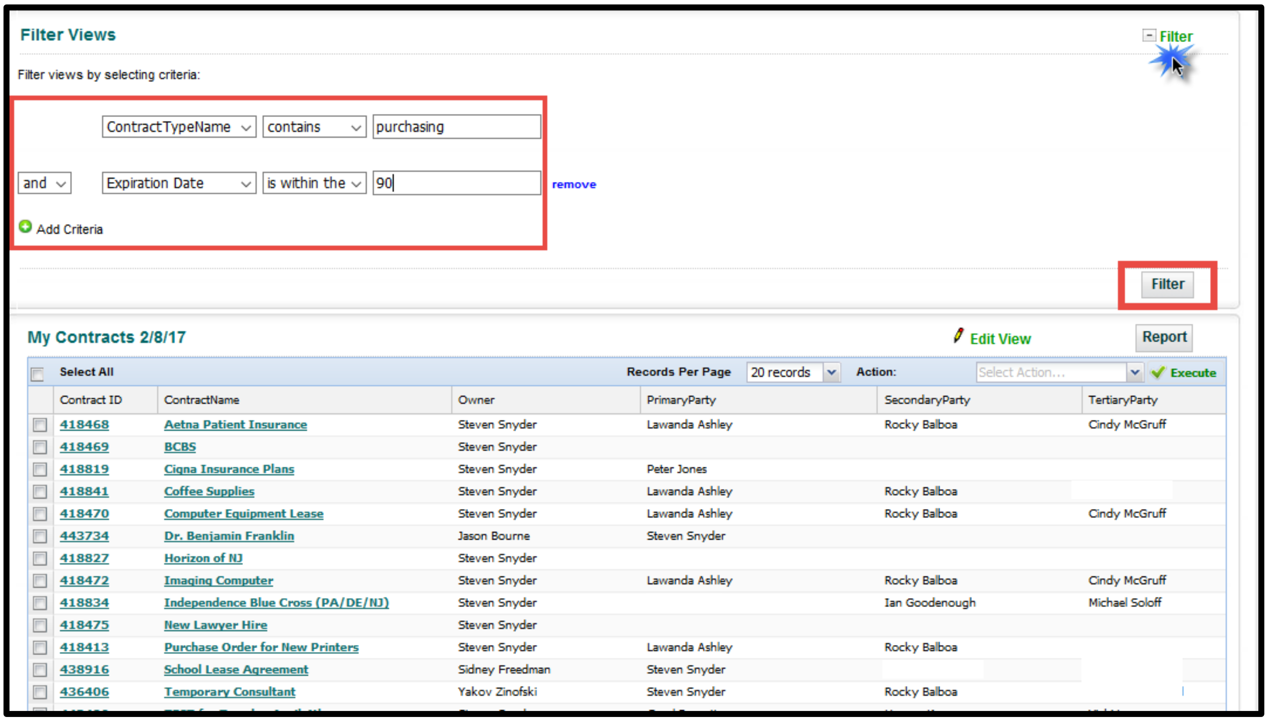
Once you have finished editing the view, give this view a **new name** (delete the current View Name and type in a new View Name). This will create another view in addition to the one you already have saved. If you simply want to edit the current view, leave the View Name as is and the current view will just be modified. Click the **Save and Run** button to store any changed view settings. If you don't change the View Name, you risk overwriting the current view.

Remember that checking on the ***Save this View*** is the only place to permanently change the sequence of the fields that show on screen when the view is run. Otherwise, the changes will be temporary and will be lost once you select a new view, a different tab, refresh your screen, or logout of the system.

Filter Views

You can create **Filter Views** by adding some *temporary criteria* to existing custom views. To do this, click on the **Filter** button above the Report button at the top right of the grid. This will open up a Drop-Down list with the data fields in your system. You can then use the same types of operators on the data as when Editing/Creating a View.

When you are finished adding criteria, click the lower **Filter** button to execute the function and your grid results will refresh.



Advanced Searches

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.

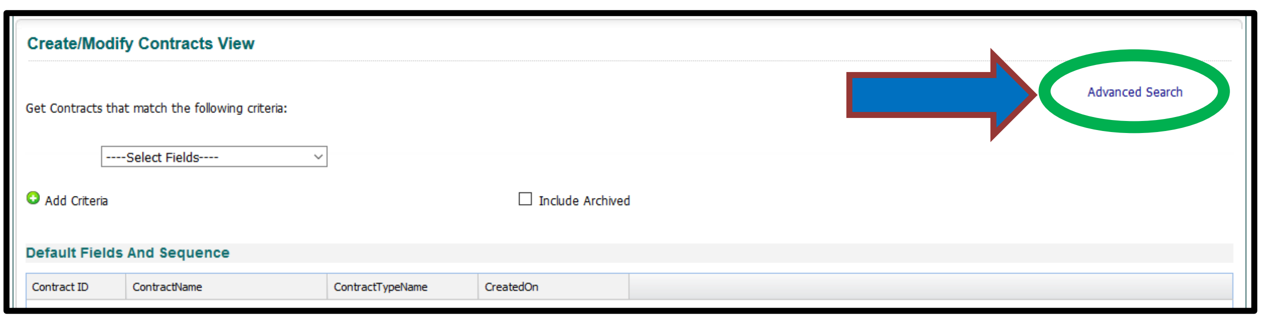
In a Simple Search, if you create your Contract View and want to use both ANDs and ORs as "connectors" within the same View, you might get "other than expected" (what some would consider flat-out-wrong) results since the system wasn't interpreting your criteria correctly.

Using left and right parentheses in an Advanced Search, 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.

All of your existing Contract Views will continue to work as they always have, without making any changes to current Saved Views.

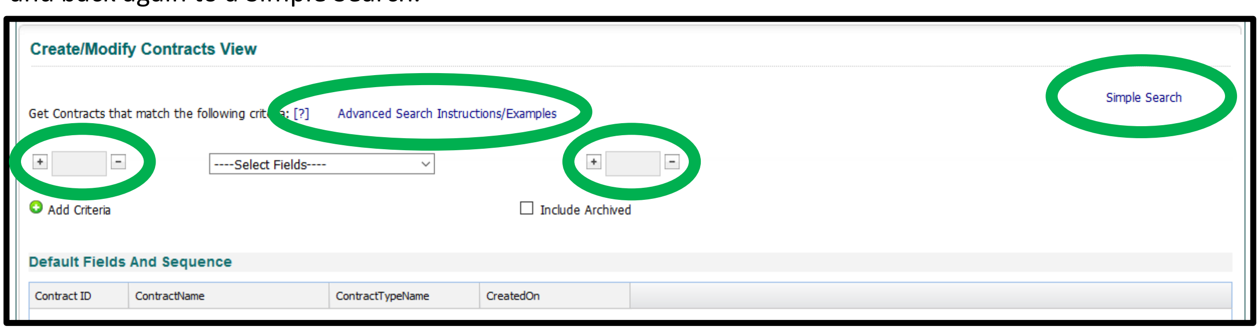
If you do have a need to use this ***Advanced Search*** function, then you'll find the words "Advanced Search" to the right of where you will setup your Create/Modify Contracts View.

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



To Advanced Search:

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.

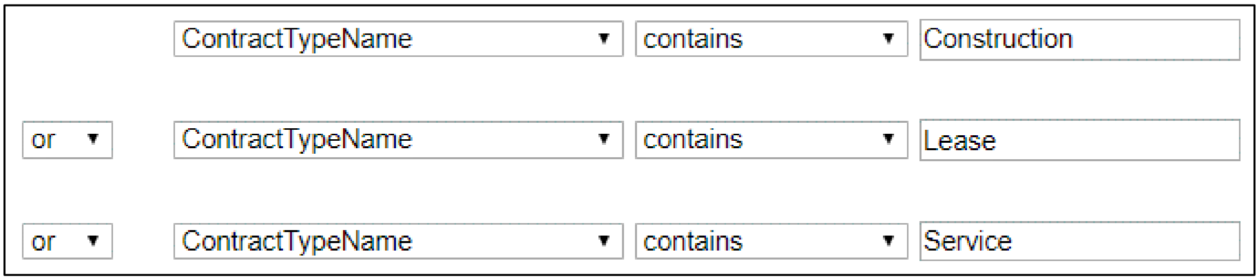
☞ See the example on the next page.

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

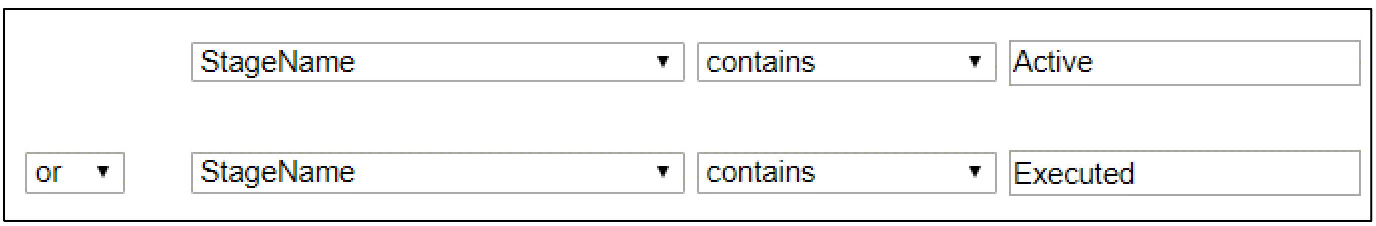
Example: I want a report of all Construction, Lease, and Service Agreements that are Active (Stage is Active **OR** Executed) **AND**

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

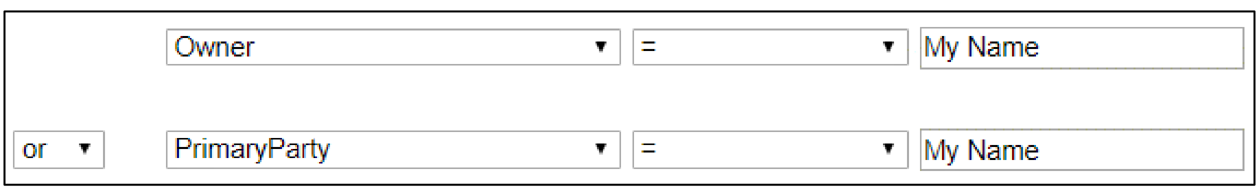
First, I want to report on the Contract Type criteria:



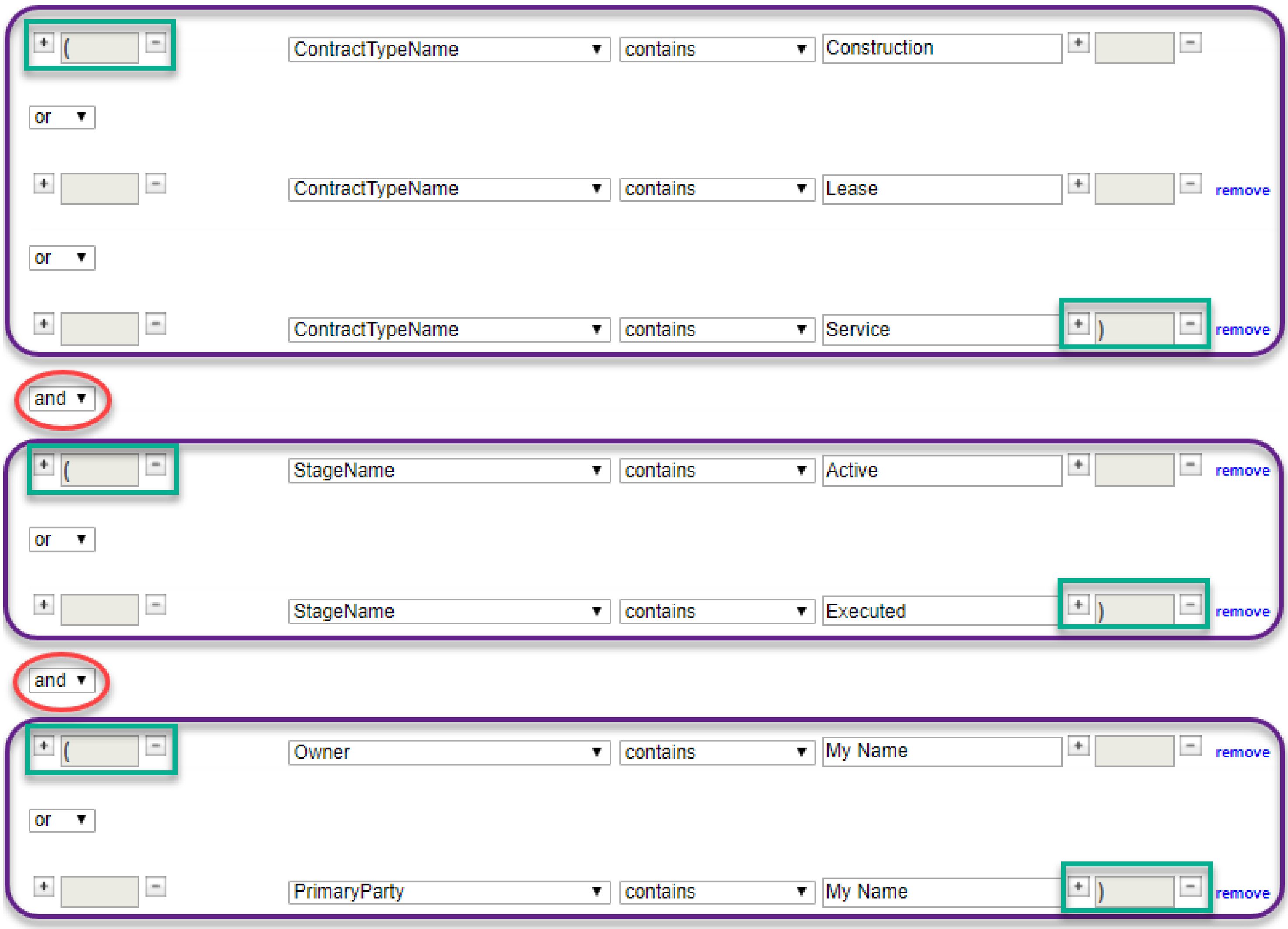
Then, I want to report on the active contracts within this set:



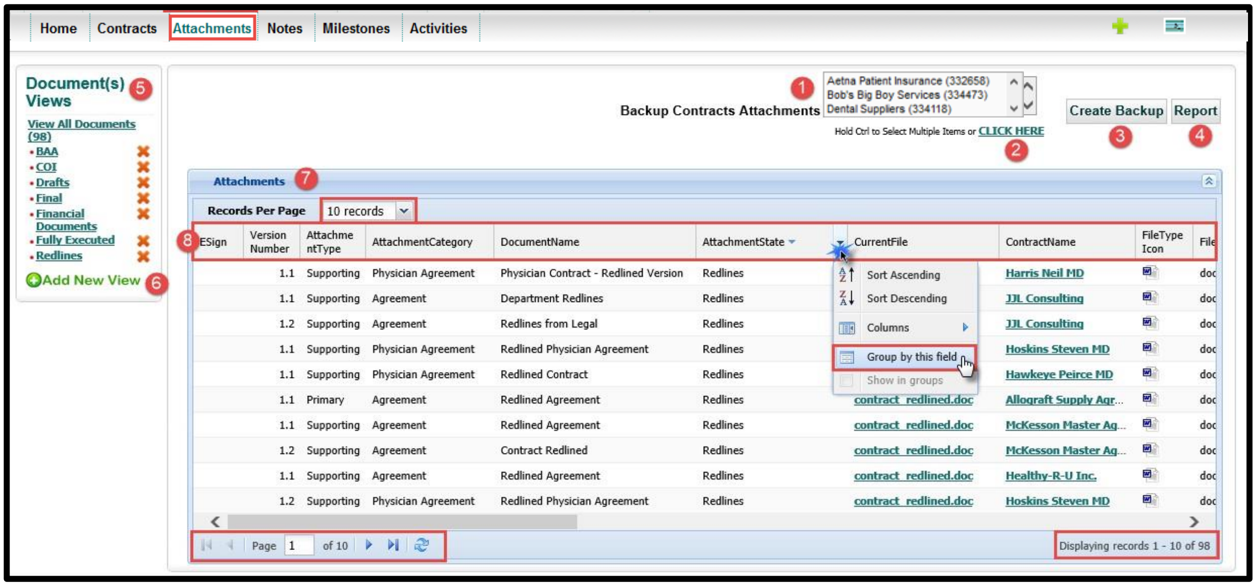
Finally, I want to look for my name on the contract:



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



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.



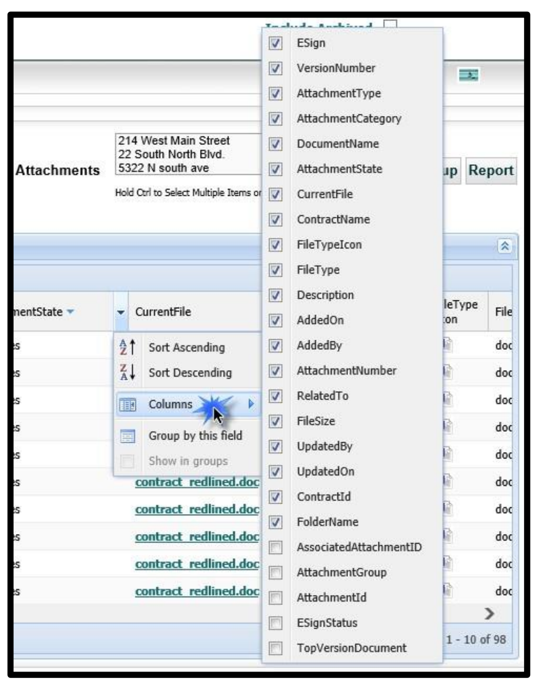
1. Backup Contracts Attachments Area
2. Backup Contracts Selector
3. Create Backup Button
4. Report Grid Contents Button
5. Document Views Area
6. Add New View Button
7. Attachments Grid
8. Attachments Columns

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 it does on 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.

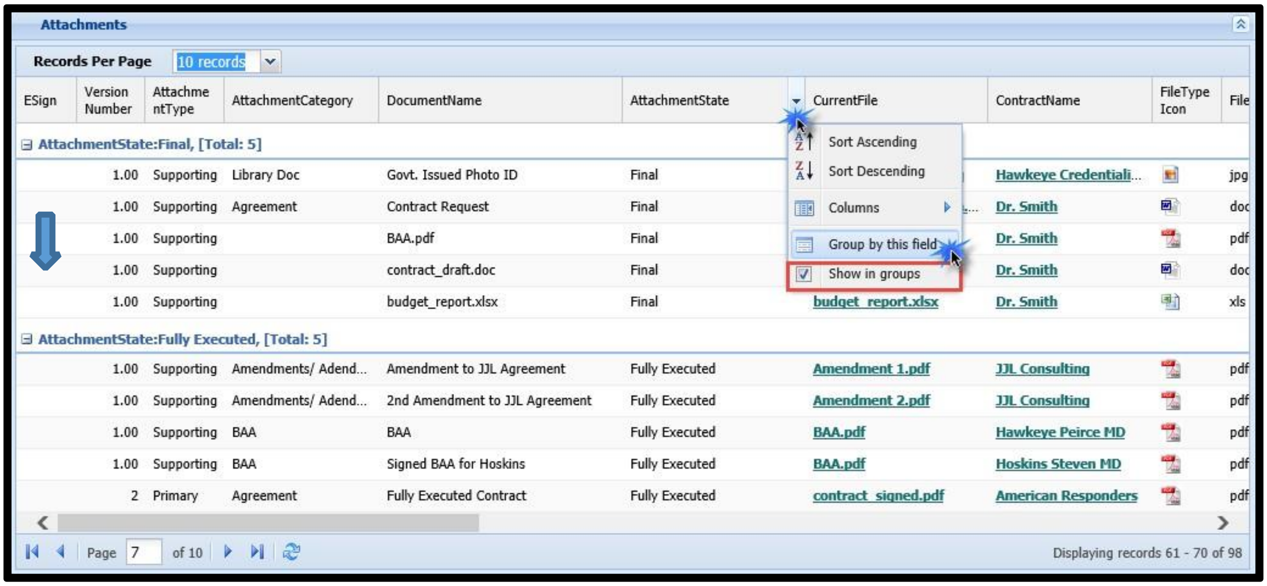
Uncheck any areas that you do not want showing in your grid and drag-and-drop column headings to a desired location.



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 blue arrow inside image). This will allow you to hide unnecessary documents.



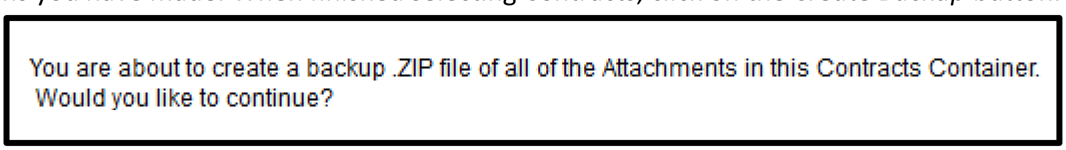
ESign	Version Number	AttachmentType	AttachmentCategory	DocumentName	AttachmentState	CurrentFile	ContractName	FileType Icon	File
⊟ AttachmentState:Final, [Total: 5]									
	1.00	Supporting	Library Doc	Govt. Issued Photo ID	Final		Hawkeye Credentiali...		jpg
	1.00	Supporting	Agreement	Contract Request	Final		Dr. Smith		doc
	1.00	Supporting		BAA.pdf	Final		Dr. Smith		pdf
	1.00	Supporting		contract_draft.doc	Final		Dr. Smith		doc
	1.00	Supporting		budget_report.xlsx	Final	budget_report.xlsx	Dr. Smith		xls
⊟ AttachmentState:Fully Executed, [Total: 5]									
	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."

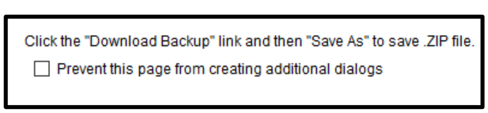
Backup Contract Attachments from Attachments Tab

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 <u>CLICK HERE</u> 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.



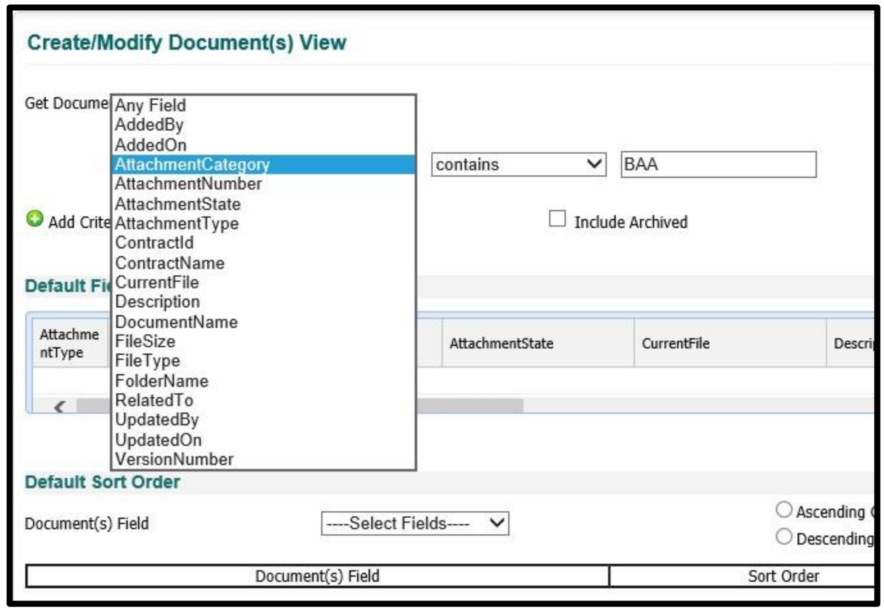
This will present you with a couple of pop-up boxes letting you know this action will create a Zip file that you can then download. Click **OK** to continue (or **Cancel** to exit). After that, the option to <u>*Download Backup*</u> appears between the *Create Backup* and *Report* buttons.



Click this button to download your Zip file.

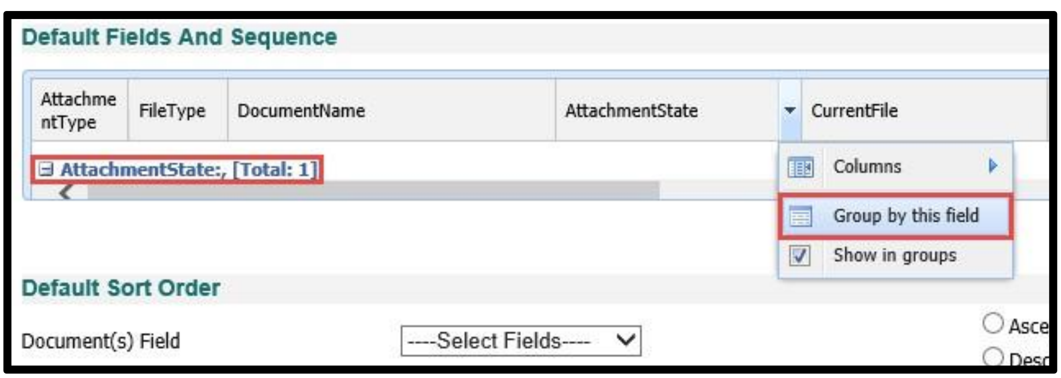
Attachment Views

From this area, you can create on-screen Views of subsets of Attachments based on any of the data points from the Attachments Tab. Attachment State and Attachment Category will 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 like.

From inside a view you can also choose to Group by a 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.

<u>Tip: Rearrange Your Columns</u>

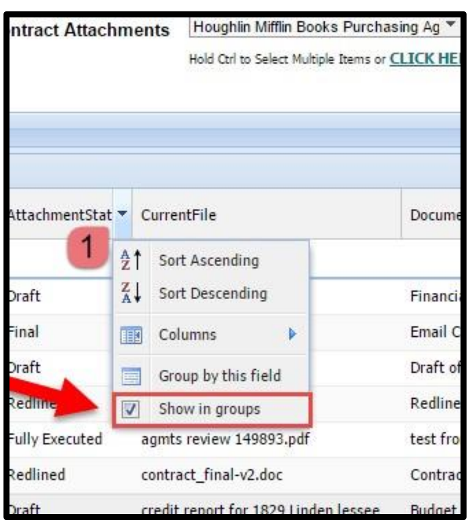
The first thing you will want to do will be to arrange your Columns so you see the data that is relevant to you.

<u>Tip: Group Attachments by Category, Contract, or State</u>

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*.

<u>Tip: Turn off Grouping for a cleaner looking grid</u>

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*.

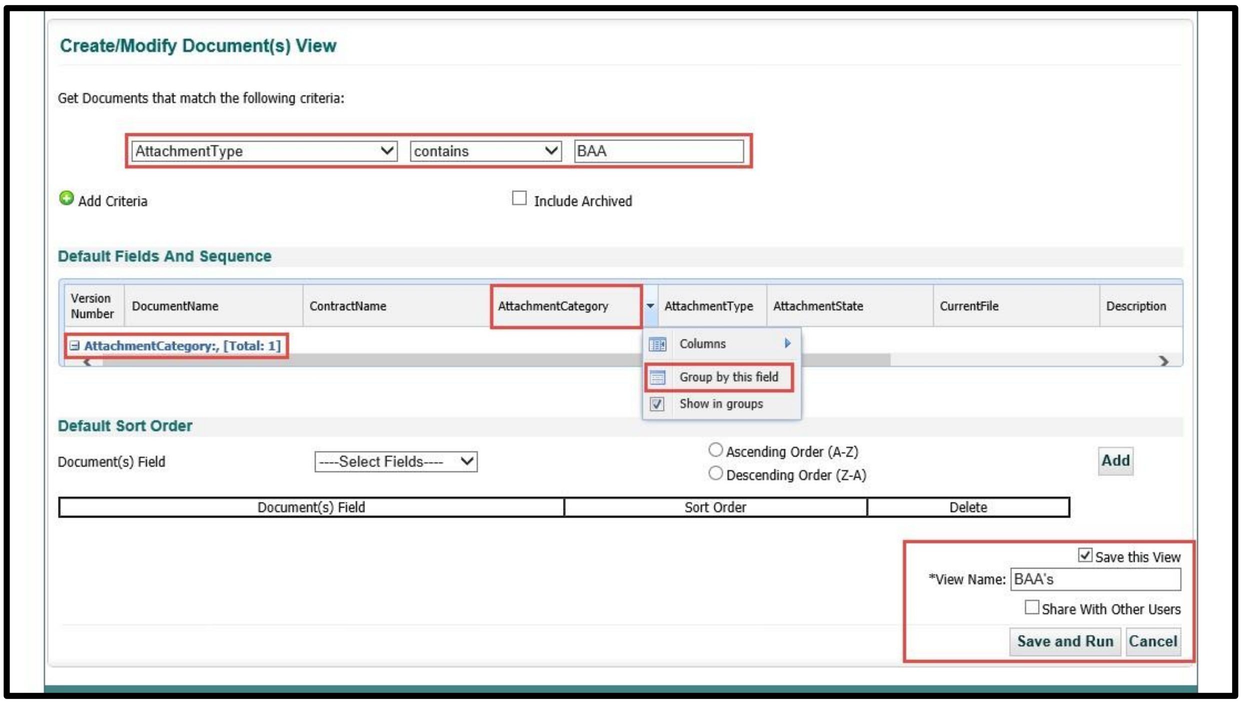


Examples of Practical Use:

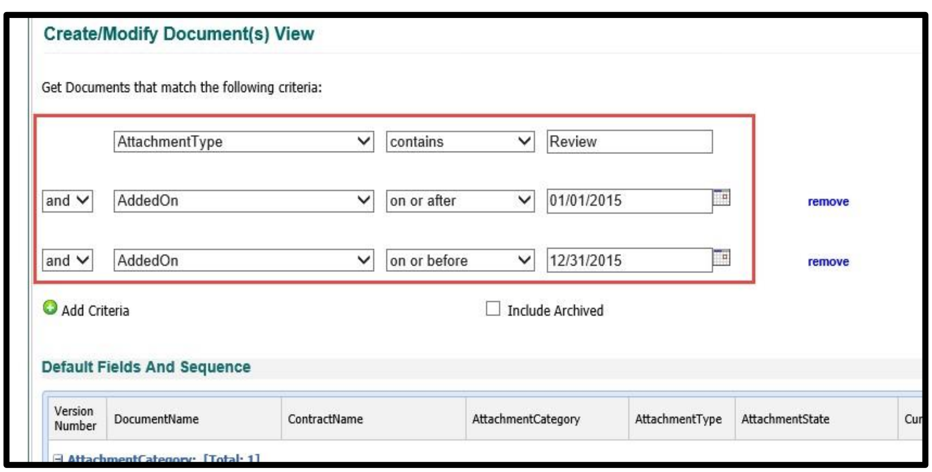
Some Views that we feel may likely be useful for you include:

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.



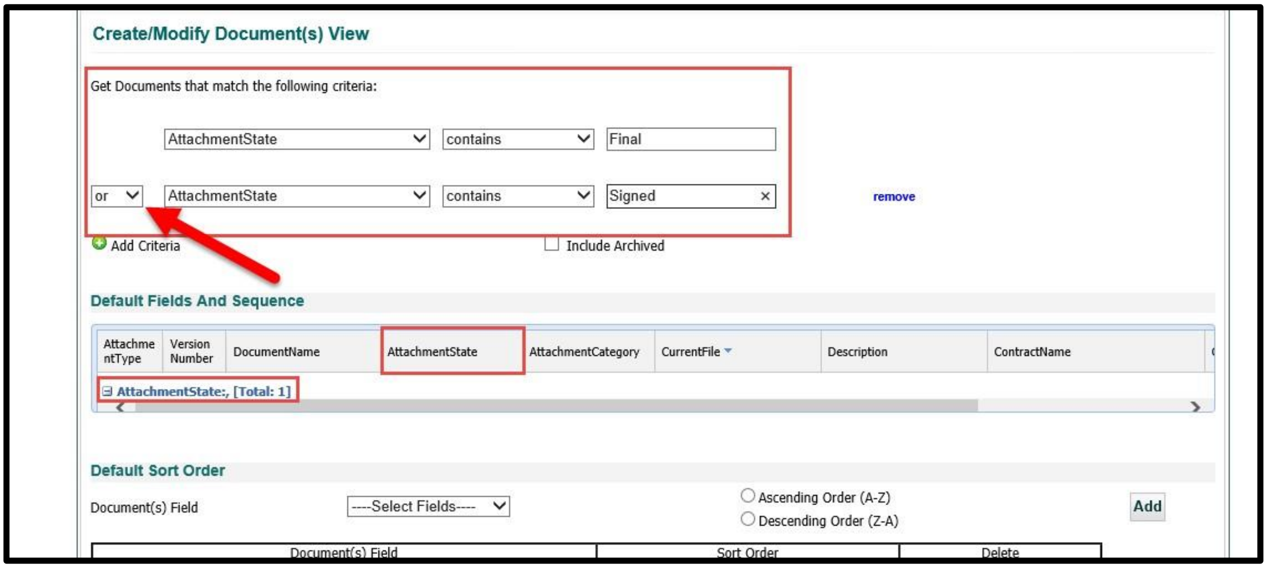
Yearly Contract Reviews (by Category)



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 2015.

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.



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.

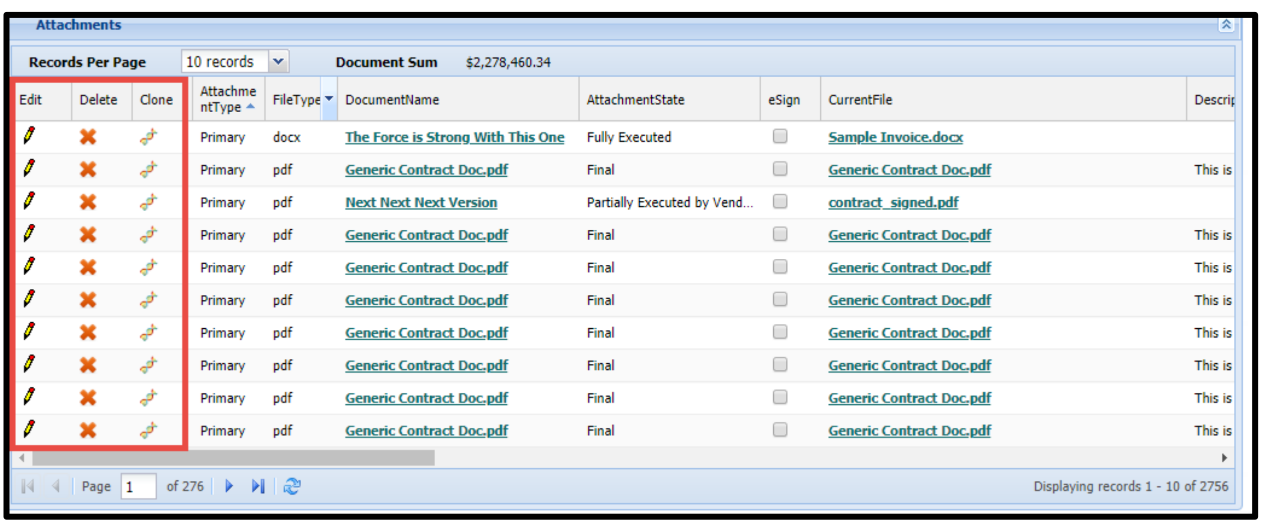
Note: Make sure to use **OR** *instead of* **AND** *for this View.*

Edit, Delete, or Clone Attachments

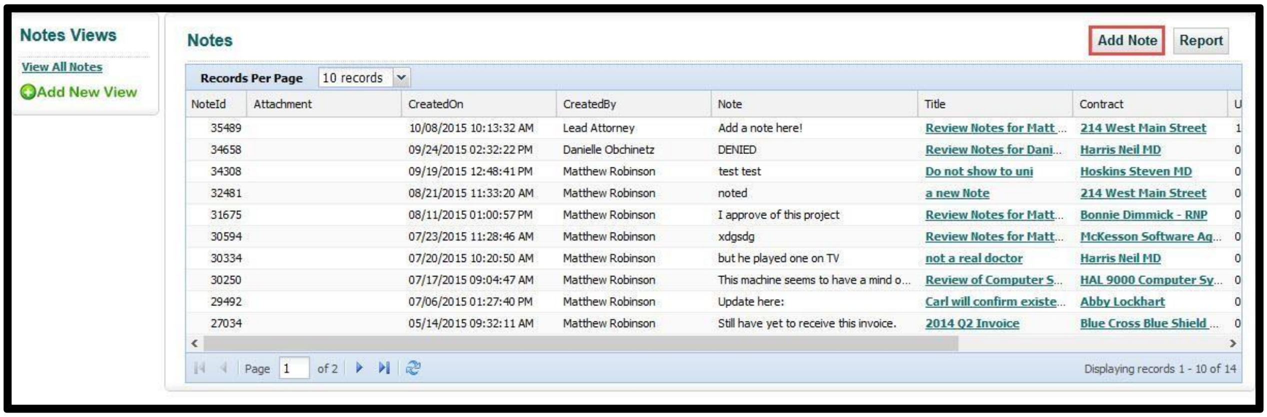
If security access has been granted (by an admin), you may have the ability to **edit** a document, **delete** a document, or **clone** (duplicate) a document.

Editing a document is modifying the Document Title, Version, Category, State, Description, or Promote/Demote to Primary or Supporting. You are *not* editing the contents of a document.

See the *Deleting an Attachment* or *Cloning an Attachment* topics (click on the link) under the **Contracts Ribbon: Attachments Tab** section for more information on how to delete or clone a document.



The Enterprise Ribbon: Notes Tab

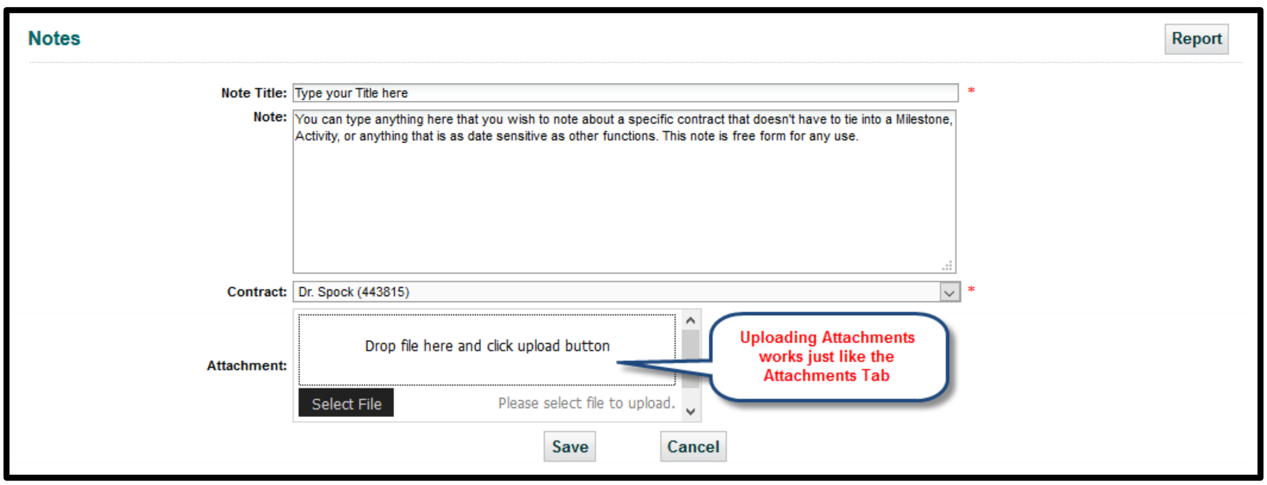


On the **Notes** tab, you can access any Notes associated with all of your available contracts in the system.

The *Views* associated with the Notes section operate in the same manner as Views in other Enterprise Ribbon Tabs. The data available for criteria in those views pertain exclusively to the Notes section. For instructions on setting up Views, click this link to see the chapter for **Creating a View**.

Creating a Note

To add a note into your system from the Enterprise level Notes Tab, click the **Add Note** button. In this area, you will add a *Note Title*, populate the body of the *Note*, and select the *Contract* to be associated with this note. You also have the option of adding a *document* to this note using the **Select File** button.

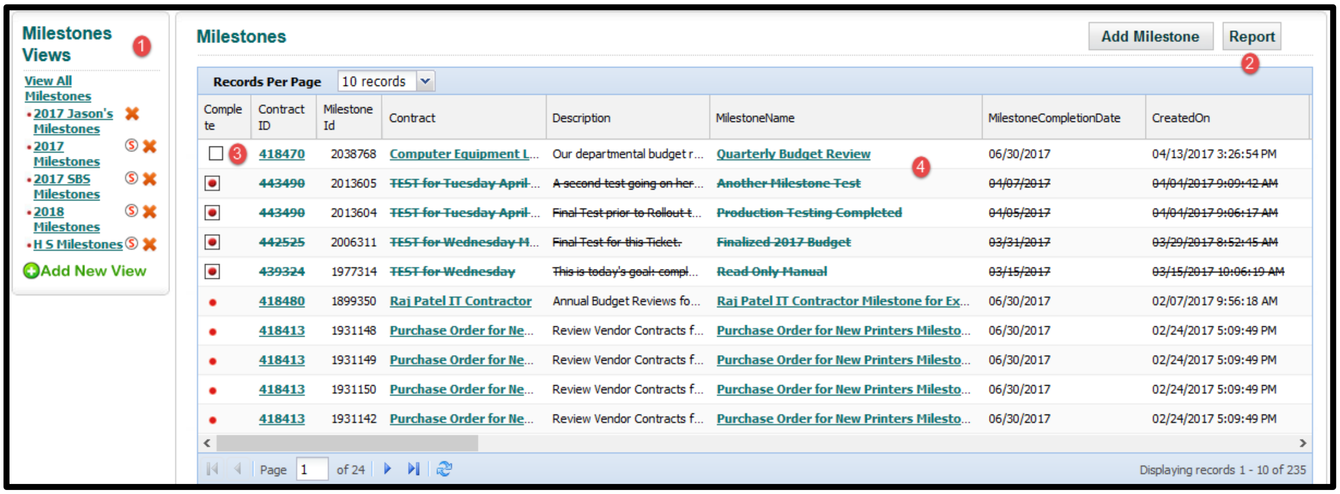


Make sure to click the **Save** button to update your note when finished.

Editing or Deleting a Note

To update a note, click on the *Title* within the Notes grid. Then click on the pencil icon to edit, or the **X** icon to delete.

The Enterprise Ribbon: Milestones Tab



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

✓ *You can arrange and sort the column headings as you see fit - some of the columns shown may not show on your screen, depending on how you arrange the Milestones Grid.*

The **Milestone** tab will show you past, present, and future Milestones (date-based events) associated with all available Contracts in your system. You can add or modify an unlimited number of saved searches (Milestone Views).

You can export to Excel the contents of the grid in the regular Milestones tab or a Milestone View by clicking on the *Report* button (if visible, depending on your permissions).

Click on the *Add New View* button to create a new Milestone View and follow the directions for **Creating a View**, by clicking on the link.

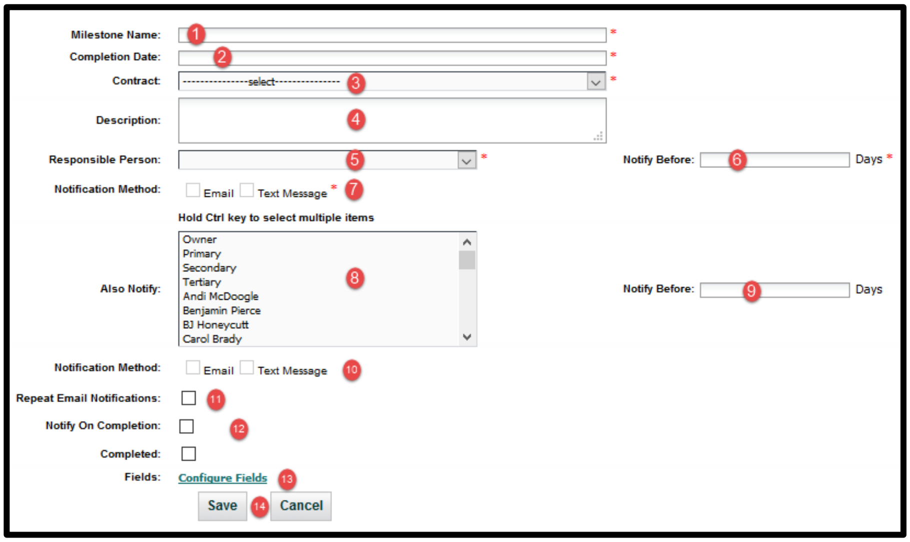
The *Completed* checkbox will only be available to you if you are the Responsible Person listed on the Milestone. Otherwise, the checkbox will show as a **red dot** (if incomplete) or a boxed **red dot** (if completed). You will also see the completed Milestones displayed with a ~~strikethrough~~ font.

Working with Milestones

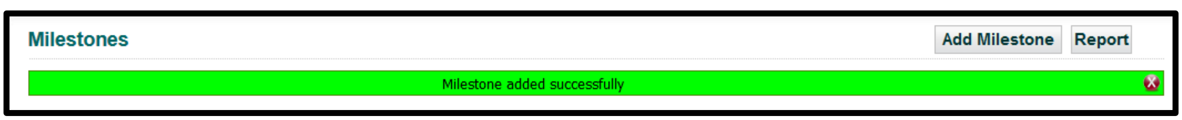
If you need to be notified before a certain date, add a **Manual Milestone** using the *Add Milestone* button. In this area, you are able to determine what you would like to name the Milestone, the Date the Milestone should be completed, and which Contract Container the Milestone is associated with in your system, as well as a number of other things listed on the following pages.

To Create a Manual Milestone

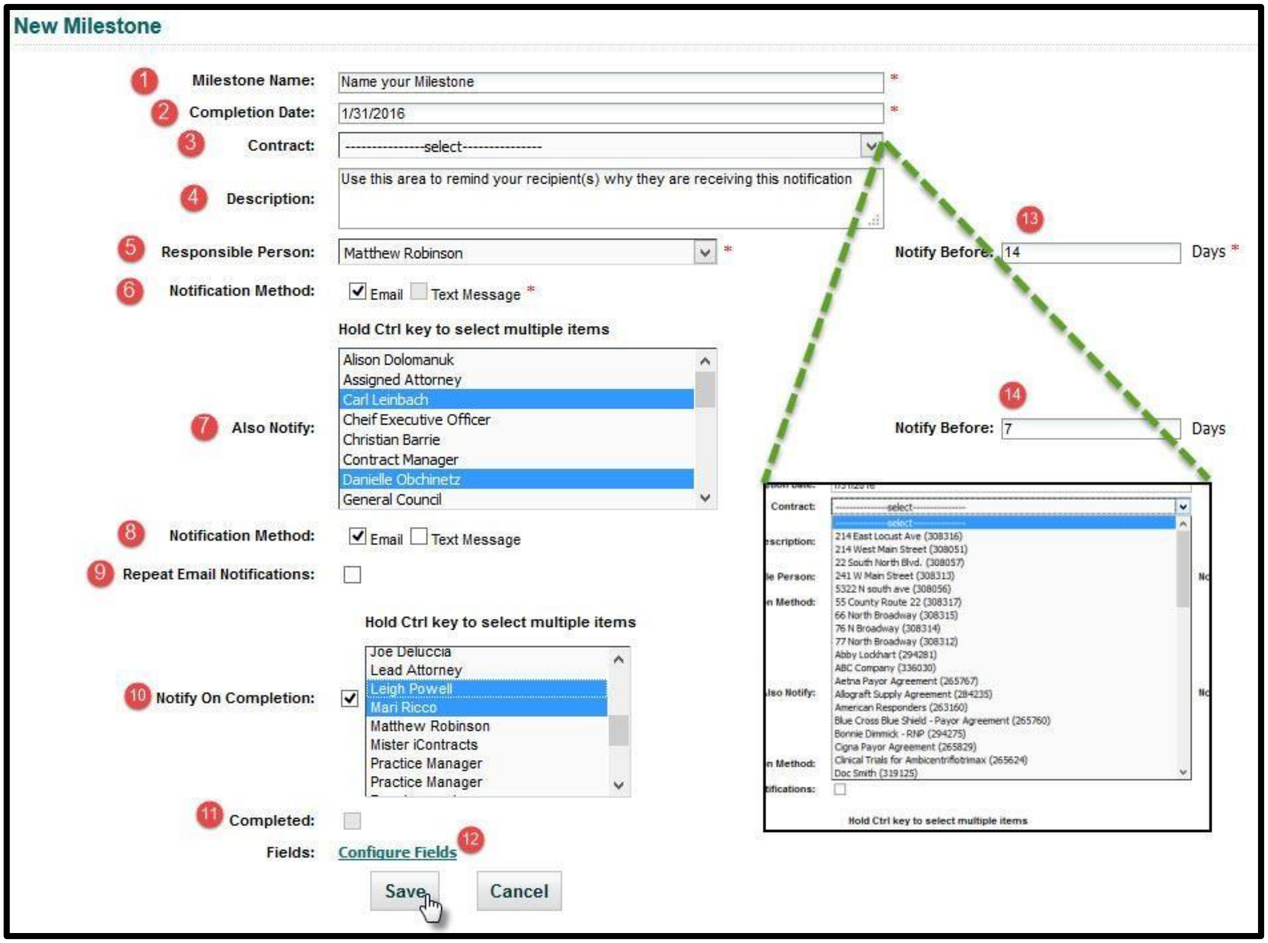
*All entries with * are required.*



1. Name the Milestone.
2. Choose the Completion Date from the calendar.
3. Select the Contract from the drop-down list.
4. Type instructions for the Milestone.
5. Choose the Person to be notified via drop-down list.
6. Choose how many days **Before** Completion Date (0-4000) to Notify
   – OR –
   Choose how many days afterwards (-1 to -4000).
7. Email Checkbox remains unchecked until you select a Responsible Person (#5).
   Currently, you cannot use the “Text Message” option for notifications.
8. Select if any other Users should be included in **Also Notify**. Hold [Ctrl] to select multiple users.
9. Choose how many days before (or after) using the same rules as listed with #6 above.
10. Email Checkbox remains unchecked until you select Also Notify (#8).
    Currently, you cannot use the “Text Message” option for notifications.
11. Decide if these people should continue to receive **daily notifications** until the Milestone is marked completed in the system.
12. Select if and which User to be notified (by email) upon completion of the Milestone.
13. Select what data points should be included with the Milestone Email Notification using the Configure Fields button (see Configure Fields for more detail).
14. Click the **Save** button to generate the Milestone. The **Cancel** button will abandon everything you just did on this screen.
    You are notified of your success.



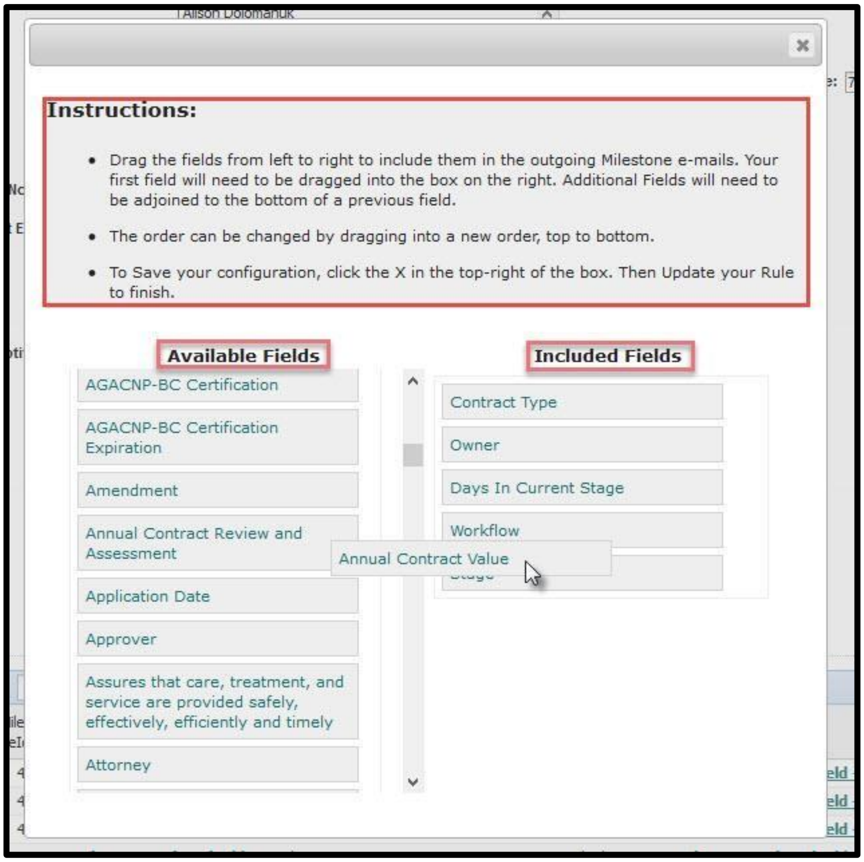
Example Milestone Entries are shown



1. Milestone Name
2. Milestone Completion Date
3. Associated Contract
4. Description/Instruction Dates
5. Responsible Person
6. Notification Method (Automatically chooses Email)
7. Notify Others
8. Notification Method (Chooses Email for you)
9. Repeat Email Notifications
10. Notify Upon Completion
11. Completed Checkbox
12. Configure Fields Link
13. Notify Responsible Person Before (in Days)
14. Notify Others Before (in Days)

Configure Fields

When you click on the optional link to **Configure Fields**, this pop-up window appears. The instructions for using *Available Fields* are contained in the pop-up.



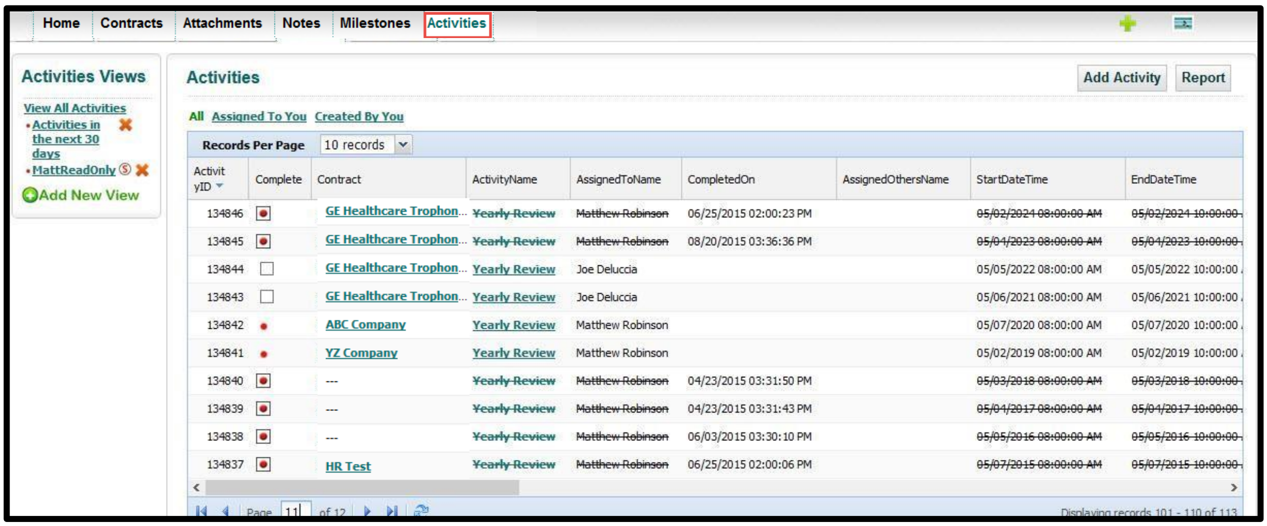
Editing a Milestone

To edit a Milestone in the system, click on the **Milestone Name** in the Milestones grid. This will direct you from your listing of all Milestones into an area where you can see the specific details for the selected Milestone. By selecting the *Edit Pencil* in the top-right of this area, you will be able to make changes to your Milestone as needed using the same procedures as illustrated above.

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.

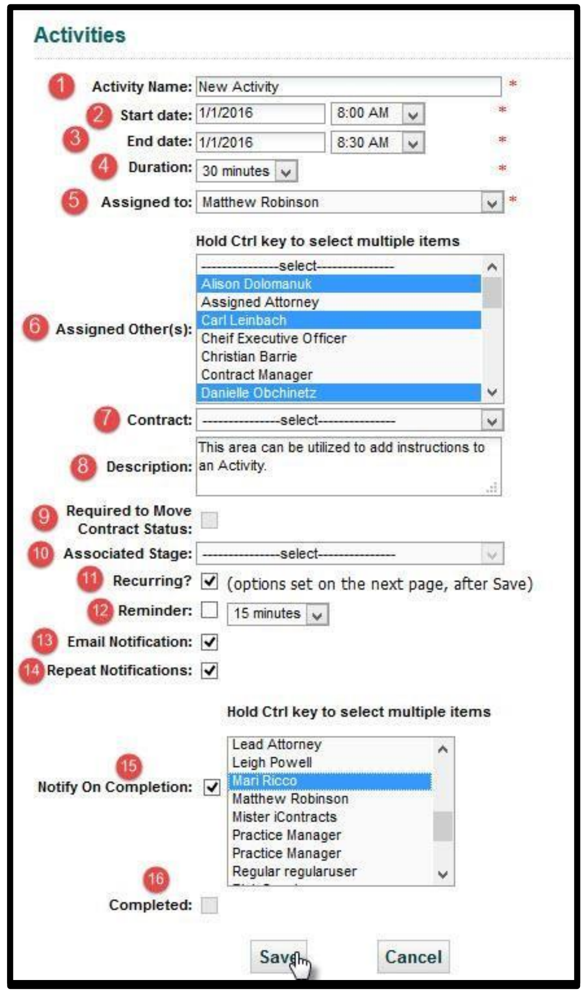
Each User will have the ability to show Activities assigned to them or created by them from the links provided above the grid of Activities.



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.**

Creating a New Activity

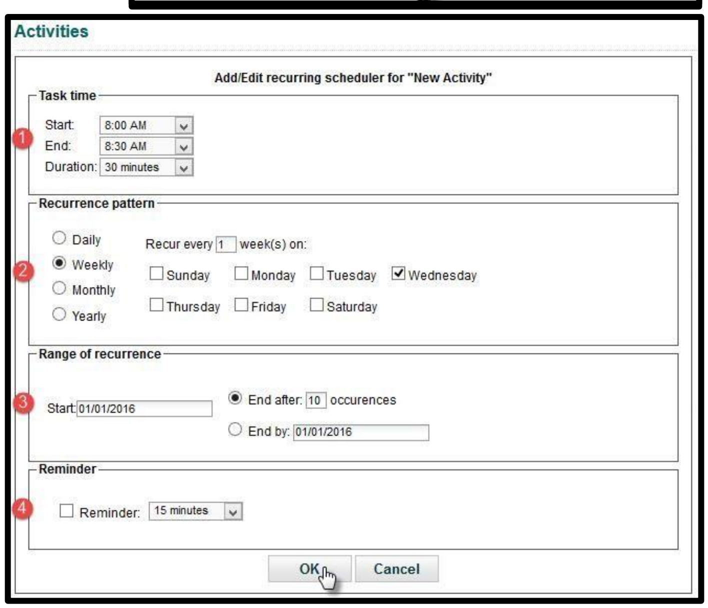


To create a new Activity in your system, click on the **Add Activity** button. In this area, you will be able to configure an Activity to meet your needs by filling out an Activity Name, Description, Start/End date & time, and Assigned User, as well as a number of other items.

*Remember, entries are **required** if there is an * displayed.*

1. Activity Name *
2. Start Date/Time *
3. End Date/Time *(linked to Duration)* *
4. Duration *(auto calculates or you can manually set)* *
5. Assigned to User *(select a name or O/P/S/T user if tied to a contract container too)* *
6. Assigned Other Users *(optional)*
7. Contract Associated To *(optional, except if you pick #10)*
8. Description Area
9. Required to Move Contract Status *(forces Stage change)*
10. Associated Stage
11. Make recurring *(see below if checked)*
12. Reminder Email/Time
13. Email Notifications
14. Repeat (email) Notifications *(daily email reminder until activity has been marked as completed)*
15. Notify Users on Completion
16. Completed Checkbox

Setting Up a Recurring Activity



To set up a *Recurring Activity*, select the checkbox (#**11**) while creating the activity. However, if you are working with an existing Activity, you must select the icon in the Activities grid under the **Recurring** column *(hover your mouse over the icons for their definition)*.

Once in the *Recurring Scheduler*, fill in the four main areas:

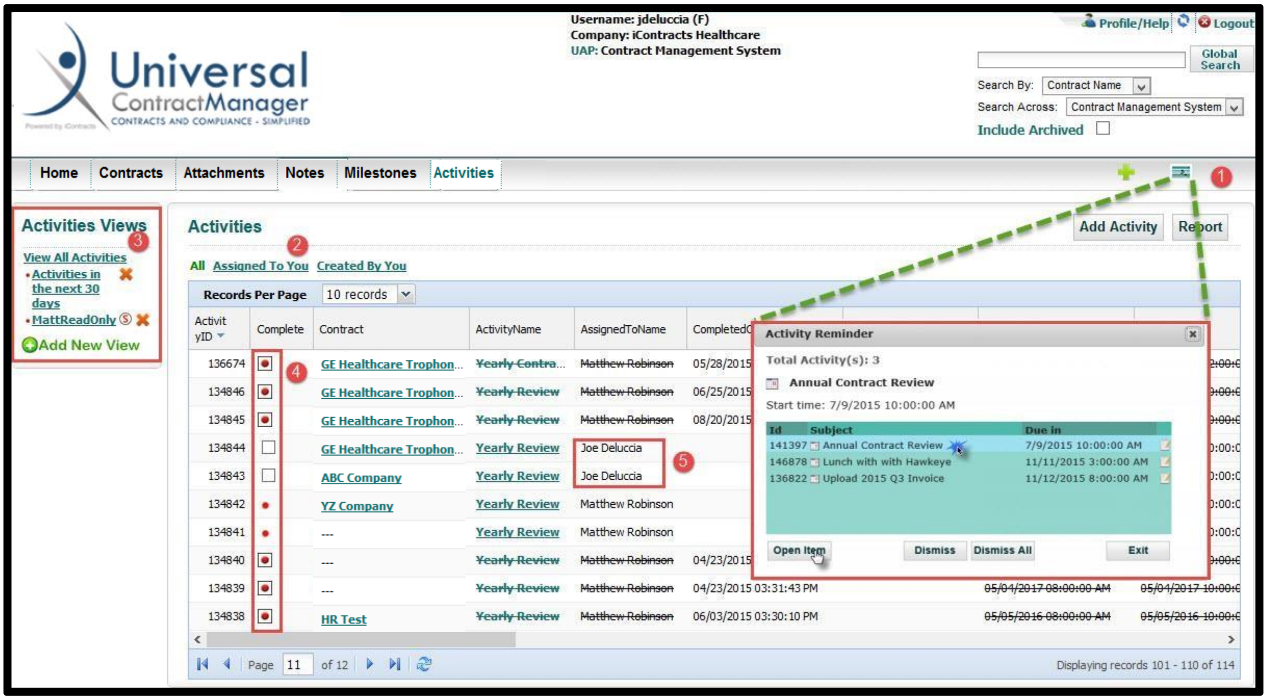
Choose a **1** Task (Start/End) time. Select **2** Recurrence pattern (if Daily, choose Every day or weekday). Set **3** Range of recurrence, then select **4** Reminder before Activity and if so, how much notice. Click the **OK** button to save the activities.

<u>To Edit a Recurring Activity</u>

Click on the icon in the Activities grid and repeat these 4 procedures from the previous paragraph. – ***OR*** –

Click on the to Delete a Recurring Activity. Select One, All, or Future recurrences.

Working with Activities



You can find Activities **Assigned To You** listed in the *Activities grid* five different ways. You may also receive email notifications regarding an Activity which 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 at any time by clicking on this button (that looks like a tiny "AMEX" credit card). Any "*Assigned to Others" users do not see this window.*

   You can open any Activity directly from the *Open Item* button *OR* from this icon to the left of the Activity name (Subject). **<u>BUT</u>, if you click on Dismiss/Dismiss All, the selected Activity/Activities will no longer appear in the future within this Activity Reminder Window.** To close this window, click on the **X** at the top right in the grey title bar or click the *Exit button* at the bottom right.

   Tip: If you click on the icon to the right of the "Due in" date/time, the Activity opens and is displayed in the Edit Activity mode so you can change any information without having to first click on the pencil icon.

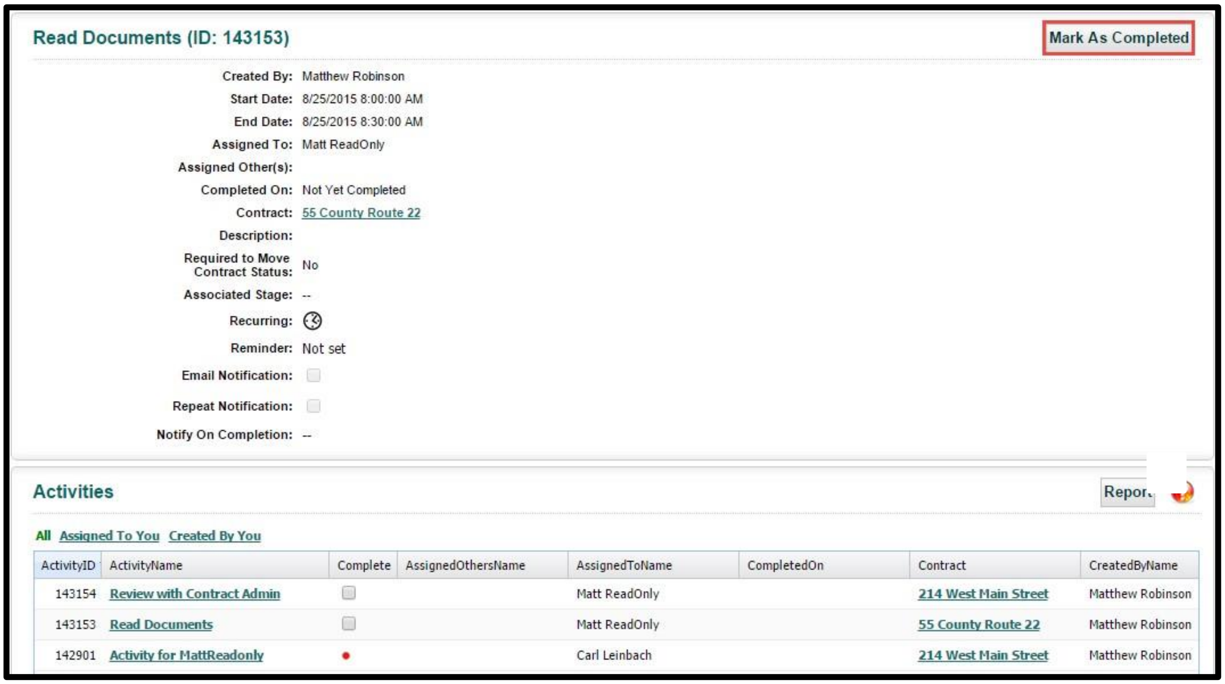
2. Click on the *Assigned To You* (or *Created By You*) link.

3. Create an *Activities View* that identifies you as the Assigned To person.

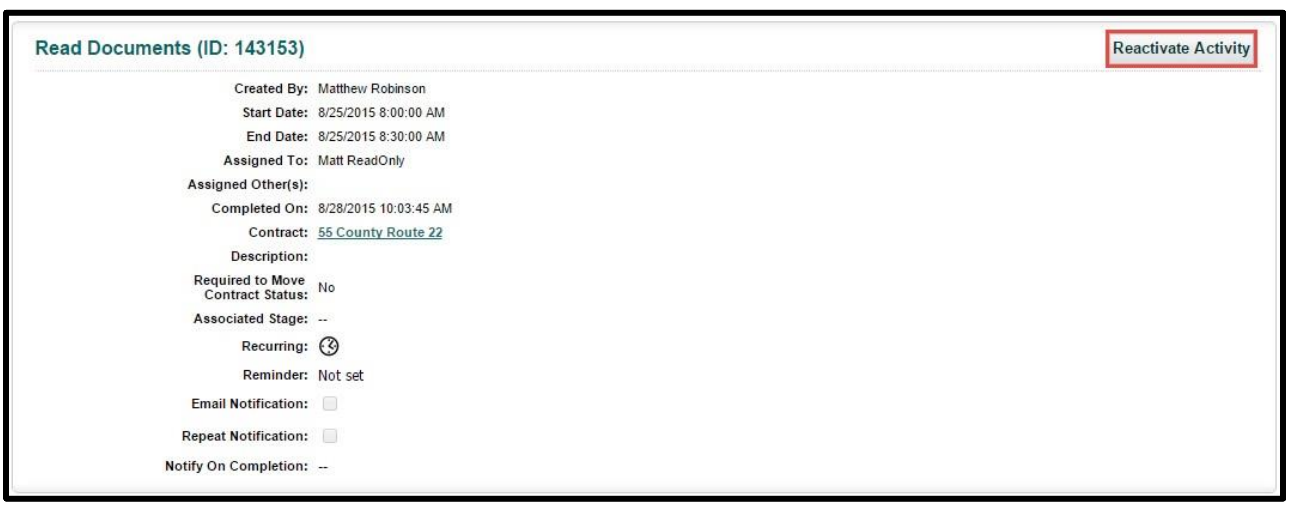
4. The *Complete* checkbox ☐ (only activities assigned to you will be clickable, otherwise they show up as a Red dot • and the square outline indicates the activity has been completed by someone else).

5. You are listed in the *Assigned To* Column.

After you locate the Activity you wish to Complete:



1. Display the Activity by clicking on the *Activity Name* in the Activity grid.
2. Click on the *Mark as Completed* button at the top right of the screen (this button only shows on the screen when the activity is assigned to you). If for some reason, you need to modify this Activity, before marked as completed, click on the pencil icon to edit the Activity again.



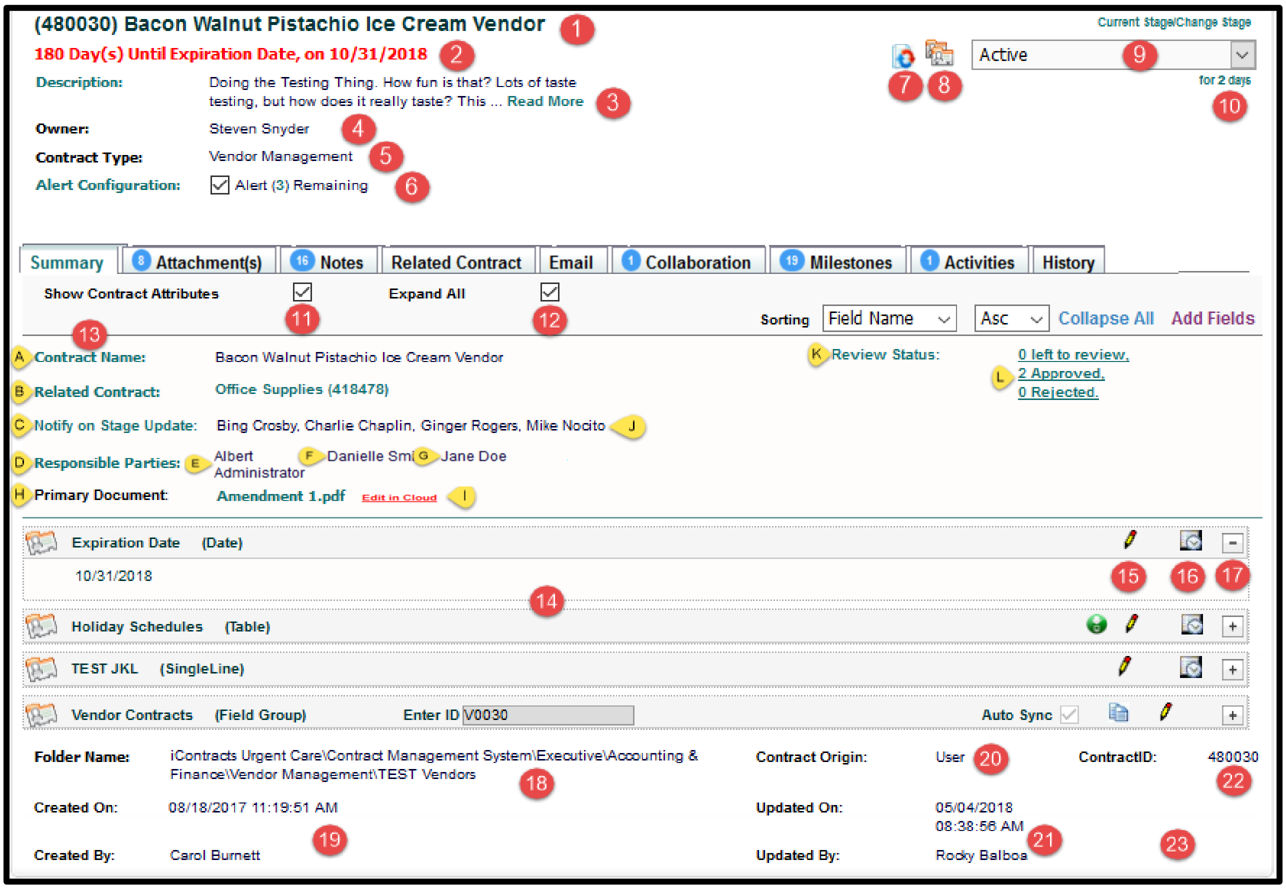
3. *Optional* – to reactivate an activity assigned to you that you have already marked as completed, click on the *Reactivate Activity* button. As illustrated in #2 above, you can use the pencil icon to modify the activity (such as changing the Start/End Dates).

The Contract Ribbon: Inside the Contract Container

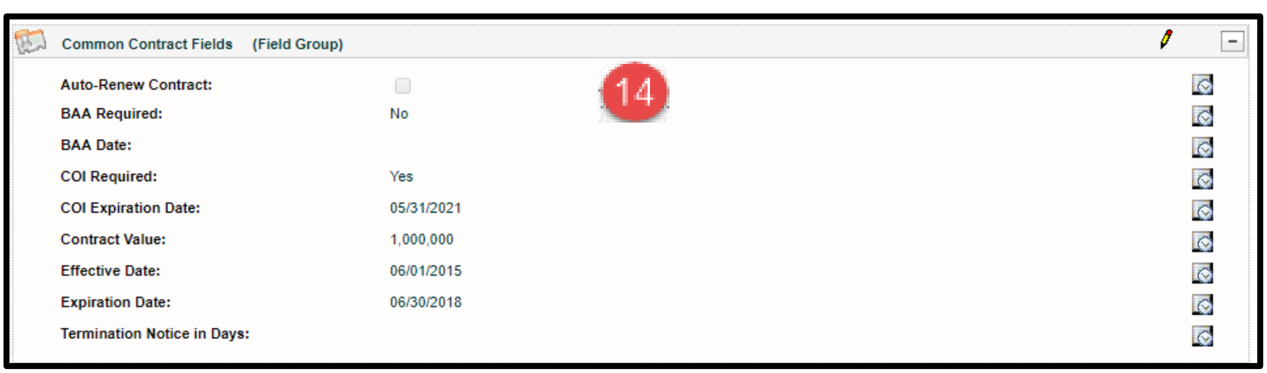
From within a Contract Container, you can see all of the data, documents, notifications, and notes that correspond to that particular agreement or contract. This section will guide you through the navigation and use of the functions available to you within a particular Contract.

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 8 Attachments, 16 Notes, 1 Collaboration, 19 Milestones, and 1 Activities. Email and History tabs don't display Tab Indicator Dots. No Related Contracts, no dot displays. The blue dots can accommodate up to 9999.

Summary Tab



Fields and Field Groups are displayed below the Contract Attributes (items A-L, explained on the next page).



1. (Contract ID) Contract Name 2. Countdown for Tracking *X* Date (if activated) 3. Contract Description (click "Read More" if needed) 4. Contract Owner 5. Contract Type 6. Alert Configuration (if activated) 7. Workflow Icon (changes to A if Contract Archived) 8. Workflow Assignees Icon 9. Workflow Stage Drop-Down 10. Days in Current Stage 11. Show/Hide Contract Attributes Checkbox 12. Expand/Hide Fields & Field Groups Checkbox 13. Contract Attributes 14. Field Groups/Custom Fields 15. Edit Field/Field Group Pencil 16. Individual Field History Icon 17. Expand/Contract Individual Field Group 18. Folder Name 19. Created On Date & Time/Created By User 20. Contract Origin (User, Bulk Loader, Copy, Template) 21. Updated On Date & Time/Updated By User 22. Contract ID (same # as shown at top of screen) 23. Archived On Date (only if Contract was Archived)	A. Contract Name B. Related Contract (Parent Contract Link) C. Notify on Stage Update D. Responsible Parties (P/S/T) E. Primary Party F. Secondary Party G. Tertiary Party H. Primary Document Link I. Edit in Cloud Link (if activated) but only available for .doc or .docx files J. Users assigned to Notify on Stage Update K. Review Status Link L. Reviewers Scorecard

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. These counts are dynamic; that is, if you delete an Attachment or Activity, the number in the blue dot updates immediately.

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*.

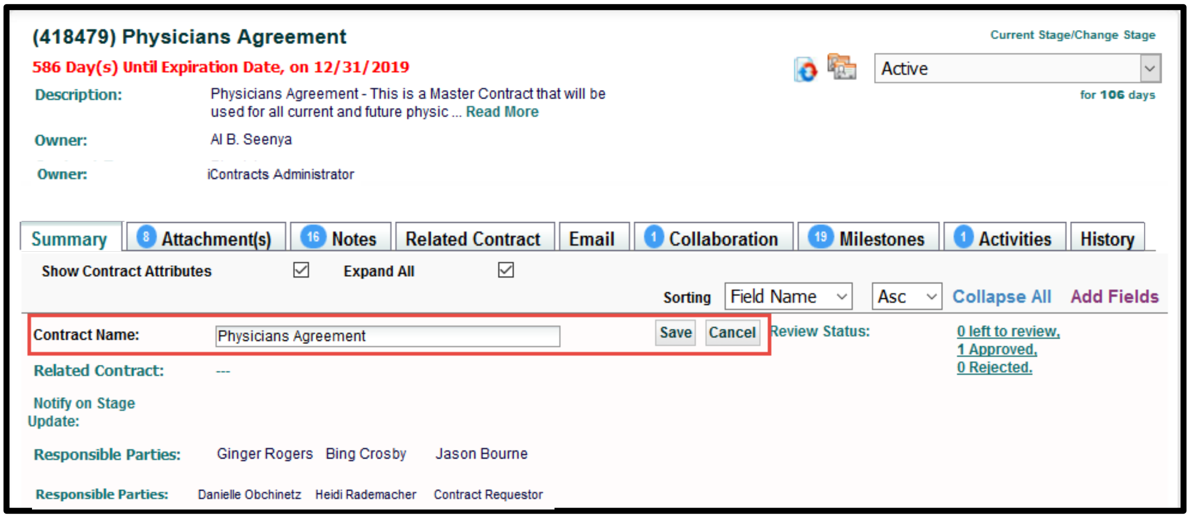
If you uncheck ***Show Contract Attributes***, then only those items between the thin blue lines (items A-K) are suppressed. ***Expand All*** will control the display of all fields listed on the Summary Tab.

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 (Direct Entry, Bulk Loader, Template, Library, or Copy), Update Information, Contract ID, and finally, the Archived On Date for only those Contract Containers moved into the Archived stage.

Editing Data in the Summary Tab

If granted *Folder Permissions* to edit Contract Attributes by your UCM Administrators, you will see the contract attribute labels as a blue link. You can then click on any of the blue links to edit the data for that attribute. Click **Save** (or Update) to save the new data.



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 Administrator users. 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. You can change the Workflow and/or which users are notified after a stage change. Click on this link "**Concurrent Stage Warning Messages**" to redirect you if a Contract is in this Stage for longer period than it should be, as determined by your UCM Administrator(s). See **Workflow Stage Reminders and Escalation Emails** for additional information.

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

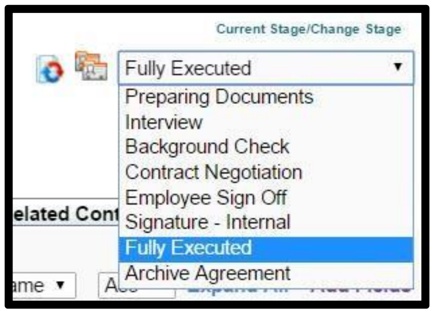
This specialized alert is set on a monthly cycle (every 1 month, 3 months, 6 months, 12 months, etc.) and for a preset number of times (0-999). This is different from Manual Milestones and Activities, which can repeat notifications daily until someone marks them as Complete. Alerts do not have daily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

Workflow

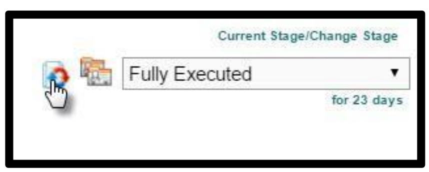
Workflows are defined by System Administrators and can be automated to appear as defaults for different Contract Types.

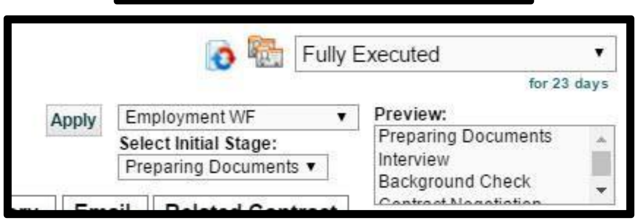
To advance a Workflow from its current Stage to the next, click on the current Stage name at the top right of the Summary page to reveal the *Workflow Stages* in a DropDown list. Workflows can only be advanced one Stage at a time but can jump backwards as many Stages as necessary.

- *Some Stages can be skipped if setup by your Administrators for that option. Your admin should notify you which (if any) stage is "skippable". That is, you can bypass a Stage on this list.*



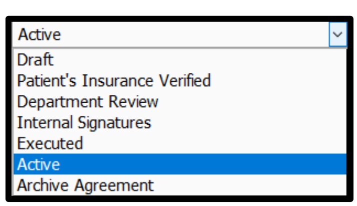
You can change a Contract's Workflow locally by clicking on the Red and Blue arrow button to the left of the Stage name (that is, **if** you are given permission to override workflows). This will show you a preview of the Stages in each Workflow available here. Choose your new Workflow Template from the DropDown and click **Apply** to start using a different Workflow for a particular Contract Container. Click again on the arrow button to cancel your changes if you don't want to apply any changes. If you *do not* have permission to edit, this button is gray instead of a red/blue icon.



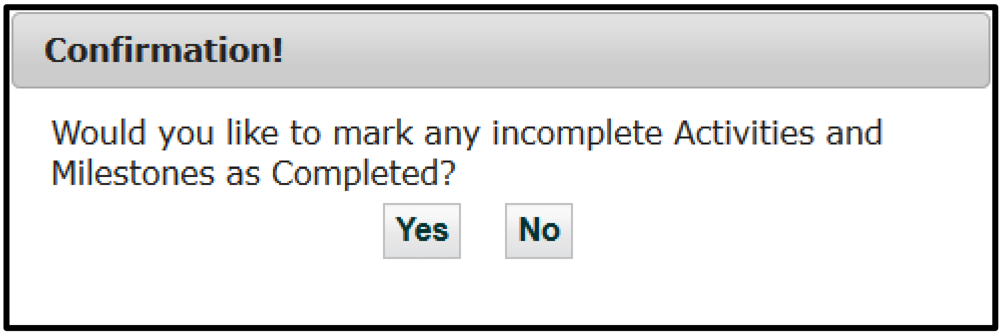


Archive Agreement

Some Stages may offer the ability to *Archive* the Contract Container. The Stages that allow this action are configured by the System Administrators. You do have the ability to skip stages straight to Archive Agreement anytime this option appears. This makes a Contract *inactive* without deleting it from the system (which you would never do in most cases).



When changing a Stage to Archive Agreement, you are prompted for a Confirmation **if** there are any incomplete Activities or Milestones. Click *Yes* to Complete or *No* to leave as Incomplete.

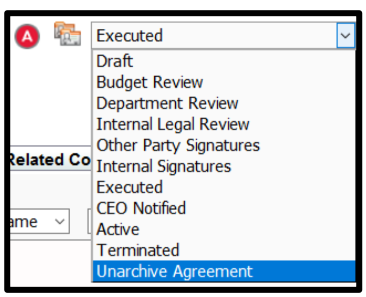


Once answered, the Contract Container will update and prompt you for a Note, asking why you are sending this to Archive. After typing your note, click the *Archive* button to save and complete the process.

The Workflow button becomes an icon, showing you that this Contract Container is Archived, and will not show up in any Contract Views ***unless*** you click "Include Archived" as part of any search criteria.

Unarchive Agreement

Any Contract Container that has been Archived can also be Unarchived. Once you locate the contract container and display it on your screen (Global Search, Custom Views, etc.), you can unarchive the contract container by changing the Current Stage to Unarchive Agreement.

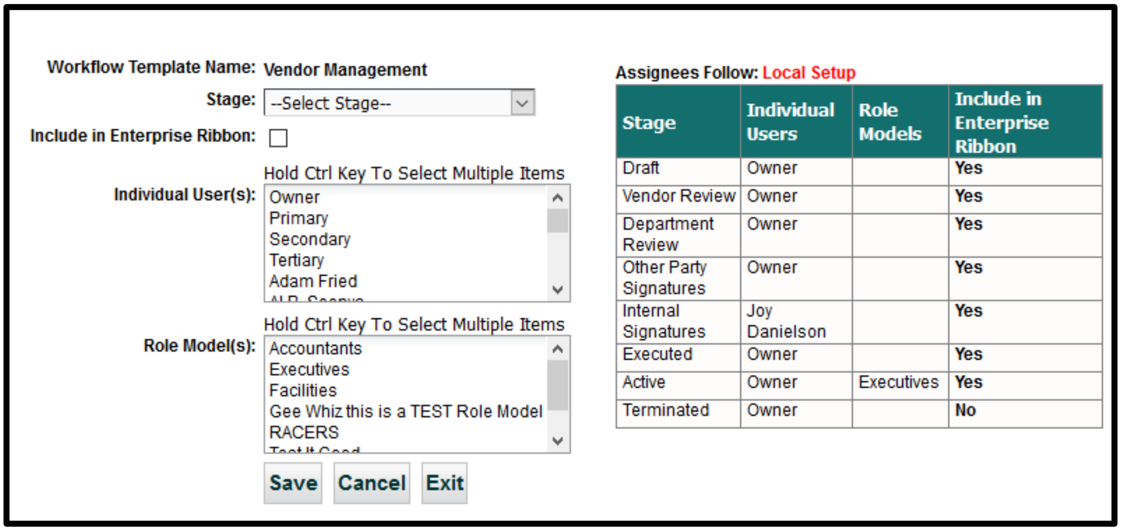


The Contract Container will update and prompt you for a Note, asking why you are pulling this from Archive. After typing your note, click the *Unarchive* button to save and complete the process.

The Stage returns to the **last known stage** where you can assign a different stage to the Contract Container, or leave the stage as is currently.

Viewing Assignees

Click on the orange ID cards button  to the left of the current Workflow Stage to open the **Manage Assignees** pop-up window.



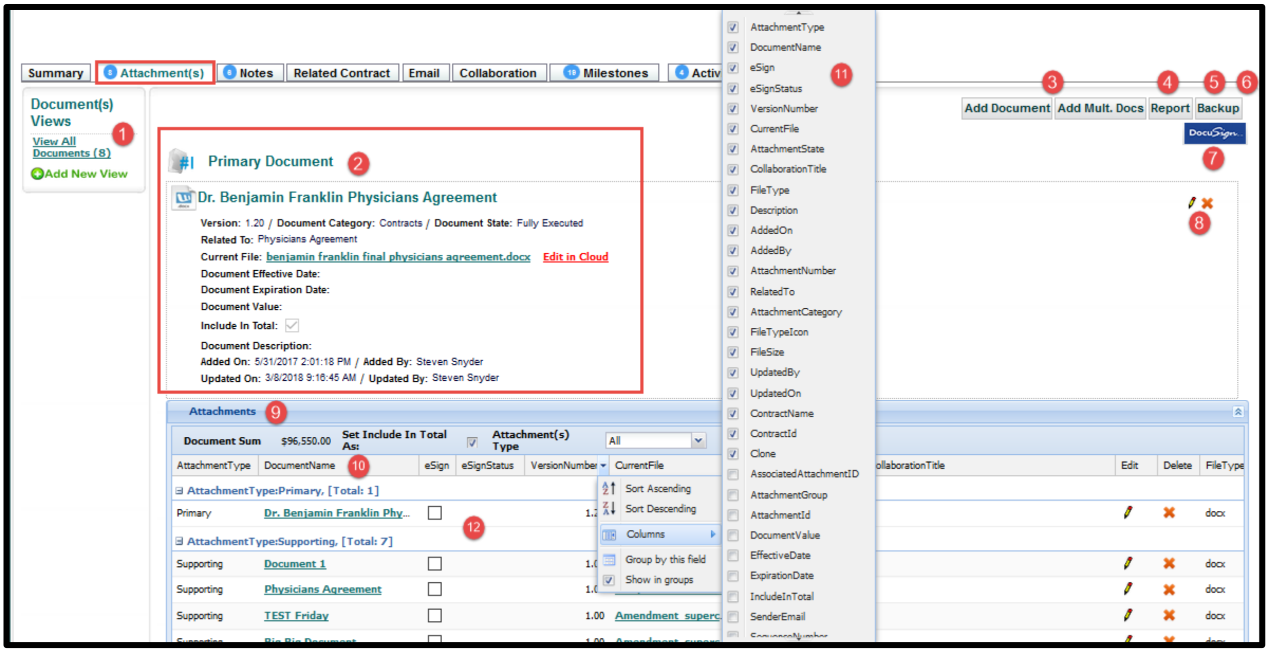
Managing Assignees

This area allows you to change the Assignees within a Contract locally. In the pop-up window, you can override the **Admin Setup** (provided they have not restricted this action) by changing both Individual Users and/or Role Models for each stage. Select the **Stage**, then the **Individual Users** (including Owner/Primary/ Secondary/Tertiary users), and any **Role Models**, if applicable.

For each Stage, updating with clicking the **Save** button, an additional pop-up will appear letting you know that changes have been made successfully. When finished updating all Stages, click the **Exit** button. The Assignees Follow "Admin Setup" then changes to "**Local Setup**" (see image above).

Making changes to Workflow Assignees within one Contract Container will not affect **other** Contracts utilizing the same Workflow. Assignees will receive an email whenever a Stage is changed to one in which they are assigned to as an individual or as a member of a role model.

The Contracts Ribbon: Attachments Tab



1. Document Views (similar to Contract Views)
2. Primary Document information
3. Add Document / Add Multiple Docs Buttons
4. Attachments Grid Report Button
5. Backup Documents Button
6. Explorer Mode Button (if enabled, not displayed)
7. Docu*Sign* Button (plugin purchased separately).
8. Primary Document Edit Pencil / Delete button
9. Attachments Grid
10. Attachments Column Headings
11. Column Heading Selections
12. Groups activated (these columns are grouped by *Attachment Type*)

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

***Note**: Clicking on the Edit Pencil icon allows you to edit the data for the associated document.*

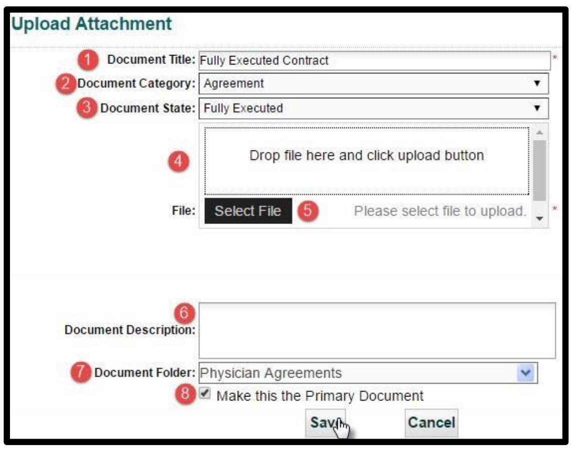
Navigating the Attachments Tab

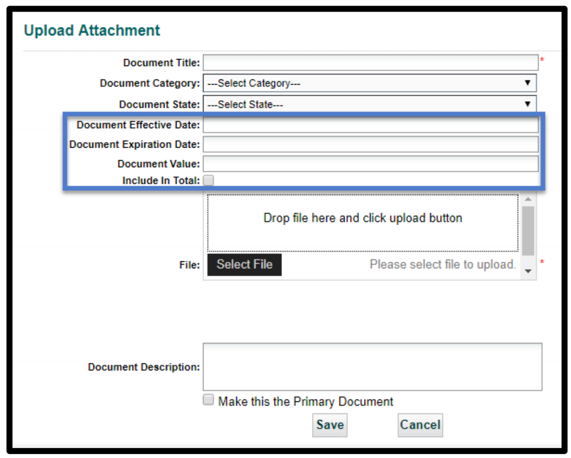
The first thing you want to do in this area is to personalize your grid view so that the information you need to see is easily found and accessible. For example, Document Name, Version Number, Attachment Category, Attachment State, Current File, Collaboration Title, and eSign/eSignStatus (for Docu*Sign* users only), are some of the more important data points, just to name a few. Having at least these columns appear in your grid will help you find your documents easily. Once you arrange your grid columns to a more efficient orientation, they will not change again until you decide to change them. This setting will also carry into other Contract Containers' Attachments tabs and the Attachments Tab at the Enterprise level.

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, the Views here will only apply to the specific Contract Container from which they are created. For more on Views, see the chapter for **Creating a View**.

Adding Documents

On the **Attachments Tab** within a Contract Container, you may have the ability to add new documents. To do this, click on the "*Add Document*" or "*Add Mult. Docs*" button at the top right above the Attachments grid. Click this **Uploading Multiple Attachments via Drag and Drop** link for additional help with using the multiple documents drag and drop or multiple select features.





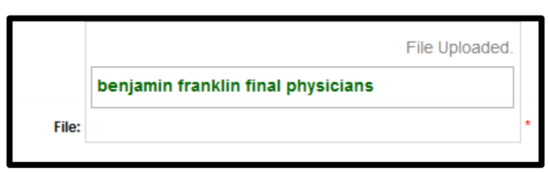
1. Document Title (mandatory field)
2. Document Category
3. Document State
4. Drag and Drop Document
5. Browse to Select File Button
6. Document Description
7. Document Folder (Explorer mode only)
8. Primary Document Checkbox

Administrators have an option to allow attachments to enable their own *Effective Date*, *Expiration Date*, and *Document Value*. In addition, Document Values can be included (or excluded) from a running total displayed on the Attachments grid (as shown inside the blue box above right).

On the **Upload Attachment** page, you will type the mandatory *Document Title*, select the optional Category, and the Document State. Next, you can either Drag and Drop the file into the drop area or click "*Select File*" to browse for the document.

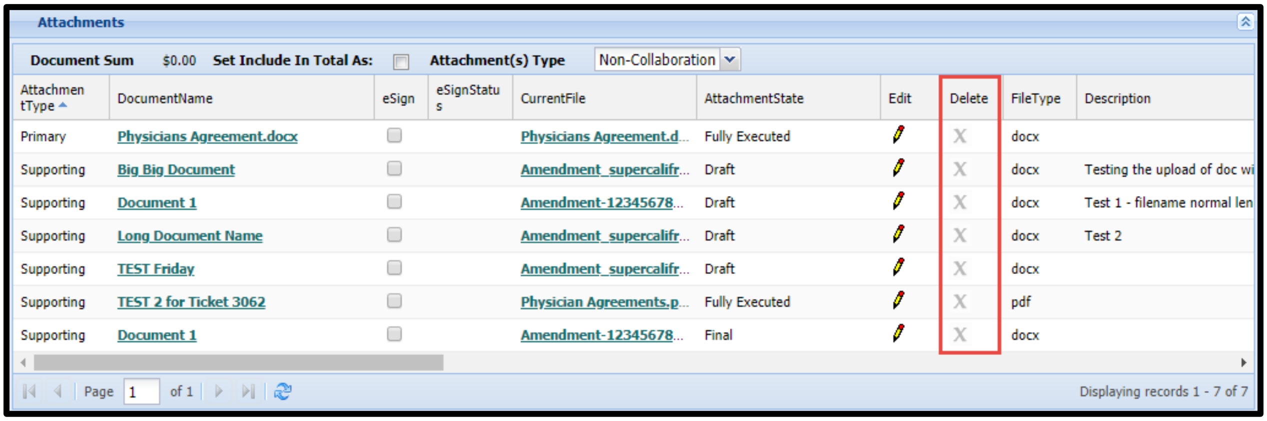
- Scanned (PDF) documents should be 200 dpi gray-scaled to keep the file size within acceptable limits to make uploading and downloading attachments less prone to system errors.

When you have located the document(s), the file(s) automatically upload. The text above the file names should read "*File Uploaded*".



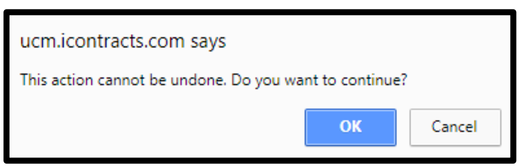
Deleting A Document

On the **Attachment(s) Tab** you *may* have the ability to delete documents (admins always have access). If given access, click on the "*Delete Document*" icon in the Attachments grid. As with any column, you control the location of this column, or even if the column is displayed in the first place.



Contract Ribbon Showing Access Denied for this User

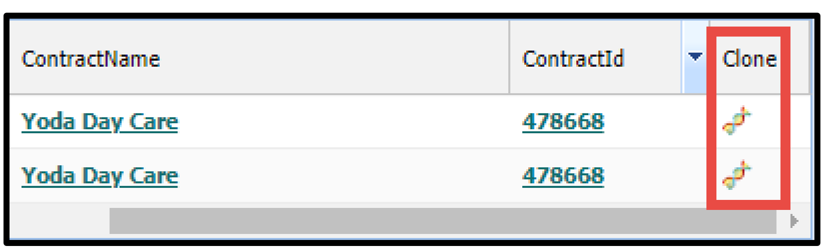
Clicking on the to delete a Document will result in displaying **two** messages:



Once you click **OK** after the 2nd message, you have deleted the document from UCM. There is no Undo!

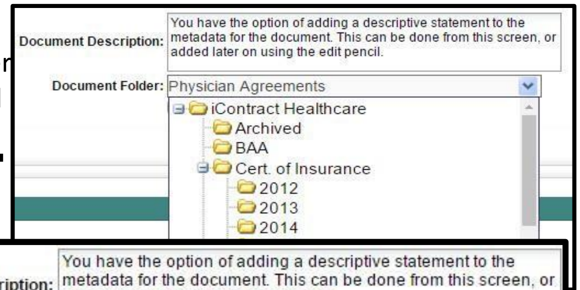
Cloning an Attachment

Users have the ability to duplicate an individual document with the *Clone* feature. Using Clone is similar to Upload Attachment, except the Document Title, Category, and Stage are "cloned" from the original document. Refer back to Adding Documents for these instructions.

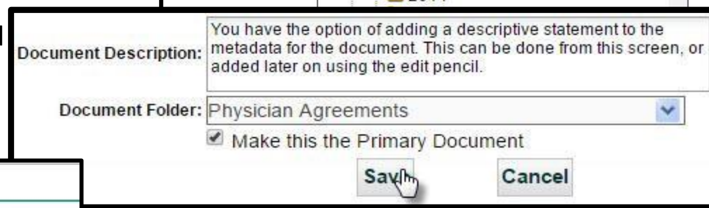


Explorer Mode

If your System Administrators turned on the option for Explorer Mode, you will see a section to choose the folder within this container that the document should be placed within.



If this should be the Primary Document for the Container, check the box to "*Make this the Primary Document*". Click **Save** when you are finished and the document will be loaded into the Container.



Select Associated Attachment

Title	Version	Added By	Added On	Attachment State	Attachment Category	
Final Contract	2.10	Lead Attorney	10/6/2015 12:01:57 PM	Final	Agreement	Select
BAA	1.00	Matthew Robinson	4/2/2015 10:46:33 AM	Fully Executed	BAA	Select
Financial Analysis	1.00	Matthew Robinson	4/2/2015 10:47:32 AM	Final	Financial Analysis	Select
COI 2015	1.00	Matthew Robinson	4/20/2015 12:09:54 PM	Final	Cert. of Insurance	Select
COI 2014	1.00	Matthew Robinson	4/20/2015 12:25:40 PM	Final	Cert. of Insurance	Select
Amendment 2014	1.00	Matthew Robinson	4/20/2015 12:31:53 PM	Fully Executed	Amendments/ Adendums	Select
Amendment 2015	1.00	Matthew Robinson	4/20/2015 12:32:40 PM	Fully Executed	Amendments/ Adendums	Select
New contract language Amendment	1.00	Matthew Robinson	9/23/2015 7:03:36 AM	Final	Amendments/ Adendums	Select

Document Versions

If there are any other documents within the Container prior to the one you are currently loading, the system will ask you if this is a version of something that has already been stored. If you select "*No*" this will simply load the document and direct you back to the Attachments Tab. However, if you select "*Yes*", this will prompt you to select what version is this document and to assign a version number.

Using "*Add Mult. Docs"* will not prompt you for Document Versions.

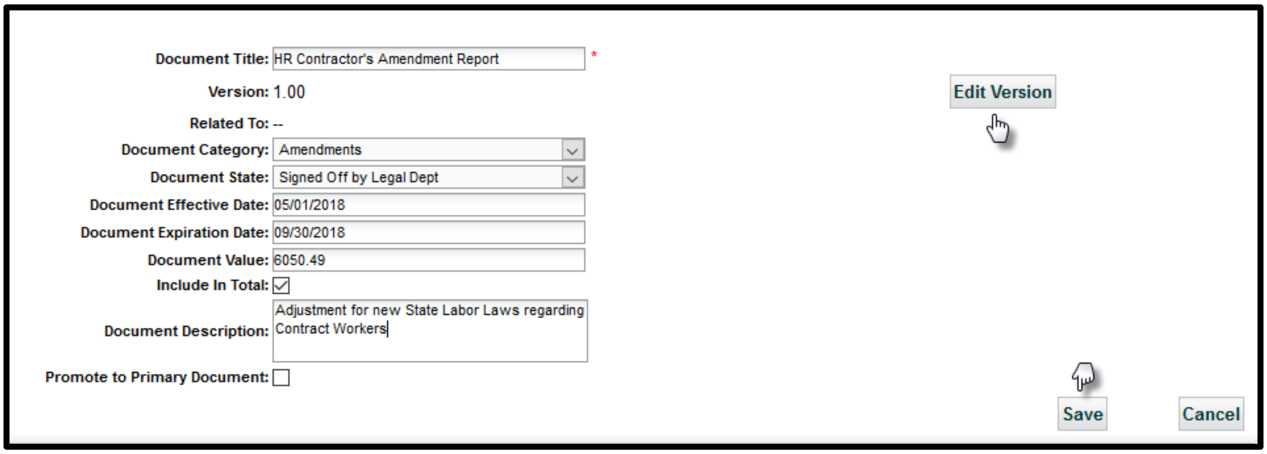
Editing Document Data

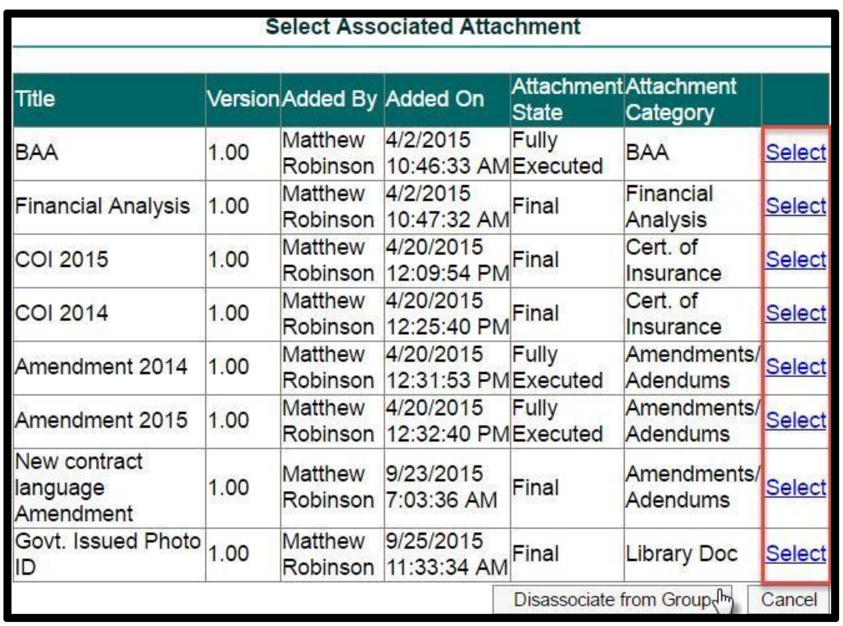
If you click on the yellow **Edit Pencil** in the grid, or to the right of the Document Name, you will be able to edit the data associated with the document. You can change the Document Title, Category, State, Description, or Folder. If enabled, you can edit the Document Effective Date, Expiration Date, Document Value, and Include in Total checkbox. You also have the ability to promote a Supporting Document to Primary Document – or demote a Primary Document to Supporting Document.

If you do promote a Supporting Document to Primary, the current Primary Document is automatically demoted to a Supporting document.

This is also where you may edit the ***Document Version***. If an uploaded document was associated to another document (for example, the Primary document), those two documents are grouped together. You can remove a document from a version group or reassign the document to a different group.

To edit the version of a document, click the ***Edit Version*** button. To remove this document from its current group, click *Disassociate from Group* at the bottom of the popup window. By clicking on **Select** to the right of any of the documents shown on this screen, you will add the current document to one of these version groups. There will be a subsequent popup prompting for this document's new version number.





Select Associated Attachment

Title	Version	Added By	Added On	Attachment State	Attachment Category	
BAA	1.00	Matthew Robinson	4/2/2015 10:46:33 AM	Fully Executed	BAA	Select
Financial Analysis	1.00	Matthew Robinson	4/2/2015 10:47:32 AM	Final	Financial Analysis	Select
COI 2015	1.00	Matthew Robinson	4/20/2015 12:09:54 PM	Final	Cert. of Insurance	Select
COI 2014	1.00	Matthew Robinson	4/20/2015 12:25:40 PM	Final	Cert. of Insurance	Select
Amendment 2014	1.00	Matthew Robinson	4/20/2015 12:31:53 PM	Fully Executed	Amendments/ Adendums	Select
Amendment 2015	1.00	Matthew Robinson	4/20/2015 12:32:40 PM	Fully Executed	Amendments/ Adendums	Select
New contract language Amendment	1.00	Matthew Robinson	9/23/2015 7:03:36 AM	Final	Amendments/ Adendums	Select
Govt. Issued Photo ID	1.00	Matthew Robinson	9/25/2015 11:33:34 AM	Final	Library Doc	Select

Disassociate from Group Cancel

Primary Document

The *Primary* or main document listed for a Contract by Full-Access or Administrative users will show in a large area above the Attachments 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 **Current File** name (depending on permissions) or edit the document online if this is the most recent version of the document (see the "**Edit in Cloud**" section below).

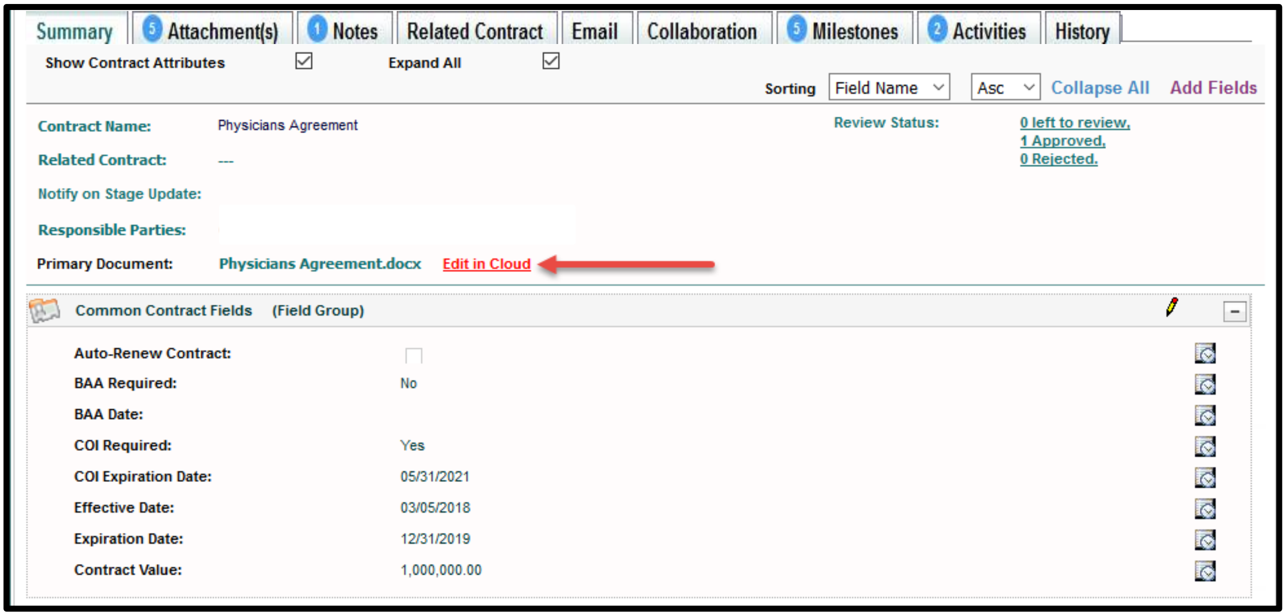
In the above example, there is a warning message letting users know that this may not be the most recent Version # of the document and that a document with a higher version number exists. Full-Access or Admin Users can update another document to the Primary if necessary.

Edit in Cloud

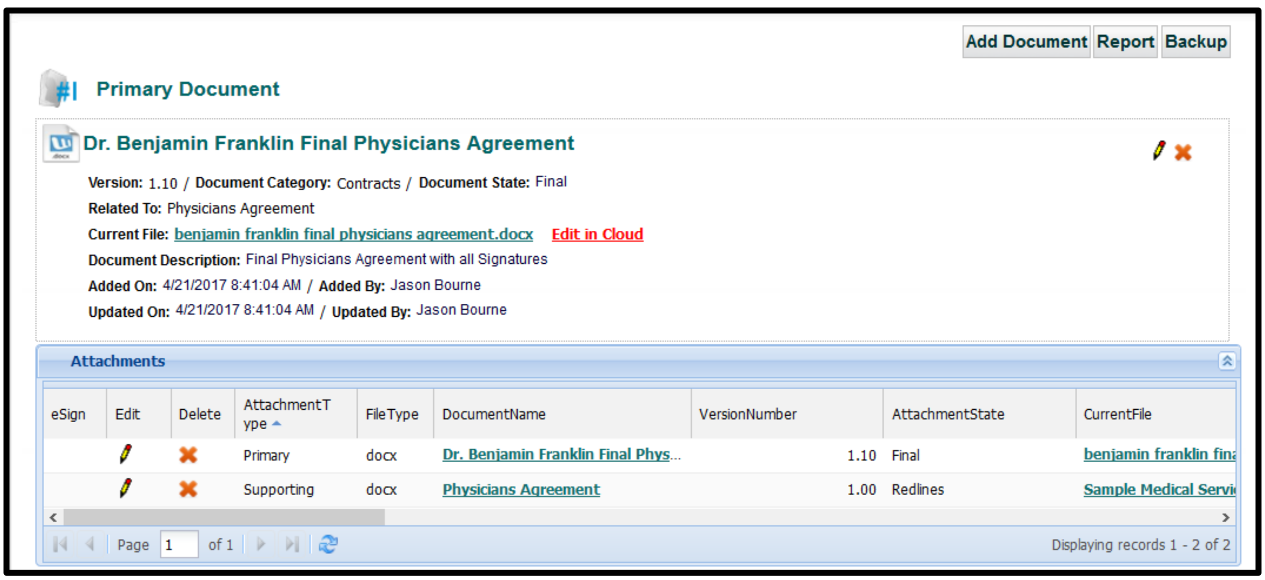
The **Edit in Cloud** feature will only be an option if turned on by your System Administrators. If this feature is being utilized by your organization, it will allow you to edit a document online without the hassle of saving a local copy to your machine, making changes, and then re-uploading the document later on. With Edit in Cloud you will be able to redline/edit documents right in the software.

> *Note: Edit in Cloud can only be used on the most recent version of a Word document.*

There are two ways to use **Edit in Cloud**. The first way is to navigate to the Summary tab, where you will see the *Primary Document* name listed with the Contract Attributes. The second way is to view the Attachment(s) tab and display the current version number of the word document. This information can be easily found for the document in the section above the grid or by clicking on the Document Name within the grid area. Once you display the latest document, click on the "Edit in Cloud" link.



The Summary Tab

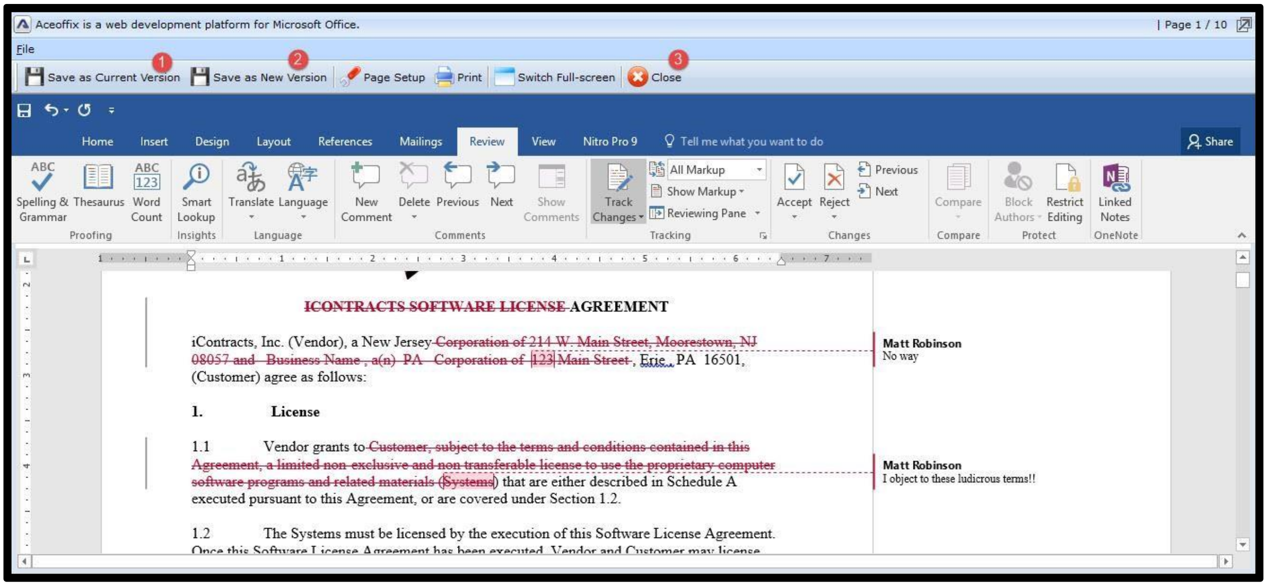


The Attachment(s) Tab

This will initiate a popup asking if you want to edit this document online. Click the **OK** button to continue.

This will run a plugin for your web browser called **Aceoffix**. If it has not been installed yet, follow the screen prompt or you may need to contact your IT Department for assistance with installing it. The plugin will pull your local version of Word into a browser window. From here you will be able to edit your document online.

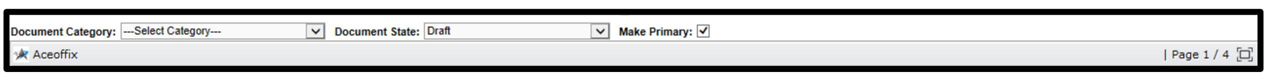
If prompted to install or upgrade your Aceoffix plugin, please contact your UCM Administrators for further instructions. They have additional instructions on installing this plugin or any Aceoffix upgrade.



1. Notice the *Save* buttons along the top of the Window?
   This is the **Save as Current Version** button.

2. **Save as a New Version** will increase the document's current version number by **.10**.

3. You will close the Window with the **Close** button (preferred method) or the **X** in the window's corner.



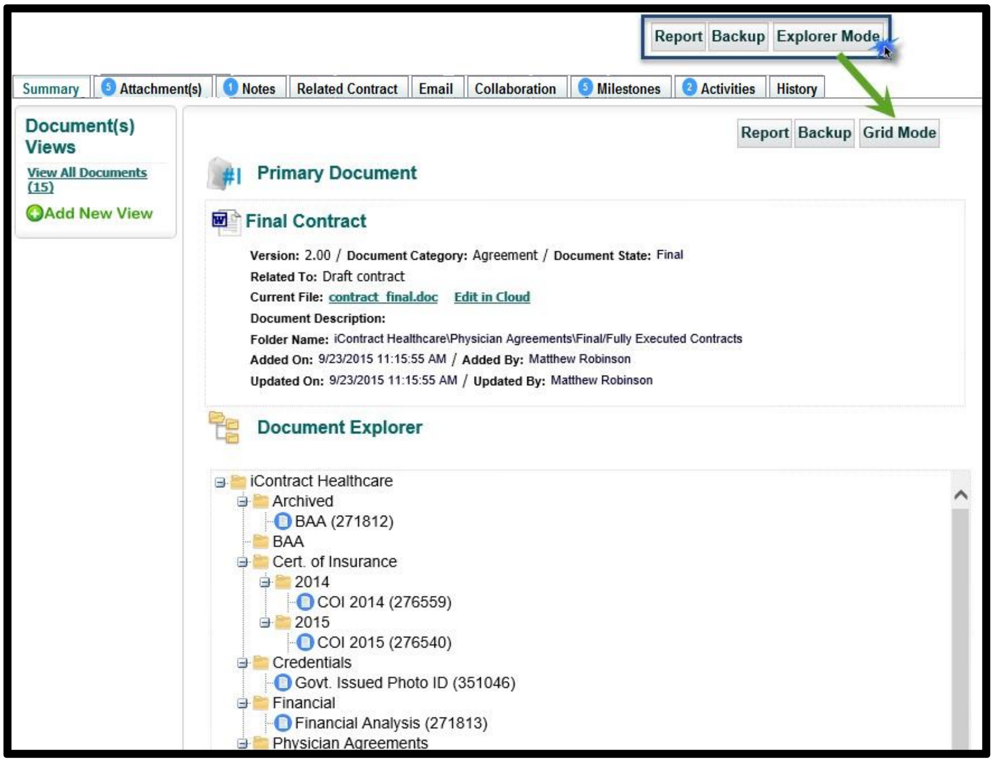
The top of the plug in allows you to update the *Document Category*, *State*, or change if the *Primary document*. Each of these drop-downs are optional, as it the option to change whether or not to Make Primary. If you change any of these options, it is recommended that you *Save as New Version* before you close the document plugin.

The Aceoffix plugin is designed to prompt you for saving the document after 15 minutes of inactivity. Once you save the document as either a current version or a new version, the system will automatically save over that version every 15 minutes. *Clicking the Close button to exit will prompt you to save your file while the Windows X button to exit will not prompt you to save your document.*

Explorer Mode – An Optional Feature

This option is only available to you 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 Windows Explorer-type *Folder structure* that may be different for each Contract.

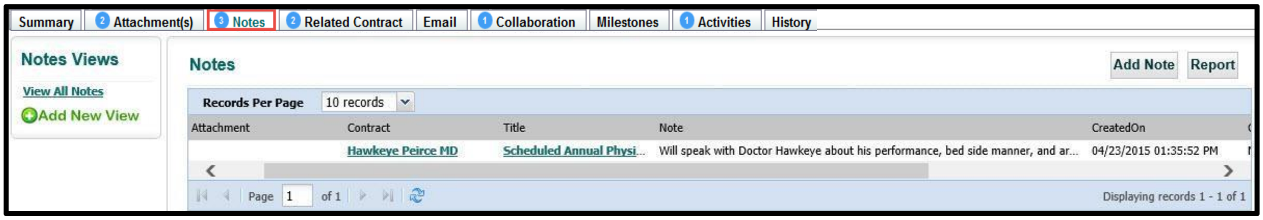
If this option is enabled, click on the **Explorer Mode** button at the top-right above the grid. Once you do so you will see the grid replaced and the *Explorer Mode* button now says *Grid Mode*. You can toggle the views back and forth as needed.

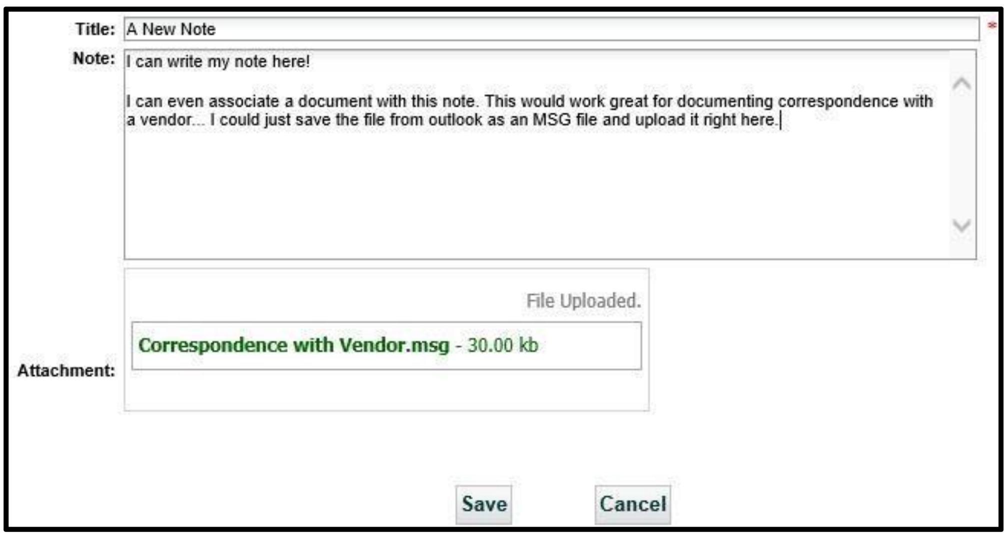


The Contract Ribbon: Notes Tab

The **Notes Tab** within the Contract Container is an area to keep Notes associated with a Contract Container. This is a great area to keep track of collaborations about the contract in an organized and chronological manner. System Administrators and Full Access Users can copy and paste from emails or add notes because their access permissions are 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.

To learn more about working with the notes, go to the chapter in this manual on **Creating a Note**.



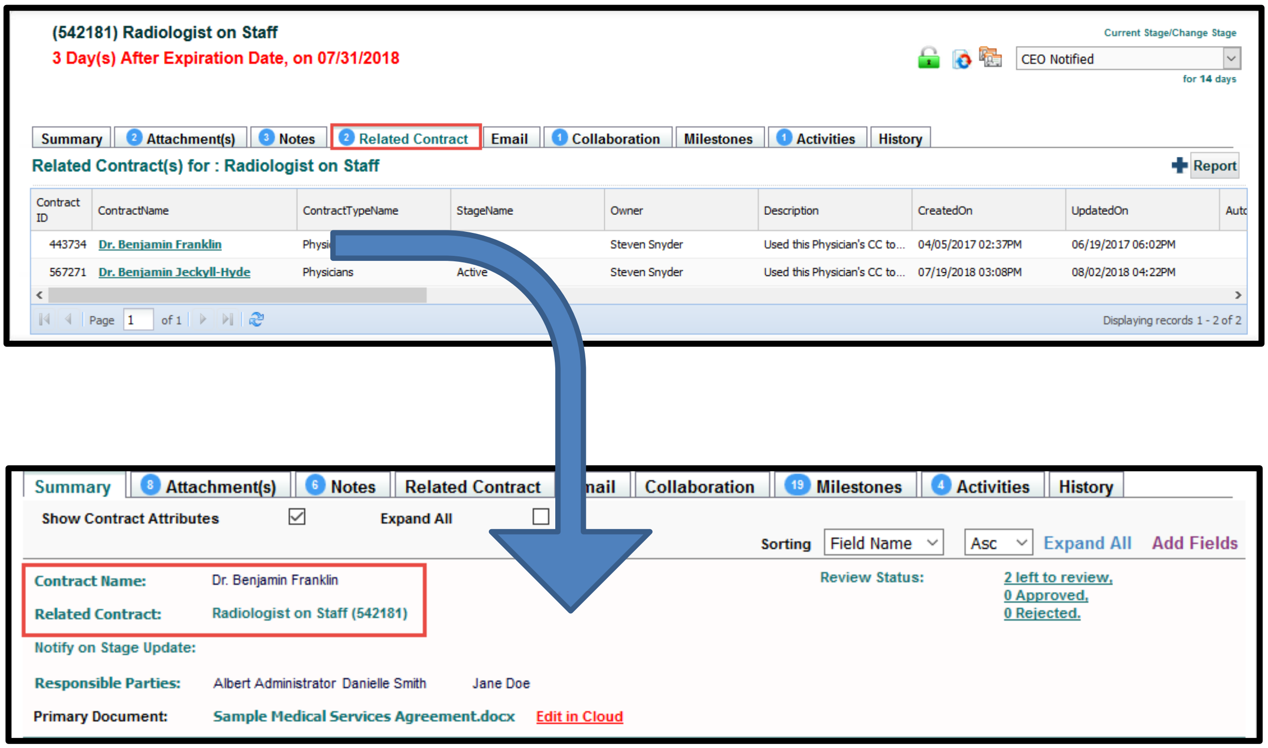


You read the note by clicking on the **Title** in the Notes grid.

The Contract Ribbon: Related Contract Tab

You can also 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.

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.



As you can see from these images, clicking on "*Dr. Benjamin Franklin*" from within the Related Contract grid displays in the Related Contract attribute, the parent contract, "*Radiologist on Staff*". If you click on the Related Contract link, you are able to view this parent Contract Container.

The Contract Ribbon: Email Tab

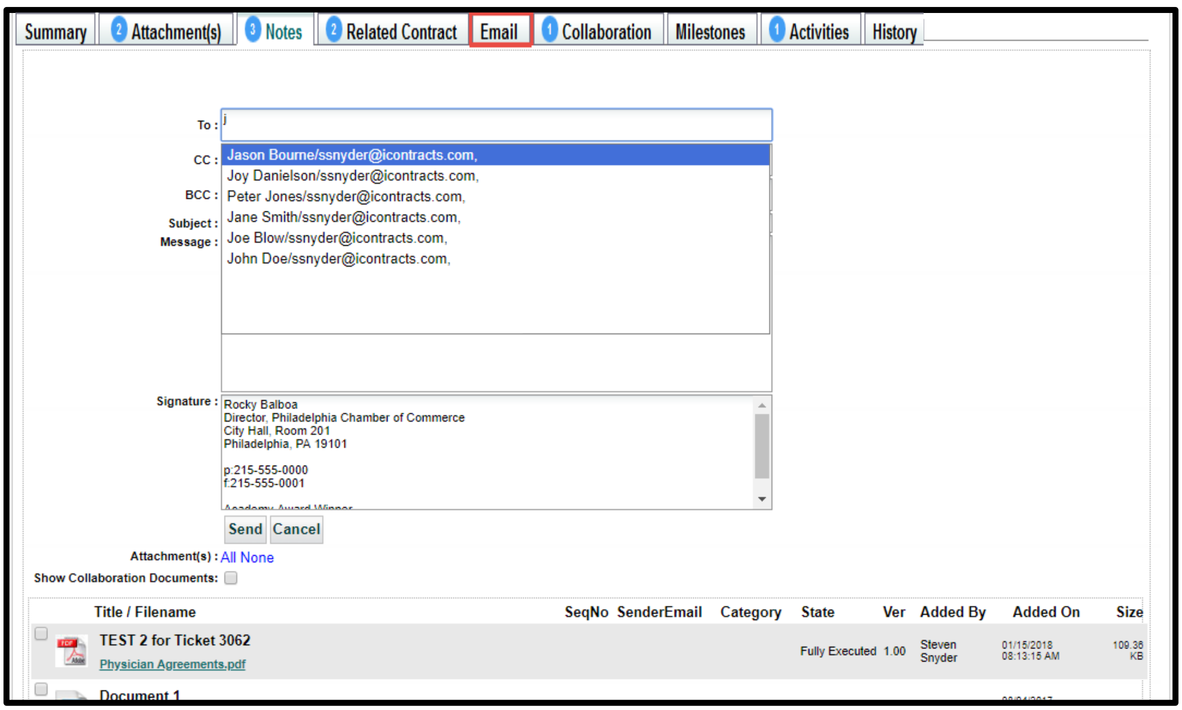
The Contract **Email Tab** allows users to communicate directly from within UCM. Email supports internal and external addresses To:, Cc:, and Bcc: -- in addition to Subject, and an area for the message to the recipients. Please note that your email address *may not* be displayed on the CC: line because the 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 in 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 to the left of the Message box, allowing you, where your cursor is currently positioned, to insert a hyperlink to the Contract Container's **Summary Tab**.

Only UCM users will be able to log into the system and view this information.



Email Attachments

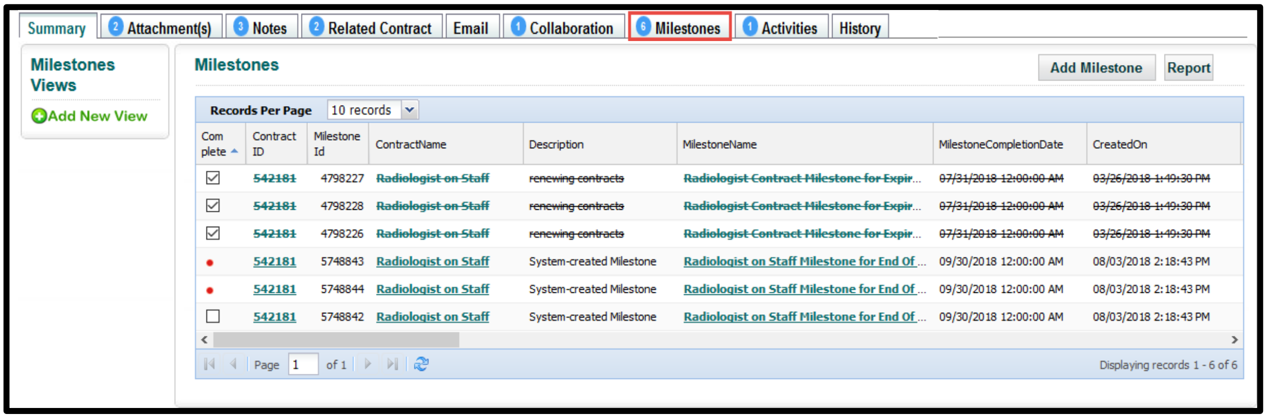
Your UCM Administrators set *"Default for Email Attachments"* to either **All** or **None**. Whichever way your company's setup has been configured, you can choose either All, None, or select/deselect individual attachments to include with your email.

If you company has activated Collaboration, you will also have an option to "Show Collaboration Documents", in addition to your regular email attachments.

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 email 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 edit pencil icon to edit the Milestone.



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).

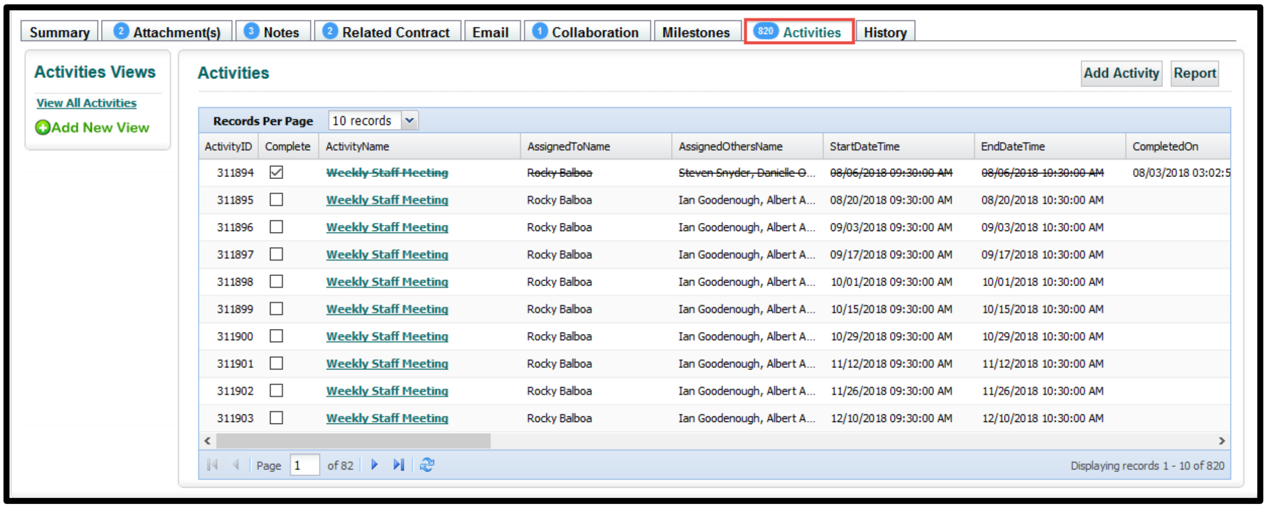
Completed Milestones appear ~~crossed out~~, as illustrated by the first one in the grid, as shown above.

You can add **Manual Milestones** by clicking on the *Add Milestone* Button. To learn more about creating Manual Milestones, go to the chapter on **To Create a Manual Milestone**.

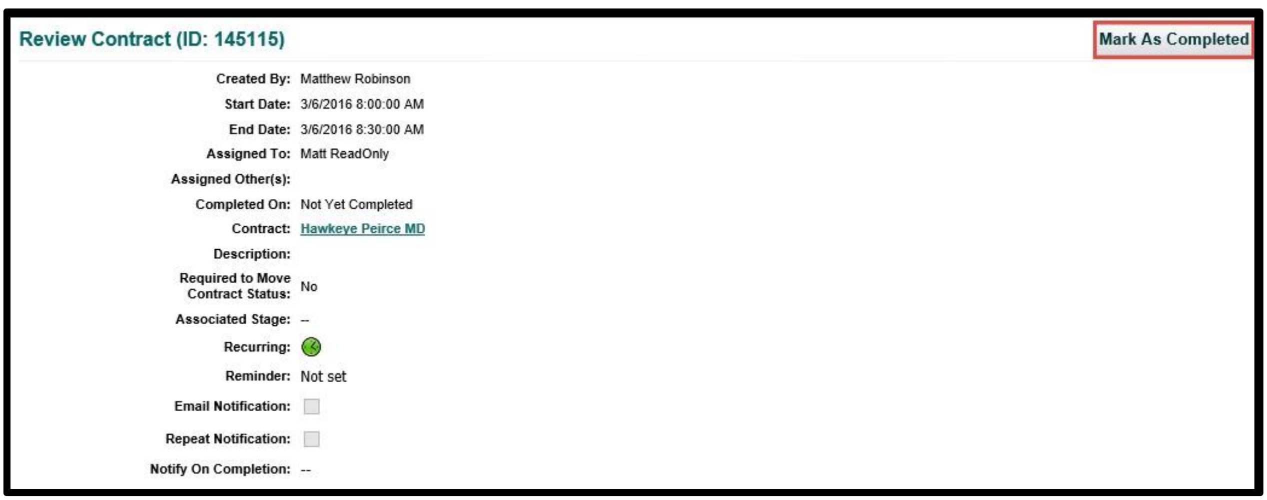
You can create **Milestone Views** on this tab for individual Contracts. See the chapter for **Creating a View** for information on creating Milestone Views.

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 may also be exported (to Excel by default) by simply clicking on the *Report* button. For more information in Views, please see <u>Creating a View</u> by clicking the link.



If an Activity has been assigned to 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 updates, showing completed Activities crossed out.



Click on the "AMEX" icon to view your Activities. You may also receive notifications by email for 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 (explained later in this section) as well, if activated by you UCM Administrators.

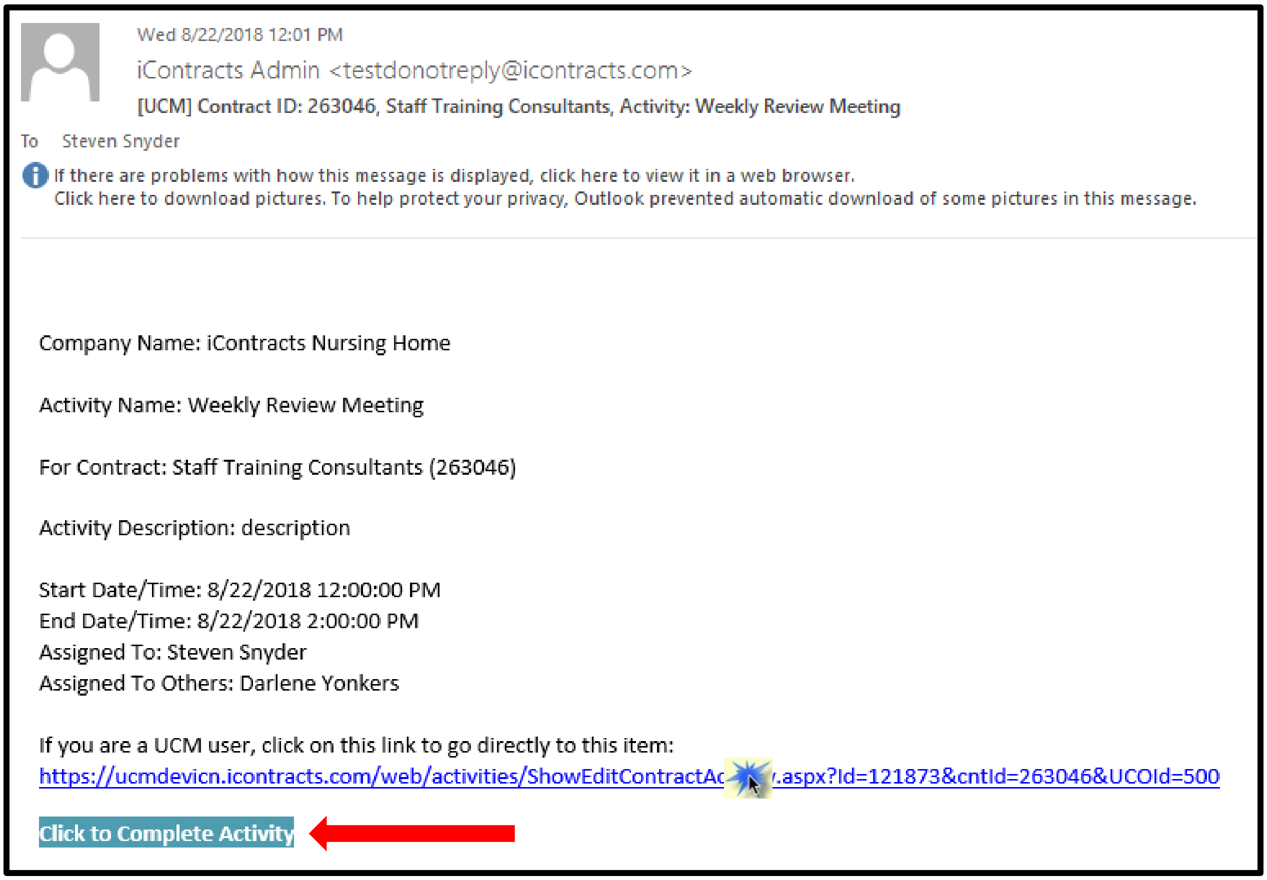
To create new Activities for this Contract, click on the **Add Activity** button at the top right of the grid. You can learn more about this in the section for <u>Creating a New Activity</u>.

Receiving Activity Notification Emails

Assigned To Users

Users setup as "*Assigned To*" may receive their Notification Email with a blue "**Click to Complete Activity**" button at the bottom of the email, as demonstrated in this sample email.

There is also a link to the Activity itself within the Contract Container. Clicking on this link in the email directs the user to UCM, where they can log into the system to access this Activity.



Wed 8/22/2018 12:01 PM
iContracts Admin <testdonotreply@icontracts.com>
[UCM] Contract ID: 263046, Staff Training Consultants, Activity: Weekly Review Meeting
To Steven Snyder
If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

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

If you are a UCM user, click on this link to go directly to this item:
https://ucmdevicn.icontracts.com/web/activities/ShowEditContractAc[illegible]y.aspx?Id=121873&cntId=263046&UCOId=500

Click to Complete Activity

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 (see illustration on the next page). 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.

☞ **No-Login Users** can be assigned as either "Assigned To" or "Assigned To Others". These User Types cannot log into UCM if they click on the email link. If designated as the "Assigned To" user, they can click on the "**Click to Complete Activity**" button if active.

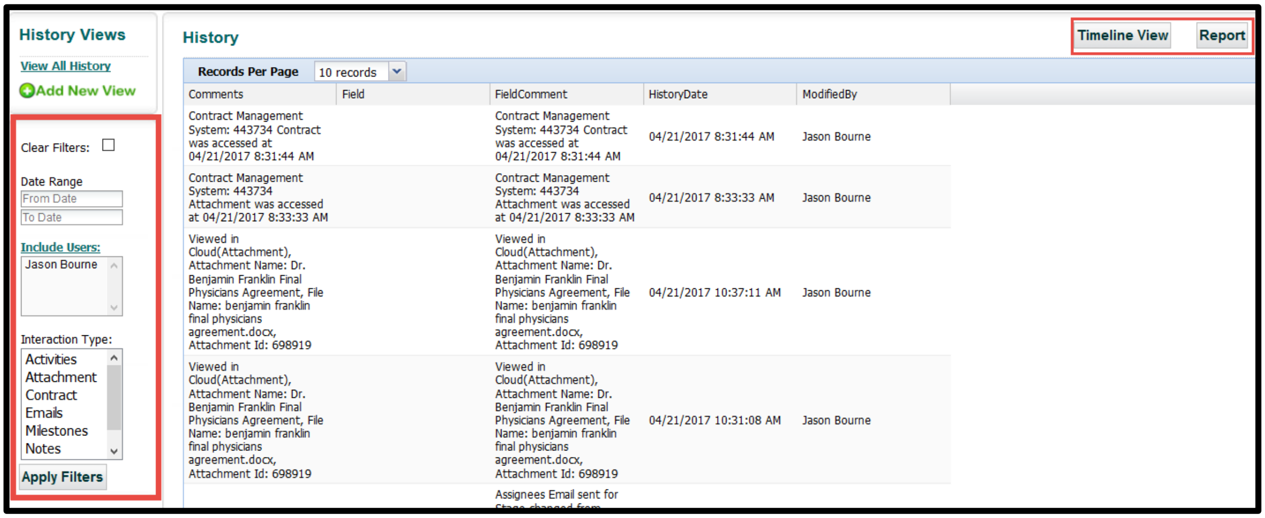
Completing an Activity via Email Button

Whether or not you are logged into UCM prior to clicking the *"***Click to Complete Activity***"* button, 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**.

The Contract Ribbon: History Tab

The Contract **History Tab** provides you with a view of changes made to a contract since the contract was entered into the system. 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). There are only five columns and all of them display in the grid. History serves as an audit trail so that anyone with access can see when Contract Fields and Attachments were added, edited, and deleted. The UCM Administrators control whether a Full-Access user can Show All History, or only for the current user.



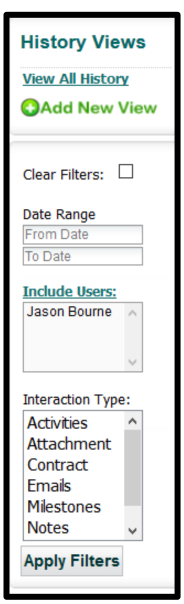
The History of a Contract Container cannot be modified; even by a Company's System Administrator. A full History of all changes can only be seen by an Admin and must be requested from them.

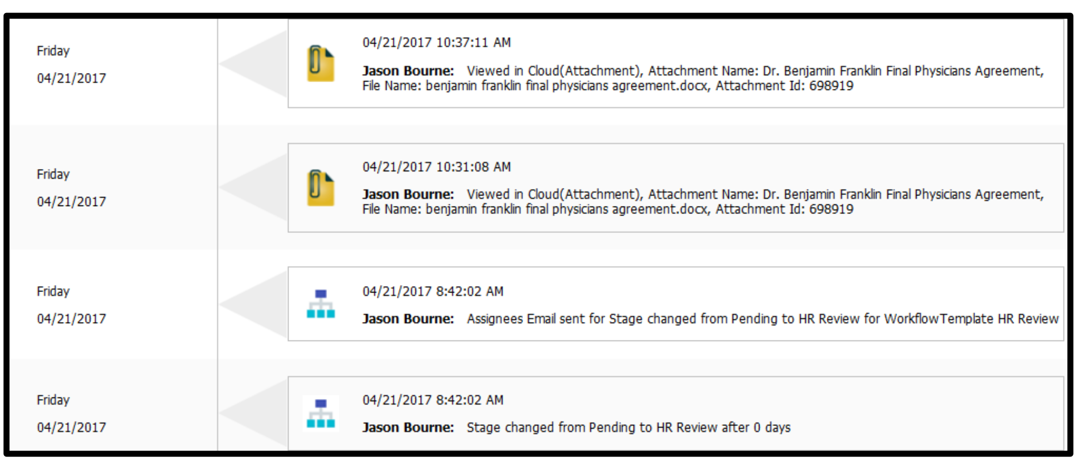
However, you can change ***how*** to view the contract history. The *History grid* can be changed into a *Timeline View*, which changes the grid into a graphic timeline (see image below). Click the *History View*

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, you can filter the **History Views** with a unique set of filtering, only available to the History Tab. There are filters by *Date Range*, *Users*, and *Interaction Type*. Use **Apply Filters** to activate any filtering. The *Clear Filters* checkbox is used to reset any filters. The **Add New View** allows you to search by select criteria separately from the filtering options. You can also use Add New View with either the Timeline View or the History View.

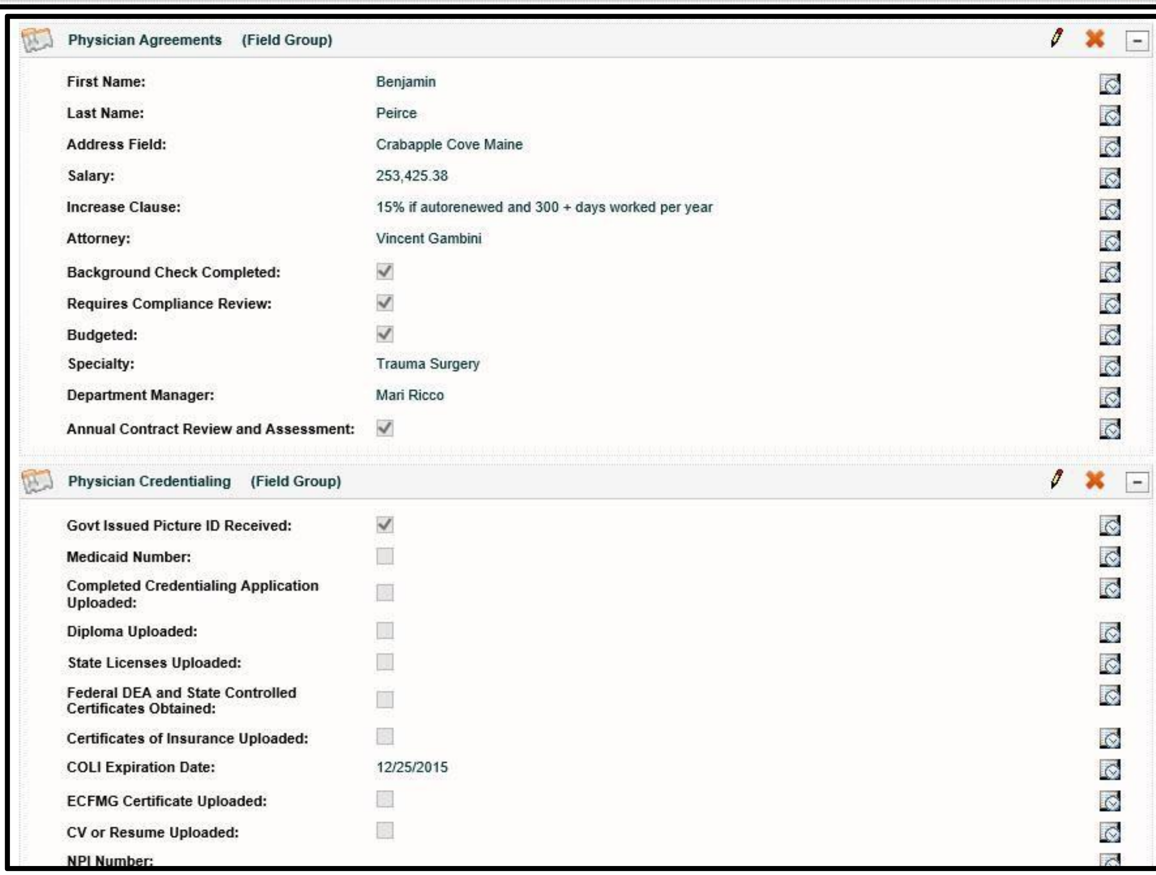




A Closer Look at Contract Fields

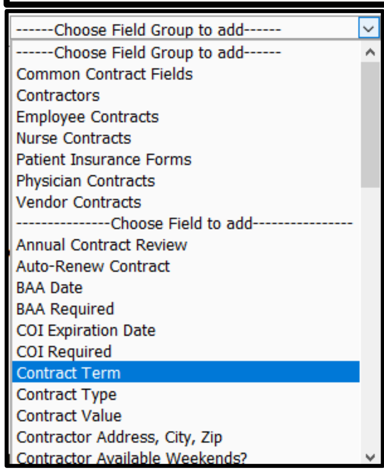
Fields that were added on a one-by one basis are entered beneath the standard Contract Container information in their own ribbons.

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:



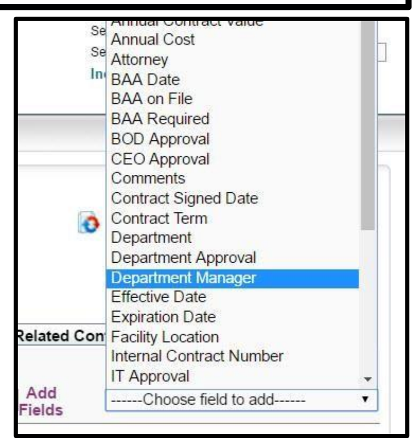
When you expand the Field Group, it displays all the field data contained therein (above). You are able to expand or collapse Fields and Field Groups by clicking on the **+** or **–** at the top right of the Field Group. You can also select the *Expand All* checkbox at the top center of the *Summary*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

Adding Fields to the Contract Container



Regular Field Listing

Choosing a Field Category (optional)



Field List Limited to Field Category

Adding fields is done in the Summary Tab by clicking the **Add Fields** link under the Contract Ribbon. This is a toggle link too so you can click the link again to cancel your action.

After clicking the link, a drop-down list containing all the fields defined in your system appears, with any Field Groups appearing at the top, separated by a dashed line. By selecting a *Category* first, only those fields that were assigned to that field category will appear in the field list. This acts as a filter to narrow down a potentially large list of fields available in your system.

Contract Field Types

Within UCM there are a number of different types of fields that Administrators may utilize for you to fill out within a Contract Container. They are as follows:

- Checkbox
- Date (or Calculated Date)
- DropDown
- Multiline
- MultiSelect
- Numeric (or Calculated Numeric)
- Single Line
- Table

You do not enter data in a calculated field, as the values are auto-filled based on other values.

Some of these fields may appear in red (requested) or **bold** and **red** (mandatory).

Requested Fields are still optional, but your Administrators prefer that a value be entered if at all possible. This type of field will remind you with a pop-up that you have not filled in a value when you click **Save** but will still allow you to proceed without an entry.

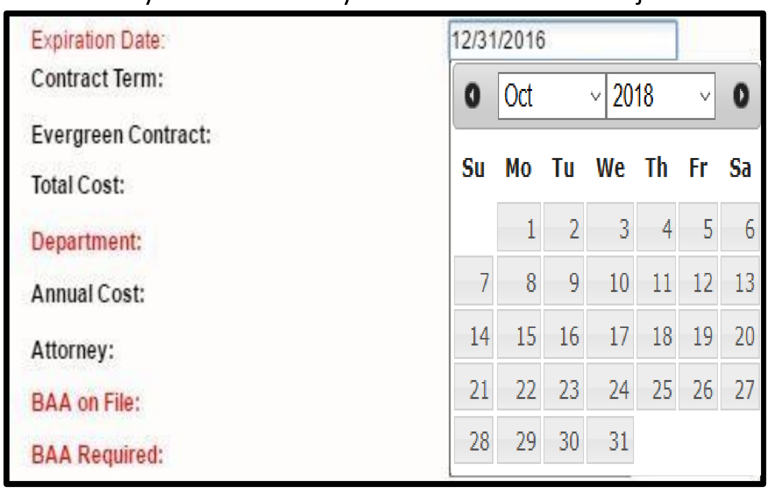
Mandatory Fields are not optional. You must fill in a value or you will not be allowed to leave the screen.

Checkbox Fields

Checkboxes are simple. They are either checked or not checked, that is, either true or false.

Date Field

You can simply key in the date into this field in mm/dd/yyyy format, or you use the *Date Field widget* to select the needed date. Choose your month and year and the calendar adjusts accordingly.



This particular (Expiration) Date Field has been marked Requested by the System Administrator.

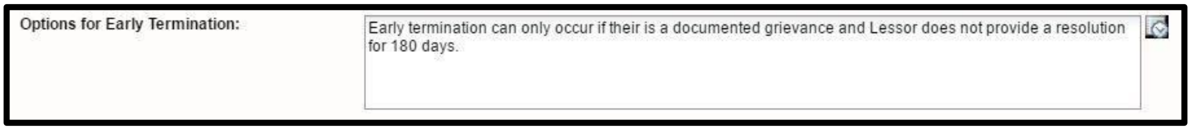
DropDown List Field

DropDown Lists allow you to select one value from the list. Click on the value to the right of the field name to reveal the DropDown.

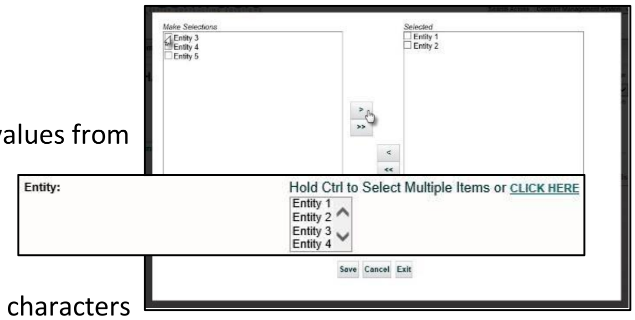
*This particular (Department) DropDown field is marked **Mandatory** by the System Administrator.*

MultiLine, MultiSelect, & Numeric Fields

MultiLine fields are long text fields. You can input as much alphanumeric text as needed here. Vertical scroll bars are added if needed.



MultiSelect fields allow you to choose multiple values from a DropDown list. You will have a *Click Here* option to edit the field/select values.



Numeric Fields will accept only numbers. Special characters like $ or commas will not work. However,you can use decimal points.

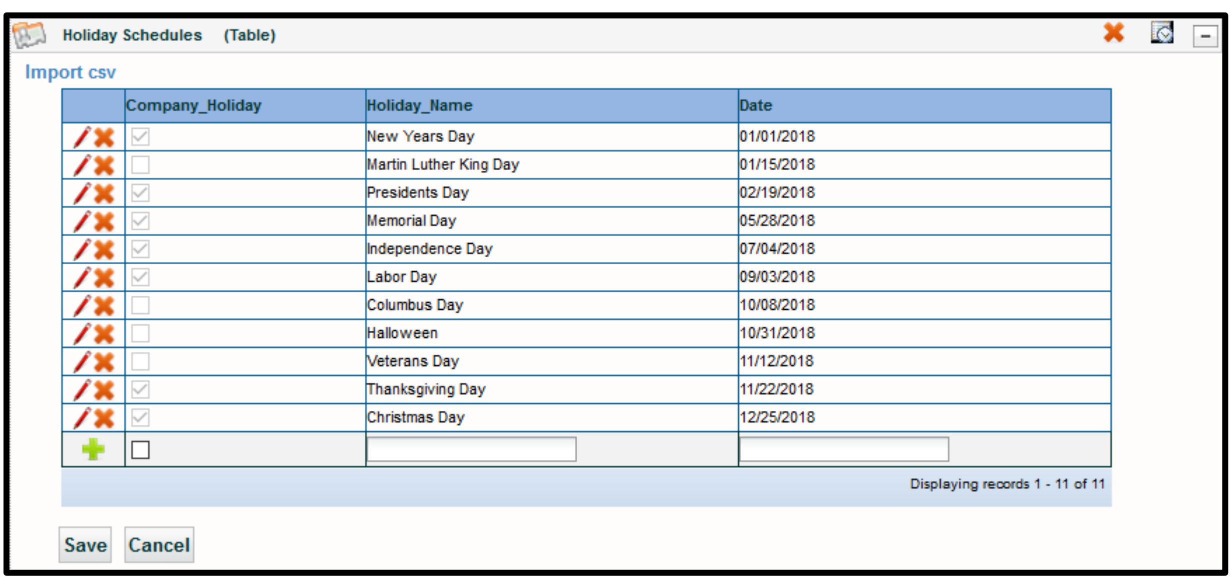
Your System Administrator determines what the minimum, maximum, and number of decimal places are needed for each numeric field.

SingleLine Field

These are short alphanumeric fields (like contact name or telephone number) and will only accept a maximum of 80 characters.

Table Fields

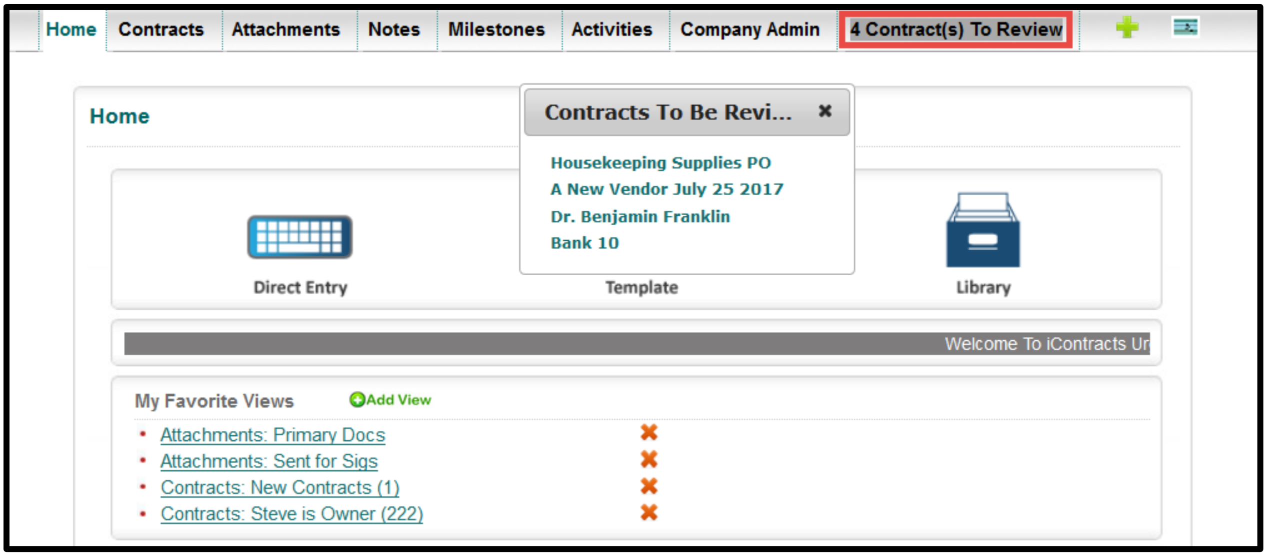
Table type fields show data in a matrix format. Column headings are pre-defined, as well as the type of data in each column. Each record can be edited or deleted. The ➕ adds a new record.



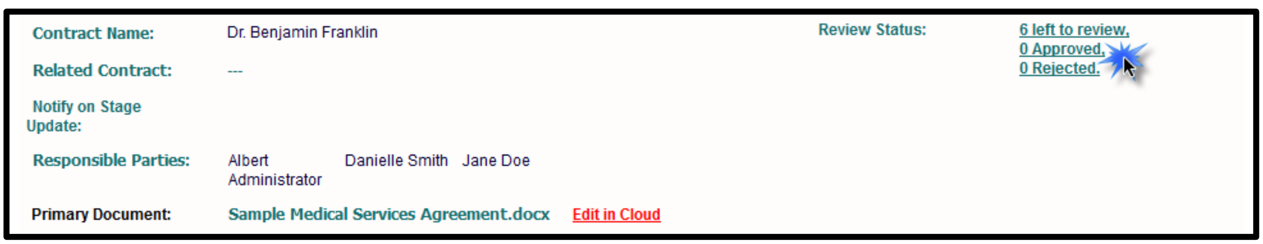
	Company_Holiday	Holiday_Name	Date
	☑	New Years Day	01/01/2018
	☐	Martin Luther King Day	01/15/2018
	☑	Presidents Day	02/19/2018
	☑	Memorial Day	05/28/2018
	☑	Independence Day	07/04/2018
	☑	Labor Day	09/03/2018
	☐	Columbus Day	10/08/2018
	☐	Halloween	10/31/2018
	☐	Veterans Day	11/12/2018
	☑	Thanksgiving Day	11/22/2018
	☑	Christmas Day	12/25/2018

Contract Reviewers

Contract Review allows cooperation among multiple users in the system. UCM will alert users if they have a contract or document to review by the notification, located on the *Enterprise Ribbon*, to the far right, even when not on 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 (if you have access).



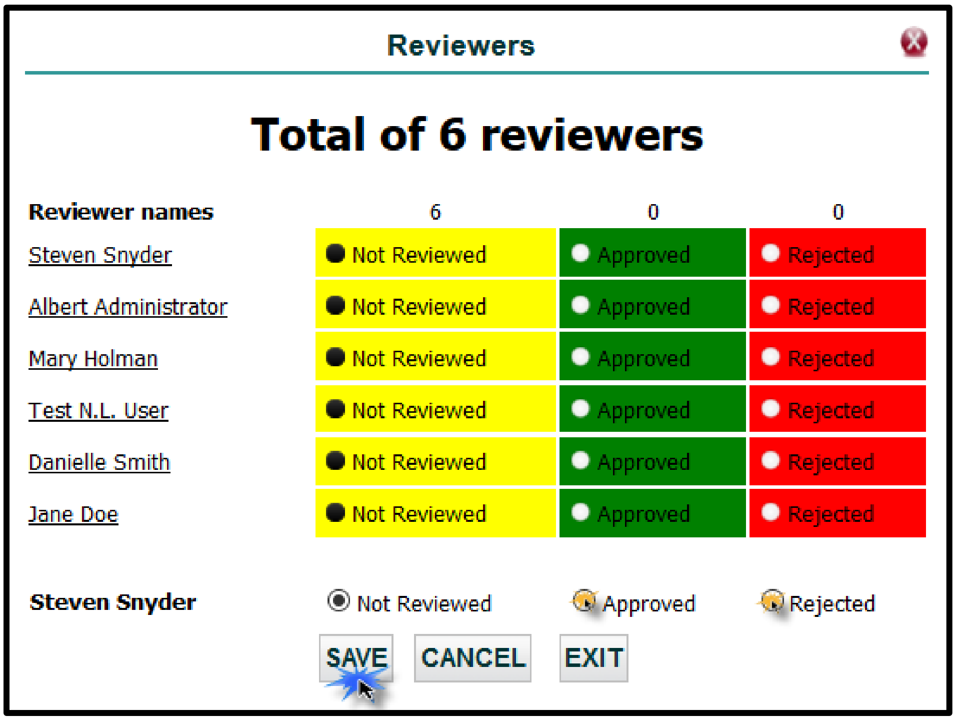
Reviewers can either **Approve** or **Reject** the contract by clicking on the contract name in the pop-up window, displayed when clicking on the contract *Review Notification Alert*, on the Enterprise Ribbon, as shown above, then clicking on the **Review Scoreboard** link in the *Contract Attributes* as shown below.

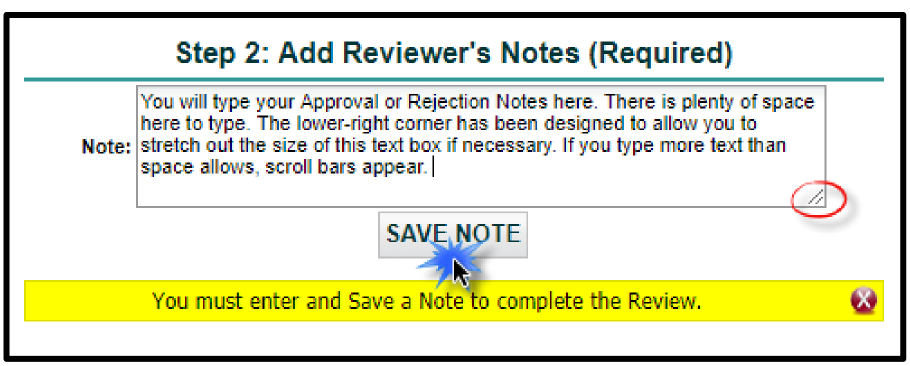


The Reviewers Scorecard

Displaying the **Scorecard** shows the current status of each reviewer. Categories are color-coded. Everyone begins in yellow – Not Reviewed – and once Approved or Rejected, your “score” is marked in the appropriate color.

Choose the *Approved* or *Rejected* button and click ***Save*** to register your choice. The system records the selection and notifies by email those users as defined by the Administrator.



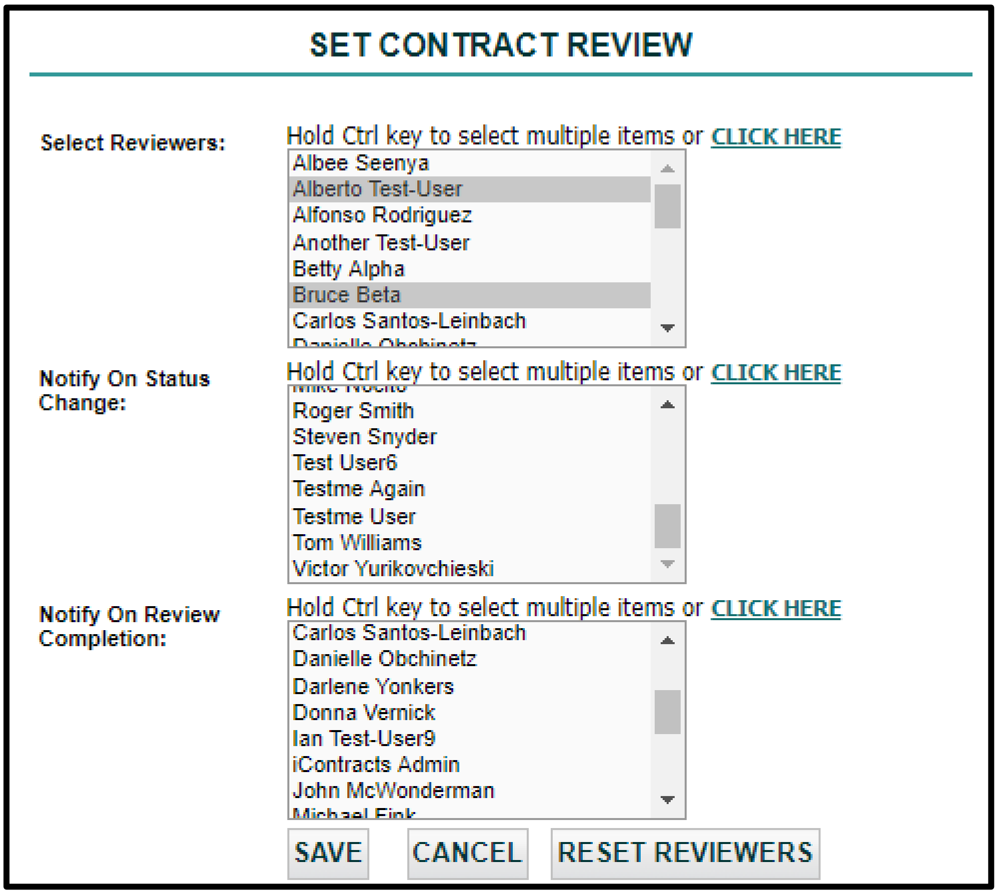


Once your approval/rejection is saved in the Reviewers Scorecard, you are next required to enter a Reviewer’s Note and save the note. This note will also be saved in the *Notes* tab of this Container and logged to the History tab as well. When finished, click ***Exit*** to return to the Summary tab.

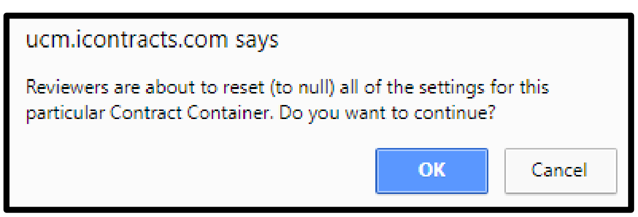
Adding Reviewers to a Contract

Reviewers can be set up in the Contract Container within the Summary tab by clicking on the *Review Status* link. While Read-Only Users can only review a Contract in the Scorecard, Full-Access Users can both select and modify assignees.

Select reviewers by clicking on the name or select multiple users by using the CLICK HERE link. Email notifications can also be designated here for *Notify On Status Change* and *Notify On Review Completion*. Click **Save** to update your Contract Reviewers.

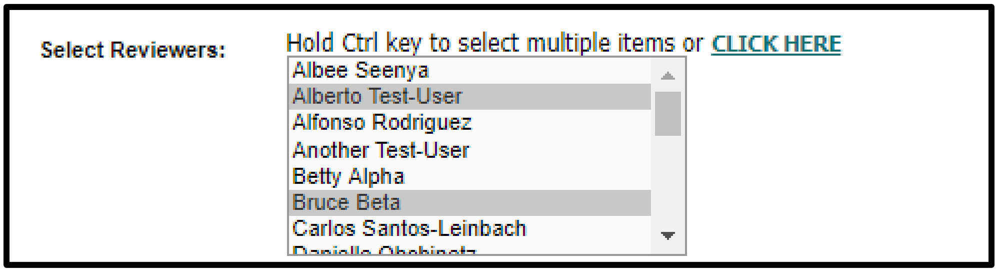


Click **Reset Reviewers** to remove all Reviewers. UCM displays a *Warning Message*; click **OK** to confirm.

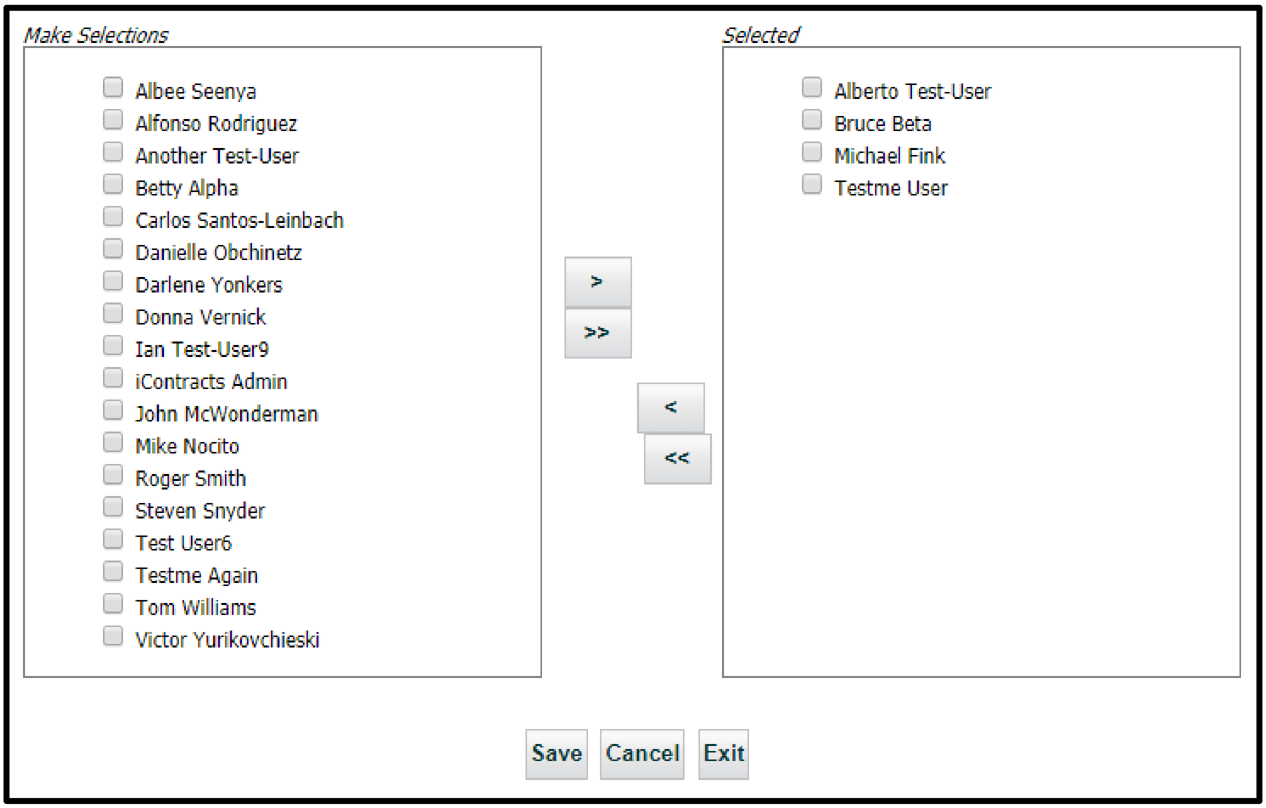


Setting Contract Reviewers with "Click Here"

Using the **CLICK HERE** feature is very similar to working with columns in grid views. Instead of fields on the left side, the Active Users are listed.



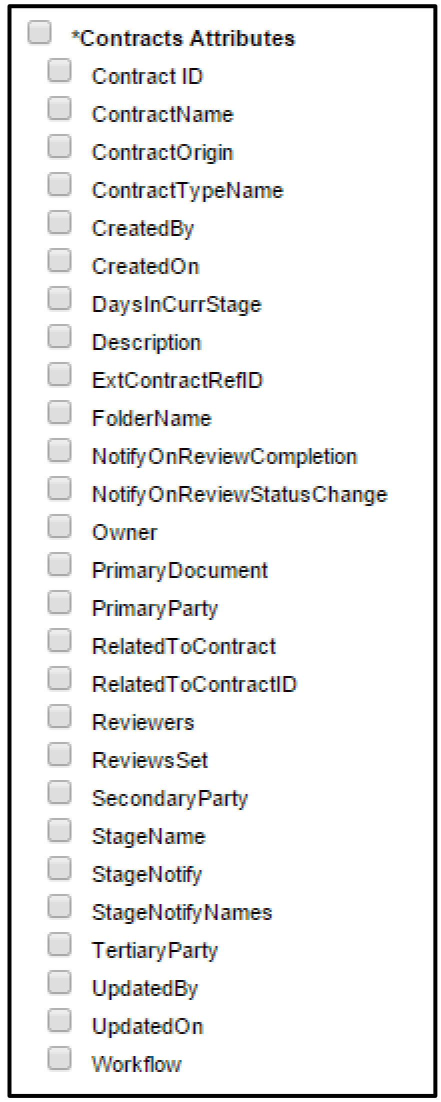
For additional assistance with these L-R-T columns, click this link to see the section on **Using_LRT_Columns** (using side-by-side columns).



Make sure to **Save** your selections, repeat for other *Set Contract Review* options, then click **Save** again to exit Set Contract Review and return to the Summary Tab.

Appendix A –Default Contract Fields (Attributes)

The lists of fields shown below are system-provided “out-of-the-box” **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
  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.
- 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.

Contract Attributes Not Shown

- Archive
- Archived On

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

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

Term	Definition
Field Groups	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.
Folder Permissions	A set of criteria that allow a user to modify or view contracts or documents contained in a specific folder.
Global Search	A search that occurs over the entire set of Contracts, documents, or object areas in UCM.
History/Audit Trail	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.
Interface	The viewing area of a computer program used for the purpose of viewing and inputting data.
Internal Contract	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.
Legacy System	Software systems that are currently or previously used by a company/entity.
Milestones	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.
Multi-Line (Field Type)	A data field that is used to capture long strings of text over 80 characters. Can be sentences, paragraphs, or entire pages of text.
Multi-Select (Field Type)	A data field used for selecting one or more values from a list.
Notes	An organized area for notations pertaining to each Contract Container.
Numeric (Field Type)	A field that contains numeric values of a prescribed size, including decimal precision.
Numeric-Calc (Field Type)	A Numeric field whose value is determined by a mathematical equation/calculation rather than the input of a specific value.
OCR	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.
Owner	The person (user) responsible for a Contract Container.

Term	Definition
Parent-Child Relationship	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.
Password	The input area on the login screen for a unique user's "key".
Permissions	Role or user-based security settings providing access or denial of access to view, modify, or delete contracts, documents, or other information.
Policies	Rules within an organization.
Primary Document	The main document for a Contract Container, designated by Full-Access or Admin Users.
Records	One or more rows of data (some combination of fields) within a database.
Related Contract	A record in the system that has been linked to another, often used for parent-child contract.
Reports	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.
Responsible Parties	An area for designating up to three additional users as responsible for a Contract (in addition to the Owner).
Role Models	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.
Single-Line (Field Type)	A field that can contain up to 80 characters, used for short pieces of text to be entered and tracked.
Stages	The steps that must be followed to progress through a Workflow in UCM.
States	A status that an attached document is in, such as Draft, Final, or Signed.
Template	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).
Train-the-Trainer	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.

Term	Definition
UCM	Universal Contract Manager
Username	The administrator-assigned login identity operators of the UCM system.
Views	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.
Workflow	The ordered process and steps of a Workflow used to manage the lifecycle of a contract.

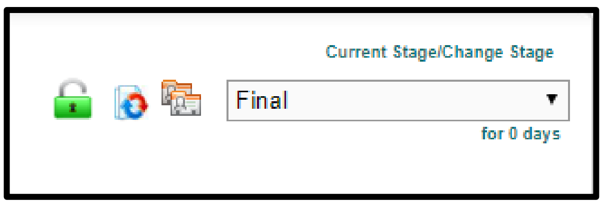
Appendix C – Supplemental Help for Latest Enhancements

The UCM System continues to add new features and updates throughout the year. As of this document's release, here are some of the features that you will find useful. New enhancements are announced via email to the UCM Administrators all year long. Supporting documentation is usually available to supplement this manual too, which is updated and released several times a year.

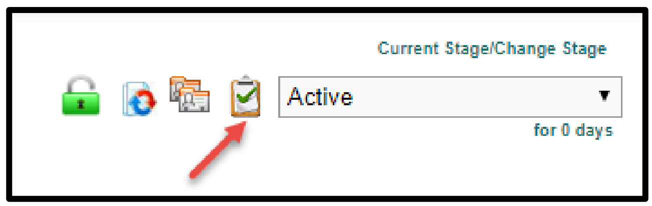
Not all enhancements are available to all UCM Users if either disabled by their Administrators, or not purchased by your company.

Concurrent Stage Reviews

UCM has an 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.



No Stage Review Needed (set by Admin)

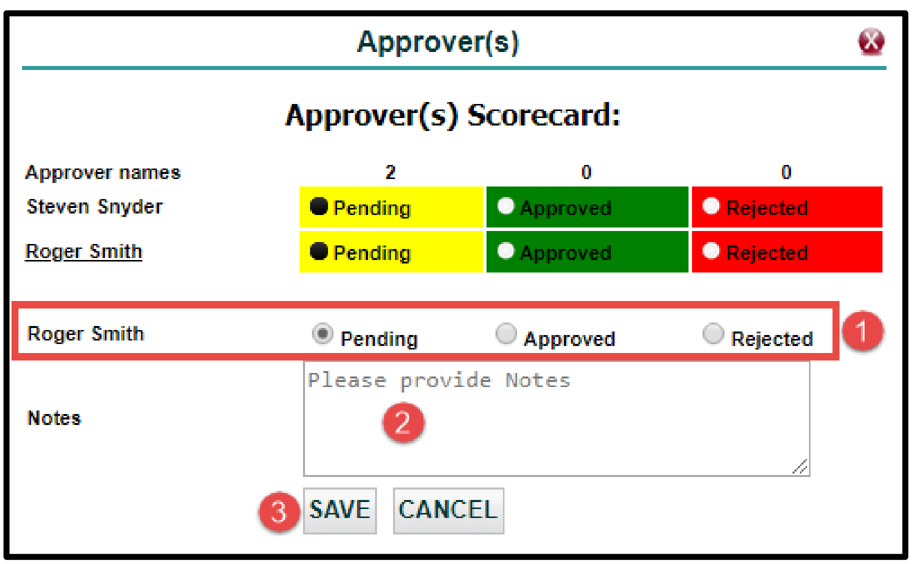


Stage Review Required (set by Admin)

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 (see images above).

Approvers (who receive an email) will click on this icon to display the **Approver(s) Scorecard**.



The Review Process is as follows:

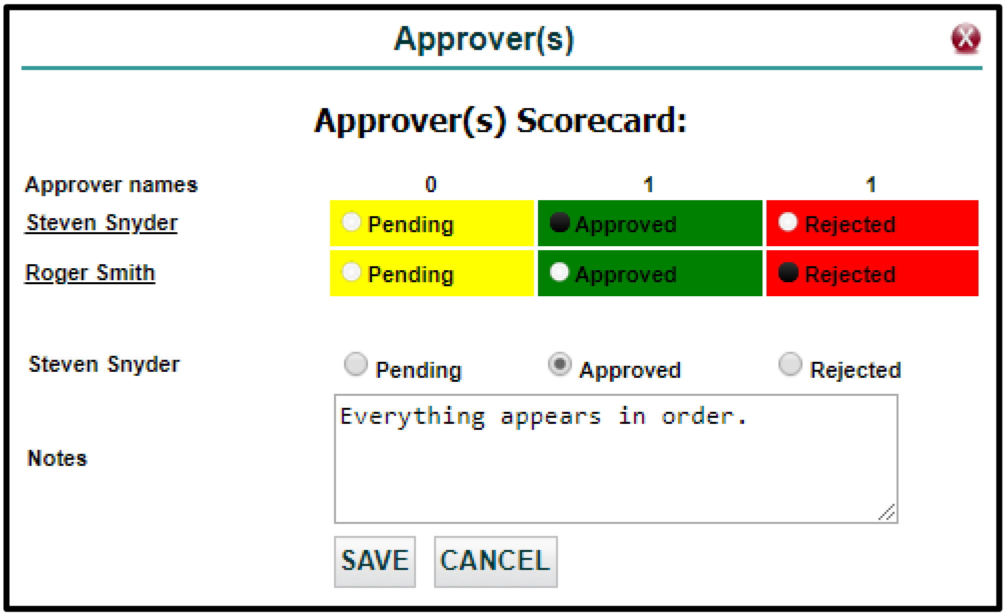
1. AFTER reviewing the Contract, you either click "**Approved**" or "**Rejected**" (as you can see from the image, the scorecard begins with *Pending*).

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.

Approvals

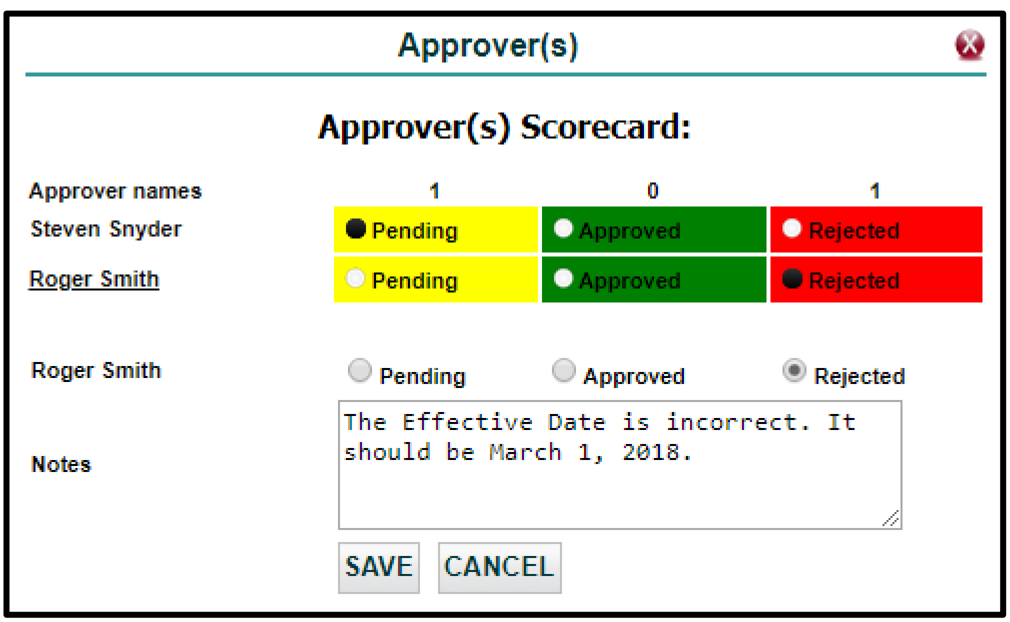
In this example, there are two Approver names. User 1 approved the Stage and saved their notes. When either user opens the Scorecard, they see who **Approved** in the green box. Approvals are not locked, as User 1 can change from Approved to Rejected if they have to (and update Notes accordingly). Any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



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

IA iContracts Admin
11:37 AM

To: 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

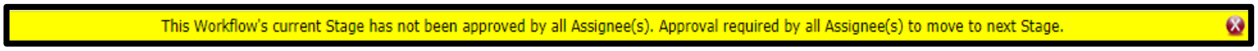
If anyone has Rejected a Stage, the stage will not advance. Once all assignees have Approved the stage, the Stage then automatically advances to the next stage in the Workflow.

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

Concurrent Stage 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.

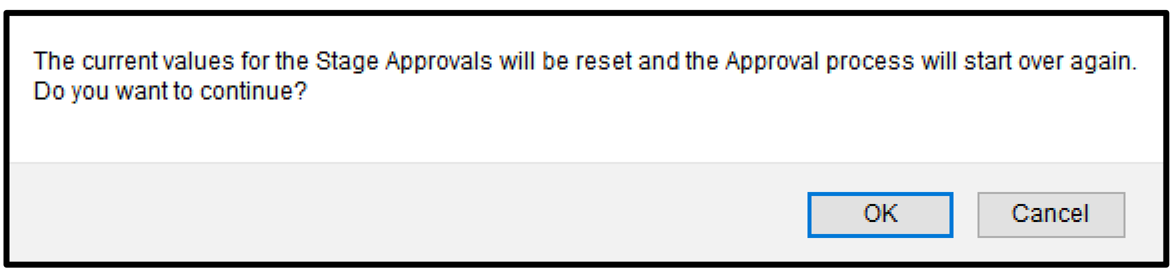


After All Assignees Approve

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

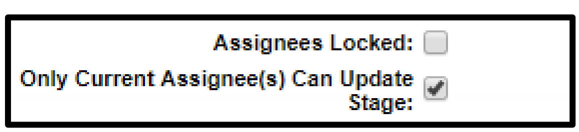
For whatever reason, if an Approved Stage must be retracted and moved backwards, this warning message displays.



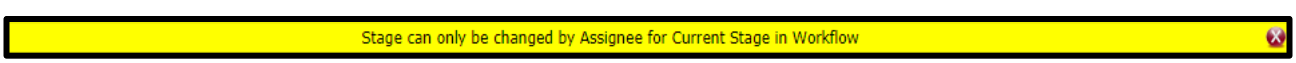
If you click **OK** the entire Approval process will start all over again and each Stage Assignee will have to review and approve the Workflow Stage once again to automatically move the Stage forward.

Non-Assignees Trying to Advance a Stage

If a User who isn't an Assignee tries to move a Stage forward, they will display a different error message. The Workflow Template Administration screen (visible to Admins only) must have the "**Only Current Assignee(s) Can Update Stage**" checked to prevent non-assignees from moving unapproved stages.



Non-assignees will see this message:



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.

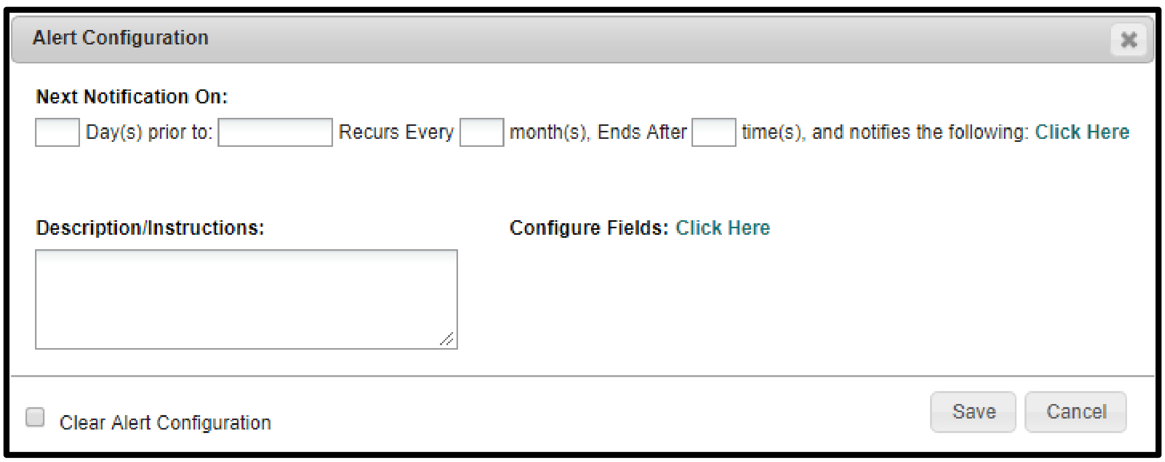
Stage updated to Executed	Stage	Stage Forward from Active to Executed after 0 days
Workflow (Concurrent Workflow Stage Approvals), stage (Active) approval status updated to Approved By Roger Smith. Contract will be moving to Executed. Additional Notes: The Effective Date has been corrected.	Notes	Workflow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

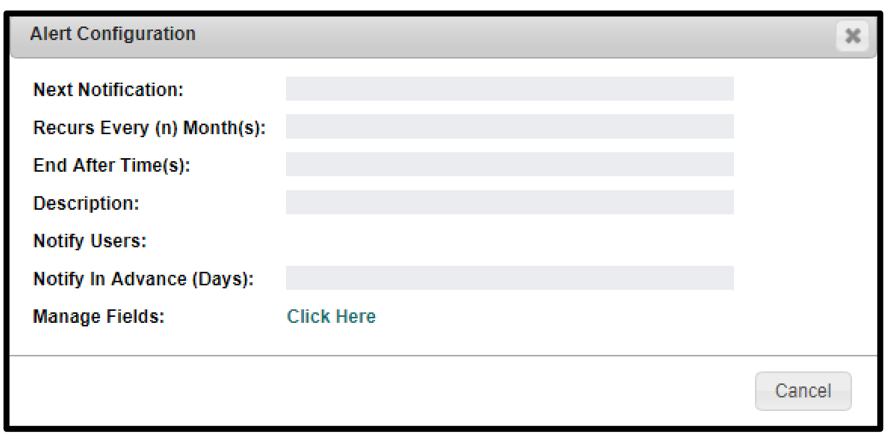
Configuring Contract Alerts

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.

Activating the Alerts in a Contract Container

Click on **Alert Configuration** to display the *Alert Configuration* window.

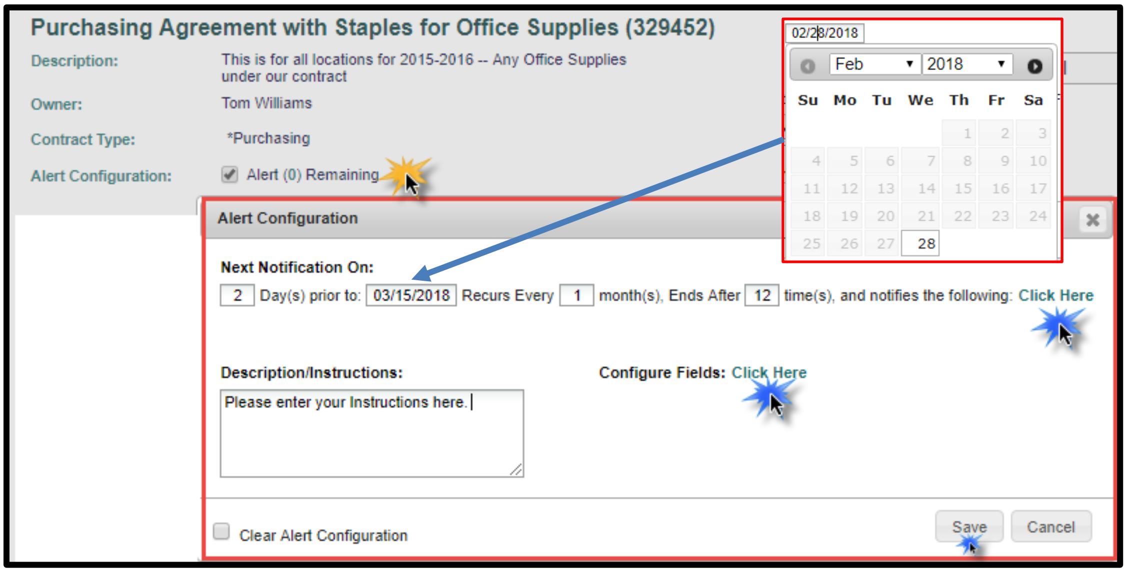




If the user is denied the Create/Edit Alert Notification permission, this window is grayed out (see image above).

Using Alert Configuration

Enter the number of days *prior* to the *selected date* for notification. When you click on the date block, a calendar widget appears, similar to other date functions in UCM.



Enter how often you want this Alert to *recur* (monthly), and *how many* times.
Use the first "**Click Here**" to select *which users* (at least 1 user) to notify when this Alert is due (displays a L-R-T two-column display), and the other "**Click Here**" link to *Configure the Fields* that appear in the email notification (similar to fields used for Milestone emails, like Contract Name, Owner, etc.).

Click **Save** to update and process the Alert.

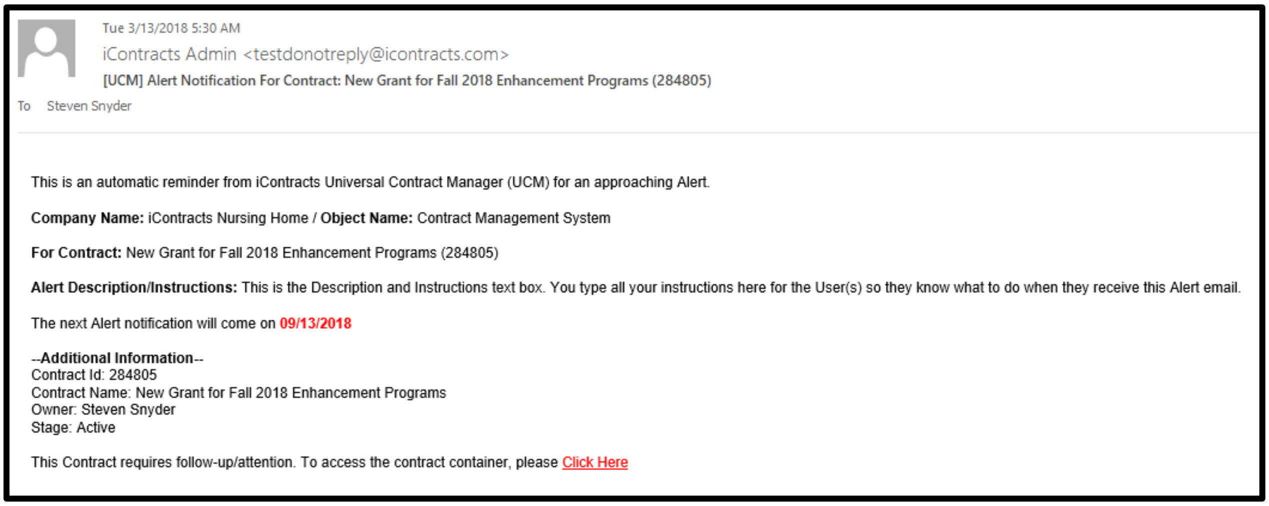
The **Clear Alert Configuration** checkbox will remove ALL alert settings (dates, users, instructions, etc.) but you also need to click **Save** to officially clear the alert. You can also click *Cancel* to back out if necessary.

The Countdown on the Contract Container

Once you Save your Alerts, 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.



Tue 3/13/2018 5:30 AM
iContracts Admin <testdonotreply@icontracts.com>
[UCM] Alert Notification For Contract: New Grant for Fall 2018 Enhancement Programs (284805)
To Steven Snyder

This is an automatic reminder from iContracts Universal Contract Manager (UCM) for an approaching Alert.

Company Name: iContracts Nursing Home / **Object Name:** Contract Management System

For Contract: New Grant for Fall 2018 Enhancement Programs (284805)

Alert Description/Instructions: This is the Description and Instructions text box. You type all your instructions here for the User(s) so they know what to do when they receive this Alert email.

The next Alert notification will come on **09/13/2018**

--Additional Information--
Contract Id: 284805
Contract Name: New Grant for Fall 2018 Enhancement Programs
Owner: Steven Snyder
Stage: Active

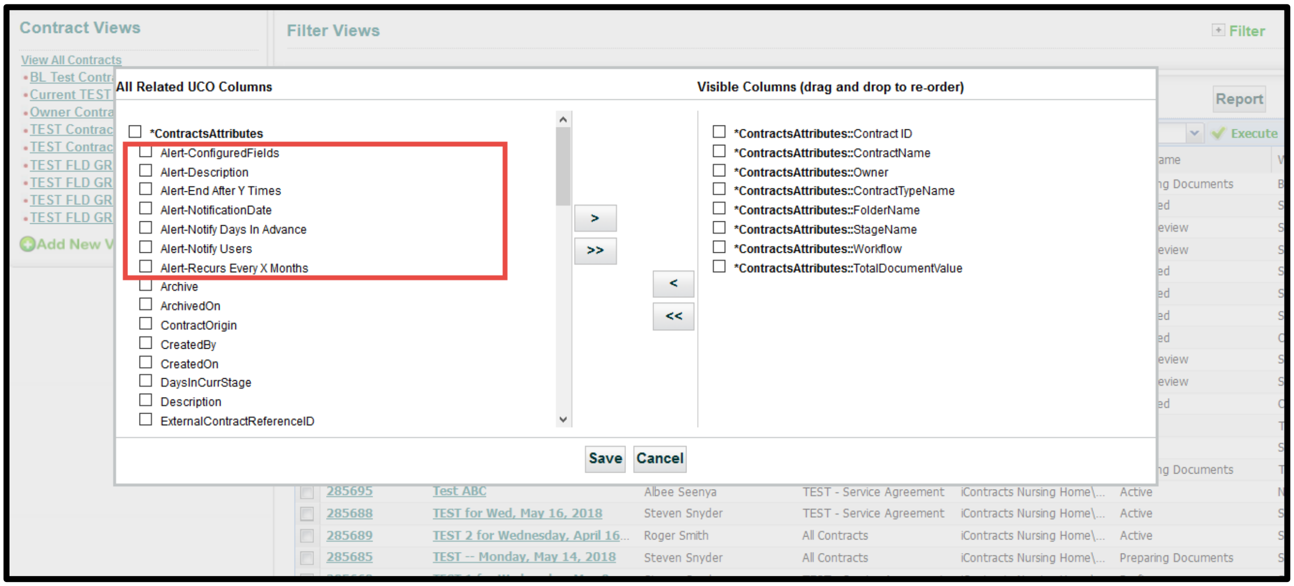
This Contract requires follow-up/attention. To access the contract container, please Click Here

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*".

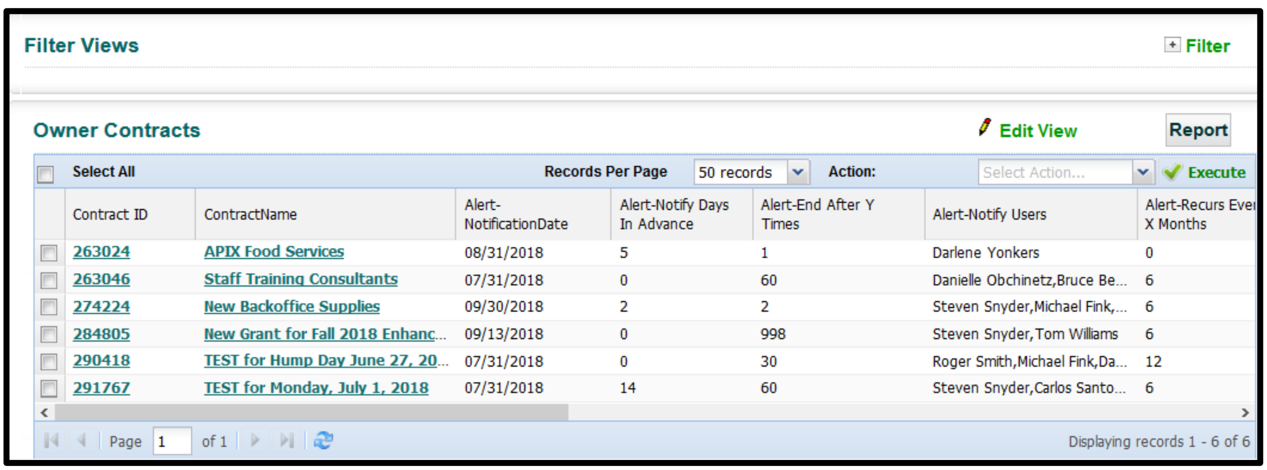
Individual or final alerts will instead have the message: *"This is currently the last Alert notification for this container."*

Viewing Alert Attributes in Contract Views

Select these *Contract Attributes* as you would any field available in a Contract View L-R-T. You can position them wherever in the grid you need to display them.

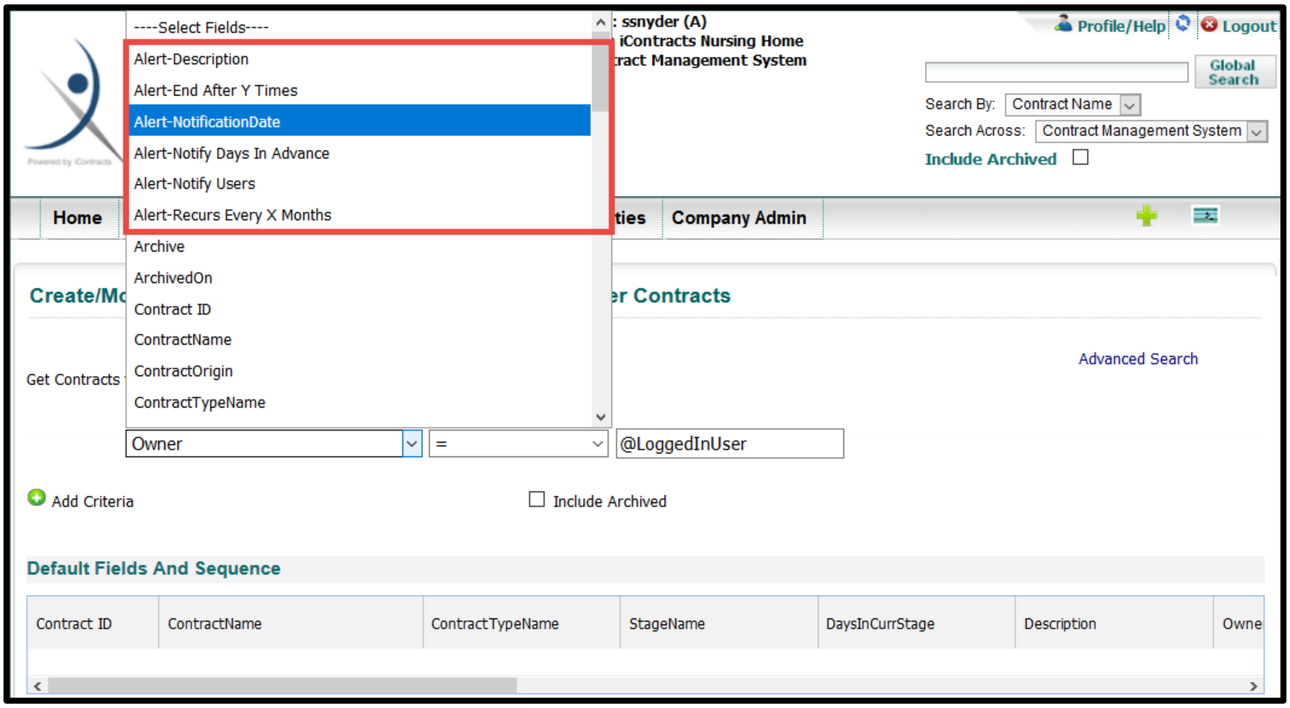


After you **Save** your *Contract View*, the Alert Fields appear as part of the grid.

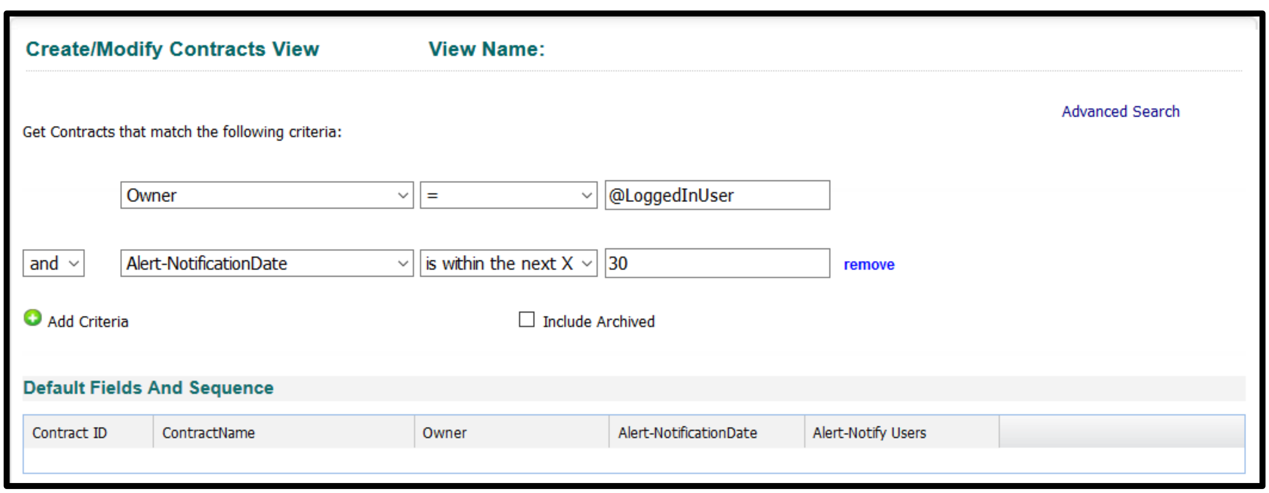


Using Alert Fields in Contract Search Criteria

In addition to these fields displaying in the "*Default Fields And Sequence*", you can also **Select** these **Fields** as **Search Criteria**. You can use one or multiple criteria, as you would with any other contract fields. These fields are available for both Simple and Advanced Searches.



For example, you can search for contracts where the Owner is @LoggedInUser AND the Alert-Notification Date is within the next 30 days.

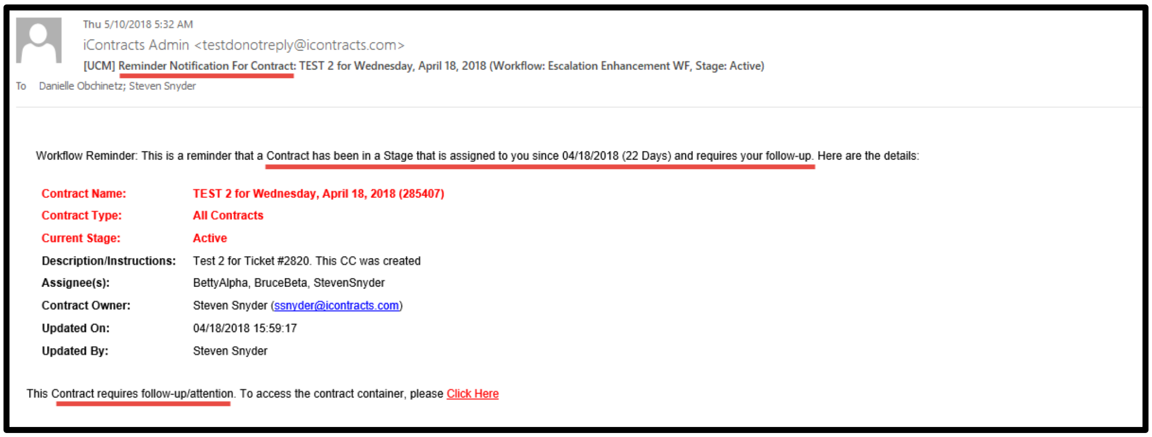


Workflow Stage Reminders and Escalation Emails

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:



Thu 5/10/2018 5:32 AM
iContracts Admin <testdonotreply@icontracts.com>
[UCM] Reminder Notification For Contract: TEST 2 for Wednesday, April 18, 2018 (Workflow: Escalation Enhancement WF, Stage: Active)
To Danielle Obchinetz; Steven Snyder

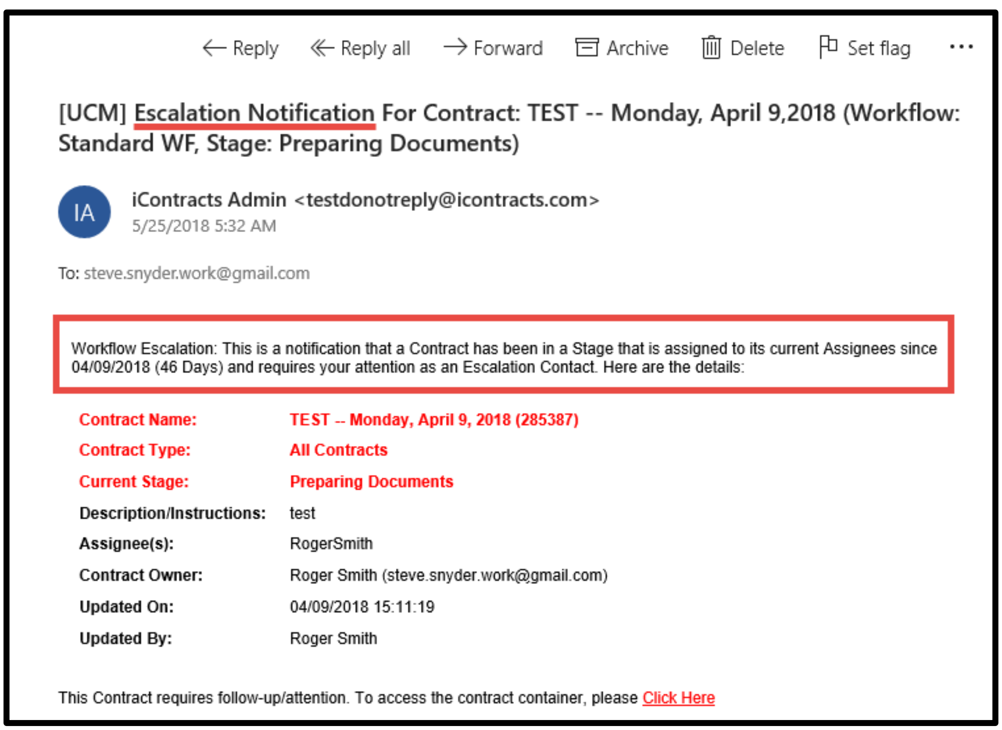
Workflow Reminder: This is a reminder that a Contract has been in a Stage that is assigned to you since 04/18/2018 (22 Days) and requires your follow-up. Here are the details:

Contract Name:	TEST 2 for Wednesday, April 18, 2018 (285407)
Contract Type:	All Contracts
Current Stage:	Active
Description/Instructions:	Test 2 for Ticket #2820. This CC was created
Assignee(s):	BettyAlpha, BruceBeta, StevenSnyder
Contract Owner:	Steven Snyder (ssnyder@icontracts.com)
Updated On:	04/18/2018 15:59:17
Updated By:	Steven Snyder

This Contract requires follow-up/attention. To access the contract container, please Click Here

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:



Reply Reply all Forward Archive Delete Set flag ...

[UCM] Escalation Notification For Contract: TEST -- Monday, April 9,2018 (Workflow: Standard WF, Stage: Preparing Documents)

IA iContracts Admin <testdonotreply@icontracts.com>
5/25/2018 5:32 AM

To: steve.snyder.work@gmail.com

Workflow Escalation: This is a notification that a Contract has been in a Stage that is assigned to its current Assignees since 04/09/2018 (46 Days) and requires your attention as an Escalation Contact. Here are the details:

Contract Name:	TEST -- Monday, April 9, 2018 (285387)
Contract Type:	All Contracts
Current Stage:	Preparing Documents
Description/Instructions:	test
Assignee(s):	RogerSmith
Contract Owner:	Roger Smith (steve.snyder.work@gmail.com)
Updated On:	04/09/2018 15:11:19
Updated By:	Roger Smith

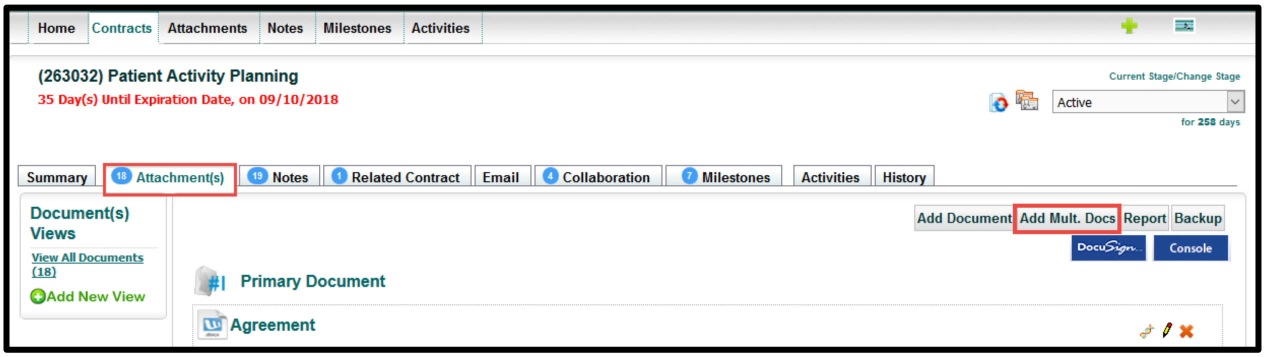
This Contract requires follow-up/attention. To access the contract container, please Click Here

Uploading Multiple Documents

UCM has added an enhancement for all users with permissions set to upload documents. Documents must have **filenames less than 100 characters long, each under 20 MB in size, and a maximum of 200 files per upload**. If any file in the group doesn't meet these requirements, you must remove it from the list before completing the multiple file upload. In addition, all documents via group uploading will be *Supporting* documents only.

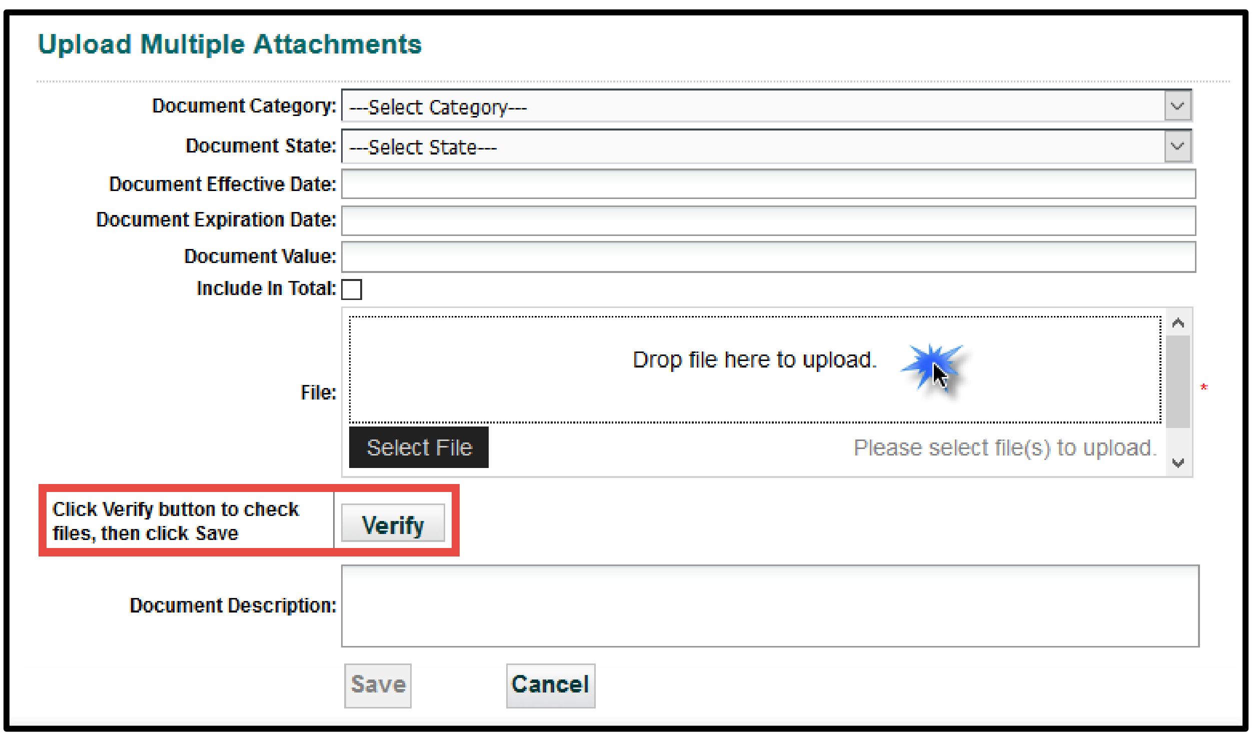
Uploading Multiple Attachments via Drag and Drop

Using the Contract Ribbon's Attachment(s) tab, you can "**Add Document**" and now "**Add Multiple Documents**" in a single process.

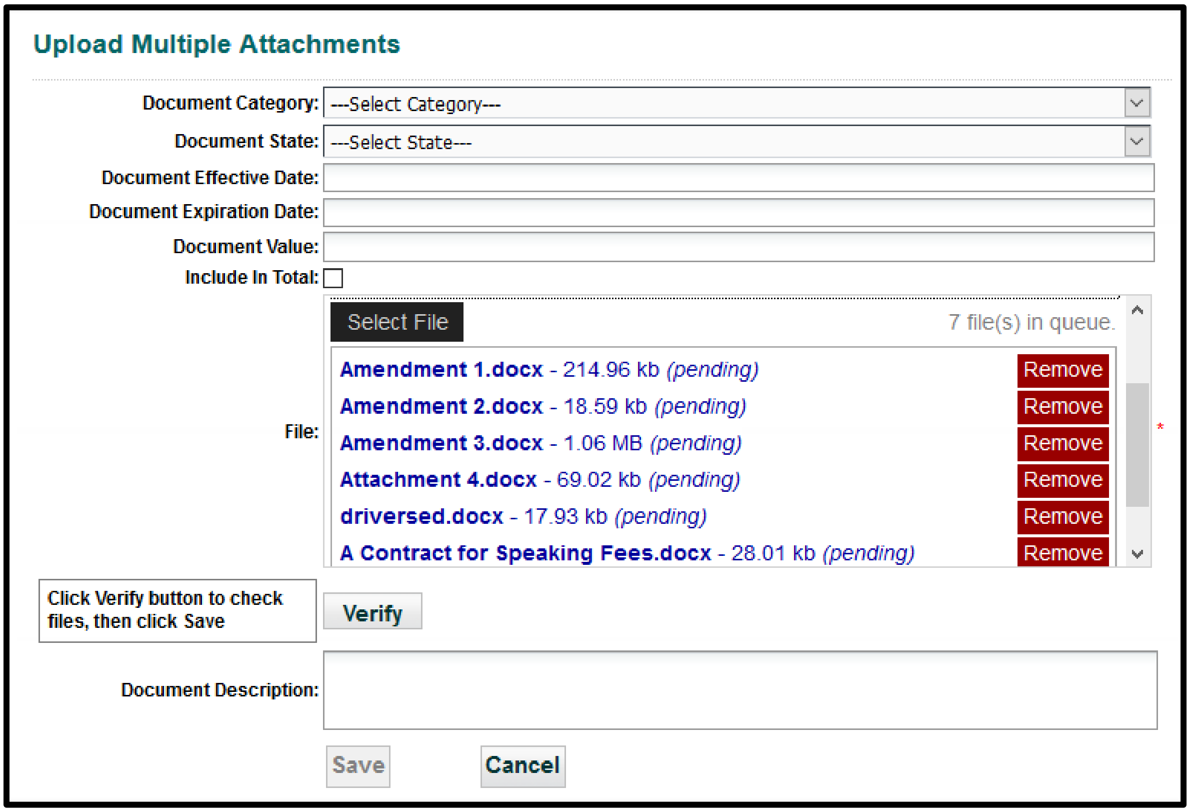


Click the "*Add Mult. Docs*" button.
Drag and drop your files from your **Explorer Window** into the "*Drop file here to upload*" section.

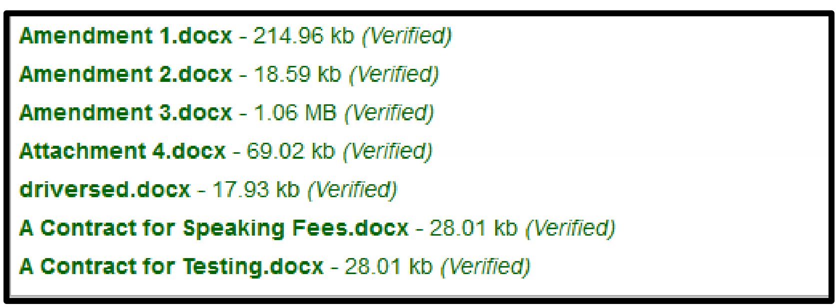
As shown in the image below, click the **Verify** button prior to the *Save* button (which is grayed out initially).



An individual file can be removed from the list before you click on the **Verify** button. You *cannot* remove a file *after* clicking the **Verify** button. You would have to click *Cancel* and start the process again.



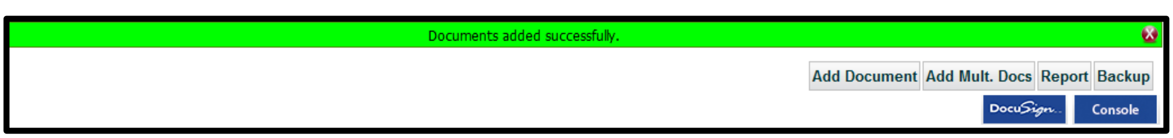
Once you click the **Verify** button, the system makes sure that all attachment files meet the requirements for uploading into UCM. Each accepted file changes from blue, to orange (briefly), then to green.



At this point, if you have not done so already, you can add the *Document Category*, *Document State*, and/or *Document Description*. These will apply equally to all uploaded documents.

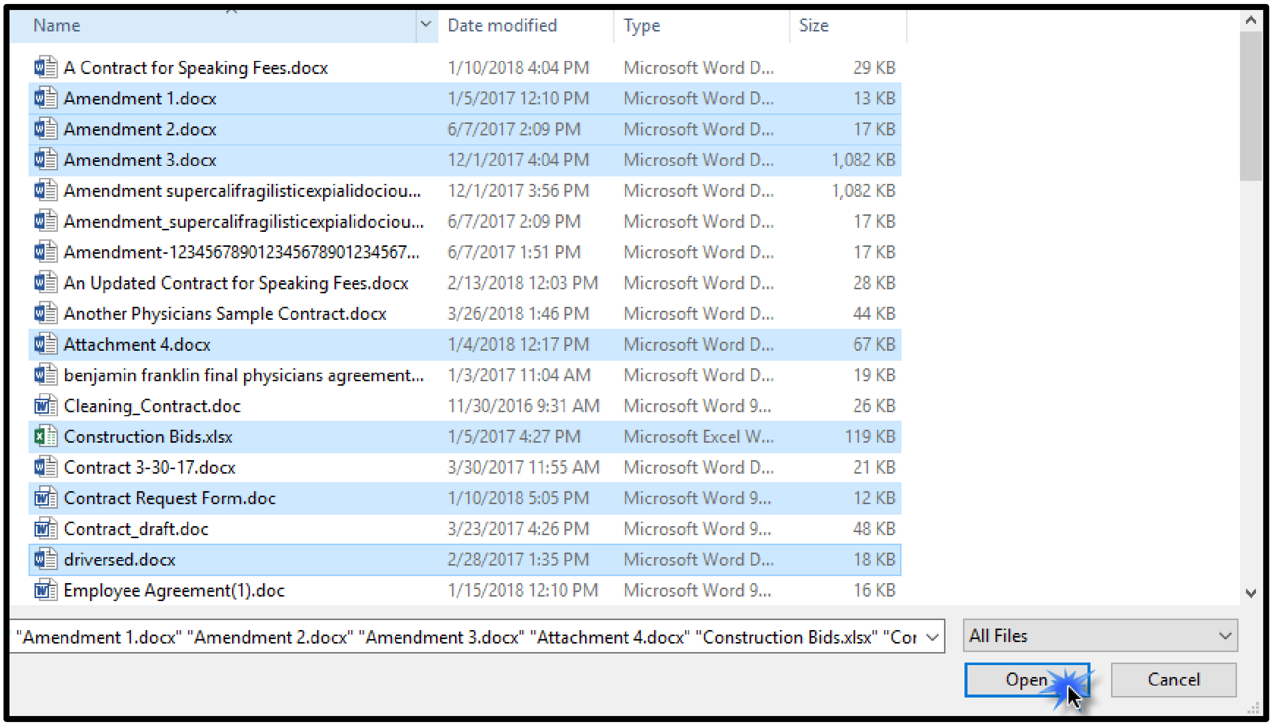
You can now click the **Save** button.

A UCM message ribbon will tell you that these **Documents added successfully**.

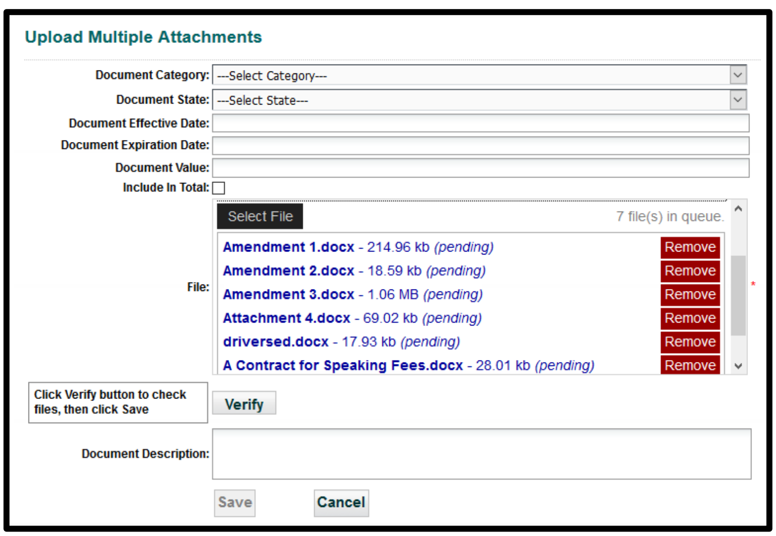


Uploading Multiple Documents Without Using Drag and Drop

After you click the "**Add Mult. Docs**" button, you can also click the **Select File** button. Your file directory allows you to select multiple files. Hold the **[Ctrl]** key while selecting additional documents. The **[Ctrl]** key is also used to deselect any highlighted file. The same rules apply as dragging multiple files.



Click **Open** to populate the document list screen.
Each document has its own "***Remove***" button if you change your mind or selected the wrong document.



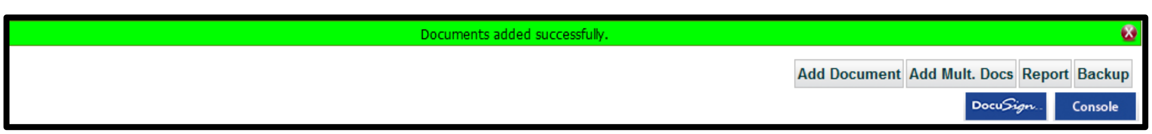
Click **Verify** to make sure all selected files meet the upload requirements.

Each accepted file changes from blue, to orange (briefly), then to green.

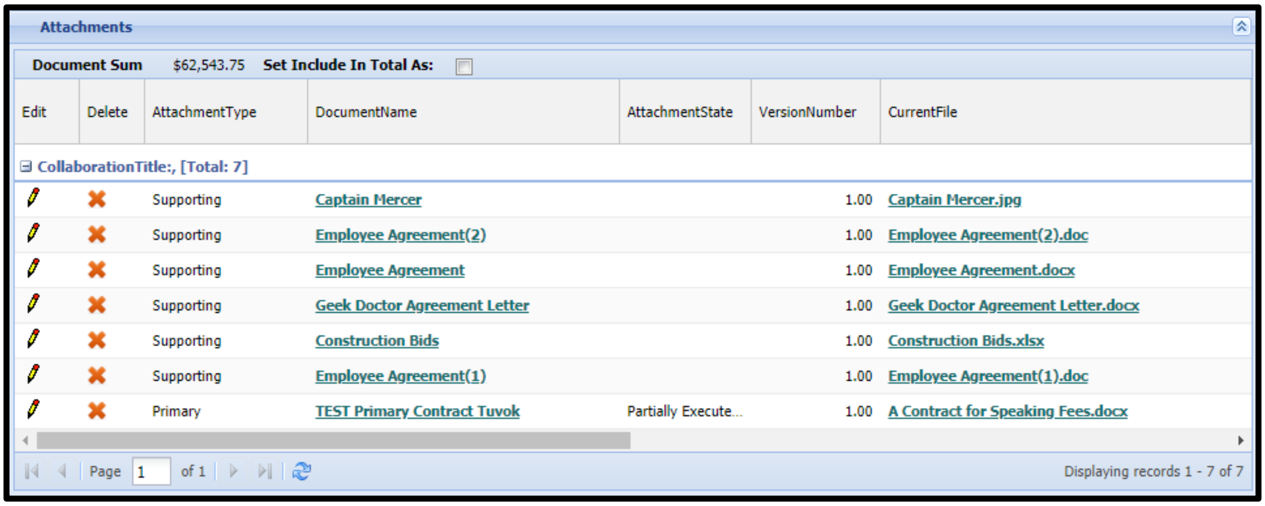
If you have not done so already, you can add the *Document Category*, *Document State*, and/or *Document Description*. These will apply to all the uploaded documents.

Click **Save** to complete the process.

A UCM message ribbon will tell you that these **Documents added successfully.**

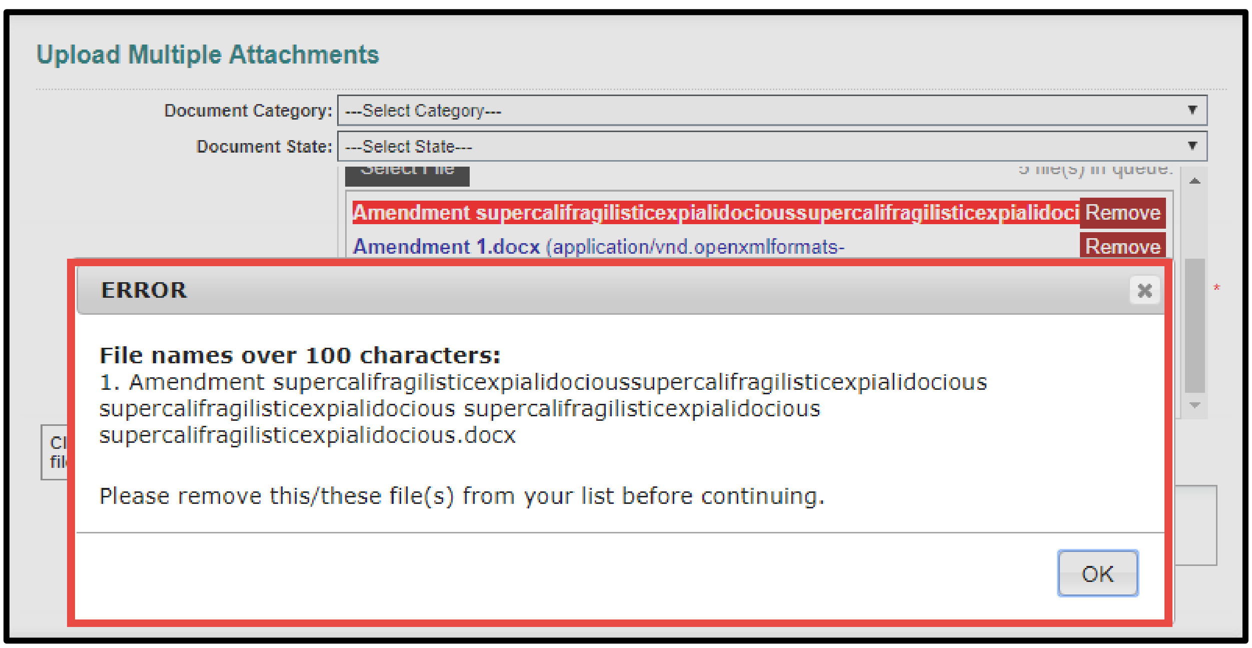


The Attachments grid displays the uploaded Supporting documents.



Selecting Invalid File Types

If you select any files that do not meet our upload requirements – ex: filename too long, file size too large, or invalid file type – you will get an error message after clicking on the **Verify** button. The invalid files are highlighted in red.



Removing Invalid Files

1. Click the **OK** button on the ERROR message to acknowledge the error.
2. Click the **Remove** button to delete the invalid attachment from the list.
3. Click the **Verify** button again.
4. Make sure there are no additional errors. Accepted files are now displayed in green.
5. Click the **Save** button to upload. *-OR-* You can click **Cancel** and start the process over again.

Email Responses to Activities

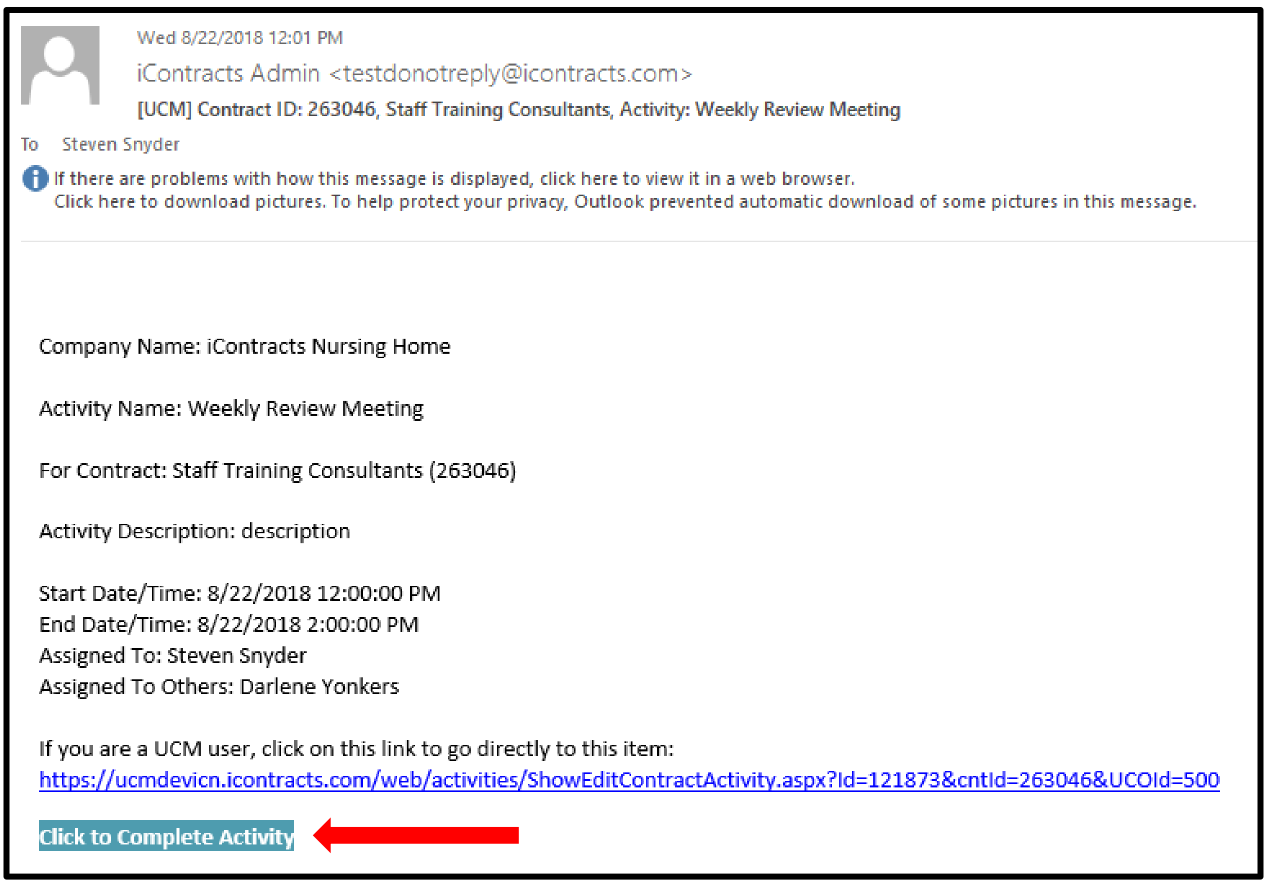
We have introduced a new feature in the *Activities notification email* which allows the "***Assigned To***" users, *including No Log-In Users*, to **Complete the Activity** directly from within the email. This change requires that a separate email is sent to each user associated with an individual activity. 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.



Wed 8/22/2018 12:01 PM
iContracts Admin <testdonotreply@icontracts.com>
[UCM] Contract ID: 263046, Staff Training Consultants, Activity: Weekly Review Meeting
To Steven Snyder
If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

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

If you are a UCM user, click on this link to go directly to this item:
https://ucmdevicn.icontracts.com/web/activities/ShowEditContractActivity.aspx?Id=121873&cntId=263046&UCOId=500

Click to Complete Activity

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.

[UCM] Contract ID: 263046, Staff Training Consultants, Activity: Weekly Review Meeting Inbox x

iContracts Admin <testdonotreply@icontracts.com> 12:00 PM (3 minutes ago)
to me

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

If you are a UCM user, click on this link to go directly to this item:
https://ucmdevicn.icontracts.com/web/activities/ShowEditContractActivity.aspx?Id=121873&cntId=263046&UCOId=500

Reply Forward

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**.

FULL-ACCESS MANUAL